

NAAN MUDHALVAN

ASSIGNMENT

on

[SALESFORCE]

**CREATION OF AN APPLICATION
FOR SCHOOL MANAGEMENT**

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

Solution:

Step 1: Create Custom Objects

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

Setup Home Object Manager

New Custom Object

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more](#) [Don't show this message again](#)

Custom Object Definition Edit [Save](#) [Save & New](#) [Cancel](#)

Custom Object Information: ! Required Information

The singular and plural labels are used in APIs, page layouts, and reports.

Label: **Example:** Account

Plural Label: **Example:** Accounts

Start with vowel sound:

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

Object Name: **Example:** Account

Description:

Context-Sensitive Help Setting:

- Open the standard Salesforce.com Help & Training window
- Open a window using a Visualforce page

Contact Name:

Enter Record Name Label and Format: [What is this?](#)

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

Record Name: **Example:** Account Name

Data Type:

Optional Features: [What is this?](#)

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

Object Classification: [What is this?](#)

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

- Allow Sharing
- Allow Bulk API Access
- Allow Streaming API Access

Deployment Status: [What is this?](#)

- In Development
- Deployed

Search Status: [What is this?](#)

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 tab and list to default page layout
- Launch New Custom Tab Wizard after saving this custom object

[Save](#) [Save & New](#) [Cancel](#)

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

The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. A message at the top states: "Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more](#) | [Don't show this message again](#)".

Custom Object Definition Edit

Custom Object Information:

- Label: Department (Required)
- Plural Label: Departments (Required)
- Description: (Empty text area)
- Context Sensitive Help Setting:
 - Open the standard Salesforce.com Help & Training window
 - Open a window using a Visualforce page
- Contact Name: (Empty dropdown menu)

Enter Record Name Label and Format:

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

Record Name: Department Name (Required)

Data Type: Text

Optional Features:

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

Object Classification:

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

- Allow Sharing
- Allow Bulk API Access
- Allow Streaming API Access

Deployment Status:

- In Development
- Deployed

Search Status:

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

- Allow Search

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

- Add Notes and Attachments Related List to default page layout
- Launch New Custom Tab Wizard after saving this custom object

Buttons: Save, Save & New, Cancel

Step 2: Create a Master-Detail Relationship

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

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

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

Setup | Home | Object Manager

SETUP > OBJECT MANAGER
CDepartment

Details

Fields & Relationships	Details
Page Layouts	Description
Lightning Record Pages	API Name: CDepartment__c
Buttons, Links, and Actions	Custom
Compact Layouts	Singular Label: CDepartment
Field Sets	Plural Label: CDepartments
Object Limits	
Record Types	
Related Lookup Filters	
Restriction Rules	
Scoping Rules	
Triggers	
Flow Triggers	
Validation Rules	
	Enable Reports
	Track Activities
	Track Field History
	Deployment Status
	Deployed
	Help Settings
	Standard: salesforce.com Help Window

Edit | Delete

Setup | Home | Object Manager

SETUP > OBJECT MANAGER
CDepartment

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

New Relationship

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

Field Label: College

Field Name: College

Description:

Help Text:

Child Relationship Name: CDepartment

Sharing Setting:

Select the minimum access level required on the Master record to create, edit, or delete related Detail records.

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

ReadWrite: Allows users with at least ReadWrite access to the Master record to create, edit, or delete related Detail records.

Allow re-parenting:

Child records can be re-parented to other parent records after they are created.

Auto add to custom report type:

Add this field to existing custom report types that contain this entry.

Lookup Filter

Help for this Page

Step 3 of 8

Previous | Next | Cancel

The screenshot shows the Salesforce Setup interface for creating a new relationship. The left sidebar lists various configuration options under 'Fields & Relationships'. The main panel is titled 'New Relationship' and is on 'Step 2: Choose the related object'. It shows a dropdown menu where 'college' has been selected as the related object. Navigation buttons for 'Previous', 'Next', and 'Cancel' are visible at the bottom.

The screenshot shows the Salesforce Setup interface for creating a new custom field. The left sidebar lists various configuration options under 'Fields & Relationships'. The main panel is titled 'New Custom Field' and is on 'Step 1: Choose the field type'. Under 'Data Type', the 'Roll Up Summary' option is selected. A detailed description of this field type is provided, explaining it creates a summary 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. Navigation buttons for 'Next' and 'Cancel' are visible at the bottom.

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.

The screenshot shows the Salesforce Object Manager interface for the 'CDepartment' object. The 'Fields & Relationships' section is active, displaying a table of fields:

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

Setup Home Object Manager

Q_ tabs

User Interface

Rename Tabs and Labels

Custom Tabs

Help for this Page

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

Custom Object Tabs

Action	Label	Tab Style	Description
Edit Del	Book	Box	
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.

Setup Home Object Manager

SETUP > OBJECT MANAGER college

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

New Custom Field

Step 5: Add to page layouts Step 5 of 5

Field Label: Total count
Data Type: Record Summary
Field Name: Total_count
Description:

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

Add Field Page Layout Name college Layout

Previous Save & New Save Cancel

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

Previous Save & New Save Cancel

Setup | Home | Object Manager | college

SETUP > OBJECT MANAGER college

Details

Fields & Relationships

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Restriction Rules
- Scoping Rules
- Triggers
- Flow Triggers
- Validation Rules

New Custom Field

Step 4 of 5

Field Label: Total count
Data Type: RollUp 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.

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"/>
Customer Support Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Customer	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Forrester - Ann Reservation User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Help for this Page

Step 3 of 5

Select Object to Summarize

Master Object: college
Summarized Object: Departments

Select Roll-Up Type

COUNT
 SUM
 MIN
 MAX

Field to Aggregate: —Territory—

Filter Criteria

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

Previous | Next | Cancel

Setup | Home | Object Manager | college

SETUP > OBJECT MANAGER college

New Custom Field

Step 2. Enter the details Step 2 of 5

Field Label	Total count
Field Name	Total_count
Description	
Help Text	

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

Previous Next Cancel

Setup | Home | Object Manager | college

SETUP > OBJECT MANAGER college

New Custom Field

Step 1. Choose the field type Step 1

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

Data Type

- None Selected Select one of the data types below.
- Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
- Formula A read-only field that derives its value from a formula expression you define. This 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 pop-up 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 relationship field is required on all detail records.
 - The ownership and sharing of a detail record are determined by the master record.
 - When you define the master record, all detail records are defined.
 - You can create sales 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.
- True/False Allows users to select a True (checked) or False (unchecked) value.

Next Cancel

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'SETUP > OBJECT MANAGER college'. On the left, a sidebar lists various configuration options like Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, Scoping Rules, Triggers, Flow Triggers, and Validation Rules. The central panel is titled 'Fields & Relationships' and displays a table with four items. The table columns are 'FIELD LABEL', 'FIELD NAME', 'DATA TYPE', 'CONTROLLING FIELD', and 'INDEXED'. The data is as follows:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
college Name	Name	Text(10)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User/Group)		✓

Step 4: Create a Lightning App

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

10. Assign the app to users or profiles.

11. Test the app with the assigned users.

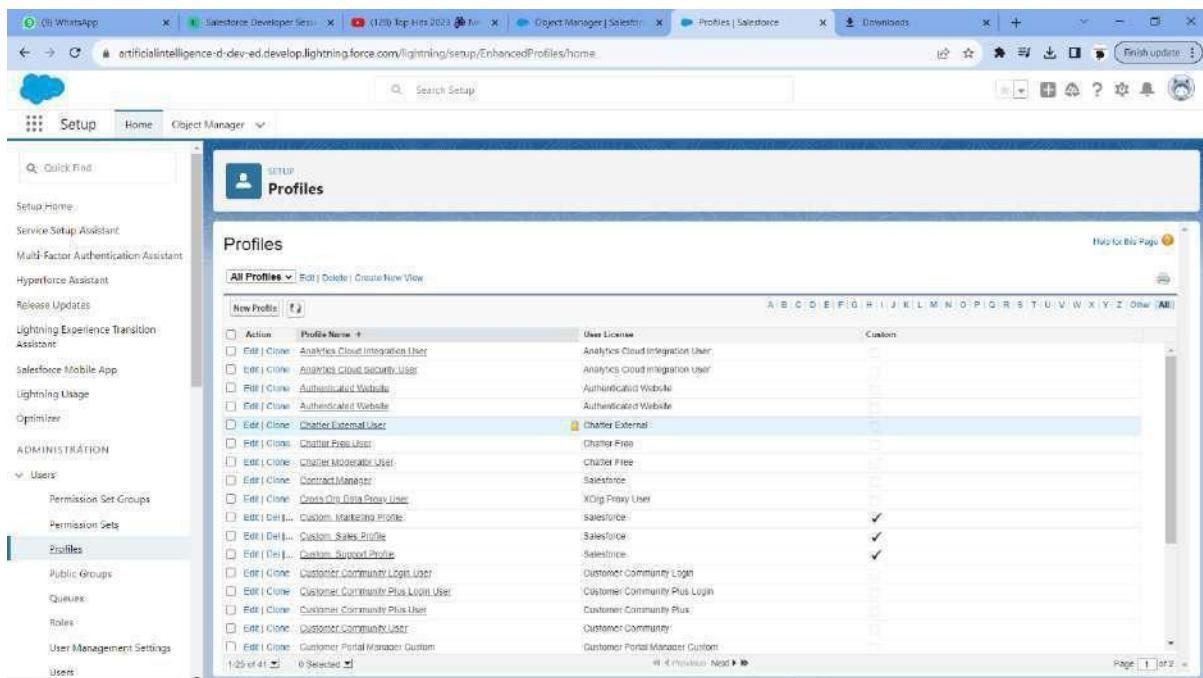
The screenshot shows the Salesforce Setup interface with the 'Tabs' tab selected. The page title is 'New Custom Object Tab'. A sub-header indicates 'Step 2: Add to Profiles' and 'Step 2 of 3'. The main content area displays a list of user profiles on the left and their corresponding 'Tab Visibility' settings on the right. The 'Tab Visibility' column contains dropdown menus for each profile, all currently set to 'Default On'. At the bottom of the page are 'Previous', 'Next', and 'Cancel' buttons.

Profile	Tab Visibility
Analytics Cloud Integration User	Default On
Analytics Cloud Security User	Default On
Authenticated Website	Default On
Authorized Website	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 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
Researcher	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

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 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, Users (with sub-links for Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and Users), and a Help section. The main content area displays a table of profiles. The columns are 'Action', 'Profile Name', 'User License', and 'Custom'. The 'User License' column lists various Salesforce licenses like Analytics Cloud Integration User, Analytics Cloud Integration User+, Authentication Website, etc. The 'Custom' column contains several checked checkboxes. The table has a header row with letters A through Z and a 'More' link. At the bottom, it shows '1-25 of 41' profiles and a '0 Selected' button. A status bar at the bottom right indicates 'Page 1 of 2'.

Salesforce Developer Session

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

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Hyperforce Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

ADMINISTRATION

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Search Setup

Profiles

All Profiles | Edit | Delete | Create New View

New Profile | f

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 | A:

Action	Profile Name	User License	Custos
<input type="checkbox"/> Edit Clone	System API Only - System Integrations	Salesforce Integration	
<input type="checkbox"/> Edit Delete	System Manager	Salesforce	
<input type="checkbox"/> Edit Clone	Standard Platform User	Standard Platform	
<input type="checkbox"/> Edit Clone	System Manager	Salesforce	
<input type="checkbox"/> Edit Clone	Standard Platform User	Salesforce Platform	
<input type="checkbox"/> Edit Clone	Standard User	Salesforce	
<input type="checkbox"/> Edit Clone	System Administrator	Salesforce	

1 of 7 | 0 Selected | Page 1 of 1

Salesforce Developer Session

artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page/address%2Fui%2Fperm%2Fprofile%2FprofileClone%2F%2F...

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

Search Setup

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

Save Cancel

Salesforce Developer Series | 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

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: Manager

Save Cancel

Salesforce Developer Series | 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

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

Name	Manager	Custom Profile	
User License	Salesforce Platform	<input checked="" type="checkbox"/>	
Description			
Created By	GOPALE_01/10/2020, 7:00 pm	Modified By	GOPALE_01/10/2020, 7:00 pm

Page Layouts

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

Salesforce Developer Session

Object Manager | Salesforce

Profiles | Salesforce

Search Setup

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Hyperforce Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

ADMINISTRATION

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Manager

Set the permissions and page layouts for this profile.

Profile Edit

Name: Manager
User License: Salesforce Platform
Description:

Custom Profile:

Custom App Settings

Analytics Studio (standard__Analytics): Default

App Launcher (standard__AppLaunchers): Default

Kit (kot):

Platform (standard__Platform): Default

WDC (standard__Work):

Service Provider Access

Tab Settings

Overwrite users' personal tab customizations:

Standard Tab Settings

Home: Default On
Accounts: Default On
Alert Settings: Default On

Leaving: Default On
Locations: Tab Hidden
Lightning Bolt Solutions: Default On

Save | Save & New | Cancel

Salesforce Developer Session

Object Manager | Salesforce

Profiles | Salesforce

Search Setup

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User Management Settings

Users

Manager

Communication Subscription Channel Types

Communication Subscription Consents	Communication Subscription Timings	Contacts	Individuals	Locations	Party Contracts	Push Topics	Sellers	Streaming Channels	User External Credentials
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
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The screenshot shows the Salesforce Setup interface with the following details:

- 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, and ADMINISTRATION.
- Current Page:** Profiles
- Content Area:**
 - Profiles Section:** Shows Contact Point Addresses, Contact Point Consents, Contact Point Emails, Sellers, Streaming Channels, and User External Credentials with checkboxes indicating permission levels.
 - Custom Object Permissions Section:** Shows permissions for Bank and customers objects across Read, Create, Edit, Delete, View All, and Modify All categories.
 - Session Settings Section:** Session Times Out After (2 hours of inactivity), Session Security Level Required at Login (None).
 - Password Policies Section:** User passwords expire in (90 days), Enforce password history (3 passwords remembered), Maximum password length (8), Password complexity requirement (Must include alpha and numeric characters), Password question requirement (Cannot contain password), Maximum invalid logins attempt (10), and License activation period (15 minutes).

The screenshot shows the Salesforce Setup Home interface with the 'Profiles' tab selected under 'User Management'. The main content area displays the 'Custom Object Permissions' section for the 'Bank' object. It includes a table for basic access (Read, Create, Edit, Delete) and data administration (View All, Modify All). Below this, there's a section for 'Enhancement Requests' with similar permission checkboxes. The 'Session Settings' section follows, featuring a dropdown for 'Session Timeout After' (set to '2 hours of inactivity') and another for 'Session Security Level Required at Login' (set to 'None'). The bottom half of the page is dedicated to 'Password Policies', with various configuration options like password expiration (50 days), complexity requirements (must include alpha and numeric characters), and lockout parameters (lockout after 10 failed logins for 15 minutes).

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Profiles

Custom Object Permissions

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

Session Settings

Session Timeout After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

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

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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	Last Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Adams	adasd	test_dave_1asdasd@salesforce.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	IPM User
<input type="checkbox"/>	Chatter	Chatter	chatty-0059000000sckwz:00vferm00e@chatter.salesforce.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	Elton	elton	amelia.elton.1@00cp000000cpcupaf.hrmboerkeheh.youdonstav@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	GQRN	gqrn	xx0520@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	User Integration	integ	integration000d500000cakeab.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	User Security	sec	integrationsecurity@00cp000000cpcupaf.hrmboerkeheh.youdonstav@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Security User

Salesforce Developer Session - artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005%2Fe%3fretURL%3D%252F005%253FitUserEntityOv... | Finish update

Setup Home Object Manager

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

ADMINISTRATION

Users

- Permission Set Groups
- Permission Sets
- Profiles
- Public Groups
- Queues
- Roles

User Management Settings

Users

- Data
- Email

PLATFORM TOOLS

Apps

Customize Your Home

SETUP Users

New User

User Edit Save Save & New Cancel

General Information

First Name	sowmya
Last Name	bala
Alias	sobala
Email	2k20cse179@kot.ac.in
Username	2k21me16771292564528
Nickname	User169616771292564528
Title	worker
Company	kot bharat
Department	
Division	

Role <None Specified>

User License Salesforce Integration

Profile Salesforce API Only System Integrations

Active

Marketing User

Office User

Knowledge User

File 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

Salesforce Developer Session - artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005%2Fe%3fretURL%3D%252F005%253FitUserEntityOv... | Finish update

Setup Home Object Manager

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

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Username	2k21me16771292564528
Nickname	User169616771292564528
Title	worker
Company	kot bharat
Department	
Division	

Role <None Specified>

User License Salesforce Platform

Profile Manager

Active

Marketing User

Office User

Knowledge User

File 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

The screenshot displays two browser windows side-by-side.

Top Window (Salesforce Setup):

- URL:** artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005j00000A4UoC%3FnoRedirect%3D1%26isUserEntityO...
- Page:** Users - SETUP
- User Details:** Name: sowmya bala, Alias: sthak, Email: 2k21@klot.ac.in, Nickname: User1696167712226-02616, Title: WORKER, Company: klot bank, Department: Division, Address: , Time Zone: (GMT+01:30) India Standard Time (Asia/Kolkata), Locale: English (India), Language: English, Delegated Approver: Manager, Receive Approval Request Emails: Only if I am an approver, Federation ID: App Registration: One-Time Password Authentication, App Registration: Salesforce Authentication.
- Role:** User License: Salesforce Platform Profile: Manager, Active: checked, Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Mobile Push Registrations: 0/250, Data.com User Type: , Accessibility Mode (Classic Only): , Deleting Mode: , High-Contrast Pallete on Charts: , Load Lightning Pages While Scrolling: checked, Salesforce CRM Content User: checked.

Bottom Window (Gmail):

- URL:** mail.google.com/mail/u/0/#inbox?MflngGtSbIsqKRLzCQHbDnRQxWf
- Inbox:** 5,318 messages.
- Message Preview:** From: support@salesforce.com (support@salesforce.com) To: me. Subject: Welcome to Salesforce! Click below to verify your account. Verify Account. To easily log in later, save this URL: https://artificialintelligence-d-dev-ed.lightning.force.com/. Username: 2k21@klot.ac.in Again, welcome to 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

saloni

Change Password

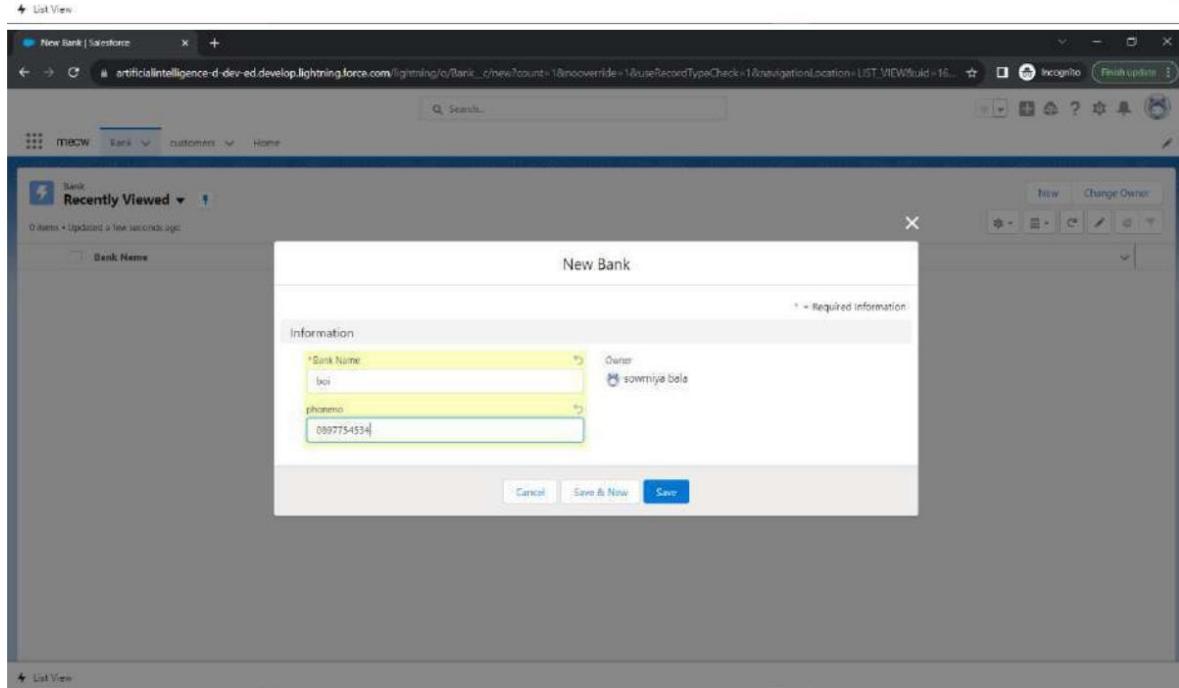
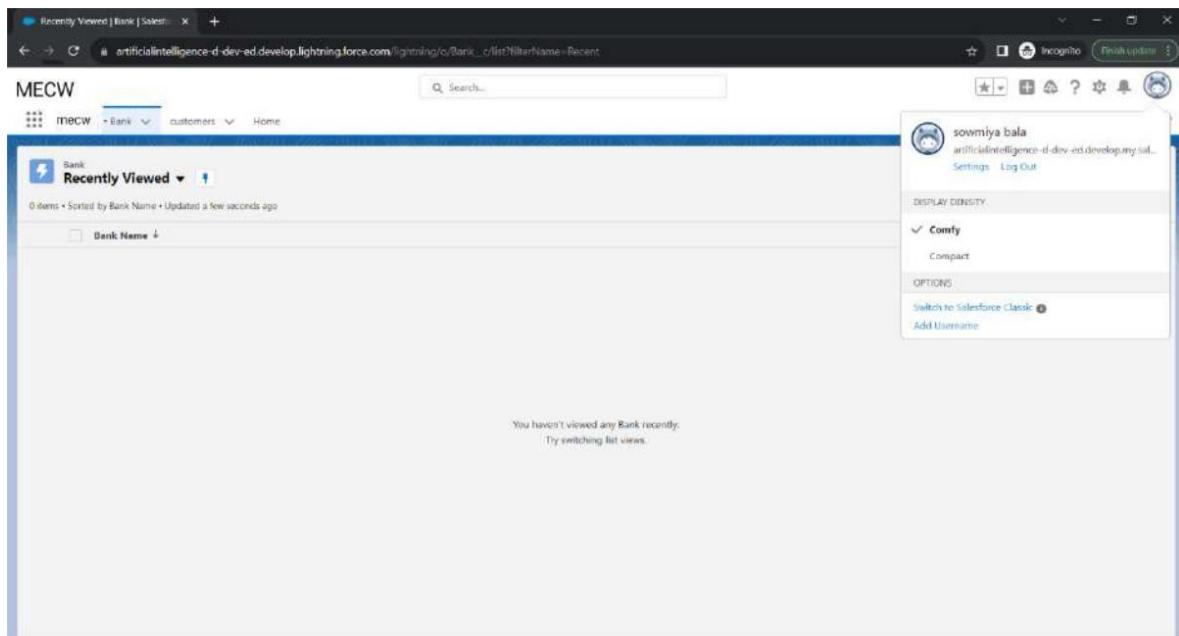
Previous password was last changed on 01/29/2023, 7:22 pm.

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

WATCH ON DEMAND

AIDay

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The image displays two screenshots of the Salesforce Lightning interface, illustrating the creation and viewing of a customer record.

Top Screenshot (New customer):

- The title bar shows "New customer | Salesforce".
- The URL is https://artificialintelligence-d-dev-ed.lightning.force.com/lightning/c/customer__c/new?count=2&nooverride=1&useRecordTypeCheck=1&navigationLocation=LIST_VIEW&listId=005000000V5AAM.
- The page header includes "Recently Viewed" and a search bar.
- The main form is titled "New customer" and contains fields for "customer Name" (set to "madhu") and "Bank" (set to "boi").
- Buttons at the bottom include "Cancel", "Save & New", and "Save".

Bottom Screenshot (Customer Record View):

- The title bar shows "meow | customer | Salesforce".
- The URL is https://artificialintelligence-d-dev-ed.lightning.force.com/lightning/c/customer__c/a025000000V5AAM/view.
- The page header includes "MECW" and a search bar.
- The main area shows a customer record for "madhu" with the following details:
 - Related:** Shows the "customer" relationship.
 - Details:** Shows "customer Name: madhu" and "Bank: boi".
 - Created By:** soumya bala, 01/10/2023, 7:17 pm
 - Last Modified By:** soumya bala, 01/10/2023, 7:17 pm
- A green banner at the top right indicates "customer madhu was created."
- Buttons at the top right include "New Contact", "Edit", and "Delete".

Salesforce Developer Session 2 | Dailymotion Top Hits 2023 | New Page | Profiles | Salesforce | Welcome to Salesforce Verify | Refresh update

Setup Home Object Manager Search Setup

Profiles

All Profiles | Edit | Delete | Create New View

Action	Profile Name	User License	Custos
<input type="checkbox"/>	API Only System Integrations	Salesforce Integration	
<input type="checkbox"/>	Administrator	Salesforce	
<input type="checkbox"/>	Basic Platform User	Silver Partner	
<input type="checkbox"/>	Blank Profile	Salesforce	
<input type="checkbox"/>	Standard Platform User	Salesforce Platform	
<input type="checkbox"/>	Standard User	Salesforce	
<input type="checkbox"/>	System Administrator	Salesforce	

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

1 of 2 Selected 41.4 minutes since last refresh Page 1 of 1

Profile Name: salesmanaged

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

Save Cancel

Salesforce Developer Session 2 | Dailymotion Top Hits 2023 | New Page | Profiles | Salesforce | Welcome to Salesforce Verify | Refresh update

Setup Home Object Manager Search Setup

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: salesmanaged

Save Cancel

Salesforce Developer Session 2 | Profiles | Salesforce | Welcome to Salesforce Verify | +

Setup Home Object Manager Search Setup

Profiles

Profile: salesmanage

Help for this Page

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

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

Layouts [Edit] Enabled Record Access [] Enabled Visualforce Page Access [] Enabled External Data Source Access [] Enabled Shared Credential Access [] Enabled Enhanced Credential Principal Access [] Enabled Enhanced Credential Principal Access [] Enabled Custom Metadata Type Access [] Enabled Custom Setting Definitions Access [] Enabled File Access [] Enabled SObject Progress Status Access [] Enabled Custom Permissions []

Profile Detail

Name: salesmanage	User License: Salesforce Platform	Custom Profile: <input checked="" type="checkbox"/>
Description:	Created By: QOBAL S. 01/10/2020, 7:10 pm	Modified By: QOBAL S. 01/10/2020, 7:10 pm

Page Layouts

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

Salesforce Developer Session 2 | Profiles | Salesforce | Welcome to Salesforce Verify | +

Setup Home Object Manager Search Setup

Profiles

Profile Edit

Profile Title: salesmanage

Save Save & New Cancel

Name: salesmanage

User License: Salesforce Platform

Description:

Custom Profile:

Custom App Settings

Module	Visible	Default
Analytics Studio (standard_Analytics)	<input type="checkbox"/>	<input checked="" type="radio"/>
App Launcher (standard_AppLauncher)	<input type="checkbox"/>	<input checked="" type="radio"/>
Horizon	<input checked="" type="checkbox"/>	<input type="radio"/>

Service Provider Access

Module	Visible	Default
Platform (standard_Platform)	<input checked="" type="checkbox"/>	<input type="radio"/>
WDC (standard_WDC)	<input type="checkbox"/>	<input checked="" type="radio"/>

Tab Settings

Override user's personal tab customizations:

Standard Tab Settings

Tab	Name	Default On
Accounts	Account	<input checked="" type="checkbox"/>
Leads	Lead	<input type="checkbox"/>

Salesforce Developer Session 2 | Profiles | Salesforce | Welcome to Salesforce Verify... | +

Setup Home Object Manager Search Setup

Profiles

Limited Post-Emails User Internet Unrestricted

Custom Object Permissions

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

Enhancement Requests

Session Settings

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

Password Policies

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

Salesforce Developer Session 2 | Profiles | Salesforce | Welcome to Salesforce Verify... | +

Setup Home Object Manager Search Setup

Profiles

Limited Post-Emails User Internet Unrestricted

Custom Object Permissions

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

Enhancement Requests

Session Settings

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

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

Save Save & New Cancel

Salesforce Developer Session 2 | DZone Top Hits 2022 | New Project | Users | Salesforce | Welcome to Salesforce Verify | +

Setup Home Object Manager

Q user

v **Users**

- Permission Set Groups
- Permission Sets
- Profiles
- Public Groups
- Queues
- Roles
- User Management Settings
- Users**
- Feature Settings
- Datacom
- Prospector Users
- Service
- Embedded Service
- Messaging for In-App and Web User Verification
- User Interface
- Action Link Templates
- Actions & Recommendations
- App Menu

Search Setup

Users

New User

User Edit Save Save & New Cancel

General Information

First Name	madhu
Last Name	b
Alias	mb
Email	2k20cae179@kitec.in
Username	2k20cae179@kot.ac.in
Nickname	User18961684240654192
Title	worker
Company	kot bark
Department	Sales
Division	

Role <None Specified> User License Salesforce Integration Profile Salesforce API Only System Integrations Active Marketing User Office User Knowledge User File User Service Cloud User Site.com Contributor User Site.com Publisher User WDC User Datacom User Type -None- Datacom Monthly Addition Limit (Default Limit 1000) Accessibility Mode (Classic Only) High Contrast Palette on Charts Load Lightning Pages While Scrolling Debug Mode

Help for this Page

Salesforce Developer Session 2 | DZone Top Hits 2022 | New Project | Users | Salesforce | Welcome to Salesforce Verify | +

Setup Home Object Manager

Q user

v **Users**

- Permission Set Groups
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- Service
- Embedded Service
- Messaging for In-App and Web User Verification
- User Interface
- Action Link Templates
- Actions & Recommendations
- App Menu

Search Setup

Users

New User

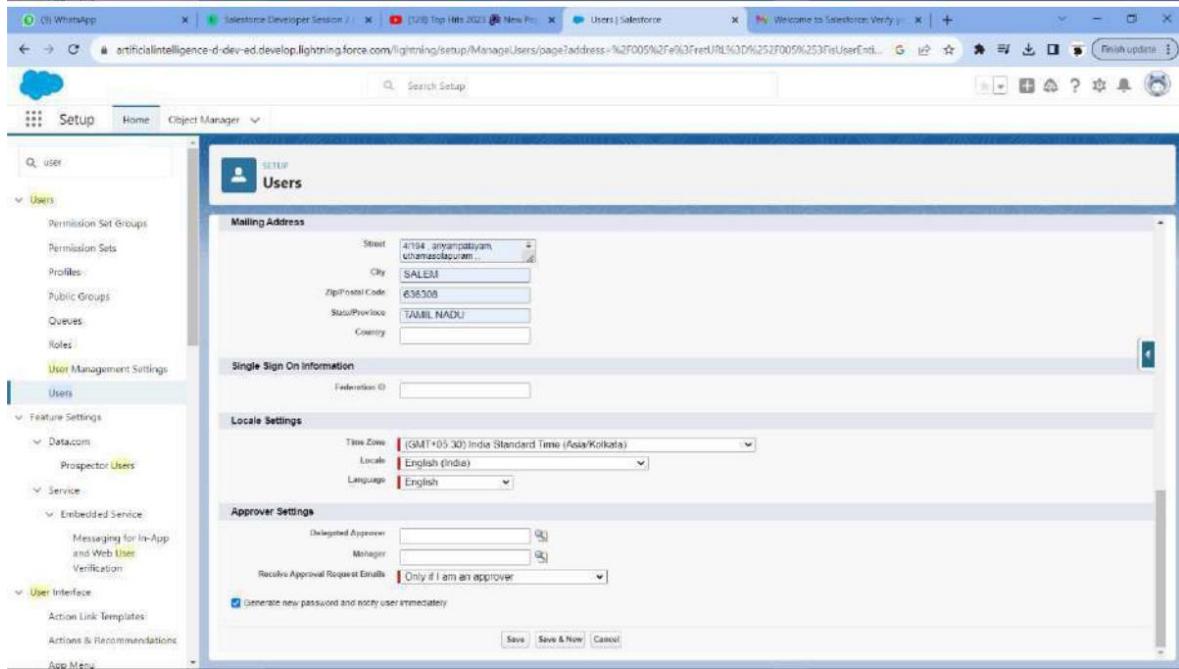
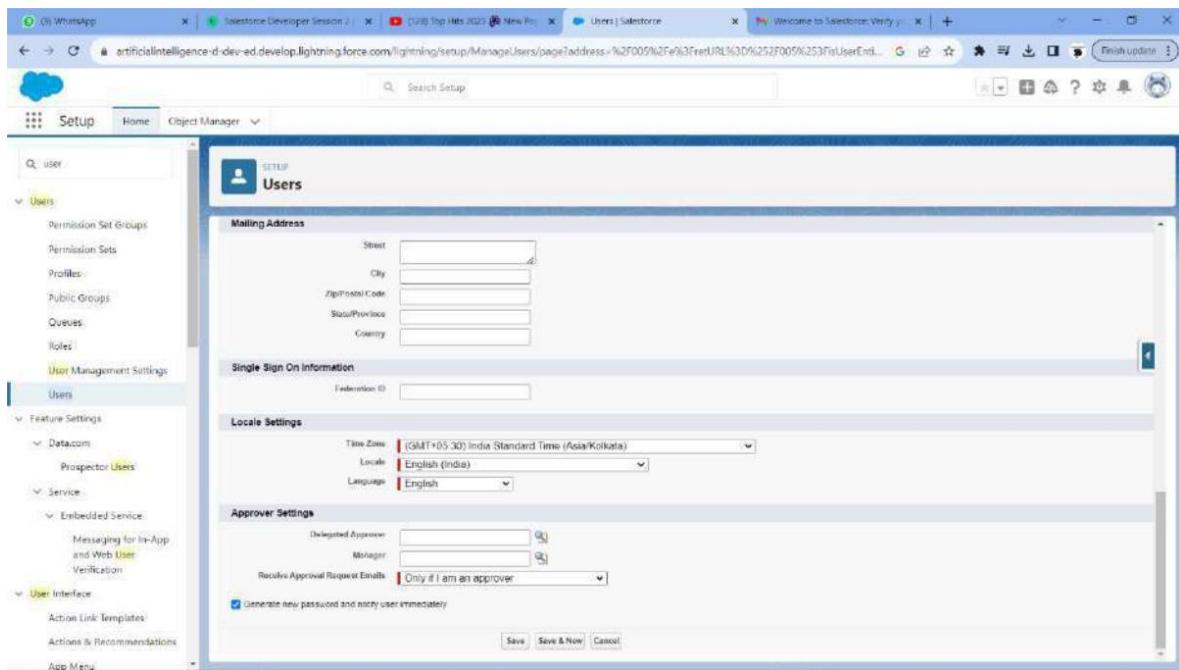
User Edit Save Save & New Cancel

General Information

First Name	madhu
Last Name	b
Alias	mb
Email	2k20cae179@kitec.in
Username	2k20cae179@kot.ac.in
Nickname	User18961684240654192
Title	worker
Company	kot bark
Department	Sales
Division	

Role <None Specified> User License Salesforce Platform Profile salesmanager Active Marketing User Office User Knowledge User File User Service Cloud User Site.com Contributor User Site.com Publisher User WDC User Datacom User Type -None- Datacom Monthly Addition Limit (Default Limit 1000) Accessibility Mode (Classic Only) High Contrast Palette on Charts Load Lightning Pages While Scrolling Debug Mode

Help for this Page



The image displays two side-by-side browser windows. The left window shows the Salesforce Setup interface under the 'Users' section, specifically the 'User Detail' view for a user named 'madhu b'. The right window shows a Gmail inbox with a prominent 'Welcome to Salesforce!' message from Salesforce.

Salesforce Setup - User Detail:

- User:** madhu b
- Name:** madhu b
- Email:** 2k20sci175@kiit.ac.in
- Domain:** 2k20sci175@kiit.ac.in
- Nickname:** User16961684242005-11200
- Title:** WORKER
- Company:** kkt bank
- Department:** Sales
- Division:** Address: Utkal, Enamalapuram, Utkalapuram, Paraiyakudi, Salem- 636008
TAMIL NADU
(GMT +03) India Standard Time (Asia/Kolkata)
- Time Zone:** English (India)
- Language:** English
- Delegated Approver:** Manager: Only if item is approved
- Federation ID:** [redacted]
- App Registrations:** One-Time Password Authentication
- Role:** Marketing User, Office User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Salesforce Platform Profile
- Status:** Active
- Mobile Push Registrations:** View
- Accessibility Mode (Classic Only):** Debugging Mode, High-Contrast Palettes on Charts, Load Lightning Pages While Scripting

Gmail Inbox - Welcome to Salesforce!

The email subject is 'Welcome to Salesforce!' and the body contains:

Welcome to Salesforce!

Click below to verify your account.

[Verify Account](https://artificialintelligence-d-dev-ed-developer.my.salesforce.com)

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

Username:
2k20sci175@kiit.ac.in

Again, welcome to Salesforce!

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Salesforce.com, Inc. The Landmark at One Market, Suite 300, San Francisco, CA 94103, United States

Change Your Password | Salesforce

artificialintelligence-d-dev-ed-develop.my.salesforce.com/_ui/system/security/ChangePassword!retJfl_vh%2fhome%2fhome.jsp&fromFrontdoor=1&setupid=ChangePa... Incognito Fresh update



Change Your Password

Enter a new password for 2k20csit@kiotac.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 01/30/2023, 7:24 pm.

Recently Viewed | Bank | Salesforce

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

MECW

meow Bank customers Home

Bank Recently Viewed

0 items • Updated a few seconds ago

Bank Name

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

New

List View

Recently Viewed | customers | +

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

MECW

meow Bank customers Home

Search...

customer Name

Recently Viewed

0 items • Updated a few seconds ago

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

List View

0 WhistleApp 1 Salesforce Developer Studio 2 Top Hits 2023 3 Fresh update

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

Search Setup

Setup Home Object Manager

Q user

Permission Sets

Permission Sets

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

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

All Permission Sets [Edit](#) [Create new View](#)

Action	Permission Set Label	Description	Users
<input type="checkbox"/>	Access to catalog	Allows access to the store. Lets users see products and categories... Includes all Buyer capabilities, and allows access to manage carts an...	B2B Buyer Permission Set One Seat
<input type="checkbox"/>	Buyer	Includes all Buyer capabilities, and allows access to manage carts an...	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/>	Buyer Manager	Denotes that the user is a sales cloud or service cloud user.	CRM User
<input type="checkbox"/>	Commerce Admin	Allows access to commerce admin features.	Commerce Admin Permission Set License Seat
<input type="checkbox"/>	Contact Center Admin	Manage Service Cloud Voice contact centers that use Amazon Connect.	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Agent	Access agent features in Service Cloud Voice contact centers th...	Service Cloud Voice User
<input type="checkbox"/>	Contract Agent	Access supervisor features in Service Cloud Voice contact centers th...	Service Cloud Voice User
<input type="checkbox"/>	Customer Profile Manager	Allows users create, read, edit, and delete customer, subscriptions, email...	Salesforce
<input type="checkbox"/>	Facility Manager	Give your mobile workers access to the Field Service mobile app. S...	Field Service Mobile
<input type="checkbox"/>	Field Service Mobile	Allow access to commerce merchandising features.	Commerce Merchandise User Permission Set License Seat
<input type="checkbox"/>	Merchandise	Read Access to all entities enabled by Order Management	Lightning Order Management User
<input type="checkbox"/>	Order Management Agent	Access to all features enabled by Order Management.	Lightning Order Management User
<input type="checkbox"/>	Order Management Operations Manager	Limited access to Order Management features for Draft Service	Lightning Order Management User
<input type="checkbox"/>	Order Management Shippa		

1-20 of 29 [1 Selected](#) [Previous](#) [Next](#) Page 1 of 2

https://artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/c/customer__c/list?filterName=Recent

Step 2:

Permission Sets:

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

Object-Level Security:

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

Record-Level Security:

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

Ownership:

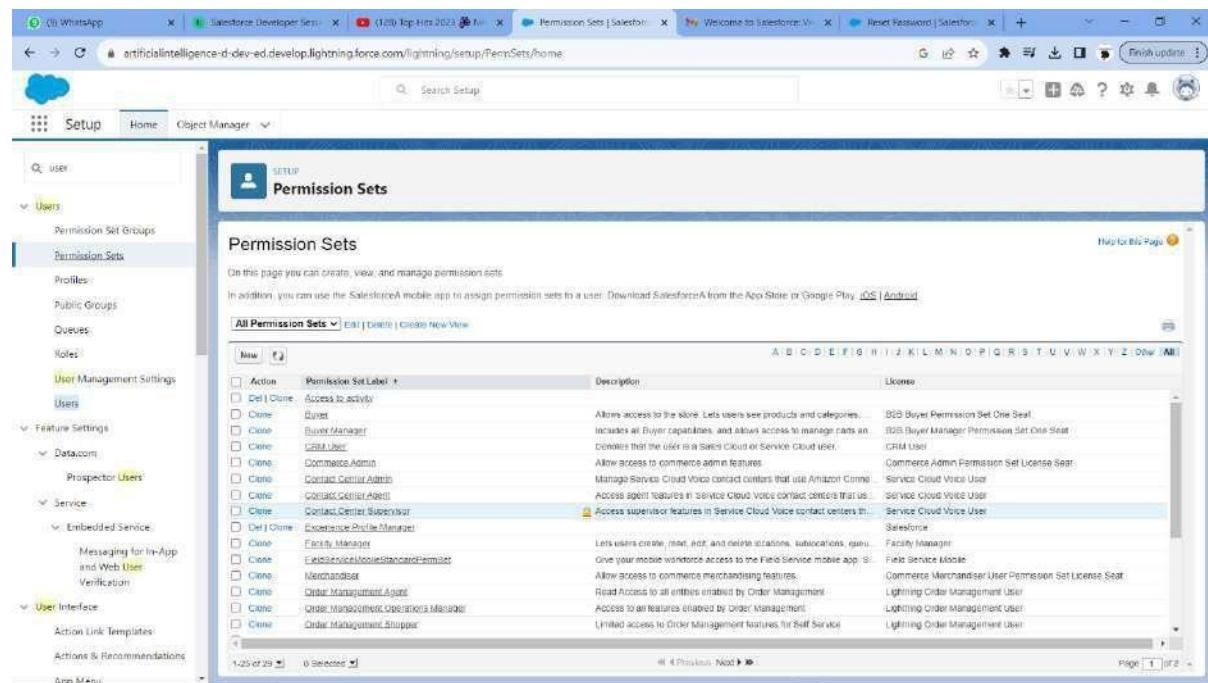
- Ensure that the Account records are owned by the respective users, with User A owning their records and User B owning their records.

Organization-Wide Defaults:

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

Testing:

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



The screenshot shows the Salesforce 'Permission Sets' page. The left sidebar is collapsed, and the main area displays a table of permission sets. The table 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', 'Field Service Mobile', 'Merchandise', 'Order Management Agent', 'Order Management Operations Manager', and 'Order Management Shopper'. Each row includes a checkbox for selecting and deleting the permission set. The 'Description' column provides a brief overview of the permissions granted, and the 'License' column indicates the specific license required for each set.

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-Off
<input type="checkbox"/>	Buyer	Includes all Buyer capabilities, and allows access to manage carts in Service Cloud.	B2B Buyer Manager Permission Set One-Off
<input type="checkbox"/>	Buyer Manager	Denotes that the user is a Sales Cloud or Service Cloud user.	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	Allows access to commerce admin features.	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Admin	Manages Service Cloud Voice contact centers that use Amazon Connect.	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Agent	Access agent features in Service Cloud Voice contact centers that use Amazon Connect.	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Supervisor	Access supervisor features in Service Cloud Voice contact centers that use Amazon Connect.	Service Cloud Voice User
<input type="checkbox"/>	Experience Profile Manager	Lets users create, edit, and delete profiles, subaccounts, and users.	Salesforce
<input type="checkbox"/>	Facility Manager	Give your mobile workforce access to the Field Service mobile app.	Field Service Mobile
<input type="checkbox"/>	Field Service Mobile	Give your mobile workforce access to the Field Service mobile app.	Commerce Merchandise User Permission Set License Seat
<input type="checkbox"/>	Merchandise	Allows access to commerce merchandising features.	Lightning Order Management User
<input type="checkbox"/>	Order Management Agent	Read access to all entities managed 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 Staff Services.	Lightning Order Management User

Salesforce Developer Session

Permission Sets | Salesforce

artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2Fudid%2FPermissionSet%2FnNewPermissionSet.apexp

Setup Home Object Manager

Search Setup

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Datacom

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 Create

Help for this Page

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.

Licenses: -None-

Save Cancel

Salesforce Developer Session

Permission Sets | Salesforce

artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2Fudid%2FPermissionSet%2FnNewPermissionSet.apexp

Setup Home Object Manager

Search Setup

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Datacom

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 Create

Help for this Page

Enter permission set information

Label: salesmanager

API Name: salesmanager

Description:

Session Activation Required:

Select the type of users who will use this permission set

Who will use this permission set?

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

Not sure what a permission set license is? Learn more here.

Licenses: -None-

Save Cancel

Salesforce Developer Session

Permission Sets | Salesforce

Welcome to Salesforce! | Reset Password | Salesforce

Finish update

Setup Home Object Manager

Q Search Setup

User

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

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Actions & Recommendations

App Menu

Permission Set Overview

Description: salesmanager

API Name: salesmanager

Namespace Prefix: salesmanager

Created By: GLOBAL_S_01/10/2023, 7:29 pm

Session Activation Required: No

Last Modified By: GLOBAL_S_01/10/2023, 7:29 pm

Assigned Apps

Assigned Connected Apps

Object Settings

App Permissions

Apex Class Access

Visualforce Page Access

External Data Source Access

File Access

Learn More

Salesforce Developer Session

Permission Sets | Salesforce

Welcome to Salesforce! | Reset Password | Salesforce

Finish update

Setup Home Object Manager

Q Search Setup

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App Menu

Permission Set Overview > Object Settings

Object Settings

Object Name	Object Permissions	Total Fields	Tab Settings
Accounts	No Access	40	—
AI Insights Reasons	No Access	—	—
AI Report Insights	No Access	—	—
Appointment Scheduling Methods	No Access	27	—
API Anomaly Event Stores	No Access	—	—
Analytics Query Requests	No Access	—	—
Application Usage Assessments	No Access	—	—
Appointment Calendars	No Access	0	—
Appointment Instances	No Access	17	—
Appointment Invitations	—	4	—
Appointment Scheduling Analytics	No Access	—	—
Appointment Schedule Logs	No Access	—	—
Appointment Topic Time Slots	No Access	6	—
Asset Actions	No Access	30	—
Asset Action Sources	No Access	18	—
Asset Relationships	—	10	—
Assets	No Access	42	—
Asset State Periods	No Access	11	—

Salesforce Developer Setup

Permission Sets | Salesforce

https://artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2F0P5900000Ph0l%3Fs%3DEntityPermissions%26o%3D...

Setup Home Object Manager

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https://artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2F0P5900000Ph0l%3Fs%3DEntityPermissions%26o%3D...

Setup Home Object Manager

Q Search Setup

SETUP

Permission Sets

Permission Set salesmanager

Find Settings Close Delete Edit Properties Manage Assignments

Permission Set Overview > Object Settings Bank

Bank

Edit

Tab Settings

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

Object Permissions

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

Field Permissions

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

Video Tutorial Help for This Page

Salesforce Developer Setup

Permission Sets | Salesforce

https://artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2F0P5900000Ph0l%3Fs%3DEntityPermissions%26o%3D...

Setup Home Object Manager

Q user

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https://artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2F0P5900000Ph0l%3Fs%3DEntityPermissions%26o%3D...

Setup Home Object Manager

Q Search Setup

SETUP

Permission Sets

Permission Set salesmanager

Find Settings Close Delete Edit Properties Manage Assignments

Permission Set Overview > Object Settings Bank

Bank

Save Cancel

Tab Settings

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

Object Permissions

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

Field Permissions

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

Video Tutorial Help for This Page

Salesforce Developer Setup

Permission Sets | Salesforce

Welcome to Salesforce

Reset Password | Salesforce

Finish update

Setup Home Object Manager

Search Setup

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User Interface

Action Link Templates

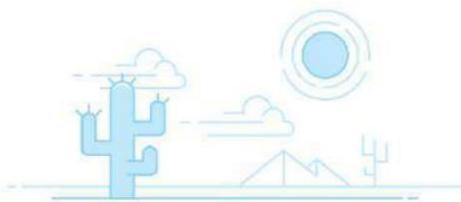
Actions & Recommendations

App Menu

salesmanager

Current Assignments

No assignments defined.



Salesforce Developer Setup

Permission Sets | Salesforce

Welcome to Salesforce

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Finish update

Setup Home Object Manager

Search Setup

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Action Link Templates

Actions & Recommendations

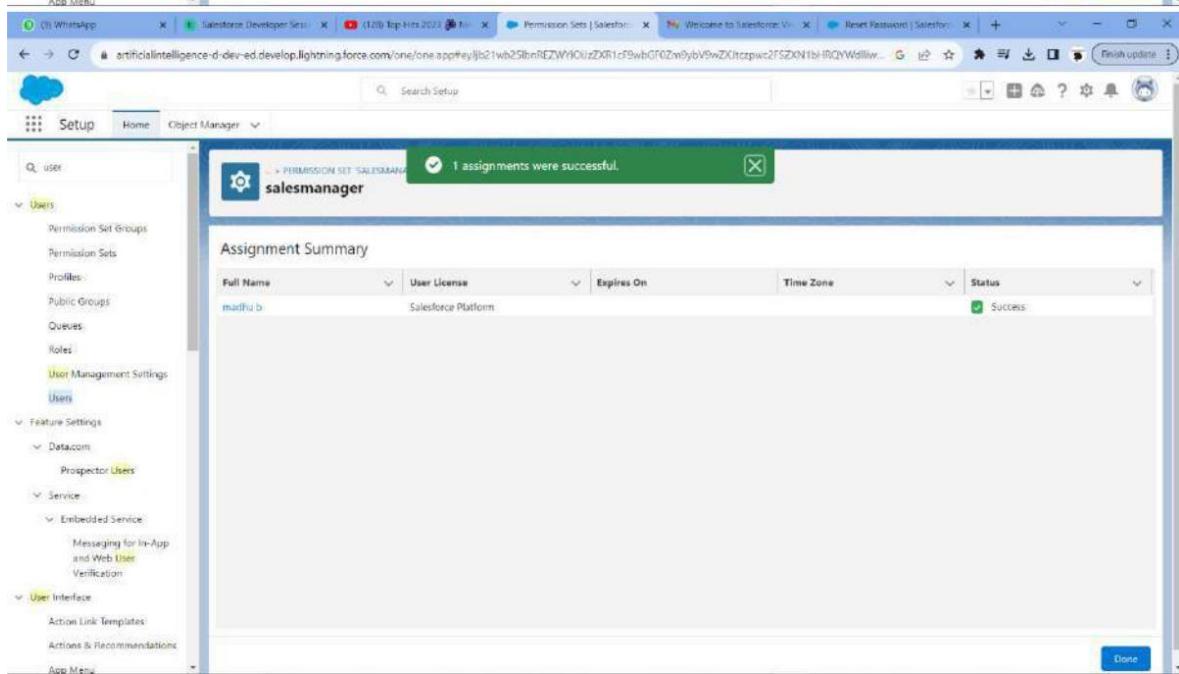
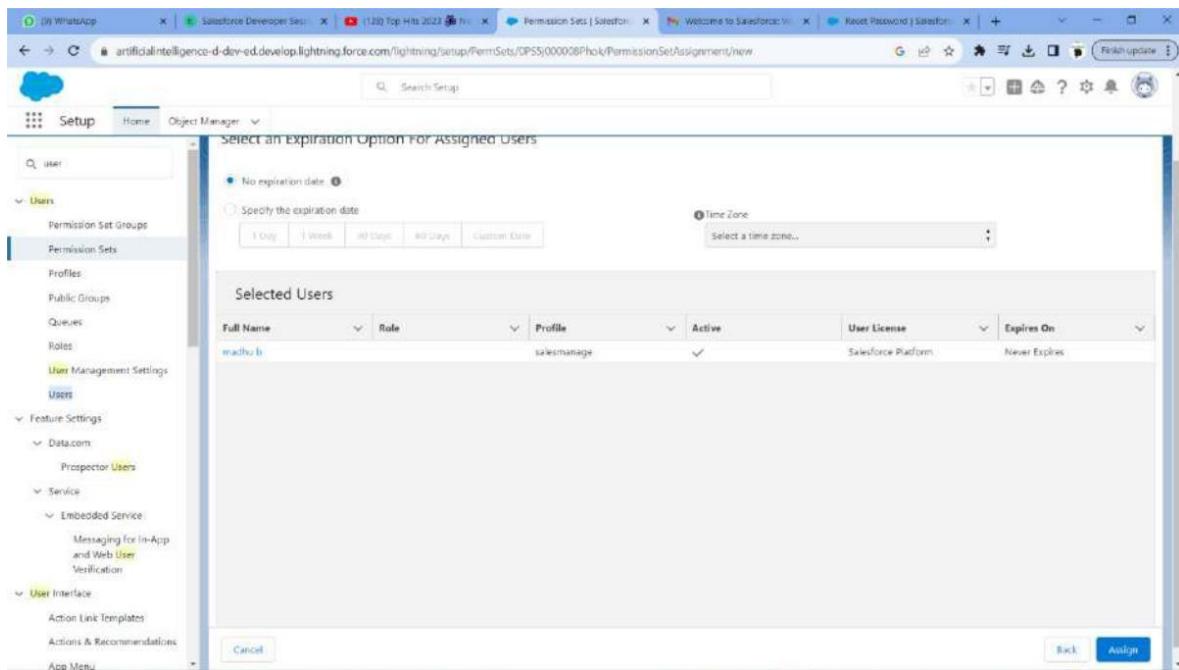
App Menu

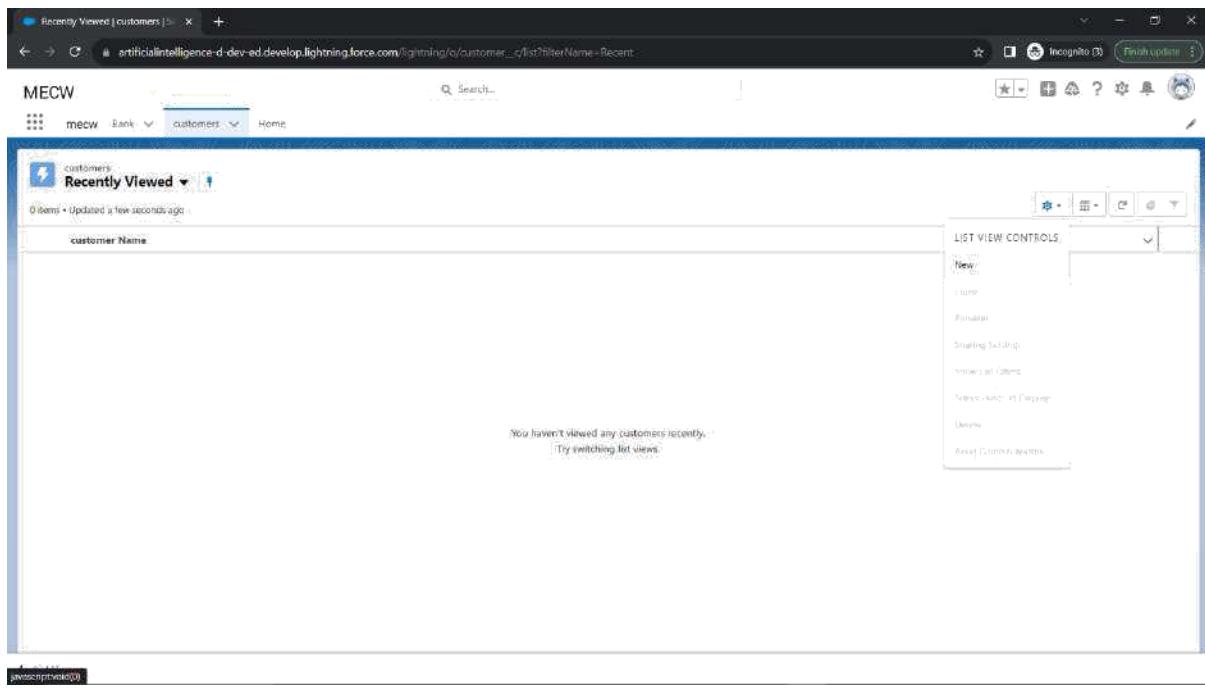
All Users

1 item selected

Full Name	Role	Ac...	Profile
Amelia Ellington	Chatter Expert	Chatter	Force.com - App Subscription User
Chatter Expert	Chatter	Chatter	Chatter Free User
Diya Adarna	Integration User	Integration	UMS User
GOPAL S	Integ	Integration	System Administrator
Integration User	Integ	Integration	Analytics Cloud Integration User
madhub	mb	mb2000@idat.ac.in	salemanager
Security User	sec	insightssecurity@000500000beskeah.com	Analytics Cloud Security User
sevamyl bale	abala	2k21@kirt.ac.in	Manager

C Cancel Next



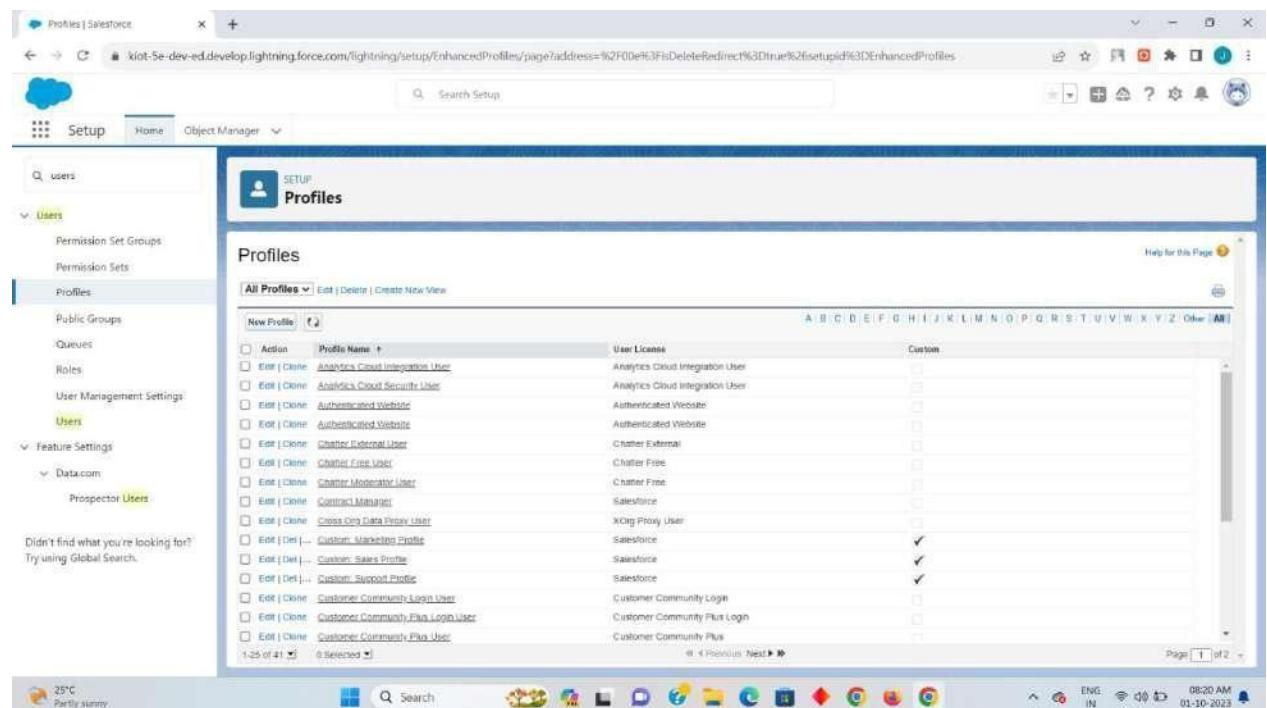


3. . Suppose there are 2 Users and they are having Create, Read, Edit access on Account Object with the same profile but we want to open up the access for one user to delete how will you implement the Security setting.

Solution:

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

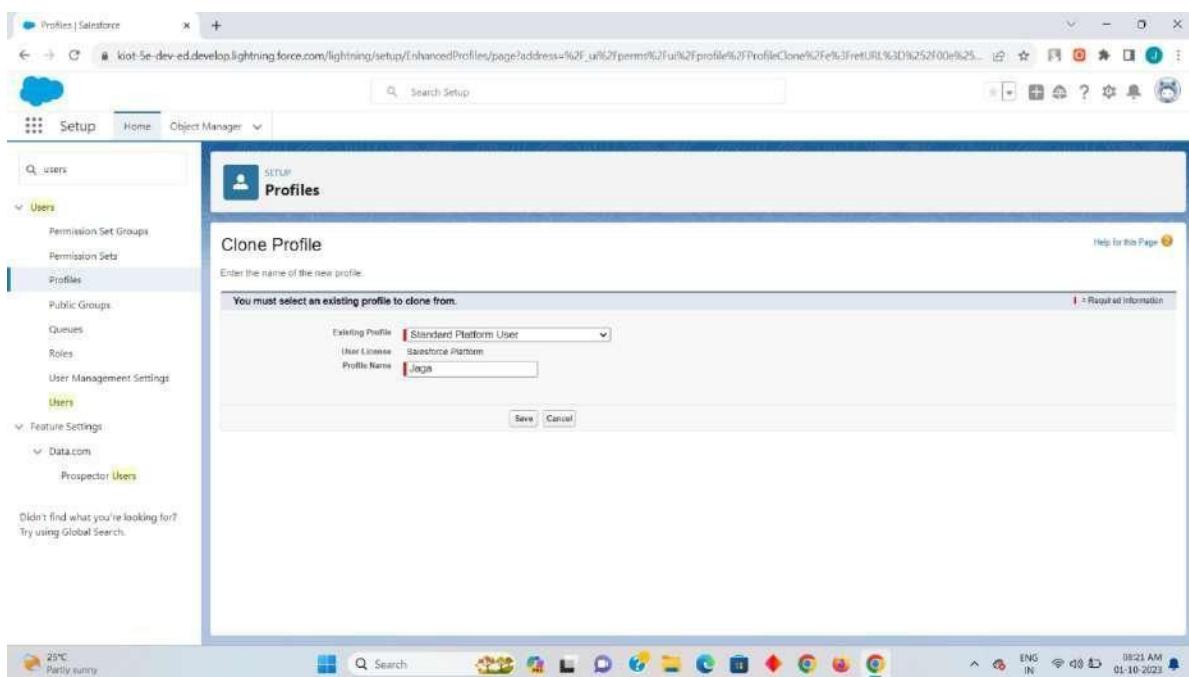
Setup-quick search[profile]



The screenshot shows the Salesforce Setup interface for managing profiles. The left sidebar navigation includes 'Setup', 'Home', and 'Object Manager'. Under 'Users', 'Profiles' is selected. The main content area displays a table titled 'Profiles' with columns for 'Action', 'Profile Name', 'User License', and 'Custom'. The table lists various profiles such as 'Analytics Cloud Integration User', 'Analytics Cloud Security User', 'Authenticated Website', 'Chatter External', 'Chatter Free', 'Contract Manager', 'Salesforce', 'XOrg Proxy User', 'Customer Community Login User', 'Customer Community Plus Login', and 'Customer Community Plus User'. A note at the bottom indicates '1-25 of 41' profiles found. The bottom of the screen shows the Windows taskbar with icons for search, file explorer, and various applications.

Step 2:

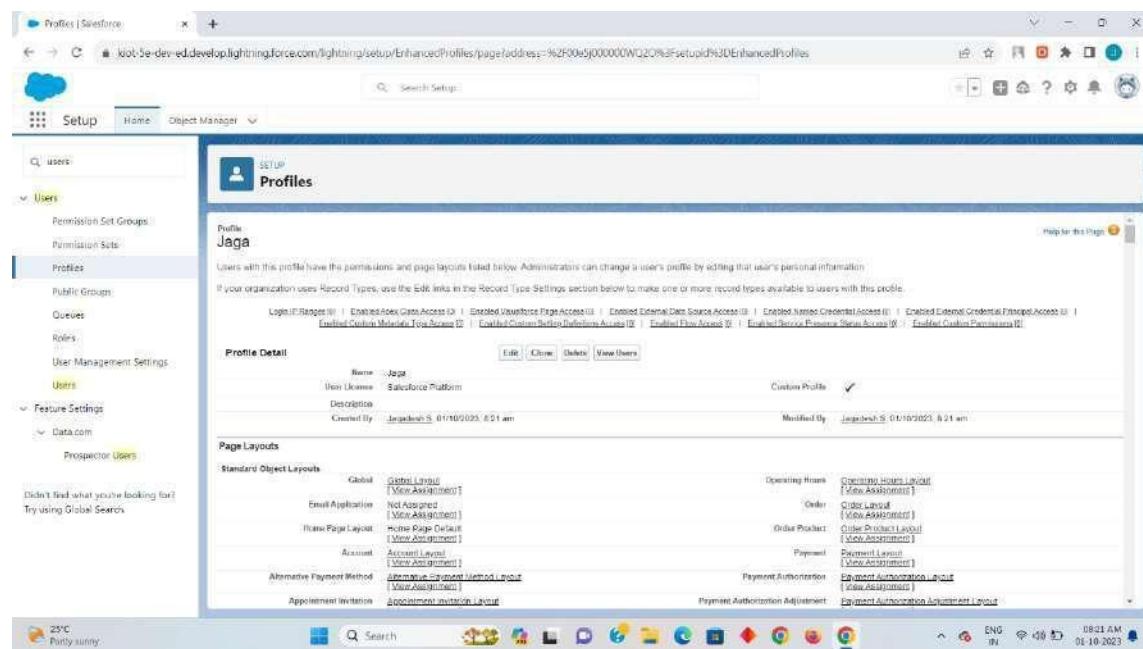
Click on the new to create a new profile along with the label and Api



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

Step 3:

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



Profiles | Salesforce

Setup Home Object Manager

Q users

Users

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

Users

- Feature Settings
- Data.com
- Prospector Users

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SETUP Profiles

Profiles

	Communication Subscription Contracts	Communication Subscription Timings	Contacts	Contact Point Addresses	Contact Point Contracts	Contact Point Emails	Locations	Party Contracts	Push Topics	Sellers	Streaming Channels	User External Credentials
Communication Subscription Contracts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Communication Subscription Timings	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Contacts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Contact Point Addresses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Contact Point Contracts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Contact Point Emails	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

Custom Object Permissions

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

Session Settings

Session Times Out After: 2 hours of inactivity

Enable different Experience Cloud login policies for employees:

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

Session Security Level Required at Login: None

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Search

ENG IN 40 08:21 AM 01-10-2023

Profiles | Salesforce

Setup Home Object Manager

Q users

Users

- Permission Set Groups
- Permission Sets
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SETUP Profiles

Profiles

	Communication Subscription Contracts	Communication Subscription Timings	Contacts	Contact Point Addresses	Contact Point Contracts	Contact Point Emails	Locations	Party Contracts	Push Topics	Sellers	Streaming Channels	User External Credentials
Communication Subscription Contracts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Communication Subscription Timings	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Contacts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Contact Point Addresses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Contact Point Contracts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Contact Point Emails	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

Custom Object Permissions

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

Session Settings

Session Times Out After: 2 hours of inactivity

Enable different Experience Cloud login policies for employees:

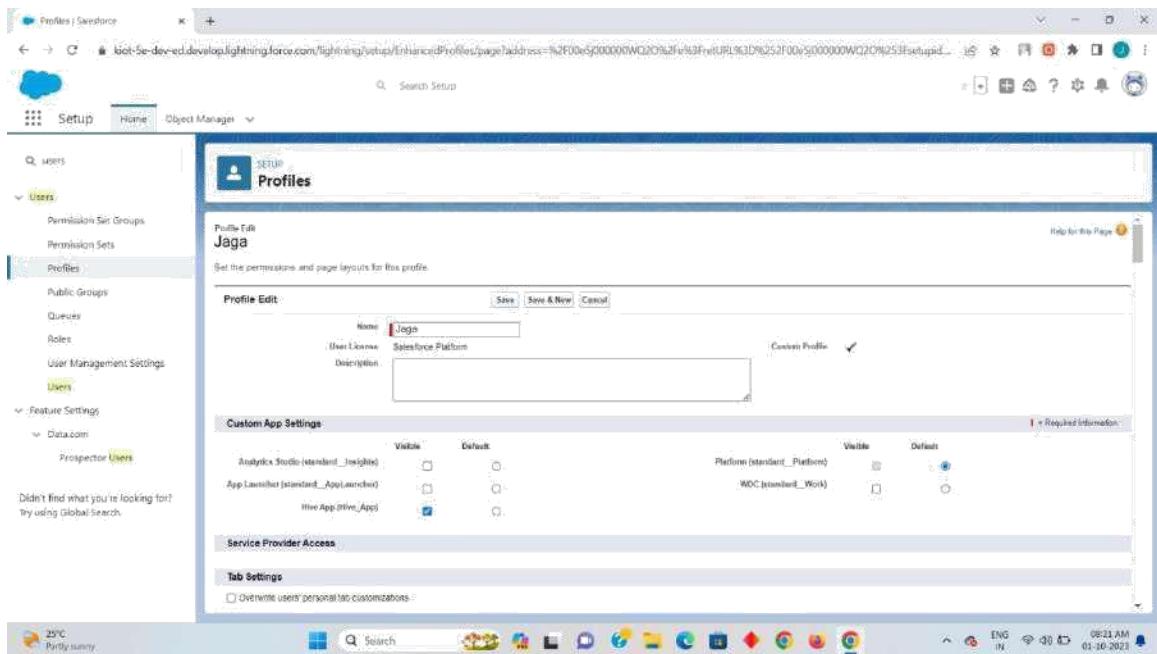
- Separate Experience Cloud site and Salesforce login authentication for employees.
- Role login IP restrictions
- Skip employee device activation during Experience Cloud site login

Session Security Level Required at Login: None

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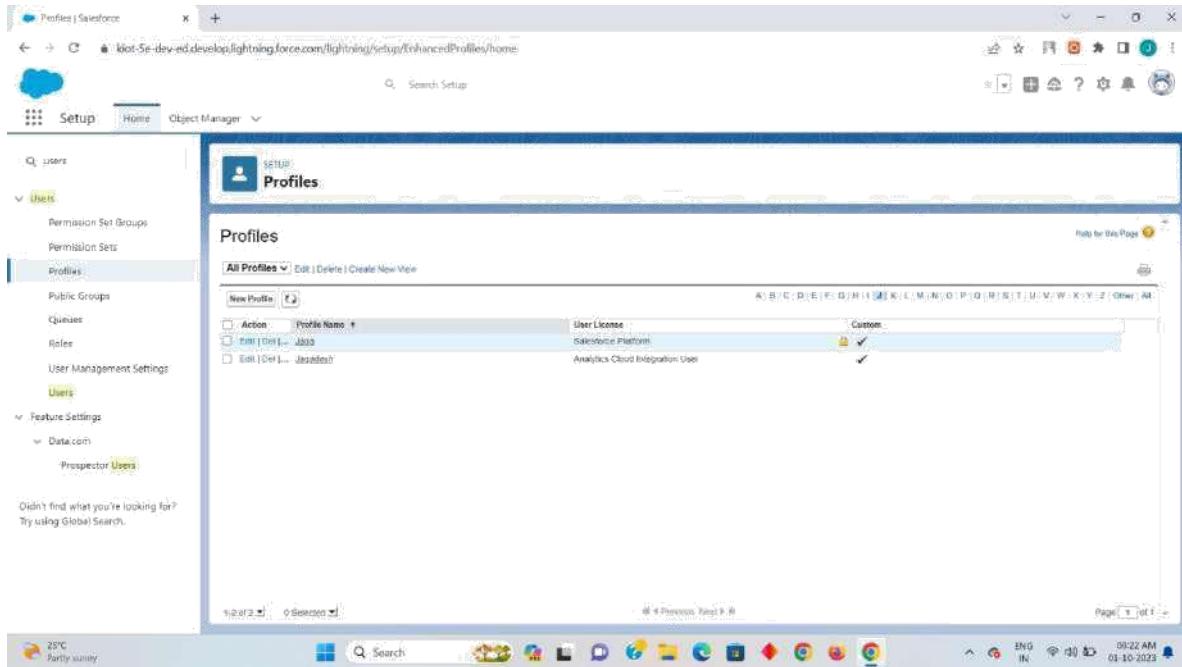
Search

ENG IN 40 08:21 AM 01-10-2023



Step 4

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



Step 5:

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

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

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Chatter_Excel	Chatter	chatty_005@0000000000000000000000000000000@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	Grey_Jaga	grey	jagc_grey@lightningmail.cz7d2kopt3@gmail.com		<input checked="" type="checkbox"/>	Customer Community User
<input type="checkbox"/>	S_Jaga	js	jagc_js@gmail.com	CEO	<input type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	S_Jagadev	js	jagc1117@gmail.com	SP Admin	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	S_Jagadev	js	jagc1117@gmail.com	Channel Sales Team	<input type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	User_Integration	integ	integration00049@0000000000000000000000000000000@ceef2.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	User_Security	sec	usersecurity@00a5000000000000@ceef2.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

Salesforce

Setup Home Object Manager

Q Users

Users

Provision Set Groups
Permission Sets
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Data.com
Prospector Users

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

New User

User Edit Save Save & New Cancel

General Information

First Name	Jagadeesh11
Last Name	S
Alias	RS
Email	new123@gmail.com
Username	jag123@gmail.com
Nickname	User109612075144962992
Title	
Company	
Department	
Division	

Role: Director - Channel Sales
User License: Salesforce Platform
Profile: Manager - None
Active: None
Marketing User: Standard Platform User
Office User:
Knowledge User:
Flow User:
Service Cloud User:
Salesforce Contributor User:
E-commerce Publisher User:
WDC User:
Data.com User Type: Admin
Data.com Monthly Address Limit: Default Limit (200)
Accessibility Mode (Classic Only): ENG IN 08:31 AM 01-10-2023

Help for this page

Salesforce

Setup Home Object Manager

Q Users

Users

Provision Set Groups
Permission Sets
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Quotas
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Didn't find what you're looking for? Try using Global Search.

New User

User Edit Save Save & New Cancel

General Information

First Name	Jagadeesh12
Last Name	S
Alias	RS
Email	new123@gmail.com
Username	jag123@gmail.com
Nickname	User109612075144962993
Title	
Company	
Department	
Division	

Role: Marketing Team
User License: Salesforce Platform
Profile: Manager - None
Active: Jag
Marketing User: Standard Platform User
Office User:
Knowledge User:
Flow User:
Service Cloud User:
Salesforce Contributor User:
E-commerce Publisher User:
WDC User:
Data.com User Type: Admin
Data.com Monthly Address Limit: Default Limit (200)
Accessibility Mode (Classic Only): ENG IN 08:31 AM 01-10-2023

Help for this page

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Setup Home Object Manager

Q Users

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

All Users

On this page you can view, create, and manage users. In addition, download Salesforce1 to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices. (S) Added

View: All Users Add Create New User

Actions	First Name	Last Name	Username	Role	Active	Profile
<input type="checkbox"/>	RS	S	rs123@gmail.com	CEO	<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	RS	S	rs123@gmail.com	SP Admin	<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	RS	S	rs123@gmail.com	Channel Sales Team	<input checked="" type="checkbox"/>	Standard Platform User
<input checked="" type="checkbox"/>	RS	S	rs123@gmail.com	Director - Channel Sales	<input checked="" type="checkbox"/>	Standard Platform User
<input checked="" type="checkbox"/>	RS	S	rs123@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Standard Platform User

New User Reset Password(s) Add Multiple Users

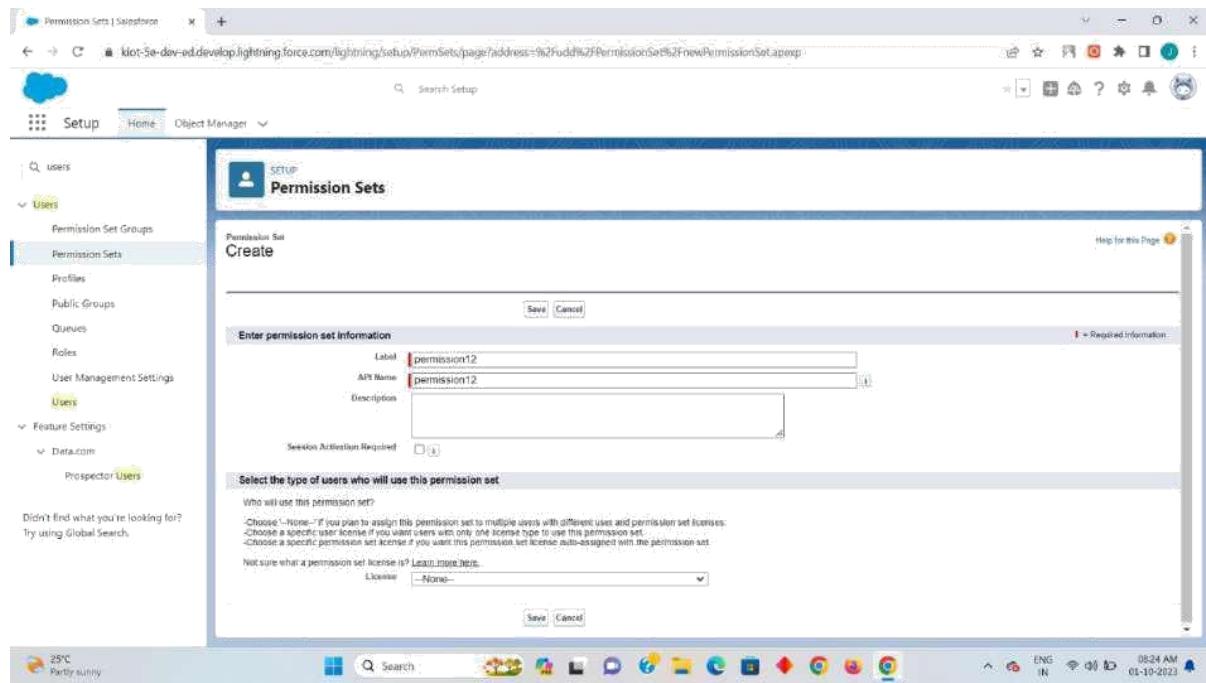
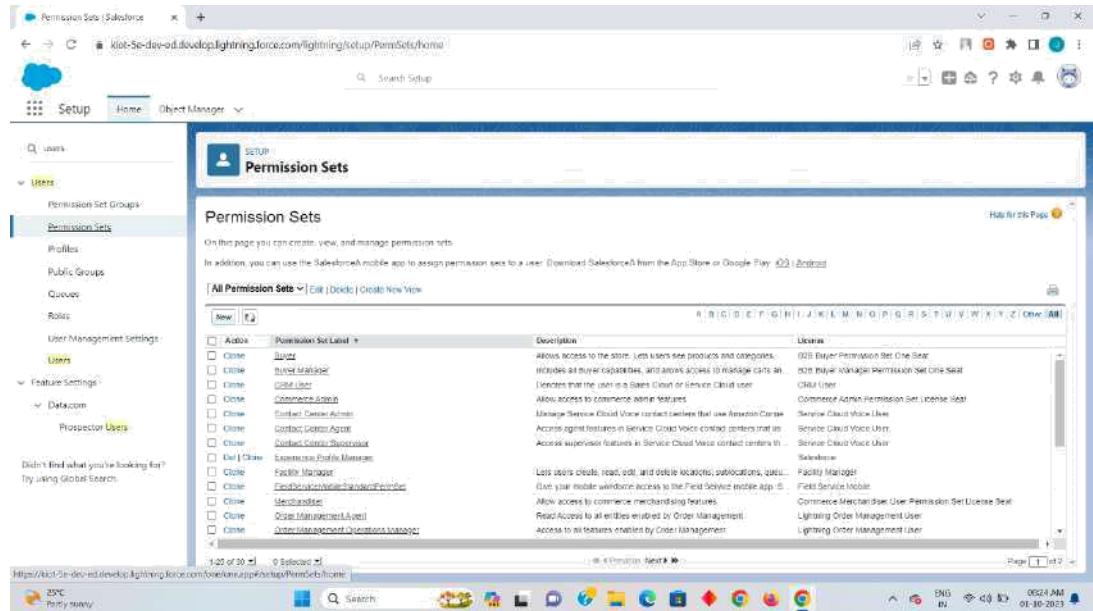
A B C D E F G H I J K L M N O P Q R S T U V W X Y Z User

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

Step 6:

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

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



Permission Sets | Salesforce

Setup Home Object Manager

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Permission Set Groups

Permission Sets

Profiles

Public Groups

Quotas

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User Management Settings

Users

Feature Settings

Data.com

Prospector Users

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

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Search Setup

Permission Set Overview

permission12

Description: License: Session Activation Required: Last Modified By: API Name: permission12 Namespace Prefix: Created By: Last Modified On: 01/10/2023 8:24 am

Assigned Apps

Assigned Connected Apps

Object Settings

App Permissions

Apex Class Access

Visualforce Page Access

External Data Source Access

API Version: 100.0

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Permission Sets | Salesforce

Setup Home Object Manager

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Quotas

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User Management Settings

Users

Feature Settings

Data.com

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

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Search Setup

Permission Set Overview

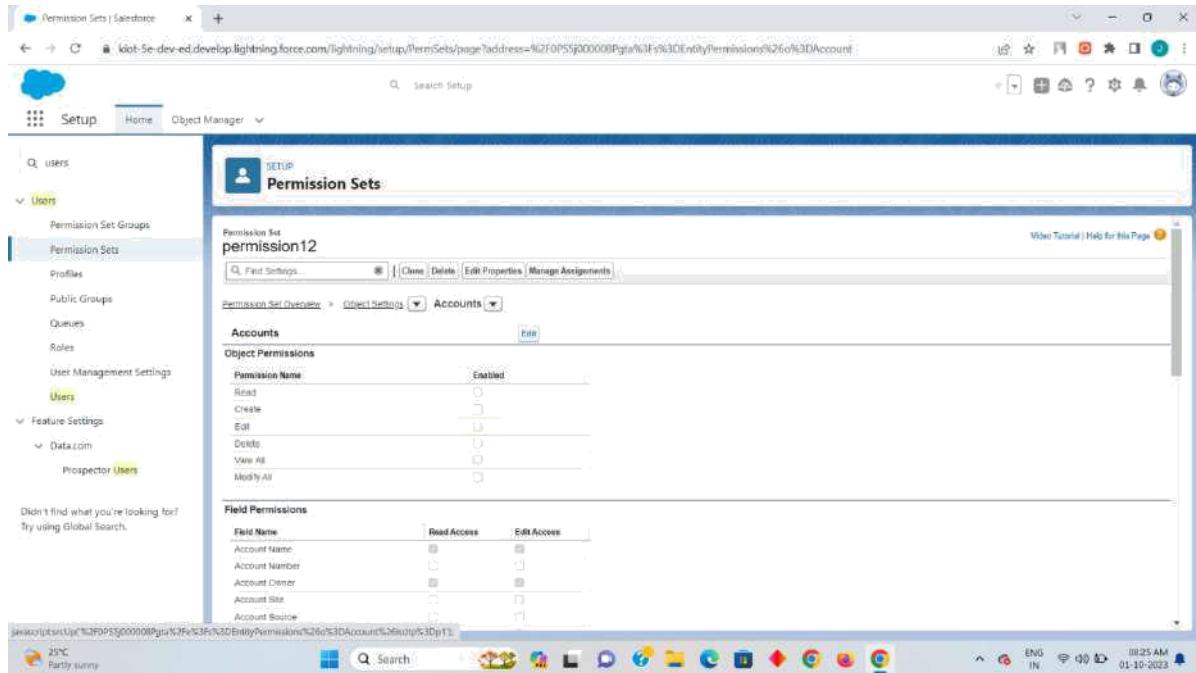
Object Settings

Object Settings

Object Name	Object Permissions	Total Fields	Tab Settings
Account Brands	No Access	3	—
Accounts	No Access	44	—
Altinton Reasons	No Access	—	—
Altinton Invites	No Access	—	—
Alternative Payment Methods	No Access	27	—
API Approval Event Stores	No Access	14	—
Asia Analytics Guru 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 Loss	No Access	—	—
Appointment Task Time Slots	No Access	9	—
Asset Actions	No Access	30	—
Asset Action Sources	No Access	18	—

API Version: 100.0

08:25 AM 01-10-2023



Step 7:

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

Permission Set | Salesforce

Setup Home Object Manager

Q Search

Users

Permission Set Groups

Permission Sets

permission12

Object Settings Clone Delete Edit Properties Manage Assignments

Object Overview Object Settings Accounts

Accounts

Object Permissions

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

Field Permissions

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

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Permission Set | Salesforce

Setup Home Object Manager

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permission12

Object Settings Clone Delete Edit Properties Manage Assignments

Object Overview Object Settings Accounts

Accounts

Object Permissions

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

Field Permissions

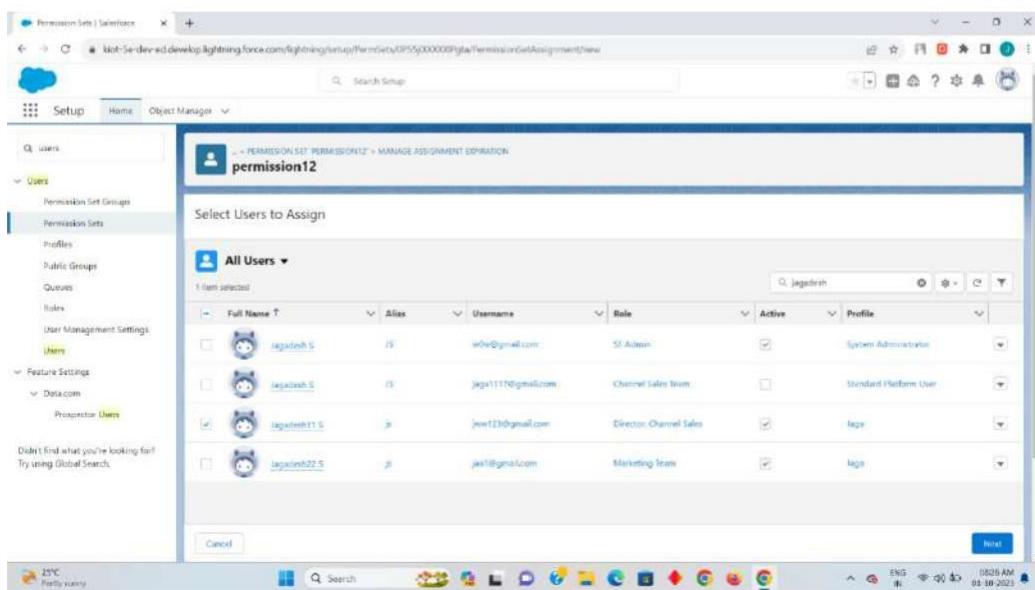
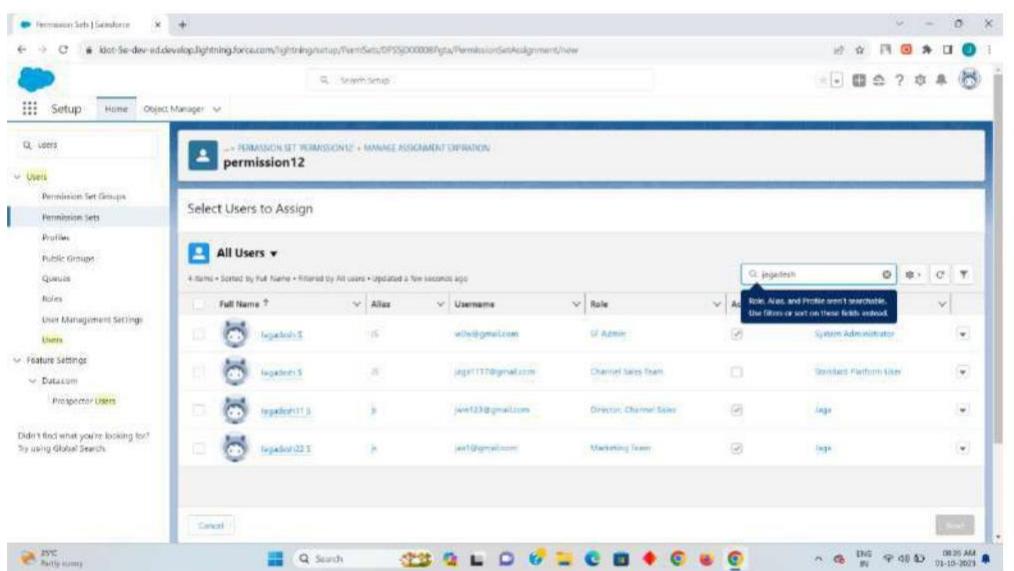
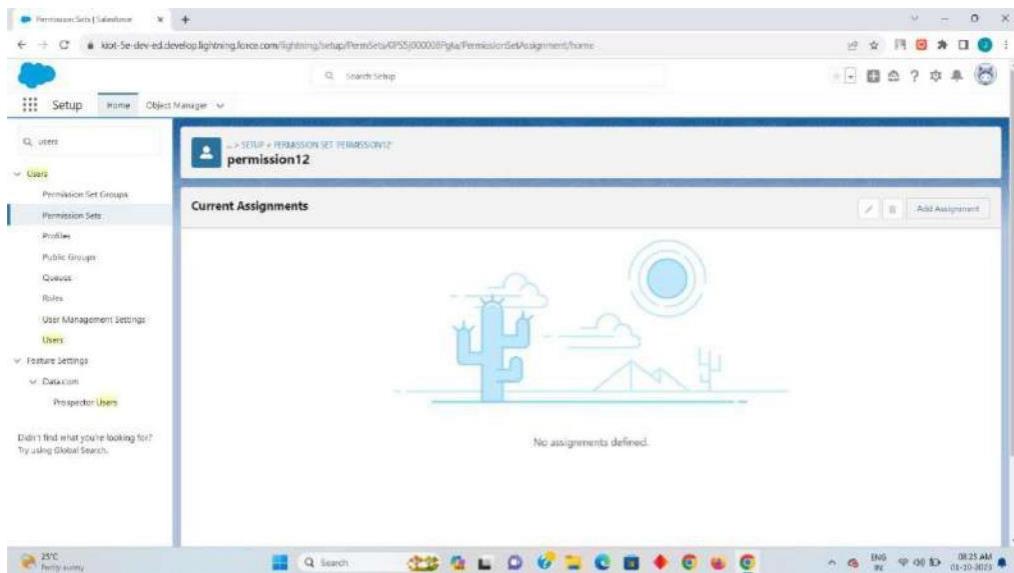
Field Name	Read Access	Edit Access
Account Name	<input type="checkbox"/>	<input type="checkbox"/>
Account Number	<input type="checkbox"/>	<input type="checkbox"/>
Account Owner	<input type="checkbox"/>	<input type="checkbox"/>
Account Site	<input type="checkbox"/>	<input type="checkbox"/>
Account Source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

https://hot-5e-dev-ed.develop.my.salesforce.com/one/breakpoint/authRedirect/OPS5J00000Pgrzle7s-EntityPermissions&do=Account&skip=0

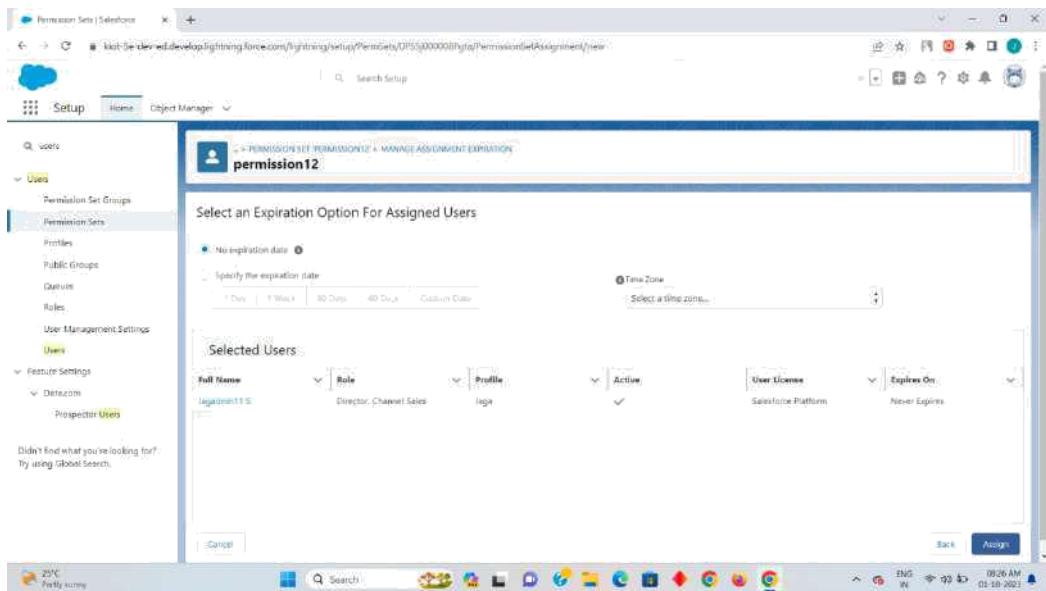
25°C Partly sunny

Step 8

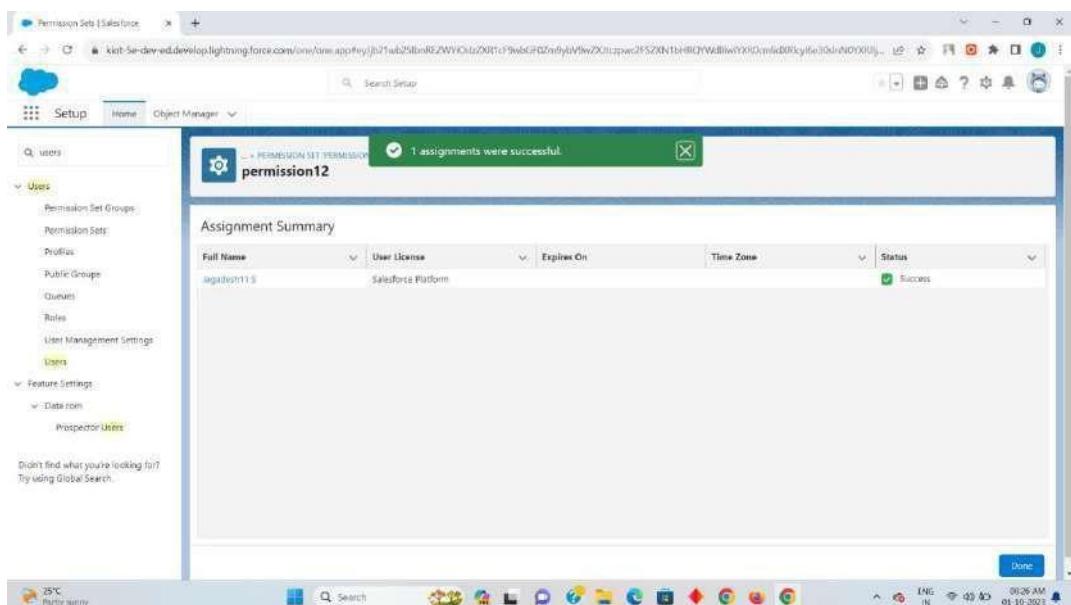
Now click on add assignment there you will find your two created users click on any one user to give a special access as delete on it and then click on assign so that the specific selected user can have a special access as delete on it.



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.**

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.

The screenshot shows the 'Email Template' page in Salesforce. The template name is 'Thank You Email - Survey'. The 'Details' tab is selected. The 'Information' section includes fields for 'Email Template Name' (set to 'Thank You Email - Survey'), 'Related Entity Type' (set to 'Survey Result'), 'Description' (empty), and 'Folder' (set to 'Public Email Templates'). A checkbox labeled 'Made in Email Template Builder' is checked. The 'Message Content' section contains the subject 'Thank You For Completing Our Survey!' and the HTML body:

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

The 'Additional Information' section shows 'Created By' as Rakesh Gupta on 12/21/2020, 4:23 PM, and 'Last Modified By' as Rakesh Gupta on 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.

Buttons: 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.

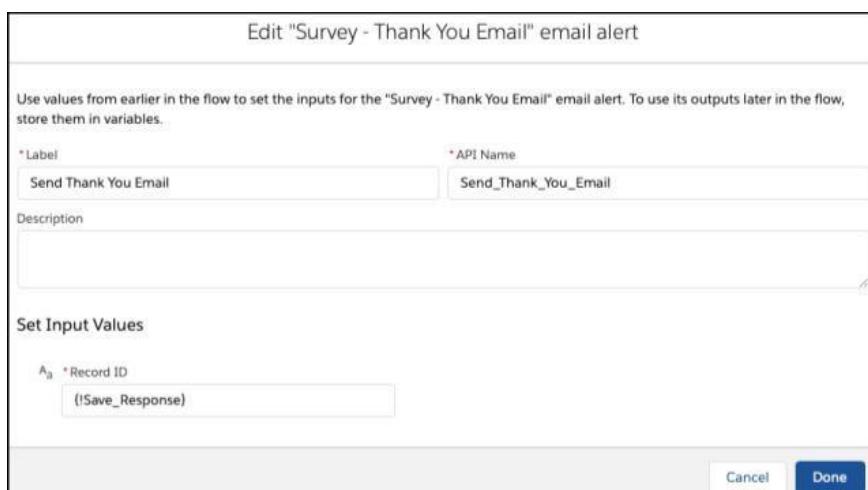
* Label	* API Name
Save Response	Save_Response
Description	
How Many Records to Create <input checked="" type="radio"/> One <input type="radio"/> Multiple	
How to Set the Record Fields <input type="radio"/> Use all values from a record <input checked="" type="radio"/> Use separate resources, and literal values	
Create a Record of This Object * Object Survey Result	
Set Field Values for the Survey Result	
Field	Value
Comment__c	<input type="text"/> A3 Comment X
Field	Value
Email__c	<input type="text"/> A3 Email > Value X
Field	Value
Name__c	<input type="text"/> (!Name.firstName) (!Name.lastName)
Field	Value
Rating__c	<input type="text"/> A3 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

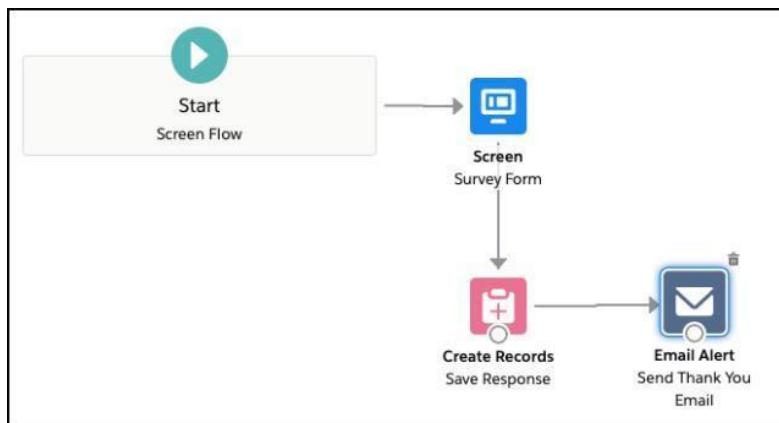
The next step is to call the **Survey – Thank You Email** email alert from flow so that when flow fires it triggers the thank you email to survey participants.

- 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.**



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



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

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

5. Type: Screen Flow

6. API Version for Running the Flow: 51

7. Interview Label: Survey

{!\$Flow.CurrentDateTime}

8. Click Save.

Save as

A New Version A New Flow

* Flow Label Survey * Flow API Name Survey

Description

Hide Advanced

How to Run the Flow ⓘ User or System Context—Depends on How Flow is Launched

* Type Screen Flow

* API Version for Running the Flow 51

Interview Label ⓘ

Insert a resource... Survey {!\$Flow.CurrentDateTime}

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

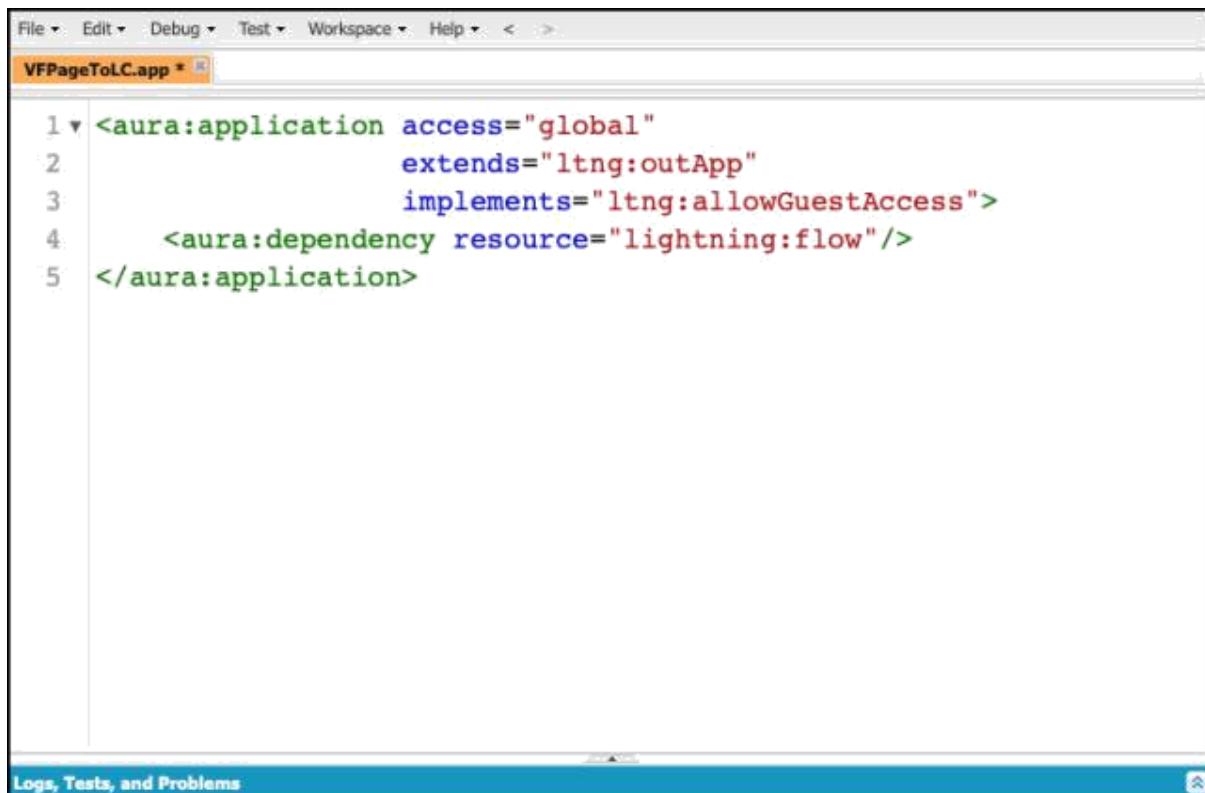
Status: Active Type: Screen Flow Version Number: 2

Cancel Save

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

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

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



The screenshot shows the Eclipse IDE interface with the following details:

- Menu Bar:** File, Edit, Debug, Test, Workspace, Help.
- Title Bar:** VFPageToLC.app *
- Code Editor:** Displays the following XML code:

```
1 <aura:application access="global"
2             extends="ltng:outApp"
3             implements="ltng:allowGuestAccess">
4     <aura:dependency resource="lightning:flow"/>
5 </aura:application>
```
- Bottom Status Bar:** 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'), and Description. It also has checkboxes for 'Available for Lightning Experience, Experience Builder mode, and the mobile app' (unchecked) and 'Require CSRF protection on GET requests' (unchecked). Below this is the 'Visualforce Markup' tab, which contains the following code:

```
<apex:page showheader="false" lightningStylesheets="true">
<html>
    <head>
        <apex:includeLightning />
        <!--Use apex:includeLightning to add the Lightning Components for Visualforce JavaScript library to your Visualforce page-->
    </head>
    <body class="slds-scope">
        <div id="flowContainer" />
        <script>
            var statusChange = function (event) {
                if(event.getParam("status") === "FINISHED") {
                    var outputVariables = event.getParam("outputVariables");
                    var key;
                    for(key in outputVariables) {
                        if(outputVariables[key].name === "myOutput") {
                            ...
                        }
                    }
                };
                $Lightning.use("c:WFPageToFLC", 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	<input type="button" value="i"/>
Site Name	Survey	<input type="button" value="i"/>
Site Description	<input type="text"/>	
Site Contact	Rakesh Gupta	<input type="button" value="i"/> <input type="button" value=""/>
Default Record Owner	Rakesh Gupta	<input type="button" value="i"/> <input type="button" value=""/>
Default Web Address	http://kathiara-developer-edition.gus.force.com/survey	
Active	<input checked="" type="checkbox"/> <input type="button" value="i"/>	
Active Site Home Page	Survey	<input type="button" value="i"/> <input type="button" value="Preview"/>
Inactive Site Home Page	InMaintenance	<input type="button" value="i"/> <input type="button" value="Preview"/>
Site Template	SiteTemplate	<input type="button" value="i"/> <input type="button" value=""/>
Site Robots.txt	<input type="text"/>	
Site Favorite Icon	<input type="text"/>	
Analytics Tracking Code	<input type="text"/>	
URL Rewriter Class	<input type="text"/>	
Enable Feeds	<input type="checkbox"/>	
Clickjack Protection Level	Allow framing by the same origin only (Recommended)	
Require Secure Connections (HTTPS)	<input checked="" type="checkbox"/> <input type="button" value="i"/>	
Lightning Features for Guest Users	<input checked="" type="checkbox"/> <input type="button" value="i"/>	
Upgrade all requests to HTTPS	<input checked="" type="checkbox"/> <input type="button" value="i"/>	
Enable Content Sniffing Protection	<input checked="" type="checkbox"/> <input type="button" value="i"/>	
Enable Browser Cross Site Scripting Protection	<input checked="" type="checkbox"/> <input type="button" value="i"/>	
Referrer URL Protection	<input checked="" type="checkbox"/> <input type="button" value="i"/>	
Guest Access to the Payments API	<input type="checkbox"/> <input type="button" value="i"/>	

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

Proof of Concept

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

Survey

Name

First Name
Alok

Last Name
Sinfal

* Email
[REDACTED]

* Rating
5

* Comment
Awesome Blog 

[Next](#)

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

