

Naan Mudhalvan  
Salesforce Developer(Course)  
Assignment no 1

Name : Yuvashree S  
Naan Mudhalvan id : au611420104095  
Year & Dep : 4<sup>th</sup> year & CSE  
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 'New Custom Object' setup page in Salesforce. The page is titled 'New Custom Object' and has a 'Help for this Page' link. Below the title, there is a yellow banner with a message: 'Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more!](#) [Don't show this message again](#)'. The main section is 'Custom Object Definition Edit' with 'Save', 'Save & New', and 'Cancel' buttons. The 'Custom Object Information' section includes fields for 'Label' (college), 'Plural Label' (colleges), 'Object Name' (college), and 'Description'. There are also checkboxes for 'Starts with vowel sound' and 'Context-Sensitive Help Setting'. The 'Enter Record Name Label and Format' section includes a 'Record Name' field (college Name) and a 'Data Type' dropdown (Text). The 'Optional Features' section has checkboxes for 'Allow Reports', 'Allow Activities', 'Track Field History', 'Allow in Chatter Groups', and 'Enable Licensing'. The 'Object Classification' section has checkboxes for 'Allow Sharing', 'Allow Bulk API Access', and 'Allow Streaming API Access'. The 'Deployment Status' section has radio buttons for 'In Development' and 'Deployed'. The 'Search Status' section has a checkbox for 'Allow Search'. The 'Object Creation Options' section has checkboxes for 'Add Notes and Attachments related list to default page layout' and 'Launch New Custom Tab Wizard after saving this custom object'. At the bottom, there are 'Save', 'Save & New', and 'Cancel' buttons.

## Second custom objects, let's call them "Department\_C"

Setup Home Object Manager

### New Custom Object

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](#) [Go to where this resource lives](#)

**Custom Object Definition Edit** Save Save & New Cancel

**Custom Object Information** Required Information

The singular and plural labels are used in tabs, page layouts, and reports:

Label:  Example: Account

Plural Label:  Example: Accounts

Starts with vowel sound: ☐

The Object Name is used when referencing the object via the API:

Object Name:  Example: Account

Description:

Consult Salesforce Help Setting: ☒ Open the standard Salesforce.com Help & Training window  
☐ Open a window using a Visualforce page

Content Name:

**Enter Record Name Label and Format**

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

Record Name:  Example: Account Name

Data Type:

**Optional Features**

☐ Allow Reports  
☐ Allow Activities  
☐ Track Field History  
☐ Allow in Chatter Groups  
☐ Enable Licensing

**Object Classification**

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

☒ Allow Sharing  
☒ Allow Bulk API Access  
☒ Allow Streaming API Access

**Deployment Status** What is this?

☐ In Development  
☒ Deployed

**Search Status**

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

☐ Allow Search

**Object Creation Options (Available only when custom object is first created)**

☐ Add Notes and Attachments related list to default page layout  
☐ Launch New Custom Tab Wizard after saving this custom object

Save Save & New Cancel

## Step 2: Create a Master-Detail Relationship

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

1. Go to Setup > Object Manager.
2. Click on "College\_\_c" to open its settings.

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

Setup

Home

Object Manager

Search Setup

Setup > OBJECT MANAGER

CDepartment

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

Details

Description

API Name

CDepartment\_\_c

Custom

✓

Singular Label

CDepartment

Plural Label

CDepartments

Enable Reports

Track Activities

Track Field History

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

Edit

Delete

Setup

Home

Object Manager

Search Setup

Setup > OBJECT MANAGER

CDepartment

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

CDepartment

New Relationship

Help for this Page

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

Step 3 of 6

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, view, 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.

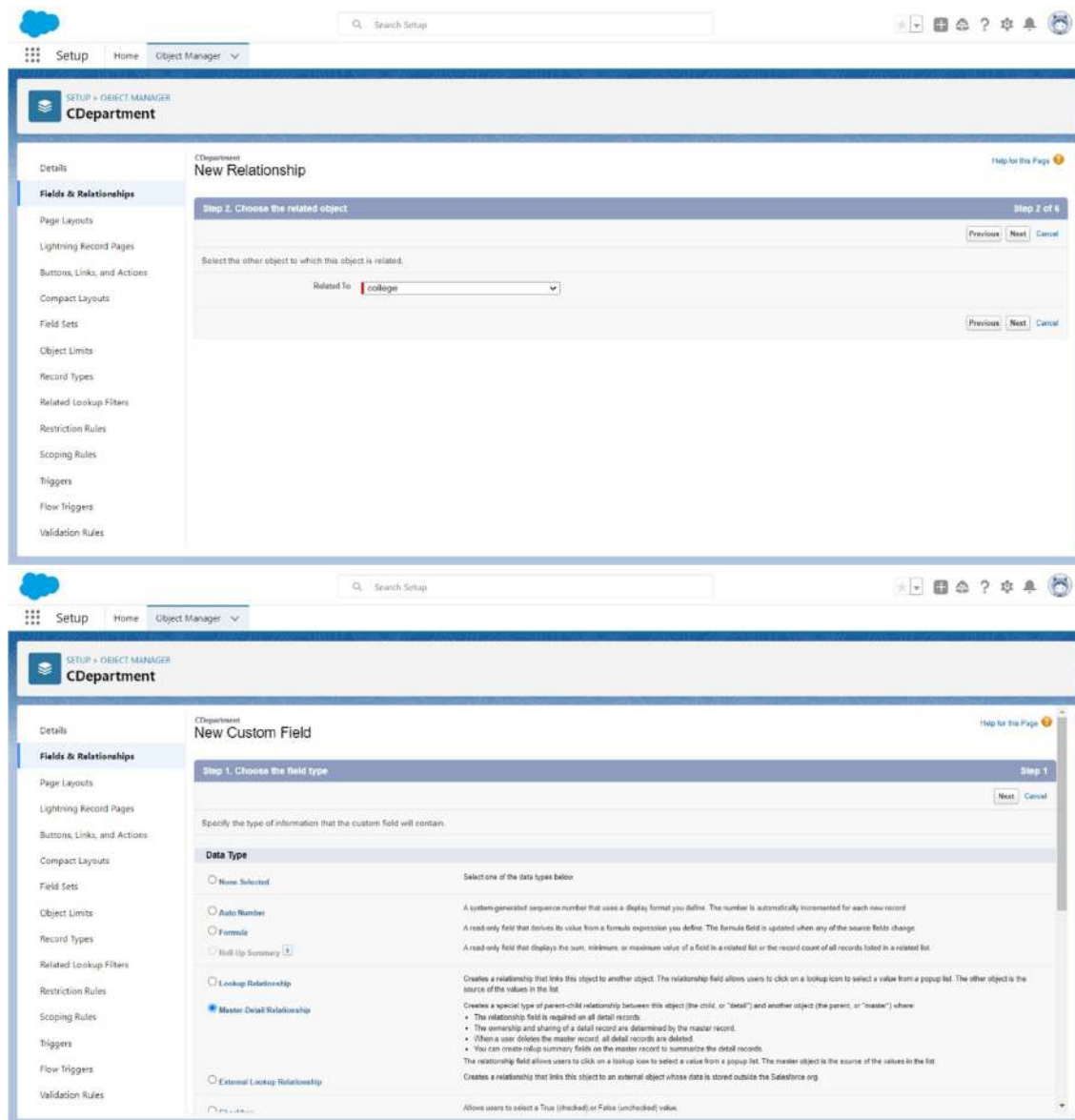
Allow reparenting

☐ 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 entity.

Lookup Filter

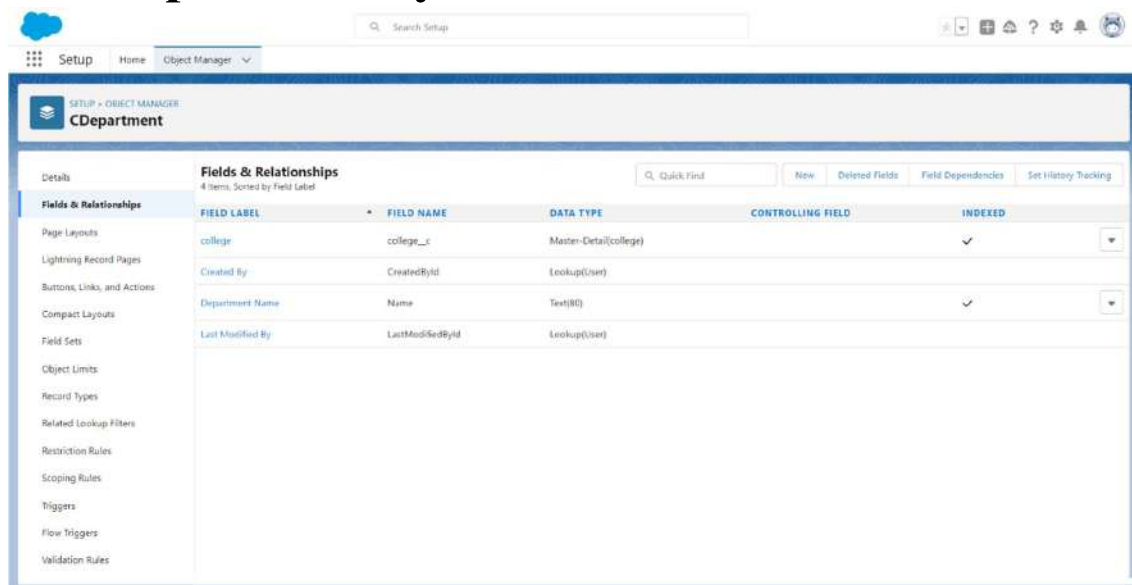


## Step 3: Create the Roll-Up Summary Field

Now, let's create a Roll-Up Summary Field on the "College\_C" to calculate the total number of related records in "Department\_\_C":

1. Still on the "College\_\_c" settings, go to "Fields & Relationships."

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



Setup

Home

Object Manager

Search Setup

tabs

User Interface

Rename Tabs and Labels

Tabs

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

SETUP

Tabs

Help for this Page

Custom Tabs

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

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

Custom Object Tabs

New What Is This?

| Action     | Label             | Tab Style   | Description |
|------------|-------------------|-------------|-------------|
| Edit   Del | Book1             | Icon        |             |
| Edit   Del | Research Proposal | Icon Square |             |
| Edit   Del | student           | Icon        |             |

Web Tabs

New What Is This?

No Web Tabs have been defined

Visualforce Tabs

New What Is This?

No Visualforce Tabs have been defined

Lightning Component Tabs

New What Is This?

No Lightning component tabs have been defined

Lightning Page Tabs

New What Is This?

No Lightning Page Tabs have been defined

college

college

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

college

New Custom Field

Help for this Page

Step 5: Add to page layouts

Step 5 of 6

Previous Save & New Save Cancel

| Field Label  | Total count      |
|--|------------------|
| Data Type  | Roll-Up Summary  |
| Field Name   | Total_count      |
| Description  |                  |
| Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout. |                  |
| To change the location of this field on the page, you will need to customize the page layout.  |                  |
| <input checked="" type="checkbox"/> Add Field  | Page Layout Name |
| <input checked="" type="checkbox"/>  | college Layout   |
| When finished, click Save & New to create more custom fields, or click Save if you are done.   |                  |
| Previous Save & New Save Cancel  |                  |



Setup

Home

Object Manager

college

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

college

New Custom Field

Help for this Page

Step 4 of 5

Step 4. Establish field-level security

Field Label: Total count

Data Type: Roll-Up Summary

Field Name: Total\_count

Description:

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

Setup

Home

Object Manager

college

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

college

New Custom Field

Help for this Page

Step 3 of 5

Step 3. Define the summary calculation

Select Object to Summarize

Master Object: college

Summarized Object: CDepartments

Select Roll-Up Type

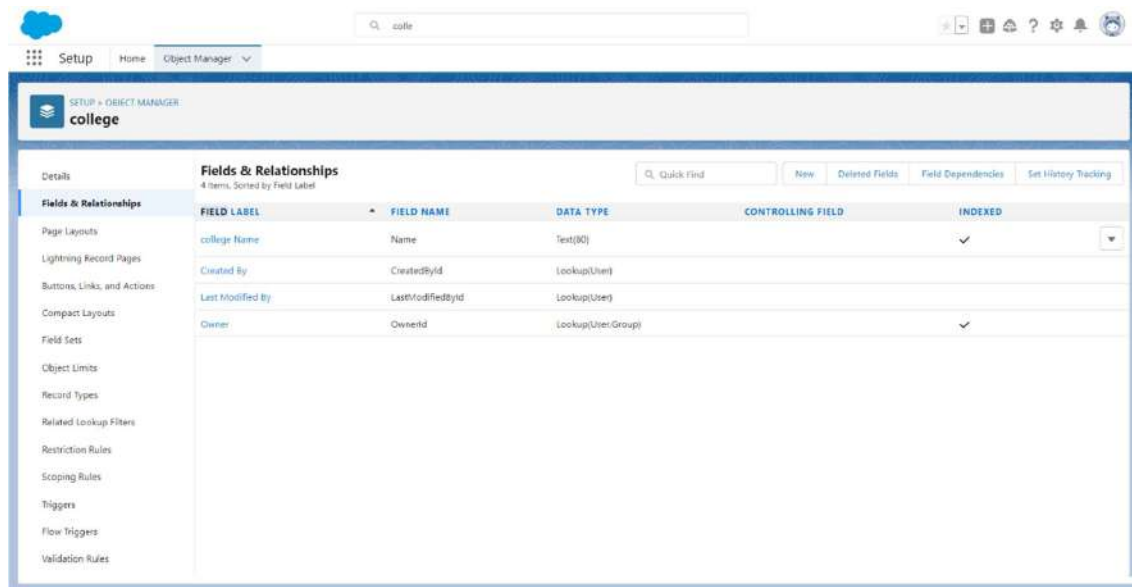
☒ COUNT☐ SUM☐ MIN☐ MAX

Field to Aggregate: --Select--

Filter Criteria

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





## 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. The left sidebar contains navigation links: Setup, Home, Object Manager, and a search bar. The main content area is titled 'New Custom Object Tab' and is part of the 'Tabs' setup. It is currently on 'Step 2 of 3: Add to Profiles'. Below the title, there is a dropdown menu for 'Tab Visibility' set to 'Default On'. A table lists various user profiles with a corresponding 'Tab Visibility' dropdown for each. At the bottom right, there are 'Previous', 'Next', and 'Cancel' buttons.

| Profile                                 | Tab Visibility |
|---|----------------|
| Analytics Cloud Integration User        | Default On     |
| Analytics Cloud Security User           | Default On     |
| Authenticated Website                   | Default On     |
| Authenticated Website                   | Default On     |
| Cloud Kicks Admin                       | Default On     |
| Contact Manager                         | Default On     |
| Cross Org Data Proxy User               | Default On     |
| Custom Marketing Profile                | Default On     |
| Custom Sales Profile                    | Default On     |
| Custom Support Profile                  | Default On     |
| customer                                | Default On     |
| Customer Community Login User           | Default On     |
| Customer Community Plus Login User      | Default On     |
| Customer Community Plus User            | Default On     |
| Customer Community User                 | Default On     |
| Customer Portal Manager Custom          | Default On     |
| Customer Portal Manager Standard        | Default On     |
| External Apps Login User                | Default On     |
| External Identity User                  | Default On     |
| Force.com - App Subscription User       | Default On     |
| Force.com - Free User                   | Default On     |
| Gold Partner User                       | Default On     |
| High Volume Customer Portal             | Default On     |
| High Volume Customer Portal User        | Default On     |
| Identity User                           | Default On     |
| Manager                                 | Default On     |
| Marketing User                          | Default On     |
| Minimum Access - Salesforce             | Default On     |
| Partner App Subscription User           | Default On     |
| Partner Community Login User            | Default On     |
| Partner Community User                  | Default On     |
| Read Only                               | Default On     |
| Research Manager                        | Default On     |
| Research Users                          | Default On     |
| Salesforce API Only System Integrations | Default On     |
| Sales User                              | Default On     |
| security profile                        | Default On     |
| Silver Partner User                     | Default On     |
| Solution Manager                        | Default On     |
| Standard Platform User                  | Default On     |
| Standard User                           | Default On     |
| System Administrator                    | Default On     |



Setup

Home

Object Manager

Search Setup

Setup

Setup Tabs

Help for this Page

Step 1 of 3

Step 1: Enter the Details

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

select an existing custom object or create a new custom object now

Object

C:Department

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

Setup

Home

Object Manager

Search Setup

Setup

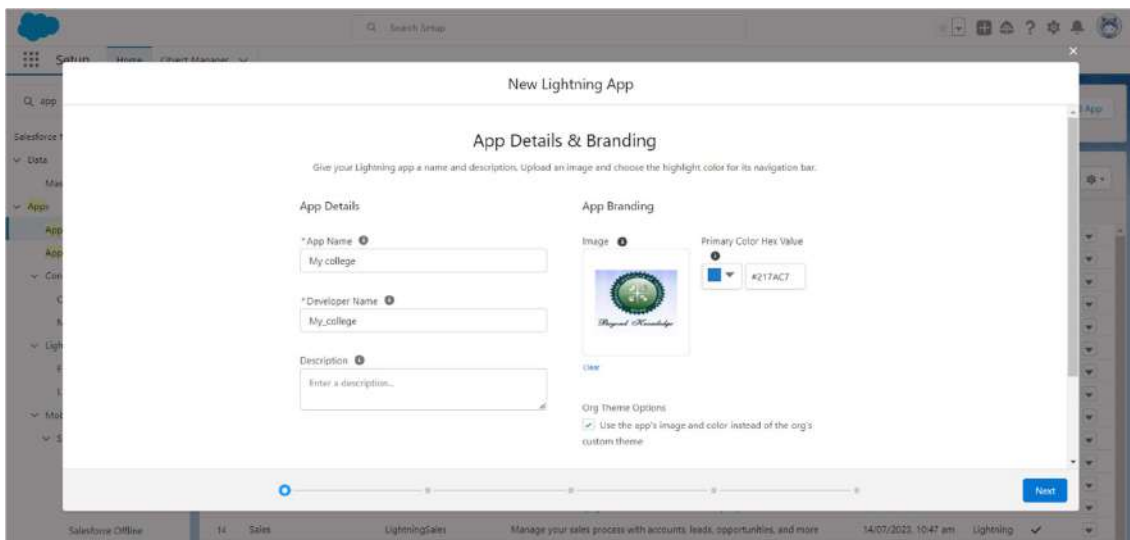
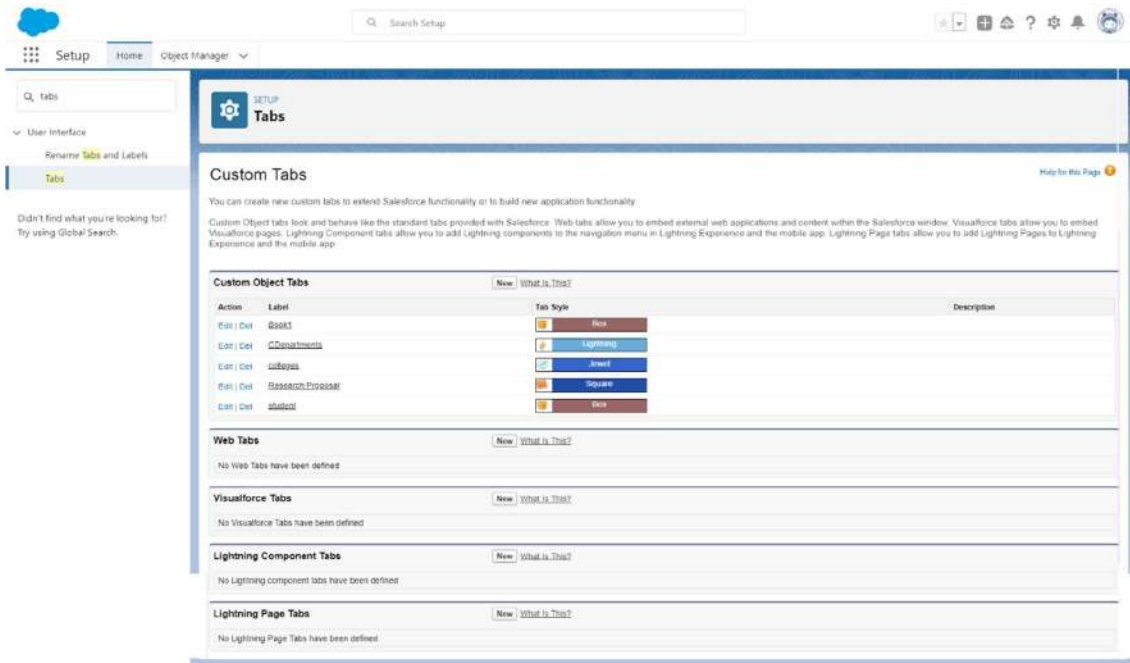
Lightning Experience App Manager

New Lightning App

New Connected App

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

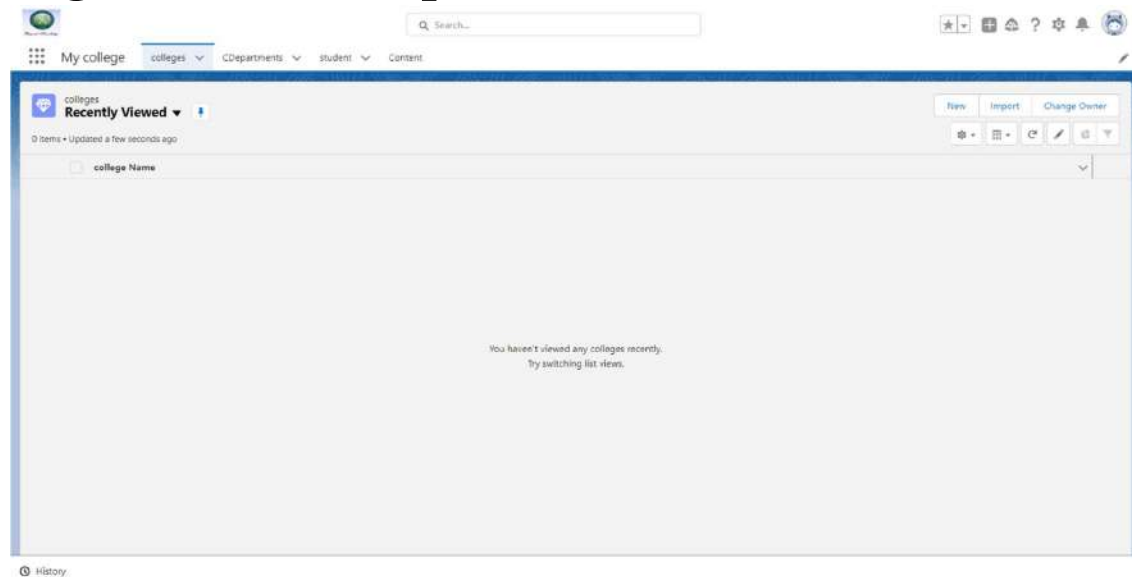
|    | App Name            | Developer Name           | Description   | Last Modified Date   | App       | Visi |
|----|---------------------|--------------------------|---|----------------------|-----------|------|
| 1  | All Tabs            | AllTabSet                |   | 14/07/2023, 10:47 am | Classic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



## Conclusion:

**Now, whenever you create or update a record in the "Department\_\_c" related to a "College\_\_c," the "TotalCount\_\_c" field on the "College\_\_c" will automatically update to show the total number of related records.**

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





app-d-der-ed.develop.lightning.force.com/lightning/u?college\_c/new?context=1&nooverride=1&useRecordTypeCheck=1&navigationLocation=LIST\_VIEW&uid=16961390...

My college colleges CDepartments student Content

Recently Viewed 0 items • Updated a minute ago

college Name

### New college

\* = Required Information

Information

\* college Name klor

phone 9087116402

Email klor@ac.in

Location

Latitude 90

Longitude 80

Owner krishna s

Cancel Save & New Save

History

My college colleges CDepartments student Content

CDepartments

Recently Viewed 1 item • Updated a few seconds ago

Department Name

|   |      |
|---|------|
| 1 | clor |
|---|------|

History

app-d-dee-ed.develop.lightning.force.com/lightning/o/CDepartment\_c/new?count=3&nooveride=1&useRecordTypeCheck=1&navigationLocation=LIST\_VIEW&uid=159...

My college

CDepartments

Recently Viewed

1 item • Updated a minute ago

Department Name

1

CDepartments

New CDepartment

to update, per another list view

\* Required Information

Information

\* Department Name

information technology

\* college

kiot

email

it@gmail.com

phone


007577568

hod name

arul








about


Cancel Save & New Save



My collegecollegesCDepartmentsstudentContent

Search...



**CDepartment**  
**information technology**

New ContactEditNew Opportunity

RelatedDetails

Department Name  
information technology

college  
kiot

email  
it@gmail.com


phone  
097577568

hod name  
arul

about








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


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



My collegecollegesCDepartmentsstudentContent

Search...



**college**  
**kiot**

New ContactEditNew Opportunity

RelatedDetails

college Name  
kiot

Total count  
1

phone  
9087116402


Email  
kiot@gmail.com

Location  
90, 90

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








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


Owner  
krishna s.



My collegecollegesCDepartmentsstudentContent

Search...



**CDepartment**  
**Recently Viewed**

NewImport


1 item • Updated a few seconds ago

Department Name

1

CDP

History



My college

colleges

CDepartments

student

Content

colleges

Recently Viewed

1 item • Updated a few seconds ago

college Name

1

kiot

New

Import

Change Owner

+


+

+

+

+

+



My college

colleges

CDepartments

student

Content

college

kiot

New Contact

Edit

New Opportunity

Related

Details

college Name

kiot

Total count

2

phone

9087116402

Email

kiot@gmail.com

Location

90, 80

Created By

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

Owner

krishna s.

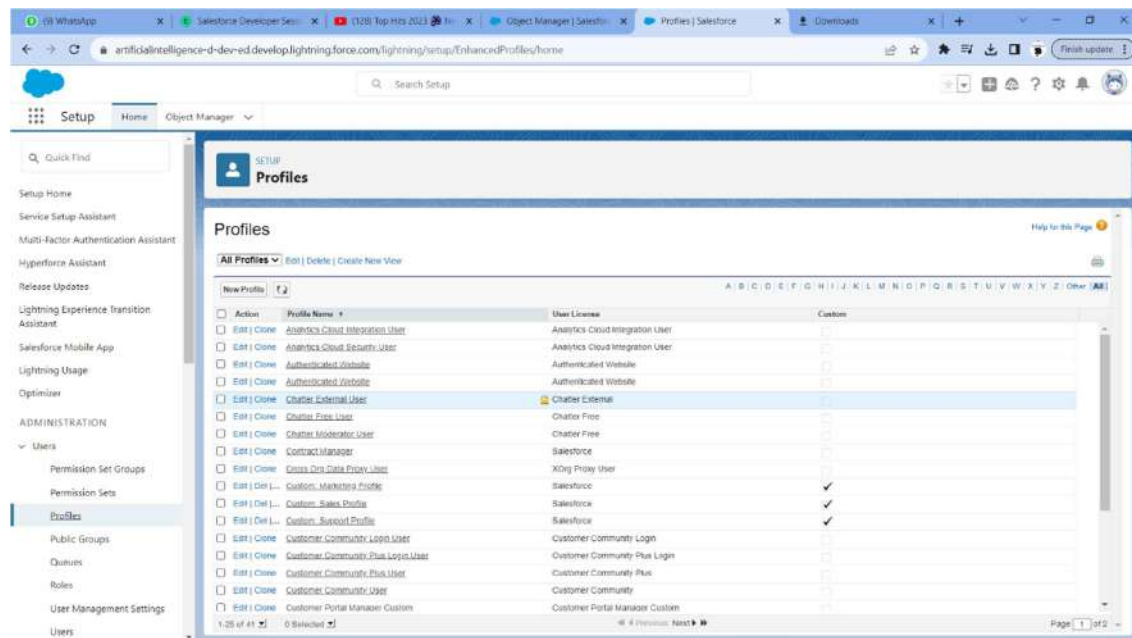
Last Modified By

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

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

Solution:

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



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

Help for this Page

All Profiles | Edit | Delete | Create New View

New Profile

| Action                                | Profile Name                           | User License           | Custom                              |
|---------------------------------------|--|------------------------|-------------------------------------|
| <input type="checkbox"/> Edit   Clone | Salesforce API Only System Integration | Salesforce Integration | <input type="checkbox"/>            |
| <input type="checkbox"/> Edit   Clone | 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 | 4 Profiles listed | Page 1 of 1

### Clone Profile

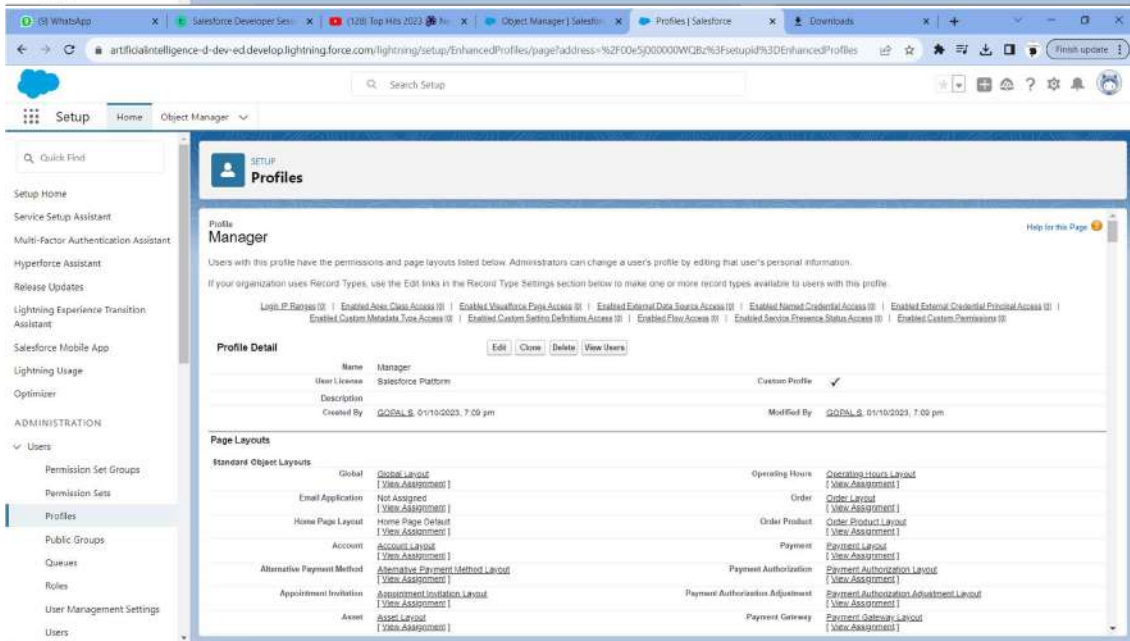
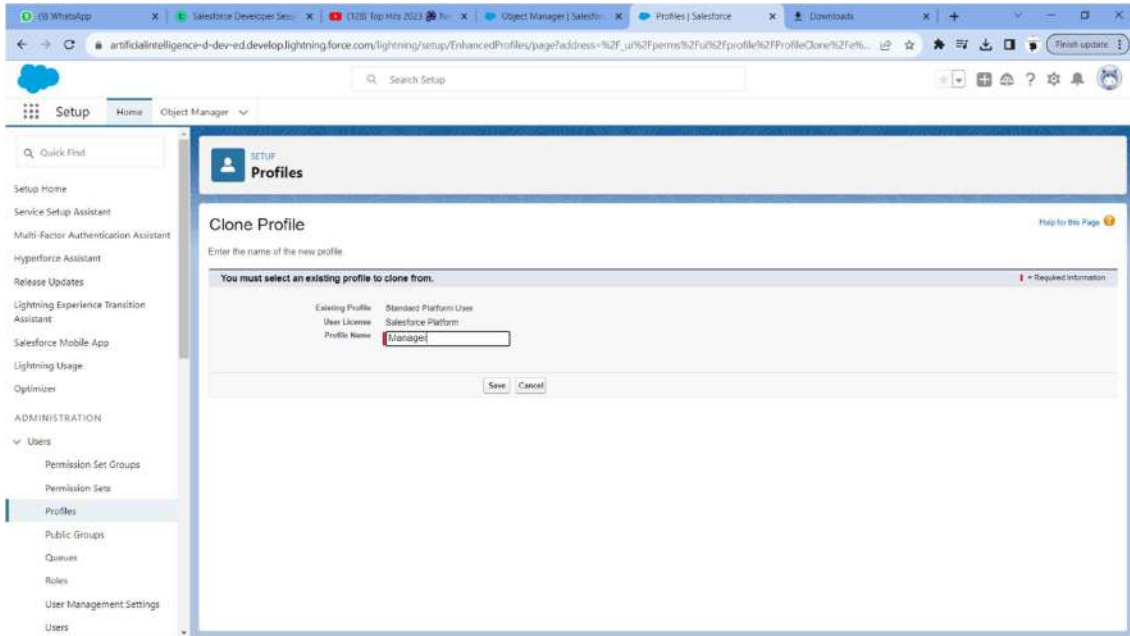
Help for this Page

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:

Save Cancel



artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5000000WCB%2F%3FrtURL%3D%252F00e50...

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

Manager

Set the permissions and page layouts for this profile.

**Profile Edit**

Name: Manager

User License: Salesforce Platform

Description:

Custom Profile: ☒

**Custom App Settings**

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

**Service Provider Access**

**Tab Settings**

☐ Override user's personal tab customizations

**Standard Tab Settings**

| How            | Default On                                  | Learning                         | Libraries                        | Lightning Bulk Solutions         |
|----------------|---|----------------------------------|----------------------------------|----------------------------------|
| Accounts       | <input checked="" type="radio"/> Default On | <input type="radio"/> Default On | <input type="radio"/> Tab Hidden | <input type="radio"/> Default On |
| Alert Settings | <input type="radio"/> Default On            |                                  |                                  |                                  |

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5000000WCB%2F%3FrtURL%3D%252F00e50...

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

|  | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
|--|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|--------------------------|--------------------------|
| Communication Subscription Channel Types | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Communication Subscription Consents      | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Communication Subscription Timings       | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Contacts                                 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Contact Point Addresses                  | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> |
| Contact Point Consents                   | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Contact Point Emails                     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

**Custom Object Permissions**

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



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

| Object                  | Read                                | Create                              | Edit                                | Delete                              | View All                            | Modify All                          |
|-------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| Contact Point Addresses | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Contact Point Consents  | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Contact Point Emails    | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

**Custom Object Permissions**

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

Obtain secret answers for password: ☐

Require a minimum 1 day password shadow: ☐

Don't immediately expire links in forgot password emails: ☐

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Hyperforce Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage Optimizer

ADMINISTRATION

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

### Profiles

| Object    | Read                     | Create                   | Edit                     | Delete                   | View All                 | Modify All               |
|-----------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Task      | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| customers | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

**Session Settings**

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: --None--

**Password Policies**

User passwords expire in: 90 days

Enforce password history: 3 passwords remembered

Minimum password length: 8

Password complexity requirement: Must include alpha and numeric characters

Password question requirement: Cannot contain password

Maximum invalid login attempts: 10

Lockout effective period: 15 minutes

Obtain secret answers for password: ☐

Require a minimum 1 day password shadow: ☐

Don't immediately expire links in forgot password emails: ☐

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Hyperforce Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

ADMINISTRATION

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

## Profiles

### Custom Object Permissions

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

Obtain secret answer for password: ☐

Require a minimum 1 day password: ☐

Don't immediately expire links in forgot password emails: ☐

## Users

### All Users

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

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

View: [All Users](#) | [Edit](#) | [Create New User](#)

[New User](#) | [Reset Password\(s\)](#) | [Add Multiple Users](#)

| Action                                | Full Name        | Alias    | Username                       | Role | Active                              | Profile                          |
|---------------------------------------|------------------|----------|--------------------------------|------|-------------------------------------|----------------------------------|
| <input type="checkbox"/> Edit   Login | Adrianne Chis    | adrianne | adrianne_chis@salesforce.com   |      | <input checked="" type="checkbox"/> | System Administrator             |
| <input type="checkbox"/> Edit   Login | Charles Ernest   | charles  | charles_ernest@salesforce.com  |      | <input checked="" type="checkbox"/> | Standard Platform User           |
| <input type="checkbox"/> Edit   Login | Elanora Amela    | elanora  | elanora_amela@salesforce.com   |      | <input checked="" type="checkbox"/> | System Administrator             |
| <input type="checkbox"/> Edit         | S. JCPRL         | SJ       | SJCPRL@salesforce.com          |      | <input checked="" type="checkbox"/> | System Administrator             |
| <input type="checkbox"/> Edit         | User Integration | user     | userintegration@salesforce.com |      | <input checked="" type="checkbox"/> | Analytics Cloud Integration User |
| <input type="checkbox"/> Edit         | User Security    | user     | usersecurity@salesforce.com    |      | <input checked="" type="checkbox"/> | Analytics Cloud Security User    |

[New User](#) | [Reset Password\(s\)](#) | [Add Multiple Users](#)

Setup Home Object Manager Users | Salesforce

Search Setup

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  
Data  
Email  
PLATFORM TOOLS  
App

### New User

Help for this Page

User Edit Save Save & New Cancel

General Information

First Name  
Last Name  
Alias  
Email  
Username  
Nickname  
Title  
Company  
Department  
Division

Role  
User License  
Profile  
Action  
Marketing User  
Offline User  
Knowledge User  
Flow User  
Service Chat User  
Site.com Contributor User  
Site.com Publisher User  
Web User  
Data.com User Type  
Data.com Monthly Addition Limit  
Accessibility Mode (Classic Only)  
High Contrast Palette on Charts  
Load Lightning Pages While Scrolling  
Debug Mode

Required Information

Setup Home Object Manager Users | Salesforce

Search Setup

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  
Data  
Email  
PLATFORM TOOLS  
App

### New User

Help for this Page

User Edit Save Save & New Cancel

General Information

First Name  
Last Name  
Alias  
Email  
Username  
Nickname  
Title  
Company  
Department  
Division

Role  
User License  
Profile  
Action  
Marketing User  
Offline User  
Knowledge User  
Flow User  
Service Chat User  
Site.com Contributor User  
Site.com Publisher User  
Web User  
Data.com User Type  
Data.com Monthly Addition Limit  
Accessibility Mode (Classic Only)  
High Contrast Palette on Charts  
Load Lightning Pages While Scrolling  
Debug Mode

Required Information

Setup Home Object Manager Users

Hyperforce Assistant  
Release Updates  
Lightning Experience Transition Assistant  
Salesforce Mobile App  
Lightning Usage Optimizer

ADMINISTRATION  
Users

User Detail

| Name  | sowmiya bala                                   | Role                                 |
|---|--|--------------------------------------|
| Alias   | sbiata   | User License                         |
| Email   | 2k216@kot.ac.in                                | Salesforce Platform                  |
| Username  | 2k216@kot.ac.in                                | Profile                              |
| Nickname  | User169567720295402616                         | Active                               |
| Title   | worker   | Marketing User                       |
| Company   | kot bank                                       | Offline User                         |
| Department  |  | Knowledge User                       |
| Division  |  | Flow User                            |
| Address   |  | Service Cloud User                   |
| Time Zone   | (GMT+05:30: India Standard Time (Asia/Kolkata) | Site.com Contributor User            |
| Locale  | English (India)                                | Site.com Publisher User              |
| Language  | English  | WDC User                             |
| Delegated Approver                                |  | Mobile Push Registrations            |
| Manager   |  | Data.com User Type                   |
| Receive Approval Request Emails                   | Only if I'm an approver                        | Accessibility Mode (Classic Only)    |
| Federation ID                                     |  | Debug Mode                           |
| App Registration: One-Time Password Authenticator |  | High-Contrast Palette on Charts      |
| App Registration: Salesforce Authenticator        |  | Load Lightning Pages While Scrolling |
|   |  | Salesforce CRM Context User          |

Mail Gmail

Compose

Inbox 5,216

Starred

Snoozed

Sent

Drafts 5

More

Labels

support@salesforce.com

7:13 PM (0 minutes ago)

1 of 6,486

salesforce

Welcome to Salesforce!

Click below to verify your account

Verify Account

To easily log in later, save this URL:

<https://artificialintelligence-d-dev-ed.develop.my.salesforce.com>


Username:

[2k216@kot.ac.in](mailto:2k216@kot.ac.in)

Again, welcome to Salesforce!

© Copyright 2000-2018 Salesforce.com, Inc. All rights reserved. Various trademarks held by their respective owners.

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



### Change Your Password

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

- 8 characters
- 1 letter
- 1 number

\* New Password

\* Confirm New Password

Security Question

In what city were you born?


\* Answer

Change Password

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

Login | Salesforce

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



Username

Password


Log In

☐ Remember me

[Forgot Your Password?](#)

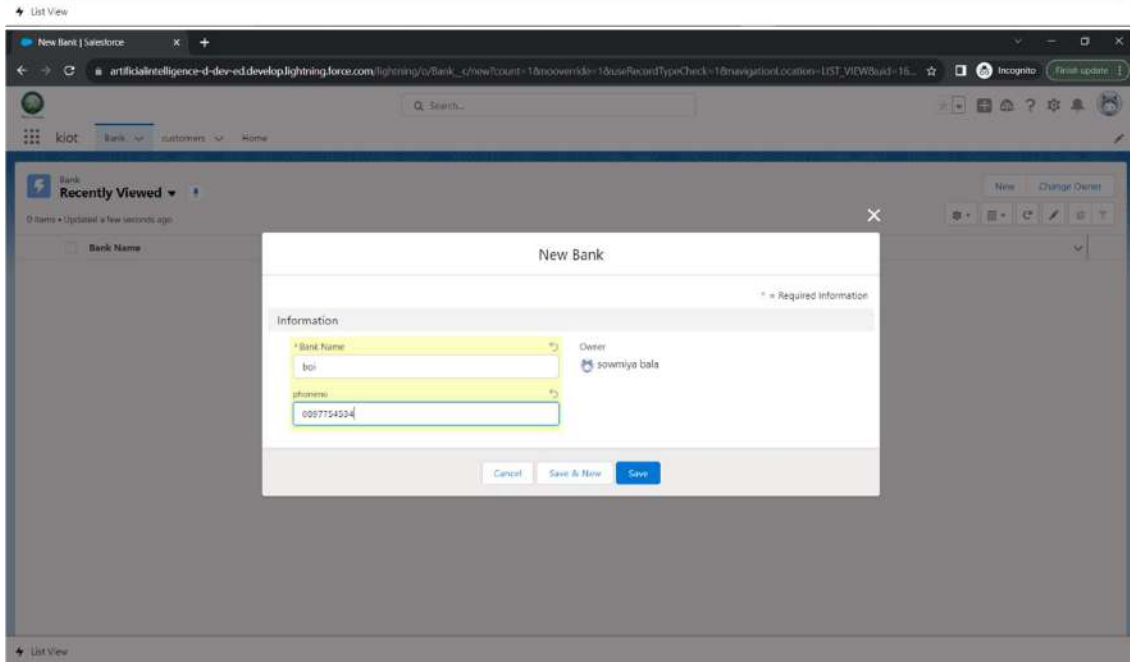
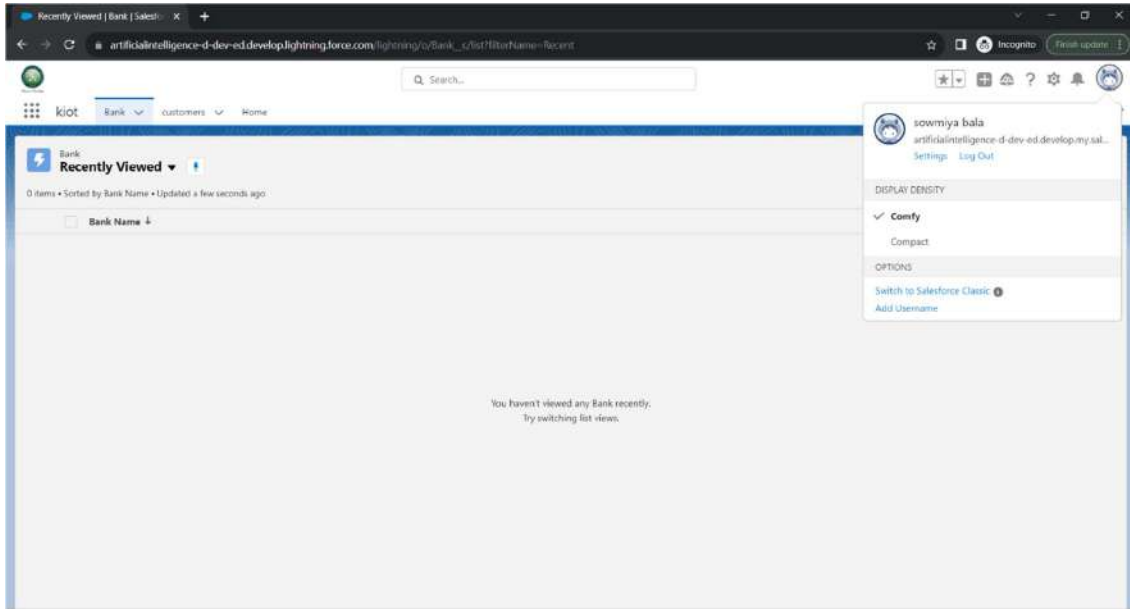
Join us for the future of trusted enterprise AI, streaming on Salesforce+.

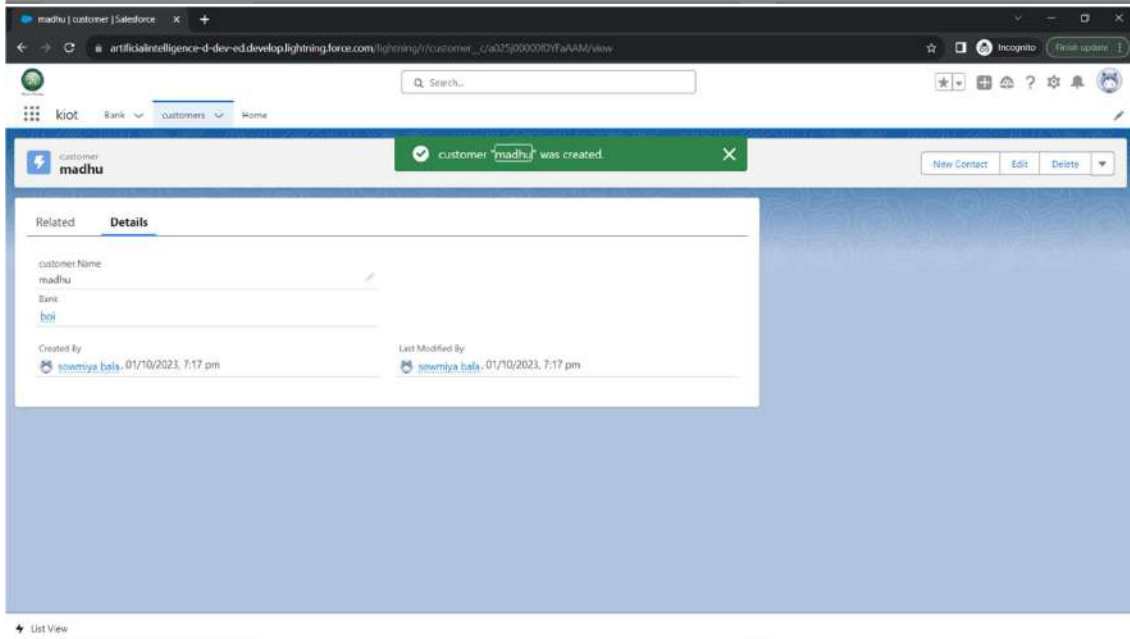
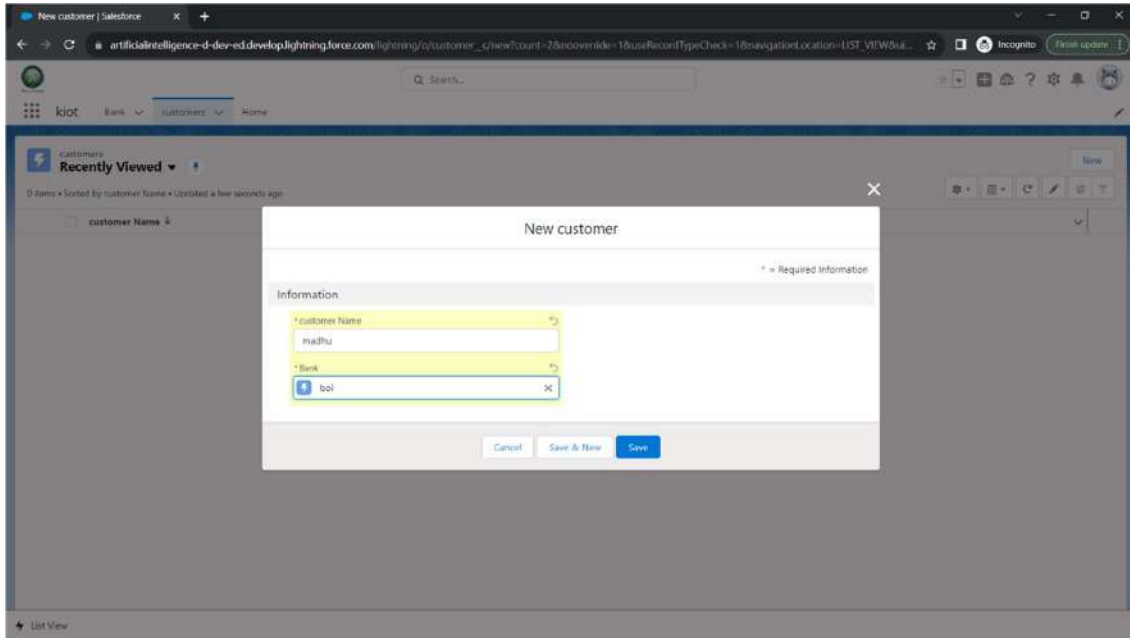
WATCH ON DEMAND



# AI Day

© 2023 Salesforce, Inc. All rights reserved.







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

Help for this Page

All Profiles | Edit | Create New View

| Action                                | Profile Name                           | User License           | Custom                              |
|---------------------------------------|--|------------------------|-------------------------------------|
| <input type="checkbox"/> Edit   Clone | Salesforce API Only System Integration | Salesforce Integration | <input type="checkbox"/>            |
| <input type="checkbox"/> Edit   Clone | 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 of 7 | 0 Selected | 4 Previous Next >

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

Help for this Page

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:



Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Hyperforce Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage Optimizer

ADMINISTRATION

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

### Profiles

Profile: salesmanage

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

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

Login IP 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 Settings 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: GQD&L.S. 01/10/2023, 7:19 pm

Modified By: GQD&L.S. 01/10/2023, 7:19 pm

**Page Layouts**

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

### 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                             |
|---------------------------------------|-------------------------------------|-------------------------------|-------------------------------------|
| Analytics Studio (standard__Insights) | <input type="checkbox"/>            | Platform (standard__Platform) | <input checked="" type="checkbox"/> |
| App Launcher (standard__AppLauncher)  | <input type="checkbox"/>            | WDC (standard__Work)          | <input type="checkbox"/>            |
| kit (blog)                            | <input checked="" type="checkbox"/> |                               |                                     |

**Service Provider Access**

**Tab Settings**

☐ Override user's personal tab customizations

**Standard Tab Settings**

Name: Default On

Learning: ☒ Default On

Resonance: ☒ Default On

Setup Profiles

Custom Object Permissions

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

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: --None--

Password Policies

User passwords expire in: 90 days

Enforce password history: 3 passwords remembered

Minimum password length: 8

Password complexity requirement: Must include alpha and numeric characters

Password question requirement: Cannot contain password

Maximum invalid login attempts: 10

Lockout effective period: 15 minutes

Obscure secret answer for password resets: ☐

Require a minimum 1 day password lifetime: ☐

Don't immediately expire links in forgot password email: ☐

Setup Profiles

Custom Object Permissions

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

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: --None--

Password Policies

User passwords expire in: 90 days

Enforce password history: 3 passwords remembered

Minimum password length: 8

Password complexity requirement: Must include alpha and numeric characters

Password question requirement: Cannot contain password

Maximum invalid login attempts: 10

Lockout effective period: 15 minutes

Obscure secret answer for password resets: ☐

Require a minimum 1 day password lifetime: ☐

Don't immediately expire links in forgot password email: ☐

Save Save & New Cancel

Setup Home Object Manager

Search Setup

Users

New User

User Edit Save Save & New Cancel

General Information

First Name Last Name Alias Email Username Nickname Title Company Department Division

Role User License Profile Action Marketing User Offline User Knowledge User Flow User Service Cloud User Site.com Contributor User Site.com Publisher User WEC User Data.com User Type Data.com Monthly Addition Limit Accessibility Mode (Classic Only) High Contrast Palette on Charts Load Lightning Pages While Scrolling Debug Mode

Required Information

Setup Home Object Manager

Search Setup

Users

New User

User Edit Save Save & New Cancel

General Information

First Name madhu Last Name h Alias mb Email 2k20cse17b@knot.ac.in Username 2k20cse17b@knot.ac.in Nickname User16961684242854192 Title worker Company Knot Bank Department Sales Division

Role <None Specified> User License Salesforce Platform Profile Salesmanage Action Marketing User Offline User Knowledge User Flow User Service Cloud User Site.com Contributor User Site.com Publisher User WEC User Data.com User Type Data.com Monthly Addition Limit Accessibility Mode (Classic Only) High Contrast Palette on Charts Load Lightning Pages While Scrolling Debug Mode

Required Information

Setup Home Object Manager

Search Setup

user

Users

- Permission Set Groups
- Permission Sets
- Profiles
- Public Groups
- Quicket
- Roles
- Use Management Settings
- Users
- Feature Settings
  - Data.com
    - Prospector Users
  - Service
    - Embedded Service
      - Messaging for Its-App and Web User Verification
  - User Interface
    - Action Link Templates
    - Actions & Recommendations
    - App Menu

Users

Mailing Address

Street

City

Zip/Postal Code

State/Province

Country

Single Sign On Information

Federation ID

Locale Settings

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

Locale English (India)

Language English

Approver Settings

Delegated Approver

Manager

Receive Approval Request Emails Only if I am an approver

☒ Generate new password and notify user immediately

Save Save & New Cancel

Setup Home Object Manager

Search Setup

user

Users

- Permission Set Groups
- Permission Sets
- Profiles
- Public Groups
- Quicket
- Roles
- Use Management Settings
- Users
- Feature Settings
  - Data.com
    - Prospector Users
  - Service
    - Embedded Service
      - Messaging for Its-App and Web User Verification
  - User Interface
    - Action Link Templates
    - Actions & Recommendations
    - App Menu

Users

Mailing Address

Street 4794 aryanpalayam, uthamastapuram

City SALEM

Zip/Postal Code 636308

State/Province TAMIL NADU

Country

Single Sign On Information

Federation ID

Locale Settings

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

Locale English (India)

Language English

Approver Settings

Delegated Approver

Manager

Receive Approval Request Emails Only if I am an approver

☒ Generate new password and notify user immediately

Save Save & New Cancel



Change Your Password | Salesforce

artificialintelligence-d-dev-ed.develop.my.salesforce.com / ui/system/security/ChangePassword?urlURL=%2Fhome%2Fhome.jsp&fromFrontdoor=1&starturl=ChangePa...

Incognito (3) Finish update

**salesforce**

### Change Your Password

Enter a new password for 2k20cst@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 | Sales | X

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/o/Bank\_c?listFilterName=Recent

Incognito (3) Finish update

Search...

kiot Bank customers Home

Bank

Recently Viewed

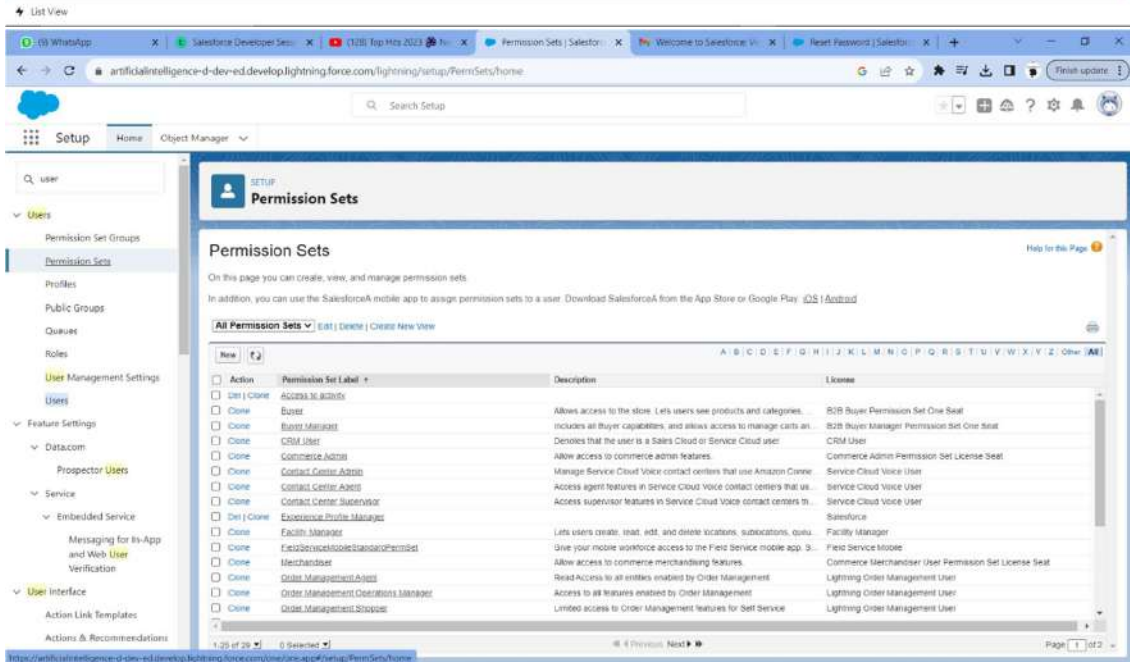
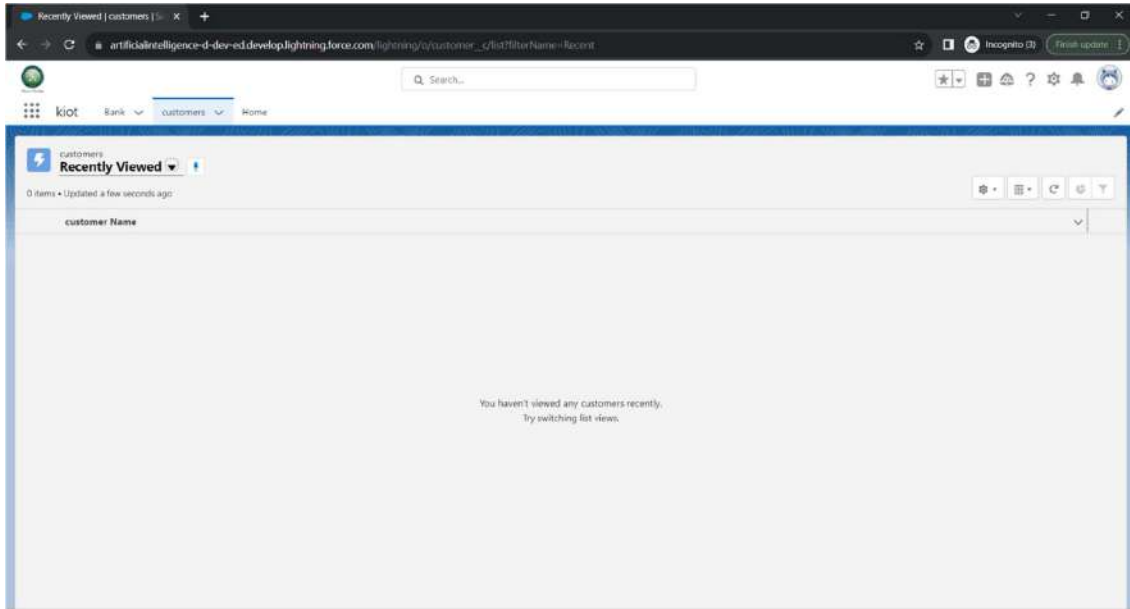
0 items • Updated a few seconds ago

Bank Name

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

List View





## Step 2:

### Permission Sets:

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

### Object-Level Security:

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

### Record-Level Security:

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

### Ownership:



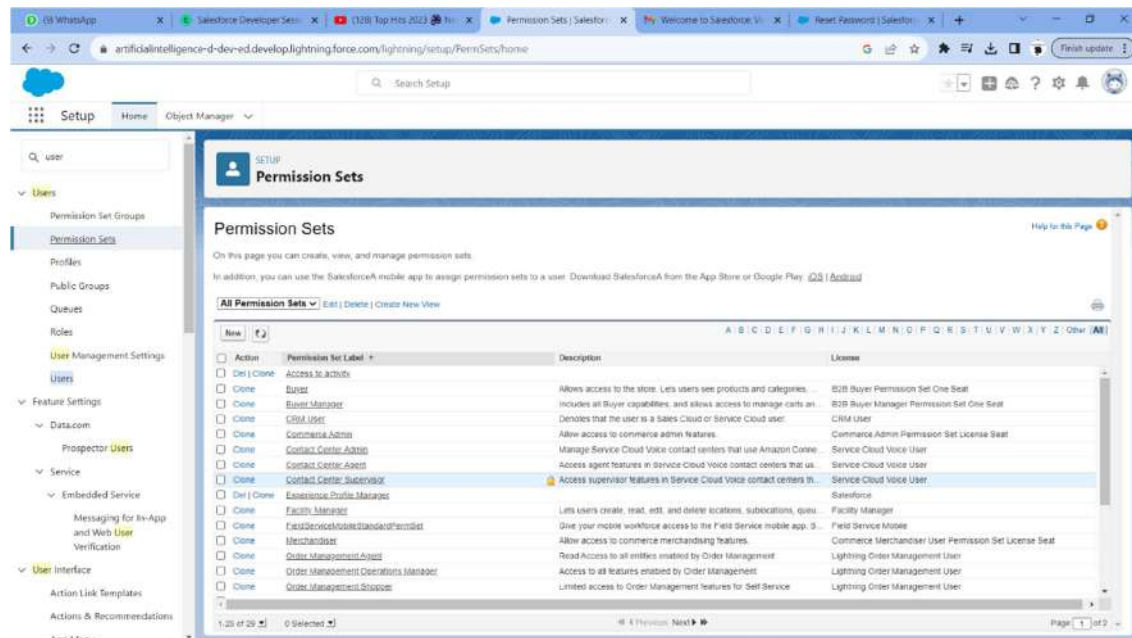
- Ensure that the Account records are owned by the respective users, with User A owning their records and User B owning their records.

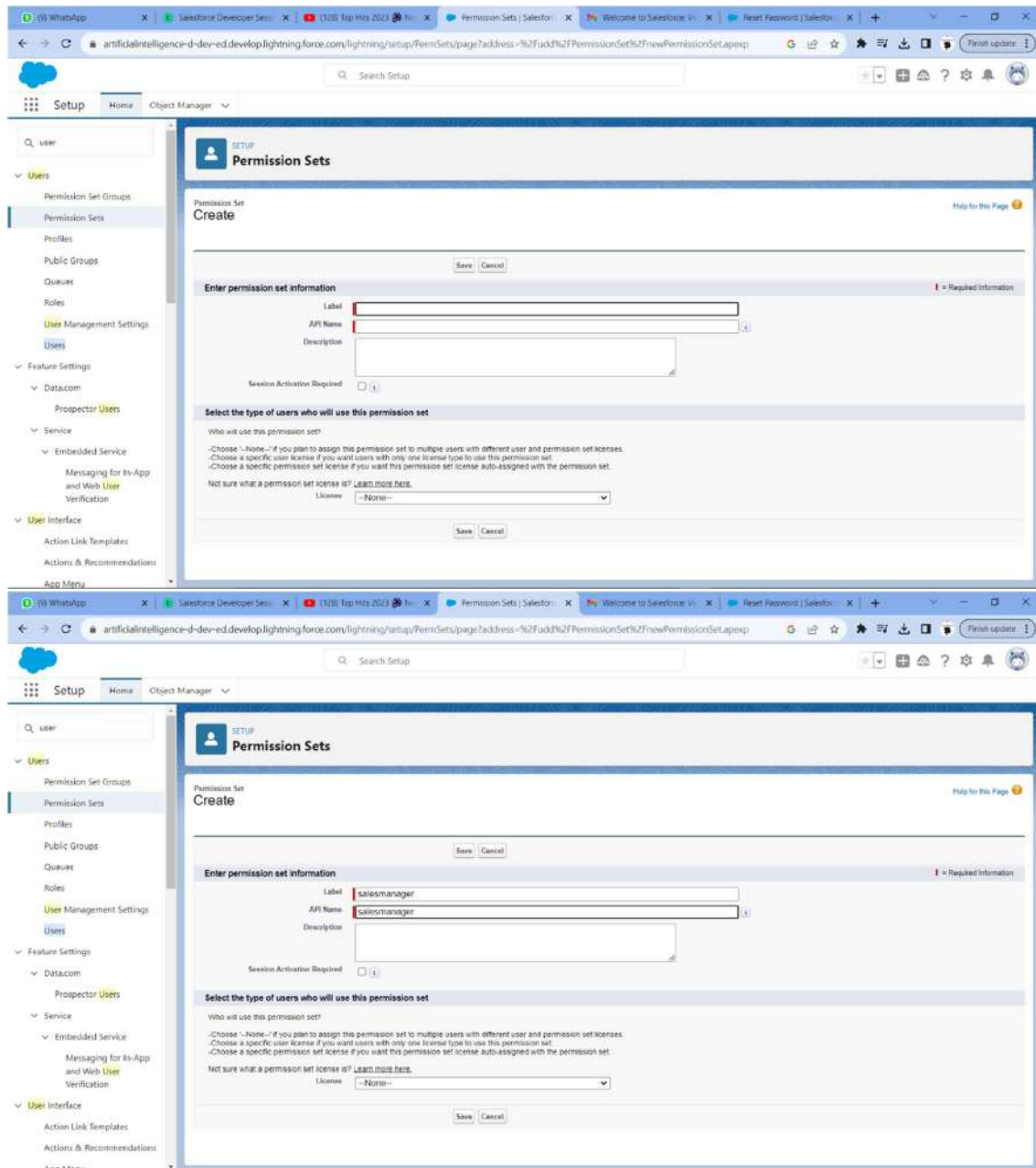
## Organization-Wide Defaults:

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

## Testing:

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





Setup Home Object Manager

user

Users

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

Feature Settings

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

User Interface

- Action Link Templates
- Actions & Recommendations
- App Menu

Permission Set

salesmanager

Find Settings Clone Delete Edit Properties Manage Assignments

Permission Set Overview

| Description                  | API Name                     |
|------------------------------|------------------------------|
| License                      | salesmanager                 |
| Session Activation Required  | Namespace Prefix             |
| Last Modified By             | Created By                   |
| GOPAL S. 01/19/2023, 7:29 pm | GOPAL S. 01/19/2023, 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

Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform

Learn More

Setup Home Object Manager

user

Users

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

Feature Settings

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

User Interface

- Action Link Templates
- Actions & Recommendations
- App Menu

Permission Set

salesmanager

Find Settings Clone Delete Edit Properties Manage Assignments

Permission Set Overview

Object Settings

| Object Name                       | Object Permissions | Total Fields | Tab Settings |
|-----------------------------------|--------------------|--------------|--------------|
| ACCOUNTS                          | No Access          | 42           | —            |
| AI Insight Reasons                | No Access          | —            | —            |
| AI Record Insights                | No Access          | —            | —            |
| Alternative Payment Methods       | No Access          | 27           | —            |
| API Anonymous Event Stores        | No Access          | 14           | —            |
| App Analytics Query Results       | No Access          | —            | —            |
| Application Usage Assessments     | No Access          | —            | —            |
| Appointment Categories            | No Access          | 3            | —            |
| Appointment Invitations           | No Access          | 17           | —            |
| Appointment Invites               | —                  | 4            | —            |
| Appointment Schedule Arrangements | 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 Data Periods                | No Access          | 11           | —            |

Setup Home Object Manager

user

Users

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

Feature Settings

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

User Interface

- Action Link Templates
- Actions & Recommendations

Permission Set

salesmanager

Find Settings Clone Delete Edit Properties Manage Assignments

Permission Set Overview Object Settings Bank

Bank

Tab Settings

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

Object Permissions

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

Field Permissions

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

Setup Home Object Manager

user

Users

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

Feature Settings

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

User Interface

- Action Link Templates
- Actions & Recommendations
- App Menu

Permission Set

salesmanager

Find Settings Clone Delete Edit Properties Manage Assignments

Permission Set Overview Object Settings Bank

Bank

Save Cancel

Tab Settings

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

Object Permissions

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

Field Permissions

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

Setup Home Object Manager

Search Setup

user

Users

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

Feature Settings

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

User Interface

- Action Link Templates
- Actions & Recommendations
- App Menu

salesmanager

### Current Assignments

No assignments defined.

Add Assignment

Setup Home Object Manager

Search Setup

user

Users

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

Feature Settings

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

User Interface

- Action Link Templates
- Actions & Recommendations
- App Menu

### Select Users to Assign

All Users

1 item selected

Search this list...

|                                     | Full Name ↑      | All...  | Username  | Role | Act...                              | Profile                           |
|-------------------------------------|------------------|---------|---|------|-------------------------------------|-----------------------------------|
| <input type="checkbox"/>            | Amelia Elington  | aelli   | amelia.elington.146kcpoodh.dicwpdcu4wh.hbdwmvwhq.aguctpr1delv@gmail.com |      | <input checked="" type="checkbox"/> | Force.com - App Subscription User |
| <input type="checkbox"/>            | Chatter Expert   | Chatter | chatty0045j0000bckkxah.t09hempqjke@chatter.salesforce.com               |      | <input checked="" type="checkbox"/> | Chatter First User                |
| <input type="checkbox"/>            | Diya Adams       | dadam   | test_diya_jee-felljybtwkt.rugrgskpx.3gikofozzems.M43kuzefmne@gmail.com  |      | <input checked="" type="checkbox"/> | UMS User                          |
| <input type="checkbox"/>            | GPAL S           | GS      | kio629@gmail.com  |      | <input checked="" type="checkbox"/> | System Administrator              |
| <input type="checkbox"/>            | Integration User | integ   | integration@0045j0000bckkxah.com  |      | <input checked="" type="checkbox"/> | Analytics Cloud Integration User  |
| <input checked="" type="checkbox"/> | mudhu In         | mb      | 2k20csh@kio.ac.in   |      | <input checked="" type="checkbox"/> | salesmanager                      |
| <input type="checkbox"/>            | Security User    | sec     | insightssecurity@0045j0000bckkxah.com                                   |      | <input checked="" type="checkbox"/> | Analytics Cloud Security User     |
| <input type="checkbox"/>            | sreemya bala     | sbala   | 2k21n@kio.ac.in   |      | <input checked="" type="checkbox"/> | Manager                           |

Cancel Assign

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

Service

Embedded Service

Messaging for In-App and Web User Verification

User Interface

Action Link Templates

Actions & Recommendations

App Menu

### Select an Expiration Option for Assigned Users

☒ No expiration date

☐ Specify the expiration date

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

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

Service

Embedded Service

Messaging for In-App and Web User Verification

User Interface

Action Link Templates

Actions & Recommendations

App Menu

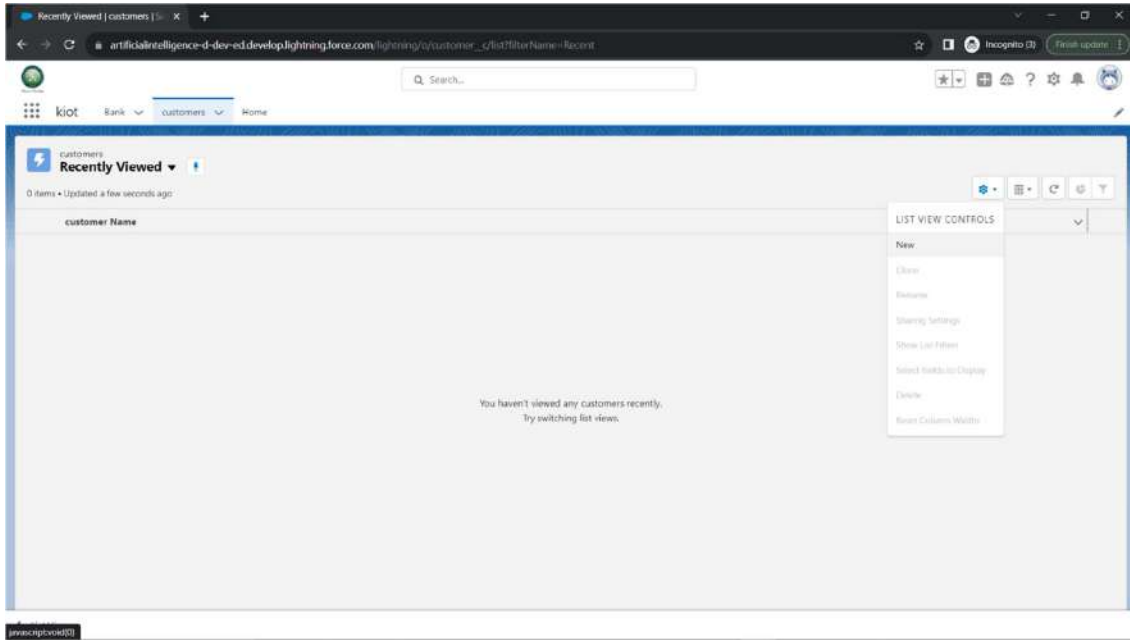
### PERMISSION SET SALESMAN

1 assignments were successful

### Assignment Summary

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

Done



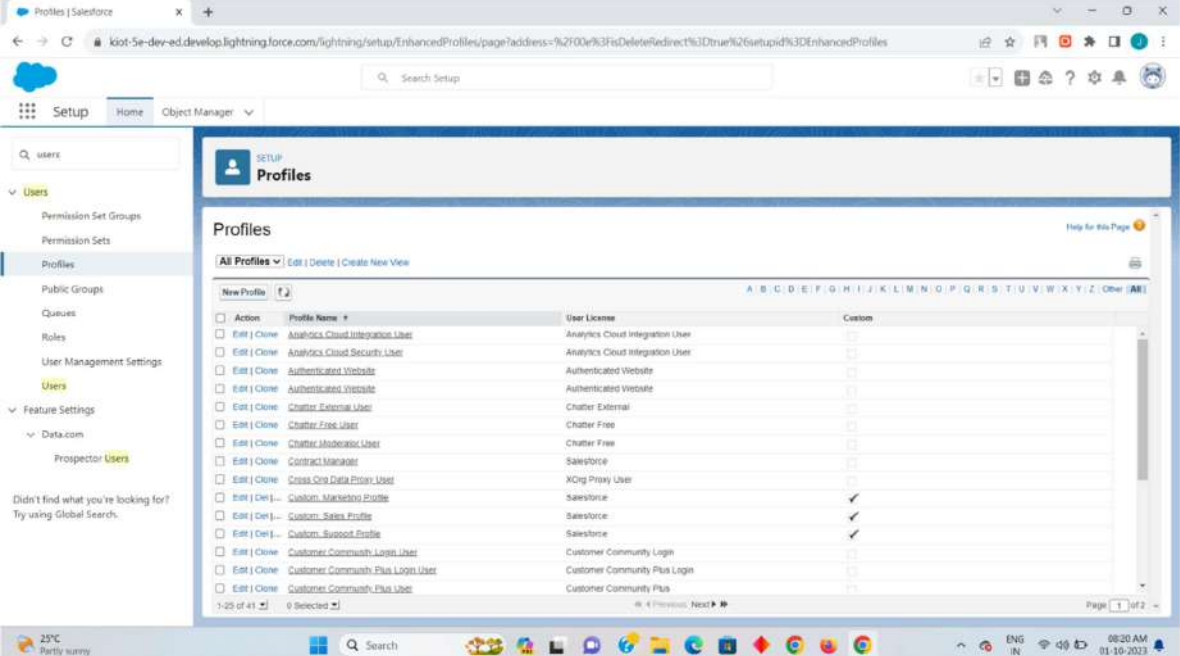


3. . Suppose there are 2 Users and they are having Create, Read, Edit access on Account Object with the same profile but we want to open up the access for one user to delete how will you implement the Security setting.

Solution:

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

Setup-quick search[profile]



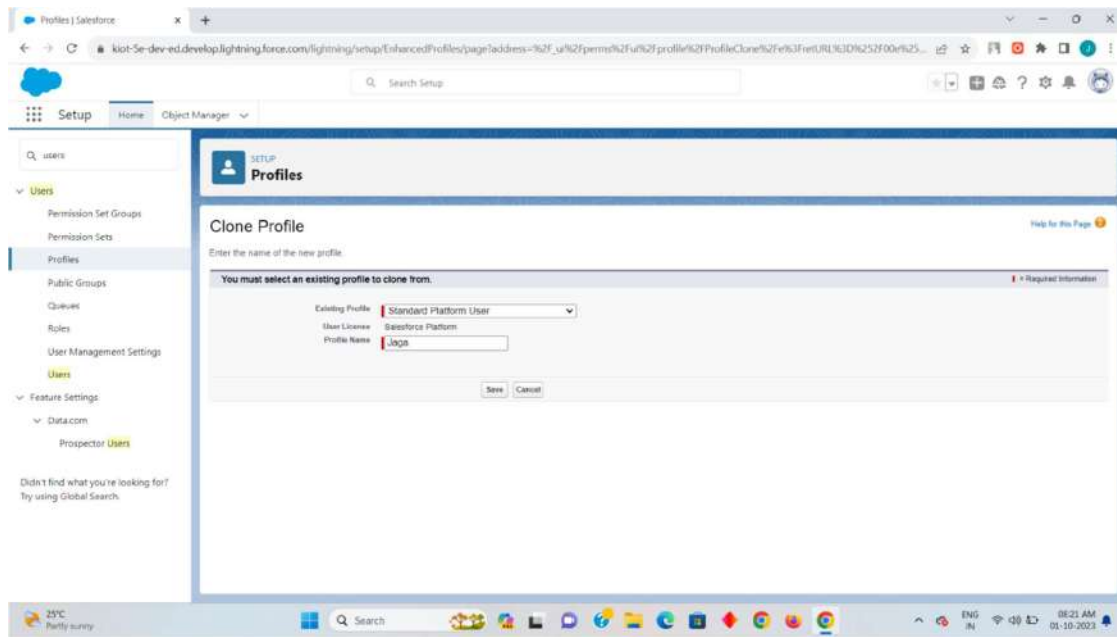
The screenshot shows the Salesforce Setup interface for Profiles. The left sidebar contains navigation links: Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Quizzes, Roles, and User Management Settings. The main content area is titled 'Profiles' and includes a search bar and a table of profiles. The table has columns for Action, Profile Name, User License, and Custom. The 'Custom' column has checkboxes for various permissions. The 'User License' column lists various user licenses. The 'Profile Name' column lists various profiles. The 'Action' column has links for 'Edit' and 'Clone' for each profile. The table is sorted by 'Profile Name' and shows 41 profiles in total. The bottom of the screen shows a Windows taskbar with the date and time as 08:20 AM on 01-10-2023.

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



Step 2:

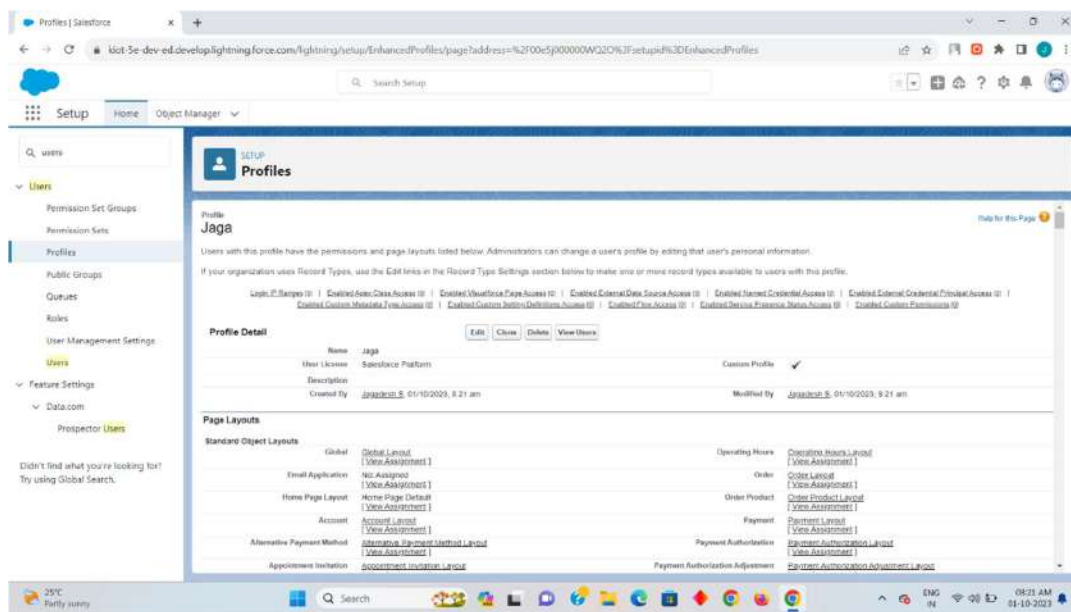
Click on the new to create a new profile along with the label and Api



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

## Step 3:

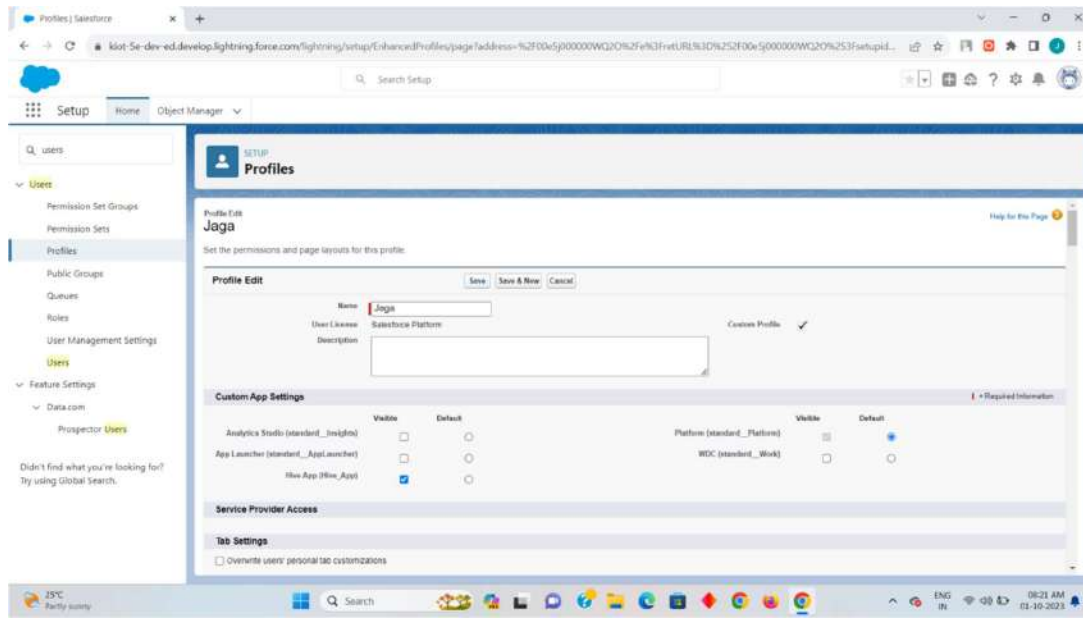
Now click on the edit and scroll down to custom object settings and enable the read,create,edit and view options. After that click on save.



The screenshot shows the Salesforce Setup interface for the 'Profiles' page. The left sidebar contains navigation links for 'Users', 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Outposts', 'Rules', 'User Management Settings', 'Users', 'Feature Settings', 'Data.com', and 'Prospector Users'. The main content area is titled 'Profiles' and shows the details for the 'Jaga' profile. The profile is a 'Salesforce Platform' profile, created by 'jagadev S.' on 01/10/2023 at 9:21 am. The 'Page Layouts' section displays a table of standard object layouts for the 'Jaga' profile.

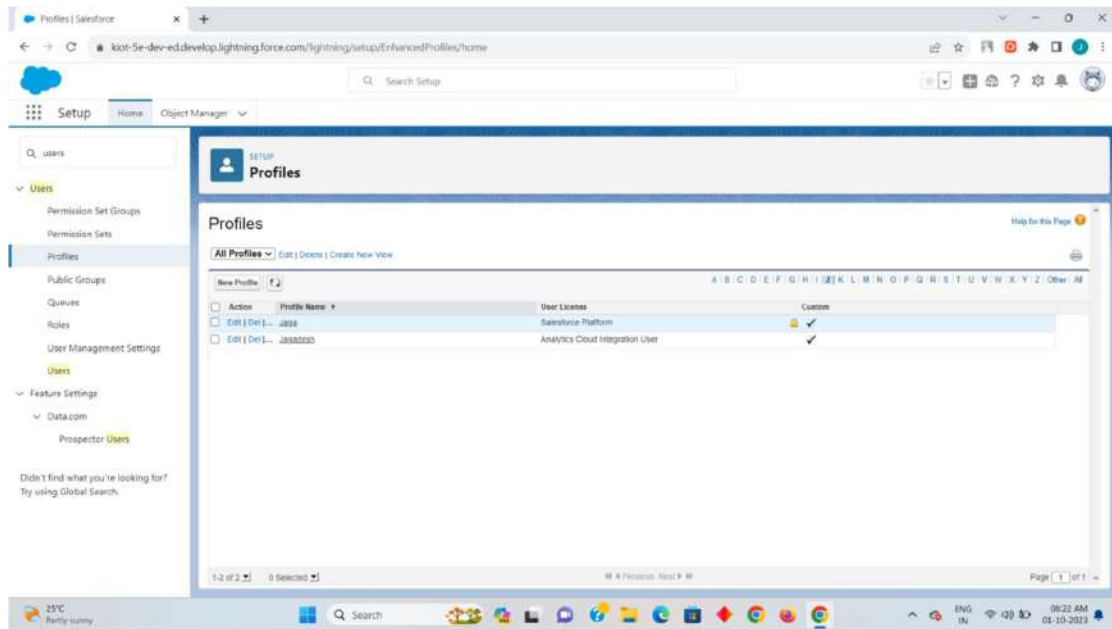
| Standard Object Layouts    | Global  | Operating Hours                          | Order  |
|----------------------------|---|--|--|
| Email Application          | Global Layout [View Assignment]                     | Operating Hours Layout [View Assignment] | Order Layout [View Assignment]        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





## Step 4

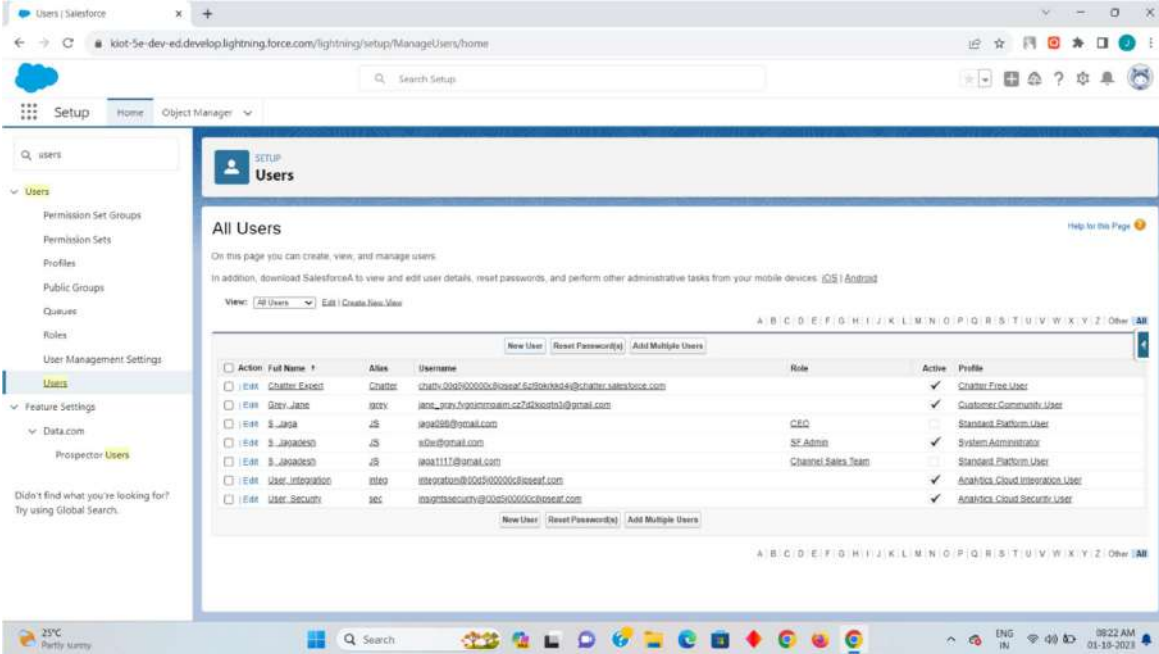
Now you can preview your created profile on the profile option here my profile name jaga has been created with the access of read,create,edit along with view on it



## Step 5:

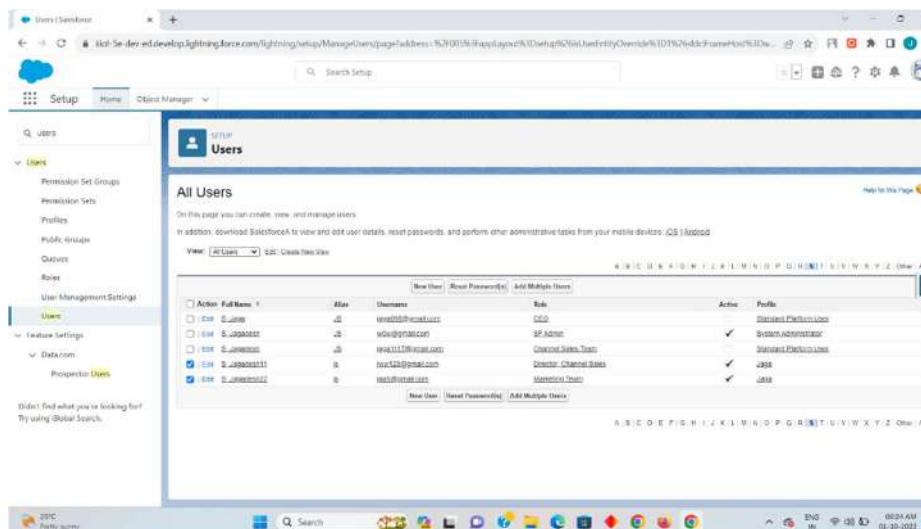
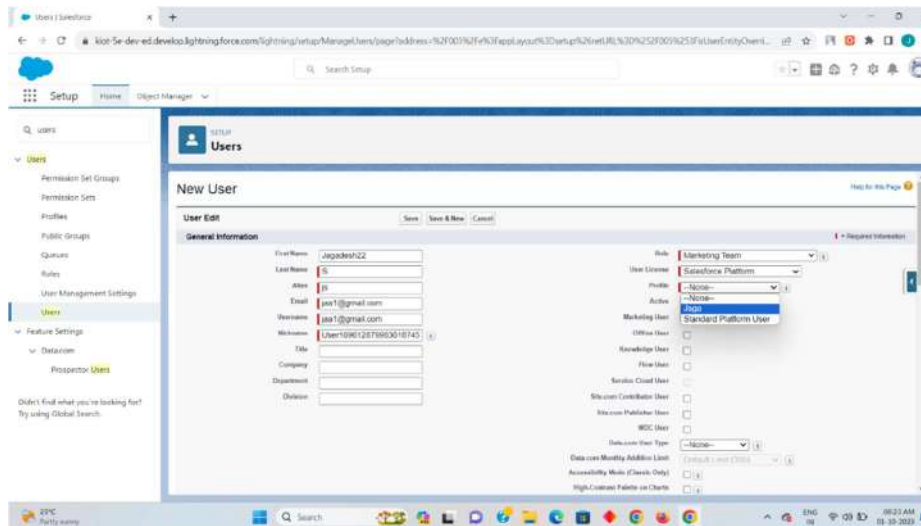
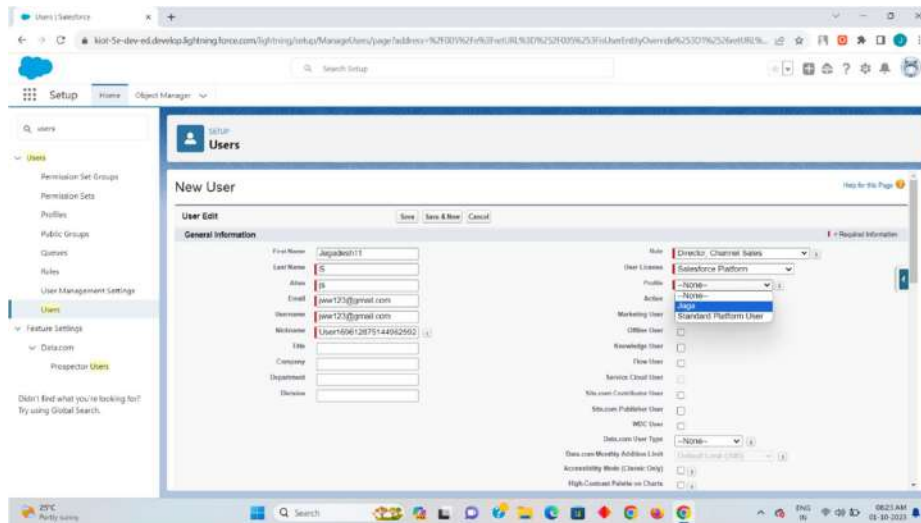
Now create two users by enter into the Setup-quick search[user] and then click on new user after clicking that you need to create two user along

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 create click on save.



The screenshot shows the Salesforce 'Users' management page. The left sidebar contains navigation links for Setup, Home, Object Manager, and a search bar. The main content area is titled 'All Users' and includes a table of existing users. The table has columns for Action, Full Name, Alias, Username, Role, Active status, and Profile. Below the table are buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'.

| Action                   | Full Name        | Alias   | Username  | Role               | Active                              | Profile                          |
|--------------------------|------------------|---------|---|--------------------|-------------------------------------|----------------------------------|
| <input type="checkbox"/> | Chatter Expert   | Chatter | chatter.00000000000000000000000000000000@chatter.salesforce.com |                    | <input checked="" type="checkbox"/> | Chatter Free User                |
| <input type="checkbox"/> | Guest Jane       | Guest   | jane_guest@mycompany.co.uk@salesforce.com                       |                    | <input checked="" type="checkbox"/> | Customer Community User          |
| <input type="checkbox"/> | J. Jaga          | JJ      | jaga0000@gmail.com  | CEO                | <input checked="" type="checkbox"/> | Standard Platform User           |
| <input type="checkbox"/> | J. Jaga0000      | JJ      | jaga0000@gmail.com  | SF Admin           | <input checked="" type="checkbox"/> | System Administrator             |
| <input type="checkbox"/> | J. Jaga0000      | JJ      | jaga1111@gmail.com  | Channel Sales Team | <input checked="" type="checkbox"/> | Standard Platform User           |
| <input type="checkbox"/> | User Integration | integ   | integration@00000000000000000000000000000000@salesforce.com     |                    | <input checked="" type="checkbox"/> | Analytics Cloud Integration User |
| <input type="checkbox"/> | User Security    | sec     | security@00000000000000000000000000000000@salesforce.com        |                    | <input checked="" type="checkbox"/> | Analytics Cloud Security User    |



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

Search Setup

Setup Home Object Manager

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

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

## 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.

All Permission Sets | Edit | Delete | Create New View

| New                      | 1 2   | 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 |   |  |
|--------------------------|-------|---|---|--|
| <input type="checkbox"/> | Admin | Permission Set Label: Admin                                   | Description: Admin access to the store. Lets users see products and categories, includes all RiverCard labels, and allows access to manage carts and orders that the user is a Sales Cloud or Service Cloud user. | License: B2B Buyer Permission Set One Seat             |
| <input type="checkbox"/> | Clone | Admin   |   | B2B Buyer Manager Permission Set One Seat              |
| <input type="checkbox"/> | Clone | Admin   |   | CRM User   |
| <input type="checkbox"/> | Clone | Admin   |   | Commerce Admin Permission Set License Seat             |
| <input type="checkbox"/> | Clone | Admin   |   | Service Cloud Voice User                               |
| <input type="checkbox"/> | Clone | Admin   |   | Service Cloud Voice User                               |
| <input type="checkbox"/> | Clone | Admin   |   | Service Cloud Voice User                               |
| <input type="checkbox"/> | Clone | Admin   |   | Salesforce   |
| <input type="checkbox"/> | Clone | Admin   |   | Field Manager  |
| <input type="checkbox"/> | Clone | Admin   |   | Field Service Mobile                                   |
| <input type="checkbox"/> | Clone | Admin   |   | Commerce Merchandiser User Permission Set License Seat |
| <input type="checkbox"/> | Clone | Admin   |   | Lightning Order Management User                        |
| <input type="checkbox"/> | Clone | Admin   |   | Lightning Order Management User                        |

1-23 of 30 | 4 Profiles Next

Page 1 of 2

Permission Sets | Salesforce

Search Setup

Setup Home Object Manager

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

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

## Permission Set Create

Enter permission set information

Label: permission12

API Name: permission12

Description:

Session Activation Required: ☐

Select the type of users who will use this permission set

Who will use this permission set?

-Choose -None- if you plan to assign this permission set to multiple users with different user and permission set licenses.

-Choose a specific user license if you want users with only one license type to use this permission set.

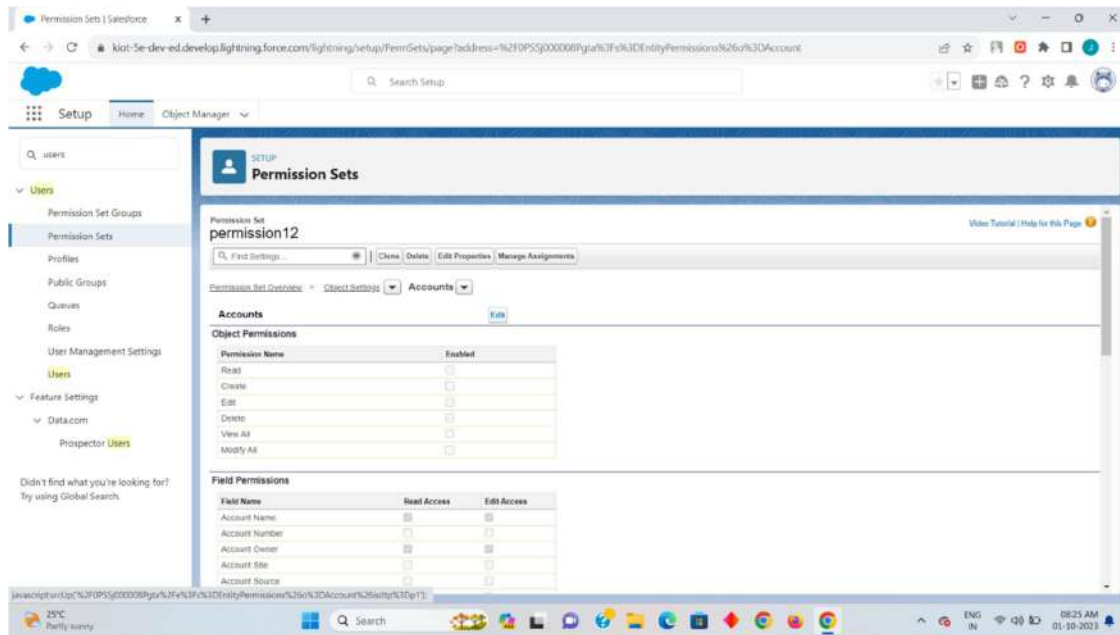
-Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.

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

License: -None-

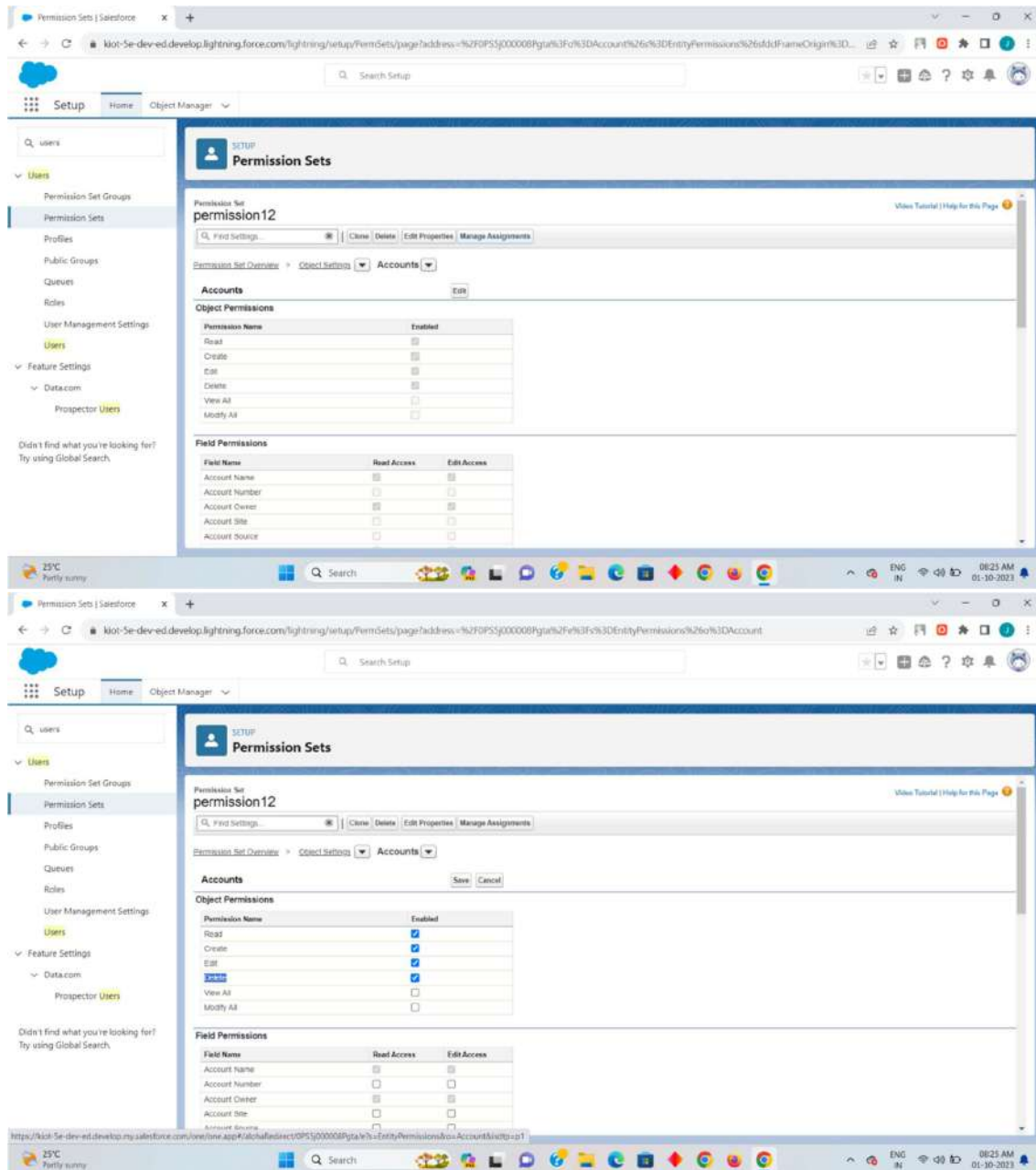
Save Cancel





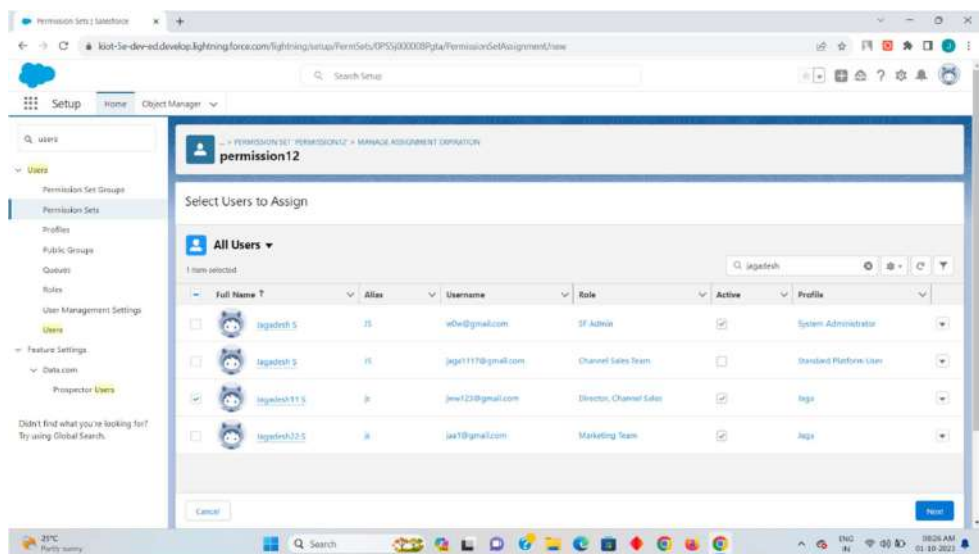
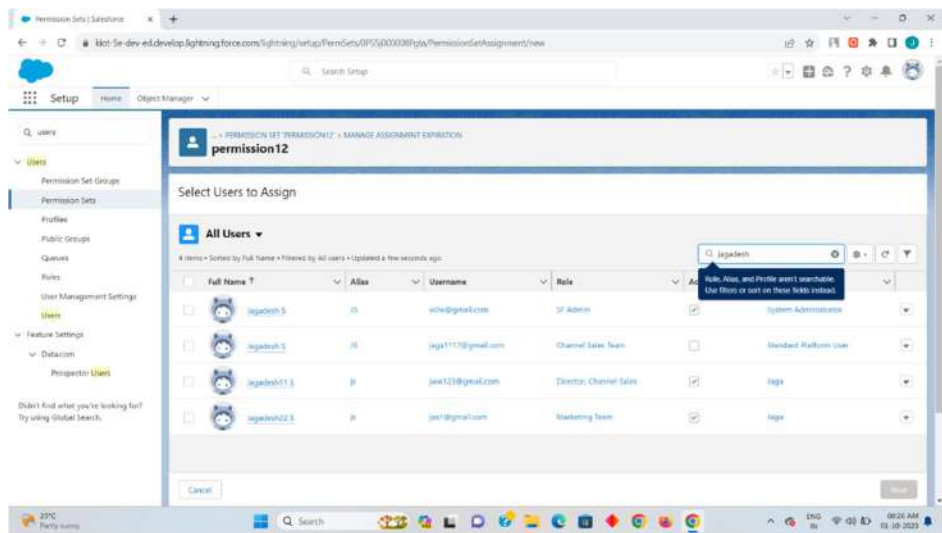
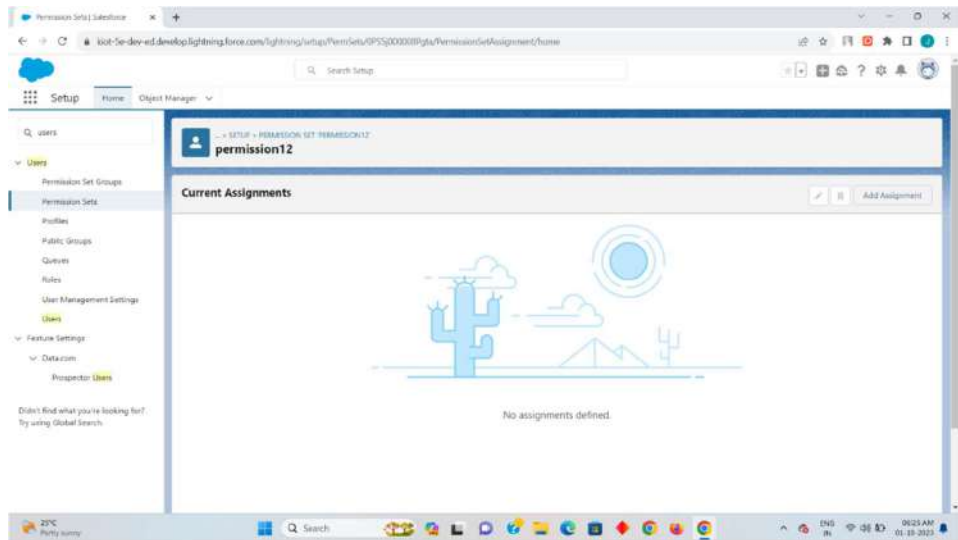
## Step 7:

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

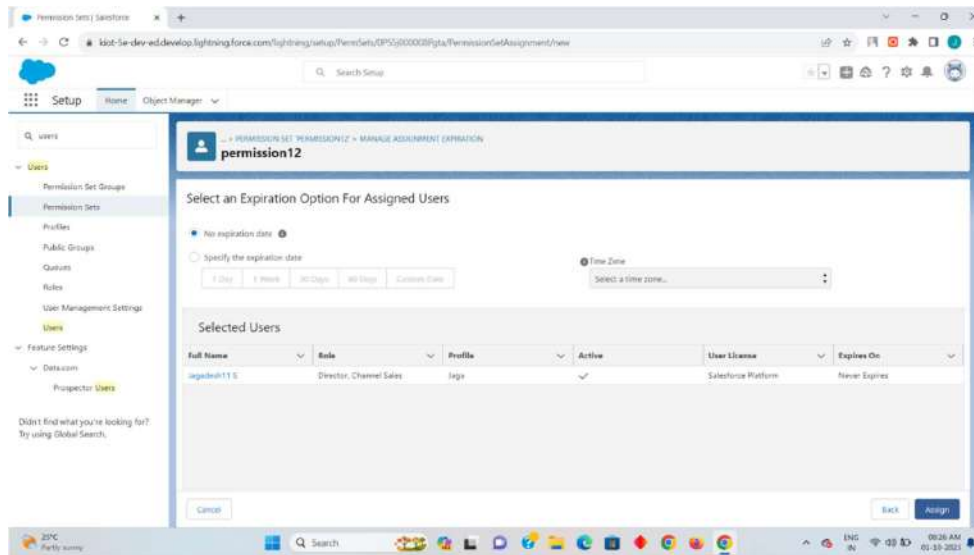


## Step 8

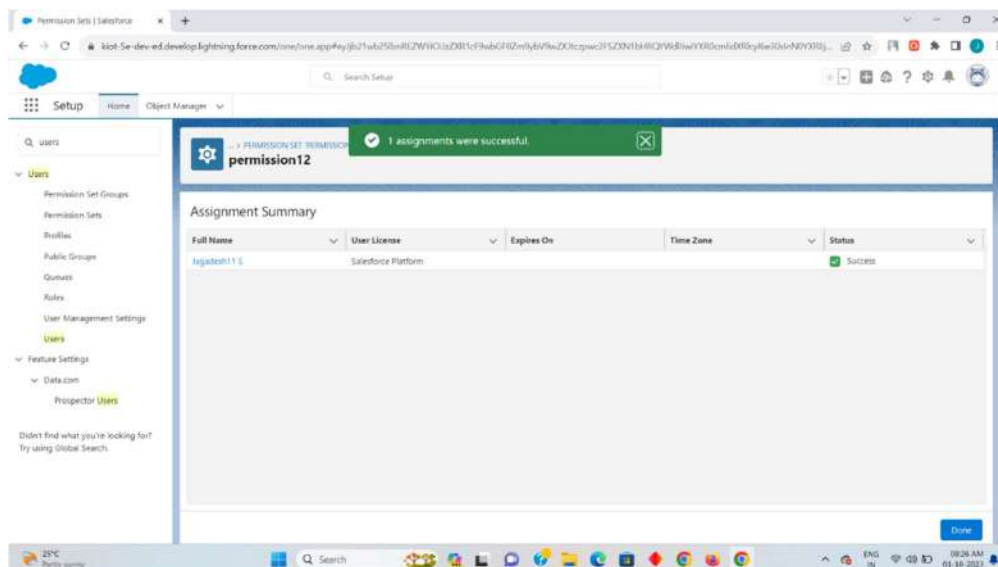
Now click on add assignment there you will find your two created users click on any one user to give a special access as delete on it and then click on assign so that the specific selected user can have a special access as delete on it.



Click on next.



Now click on Assign.



Now the specific access for the Jagadeh11 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**.

SETUP > OBJECT MANAGER

Survey Result

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Search Layouts for Salesforce Classic

Triggers

Validation Rules

Fields & Relationships

8 Items, Sorted by Name

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

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

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

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



Email Template

Thank You Email - Survey

Edit in Builder Edit Clone

Details

Related

Information

Email Template Name

Thank You Email - Survey

Related Entity Type

Survey Result

Description

Folder

Public Email Templates

Made in Email Template Builder

☒

Message Content

Subject

Thank You For Completing Our Survey!

Enhanced Letterhead

HTML Value

Hi {{{Survey\_Result\_\_c.Name\_\_c}}},

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

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

Thanks,

Automation Champion

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:**
8. Click **Save**.

**Edit Email Alert**  
Survey - Thank You Email

Create an email alert to associate with one or more workflow rules, approval processes, or entitlement processes. When changing an email alert, any modifications will apply to all rules, approvals, or entitlement processes associated with it.

**Email Alert Edit** Save Save & New Cancel

**Edit Email Alert** ⓘ = Required Information

Description Survey - Thank You Email

Unique Name Survey\_Thank\_You\_Email ⓘ

Object Survey Result

Email Template Thank You Email - Survey ⓘ

Protected Component ☐

Recipient Type Search: User ⓘ for: ⓘ Find

**Recipients**

**Available Recipients**

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

**Selected Recipients**

Email Field: Email

Add  
Remove

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

**Additional Emails**

**From Email Address** Current User's email address ⓘ  
☐ Make this address the default From email address for this object's email alerts. ⓘ

Save Save & New Cancel

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

1. Click **Setup**.

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

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

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

2. **Value: {!Comment}**

2. **Click Add Row**

3. **Row 2:**

1. **Field: Email\_\_c**

2. **Value: {!Email.value}**

4. **Click Add Row**

5. **Row 3:**

1. **Field: Name\_\_c**

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

6. **Click Add Row**

7. **Row 3:**

1. **Field: Rating\_\_c**

2. **Value: {!Rating}**

7. **Click Done.**

Edit Create Records

Create Salesforce records using values from the flow.

\*Label  
Save Response

\*API Name  
Save\_Response

Description

How Many Records to Create  
☒ One  
☐ Multiple

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

Create a Record of This Object  
\*Object  
Survey Result

Set Field Values for the Survey Result

| Field      | Value                                |
|------------|--------------------------------------|
| Comment__c | ← A Comment ×                        |
| Email__c   | ← A Email > Value ×                  |
| Name__c    | ← {!Name.firstName} {!Name.lastName} |
| Rating__c  | ← A Rating ×                         |

+ Add Field

☐ Manually assign variables

Cancel Done

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

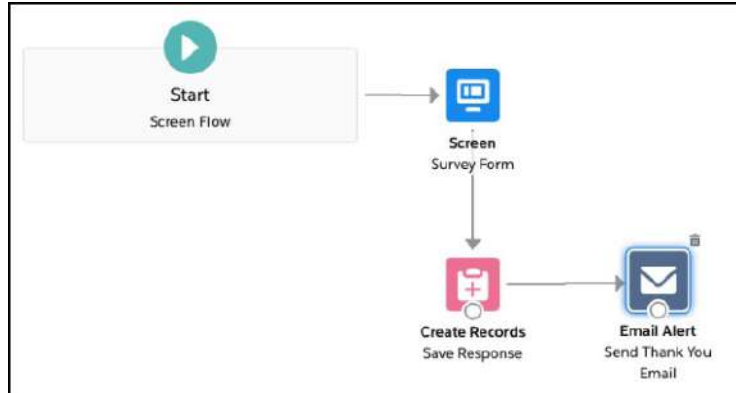
The next step is to call the **Survey – Thank You Email** email alert from flow so that when flow fires it triggers the thank you email to survey participants.

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**.

The screenshot shows a configuration window titled "Edit 'Survey - Thank You Email' email alert". It contains a description field, a "Label" field with the value "Send Thank You Email", an "API Name" field with the value "Send\_Thank\_You\_Email", and a "Set Input Values" section with a "Record ID" field containing the expression "{!Save\_Response}". At the bottom right are "Cancel" and "Done" buttons.

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



1. Click **Save**.
2. Enter **Flow Label** the **API Name** will auto-populate.
3. Click **Show Advanced**.

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

**5. Type: Screen Flow**

**6. API Version for Running the Flow: 51**

**7. Interview Label: Survey  
{!\$Flow.CurrentDateTime}**

**8. Click Save.**

Save as

A New Version

A New Flow

\* Flow Label

Survey

\* Flow API Name

Survey

Description

Hide Advanced

How to Run the Flow ⓘ

User or System Context—Depends on How Flow is Launched

\* Type

Screen Flow

\* API Version for Running the Flow

51

Interview Label ⓘ

Insert a resource...

Survey {!\$Flow.CurrentDateTime}

Last Modified

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

Status:

Active

Type:

Screen Flow

Version Number:

2

Cancel

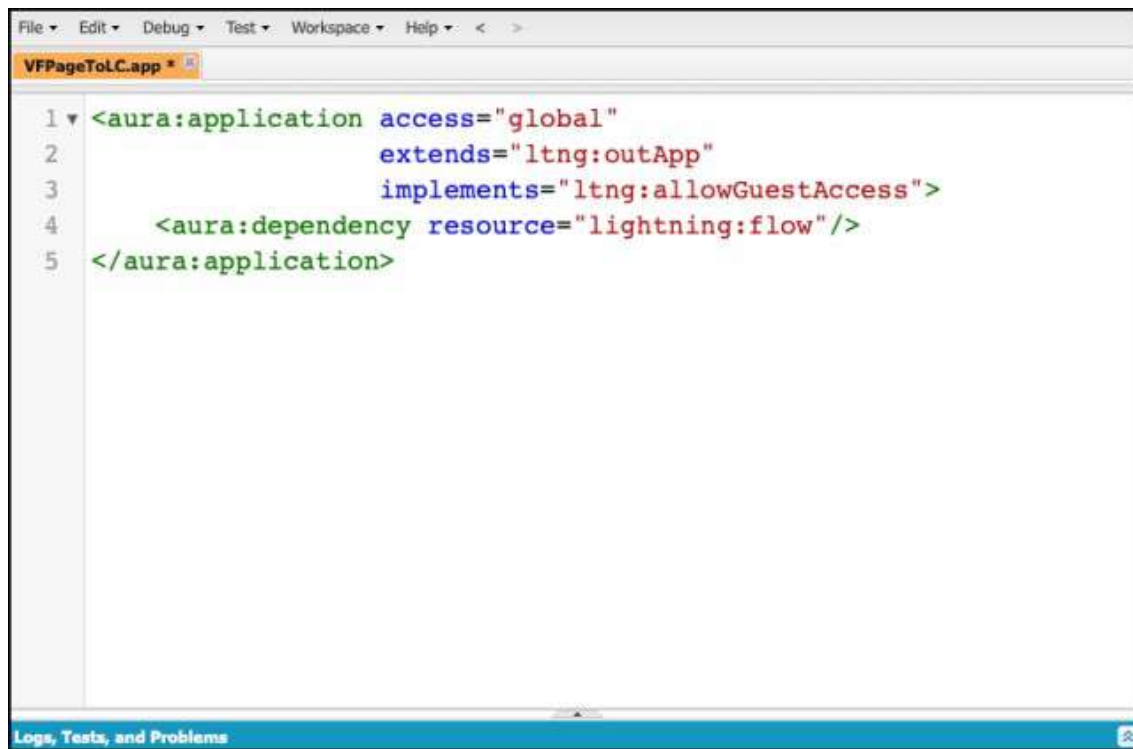
Save

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

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

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





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

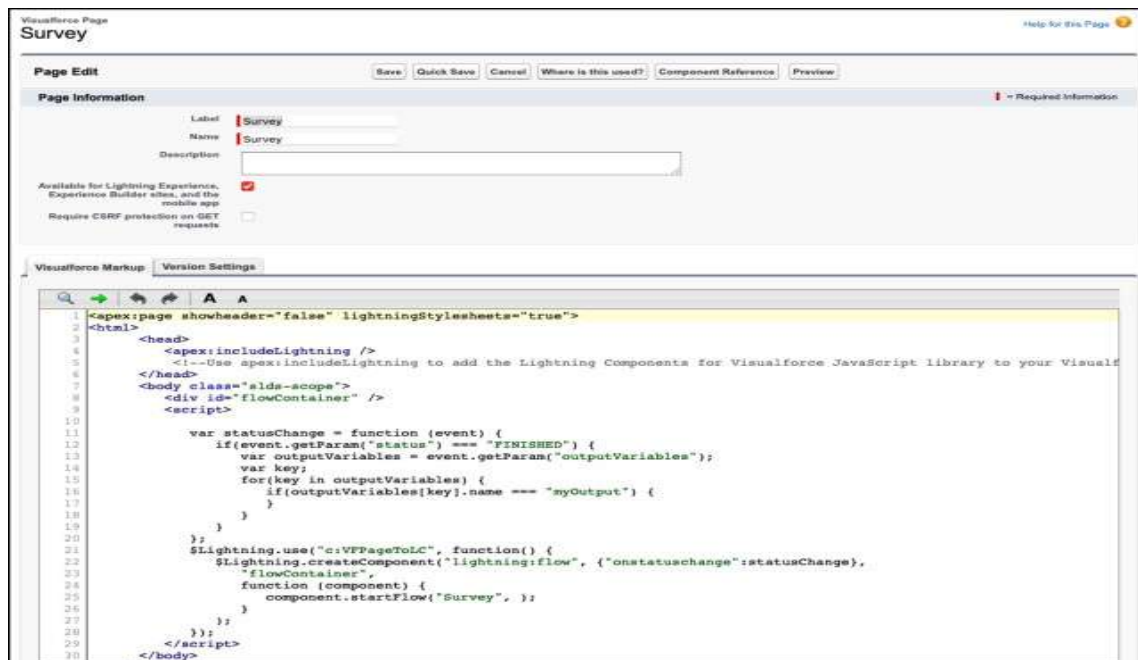
## Step 6: Create a Visualforce Page and Embed Your Flow Into It

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**.



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

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

1. Click **Setup**.

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

**Site Edit** [Save] [Cancel]

Site Label: Survey [i]

Site Name: Survey [i]

Site Description: [Text Area]

Site Contact: Rakesh Gupta [i]

Default Record Owner: Rakesh Gupta [i]

Default Web Address: http://kathar-developer-edition.gus.force.com/survey [i]

Active: ☒ [i]

Active Site Home Page: Survey [Preview]

Inactive Site Home Page: InMaintenance [Preview]

Site Template: SiteTemplate [i]

Site Robots.txt: [Text Field]

Site Favorite Icon: [Image Field]

Analytics Tracking Code: [Text Field]

URL Rewriter Class: [Text Field]

Enable Feeds: ☐

Clickjack Protection Level: Allow framing by the same origin only (Recommended) [i]

Require Secure Connections (HTTPS): ☒ [i]

Lightning Features for Guest Users: ☒ [i]

Upgrade all requests to HTTPS: ☒ [i]

Enable Content Sniffing Protection: ☒ [i]

Enable Browser Cross Site Scripting Protection: ☒ [i]

Referrer URL Protection: ☒ [i]

Guest Access to the Payments API: ☐ [i]

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

## Proof of Concept

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

### Survey

Name

First Name

Alok

Last Name

Sinhal

\*Email

\*Rating

5 

\*Comment

Awesome Blog 

Next

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

A screenshot of an email interface. At the top, the subject line reads "Thank You For Completing Our Survey!". To the right of the subject line is an "Inbox" button with a plus icon. On the far right of the header are icons for a printer, a share icon, and a refresh icon. Below the header, on the left, is a profile picture of a person and the text "Survey Site Guest User" followed by the email address "gja@yanqite/r/3-cdrmaa.gs@inc.salesforce.com". To the right of this, the text "E 07 PM (1 minute ago)" is displayed, followed by star and reply icons. The main body of the email is on the left, with a light blue background. It contains the following text: "Hi Alok Sinhal," followed by a paragraph: "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." This is followed by another paragraph: "Once again, we are extremely grateful for your contributing your valuable time, your honest information, and your thoughtful suggestions." The email ends with "Thanks, Automation Champion". On the right side of the email body, there is a light blue vertical bar. At the bottom of the email body, there are two buttons: "Reply" and "Forward".