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Salesforce Developer(Course)
Assignment no 1

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Year & Dep : 4th year & IT
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1.Create a Master-Detail Relationship between two Custom objects and also create a Roll Up Summary Field to Calculate total number of records.

Solution:

Step 1: Create Custom Objects

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

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

- Header:** Search bar with "Search Setup" and various navigation icons.
- Breadcrumbs:** Setup > Home > Object Manager > New Custom Object
- Title:** New Custom Object
- Message Bar:** A yellow bar at the top states: "Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more!](#) [Don't show this message again](#)".
- Custom Object Definition Edit:** Buttons for Save, Save & New, and Cancel.
- Custom Object Information:** A section with required fields:
 - Label:** college (Example: Account)
 - Plural Label:** colleges (Example: Accounts)
 - Starts with vowel sound:**
- Object Name:** college (Example: Account)
- Description:** (Large text area)
- Context-Sensitive Help Setting:**
 - Open the standard Salesforce.com Help & Training window
 - Open a window using a Visualforce page
- Content Name:** None
- Enter Record Name Label and Format:** A section describing the Record Name field:
 - Record Name:** college Name (Example: Account Name)
 - Data Type:** Text
- Optional Features:**
 - Allow Reports
 - Allow Activities
 - Track Field History
 - Allow in Chatter Groups
 - Enable Licensing (i)
- Object Classification:** A section about enterprise application 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:** A section about search availability:
 - When this setting is enabled, your users can find records of this object type when they search. [Learn more](#).
 - Allow Search
- Object Creation Options (Available only when custom object is first created):**
 - Add Notes and Attachments related list to default page layout
 - Launch New Custom Tab Wizard after saving this custom object
- Buttons at the bottom:** Save, Save & New, 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 indicates that permissions for the object are disabled for all profiles by default. The 'Custom Object Definition Edit' page is displayed, with the 'Custom Object Information' section active. It shows fields for 'Label' (department) and 'Plural Label' (departments), both with examples of 'Account'. There's also a checkbox for 'Starts with vowel sound'. The 'Object Name' field is set to 'department' with an example of 'Account'. A 'Description' text area is empty. Under 'Context-Sensitive Help Setting', the 'Open the standard Salesforce.com Help & Training window' option is selected. The 'Content Name' dropdown is set to 'None'. The 'Enter Record Name Label and Format' section includes a note about record names appearing in various lists and search results. It shows 'Record Name' as 'Department Name' with an example of 'Account Name' and 'Data Type' as 'Text'. The 'Optional Features' section contains several checkboxes for enterprise features like reports, activities, and field history, none of which are checked. The 'Object Classification' section has checkboxes for sharing, bulk API access, and streaming API access, all of which are checked. The 'Deployment Status' section shows 'Deployed' is selected. The 'Search Status' section has an unchecked checkbox for 'Allow Search'. The 'Object Creation Options' section is collapsed. At the bottom are 'Save', 'Save & New', and 'Cancel' buttons.

Step 2: Create a Master-Detail Relationship

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

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

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

SETUP > OBJECT MANAGER
CDepartment

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

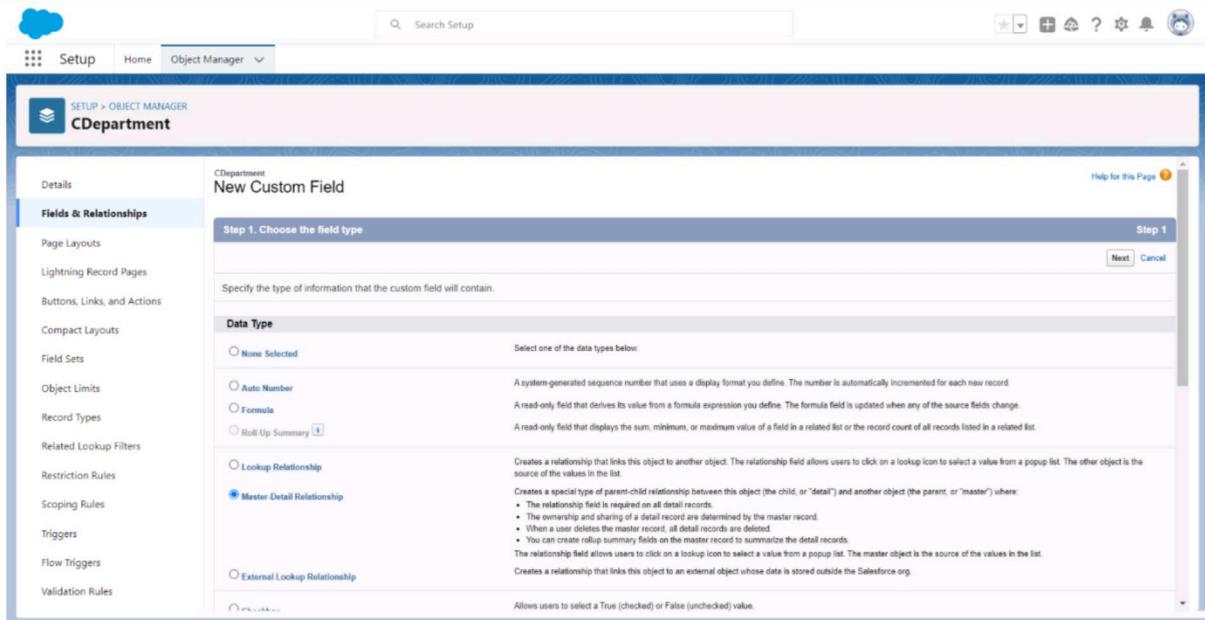
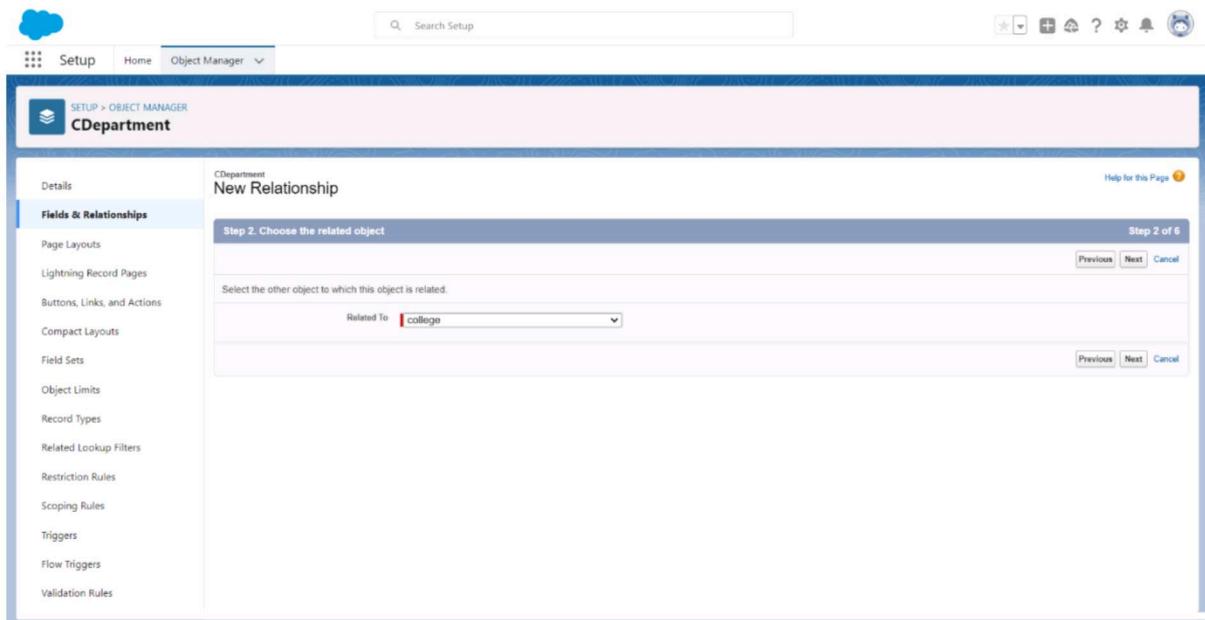
SETUP > OBJECT MANAGER
CDepartment

New Relationship

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

Step 3 of 6

Field Label	college
Field Name	college
Description	
Help Text	
Child Relationship Name	CDepartments
Sharing Setting	Select the minimum access level required on the Master record to create, edit, or delete related Detail records: <input checked="" type="radio"/> Read Only: Allows users with at least Read access to the Master record to create, edit, or delete related Detail records. <input type="radio"/> Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.
Allow reparenting	<input type="checkbox"/> Child records can be reparented to other parent records after they are created
Auto add to custom report type	<input checked="" type="checkbox"/> Add this field to existing custom report types that contain this entity



Step 3: Create the Roll-Up Summary Field

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

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

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

Fields & Relationships					
	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
	college	college__c	Master-Detail(college)	college	<input checked="" type="checkbox"/>
	Created By	CreatedBy	Lookup(User)	college	<input checked="" type="checkbox"/>
	Department Name	Name	Text(80)	college	<input checked="" type="checkbox"/>
	Last Modified By	LastModifiedBy	Lookup(User)	college	<input checked="" type="checkbox"/>

The screenshot shows the Salesforce Setup interface under the 'Tabs' section. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar at the top right contains the text 'Search Setup'. Below the navigation, a sidebar on the left lists 'User Interface' options: 'Rename Tabs and Labels' (selected), 'Tabs', and 'Q_ tabs'. The main content area is titled 'Custom Tabs' and contains a message: 'You can create new custom tabs to extend Salesforce functionality or to build new application functionality.' It describes four types of tabs: Custom Object tabs, Web tabs, Visualforce tabs, Lightning Component tabs, and Lightning Page tabs. Under 'Custom Object Tabs', there is a table:

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

Below this are sections for '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), and 'Lightning Page Tabs' (No Lightning Page Tabs have been defined). The top right corner of the content area has a 'Help for this Page' link.

The screenshot shows the Salesforce Setup interface under 'OBJECT MANAGER' for the 'college' object. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar at the top right contains the text 'college'. The main content area is titled 'New Custom Field' and shows 'Step 5. Add to page layouts'. On the left, a sidebar lists various configuration options under 'Fields & Relationships': Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, Scoping Rules, Triggers, Flow Triggers, and Validation Rules. The main form displays field details: Field Label 'Total count', Data Type 'Roll-Up Summary', and Field Name 'Total_count'. It also includes a note about selecting page layouts and checkboxes for 'Add Field' and 'Page Layout Name' (with 'college Layout' selected). At the bottom, a note says 'When finished, click Save & New to create more custom fields, or click Save if you are done.' The top right corner has a 'Help for this Page' link.

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

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

The screenshot shows the Salesforce Object Manager interface for creating a new custom field named "Total count" on the "college" object. The "Step 3. Define the summary calculation" section is active. It shows the "Master Object" as "college" and the "Summarized Object" as "CDepartments". Under "Select Roll-Up Type", the "COUNT" option is selected. In the "Filter Criteria" section, the "All records should be included in the calculation" radio button is selected.

college New Custom Field

Step 2. Enter the details Step 2 of 5

Field Label: Total count

Field Name: Total_count

Description:

Help Text:

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

Previous Next Cancel

college New Custom Field

Step 1. Choose the field type Step 1

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

Data Type

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

Next Cancel

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', 'Object Manager', and a search bar with the query 'college'. Below the navigation is a breadcrumb trail: 'SETUP > OBJECT MANAGER college'. The main content area is titled 'Fields & Relationships' and displays four items sorted by Field Label. A table lists the fields: 'college Name' (Field Label), 'Name' (Field Name), 'Text(80)' (Data Type), and a checkmark in the 'INDEXED' column. Other fields listed are 'Created By', 'Last Modified By', and 'Owner', each with their respective field names and data types. On the left sidebar, there are links for 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.

Step 4: Create a Lightning App

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

10. Assign the app to users or profiles.

11. Test the app with the assigned users.

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

Step 2. Add to Profiles Step 2 of 3

Choose the user profiles for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each profile.

Apply one tab visibility to all profiles Default On
 Apply a different tab visibility for each profile

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

Previous Next Cancel

The screenshot shows the 'Setup' tab selected in the top navigation bar. The main content area is titled 'Tabs' under the 'User Interface' category. A search bar at the top right contains the text 'Search Setup'. Below the search bar are several small icons for navigating the page.

The current step is 'Step 1. Enter the Details' of a 'New Custom Object Tab'. The sub-step is 'Step 1 of 3'. The page instructions say to choose a custom object for the new tab. A dropdown menu shows 'Object: college' and a 'Tab Style' dropdown shows 'Jewel'. A note says '(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.' A dropdown menu shows 'Splash Page Custom Link: --None--'. There is a text input field for 'Description' which is currently empty. At the bottom right are 'Next' and 'Cancel' buttons.

The screenshot shows the 'Setup' tab selected in the top navigation bar. The main content area is titled 'Tabs' under the 'User Interface' category. A search bar at the top right contains the text 'Search Setup'. Below the search bar are several small icons for navigating the page.

The current step is 'Step 3. Add to Custom Apps' of the 'New Custom Object Tab' configuration. The sub-step is 'Step 3 of 3'. The page instructions say to choose custom apps for the new tab. A table lists various custom apps with a column for 'Include Tab' which has a checked checkbox. At the bottom right are 'Previous', 'Save', and 'Cancel' buttons.

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

New Custom Object Tab

Step 1. Enter the Details Step 1 of 3

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

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

Object	CDDepartment
Tab Style	Lightning

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

Splash Page Custom Link: --None--

Description:

Next **Cancel**

Lightning Experience App Manager

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

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

New Lightning App **New Connected App**

Salesforce Setup interface showing the 'Tabs' section under 'User Interface'.

Custom Tabs

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

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

Custom Object Tabs

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

Web Tabs

No Web Tabs have been defined.

Visualforce Tabs

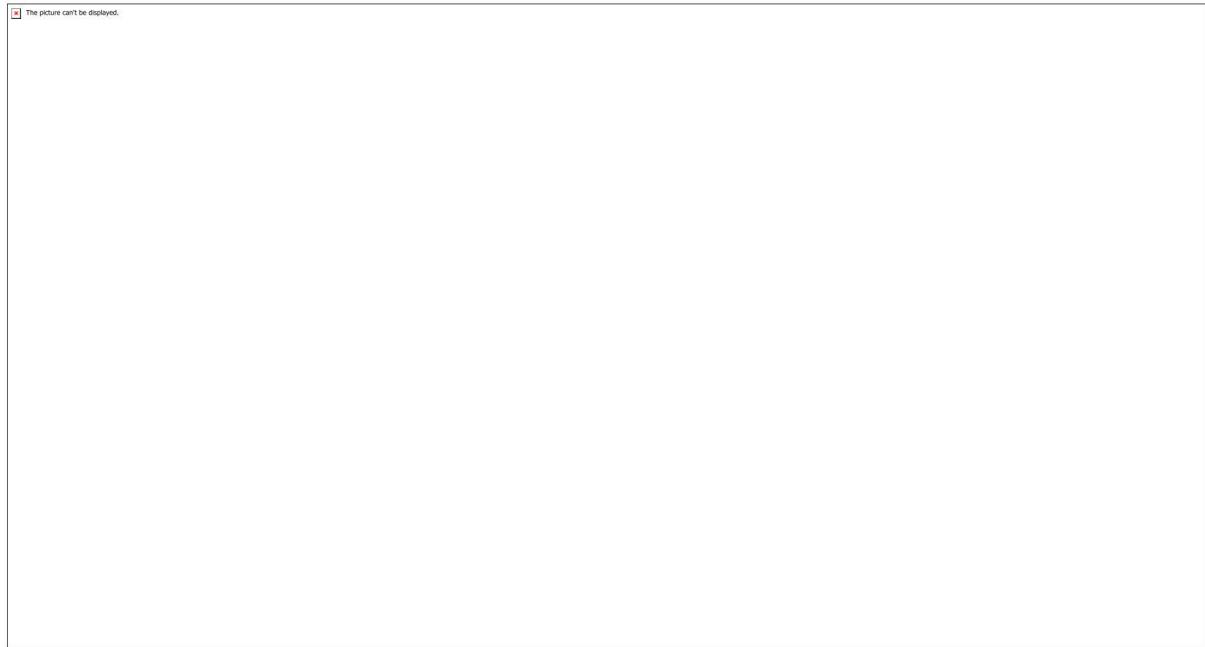
No Visualforce Tabs have been defined.

Lightning Component Tabs

No Lightning component tabs have been defined.

Lightning Page Tabs

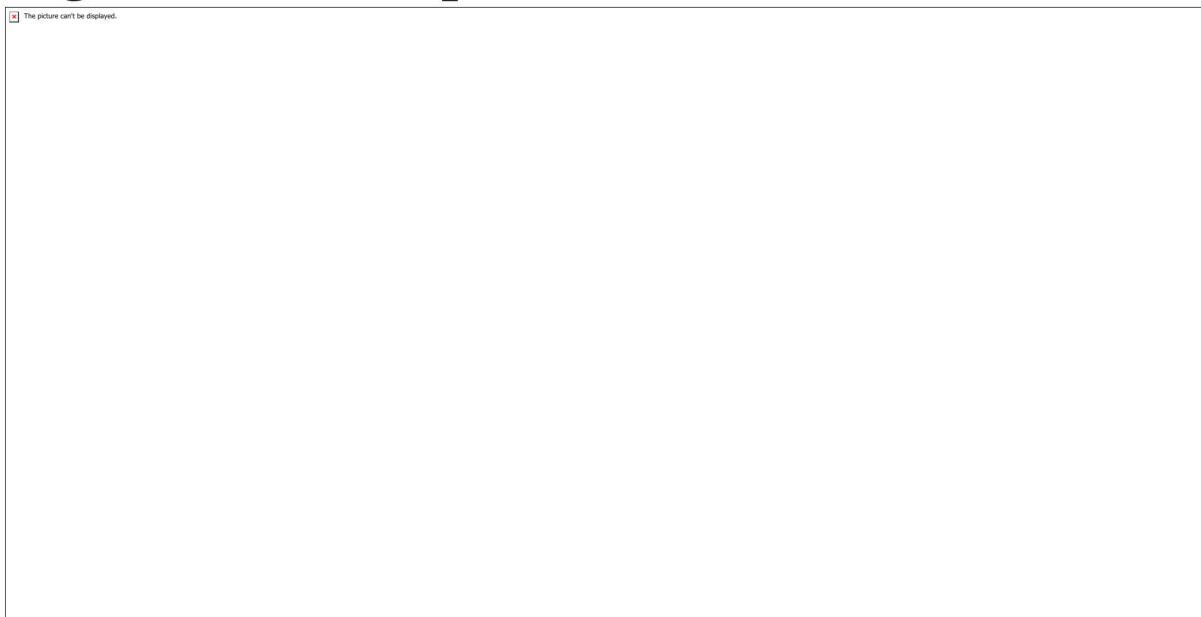
No Lightning Page Tabs have been defined.

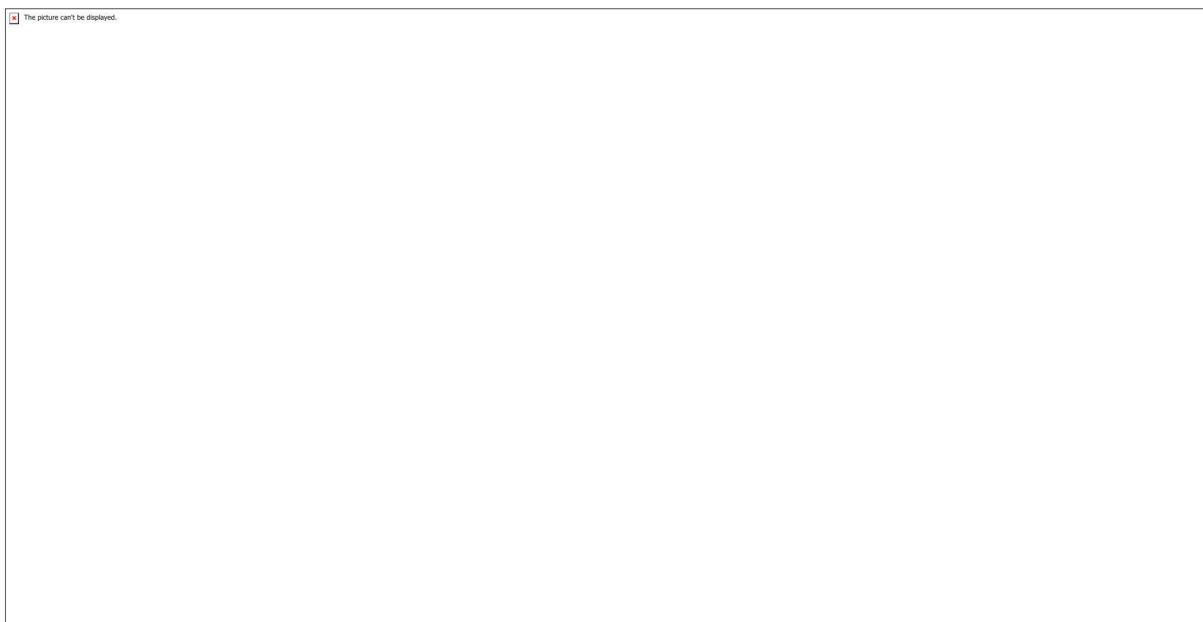
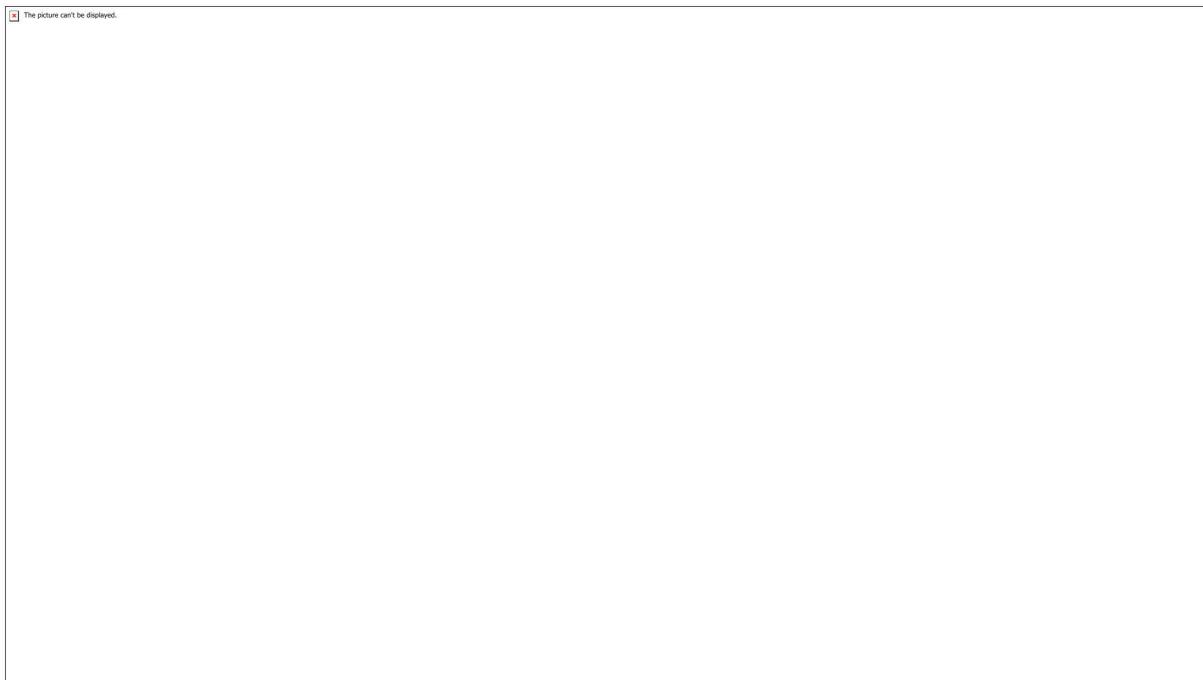


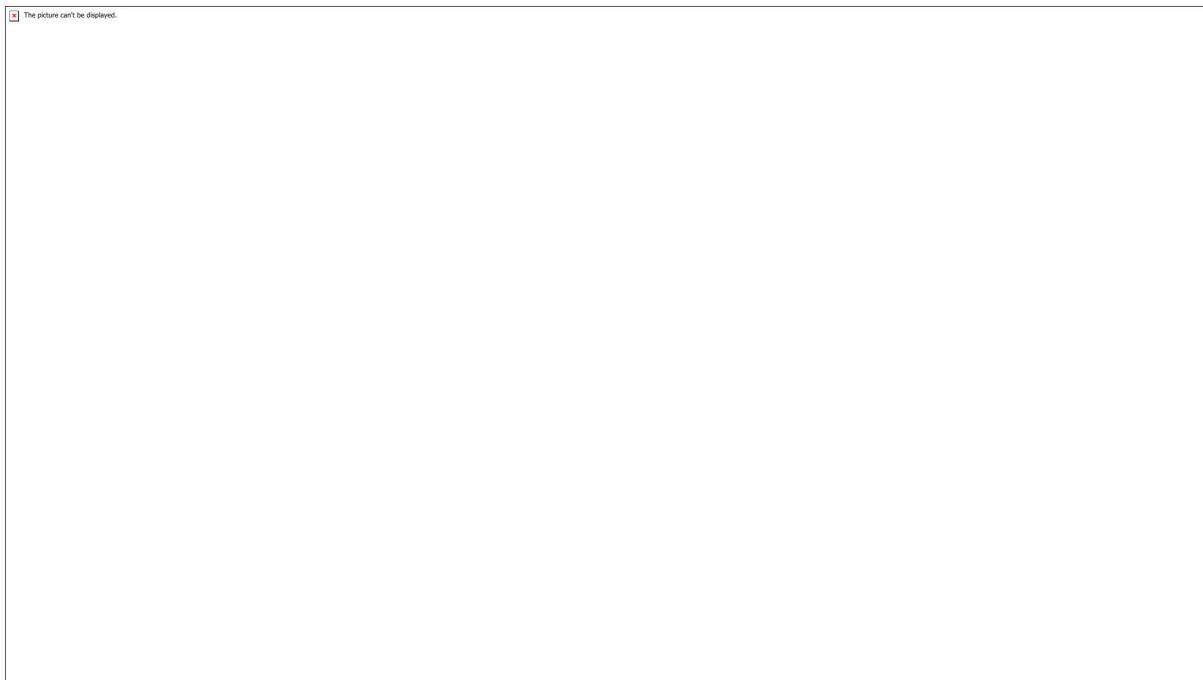
Conclusion:

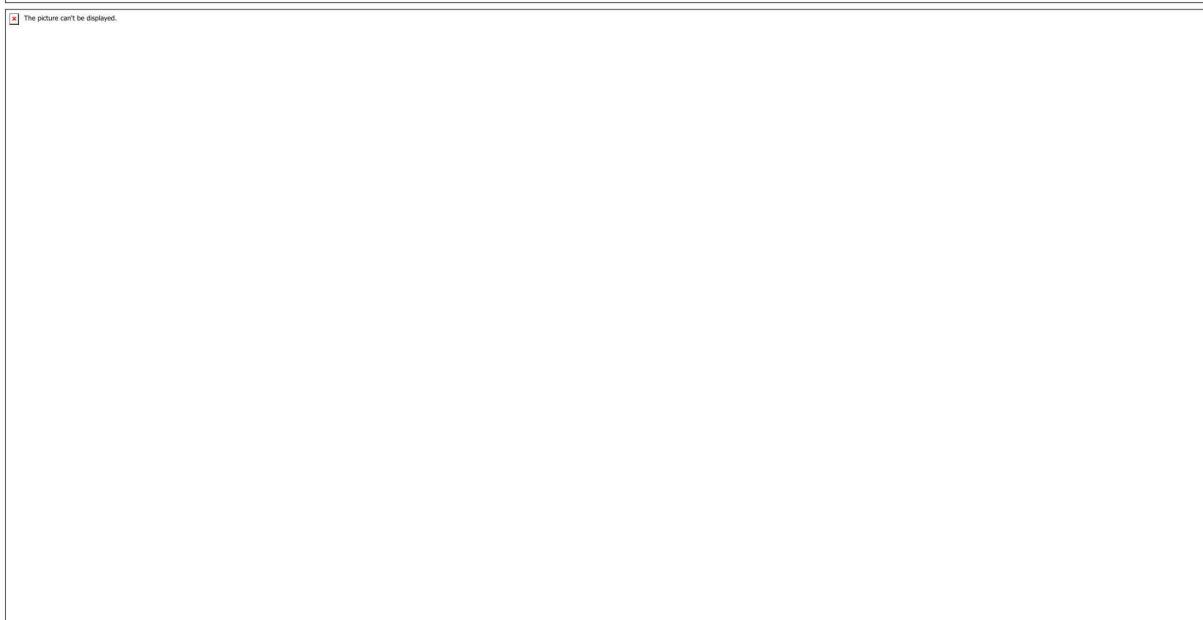
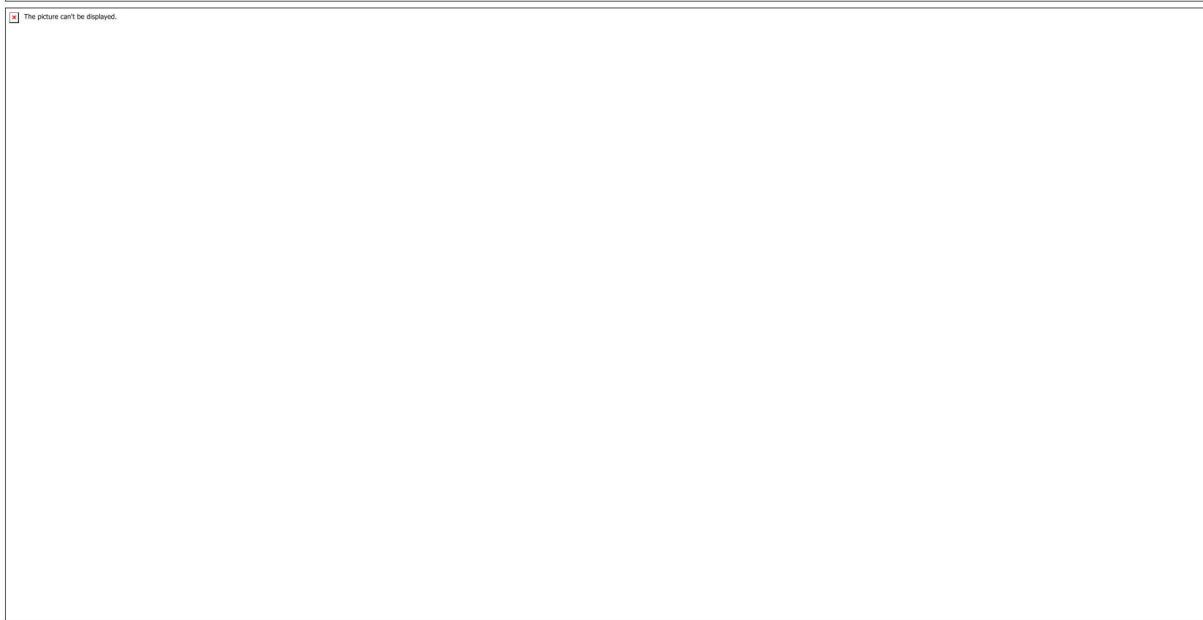
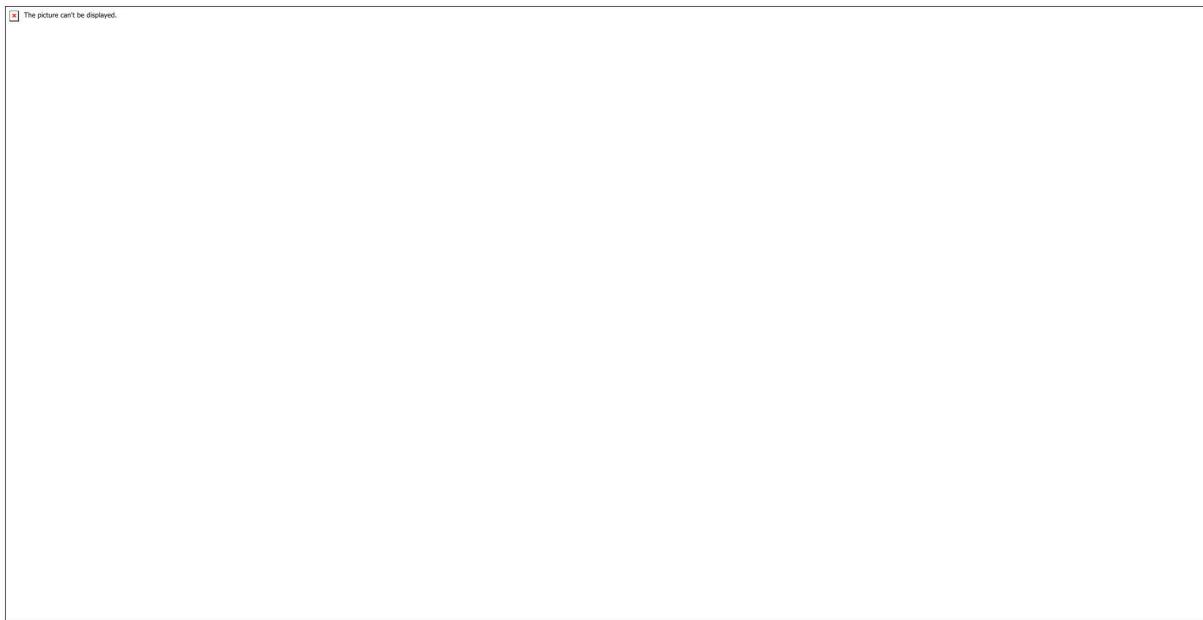
Now, whenever you create or update a record in the "Department_c" related to a "College_c," the "TotalCount_c" field on the "College_c" will automatically update to show the total number of related records.

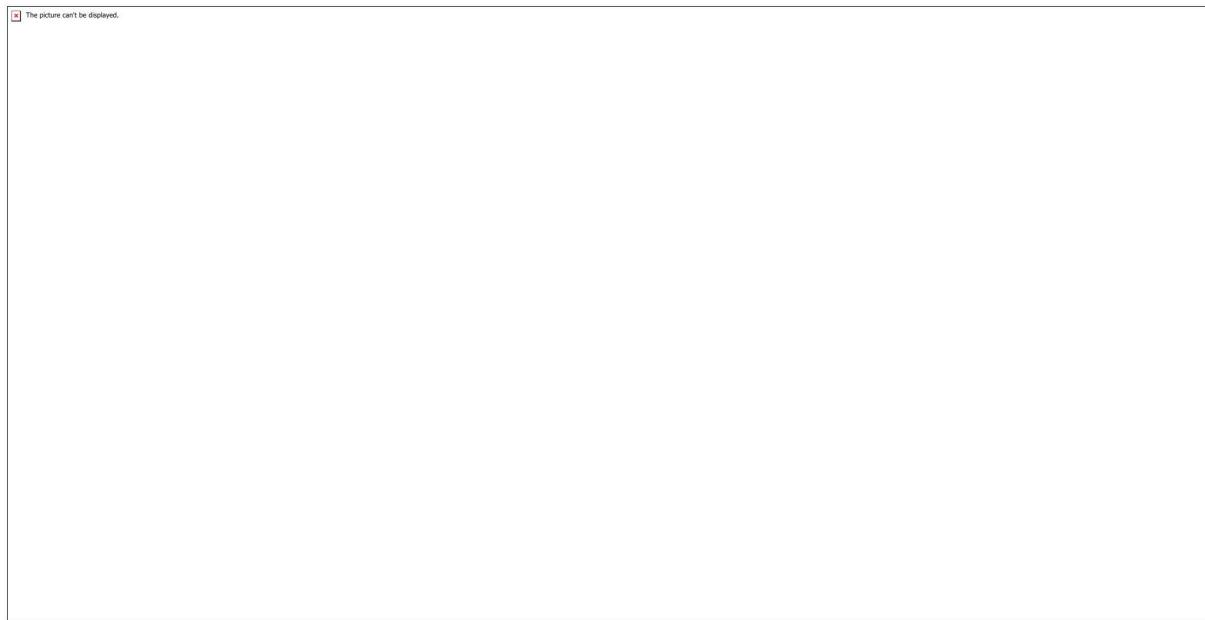
Remember to adjust field-level security, validation rules, and page layouts as needed to ensure that your custom objects and fields are appropriately configured for your organization's requirements.











MECW

My college colleges CDepartments student Content

Search...

New Contact Edit New Opportunity

college mecw

Details

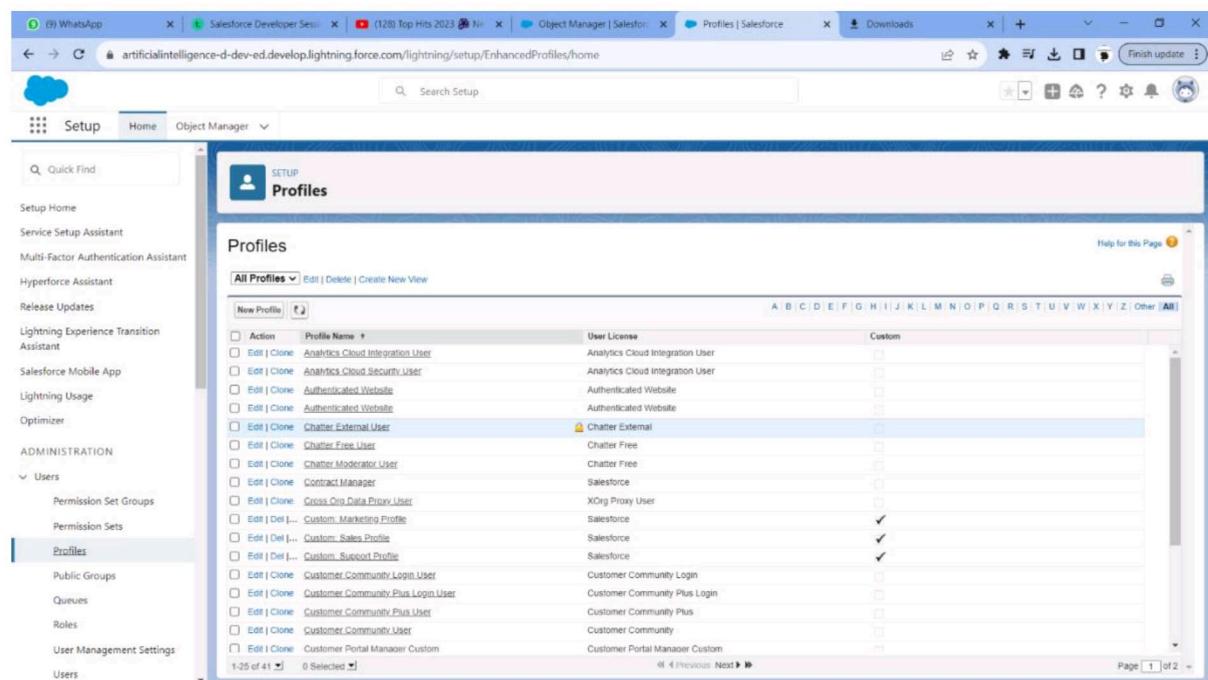
college Name	mecw	Owner	krishna s
Total count	2		
phone	9087116402		
Email	kiof@gmail.com		
Location	90, 80		
Created By	krishna s - 01/10/2023, 11:16 am	Last Modified By	krishna s - 01/10/2023, 11:19 am

History

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

Solution:

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



The screenshot shows the Salesforce Setup interface with the 'Profiles' page selected. The left sidebar includes links for Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, Administration, Users, Permission Set Groups, Permission Sets, and Profiles. The main content area displays a table of profiles with columns for Action, Profile Name, User License, and Custom. The 'Custom' column contains checkmarks for certain profiles. The table lists profiles such as Analytics Cloud Integration User, Analytics Cloud Security User, Authenticated Website, Chatter External, Chatter Free, Chatter Moderator, Contract Manager, Cross Org Data Proxy User, Custom Marketing Profile, Custom Sales Profile, Custom Support Profile, Customer Community Login User, Customer Community Plus Login User, Customer Community Plus User, Customer Community User, and Customer Portal Manager Custom. The 'User License' column provides details for each profile, such as 'Analytics Cloud Integration User' being associated with 'Analytics Cloud Integration User' and 'Authenticated Website' being associated with 'Authenticated Website'.

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

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

Profiles

All Profiles | Edit | Delete | Create New View

New Profile

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

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

1-7 of 7 0 Selected

Page 1 of 1

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

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

Profiles

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

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

Save Cancel

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

Clone Profile

Enter the name of the new profile

You must select an existing profile to clone from.

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

Save Cancel

Help for this Page

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

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

Profile 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
User License	Salesforce Platform
Description	
Created By	GOPAL S. 01/10/2023, 7:09 pm
Modified By	GOPAL S. 01/10/2023, 7:09 pm

Page Layouts

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

Help for this Page

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

Salesforce Developer Session | artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j00000WQJbz%2Fe%3FretURL%3D%252F00e5j0... | Profiles | Salesforce

Manager

Set the permissions and page layouts for this profile.

Profile Edit

Name	Manager	User License	Salesforce Platform	Description		Custom Profile	<input checked="" type="checkbox"/>
------	---------	--------------	---------------------	-------------	--	----------------	-------------------------------------

Custom App Settings

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

Service Provider Access

Tab Settings

Overwrite users' personal tab customizations

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

Communication Subscription Channel Types

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

Custom Object Permissions

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

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

- User passwords expire in: 90 days
- Enforce password history: 3 passwords remembered
- Minimum password length: 8

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

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

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

Custom Object Permissions

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

Session Settings

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

Password Policies

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

Enhancement Requests

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

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

Custom Object Permissions

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

Session Settings

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

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

Enhancement Requests

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

Setup Home Object Manager

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"/>											
Enhancement Requests	<input checked="" type="checkbox"/>											

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

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

Users

All Users

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

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

View: All Users | Edit | Create New User

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit Login	Adriana_Civil	dadan	test_dadan_4w@hyb69wtk.tzggrgzbkxix_3q@chattercommunity.h43hkzw6me@gmail.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	Chatter_Expert	Chatter	chatty_00d500000bc5skkeab.lo0fammonia@chatter.salesforce.com		<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/> Edit Login	Ellington_Amelia	ash	amelia.ellington.1.46kcp9boohhdcwyedcu4wh.bnbdwmyvheloh.wguctor1dah@gmail.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	S_GOPAL	GS	kot1520@gmail.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Integration	integ	integration@00d500000bc5skkeab.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User
<input type="checkbox"/> Edit	User_Security	sec	insightssecurity@00d500000bc5skkeab.com		<input checked="" type="checkbox"/>	

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

Finish update

Setup Home Object Manager

Users

New User

User Edit Save Save & New Cancel

General Information

First Name	sowmiya
Last Name	bala
Alias	sbala
Email	2k20cse179@kiot.ac.in
Username	2k21n@kiot.ac.in
Nickname	User169616771282564526
Title	worker
Company	kiot bank
Department	
Division	

Role <None Specified>

User License Salesforce Integration

Profile Salesforce API Only System Integrations

Active

Marketing User

Offline User

Knowledge User

Flow User

Service Cloud User

Site.com Contributor User

Site.com Publisher User

WDC User

Data.com User Type -None-

Data.com Monthly Addition Limit Default Limit (300)

Accessibility Mode (Classic Only)

High-Contrast Palette on Charts

Load Lightning Pages While Scrolling

Debug Mode

Help for this Page

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

Finish update

Setup Home Object Manager

Users

New User

User Edit Save Save & New Cancel

General Information

First Name	sowmiya
Last Name	bala
Alias	sbala
Email	2k20cse179@kiot.ac.in
Username	2k21n@kiot.ac.in
Nickname	User169616771282564526
Title	worker
Company	kiot bank
Department	
Division	

Role <None Specified>

User License Salesforce Platform

Profile Manager

Active

Marketing User

Offline User

Knowledge User

Flow User

Service Cloud User

Site.com Contributor User

Site.com Publisher User

WDC User

Data.com User Type -None-

Data.com Monthly Addition Limit Default Limit (300)

Accessibility Mode (Classic Only)

High-Contrast Palette on Charts

Load Lightning Pages While Scrolling

Debug Mode

Help for this Page

Screenshot of the Salesforce Developer Console showing the User Management setup page for a new user named "sowmya bala".

User Detail:

- Name: sowmya bala
- Alias: bala
- Email: 2k20case179@kiot.ac.in [Verify]
- Username: 2k21it@kiot.ac.in
- Nickname: User16961677128256452016
- Title: worker
- Company: kiot bank
- Department:
- Division:
- Address:
- Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata)
- Locale: English (India)
- Language: English
- Delegated Approver:
- Manager:
- Receive Approval Request Emails: Only if I am an approver
- Federation ID:
- App Registration: One-Time Password Authenticator
- App Registration: Salesforce Authenticator

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
- Data.com User Type
- Accessibility Mode (Classic Only)
- Debug Mode
- High-Contrast Palette on Charts
- Load Lightning Pages While Scrolling (checked)
- Salesforce CRM Content User (checked)

Screenshot of the Gmail inbox showing an email from support@salesforce.com with the subject "Welcome to Salesforce!".

The email body contains:

Welcome to Salesforce!

Click below to verify your account.

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

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

Username:
 2k21it@kiot.ac.in

Again, welcome to Salesforce!

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Change Your Password

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

- 8 characters
- 1 letter
- 1 number

* New Password Good

* Confirm New Password Match

Security Question In what city were you born?

* Answer salem

Change Password

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

Login | Salesforce

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

salesforce

Username 2k21it@kiot.ac.in

Password

Log In

Remember me

[Forgot Your Password?](#)

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

AIDay

WATCH ON DEMAND

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Recently Viewed | Bank | Sales... +

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

MECW

mecw Bank customers Home

Bank Recently Viewed

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

Bank Name ↓

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

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

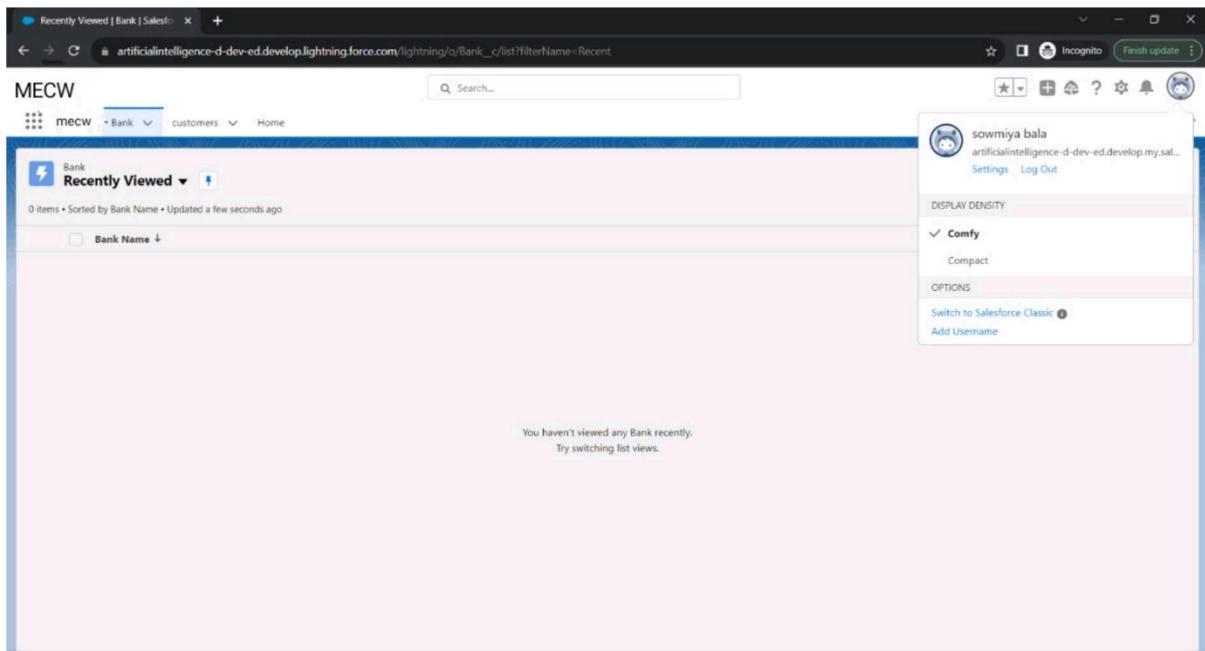
DISPLAY DENSITY

✓ Comfy

Compact

OPTIONS

Switch to Salesforce Classic Add Username



New Bank | Salesforce +

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

mecw Bank customers Home

Bank Recently Viewed

0 items • Updated a few seconds ago

Bank Name ↓

New Bank

* = Required Information

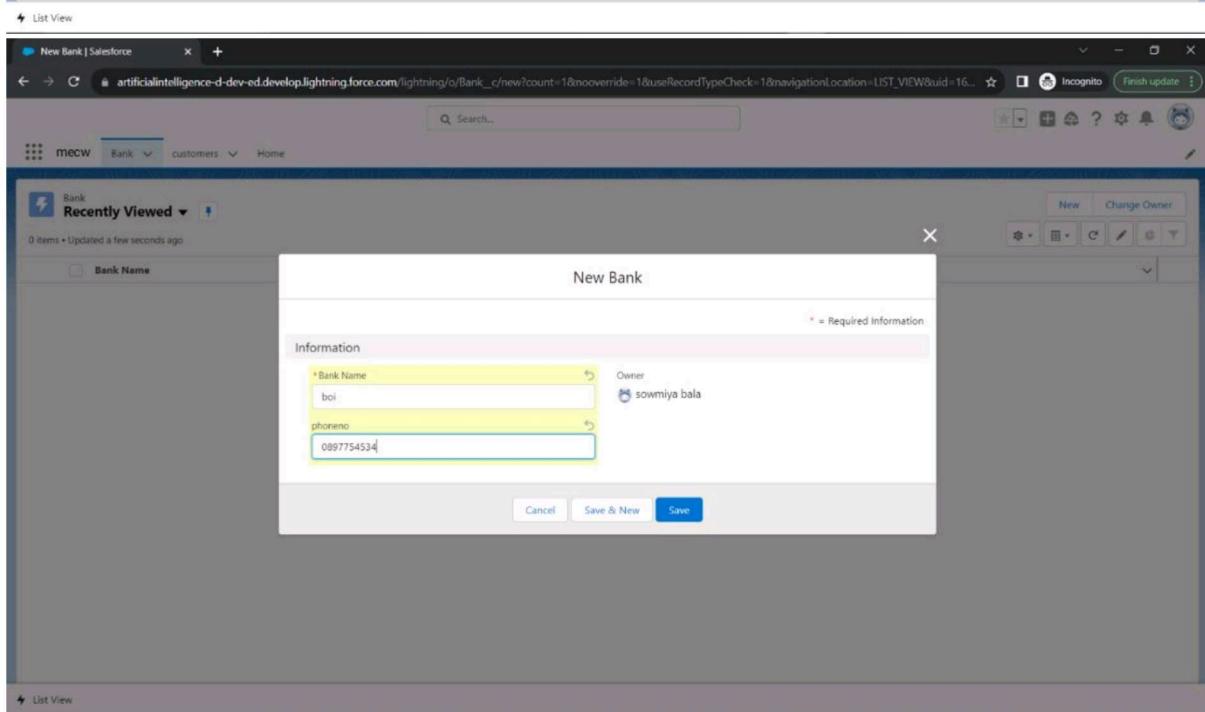
Information

*Bank Name: boi

Owner: sowmiya bala

phoneno: 0897754534

Cancel Save & New Save



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

Top Screenshot: A "New customer" dialog box is open, titled "New customer". It shows fields for "customer Name" (containing "madhu") and "Bank" (containing "boi"). Both fields are marked with a yellow highlight. The dialog includes standard buttons: "Cancel", "Save & New", and "Save".

Bottom Screenshot: The "customer" record for "madhu" is displayed in the "Details" tab. The record contains the following information:

- Related:** Shows the customer name "madhu".
- Details:**
 - customer Name:** madhu
 - Bank:** boi
 - Created By:** sowmiya bala, 01/10/2023, 7:17 pm
 - Last Modified By:** sowmiya bala, 01/10/2023, 7:17 pm

A green banner at the top of the page indicates that the record was created successfully: "✓ customer "madhu" was created."

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

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

Profiles

All Profiles | Edit | Delete | Create New View

New Profile

Action	Profile Name	User License	Custom
<input type="checkbox"/>	Edit Clone	Salesforce API Only System Integrations	Salesforce Integration
<input type="checkbox"/>	Edit Clone	salesmanager	Salesforce
<input type="checkbox"/>	Edit Clone	Silver Partner User	Silver Partner
<input type="checkbox"/>	Edit Clone	Solution 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 | 4 Previous | Next | Page 1 of 1

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

Setup Home
Service Setup Assistant
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ADMINISTRATION
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings

Profiles

Clone Profile

You must select an existing profile to clone from.

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

Save | Cancel

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

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

Quick Find Search Setup

Profiles

Profile salesmanage

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

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

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

Profile Detail

Name: salesmanage User License: Salesforce Platform Description: Created By: QOPALS_01/10/2023, 7:19 pm Modified By: QOPALS_01/10/2023, 7:19 pm Custom Profile: ✓

Page Layouts

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

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

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

Quick Find Search Setup

Profiles

Profile Edit salesmanage

Set the permissions and page layouts for this profile.

Profile Edit

Name: salesmanage User License: Salesforce Platform Description: Custom Profile: ✓

Custom App Settings

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

Service Provider Access

Tab Settings

Overwrite users' personal tab customizations

Standard Tab Settings

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

Salesforce Developer Session 2

Profiles | Salesforce

Welcome to Salesforce: Verify

Finish update

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Hyperforce Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

ADMINISTRATION

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Search Setup

Profiles

Contact Point Emails

User External Credentials

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"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>							
customers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>							

Enhancement Requests

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

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

Salesforce Developer Session 2

Profiles | Salesforce

Welcome to Salesforce: Verify

Finish update

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Hyperforce Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

ADMINISTRATION

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Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Search Setup

Profiles

Contact Point Emails

User External Credentials

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"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>							
customers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>							

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	Must include alpha and numeric characters
Password question requirement: Cannot contain password	Maximum invalid login attempts: 10	Lockout effective period: 15 minutes	
Obfuscate secret answer for password resets	Require a minimum 1 day password lifetime		
Don't immediately expire links in forgot password emails			

Save Save & New Cancel

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

Setup Home Object Manager

Q Search Setup

Users

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Service

Embedded Service

Messaging for In-App and Web User Verification

User Interface

Action Link Templates

Actions & Recommendations

App Menu

New User

User Edit Save Save & New Cancel

General Information

First Name: Role: <None Specified>

Last Name: User License: Salesforce Integration

Alias: Profile: Salesforce API Only System Integrations

Email: Active:

Username: Marketing User:

Nickname: Offline User:

Title: Knowledge User:

Company: Flow User:

Department: Service Cloud User:

Division: Site.com Contributor User:

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

Data.com Monthly Addition Limit: WDC User:

Accessibility Mode (Classic Only): Load Lightning Pages While Scrolling:

High-Contrast Palette on Charts: Debug Mode:

Help for this Page

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

Setup Home Object Manager

Q Search Setup

Users

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Service

Embedded Service

Messaging for In-App and Web User Verification

User Interface

Action Link Templates

Actions & Recommendations

App Menu

New User

User Edit Save Save & New Cancel

General Information

First Name: madhu Role: <None Specified>

Last Name: b User License: Salesforce Platform

Alias: mb Profile: salesmanager

Email: 2k20cse179@kiot.ac.in Active:

Username: 2k20cscut@kiot.ac.in Marketing User:

Nickname: User169616842428654192 Offline User:

Title: worker Knowledge User:

Company: kiot bank Flow User:

Department: Sales Service Cloud User:

Division: Site.com Contributor User:

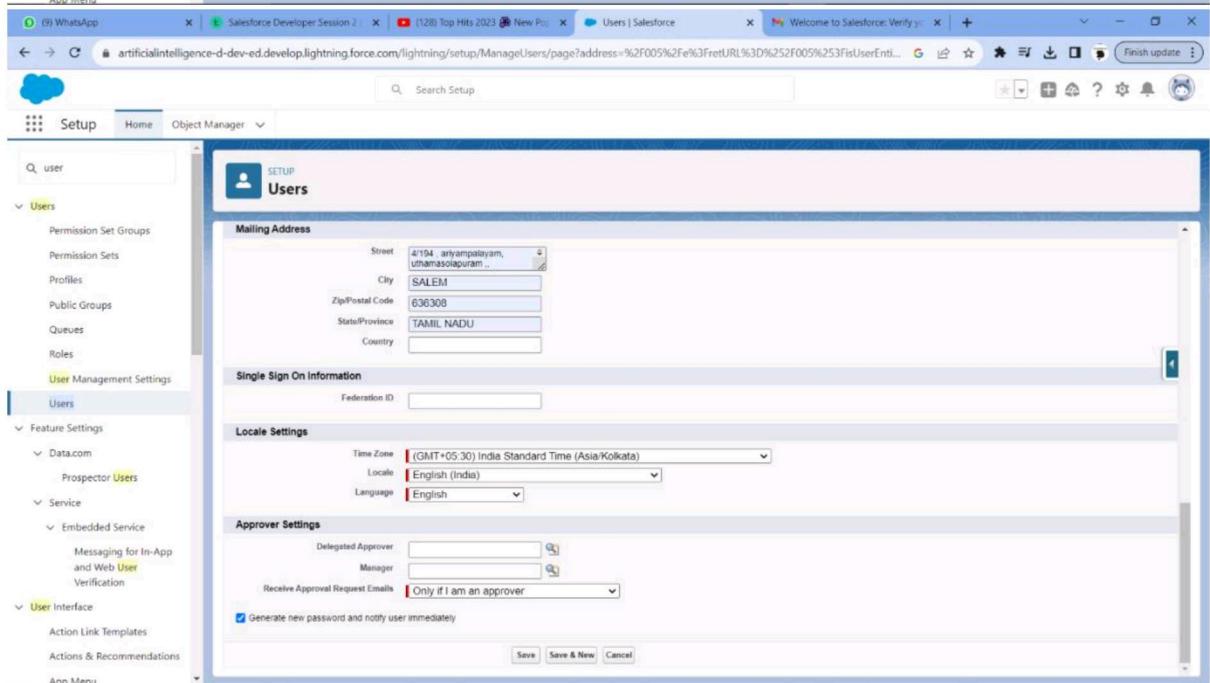
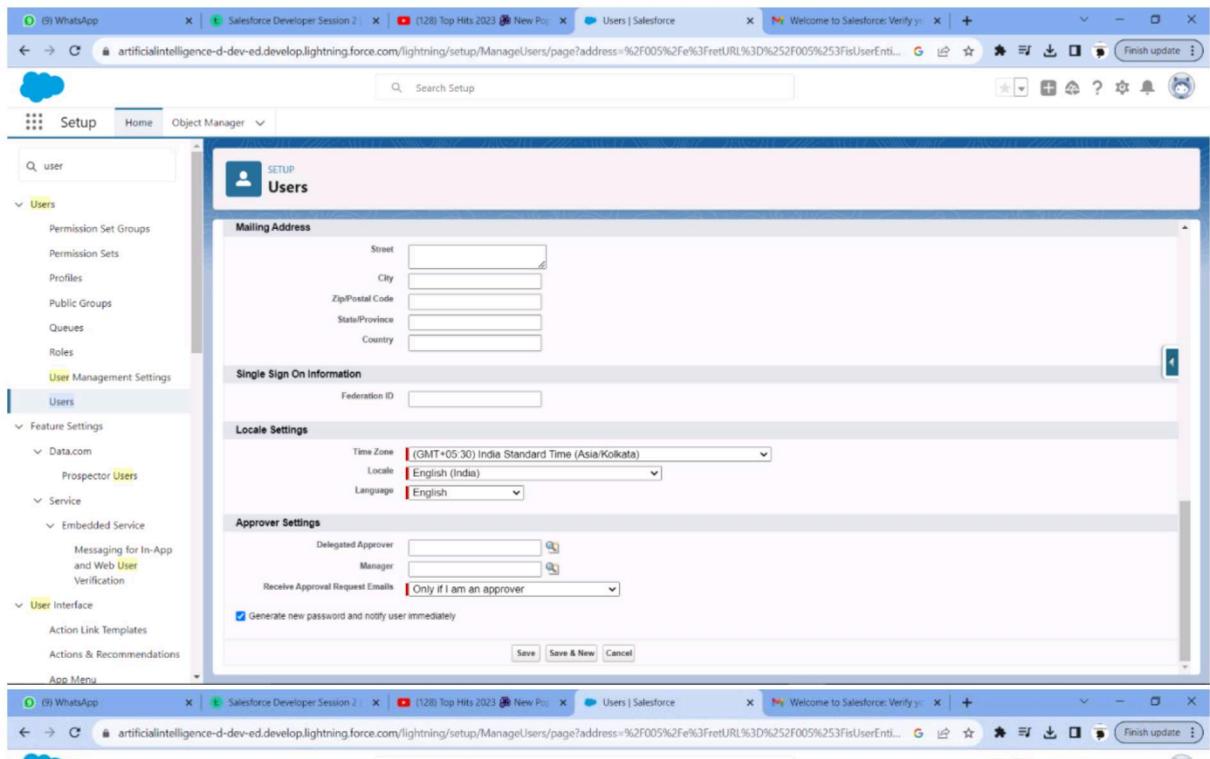
Data.com User Type: Site.com Publisher User:

Data.com Monthly Addition Limit: WDC User:

Accessibility Mode (Classic Only): Load Lightning Pages While Scrolling:

High-Contrast Palette on Charts: Debug Mode:

Help for this Page



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

The User Detail section displays the following information:

Field	Value
Name	madhu b
Alias	mb
Email	2k20csit179@kiot.ac.in [Verify]
Username	2k20csit@kiot.ac.in
Nickname	User16961604242805419206
Title	worker
Company	kiot bank
Department	Sales
Division	
Address	4/104, ammapalayam, umamasapuram .. ParaiKKU , salem- 606308 SALEM 636308 TAMIL NADU
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Locale	English (India)
Language	English
Delegated Approver	Manager
Receive Approval Request Emails	Only if I am an approver
Federation ID	
App Registration: One-Time Password Authenticator	

The Role section shows the user is assigned to the "Salesforce Platform" profile, which includes the "Active" status and "Marketing User" role.

Screenshot of the Gmail inbox showing a welcome email from Salesforce:

Welcome to Salesforce!

Click below to verify your account.

Verify Account

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

Username:
2k20csit@kiot.ac.in

Again, welcome to Salesforce!

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

Change Your Password | Salesforce

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

salesforce

Change Your Password

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

- 8 characters
- 1 letter
- 1 number

* New Password
..... Good

* Confirm New Password
..... Match

Security Question
In what city were you born?

* Answer
india

Change Password

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

Recently Viewed | Bank | Salesforce

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

MECW

mebw Bank customers Home

Bank

Recently Viewed

0 items • Updated a few seconds ago

Bank Name

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

List View

Recently Viewed | customers | S | +

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

MECW

mebw Bank customers Home

Search...

Recently Viewed

0 items • Updated a few seconds ago

customer Name

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

List View

WhatsApp Salesforce Developer Session Top Hits 2023 Permission Sets | Salesforce Welcome to Salesforce! Reset Password | Salesforce

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

Setup Home Object Manager

Q Search Setup

Permission Sets

Help for this Page

Permission Sets

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

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

All Permission Sets | Edit | Delete | Create New View

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

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

1-25 of 29 | 0 Selected | 4 Previous | Next | Page 1 of 2

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

Step 2:

Permission Sets:

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

Object-Level Security:

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

Record-Level Security:

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

Ownership:

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

Organization-Wide Defaults:

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

Testing:

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

The screenshot shows the Salesforce Setup interface with the 'Permission Sets' page open. The left sidebar navigation includes 'User Management Settings' under 'Users', 'Feature Settings', 'Data.com', 'Service', 'Embedded Service', and 'User Interface'. The main content area displays a table of permission sets with columns for 'Action', 'Permission Set Label', 'Description', and 'License'. The table lists various roles such as 'Access_to_activity', 'Buyer', 'Buyer_Manager', 'CRM_User', 'Commerce_Admin', 'Contact_Center_Admin', 'Contact_Center_Agent', 'Contact_Center_Supervisor', 'Experience_Profile_Manager', 'Facility_Manager', 'FieldServiceMobileStandardPermSet', 'Merchandiser', 'Order_Management_Agent', 'Order_Management_Operations_Manager', and 'Order_Management_Shopper'. Each row provides a detailed description of the permissions granted and the license required. The table has a header with letters A through Z and a 'More' link. At the bottom, there are navigation links for 'Previous' and 'Next' pages, and a note indicating 'Page 1 of 2'.

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

Permission Set Create

Enter permission set information

Label:

API Name:

Description:

Session Activation Required:

Select the type of users who will use this permission set

Who will use this permission set?

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

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

License:

Save Cancel

Permission Set Create

Enter permission set information

Label:

API Name:

Description:

Session Activation Required:

Select the type of users who will use this permission set

Who will use this permission set?

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

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

License:

Save Cancel

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

Permission Set Overview:

Setting	Description	Value
API Name	salesmanager	
Namespace Prefix	GQFALS	
Created By	GQFALS	01/10/2023, 7:29 pm

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

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

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

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

Apex Class Access: Permissions to execute Apex classes.

Visualforce Page Access: Permissions to execute Visualforce pages.

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

Flow Access: Permissions to execute Flows.

Object Settings (Detailed View):

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

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

The sidebar navigation includes:

- Setup
- Home
- Object Manager

The main content area shows the 'Permission Sets' page for the 'salesmanager' permission set. The 'Bank' tab is selected. The 'Tab Settings' section shows 'Available' and 'Visible' status. The 'Object Permissions' section lists permissions for the 'Bank' object:

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"/>

Screenshot of the Salesforce Setup interface showing the Permission Sets page for a 'salesmanager' permission set, identical to the one above but with different object permissions selected.

The sidebar navigation includes:

- Setup
- Home
- Object Manager

The main content area shows the 'Permission Sets' page for the 'salesmanager' permission set. The 'Bank' tab is selected. The 'Tab Settings' section shows 'Available' and 'Visible' status. The 'Object Permissions' section lists permissions for the 'Bank' object:

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

Salesforce Developer Session

Permission Sets | Salesforce

Welcome to Salesforce: V

Reset Password | Salesforce

Finish update

Setup Home Object Manager

Search Setup

User

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Service

Embedded Service

Messaging for In-App and Web User Verification

User Interface

Action Link Templates

Actions & Recommendations

App Menu

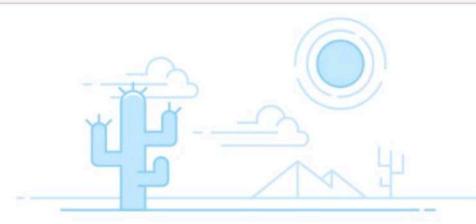
... > SETUP > PERMISSION SET 'SALESMANAGER'

salesmanager

Current Assignments

Add Assignment

No assignments defined.



Salesforce Developer Session

Permission Sets | Salesforce

Welcome to Salesforce: V

Reset Password | Salesforce

Finish update

Setup Home Object Manager

Search Setup

User

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Service

Embedded Service

Messaging for In-App and Web User Verification

User Interface

Action Link Templates

Actions & Recommendations

App Menu

SELECT USERS TO ASSIGN

All Users

1 item selected

Search this list...

Full Name ↑	All... ↓	Username	Role	Ac... ↓	Profile
Amelia Ellington	aelli	amelia.ellington.146kxcp9oodih.d6cwpdcuo4wh.bnbdwmvwhhq.wguctpr1dalv@gmail.com	<input checked="" type="checkbox"/>	Force.com - App Subscription User	Force.com - App Subscription User
Chatter Expert	Chatty	chatty.00d5j00000bc5kkkeab.lo0bfwmpqke@chatter.salesforce.com	<input checked="" type="checkbox"/>	Chatter Free User	Chatter Free User
Diya Adanna	dadan	test_dyaa_pas_4w8bjybi9wik.tszgrgsbkpx3.3gi8lofvzws.h47bkzw6mea@gmail.com	<input checked="" type="checkbox"/>	UAMS User	UAMS User
GOPAL S	GS	kiot520@gmail.com	<input checked="" type="checkbox"/>	System Administrator	System Administrator
Integration User	integ	integration@00d5j00000bc5kkkeab.com	<input checked="" type="checkbox"/>	Analytics Cloud Integration User	Analytics Cloud Integration User
madhu b	mb	2k20csit@kiot.ac.in	<input checked="" type="checkbox"/>	salesmanager	salesmanager
Security User	sec	insightssecurity@00d5j00000bc5kkkeab.com	<input checked="" type="checkbox"/>	Analytics Cloud Security User	Analytics Cloud Security User
sowmiya bala	sbala	2k21it@kiot.ac.in	<input checked="" type="checkbox"/>	Manager	Manager

Cancel Next

Salesforce Developer Session

Permission Sets | Salesforce

Welcome to Salesforce: View

Reset Password | Salesforce

Finish update

Setup Home Object Manager

Search Setup

Select an Expiration Option For Assigned Users

No expiration date

Specify the expiration date

1 Day 1 Week 30 Days 60 Days Custom Date

Time Zone Select a time zone...

Selected Users

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

C Cancel Back Assign

PERMISSION SET 'SALESMANAGER' 1 assignments were successful.

Assignment Summary

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

Done

Salesforce Developer Session

Permission Sets | Salesforce

Welcome to Salesforce: View

Reset Password | Salesforce

Finish update

Setup Home Object Manager

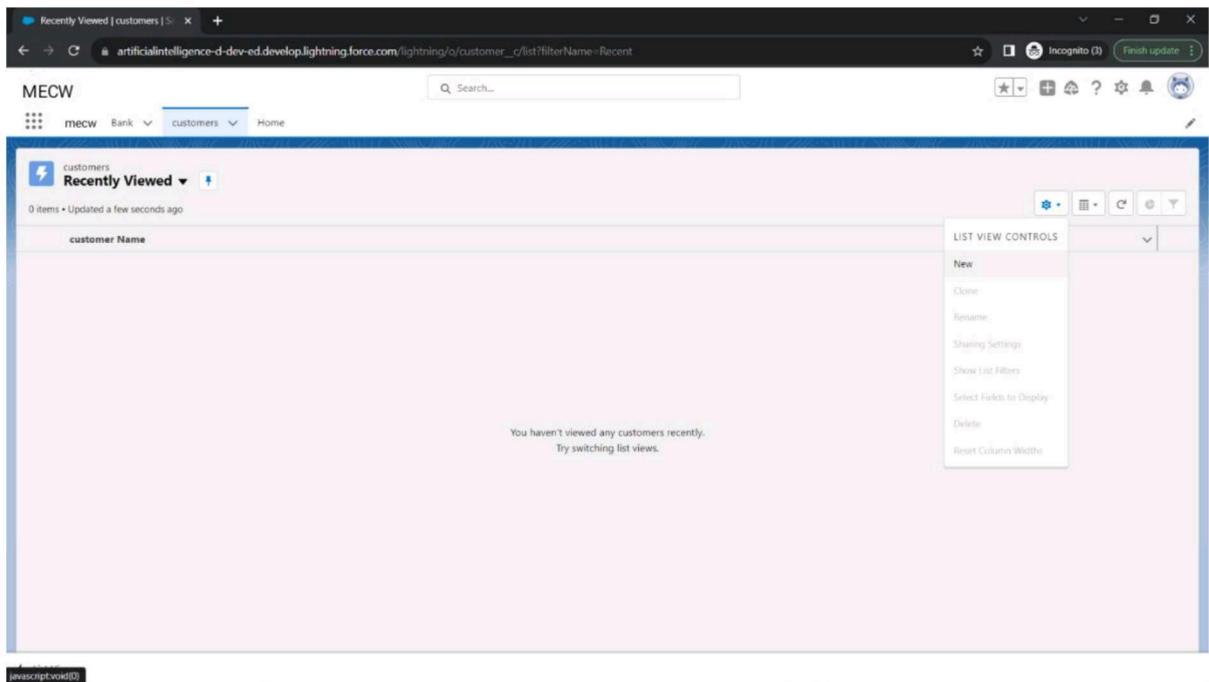
Search Setup

PERMISSION SET 'SALESMANAGER' 1 assignments were successful.

Assignment Summary

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

Done



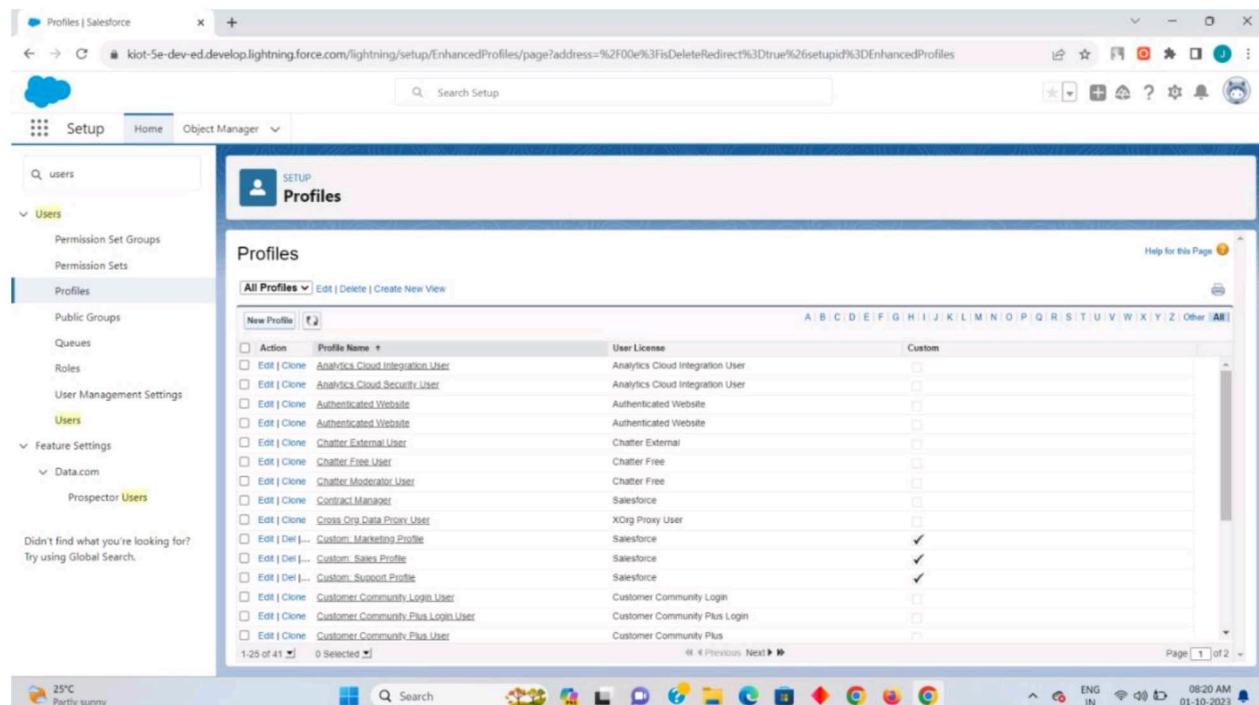
javascript:void(0)

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

Solution:

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

Setup-quick search[profile]

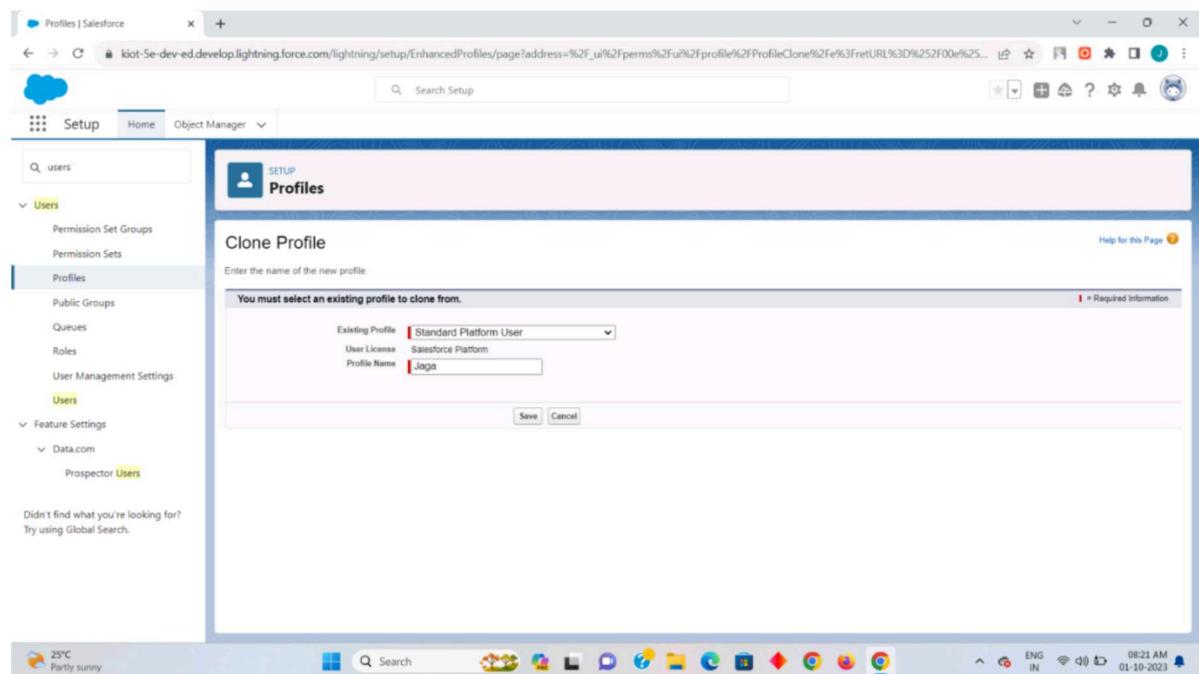


The screenshot shows the Salesforce Setup interface with the following details:

- Page Header:** Profiles | Salesforce
- Search Bar:** Search Setup
- Left Navigation:** Setup, Home, Object Manager, Users (selected), Profiles, Public Groups, Queues, Roles, User Management Settings, Feature Settings, Data.com, Prospector.
- Central Content:** **Profiles** page. The title bar includes "SETUP" and "Profiles". Below it is a "Profiles" section with "All Profiles" dropdown, "Edit | Delete | Create New View" buttons, and a "Help for this Page" link.
- Table:** A list of profiles with columns: Action, Profile Name, User License, and Custom. Some profiles have checkboxes next to them. Examples include:
 - Analytics Cloud Integration User (User License: Analytics Cloud Integration User)
 - Authenticated Website (User License: Authenticated Website)
 - Chatter External (User License: Chatter External)
 - Chatter Free (User License: Chatter Free)
 - Chatter Moderator (User License: Chatter Moderator)
 - Contract Manager (User License: Salesforce)
 - Cross Org Data Proxy (User License: XOrg Proxy User)
 - Custom Marketing Profile (User License: Salesforce)
 - Custom Sales Profile (User License: Salesforce)
 - Custom Support Profile (User License: Salesforce)
 - Customer Community Login (User License: Customer Community Login)
 - Customer Community Plus Login (User License: Customer Community Plus Login)
 - Customer Community Plus (User License: Customer Community Plus)
- Bottom:** Page navigation (Previous, Next), Page 1 of 2, and system status icons (25°C, Partly sunny, ENG IN, 08:20 AM, 01-10-2023).

Step 2:

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



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

Step 3:

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

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

- Page Title:** Profiles | Salesforce
- Section:** Profiles
- Profile Name:** Jaga
- User License:** Salesforce Platform
- Description:** (empty)
- Created By:** Jagadeesh S. (01/10/2023, 8:21 am)
- Modified By:** Jagadeesh S. (01/10/2023, 8:21 am)
- Custom Profile:**
- Page Layouts:** Standard Object Layouts (Global, Email Application, Home Page Layout, Account, Alternative Payment Method, Appointment Invitation) and Operating Hours (Global, Order, Order Product, Payment, Payment Authorization).
- Permissions:** A list of permissions is shown at the top of the page, including Login, Enabled Apex Class Access, Enabled Visualforce Page Access, Enabled External Data Source Access, Enabled Named Credential Access, Enabled External Credential Principal Access, Enabled Custom Metadata Type Access, Enabled Custom Setting Definitions Access, Enabled Flow Access, Enabled Service Pipeline Status Access, and Enabled Custom Permissions.

Profiles | Salesforce

kiot-5e-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j00000WQ2O%2Fe%3freURL%3D%252f00e5j00000WQ2O%253fsetupid...

Setup Home Object Manager

Search Setup

Users

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

Custom Object Permissions

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

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.
- Relax login IP restrictions.
- Skip employee device activation during Experience Cloud site login.

Session Security Level Required at Login: None

25°C Partly sunny

Search

ENG IN 08:21 AM 01-10-2023

Profiles | Salesforce

kiot-5e-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j00000WQ2O%2Fe%3freURL%3D%252f00e5j00000WQ2O%253fsetupid...

Setup Home Object Manager

Search Setup

Users

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

Custom Object Permissions

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

Session Settings

Session Times Out After: 2 hours of inactivity

Enable different Experience Cloud login policies for employees:

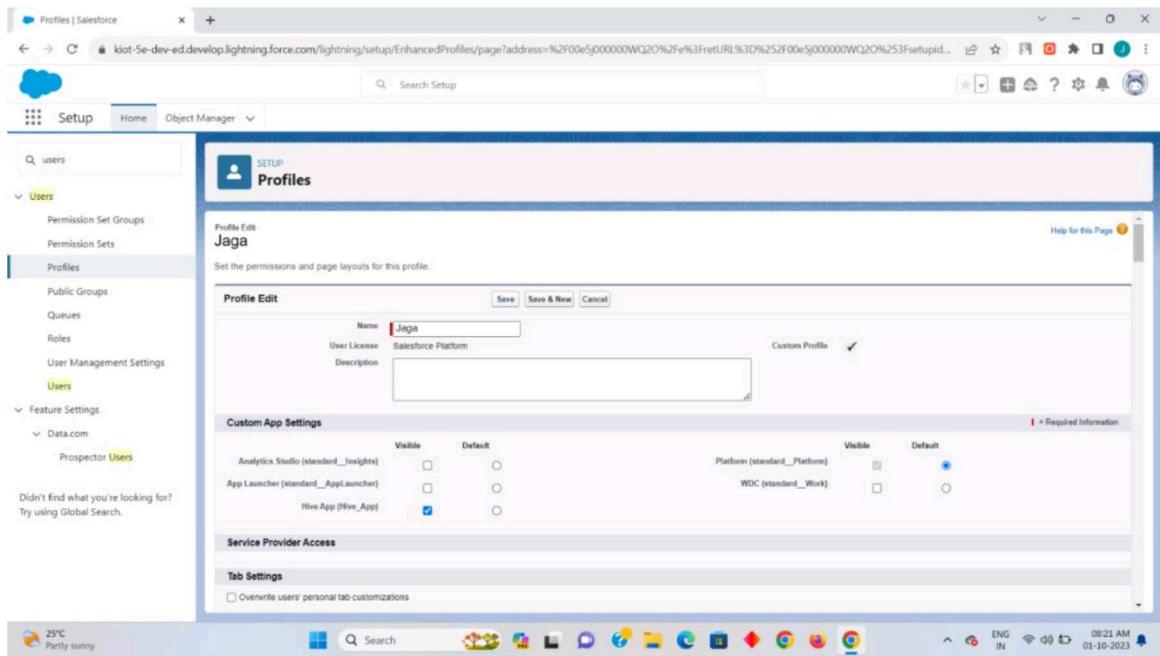
- Separate Experience Cloud site and Salesforce login authentication for employees.
- Relax login IP restrictions.
- Skip employee device activation during Experience Cloud site login.

Session Security Level Required at Login: None

25°C Partly sunny

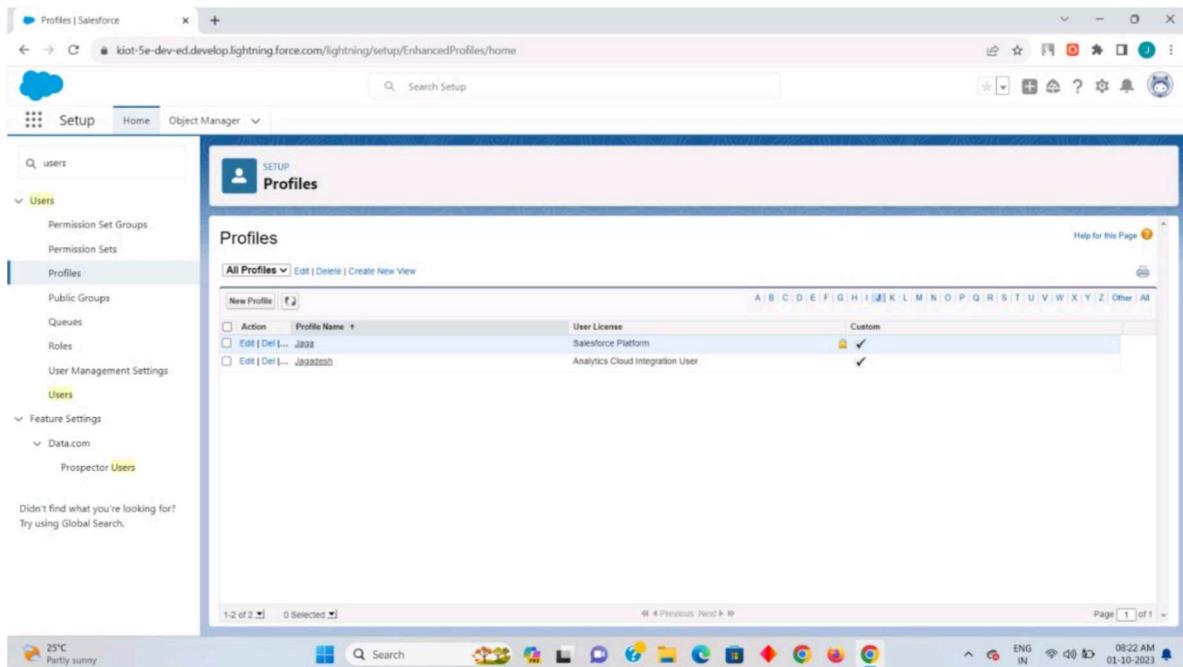
Search

ENG IN 08:21 AM 01-10-2023



Step 4

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



Step 5:

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

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

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Chatter_Expert	Chatter	chatty.005f00000cBjoseaf6z@berkend4@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	Grey_Jane	jgrey	jane_grey_hygnimpoam.c27d2kog0t3@gmail.com		<input checked="" type="checkbox"/>	Customer Community User
<input type="checkbox"/>	S.Jaga	JS	jaga256@gmail.com	CEO	<input type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	S.Jagadeesh	JS	js0w@gmail.com	SF Admin	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	S.Jagadeesh	JS	jaga1117@gmail.com	Channel Sales Team	<input type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	User_Integration	Integ	integration@005f00000cBjoseaf.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	User_Security	sec	insightssecurity@005f00000cBjoseaf.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

Users | Salesforce

Setup Home Object Manager

Q Search Setup

Users

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

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

25°C Partly sunny

New User

User Edit Save Save & New Cancel

General Information

First Name	Jagadesh11
Last Name	S
Alias	J
Email	javer123@gmail.com
Username	javer123@gmail.com
Nickname	User16961287514496296
Title	
Company	
Department	
Division	

Role Director, Channel Sales

User License Salesforce Platform

Profile **Jaga**

Active

Marketing User Standard Platform User

Office User

Knowledge User

Flow User

Service Cloud User

Site.com Contributor User

Site.com Publisher User

WDC User

Data.com User Type **None**

Data.com Monthly Addition Limit Default Limit (300)

Accessibility Mode (Classic Only)

High-Contrast Palette on Charts

Help for this Page

08:23 AM 01-10-2023

Users | Salesforce

Setup Home Object Manager

Q Search Setup

Users

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

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

25°C Partly sunny

New User

User Edit Save Save & New Cancel

General Information

First Name	Jagadesh22
Last Name	S
Alias	J
Email	javer1@gmail.com
Username	javer1@gmail.com
Nickname	User16961287993618745
Title	
Company	
Department	
Division	

Role Marketing Team

User License Salesforce Platform

Profile **Jaga**

Active

Marketing User Standard Platform User

Office User

Knowledge User

Flow User

Service Cloud User

Site.com Contributor User

Site.com Publisher User

WDC User

Data.com User Type **None**

Data.com Monthly Addition Limit Default Limit (300)

Accessibility Mode (Classic Only)

High-Contrast Palette on Charts

Help for this Page

08:23 AM 01-10-2023

Users | Salesforce

Setup Home Object Manager

Q Search Setup

Users

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

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

25°C Partly sunny

All Users

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

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

View: All Users Edit | Create New View

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Ent S Jaga	jl	javer00@gmail.com	CEO	<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	Ent S Jagadeesh	jl	w0r@gmail.com	SP Admin	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Ent S Jagadeesh	jl	javer117@gmail.com	Channel Sales Team	<input type="checkbox"/>	Standard Platform User
<input checked="" type="checkbox"/>	Ent S Jagadeesh11	jl	javer123@gmail.com	Director, Channel Sales	<input checked="" type="checkbox"/>	Jaga
<input checked="" type="checkbox"/>	Ent S Jagadeesh22	jl	javer1@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Jaga

New User Reset Password(s) Add Multiple Users

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

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

Help for this Page

08:24 AM 01-10-2023

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

Step 6:

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

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

Permission Sets | Salesforce

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

Setup Home Object Manager

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

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

SETUP Permission Sets

Help for this Page

Permission Sets

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

All Permission Sets | Edit | Delete | Create New View

New

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

1-25 of 30 0 Selected

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

Page 1 of 2

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

25°C Partly sunny

Q Search

ENG IN 06:24 AM 01-10-2023

Permission Sets | Salesforce

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

Setup Home Object Manager

Users

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Prospector Users

Did you find what you're looking for?
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SETUP Permission Sets

Help for this Page

Permission Set Create

Enter permission set information

Label: permission12

API Name: permission12

Description:

Session Activation Required:

Select the type of users who will use this permission set

Who will use this permission set?

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

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

License: -None-

Save Cancel

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

25°C Partly sunny

Q Search

ENG IN 06:24 AM 01-10-2023

Permission Sets | Salesforce

kiot-5e-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2FOPSSj000008Pgta%3fsfdclframeOrigin%3Dhttps%253A%252F%252Fkiot-5e-dev-ed.devel...

Setup Home Object Manager

Q Search Setup

Users

Permission Set Groups

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

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

Video Tutorial | Help for this Page

Permission Set Overview

Description	License
Session Activation Required	<input type="checkbox"/>
Last Modified By	Janadeesh.S. 01/10/2023, 8:24 am

Apps

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

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

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

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

Apex Class Access
Permissions to execute Apex classes

Visualforce Page Access
Permissions to execute Visualforce pages

External Data Source Access

ENG IN 08:24 AM 01-10-2023

Permission Sets | Salesforce

kiot-5e-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2FOPSSj000008Pgta%3fsfdclframeOrigin%3Dhttps%253A%252F%252Fkiot-5e-dev-ed.devel...

Setup Home Object Manager

Q Search Setup

Users

Permission Set Groups

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

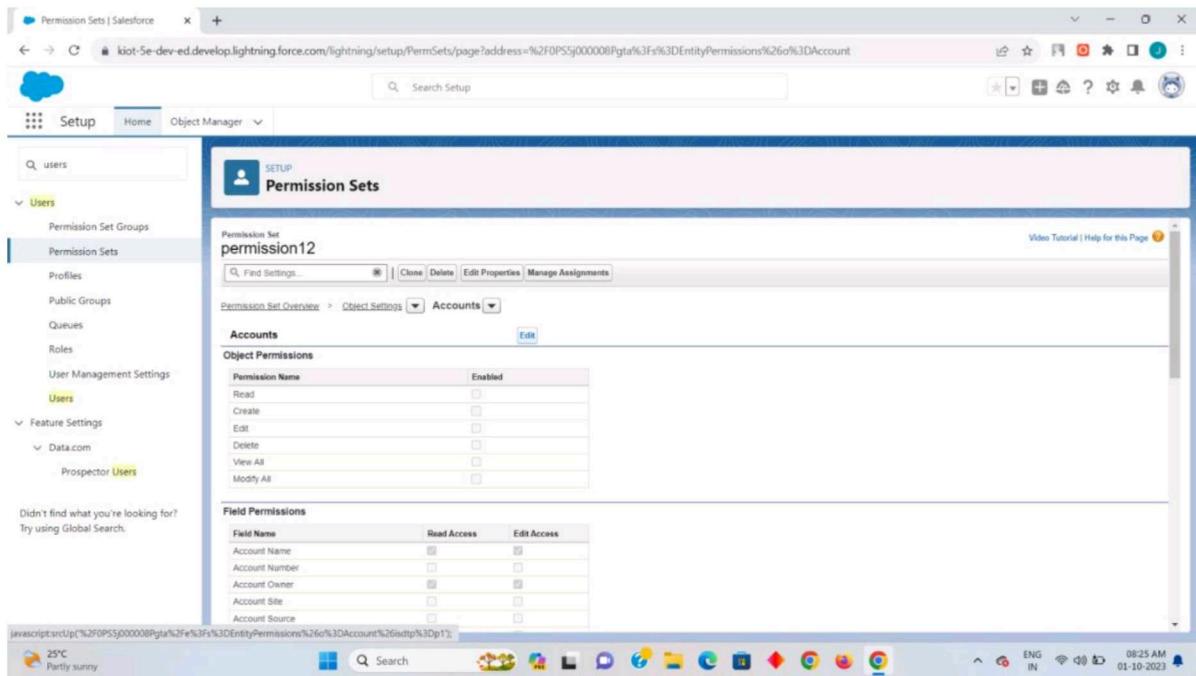
Didn't find what you're looking for?
Try using Global Search.

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Object Settings

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

ENG IN 08:25 AM 01-10-2023



Step 7:

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

Permission Sets | Salesforce

Setup Home Object Manager

Search Setup

Users

Permission Set Groups

Permission Sets

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Prospector Users

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Permission Sets | Salesforce

Setup Home Object Manager

Search Setup

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Prospector Users

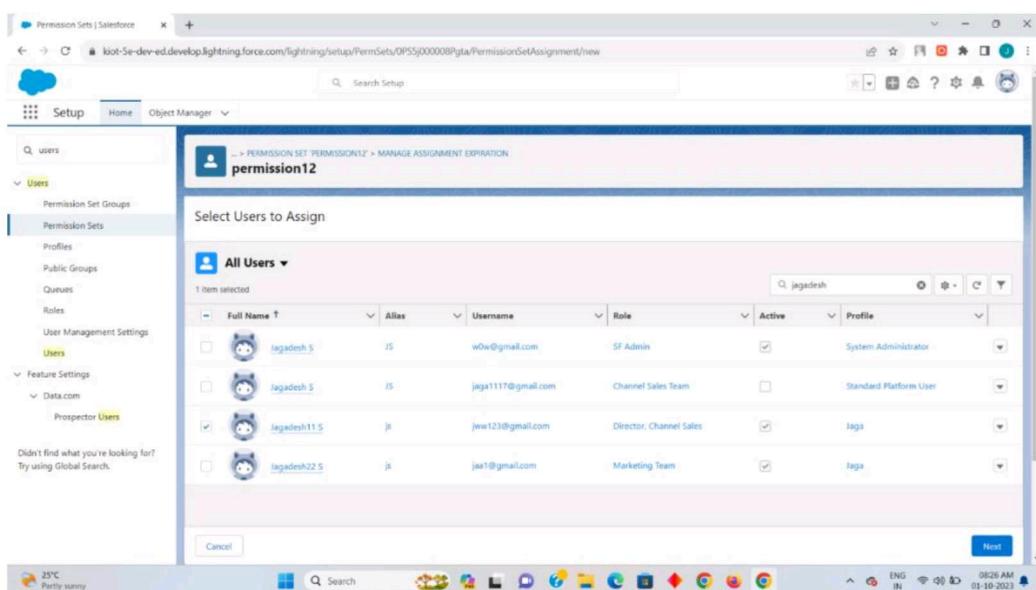
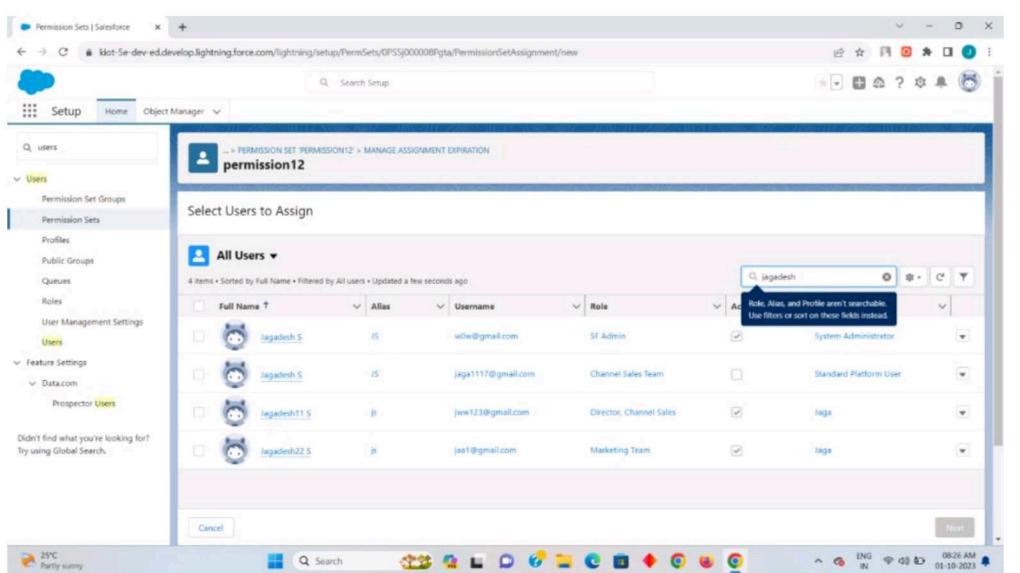
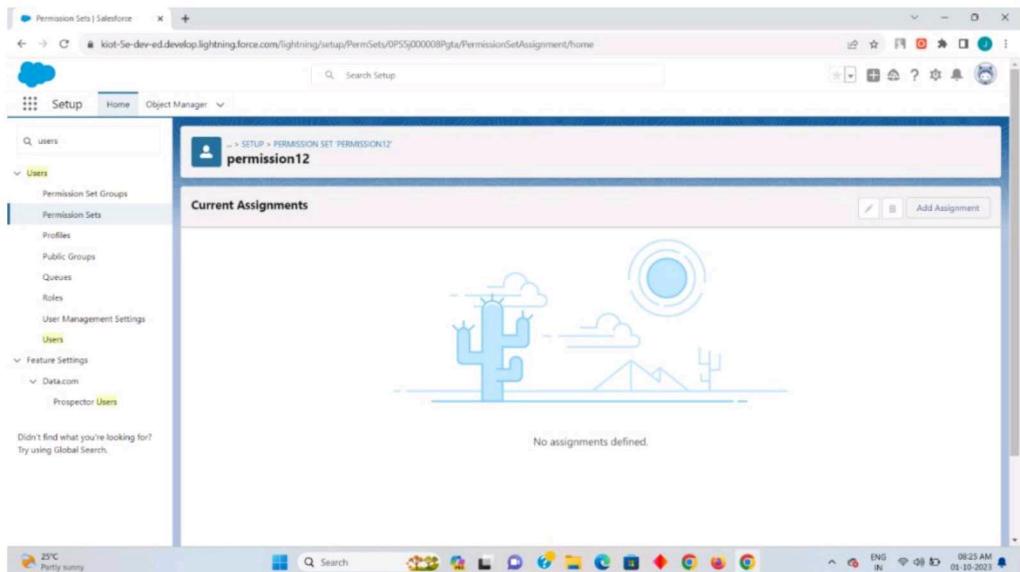
Didn't find what you're looking for? Try using Global Search.

25°C Partly sunny

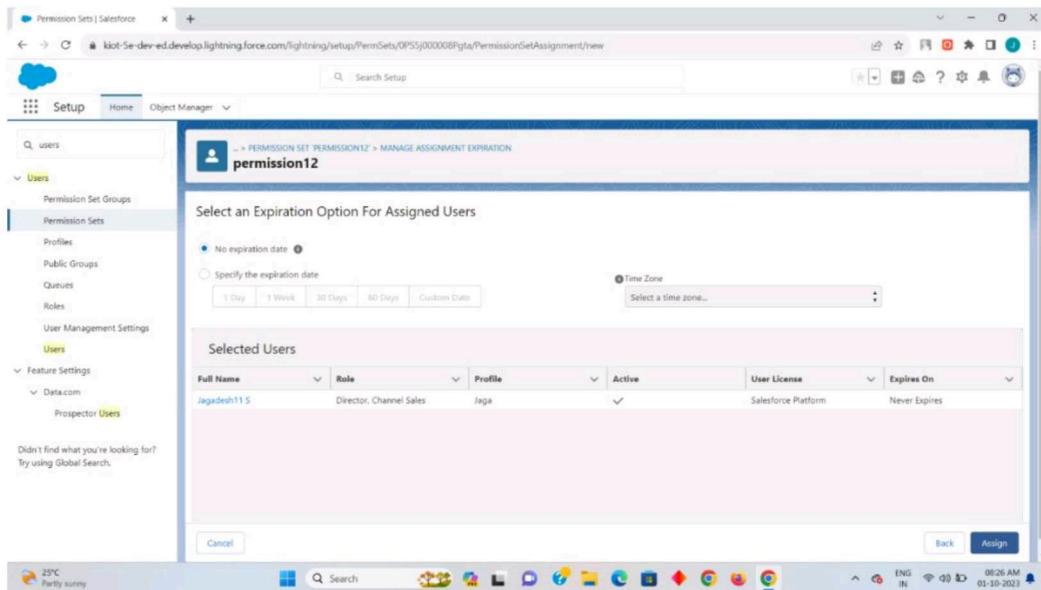
https://kiot-5e-dev-ed.my.salesforce.com/one/one.app#/allohredirect/0P5j00000Bpgta/e?h=EntityPermissions&o=Account&sidtp=p1

Step 8

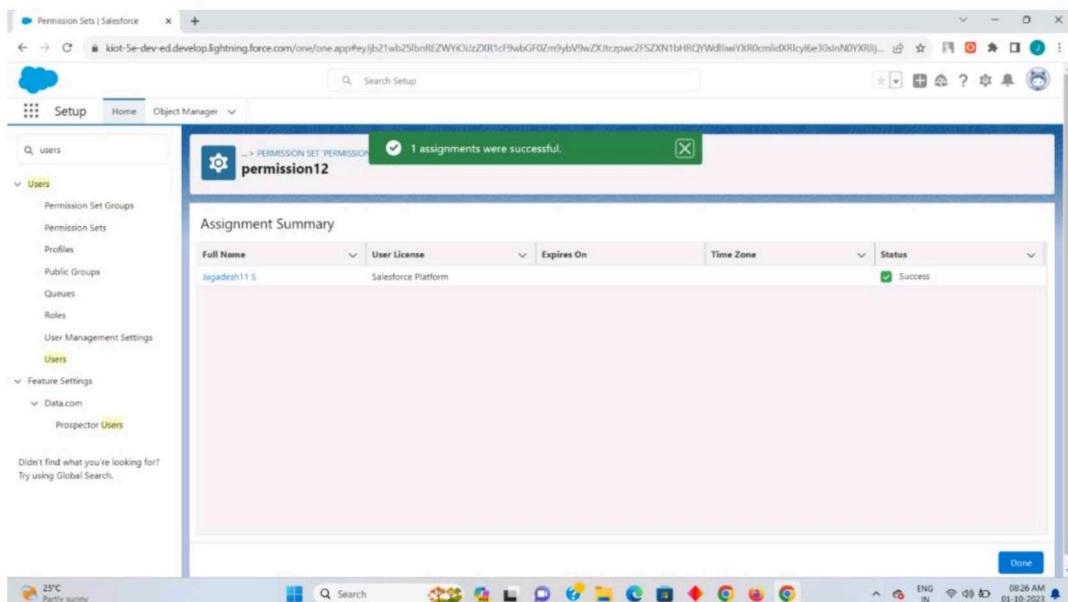
Now click on add assignment there you will find your two created users click on any one user to give a special access as delete on it and then click on assign so that the specific selected user can have a special access as delete on it.



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**.

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

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

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

Email Template
Thank You Email - Survey

Edit in Builder Edit Clone ▾

Details Related

Information

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

Message Content

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

Additional Information

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

Step 3: Create an Email Alert

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

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

Survey - Thank You Email

Description: Survey - Thank You Email

Unique Name: Survey_Thank_You_Email

Object: Survey Result

Email Template: Thank You Email - Survey

Recipient Type: User

Available Recipients:

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

Selected Recipients:

- Email Field: Email

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

Additional Emails:

From Email Address: Current User's email address

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

Save | Save & New | Cancel

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

- 1. Click Setup.**

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

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

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

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

Edit Create Records

Create Salesforce records using values from the flow.

* Label: Save Response * API Name: Save_Response

Description:

How Many Records to Create:
 One
 Multiple

How to Set the Record Fields:

 Use all values from a record

 Use separate resources, and literal values

Create a Record of This Object:
 * Object: Survey Result

Set Field Values for the Survey Result

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

+ Add Field

Manually assign variables

Cancel Done

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

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

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

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

5. Click Done.

Edit "Survey - Thank You Email" email alert

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

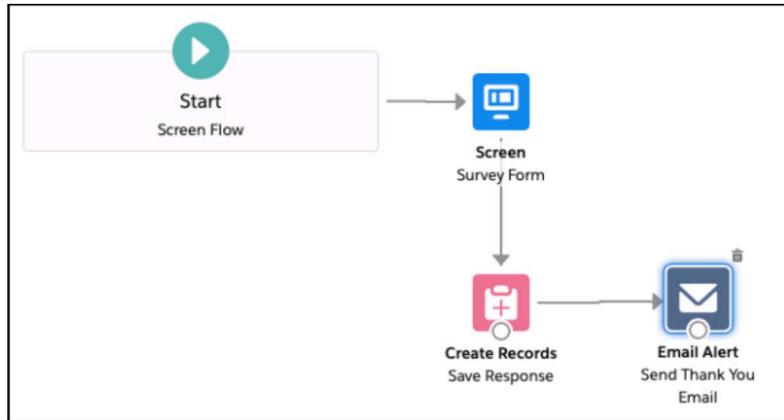
*Label	*API Name
Send Thank You Email	Send_Thank_You_Email
Description	

Set Input Values

A_a * Record ID
{!Save_Response}

Cancel Done

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



1. Click Save.

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

3. Click Show Advanced.

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

5. Type: Screen Flow

6. API Version for Running the Flow: 51

7. Interview Label: Survey

{!\$Flow.CurrentDateTime}

8. Click Save.

Save as

A New Version A New Flow

* Flow Label * Flow API Name

Survey Survey

Description

Hide Advanced

How to Run the Flow i

User or System Context—Depends on How Flow is Launched

* Type

Screen Flow

* API Version for Running the Flow

51

Interview Label i

Insert a resource... 🔍

Survey {!\$Flow.CurrentDateTime}

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

Status: Active

Type: Screen Flow

Version Number: 2

Cancel Save

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

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

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

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

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

- Toolbar:** File, Edit, Debug, Test, Workspace, Help.
- Project Bar:** VFPageToLC.app *
- Code Editor:** Displays the following Apex code:

```
1 <aura:application access="global"
2         extends="ltng:outApp"
3         implements="ltng:allowGuestAccess">
4             <aura:dependency resource="lightning:flow"/>
5         </aura:application>
```
- Logs, Tests, and Problems:** A blue bar at the bottom of the editor.

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

```
1<apex:page showheader="false" lightningStylesheets="true">
2<html>
3    <head>
4        <apex:includeLightning />
5        <!--Use apex:includeLightning to add the Lightning Components for Visualforce JavaScript library to your Visualf
6    </head>
7    <body class="slds-scope">
8        <div id="flowContainer" />
9        <script>
10       var statusChange = function (event) {
11           if(event.getParam("status") === "FINISHED") {
12               var outputVariables = event.getParam("outputVariables");
13               var key;
14               for(key in outputVariables) {
15                   if(outputVariables[key].name === "myOutput") {
16                       ...
17                   }
18               }
19           }
20       };
21       $Lightning.use("c:VFFPageToLC", function() {
22           $Lightning.createComponent("lightning:flow", {"onstatuschange":statusChange},
23             "flowContainer"
24             function (component) {
25                 component.startFlow("Survey", );
26             }
27         );
28     });
29     </script>
30 </body>
```

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

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

1. Click **Setup**.

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

Site Edit

Save **Cancel**

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

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

Proof of Concept

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

Survey

Name

First Name
Alok

Last Name
Sinfal

*Email
[REDACTED]

*Rating
5

*Comment
Awesome Blog 

Next

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

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

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

Hi Alok Sinfal,

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

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

Thanks,
Automation Champion