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Salesforce Developer(Course)
Assignment no: 1

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Year & Dep : IV 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 Salesforce Setup interface with the following details:

- Header:** Includes the Salesforce logo, a search bar labeled "Search Setup", and various navigation icons.
- Breadcrumbs:** "Setup" > "Object Manager" > "New Custom Object".
- Title Bar:** "SETUP" and "New Custom Object".
- Page Content:**
 - Custom Object Definition Edit:** A tab-based editor with tabs for "Save", "Save & New", and "Cancel".
 - Custom Object Information:**
 - The singular and plural labels are used in tabs, page layouts, and reports.
 - Label:** College (Example: Account)
 - Plural Label:** Colleges (Example: Accounts)
 - Starts with vowel sound:**
 - Object Name:** College (Example: Account)
 - Description:** (Large text area)
 - Context-Sensitive Help Setting:**
 - Open the standard Salesforce.com Help & Training window
 - Open a window using a Visualforce page
 - Content Name:**
 - Enter Record Name Label and Format:**
 - The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.
 - Record Name:** College Name (Example: Account Name)
 - Data Type:**
 - Optional Features:**
 - Allow Reports
 - Allow Activities
 - Track Field History
 - Allow in Chatter Groups
 - Enable Licensing [?](#)
 - Object Classification:**
 - When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more](#).
 - Allow Sharing
 - Allow Bulk API Access
 - Allow Streaming API Access
 - Deployment Status:**
 - In Development
 - Deployed
 - Search Status:**
 - When this setting is enabled, your users can find records of this object type when they search. [Learn more](#).
 - Allow Search
 - Object Creation Options (Available only when custom object is first created):**
 - Add Notes and Attachments related list to default page layout
 - Launch New Custom Tab Wizard after saving this custom object
- Buttons at the bottom:** "Save", "Save & New", and "Cancel".

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

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. A message at the top indicates that permissions for the object are disabled by default. The 'Custom Object Definition Edit' page is displayed, showing fields for 'Label' (Department), 'Plural Label' (departments), and 'Object Name' (department). Other sections include 'Custom Object Information', 'Enter Record Name Label and Format', 'Optional Features', 'Object Classification', 'Deployment Status', 'Search Status', and 'Object Creation Options'. Buttons at the bottom allow saving changes.

Step 2: Create a Master-Detail Relationship

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

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

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

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

Object Manager: CDepartment

Details tab selected.

Fields & Relationships section:

- Description
- API Name: CDepartment__c
- Custom: ✓
- Singular Label: CDepartment
- Plural Label: CDepartments

Page Layouts section:

- Enable Reports
- Track Activities
- Track Field History

Buttons, Links, and Actions section:

- Deployment Status: Deployed
- Help Settings: Standard salesforce.com Help Window

Compact Layouts section:

- Record Types
- Related Lookup Filters
- Restriction Rules
- Scoping Rules
- Triggers
- Flow Triggers
- Validation Rules

Field Sets section:

- Edit | Delete

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

Object Manager: CDepartment

Fields & Relationships tab selected.

New Relationship step 3 of 6:

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

Field Label: college

Field Name: college

Description: (empty)

Help Text: (empty)

Child Relationship Name: CDepartments

Sharing Setting:

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

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

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

Help for this Page

Previous | Next | Cancel

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

Screenshot 1: New Relationship

- Left Panel:** Shows the "Fields & Relationships" section under "Object Manager". Other options include Details, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, Scoping Rules, Triggers, Flow Triggers, and Validation Rules.
- Right Panel:** Step 2 of 6, titled "Choose the related object". It shows a dropdown menu set to "college". Navigation buttons: Previous, Next, Cancel.

Screenshot 2: New Custom Field

- Left Panel:** Shows the "Fields & Relationships" section under "Object Manager". Other options are identical to Screenshot 1.
- Right Panel:** Step 1 of 6, titled "Choose the field type". It shows a "Data Type" section with several options:
 - None Selected**: Select one of the data types below.
 - Auto Number**: A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
 - Formula**: A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
 - Roll Up Summary**: A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
 - Lookup Relationship**: Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
 - Master-Detail Relationship**: Creates a specific type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:
 - The master record is required on all detail records.
 - The ownership and sharing of a detail record are determined by the master record.
 - When a user deletes the master record, all detail records are deleted.
 - You can create rollup summary fields on the master record to summarize the detail records.
 - External Lookup Relationship**: Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.
 - Boolean**: Allows users to select a True (checked) or False (unchecked) value.

Step 3: Create the Roll-Up Summary Field

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

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

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

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

The screenshot shows the Salesforce Setup interface with the tabs bar at the top. The 'Setup' tab is selected. Below it, the 'Object Manager' dropdown is open, showing 'User Interface' and 'Tabs'. A search bar at the top right contains the text 'Search Setup'. The main content area is titled 'Custom Tabs' under the 'SETUP Tabs' section. It includes a note about creating new custom tabs to extend Salesforce functionality. Below this are sections for 'Custom Object Tabs', 'Web Tabs', 'Visualforce Tabs', 'Lightning Component Tabs', and 'Lightning Page Tabs', each with a 'New' button and a 'What Is This?' link. The 'Custom Object Tabs' section lists three tabs: 'Book1' (Box style), 'Research Proposal' (Square style), and 'student' (Box style). The 'Web Tabs' section notes 'No Web Tabs have been defined'. The 'Visualforce Tabs' section notes 'No Visualforce Tabs have been defined'. The 'Lightning Component Tabs' section notes 'No Lightning component tabs have been defined'. The 'Lightning Page Tabs' section notes 'No Lightning Page Tabs have been defined'.

The screenshot shows the Salesforce Setup interface with the tabs bar at the top. The 'Setup' tab is selected. Below it, the 'Object Manager' dropdown is open, showing 'Fields & Relationships' (which is selected) and other options like 'Page Layouts', 'Lightning Record Pages', etc. A search bar at the top right contains the text 'college'. The main content area is titled 'New Custom Field' for the 'college' object. It is on 'Step 5. Add to page layouts' of a 5-step process. The steps are labeled 'Step 5 of 5'. The page layout configuration section shows a field named 'Total count' with type 'Roll-Up Summary' and name 'Total_count'. It has a description field. Below this, instructions say to select page layouts for the field. Two checkboxes are shown: 'Add Field' (selected) and 'Page Layout Name' (selected), with 'college Layout' listed. At the bottom, there are buttons for 'Previous', 'Save & New', 'Save', and 'Cancel'.

New Custom Field

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.

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cloud Kicks Admin	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
customer	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Force crm - Abo Subscription User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Help for this Page

New Custom Field

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: None

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

Help for this Page

New Custom Field

Step 2. Enter the details

Field Label: [?](#)

Field Name: [?](#)

Description:

Help Text:

Auto add to custom report type: Add this field to existing custom report types that contain this entity [?](#)

Step 2 of 5

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

New Custom Field

Step 1. Choose the field type

Specify the type of information that the custom field will contain.

Data Type

- None Selected Select one of the data types below
- Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
- Formula A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
- Roll Up Summary A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
- Lookup Relationship Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
 - The relationship is defined on all detail records.
 - Deleting and sharing of a detail record are determined by the master record.
 - When a user deletes the master record, all detail records are deleted.
 - You can create rollup summary fields on the master record to summarize the detail records.
- Master-Detail Relationship The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.
- External Lookup Relationship Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.
- ... Allows users to select a True (checked) or False (unchecked) value.

Step 1

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

Fields & Relationships

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

Step 4: Create a Lightning App

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

10. Assign the app to users or profiles.

11. Test the app with the assigned users.

The screenshot shows the Salesforce Setup interface with the 'Tabs' configuration page. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The left sidebar has sections for 'User Interface' and 'Rename Tabs and Labels', with 'Tabs' selected. The main content area is titled 'New Custom Object Tab' and 'Step 2 Add to Profiles'. It displays a list of user profiles on the left and their 'Tab Visibility' settings on the right. Most profiles have 'Default On' selected. There are two radio buttons at the top: one for 'Apply one tab visibility to all profiles' (selected) and one for 'Apply a different tab visibility for each profile'. A note at the bottom says 'Choose the user profiles for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each profile.' The bottom right of the page has '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
Contract Manager	Default On
Cross Org Data Proxy User	Default On
Custom: Marketing Profile	Default On
Custom: Sales Profile	Default On
Custom: Support Profile	Default On
customer	Default On
Customer Community Login User	Default On
Customer Community Plus Login User	Default On
Customer Community Plus User	Default On
Customer Community User	Default On
Customer Portal Manager Custom	Default On
Customer Portal Manager Standard	Default On
External Apps Login User	Default On
External Identity User	Default On
Force.com - App Subscription User	Default On
Force.com - Free User	Default On
Gold Partner User	Default On
High Volume Customer Portal	Default On
High Volume Customer Portal User	Default On
Identity User	Default On
Manager	Default On
Marketing User	Default On
Minimum Access - Salesforce	Default On
Partner App Subscription User	Default On
Partner Community Login User	Default On
Partner Community User	Default On
Read Only	Default On
Research Manager	Default On
Research Users	Default On
Salesforce API Only System Integrations	Default On
Sales User	Default On
security profile	Default On
Silver Partner User	Default On
Solution Manager	Default On
Standard Platform User	Default On
Standard User	Default On
System Administrator	Default On

The screenshot shows the Salesforce Setup interface with the 'Tabs' tab selected under 'User Interface'. The main content area is titled 'New Custom Object Tab' and 'Step 1 of 3'. It asks to choose a custom object for the new tab, with 'college' selected. A 'Tab Style' section shows 'Jewel' selected. An optional 'Splash Page Custom Link' dropdown is set to 'None'. A 'Description' text area is empty. At the bottom right are 'Next' and 'Cancel' buttons.

The screenshot shows the 'Step 3. Add to Custom Apps' page of the 'New Custom Object Tab' configuration. It lists various standard Salesforce apps and their visibility checkboxes. Most checkboxes are checked. A checkbox for 'Append tab to users' existing personal customizations' is also checked. At the bottom right are 'Previous', 'Save', and 'Cancel' buttons.

Custom App	Include Tab
Platform (standard__Platform)	<input checked="" type="checkbox"/>
Sales (standard__Sales)	<input checked="" type="checkbox"/>
Service (standard__Service)	<input checked="" type="checkbox"/>
Marketing (standard__Marketing)	<input checked="" type="checkbox"/>
Sample Console (standard__ServiceConsole)	<input checked="" type="checkbox"/>
High Volume Customer Portal User	<input checked="" type="checkbox"/>
Authenticated Website User	<input checked="" type="checkbox"/>
App Launcher (standard__AppLauncher)	<input checked="" type="checkbox"/>
Community (standard__Community)	<input checked="" type="checkbox"/>
Site.com (standard__Sites)	<input checked="" type="checkbox"/>
Salesforce Chatter (standard__Chatter)	<input checked="" type="checkbox"/>
Content (standard__Content)	<input checked="" type="checkbox"/>
Analytics Studio (standard__Insights)	<input checked="" type="checkbox"/>
Sales Console (standard__LightningSalesConsole)	<input checked="" type="checkbox"/>
Service Console (standard__LightningService)	<input checked="" type="checkbox"/>
Sales (standard__LightningSales)	<input checked="" type="checkbox"/>
Lightning Usage App (standard__LightningInstrumentation)	<input checked="" type="checkbox"/>
Digital Experiences (standard__SalesforceCMS)	<input checked="" type="checkbox"/>
Queue Management (standard__QueueManagement)	<input checked="" type="checkbox"/>
Data Manager (standard__DataManager)	<input checked="" type="checkbox"/>
Bolt Solutions (standard__LightningBolt)	<input checked="" type="checkbox"/>
Salesforce Scheduler Setup (standard__LightningScheduler)	<input checked="" type="checkbox"/>

New Custom Object Tab

Step 1. Enter the Details Step 1 of 3

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

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

Object	CDepartment
Tab Style	Lightning

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

Splash Page Custom Link: [-None-](#)

Description:

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

Lightning Experience App Manager

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

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

The screenshot shows the Salesforce Setup interface with the 'Tabs' page selected. The top navigation bar includes 'Setup', 'Home', 'Object Manager', and various global icons. A search bar at the top right says 'Search Setup'. The main content area has a title 'Custom Tabs' with a sub-instruction: 'You can create new custom tabs to extend Salesforce functionality or to build new application functionality.' Below this, there are sections for 'Custom Object Tabs', 'Web Tabs', 'Visualforce Tabs', 'Lightning Component Tabs', and 'Lightning Page Tabs', each with a 'New' button and a 'What Is This?' link.

Custom Object Tabs

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

Web Tabs

No Web Tabs have been defined.

Visualforce Tabs

No Visualforce Tabs have been defined.

Lightning Component Tabs

No Lightning component tabs have been defined.

Lightning Page Tabs

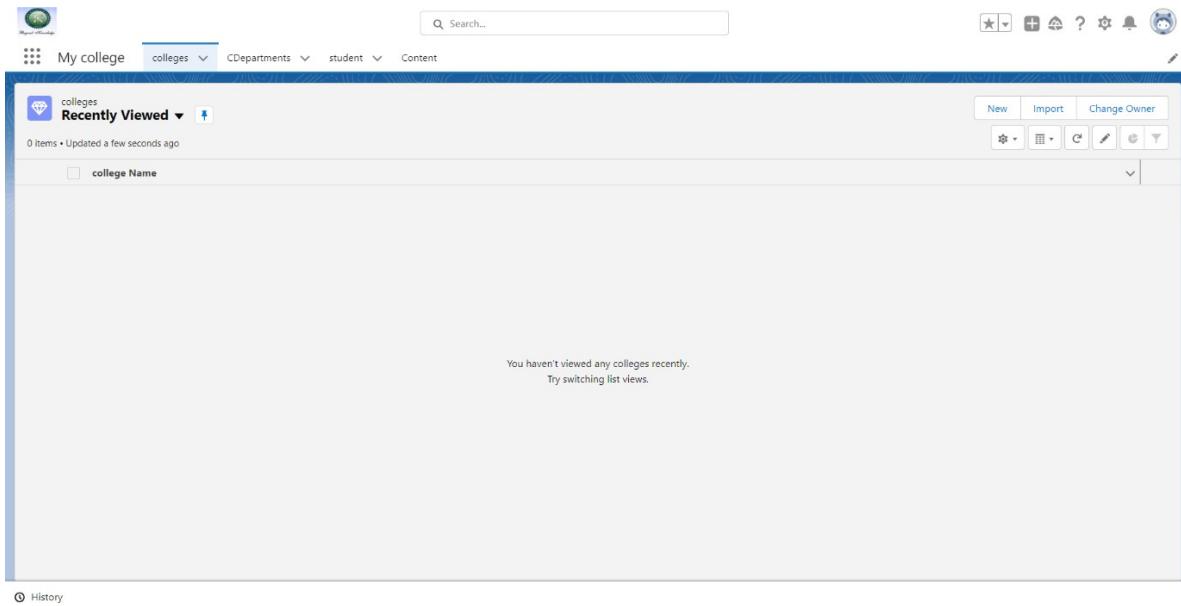
No Lightning Page Tabs have been defined.

The screenshot shows the 'New Lightning App' configuration page. The top navigation bar includes 'Setup', 'Home', 'Object Manager', and various global icons. A search bar at the top right says 'Search Setup'. The main content area has a title 'App Details & Branding' with a sub-instruction: 'Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.' It contains two main sections: 'App Details' and 'App Branding'. In 'App Details', fields include 'App Name' (My college), 'Developer Name' (My_college), and 'Description' (Enter a description...). In 'App Branding', there is an 'Image' field containing a logo for 'Beyond Knowledge', a 'Primary Color Hex Value' field set to '#217AC7', and an 'Org Theme Options' checkbox checked with the note 'Use the app's image and color instead of the org's custom theme'. A progress bar at the bottom indicates the process is at step 1 of 10, with a 'Next' button on the right. The left sidebar shows a tree view of 'Salesforce', including 'Data', 'Apps', 'Custom', 'Lightning', 'Mobile', and 'Setup'.

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.



New college

* = Required Information

Information

college Name: kiot

Owner: krishna s

phone: 9087116402

Email: kiot@ac.in

Location

Latitude: 90

Longitude: 80

Cancel Save & New Save

CDepartments

Recently Viewed

1 item • Updated a few seconds ago

Department Name

cse

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

My college colleges CDepartment

To unpin, pin another list view

CDepts Recently Viewed

1 item • Updated a minute ago

Department Name
cse

New CDepartment

* = Required Information

Information

*Department Name: information technology

*college: kiot

email: it@gmail.com

phone: 897577568

hod name: arul

about:

Cancel Save & New Save

History

The screenshot shows a Salesforce Lightning interface for creating a new record. The page title is "New CDepartment". The "Information" section is highlighted with a yellow background. The required fields are marked with an asterisk (*). The "Department Name" field contains "information technology". The "college" field is set to "kiot". The "email" field contains "it@gmail.com". The "phone" field contains "897577568". The "hod name" field contains "arul". The "about" field is empty. At the bottom, there are three buttons: "Cancel", "Save & New" (which is highlighted in blue), and "Save".

My college colleges CDDepts student Content

CDDepartment information technology

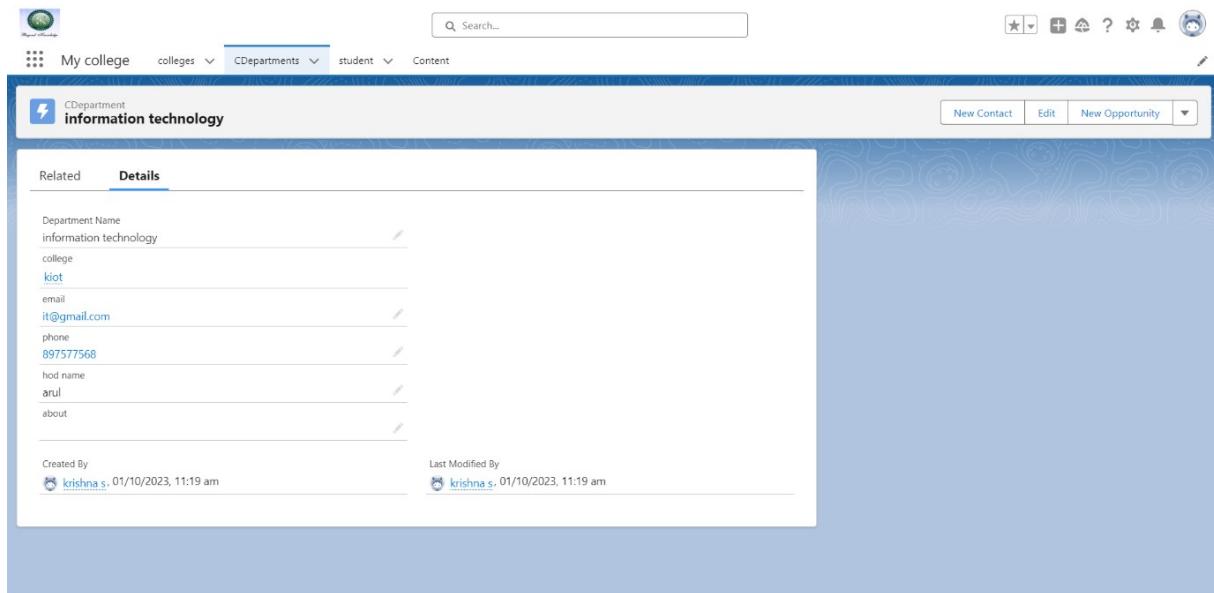
New Contact Edit New Opportunity

Related Details

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

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

History



My college colleges CDDepts student Content

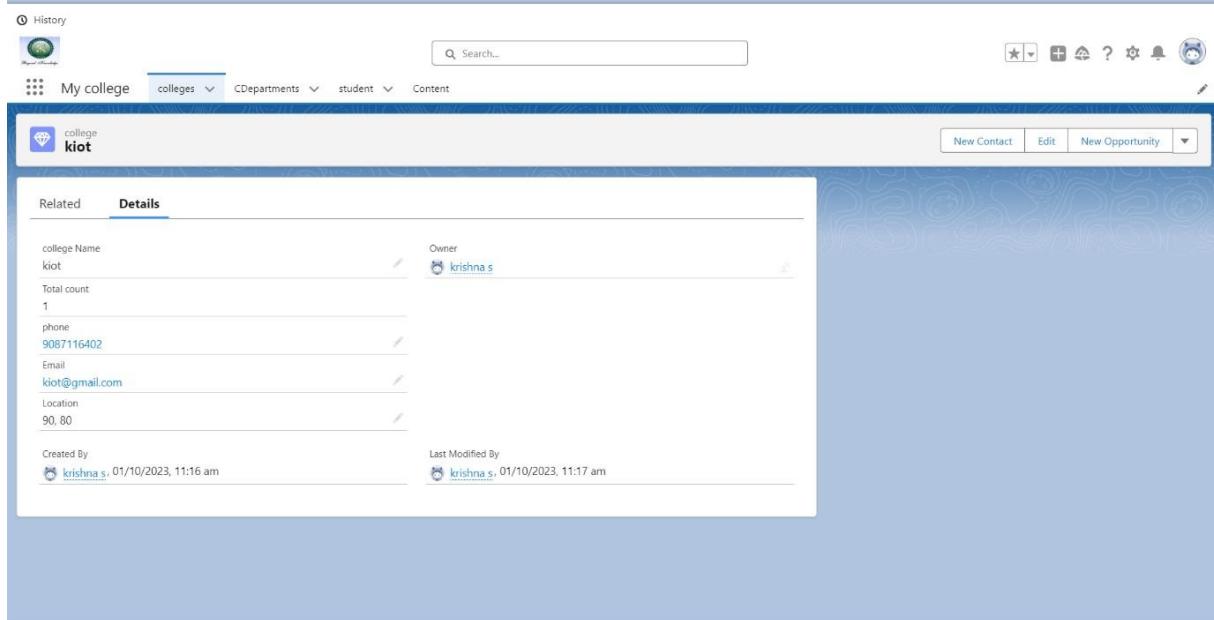
college kiot

New Contact Edit New Opportunity

Related Details

college Name: kiot Owner: krishna.s.
Total count: 1
phone: 9087116402
Email: kiot@gmail.com
Location: 90.80

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



My college colleges CDDepts student Content

CDDepts Recently Viewed

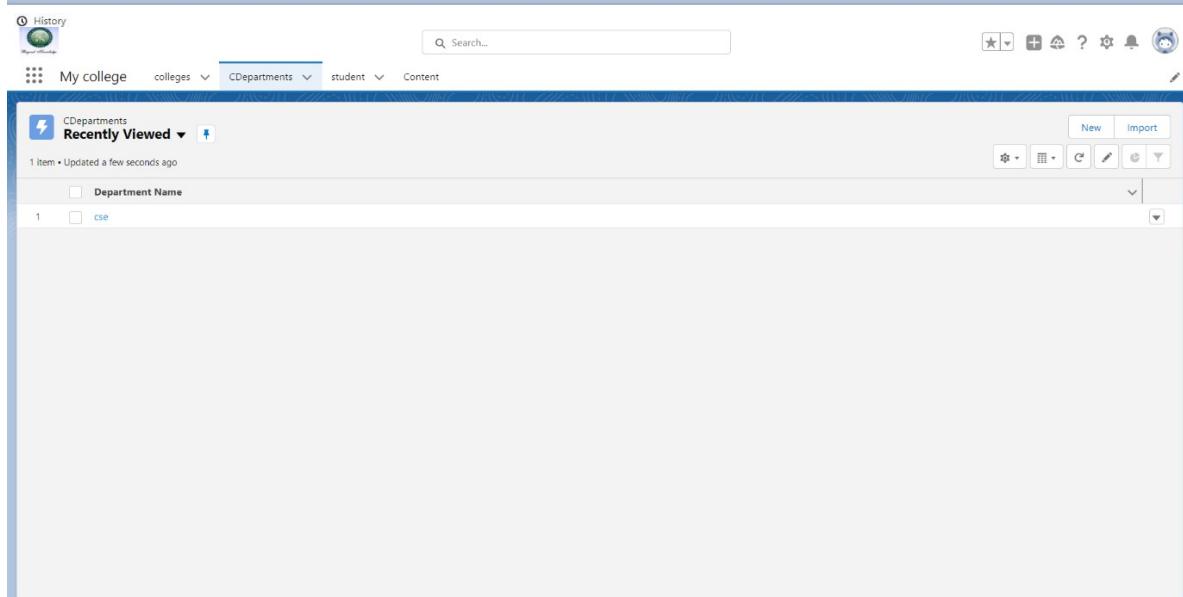
New Import

1 item • Updated a few seconds ago

Department Name

1 cse

History



Recently Viewed

1 item • Updated a few seconds ago

college Name

1 kiot

Details

Related

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

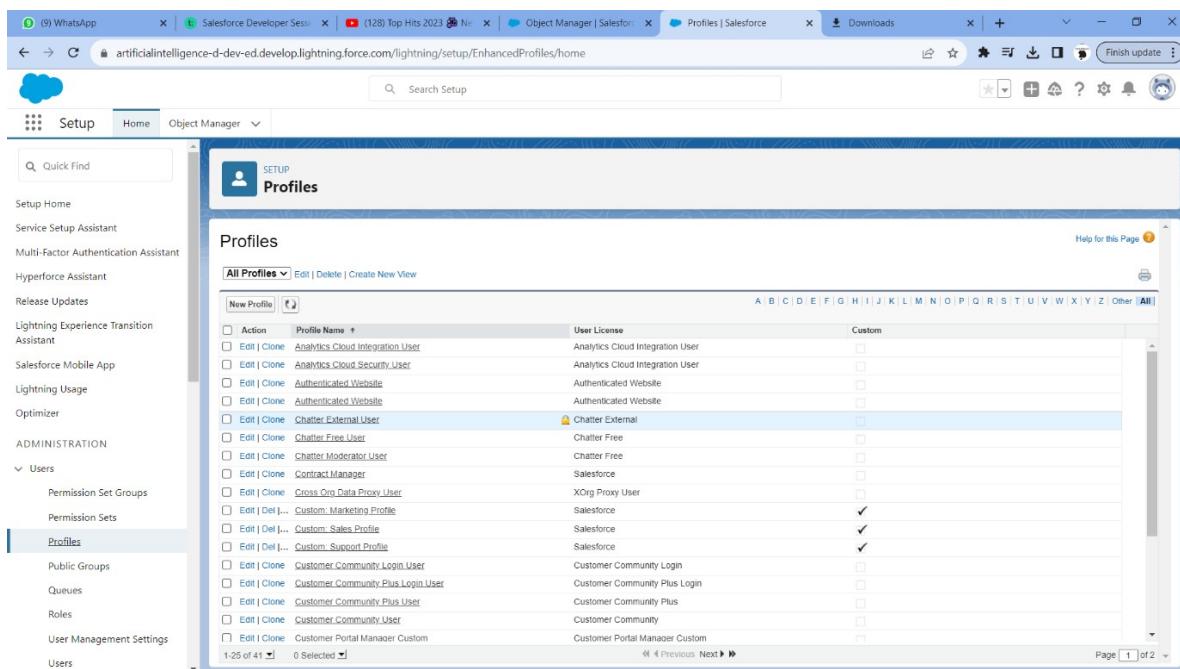
Last Modified By
krishna s, 01/10/2023, 11:19 am

New Contact | Edit | New Opportunity

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

Solution:

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



The screenshot shows the Salesforce Setup interface with the 'Profiles' page open. The left sidebar is collapsed, and the main area displays a table of profiles. The table has columns for 'Action', 'Profile Name', 'User License', and 'Custom'. The 'Custom' column contains checkboxes, many of which are checked for certain profiles. The profiles listed include 'Analytics Cloud Integration User', 'Analytics Cloud Security User', 'Authenticated Website', 'Authenticator Website', 'Chatter External User', 'Chatter Free User', 'Chatter Moderator User', 'Contract Manager', 'Cross Org Data Proxy User', 'Custom: Marketing Profile', 'Custom: Sales Profile', 'Custom: Support Profile', 'Customer Community Login User', 'Customer Community Plus Login User', 'Customer Community Plus User', 'Customer Community User', and 'Customer Portal Manager Custom'. The 'Custom' checkbox is checked for profiles like 'Custom: Marketing Profile', 'Custom: Sales Profile', and 'Customer Portal Manager Custom'.

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	Authenticator 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 Del ...	Custom: Marketing Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Custom: Sales Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Custom: Support Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Clone	Customer Community Login User	Customer Community Login	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Customer Community Plus Login User	Customer Community Plus Login	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Customer Community Plus User	Customer Community Plus	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Customer Community User	Customer Community	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Customer Portal Manager Custom	Customer Portal Manager Custom	<input type="checkbox"/>

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

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

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

Profiles

All Profiles | Edit | Delete | Create New View

New Profile

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

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

1-7 of 7 | 0 Selected | Page 1 of 1

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

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

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

Profiles

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from. * Required Information

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

Save Cancel

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

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

Profiles

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

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

Save Cancel

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

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

Profiles

Manager

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

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

Profile Detail	Edit Clone Delete View Users
Name	Manager
User License	Salesforce Platform
Description	
Created By	GOPALS_ 01/10/2023, 7:09 pm
Modified By	GOPALS_ 01/10/2023, 7:09 pm

Page Layouts

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

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

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

Manager

Set the permissions and page layouts for this profile.

Profile Edit

Name	Manager	User License	Salesforce Platform	Description	Custom Profile
Analytics Studio (standard_Insights)	<input type="checkbox"/>	<input checked="" type="radio"/>	Platform (standard_Platform)	<input type="checkbox"/>	<input checked="" type="radio"/>
App Launcher (standard_AppLauncher)	<input type="checkbox"/>	<input checked="" type="radio"/>	WDC (standard_Work)	<input type="checkbox"/>	<input checked="" type="radio"/>
kiot (kiot)	<input checked="" type="checkbox"/>	<input type="radio"/>			

Custom App Settings

Visible	Default
Analytics Studio (standard_Insights)	<input type="checkbox"/>
App Launcher (standard_AppLauncher)	<input type="checkbox"/>
kiot (kiot)	<input checked="" type="checkbox"/>
Platform (standard_Platform)	<input type="checkbox"/>
WDC (standard_Work)	<input checked="" type="checkbox"/>

Service Provider Access

Tab Settings

Overwrite users' personal tab customizations

Standard Tab Settings

Home	Default On	Learning	Default On
Accounts	<input checked="" type="checkbox"/>	Libraries	<input type="checkbox"/>
Alert Settings	<input checked="" type="checkbox"/>	Lightning Bolt Solutions	<input type="checkbox"/>

Custom Object Permissions

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

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

User passwords expire in: 90 days

Enforce password history: 3 passwords remembered

Minimum password length: 8

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

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

Manager

Set the permissions and page layouts for this profile.

Profile Edit

Name	Manager	User License	Salesforce Platform	Description	Custom Profile
Analytics Studio (standard_Insights)	<input type="checkbox"/>	<input checked="" type="radio"/>	Platform (standard_Platform)	<input type="checkbox"/>	<input checked="" type="radio"/>
App Launcher (standard_AppLauncher)	<input type="checkbox"/>	<input checked="" type="radio"/>	WDC (standard_Work)	<input type="checkbox"/>	<input checked="" type="radio"/>
kiot (kiot)	<input checked="" type="checkbox"/>	<input type="radio"/>			

Custom App Settings

Visible	Default
Analytics Studio (standard_Insights)	<input type="checkbox"/>
App Launcher (standard_AppLauncher)	<input type="checkbox"/>
kiot (kiot)	<input checked="" type="checkbox"/>
Platform (standard_Platform)	<input type="checkbox"/>
WDC (standard_Work)	<input checked="" type="checkbox"/>

Service Provider Access

Tab Settings

Overwrite users' personal tab customizations

Standard Tab Settings

Home	Default On	Learning	Default On
Accounts	<input checked="" type="checkbox"/>	Libraries	<input type="checkbox"/>
Alert Settings	<input checked="" type="checkbox"/>	Lightning Bolt Solutions	<input type="checkbox"/>

Custom Object Permissions

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

Session Settings

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User passwords expire in: 90 days

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Minimum password length: 8

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

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

Contact Point Addresses Contact Point Consents Contact Point Emails Sellers Streaming Channels User External Credentials

Custom Object Permissions

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

Observe secret answer for password reset
Require a minimum 1 day password lifetime
Don't immediately expire links in forgot password emails

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

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

Contact Point Addresses Contact Point Consents Contact Point Emails Sellers Streaming Channels User External Credentials

Custom Object Permissions

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

Session Settings

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

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User passwords expire in:	90 days
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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

Observe secret answer for password reset
Require a minimum 1 day password lifetime
Don't immediately expire links in forgot password emails

Salesforce Developer Session | lightning/setup/EnhancedProfiles/page?address=%2F00e500000WQbz%2Fe%3Fr?url%3D%252F00e5j0... | Object Manager | Salesforce | Profiles | Salesforce | Downloads | + | - | Search Setup | Home | Object Manager | Setup

Custom Object Permissions

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

Salesforce Developer Session | lightning/setup/ManageUsers/home | Object Manager | Salesforce | Users | Salesforce | Downloads | + | - | Search Setup | Home | Object Manager | Setup

All Users

This page allows you to create, view, and manage users.

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

View: All Users | Edit | Create New View

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit Login	Adanna Ciya	dadan	test_ciya_nas_4w@0lybd9wtk.tszqrqstbxox_3o8ofvzwns.h43tkezy6mea@gmail.com		<input checked="" type="checkbox"/>	UAMS User
<input type="checkbox"/> Edit	Chatter Export	Chatter	chatty_00d50000000cs3kean.lo0h0fmng0e@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit Login	Ellington Amelia	aelli	amelia.ellington.146kxcp900in6bcwpoctcu4wh.hnbdavmvwhwho.wgucter1dalv@gmail.com		<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/> Edit	S_GCPAI	GS	kot520@gmail.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	User_Integration	integ	integration@0005900000bc3kean.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightssecurity@00d5000000bc3keab.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

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

Setup Home Object Manager

Users

New User

User Edit Save Save & New Cancel

General Information

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

Role <None Specified> User License Salesforce Integration Profile Salesforce API Only System Integrations Active Marketing User Offline User Knowledge User Flow User Service Cloud User Site.com Contributor User Site.com Publisher User WDC User Data.com User Type -None- Data.com Monthly Addition Limit Default Limit (300) Accessibility Mode (Classic Only) High-Contrast Palette on Charts Load Lightning Pages While Scrolling Debug Mode

Help for this Page

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

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005%2Fe%3FretURL%3D%252F005%253FisUserEntityOv...

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

Setup Home Object Manager

Users

New User

User Edit Save Save & New Cancel

General Information

First Name	sowmya
Last Name	bala
Alias	sbala
Email	2k20cse179@kiot.ac.in
Username	2k21t@kiot.ac.in
Nickname	User169616771282564526
Title	worker
Company	kiot bank
Department	
Division	

Role <None Specified> User License Salesforce Platform Profile Manager Active Marketing User Offline User Knowledge User Flow User Service Cloud User Site.com Contributor User Site.com Publisher User WDC User Data.com User Type -None- Data.com Monthly Addition Limit Default Limit (300) Accessibility Mode (Classic Only) High-Contrast Palette on Charts Load Lightning Pages While Scrolling Debug Mode

Help for this Page

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

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005%2Fe%3FretURL%3D%252F005%253FisUserEntityOv...

Screenshot of a web browser showing the Salesforce Setup interface for managing users. The URL is <https://artificialintelligence-d-dev-ed-develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005j00000AUxG%3Fnoredirect%3D1%26isUserEntityO...>. The page displays user details for "sowmyi bala" with various configuration tabs like Edit, Sharing, Reset Password, Login, and Freeze.

The sidebar on the left shows navigation categories such as Hyperforce Assistant, Release Updates, Lighting Experience Transition Assistant, Salesforce Mobile App, Lighting Usage, Optimizer, Administration, and Platform Tools.

Below the user detail section, there is an email from support@salesforce.com with a subject line "Welcome to Salesforce!" containing a verification link and account information.

Salesforce

Change Your Password

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

- 8 characters
- 1 letter
- 1 number

* New Password
..... Good

* Confirm New Password
..... Match

Security Question
In what city were you born?

* Answer
salem

Change Password

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

Login | Salesforce

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

salesforce

Username
2k21it@kiot.ac.in

Password
.....

Log In

Remember me

Forgot Your Password?

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

WATCH ON DEMAND

AI Day

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Recently Viewed | Bank | Salesfo

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

Incognito Finish update

Search...

Recently Viewed

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

Bank Name ↓

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

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

DISPLAY DENSITY

✓ Comfy

Compact

OPTIONS

Switch to Salesforce Classic ⓘ

Add Username

This screenshot shows the Salesforce Lightning Experience. The top navigation bar includes tabs for 'Bank', 'customers', and 'Home'. A search bar is at the top right. On the left, there's a sidebar with a 'Recently Viewed' section showing a single item: '0 items • Sorted by Bank Name • Updated a few seconds ago'. Below this is a table header with a 'Bank Name' column. A message in the center says 'You haven't viewed any Bank recently.' with a 'Try switching list views.' link. On the right, a user profile for 'sowmiya bala' is displayed with options to switch density (set to 'Comfy'), log out, or switch to classic mode.

New Bank | Salesforce

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

Incognito Finish update

Search...

New Change Owner

Bank customers Home

Recently Viewed

0 items • Updated a few seconds ago

Bank Name

New Bank

* = Required Information

Information

Bank Name: boi

Owner: sowmiya bala

phoneno: 0897754534

Cancel Save & New Save

This screenshot shows the 'New Bank' form in the Salesforce Lightning Experience. The title bar says 'New Bank | Salesforce'. The form has a 'New' button and a 'Change Owner' button. It contains fields for 'Bank Name' (set to 'boi') and 'Owner' (set to 'sowmiya bala'). There's also a 'phoneno' field containing '0897754534'. At the bottom are 'Cancel', 'Save & New', and 'Save' buttons. The background shows the 'Recently Viewed' list from the previous screenshot.

New customer | Salesforce

https://artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/o/customer__c/new?count=2&nooverride=1&useRecordTypeCheck=1&navigationLocation=LIST_VIEW&ui...

Recently Viewed ▾

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

customer Name ↓

New customer

* = Required Information

Information

* customer Name: madhu

* Bank: boi

Cancel Save & New Save

madhu | customer | Salesforce

https://artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/r/customer__c/a025j00000fDYaAM/view

customer "madhu" was created.

Related Details

customer Name: madhu

Bank: boi

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

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

New Contact Edit Delete

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

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

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

Profiles

All Profiles | Edit | Delete | Create New View

New Profile |

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

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

1 of 7 | 0 Selected | Page 1 of 1

javascript:srcUp('27%2F_ur%2Fperms%2Fu%2Fprofile%2FProfileClone%2Fe%3fid%3D00e5|000003uvKu%26setupid%3DEnhancedProfiles%26retURL%3D%253F00e%253Frt%253D0085|00000c7U%2526rolodexIndex%253D18%2526page%253D1%2526sdtp%253D0p1%26sdsp%253D1')

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

artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F_ur%2Fperms%2Fu%2Fprofile%2FProfileClone%2FProfileClone

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

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from. | * Required Information

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

Save | Cancel

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

- Page Header:** artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j00000WQCE%3Fsetupid%3DEnhancedPr...
- Left Sidebar:** Includes links for Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, ADMINISTRATION, and a expanded section for Users.
- Current Section:** Profiles
- Profile Details:** Profile Name: salesmanagement, User License: Salesforce Platform, Description: Created By: GOPAL_S_ 01/10/2023, 7:19 pm, Modified By: GOPAL_S_ 01/10/2023, 7:19 pm.
- Page Layouts:** A table showing Standard Object Layouts and their corresponding Global Layouts, Operating Hours, and Payment Methods.

Object	Layout Type	Global Layout	Operating Hours	Payment Method
Account	Email Application	Global Layout [View Assignment]	Order	Payment
Asset	Alternative Payment Method	Global Layout [View Assignment]	Order Product	Payment Authorization
Appointment Invitation	Appointment Invitation Layout	Global Layout [View Assignment]	Payment Authorization Adjustment	Payment Authorization Adjustment Layout
Asset	Asset Layout	Global Layout [View Assignment]	Payment Gateway	Payment Gateway Layout

The screenshot shows the Salesforce Setup interface for creating a new profile. The left sidebar is titled 'Setup' and includes sections for Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, and Lightning Usage Optimizer. Under 'ADMINISTRATION', the 'Profiles' section is selected, which is highlighted with a blue bar. The main content area is titled 'Profiles' and shows a 'Profile Edit' screen for a profile named 'salesmanage'. The profile details include a User License of 'Salesforce Platform' and a Description field. A 'Custom Profile' checkbox is checked. Below this, the 'Custom App Settings' section lists several apps with visibility and default settings. The 'Service Provider Access' section contains a 'Tab Settings' section with an unchecked checkbox for 'Overwrite users' personal tab customizations'. At the bottom, there are 'Standard Tab Settings' for 'Accounts' and 'Leads' with a 'Default On' button.

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

Finish update

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

Custom Object Permissions

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

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

Finish update

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

Custom Object Permissions

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

Save Save & New Cancel

Salesforce Developer Session 2 | (128) Top Hits 2023 | New Po | Users | Salesforce | Welcome to Salesforce: Verify y | + | - | Search Setup | Home | Object Manager | Setup | Finish update

New User

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

General Information

First Name	madhu
Last Name	b
Alias	mb
Email	2k20cse179@kiot.ac.in
Username	2k20cse179@kiot.ac.in
Nickname	User169616842428654192
Title	worker
Company	kiot bank
Department	Sales
Division	

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

Marketing User | Offline User | Knowledge User | Flow User | Service Cloud User | Site.com Contributor User | Site.com Publisher User | WDC User | Data.com User Type: None | Data.com Monthly Addition Limit: Default Limit (300) | Accessibility Mode (Classic Only) | High-Contrast Palette on Charts | Load Lightning Pages While Scrolling: | Debug Mode

Salesforce Developer Session 2 | (128) Top Hits 2023 | New Po | Users | Salesforce | Welcome to Salesforce: Verify y | + | - | Search Setup | Home | Object Manager | Setup | Finish update

New User

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

General Information

First Name	madhu
Last Name	b
Alias	mb
Email	2k20cse179@kiot.ac.in
Username	2k20cse179@kiot.ac.in
Nickname	User169616842428654192
Title	worker
Company	kiot bank
Department	Sales
Division	

Role: <None Specified> | User License: Salesforce Platform | Profile: SalesManager | Active:

Marketing User | Offline User | Knowledge User | Flow User | Service Cloud User | Site.com Contributor User | Site.com Publisher User | WDC User | Data.com User Type: None | Data.com Monthly Addition Limit: Default Limit (300) | Accessibility Mode (Classic Only) | High-Contrast Palette on Charts | Load Lightning Pages While Scrolling: | Debug Mode

The screenshot shows the Salesforce Setup interface for managing users. The left sidebar is open, showing categories like Users, Feature Settings, Service, Embedded Service, and User Interface. The main content area is titled 'Users' under the 'SETUP' tab. It contains sections for 'Mailing Address' (Street, City, Zip/Postal Code, State/Province, Country), 'Single Sign On Information' (Federation ID), 'Locale Settings' (Time Zone set to '(GMT+05:30) India Standard Time (Asia/Kolkata)', Locale set to 'English (India)', Language set to 'English'), and 'Approver Settings' (Delegated Approver, Manager, Receive Approval Request Emails dropdown set to 'Only if I am an approver', and a checked checkbox for 'Generate new password and notify user immediately'). At the bottom are 'Save', 'Save & New', and 'Cancel' buttons.

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

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

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

User Detail:

Name	madhu b	Role	Salesforce Platform
Alias	mb	User License	Marketing User
Email	2k20csit@kiot.ac.in [Verify]	Profile	salesmanager
Username	2k20csit@kiot.ac.in	Active	<input checked="" type="checkbox"/>
Nickname	User19951684242865419206	Marketing User	<input type="checkbox"/>
Title	worker	Offline User	<input type="checkbox"/>
Company	kiot bank	Knowledge User	<input type="checkbox"/>
Department	Sales	Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address	4194, ariyangalayam, utamasolapuram, , Paraiakkadu, salem- 636308 SALEM 636308 TAMIL NADU	Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	<input checked="" type="checkbox"/>
Delegated Approver		Data.com User Type	<input type="checkbox"/>
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/>
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/>
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/>
App Registration: One-Time Password Authentication		Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>

Gmail inbox:

The inbox shows 5,318 messages. A welcome email from Salesforce is open, displaying the verification URL: <https://artificialintelligence-d-dev-ed.develop.my.salesforce.com>. The email also includes the username: 2k20csit@kiot.ac.in.

Change Your Password | Salesforce

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



Change Your Password

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

- 8 characters
- 1 letter
- 1 number

* New Password
..... Good

* Confirm New Password
..... Match

Security Question
In what city were you born?

* Answer
india

Change Password

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

Recently Viewed | Bank | Salesforce

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/o/Bank__c/list?filterName=Recent Incognito (3) Finish update

Recently Viewed

Bank

customers

Home

Search...

Bank

Recently Viewed

0 items • Updated a few seconds ago

Bank Name

New

Bank

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

List View

Recently Viewed | customers | +

Recently Viewed | customers | lightning/o/customer_c/list?filterName=Recent

Incognito (3) Finish update

Search...

customer Name

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

List View

(9) WhatsApp | Salesforce Developer Session | (128) Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce: V | Reset Password | Salesforce | Finish update

Setup Home Object Manager

Search Setup

Permission Sets

Help for this Page

Permission Sets

This page allows you to create, view, and manage permission sets. In addition, you can use the Salesforce mobile app to assign permission sets to a user. Download Salesforce from the App Store or Google Play: iOS | Android

All Permission Sets | Edit | Delete | Create New View

Action	Permission Set Label	Description	License
<input type="checkbox"/>	Access_to_ACTIVITY	Allows access to the store. Lets users see products and categories.	B2B Buyer Permission Set One Seat
<input type="checkbox"/>	Buyer	Includes all Buyer capabilities, and allows access to manage carts and...	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/>	CRM_Viewer	Denotes that the user is a Sales Cloud or Service Cloud user.	CRM User
<input type="checkbox"/>	Commerce_Admin	Allow access to commerce admin features.	Commerce Admin Permission Set License Seat
<input type="checkbox"/>	Contact_Center_Admin	Manage Service Cloud Voice contact centers that use Amazon Conn...	Service Cloud Voice User
<input type="checkbox"/>	Contact_Center_Agent	Access agent features in Service Cloud Voice contact centers that us...	Service Cloud Voice User
<input type="checkbox"/>	Contact_Center_Supervisor	Access supervisor features in Service Cloud Voice contact centers th...	Service Cloud Voice User
<input type="checkbox"/>	Experience_Profile_Manager	Lets users create, read, edit, and delete locations, sublocations, que...	Salesforce
<input type="checkbox"/>	Facility_Manager	Field Service Mobile	
<input type="checkbox"/>	FieldServiceMobileStandardPermSet	Give your mobile workforce access to the Field Service mobile app. S...	Commerce Merchandiser User Permission Set License Seat
<input type="checkbox"/>	Merchandiser	Allow access to commerce merchandising features.	Lightning Order Management User
<input type="checkbox"/>	Order_Management_Agent	Read Access to all entities enabled by Order Management	Lightning Order Management User
<input type="checkbox"/>	Order_Management_Operations_Manager	Access to all features enabled by Order Management	Lightning Order Management User
<input type="checkbox"/>	Order_Management_Shopper	Limited access to Order Management features for Self Service	Lightning Order Management User

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

<https://artificialintelligence-d-dev-ed.develop.lightning.force.com/one/app#/setup/PermSets/home>

Step 2:

Permission Sets:

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

Object-Level Security:

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

Record-Level Security:

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

Ownership:

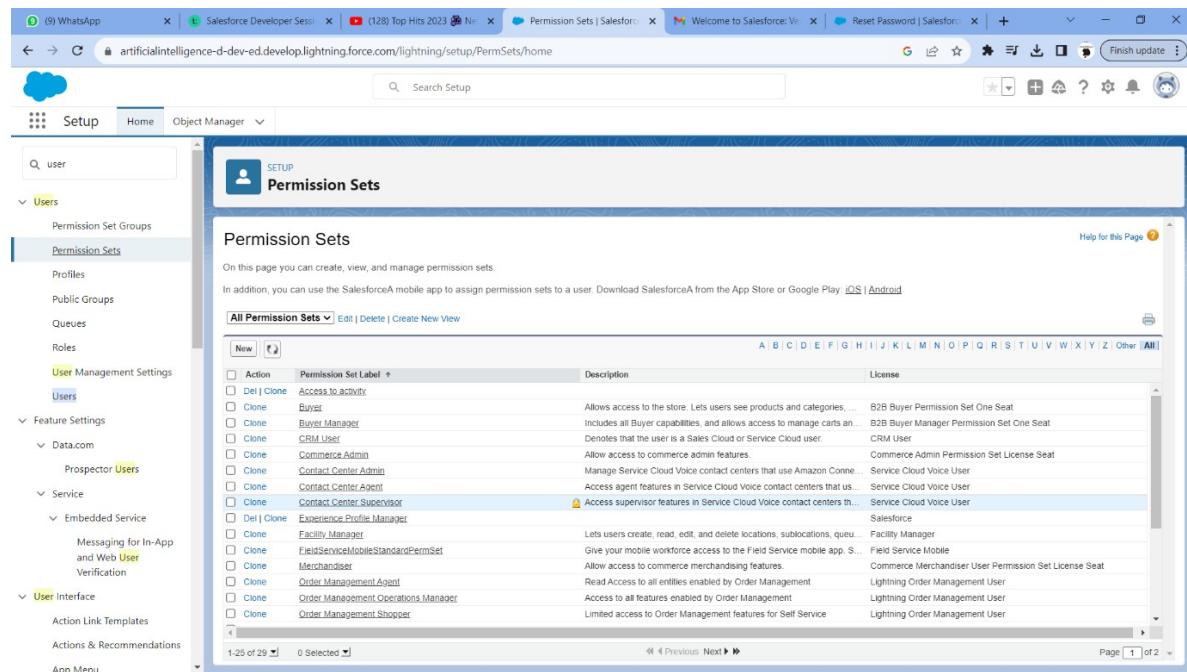
- Ensure that the Account records are owned by the respective users, with User A owning their records and User B owning their records.

Organization-Wide Defaults:

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

Testing:

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



The screenshot shows the Salesforce 'Permission Sets' page. The left sidebar navigation includes 'Setup', 'Home', 'Object Manager', and sections for 'Users' (Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles), 'User Management Settings' (Users, Feature Settings, Data.com, Prospectors, Service, Embedded Service, Messaging for In-App and Web User Verification), and 'User Interface' (Action Link Templates, Actions & Recommendations, App Menu). The main content area is titled 'Permission Sets' and displays a table of permission sets. The table columns are 'Action', 'Permission Set Label', 'Description', and 'License'. The table lists various permission sets such as 'Access_to_activity', 'Buyer', 'Buyer_Manager', 'CRM_User', 'Commerce_Admin', 'Contact_Center_Admin', 'Contact_Center_Agent', 'Contact_Center_Supervisor', 'Experience_Profile_Manager', 'Facility_Manager', 'FieldServiceMobileStandardPermSet', 'Merchandiser', 'Order_Management_Agent', 'Order_Management_Operations_Manager', and 'Order_Management_Shopper'. Each row includes a checkbox for 'Action', a link for 'Clone', and a brief description. The 'Description' column for 'Access_to_activity' states: 'Allows access to the store. Lets users see products and categories. ...'. The 'License' column for 'Access_to_activity' states: 'B2B Buyer Permission Set One Seat'. The table has a header with letters A through Z and a 'All' button. At the bottom, there are pagination controls: '1-25 of 29', '0 Selected', 'Previous', 'Next', and 'Page 1 of 2'.

Action	Permission Set Label	Description	License
<input type="checkbox"/>	Access_to_activity	Allows access to the store. Lets users see products and categories. ...	B2B Buyer Permission Set One Seat
<input type="checkbox"/>	Buyer	Includes all Buyer capabilities, and allows access to manage carts an...	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/>	Buyer_Manager		CRM User
<input type="checkbox"/>	CRM_User	Denotes that the user is a Sales Cloud or Service Cloud user.	Commerce Admin Permission Set License Seat
<input type="checkbox"/>	Commerce_Admin	Allow access to commerce admin features.	Service Cloud Voice User
<input type="checkbox"/>	Contact_Center_Admin	Manage Service Cloud Voice contact centers that use Amazon Conne...	Service Cloud Voice User
<input type="checkbox"/>	Contact_Center_Agent	Access agent features in Service Cloud voice contact centers that us...	Service Cloud Voice User
<input type="checkbox"/>	Contact_Center_Supervisor	Access supervisor features in Service Cloud Voice contact centers th...	Service Cloud Voice User
<input type="checkbox"/>	Experience_Profile_Manager	Lets users create, read, edit, and delete locations, sublocations, que...	Salesforce
<input type="checkbox"/>	Facility_Manager		Facility Manager
<input type="checkbox"/>	FieldServiceMobileStandardPermSet	Give your mobile workforce access to the Field Service mobile app. S...	Field Service Mobile
<input type="checkbox"/>	Merchandiser	Allow access to commerce merchandising features.	Commerce Merchandiser User Permission Set License Seat
<input type="checkbox"/>	Order_Management_Agent	Read Access to all entities enabled by Order Management	Lightning Order Management User
<input type="checkbox"/>	Order_Management_Operations_Manager	Access to all features enabled by Order Management	Lightning Order Management User
<input type="checkbox"/>	Order_Management_Shopper	Limited access to Order Management features for Self Service	Lightning Order Management User

Screenshot of the Salesforce Setup interface showing the 'Permission Sets' creation screen.

The left sidebar shows the navigation menu under 'Users':

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

The main content area displays the 'Create Permission Set' form:

Enter permission set information

Label	<input type="text" value=""/>
API Name	<input type="text" value=""/>
Description	<input type="text" value=""/>

Session Activation Required

Select the type of users who will use this permission set

Who will use this permission set?

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

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

License

Save Cancel

Screenshot of the Salesforce Setup interface showing the 'Permission Sets' creation screen, identical to the first one but with different input values.

The left sidebar shows the navigation menu under 'Users':

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

The main content area displays the 'Create Permission Set' form:

Enter permission set information

Label	<input type="text" value="salesmanager"/>
API Name	<input type="text" value="salesmanager"/>
Description	<input type="text" value=""/>

Session Activation Required

Select the type of users who will use this permission set

Who will use this permission set?

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

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

License

Save Cancel

Salesforce Developer Session | artificialintelligence-d-dev-ed.lightning.force.com | (128) Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce: Version 43.0 | Reset Password | Salesforce | Finish update

Permission Set Overview

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

Apps

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

User Management Settings

Object Settings

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

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Object Settings

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

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

The left sidebar shows the navigation menu under 'Users':

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

The main content area displays the 'Permission Sets' page for the 'salesmanager' permission set. The 'Object Permissions' section shows the following settings:

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

The 'Field Permissions' section shows the following settings:

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

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

The left sidebar shows the navigation menu under 'Users':

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

The main content area displays the 'Permission Sets' page for the 'salesmanager' permission set. The 'Object Permissions' section shows the following settings:

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

The 'Field Permissions' section shows the following settings:

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

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

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

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

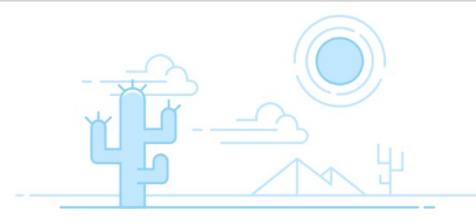
... > SETUP > PERMISSION SET 'SALESMANAGER'

salesmanager

Current Assignments

Add Assignment

No assignments defined.



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

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

Setup Home Object Manager

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

Full Name ↑	All... ↓	Username	Role	Ac... ↓	Profile
Amelia Ellington	aelli	amelia.ellington.146kxcp9oodlh.d6cwpdcu04wh.hnbdwmvwvhq.wguctpr1dalv@gmail.com	<input checked="" type="checkbox"/>		Force.com - App Subscription User
Chatter Expert	Chatty	chatty.00d5j00000bcskkeab.lo0bfwmpqike@chatter.salesforce.com	<input checked="" type="checkbox"/>		Chatter Free User
Diya Adanna	dadan	test_diya_pas.4w8bjyb9wik.tszgrgsblkexp.3g18cfovwns.hl43bkzw6mea@gmail.com	<input checked="" type="checkbox"/>		UIMS User
GOPALS	GS	kiot520@gmail.com	<input checked="" type="checkbox"/>		System Administrator
Integration User	integ	integration@00d5j00000bcskkeab.com	<input checked="" type="checkbox"/>		Analytics Cloud Integration User
madhu b	mb	2k20csit@kiot.ac.in	<input checked="" type="checkbox"/>		salesmanager
Security User	sec	insightssecurity@00d5j00000bcskkeab.com	<input checked="" type="checkbox"/>		Analytics Cloud Security User
sowmya bala	sbala	2k21it@kiot.ac.in	<input checked="" type="checkbox"/>		Manager

Cancel Next

Salesforce Developer Session | artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/PermSets/OP55j000008Phok/PermissionSetAssignment/new

Setup Home Object Manager

Select an Expiration Option For Assigned Users

No expiration date

Specify the expiration date

1 Day 1 Week 30 Days 60 Days Custom Date

Time Zone Select a time zone...

Selected Users

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

Cancel Back Assign

This screenshot shows the 'Permission Set Assignment' page in the Salesforce Setup. The user is selecting an expiration option for assigned users. The 'No expiration date' radio button is selected. Below it, there's a section for specifying an expiration date with options like '1 Day', '1 Week', '30 Days', '60 Days', and 'Custom Date'. A 'Time Zone' dropdown is also present. The 'Selected Users' table lists a single user, 'madhu b', assigned to the 'salesmanager' role with the 'Salesforce Platform' license and 'Never Expires' set. At the bottom, there are 'Cancel', 'Back', and 'Assign' buttons.

Salesforce Developer Session | artificialintelligence-d-dev-ed.lightning.force.com/one/app#/key/jb21wb25lnREZWYiOijzXR1cf9wbGF0Zm9ybV9wZXJtczpwc2FSZXN1bHRQYWdlIw... | Finish update

Setup Home Object Manager

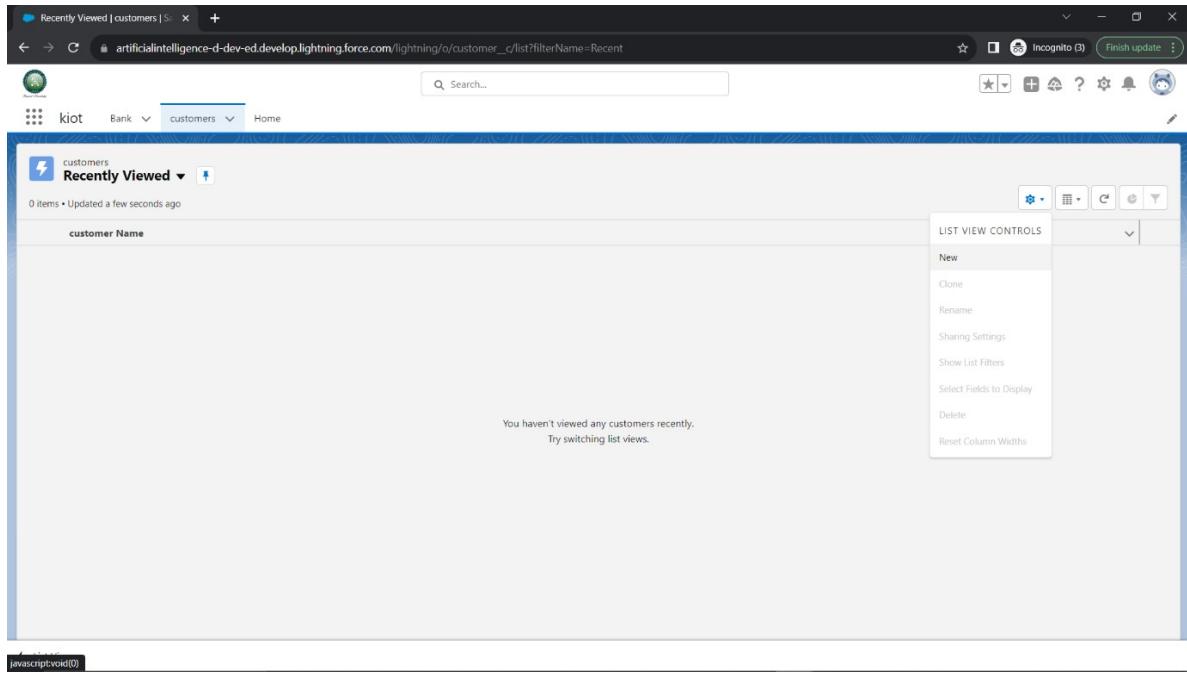
PERMISSION SET 'SALESMANAGER' assignments were successful.

Assignment Summary

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

Done

This screenshot shows the 'Assignment Summary' page after the permission set assignment was completed. It displays a success message: 'PERMISSION SET 'SALESMANAGER' assignments were successful.' The summary table shows one assignment made to 'madhu b' with the 'Salesforce Platform' license. The status is marked as 'Success'. At the bottom right, there is a 'Done' button.

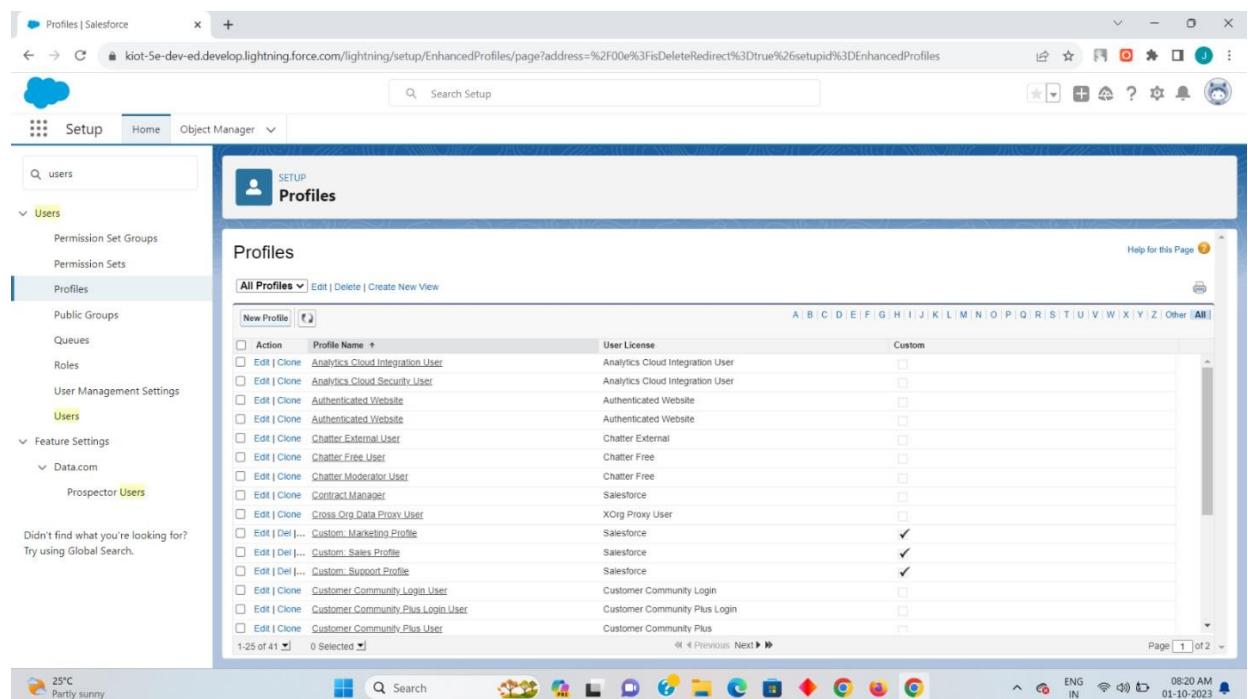


3. . Suppose there are 2 Users and they are having Create, Read, Edit access on Account Object with the same profile but we want to open up the access for one user to delete how will you implement the Security setting.

Solution:

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

Setup-quick search[profile]

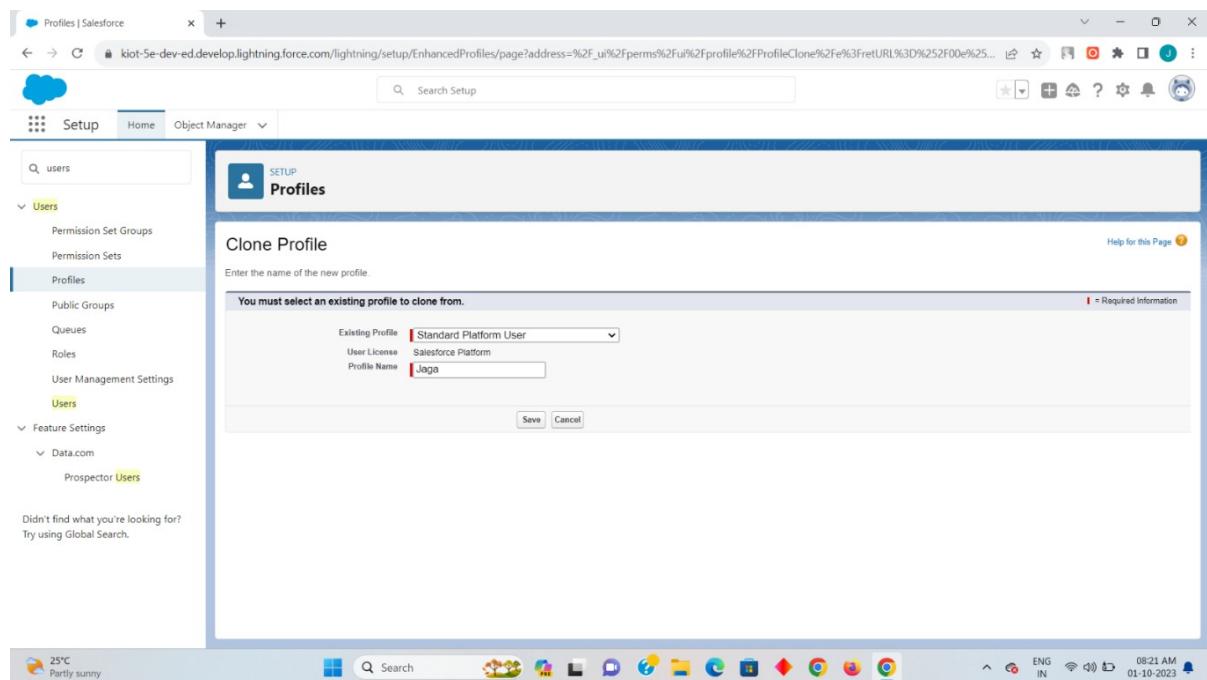


The screenshot shows the Salesforce Setup interface with the following details:

- Page Header:** Profiles | Salesforce
- Search Bar:** Search Setup
- Left Navigation:** Setup, Home, Object Manager, and a sidebar with sections like Users, Feature Settings, and Data.com.
- Current Page:** Profiles
- Table Headers:** All Profiles, Edit | Delete, Create New View, User License, Custom.
- Table Data:** A list of profiles with their names, user licenses, and edit/clone permissions. Some profiles have checkmarks in the edit/clone columns.
- Bottom Navigation:** Page 1 of 2, Previous, Next, and a status bar showing 25°C Partly sunny, ENG IN, 08:20 AM, 01-10-2023.

Step 2:

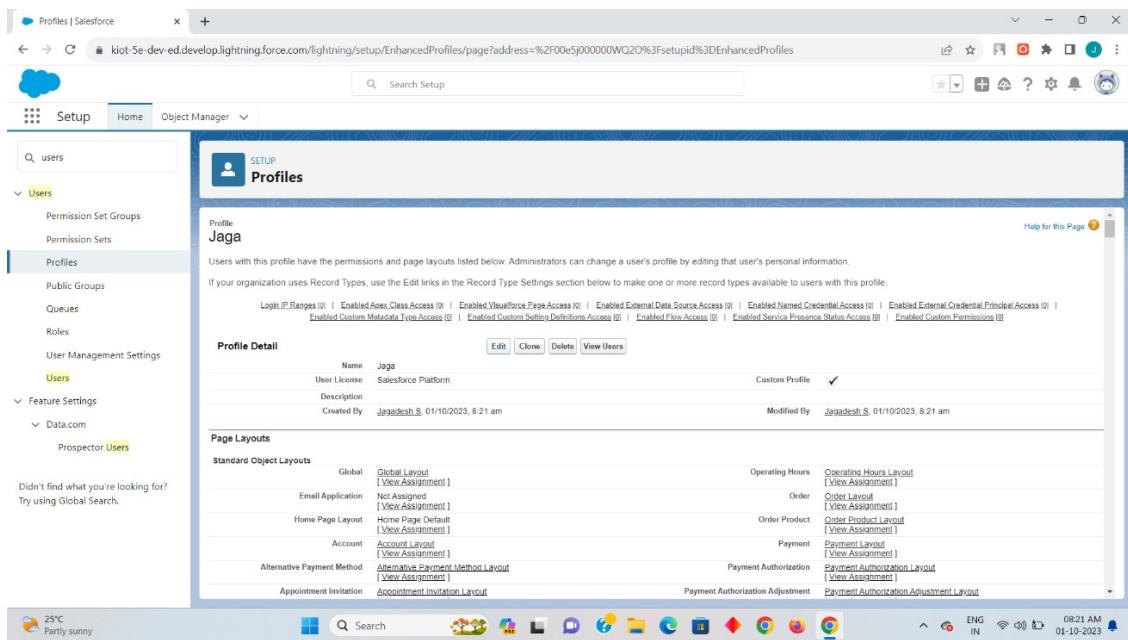
Click on the new to create a new profile along with the label and Api



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

Step 3:

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



Profiles | Salesforce

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

Setup Home Object Manager

Search Setup

Cloud icon

SETUP Profiles

Communication Subscription Consents

Communication Subscription Timings

Contacts

Contact Point Addresses

Contact Point Consents

Contact Point Emails

Locations

Party Consents

Push Topics

Sellers

Streaming Channels

User External Credentials

Custom Object Permissions

Basic Access Data Administration

Read Create Edit Delete View All Modify All

Providers Resources

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Enable different Experience Cloud login policies for employees:

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

25°C Partly sunny

Search bar

Taskbar icons

System status: ENG IN 08:21 AM 01-10-2023

Profiles | Salesforce

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

Setup Home Object Manager

Search Setup

Cloud icon

SETUP Profiles

Communication Subscription Consents

Communication Subscription Timings

Contacts

Contact Point Addresses

Contact Point Consents

Contact Point Emails

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Party Consents

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Custom Object Permissions

Basic Access Data Administration

Read Create Edit Delete View All Modify All

Providers Resources

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Enable different Experience Cloud login policies for employees:

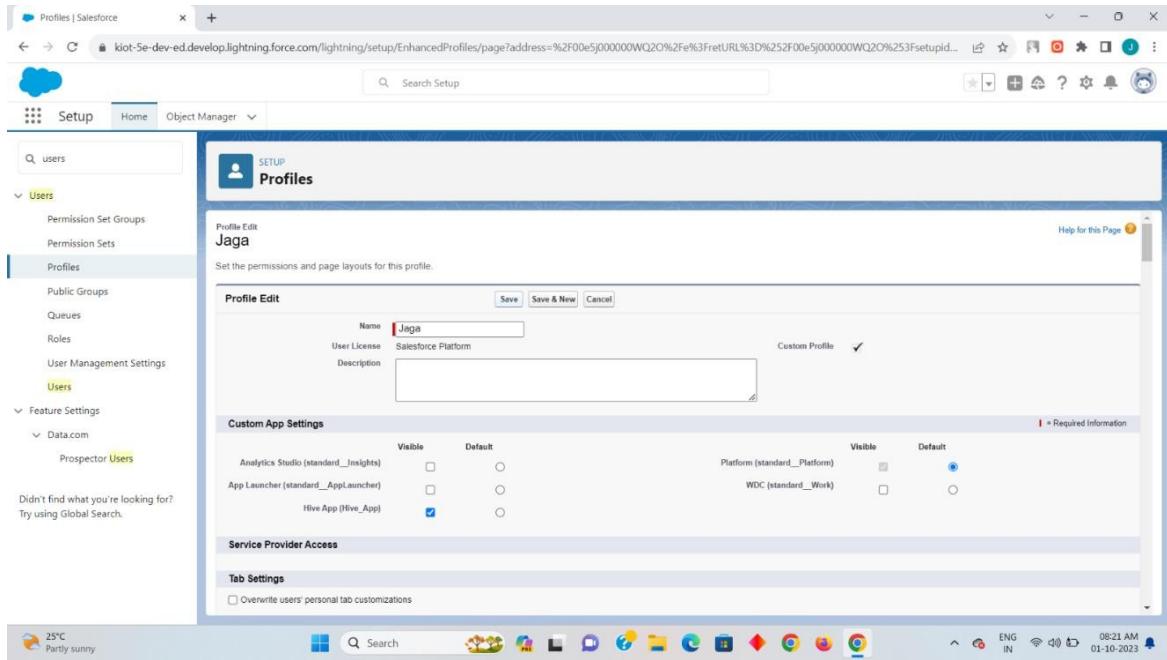
- Separate Experience Cloud site and Salesforce login authentication for employees.
- Relax login IP restrictions.
- Skip employee device activation during Experience Cloud site login.

25°C Partly sunny

Search bar

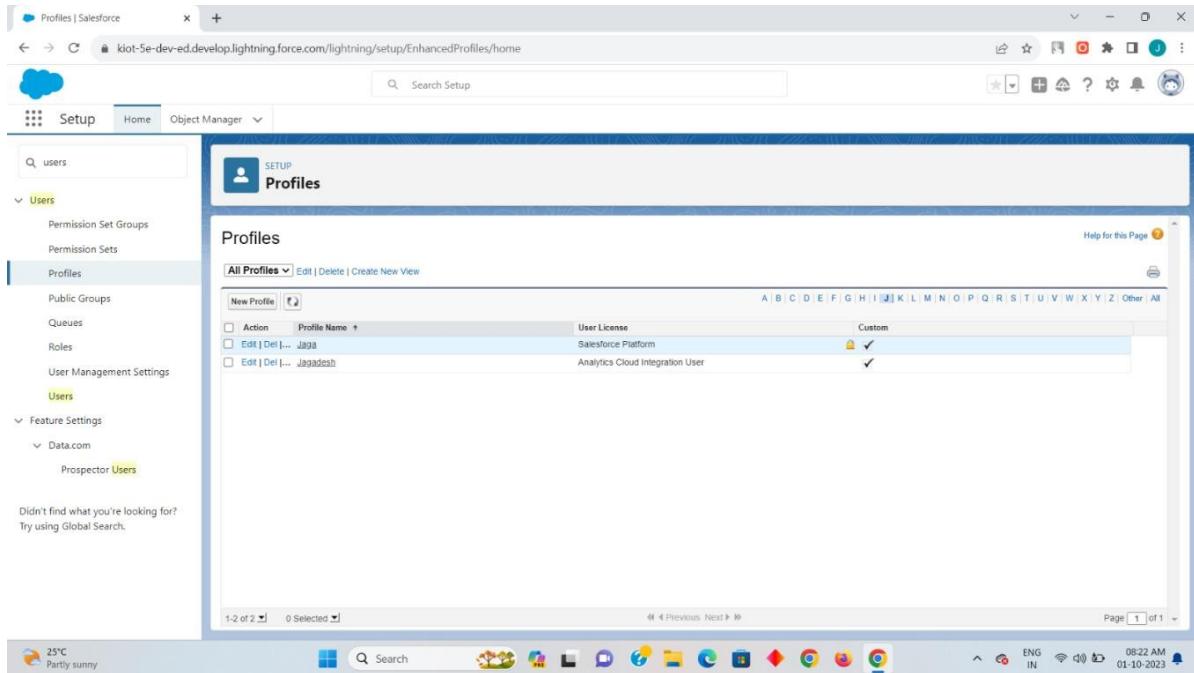
Taskbar icons

System status: ENG IN 08:21 AM 01-10-2023



Step 4

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



Step 5:

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

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

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

- Page Title:** Users | Salesforce
- URL:** kiot-5e-dev-ed.lightning.force.com/lightning/setup/ManageUsers/home
- Section:** Users
- Sub-section:** All Users
- Table Headers:** Action, Full Name, Alias, Username, Role, Active, Profile
- Data:**

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Chatter_Expert	Chatter	chatty_00d500000c0joseaf5z7pbkrk04@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	Grey_Jane	jgrey	jane_gray_fynamroaim_cz7d2ko0tn3@gmail.com		<input checked="" type="checkbox"/>	Customer Community User
<input type="checkbox"/>	S_Jaga	JS	jaga05@gmail.com	CEO	<input type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	S_Jagadesh	JS	w0w@gmail.com	SF Admin	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	S_Jagadesh	JS	jaga1117@gmail.com	Channel Sales Team	<input type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	User_Integration	integ	integration@00d500000c0joseaf.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	User_Security	sec	insightssecurity@00d500000c0joseaf.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User
- Buttons:** New User, Reset Password(s), Add Multiple Users
- Page Navigation:** 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
- Page Footer:** Help for this Page, Didn't find what you're looking for? Try using Global Search, Weather (25°C, Partly sunny), System Status (Windows 10, ENG IN, 08:22 AM, 01-10-2023)

Users | Salesforce

kiot-5e-dev-ed.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005%2Fe%3Fr?url%3D%252F005%253FisUserEntityOverride%253D1%2526retURL%...

Setup Home Object Manager

Users

New User

User Edit

General Information

First Name	Jagadesh11
Last Name	S
Alias	js
Email	jwv123@gmail.com
Username	jwv123@gmail.com
Nickname	User169612875144062502
Title	
Company	
Department	
Division	

Role: Director, Channel Sales

User License: Salesforce Platform

Profile: None

Active: Yes

Marketing User: Standard Platform User

Office User:

Knowledge User:

Flow User:

Service Cloud User:

Site.com Contributor User:

Site.com Publisher User:

WDC User:

Data.com User Type: None

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

Accessibility Mode (Classic Only):

High-Contrast Palette on Charts:

Help for this Page

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

25°C Partly sunny

Users | Salesforce

kiot-5e-dev-ed.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005%2Fe%3FappLayout%3Dsetup%26retURL%3D%252F005%253FisUserEntityOverride%253D1%2526retURL%...

Setup Home Object Manager

Users

New User

User Edit

General Information

First Name	Jagadesh22
Last Name	S
Alias	js
Email	jw1@gmail.com
Username	jw1@gmail.com
Nickname	User16961287983618745
Title	
Company	
Department	
Division	

Role: Marketing Team

User License: Salesforce Platform

Profile: None

Active: Yes

Marketing User: Standard Platform User

Office User:

Knowledge User:

Flow User:

Service Cloud User:

Site.com Contributor User:

Site.com Publisher User:

WDC User:

Data.com User Type: None

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

Accessibility Mode (Classic Only):

High-Contrast Palette on Charts:

Help for this Page

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

25°C Partly sunny

Users | Salesforce

kiot-5e-dev-ed.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005%2FappLayout%3Dsetup%26isUserEntityOverride%3D1%26fdcFrameHost%3Dw...

Setup Home Object Manager

Users

All Users

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

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

View: All Users | Edit | Create New View

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	<input type="checkbox"/> Edit Delete	js	jwv123@gmail.com	CEO	<input type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	<input type="checkbox"/> Edit Delete	js_jagadeesh	jwv123@gmail.com	SP Admin	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	<input type="checkbox"/> Edit Delete	js_jagadeesh	jwv123@gmail.com	Channel Sales Team	<input type="checkbox"/>	Standard Platform User
<input checked="" type="checkbox"/>	<input type="checkbox"/> Edit Delete	js_jagadeesh11	jwv123@gmail.com	Director, Channel Sales	<input checked="" type="checkbox"/>	Jaga
<input checked="" type="checkbox"/>	<input type="checkbox"/> Edit Delete	js_jagadeesh22	jw1@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	js09

New User | Reset Password(s) | Add Multiple Users

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

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

25°C Partly sunny

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

Step 6:

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

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

Permission Sets | Salesforce

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

Setup Home Object Manager

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Prospect User

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

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

All Permission Sets | Edit | Delete | Create New View

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

1-25 of 30 0 Selected

Page 1 of 2

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

25°C Partly sunny

Search

ENG IN 0624 AM 01-10-2023

Permission Sets | Salesforce

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

Setup Home Object Manager

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Prospect User

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

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

Create

Enter permission set information

Label: API Name: Description:
 Session Activation Required

Select the type of users who will use this permission set

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

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

License:

Save Cancel

25°C Partly sunny

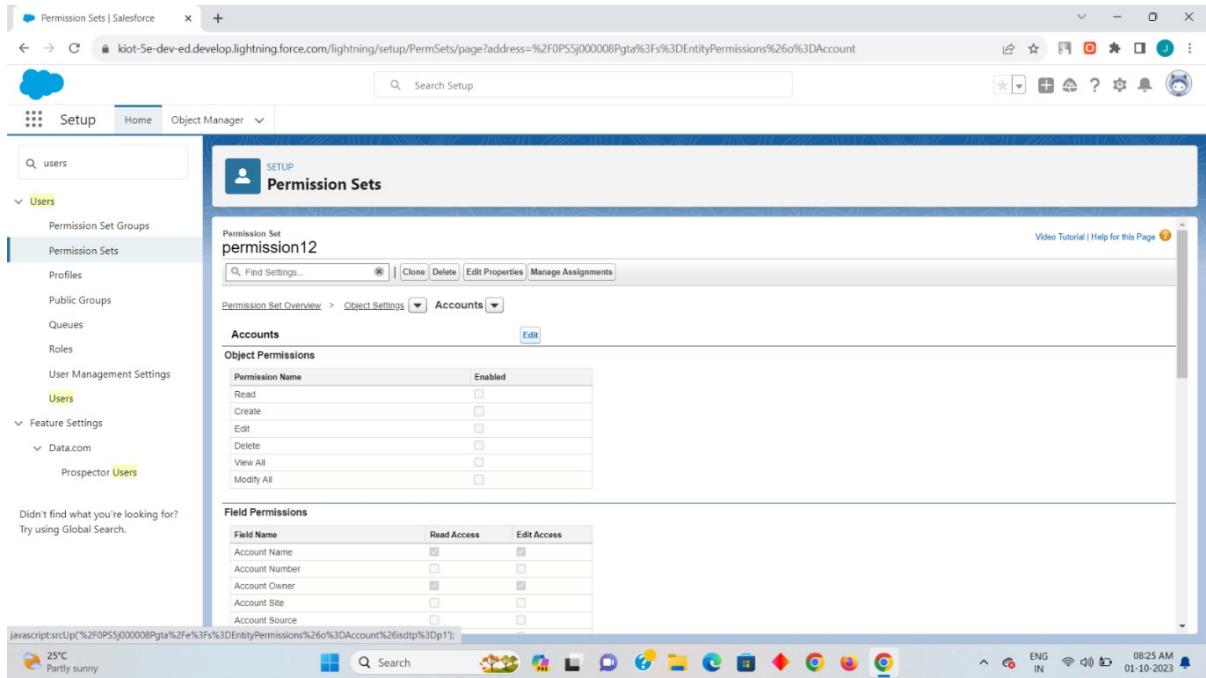
Search

ENG IN 08:24 AM 01-10-2023

The screenshot shows the Salesforce Setup interface with the 'Permission Sets' tab selected. A new permission set named 'permission12' is being created. The 'Permission Set Overview' section displays basic information: API Name 'permission12', Namespace Prefix 'Namespace_Prefix', Created By 'Japadeesh_S' on '01/10/2023, 8:24 am', and Session Activation Required status. The 'Apps' section lists various app-related permissions: Assigned Apps, Assigned Connected Apps, Object Settings, App Permissions, Apex Class Access, Visualforce Page Access, and External Data Source Access.

The screenshot shows the Salesforce Setup interface with the 'Permission Sets' tab selected. A search bar at the top right contains the query 'users'. The left sidebar lists various categories under 'Users' and 'Feature Settings'. The main content area displays the 'Object Settings' for the permission set 'permission12'. The table lists object names and their corresponding permissions, total fields, and tab settings.

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



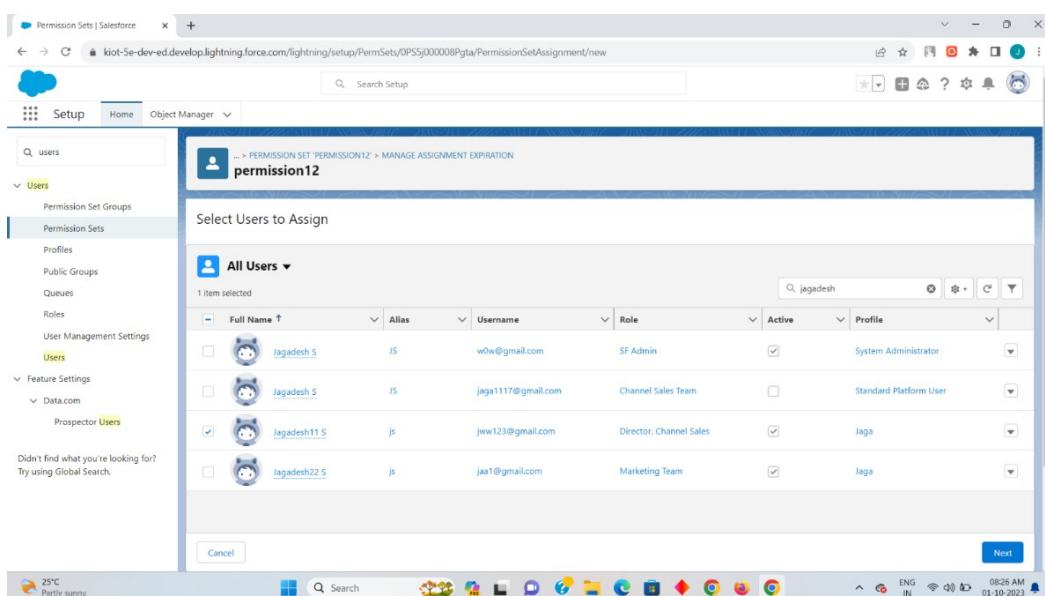
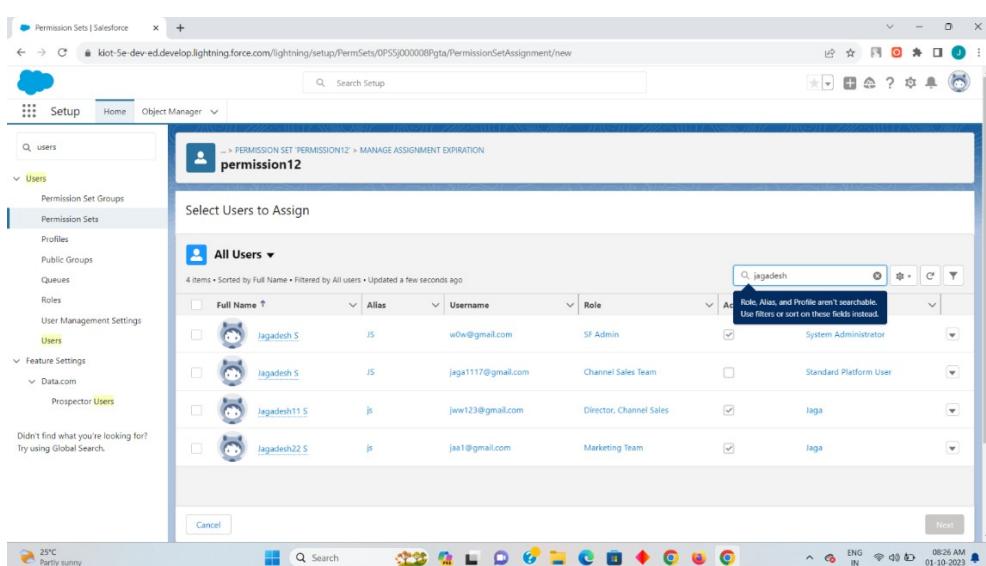
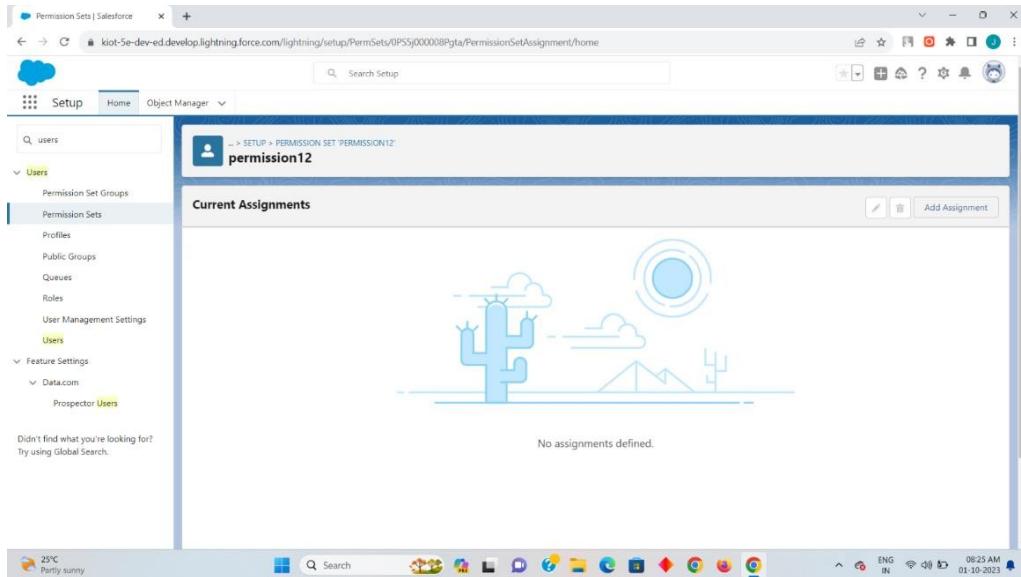
Step 7:

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

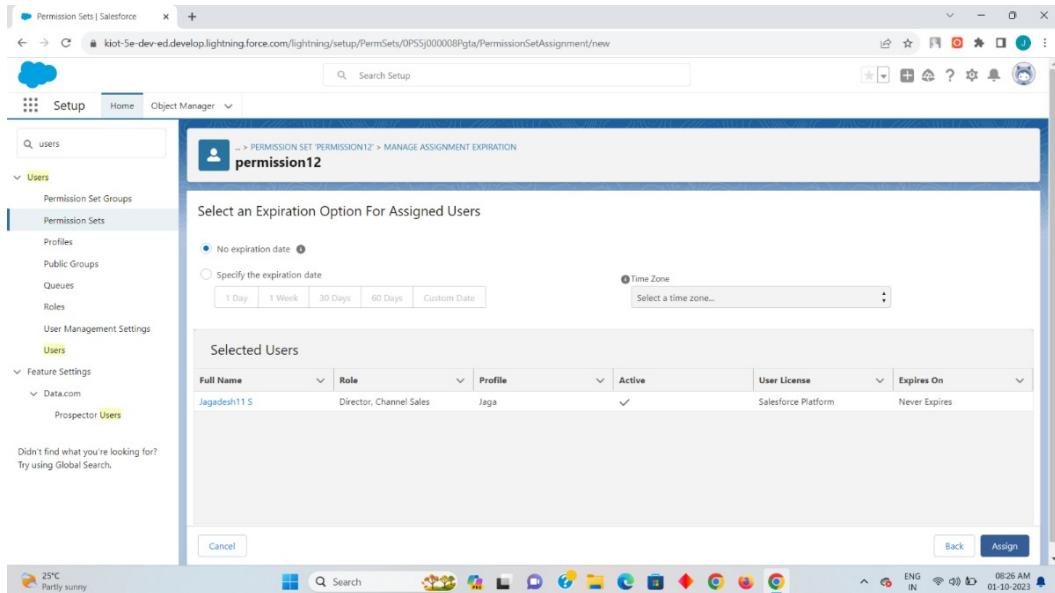
The screenshots show the Salesforce Setup interface for creating a Permission Set. The left sidebar navigation includes 'Setup', 'Home', 'Object Manager', and sections for 'Users' (Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings), 'Feature Settings' (Data.com, Prospectors), and 'Prospector Users'. The main content area displays the 'Permission Sets' page for 'permission12'. The 'Accounts' object settings are shown, with the 'Object Permissions' section listing 'Permission Name' (Read, Create, Edit, Delete, View All, Modify All) and their 'Enabled' status. The 'Field Permissions' section lists 'Field Name' (Account Name, Account Number, Account Owner, Account Site, Account Source) and 'Read Access' and 'Edit Access' checkboxes. In the second screenshot, the 'Delete' checkbox under Object Permissions is checked. In the third screenshot, the 'Delete' checkbox is checked and the 'Save' button is highlighted.

Step 8

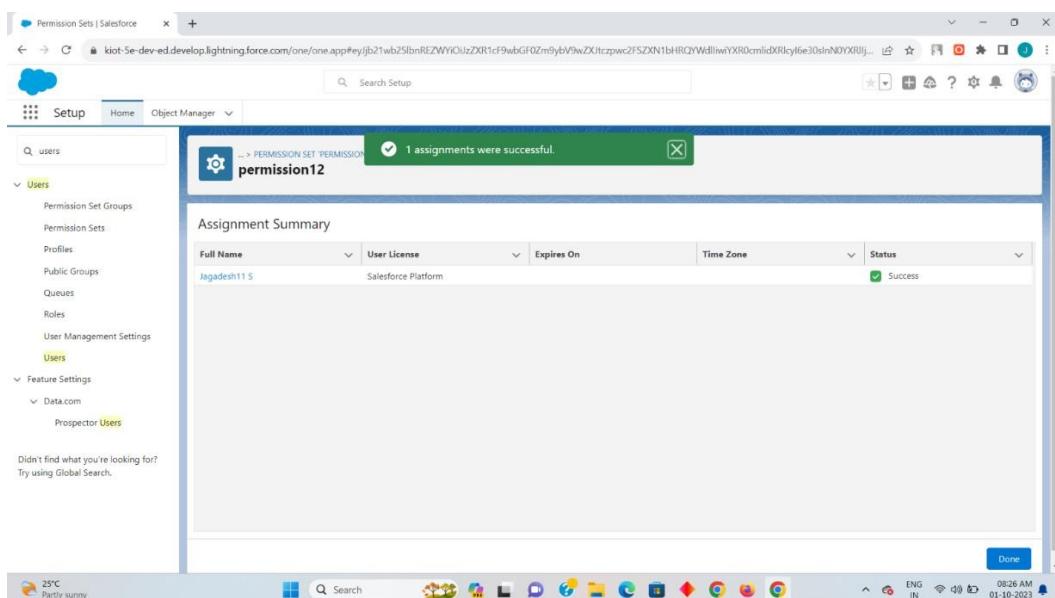
Now click on add assignment there you will find your two created users click on any one user to give a special access as delete on it and then click on assign so that the specific selected user can have a special access as delete on it.



Click on next.



Now click on Assign.



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

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

Solution:

Step 1: Create a Custom Object

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

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

SETUP > OBJECT MANAGER

Survey Result

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

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

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

Email Template
Thank You Email - Survey

Details Related

Information

Email Template Name Thank You Email - Survey	Related Entity Type Survey Result
Description	Folder Public Email Templates
Made in Email Template Builder <input checked="" type="checkbox"/>	

Message Content

Subject Thank You For Completing Our Survey!	Enhanced Letterhead
HTML Value	<p>Hi {{Survey_Result__c.Name__c}},</p> <p>Thanks for taking time out to participate in our survey. We are very appreciative of the time you have taken to assist in our analysis, and commit to utilizing the information gained to contemplate and implement worthwhile improvements. We will share these results with you through your State Survey Agency, whom we also thank for their generous participation.</p> <p>Once again, we are extremely grateful for your contributing your valuable time, your honest information, and your thoughtful suggestions.</p> <p>Thanks, Automation Champion</p>

Additional Information

Created By Rakesh Gupta , 12/21/2020, 4:23 PM	Last Modified By Rakesh Gupta , 12/21/2020, 4:32 PM
--	--

Step 3: Create an Email Alert

1. Click **Setup**.
2. In the Quick Find box, type **Email Alerts**.
3. Select **Email Alerts**, click on the **New Email Alert** button.
4. Name the **Email Alert** and click the Tab button. The **Unique Name** will populate.

- 5. For Object select Survey Result.**
- 6. For the Email Template chooses Lightning Email Template Thank You Email – Survey.**
- 7. For Recipient Type select Email Field: Email.**
- 8. Click Save.**

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

Description: Survey - Thank You Email

Unique Name: Survey_Thank_You_Email

Object: Survey Result

Email Template: Thank You Email - Survey

Protected Component:

Recipient Type: Search: User for: Find

Recipients	Available Recipients	Selected Recipients
	User: Integration User User: Rakesh Gupta User: Security User	Email Field: Email
	Add ▶ ◀ 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_a Comment X
Email__c	← A_a Email > Value X
Name__c	← {!Name.firstName} {!Name.lastName}
Rating__c	← A_a Rating X

+ 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.

Edit "Survey - Thank You Email" email alert

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

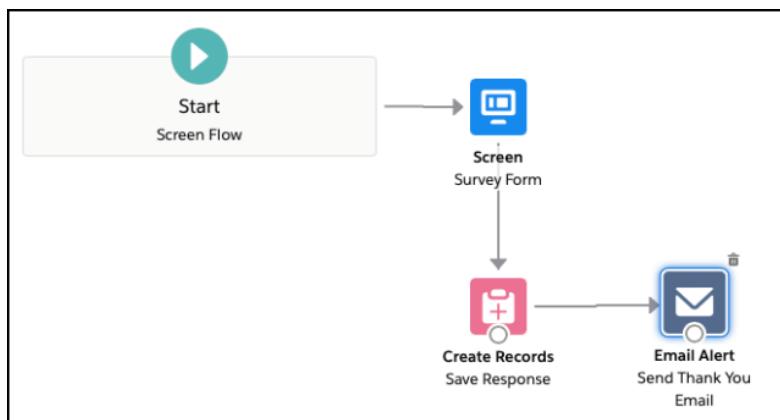
* Label	* API Name
Send Thank You Email	Send_Thank_You_Email
Description	

Set Input Values

* Record ID
{!Save_Response}

Cancel Done

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



1. Click Save.

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

3. Click **Show Advanced**.

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

5. Type: Screen Flow

6. API Version for Running the Flow: 51

7. Interview Label: Survey

{!\$Flow.CurrentDateTime}

8. Click Save.

Save as

A New Version **A New Flow**

* Flow Label

* Flow API Name

Description

Hide Advanced

How to Run the Flow

* Type

* API Version for Running the Flow

Interview Label

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

Status: **Active** Type: **Screen Flow** Version Number: **2**

Cancel **Save**

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

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

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

The screenshot shows the Salesforce Lightning App Builder interface. At the top, there's a navigation bar with options like File, Edit, Debug, Test, Workspace, Help, and a back/forward button. Below the navigation is a tab bar with 'VFPageToLC.app *'. The main area contains the following code:

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

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

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

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

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

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

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

The screenshot shows the 'Visualforce Page Survey' setup screen. The 'Page Information' section includes fields for Label (Survey), Name (Survey), Description, and checkboxes for 'Available for Lightning Experience, Experience Builder editor, and the mobile app' (checked) and 'Require CSRF protection on GET requests' (unchecked). Below this is the 'Visualforce Markup' tab, which displays the following code:

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

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

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

1. Click **Setup**.

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

Site Edit

Save **Cancel**

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

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

Proof of Concept

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

Survey

Name

First Name
Alok

Last Name
Sinfal

Email
[REDACTED]

Rating
5

Comment
Awesome Blog 

Next

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

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

 **Survey Site Guest User** [via b9amq6fe7r-b-cdzwmaa.gs0.bnc.salesforce.com](#) to me  8:09 PM (1 minute ago)   

Hi Alok Sinfal,

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

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

Thanks,
Automation Champion