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Salesforce Developer(Course)  
Assignment no 1

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Zone no : Zone 8

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

Solution:

### Step 1: Create Custom Objects

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

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

- Header:** Includes the Salesforce logo, a search bar labeled "Search Setup", and various navigation icons.
- Breadcrumbs:** "Setup" > "Object Manager" > "New Custom Object".
- Title Bar:** "SETUP" and "New Custom Object".
- Content Area:**
  - Custom Object Definition Edit:** Subtitle "Custom Object Information".
  - Object Name:** "college" (Label), "colleges" (Plural Label), "Starts with vowel sound":  (disabled).
  - Object Name via API:** "Object Name": "college", "Example: Account".
  - Description:** A large text area with placeholder text "Description".
  - Context-Sensitive Help Setting:** Radio buttons for "Open the standard Salesforce.com Help & Training window" (selected) and "Open a window using a Visualforce page".
  - Content Name:** "Content Name": "None".
  - Record Name Label and Format:** Subtitle "Enter Record Name Label and Format". Note: "The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.".
    - Record Name:** "college Name" (Label), "Example: Account Name".
    - Data Type:** "Text".
  - Optional Features:** Checkboxes for "Allow Reports", "Allow Activities", "Track Field History", "Allow in Chatter Groups", and "Enable Licensing".
  - Object Classification:** Subtitle "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:** Radio buttons for "In Development" and "Deployed" (selected). Note: "What is this?".
  - Search Status:** Subtitle "When this setting is enabled, your users can find records of this object type when they search. Learn more.".
    - Allow Search:**
  - Object Creation Options (Available only when custom object is first created):**
    - Add Notes and Attachments related list to default page layout.
    - Launch New Custom Tab Wizard after saving this custom object.
- Buttons:** "Save", "Save & New", and "Cancel".

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

The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. The main title is 'New Custom Object'. A message bar at the top indicates that permissions for the object are disabled by default. The 'Custom Object Definition Edit' section contains fields for 'Label' (set to 'department') and 'Plural Label' (set to 'departments'). There is also a checkbox for 'Starts with vowel sound'. The 'Object Name' field is set to 'department' with an example of 'Account'. A 'Description' text area is present. 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 'Record Name' field set to 'Department Name' with an example of 'Account Name' and a 'Data Type' dropdown set to 'Text'. The 'Optional Features' section contains several checkboxes for enterprise features like reports, activities, and licensing, all of which are unchecked. The 'Object Classification' section shows three checked checkboxes: 'Allow Sharing', 'Allow Bulk API Access', and 'Allow Streaming API Access'. The 'Deployment Status' section has a radio button for 'Deployed' selected. The 'Search Status' section has an unchecked checkbox for 'Allow Search'. The 'Object Creation Options' section has two checkboxes: 'Add Notes and Attachments related list to default page layout' and 'Launch New Custom Tab Wizard after saving this custom object', both of which are unchecked. 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 | Home | Object Manager

SETUP > OBJECT MANAGER  
**CDepartment**

**Details**

**Fields & Relationships**

Description

API Name  
CDepartment\_\_c

Custom  
✓  
Singular Label  
CDepartment

Plural Label  
CDepartments

Enable Reports

Track Activities

Track Field History

Deployment Status  
Deployed

Help Settings

Standard salesforce.com Help Window

**Edit | Delete**

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

Setup | Home | Object Manager

SETUP > OBJECT MANAGER  
**CDepartment**

**Details**

**Fields & Relationships**

New Relationship

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

Field Label: college

Field Name: college

Description:

Help Text:

Child Relationship Name: CDepartments

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

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

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

Help for this Page

Step 3 of 6

Previous | Next | Cancel

Lookup Filter

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

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

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

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

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

The screenshot shows the Salesforce Object Manager interface for the 'CDepartment' object. The 'Fields & Relationships' tab is selected. A table lists the following fields:

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

The screenshot shows the Salesforce Setup interface under the 'Tabs' section. The left sidebar includes 'User Interface' and 'Rename Tabs and Labels'. The main content area is titled 'Custom Tabs' and contains sections for 'Custom Object Tabs', 'Web Tabs', 'Visualforce Tabs', 'Lightning Component Tabs', and 'Lightning Page Tabs'. Each section has a 'New' button and a 'What Is This?' link. 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	

The screenshot shows the Salesforce Setup interface under the 'Object Manager' section for the 'college' object. The left sidebar lists various settings like 'Page Layouts', 'Buttons, Links, and Actions', and 'Validation Rules'. The main content area is titled 'New Custom Field' and is on 'Step 5. Add to page layouts'. It shows a table with field details and a checkbox for adding the field to specific page layouts. A note at the bottom says to click 'Save & New' to create more fields or 'Save' if done.

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

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

To change the location of this field on the page, you will need to customize the page layout.

Add Field  Page Layout Name  
 college Layout

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

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	Field Name	Visible	Read Only
Total count	Total_count	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
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. The "Field to Aggregate" dropdown is set to "None". 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.
  - 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.
- Master-Detail Relationship Creates a relationship type for parent-child relationships between this object (the child, or "detail") and another object (the parent, or "master") where:
  - The relationship field is required on all detail records.
  - The ownership and sharing of a detail record are determined by the master record.
  - When 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.
- True/False Allows users to select a True (checked) or False (unchecked) value.

Next Cancel

The screenshot shows the Salesforce Object Manager interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager'. A search bar contains the text 'college'. On the right side of the header are various icons for account management. Below the header, the page title is 'college'. The main content area has a sidebar on the left with links like 'Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', etc. The main panel is titled 'Fields & Relationships' and shows a table with four items. The table columns are 'FIELD LABEL', 'FIELD NAME', 'DATA TYPE', 'CONTROLLING FIELD', and 'INDEXED'. The data is as follows:

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

## Step 4: Create a Lightning App

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

## 10. Assign the app to users or profiles.

## 11. Test the app with the assigned users.

The screenshot shows the Salesforce Setup interface with the 'Tabs' 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 status message 'Step 2 of 3'.

**Step 2: Add to Profiles**

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

Help for this Page [?](#)

Previous Next Cancel

The screenshot shows the Salesforce Setup interface with the 'Tabs' tab selected. The main content area is titled 'New Custom Object Tab' and is divided into three steps. Step 1, 'Enter the Details', is currently active. It allows users to choose a custom object ('Object' dropdown set to 'college') and a tab style ('Tab Style' dropdown set to 'Jewel'). There is also a field for a 'Splash Page Custom Link' which is currently set to 'None'. Step 2, 'Customize the Tab', is visible below it. Step 3, 'Add to Custom Apps', is shown at the bottom. A sidebar on the left lists 'User Interface' components, including 'Rename Tabs and Labels'.

The screenshot shows the 'Step 3. Add to Custom Apps' page. It lists various standard and custom apps available for adding to the new tab. Each app has a checkbox labeled 'Include Tab' to its right. Most checkboxes are checked. At the bottom of the list is a checkbox for 'Append tab to users' existing personal customizations'. Navigation buttons 'Previous', 'Save', and 'Cancel' are located at the bottom right.

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 of 3

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

Object	CDepartment
Tab Style	Lightning

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

Splash Page Custom Link: [None](#)

Description:

Next Cancel

**Lightning Experience App Manager**

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

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

New Lightning App | New Connected App

Salesforce Setup Home Object Manager

Search Setup

User Interface

Rename Tabs and Labels

Tabs

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

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.

Help for this Page

Custom Object Tabs

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

Web Tabs

No Web Tabs have been defined.

Visualforce Tabs

No Visualforce Tabs have been defined.

Lightning Component Tabs

No Lightning component tabs have been defined.

Lightning Page Tabs

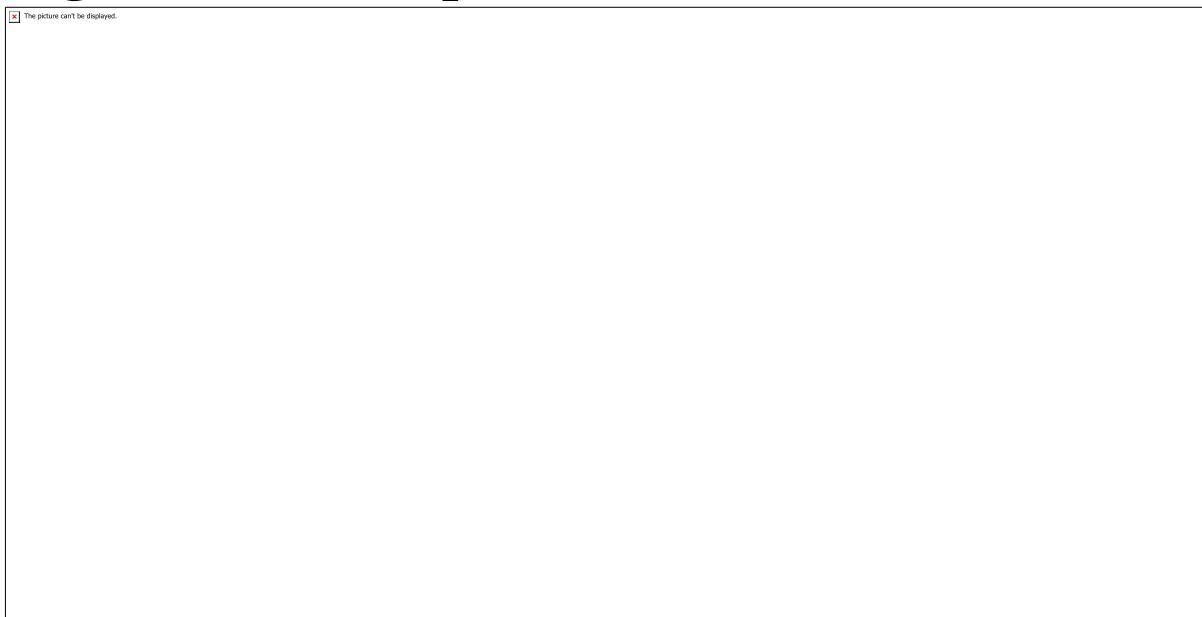
No Lightning Page Tabs have been defined.

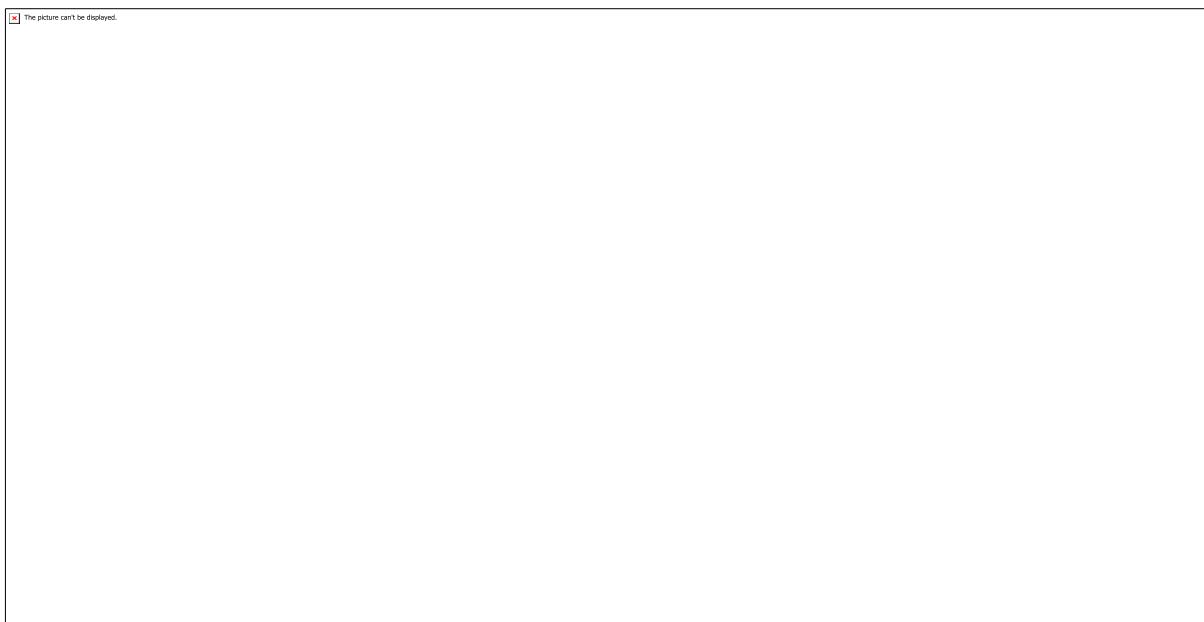
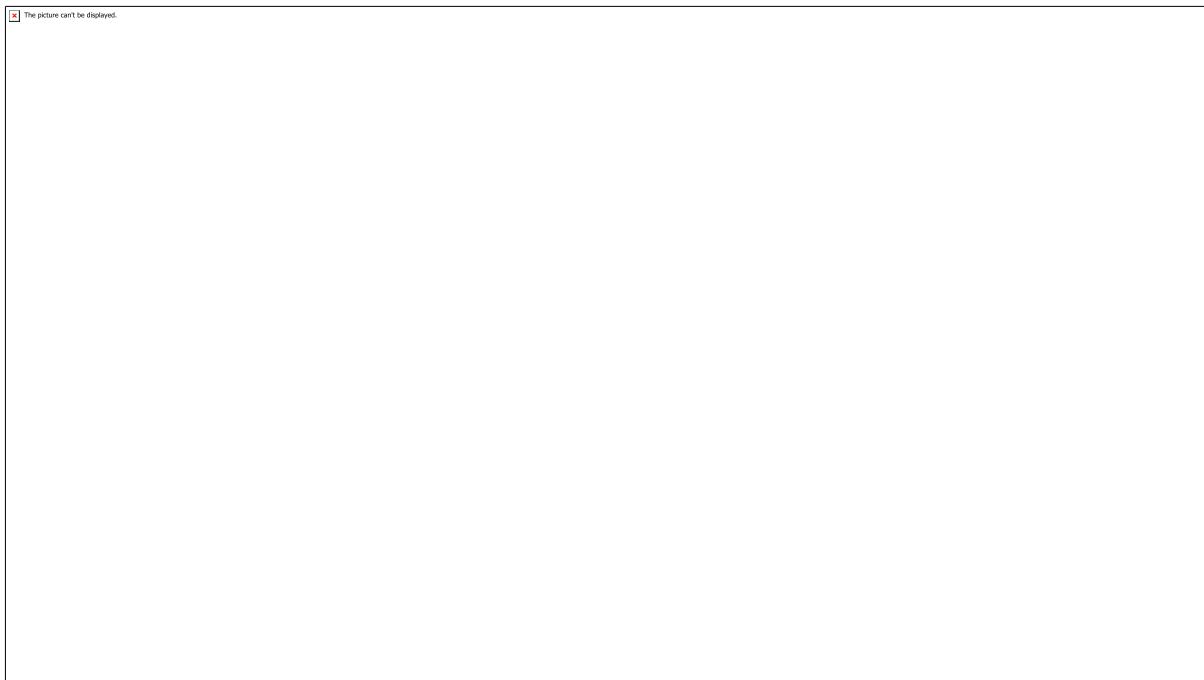
The picture can't be displayed.

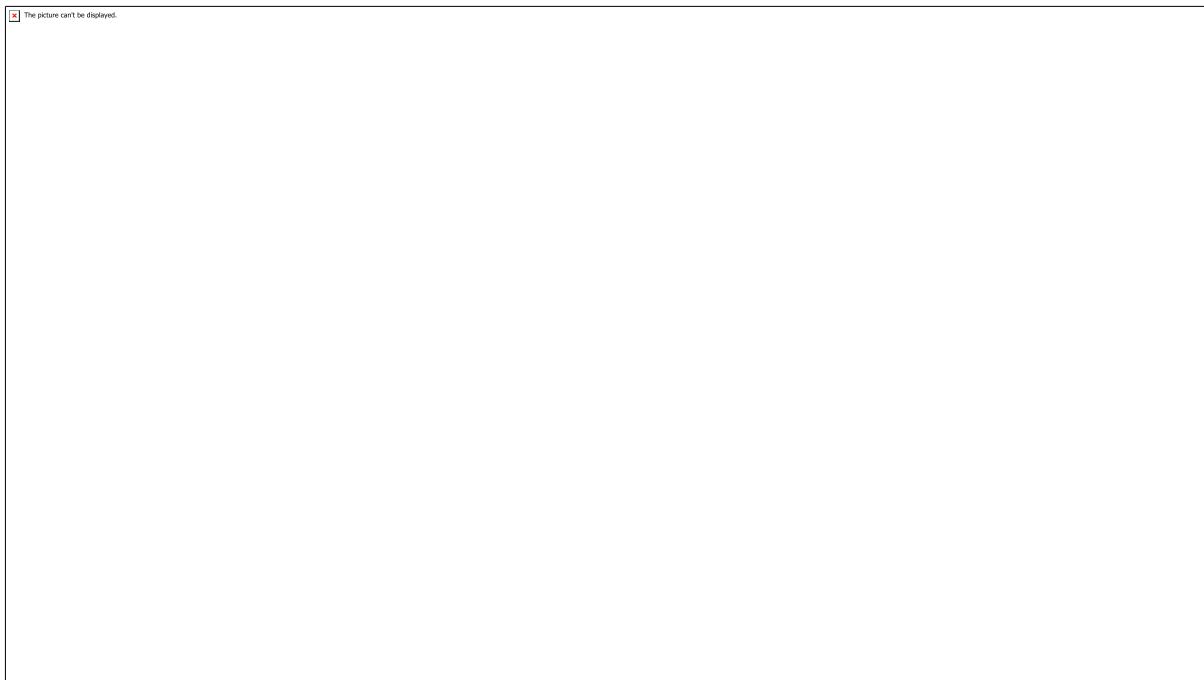
## **Conclusion:**

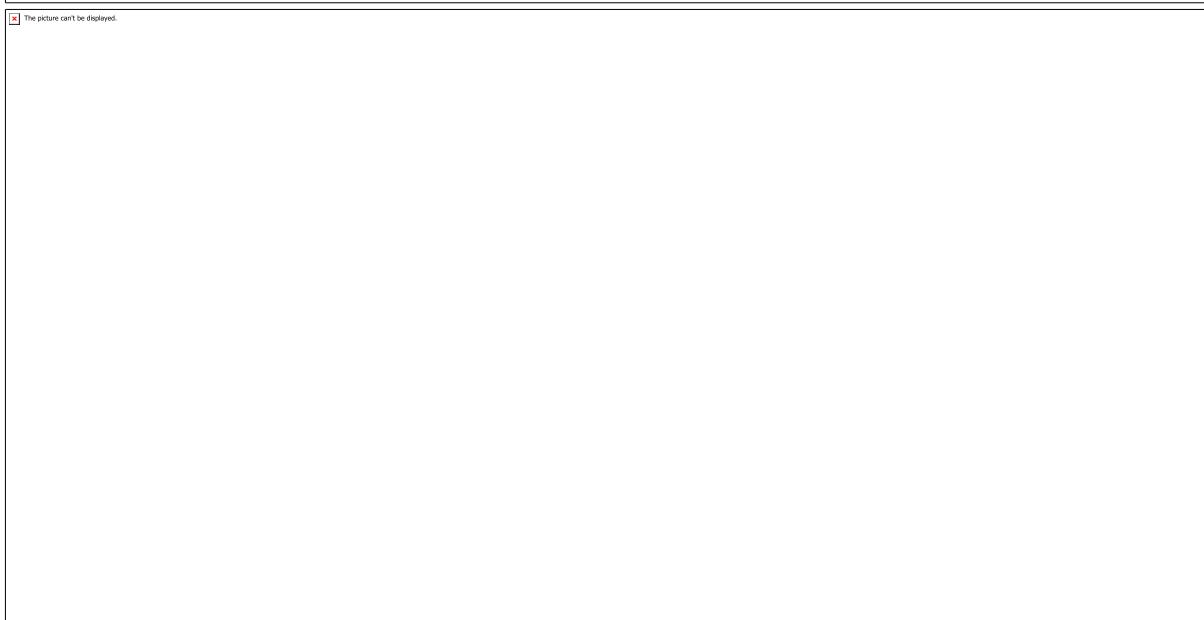
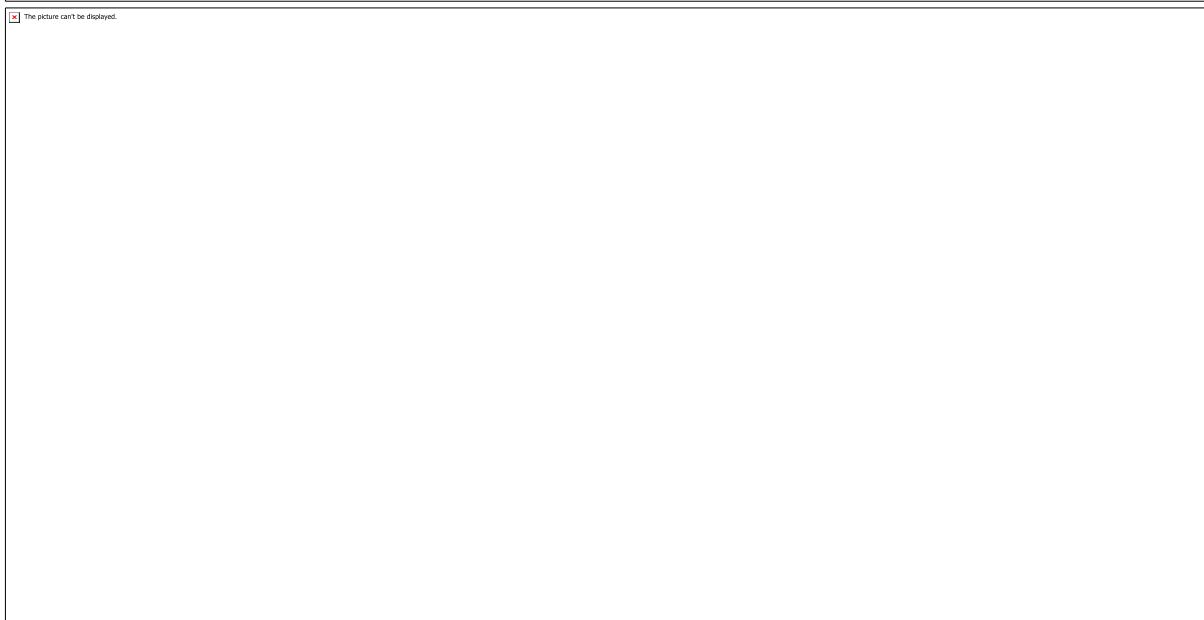
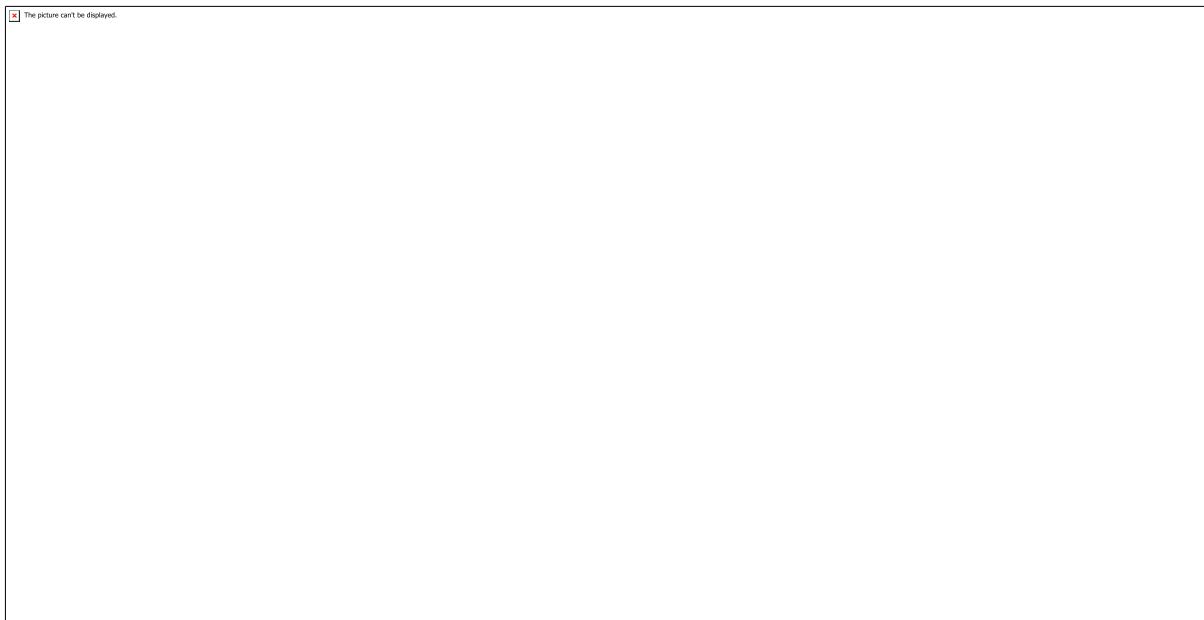
**Now, whenever you create or update a record in the "Department\_c" related to a "College\_c," the "TotalCount\_c" field on the "College\_c" will automatically update to show the total number of related records.**

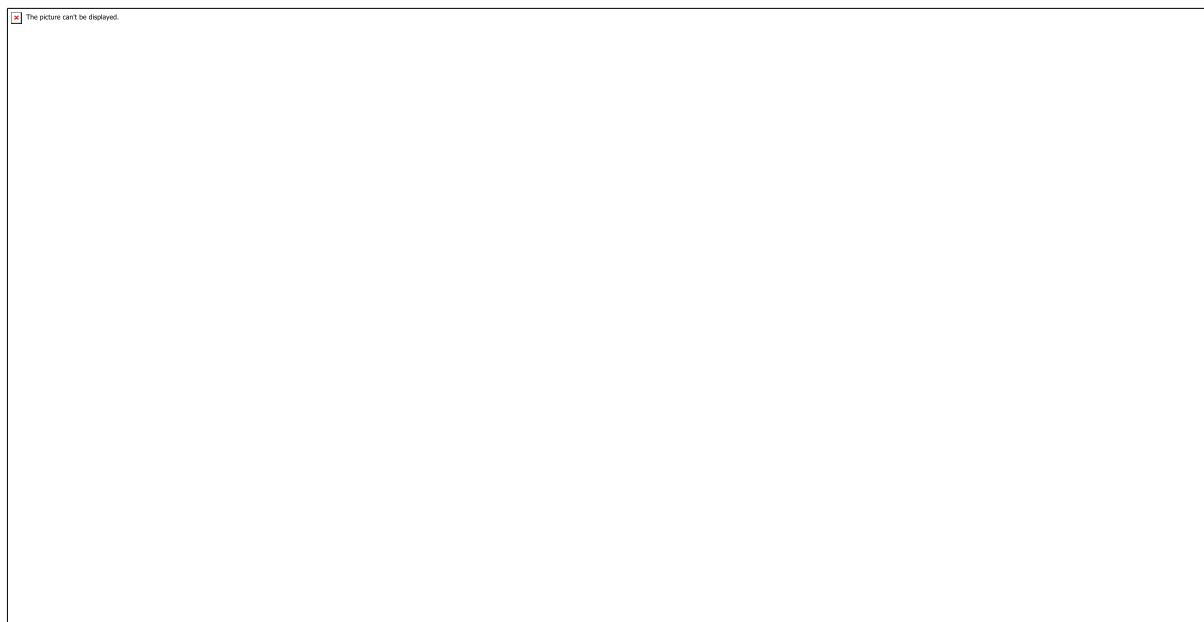
**Remember to adjust field-level security, validation rules, and page layouts as needed to ensure that your custom objects and fields are appropriately configured for your organization's requirements.**











MECW

My college colleges CDepartments student Content

Search...

New Contact Edit New Opportunity

college mecw

Related Details

college Name	mecw	Owner	krishna s
Total count	2		
phone	9087116402		
Email	kion@gmail.com		
Location	90, 80		

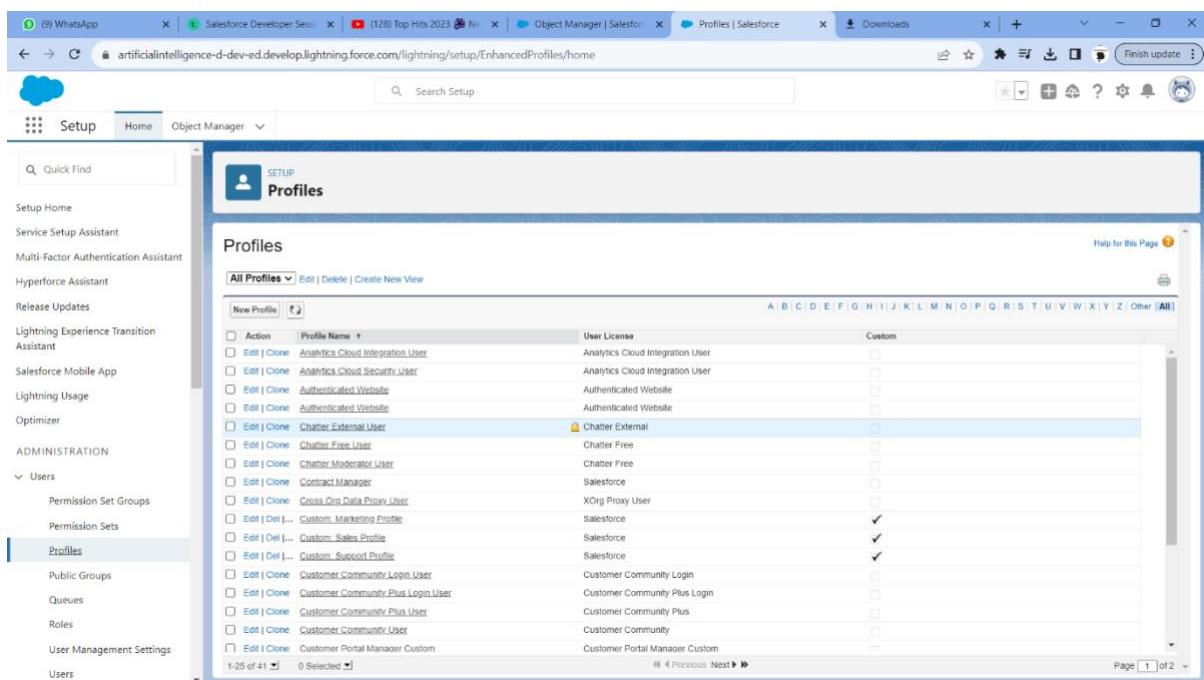
Created By krishna s. 01/10/2023, 11:16 am Last Modified By krishna s. 01/10/2023, 11:19 am

History

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

Solution:

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



The screenshot shows the Salesforce Setup interface with the 'Profiles' page open. The left sidebar is collapsed, and the main area displays a table of profiles. The table has columns for 'Action', 'Profile Name', 'User License', and 'Custom'. The 'Custom' column contains several checked checkboxes, indicating that these profiles are custom profiles. The 'Profile Name' column lists various profile names, including 'Analytics Cloud Integration User', 'Analytics Cloud Security User', 'Authenticated Website', 'Chatter External User', 'Chatter Free User', 'Chatter Moderator User', 'Contract Manager', 'Cross Org Data Proxy User', 'Custom - Marketing Profile', 'Custom - Sales Profile', 'Custom - Support Profile', 'Customer Community Login User', 'Customer Community Plus Login User', 'Customer Community Plus User', 'Customer Community User', and 'Customer Portal Manager Custom'. The 'User License' column lists corresponding license types like 'Analytics Cloud Integration User', 'Analytics Cloud Integration User', 'Authenticated Website', etc.

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 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 | All

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. Required Information

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

Save Cancel

Salesforce Developer Session | (128) Top Hits 2023 | Object Manager | Salesforce | Profiles | Salesforce | Downloads | + | - | Search Setup | Setup | Home | Object Manager | Help for this Page

**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

Quick Find

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 | + | - | Search Setup | Setup | Home | Object Manager | Help for this Page

**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	Custom Profile: <input checked="" type="checkbox"/>
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	Global Layout [View Assignment]	Operating Hours Layout [View Assignment]
Home Page Layout	Not Assigned [View Assignment]	Order [View Assignment]
Account	Home Page Default [View Assignment]	Order Product [View Assignment]
Alternative Payment Method	Account Layout [View Assignment]	Payment [View Assignment]
Appointment Invitation	Alternative Payment Method Layout [View Assignment]	Payment Authorization [View Assignment]
Asset	Appointment Invitation Layout [View Assignment]	Payment Authorization Adjustment [View Assignment]
	Asset Layout [View Assignment]	Payment Gateway [View Assignment]

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

## Manager

Set the permissions and page layouts for this profile.

**Profile Edit**

Name	Manager	Save	Save & New	Cancel
User License	Salesforce Platform	Custom Profile <input checked="" type="checkbox"/>		
Description				

**Custom App Settings**

Analytics Studio (standard__Insights)	Visible <input type="checkbox"/>	Default <input type="radio"/>	Platform (standard__Platform)	Visible <input type="checkbox"/>	Default <input type="radio"/>
App Launcher (standard__AppLauncher)	Visible <input type="checkbox"/>	Default <input type="radio"/>	WDC (standard__Work)	Visible <input type="checkbox"/>	Default <input type="radio"/>
Not (not)	Visible <input checked="" type="checkbox"/>	Default <input type="radio"/>			

**Service Provider Access**

Tab Settings

Overwrite users' personal tab customizations

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

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

## Manager

Set the permissions and page layouts for this profile.

**Communication Subscription Channel Types**

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

**Individuals**

Locations	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Party Consents	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Push Topics	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
Sellers	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
Streaming Channels	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
User External Credentials	<input type="checkbox"/>	<input type="checkbox"/>				

**Custom Object Permissions**

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

**Enhancement Requests**

Basic Access	Data Administration				
Read	Create	Edit	Delete	View All	Modify All
Session Times Out After	2 hours of inactivity				
Session Security Level Required at Login	--None--				

**Session Settings**

**Password Policies**

User passwords expire in  90 days  180 days  365 days  Never

Enforce password history  3 passwords remembered  5 passwords remembered  7 passwords remembered

Minimum password length  8  10  12  14  16  18  20  22  24  26  28  30  32  34  36  38  40  42  44  46  48  50  52  54  56  58  60  62  64  66  68  70  72  74  76  78  80  82  84  86  88  90  92  94  96  98  100

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

Setup Home Object Manager

Quick Find

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

Profiles

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

Custom Object Permissions

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

Changelog comment for password policies

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

Setup Home Object Manager

Quick Find

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

Profiles

Custom Object Permissions

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

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

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

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

Salesforce Developer Session | artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j00000WQbz%2Fe%3FretURL%3D%252F00e5j0... | Object Manager | Salesforce | Profiles | Salesforce | Downloads | + | - | Search Setup | Finish update

## Setup

### 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"/>	<input type="checkbox"/>										

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

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

Salesforce Developer Session | artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/ManageUsers/home | Object Manager | Salesforce | Users | Salesforce | Downloads | + | - | Search Setup | Finish update

## Setup

### Users

#### All Users

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

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

View: All Users | Edit | Create New View

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>   Edit   Login	Adriana Divya	datan	test_divya_4w@bytb9wtk.tszgrg9kxpx_3qj8efoyzwms.h43t4kze6mea@gmail.com		<input checked="" type="checkbox"/>	JMS User
<input type="checkbox"/>   Edit	Chatter Expert	Chatter	chatty_00d500000bc5skkeab.lo0hfwmgnote@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>   Edit   Login	Ellington Amelia	ash	amelia.ellington.146kxc9p000in.d6cwydcu04wh.hnb0wmwvtheho.wguctor1dav@gmail.com		<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/>   Edit	S. Gopal	GS	kot120@gmail.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>   Edit	User Integration	integ	integration@00d500000bc5skkeab.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>   Edit	User Security	sec	insightssecurity@00d500000bc5skkeab.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

Salesforce Developer Session | artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005%2Fe%3FretURL%3D%252F005%253FisUserEntityOv... | Users | Salesforce | Downloads

Setup Home Object Manager

Users

New User

User Edit Save Save & New Cancel

General Information

First Name: [ ] Last Name: [ ] Role: <None Specified>

Aliases: [ ] User License: [ ] Salesforce Integration

Email: [ ] Profile: [ ] Salesforce API Only System Integrations

Username: [ ] Active:

Nickname: [ ] Marketing User:

Title: [ ] Offline User:

Company: [ ] Knowledge User:

Department: [ ] Flow User:

Division: [ ] Service Cloud User:

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

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

Accessibility Mode (Classic Only):  High-Contrast Palette on Charts:

Load Lightning Pages While Scrolling:  Debug Mode:

Help for this Page

Salesforce Developer Session | artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005%2Fe%3FretURL%3D%252F005%253FisUserEntityOv... | Users | Salesforce | Downloads

Setup Home Object Manager

Users

New User

User Edit Save Save & New Cancel

General Information

First Name: sowmiya Last Name: bela Role: <None Specified>

Aliases: sbae User License: [ ] Salesforce Platform

Email: 2k20cse179@kiot.ac.in Profile: [ ] Manager

Username: 2k21it@kiot.ac.in Active:

Nickname: User169616771282564526 Marketing User:

Title: worker Offline User:

Company: kiot bank Knowledge User:

Department:  Flow User:

Division:  Service Cloud User:

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

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

Accessibility Mode (Classic Only):  High-Contrast Palette on Charts:

Load Lightning Pages While Scrolling:  Debug Mode:

Help for this Page

Screenshot of a web browser showing the Salesforce Setup interface and a Gmail inbox.

The top window is the Salesforce Setup interface, specifically the "Users" page. The user details for "Sowmya bala" are displayed, including her name, email (2k21it@kiot.ac.in), and various profile settings like Marketing User, Active, and Manager. The sidebar shows navigation links for Setup, Home, Object Manager, and various administrative modules.

The bottom window is a Gmail inbox. A new email from support@salesforce.com is visible, with the subject "Welcome to Salesforce!". The email body contains a "Verify Account" button, a URL (<https://artificialintelligence-d-dev-ed-develop.my.salesforce.com>), and a welcome message. The Gmail interface includes a sidebar with Mail, Chat, Spaces, Meet, and Drafts sections.

Salesforce Change Your Password

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

- 8 characters
- 1 letter
- 1 number

\* New Password: ..... Good

\* Confirm New Password: ..... Match

Security Question: In what city were you born?

\* Answer: salem

Change Password

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

Login | Salesforce

Username: 2k21it@kiot.ac.in

Password: .....

Log In

Remember me

Forgot Your Password?

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

WATCH ON DEMAND

AIDay

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Recently Viewed | Bank | Salesfo... +

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

MECW

mecw Bank customers Home

Bank Recently Viewed

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

Bank Name ↓

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

Search...

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

Incognito Finish update

Display Density

Comfy (selected)

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...

Incognito Finish update

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

Phone No.: 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'). The 'Save' button is highlighted. The background shows a 'Recently Viewed' list of customers.

**Bottom Screenshot:** The customer record for 'madhu' is displayed in the 'Details' view. The record shows 'customer Name' as 'madhu' and 'Bank' as 'boi'. The 'Created By' field shows 'sowmiya bala' on 01/10/2023, 7:17 pm. The 'Last Modified By' field also shows 'sowmiya bala' on the same date and time. A green success message at the top right states 'customer "madhu" was created.'

The screenshot shows the Salesforce Setup interface for managing Profiles. The left sidebar is titled "Setup" and includes sections for Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Update, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage Optimizer, and ADMINISTRATION. Under ADMINISTRATION, the "Users" section is expanded, showing sub-options: Permission Set Groups, Permission Sets, Profiles (which is currently selected), Public Groups, Queues, Roles, and User Management Settings. The main content area is titled "Profiles" and displays a table of existing profiles. The table columns are: Action, Profile Name, User License, and Custom. The profiles listed are:

Action	Profile Name	User License	Custom
<a href="#">Edit   Clone</a>	salesforce API Only System Integrations	Salesforce Integration	<input type="checkbox"/>
<a href="#">Edit   Delete</a>	salesman@999	Salesforce	<input checked="" type="checkbox"/>
<a href="#">Edit   Clone</a>	Silver Partner User	Silver Partner	<input type="checkbox"/>
<a href="#">Edit   Clone</a>	Solution Manager	Salesforce	<input type="checkbox"/>
<a href="#">Edit   Clone</a>	Standard Platform User	Salesforce Platform	<input type="checkbox"/>
<a href="#">Edit   Clone</a>	Standard User	Salesforce	<input type="checkbox"/>
<a href="#">Edit   Clone</a>	System Administrator	Salesforce	<input type="checkbox"/>

At the bottom of the page, there are navigation links for "1 of 7" and "0 Selected", and a footer bar with links to "4 Previous", "Next > 10", and "Page 1 of 1".

The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected under 'ADMINISTRATION'. The main content area is titled 'Clone Profile' and displays a form for cloning an existing profile. The 'Profile Name' field is populated with 'SalesManager'. A note at the top states 'You must select an existing profile to clone from.' with a required information icon.

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

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

Profiles

Profile salesmanage

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

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

Login IP Range (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	Modified By
					GQPAL_S_01/10/2023, 7:19 pm	GQPAL_S_01/10/2023, 7:19 pm

**Page Layouts**

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

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

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

Profiles

Profile Edit salesmanage

Set the permissions and page layouts for this profile.

**Profile Edit**

Name	salesmanage	User License	Salesforce Platform	Description	Custom Profile
					✓

**Custom App Settings**

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

**Service Provider Access**

**Tab Settings**

Overwrite users' personal tab customizations

**Standard Tab Settings**

Home	Default On
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

Custom Object Permissions

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

Password complexity requirement: Must include alpha and numeric characters

Password question requirement: Cannot contain password

Maximum invalid login attempts: 10

Lockout effective period: 15 minutes

Obfuscate secret answer for password resets

Require a minimum 1 day password lifetime

Don't immediately expire links in forgot password emails

Salesforce Developer Session 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

Custom Object Permissions

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

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

Save

Save & New

Cancel

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

Setup Home Object Manager

Search Setup

User Management Settings

New User

User Edit

General Information

First Name:

Last Name:

Alias:

Email:

Username:

Nickname:

Title:

Company:

Department:

Division:

Role: <None Specified>

User License: Salesforce Integration

Profile: Salesforce API Only System Integrations

Active:

Marketing User:

Offline User:

Knowledge User:

Flow User:

Service Cloud User:

Site.com Contributor User:

Site.com Publisher User:

WDC User:

Data.com User Type: -None-

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

Accessibility Mode (Classic Only):

High-Contrast Palette on Charts:

Load Lightning Pages While Scrolling:

Debug Mode:

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

Setup Home Object Manager

Search Setup

User Management Settings

New User

User Edit

General Information

First Name: madhu

Last Name: b

Alias: mb

Email: 2k20cse179@kiot.ac.in

Username: 2k20cse179@kiot.ac.in

Nickname: User169616842428654192

Title: worker

Company: kiot bank

Department: Sales

Division:

Role: <None Specified>

User License: Salesforce Platform

Profile: salesmanager

Active:

Marketing User:

Offline User:

Knowledge User:

Flow User:

Service Cloud User:

Site.com Contributor User:

Site.com Publisher User:

WDC User:

Data.com User Type: -None-

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

Accessibility Mode (Classic Only):

High-Contrast Palette on Charts:

Load Lightning Pages While Scrolling:

Debug Mode:

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

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

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

This screenshot is identical to the one above, showing the 'Users' configuration page in the Salesforce Setup interface. The 'User Management Settings' section is selected, and the 'Users' configuration page is displayed with the same fields and settings as the first screenshot.

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

User Detail

Name	madhu b	Role	Marketing User
Alias	mb	User License	Active
Email	2k20csit179@kiot.ac.in [Verify]	Profile	salesmanager
Username	2k20csit@kiot.ac.in	Offline User	<input type="checkbox"/>
Nickname	User16961604242805419206	Knowledge User	<input type="checkbox"/>
Title	worker	Flow User	<input type="checkbox"/>
Company	kiot bank	Service Cloud User	<input type="checkbox"/>
Department	Sales	Site.com Contributor User	<input type="checkbox"/>
Division		Site.com Publisher User	<input type="checkbox"/>
Address	41/104, aruppampalayam, umamasolapuram .. Paraiakkadu , salem- 603608 SALEM 633608 TAMIL NADU	WDC User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Mobile Push Registrations	<input checked="" type="checkbox"/> View
Locale	English (India)	Data.com User Type	<input type="checkbox"/>
Language	English	Accessibility Mode (Classic Only)	<input type="checkbox"/>
Delegated Approver	Manager	Debug Mode	<input type="checkbox"/>
Receive Approval Request Emails	Only if I am an approver	High-Contrast Palette on Charts	<input checked="" type="checkbox"/>
Federation ID		Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>
App Registration: One-Time Password Authenticator		Customize CRM Contact Hours	

Gmail | Search in mail | Active | 1 of 6,486

Welcome to Salesforce!

Click below to verify your account.

Verify Account

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

Again, welcome to Salesforce!

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

Reply | Forward

Change Your Password | Salesforce

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



## Change Your Password

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

- 8 characters
- 1 letter
- 1 number

\* New Password  
..... Good

\* Confirm New Password  
..... Match

Security Question  
In what city were you born?

\* Answer  
india

Change Password

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

Recently Viewed | Bank | Salesforce

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

MECW

mecw Bank customers Home

Bank

Recently Viewed

0 items • Updated a few seconds ago

Bank Name

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...

customers Recently Viewed [+](#)

0 items • Updated a few seconds ago

customer Name

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

List View

(9) WhatsApp | Salesforce Developer Session | (128) Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce! | Reset Password | Salesforce | Incognito (3) | Finish update

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

Setup Home Object Manager

Search Setup

Permission Sets

Help for this Page

Permission Sets

This page allows you to create, view, and manage permission sets.

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

All Permission Sets [Edit](#) | [Delete](#) | [Create New View](#)

Action	Permission Set Label	Description	License
<input type="checkbox"/>	Access to activity	Allows access to the store. Lets users see products and categories. ...	B2B Buyer Permission Set One Seat
<input type="checkbox"/>	Buyer	Includes all buyer capabilities, and allows access to manage carts an...	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/>	Buyer Manager	Denotes that the user is a Sales Cloud or Service Cloud user.	CRM User
<input type="checkbox"/>	Commerce Admin	Allow access to commerce admin features.	Commerce Admin Permission Set License Seat
<input type="checkbox"/>	Contact Center Admin	Manage Service Cloud Voice contact centers that use Amazon Conn...	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Agent	Access agent features in Service Cloud Voice contact centers tha...	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Supervisor	Access supervisor features in Service Cloud Voice contact centers th...	Service Cloud Voice User
<input type="checkbox"/>	Experience Profile Manager	Lets users create, read, edit, and delete locations, sublocations, que...	Salesforce
<input type="checkbox"/>	Facility Manager	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		

1-25 of 29 [Selected](#) [4 Previous](#) [Next 10](#) Page [1](#) of 2

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

## Step 2:

### Permission Sets:

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

### Object-Level Security:

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

### Record-Level Security:

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

### Ownership:

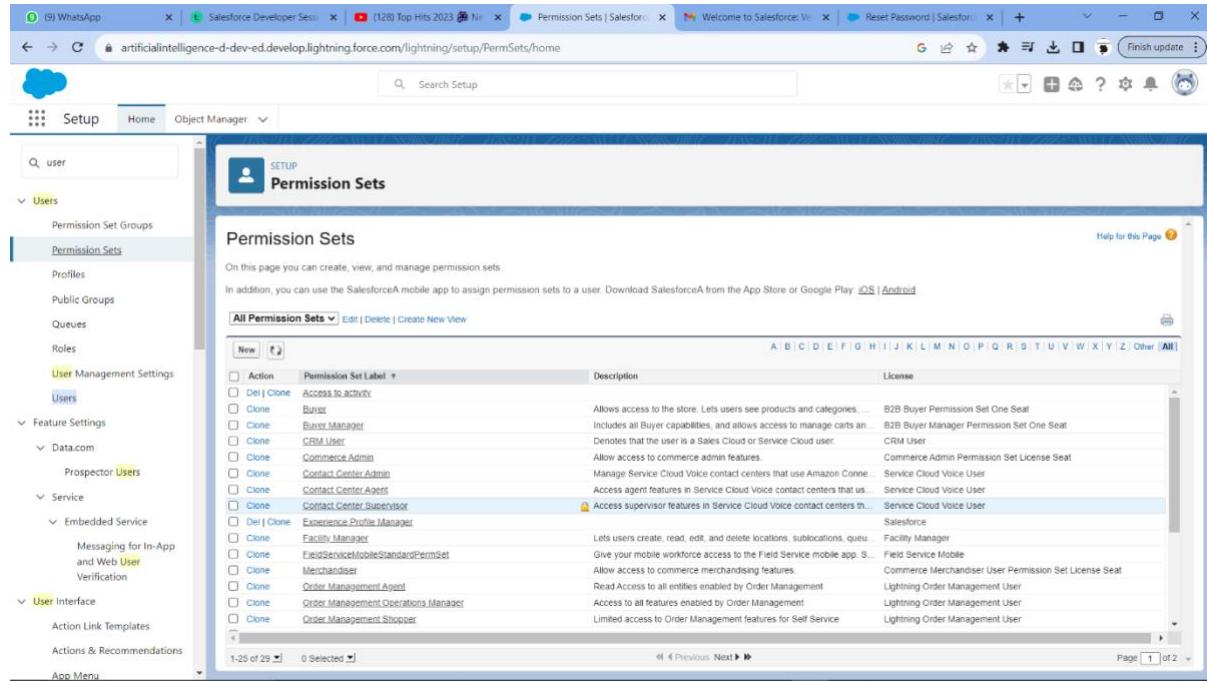
- Ensure that the Account records are owned by the respective users, with User A owning their records and User B owning their records.

## Organization-Wide Defaults:

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

## Testing:

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



The screenshot shows the Salesforce 'Permission Sets' page. The left sidebar is collapsed, and the main area displays a table of permission sets. The table has columns for Action, Permission Set Label, Description, and License. The 'Permission Set Label' column lists various roles and profiles, such as 'Access\_to\_activity', 'Buyer', 'Buyer\_Manager', etc. The 'Description' column provides a brief overview of the permissions granted by each set. The 'License' column indicates the specific license required for each set. The table is paginated at the bottom, showing 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 an...	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 Conn...	Service Cloud Voice User
<input type="checkbox"/>	Clone	Access agent features in Service Cloud Voice contact centers that us...	Service Cloud Voice User
<input type="checkbox"/>	Contact_Center_Agent	Access supervisor features in Service Cloud Voice contact centers th...	Salesforce
<input type="checkbox"/>	Contact_Center_Supervisor	Lets users create, read, edit, and delete locations, sublocations, queu...	Facility Manager
<input type="checkbox"/>	Dej_Clone	Give your mobile workforce access to the Field Service mobile app. ...	Field Service Mobile
<input type="checkbox"/>	Clone	Allow access to commerce merchandising features.	Commerce Merchandiser User Permission Set License Seat
<input type="checkbox"/>	Clone	Read Access to all entities enabled by Order Management.	Lightning Order Management User
<input type="checkbox"/>	Clone	Access to all features enabled by Order Management.	Lightning Order Management User
<input type="checkbox"/>	Clone	Limited access to Order Management features for Self Service.	Lightning Order Management User

Salesforce Developer Session | artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2Fudd%2FPermissionSet%2FnewPermissionSet.apexp

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

Service

Embedded Service

Messaging for In-App and Web User Verification

User Interface

Action Link Templates

Actions & Recommendations

App Menu

SETUP

Permission Sets

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:  -None-

Save Cancel

Help for this Page

Salesforce Developer Session | artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2Fudd%2FPermissionSet%2FnewPermissionSet.apexp

Setup Home Object Manager

Q Search Setup

Users

Permission Set Groups

Permission Sets

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Public Groups

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App Menu

SETUP

Permission Sets

Create

Enter permission set information

Label:  salesmanager

API Name:  salesmanager

Description:

Session Activation Required:

Select the type of users who will use this permission set

Who will use this permission set?

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

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

License:  -None-

Save Cancel

Help for this Page

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

**Permission Set Overview:**

Setting	Description	Value
API Name	salesmanager	
Namespace Prefix	GOPALS	
Created By	GOPALS	
Last Modified By	GOPALS	
Session Activation Required	unchecked	

**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 Insights 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 Assessments	No Access	--	--
Appointment Categories	No Access	3	--
Appointment Invitations	No Access	17	--
Appointment Invites	--	4	--
Appointment Schedule Aggregate	No Access	--	--
Appointment Schedule Logs	No Access	--	--
Appointment Topic Time Slots	No Access	6	--
Asset Actions	No Access	30	--
Asset Action Sources	No Access	18	--
Asset Relationships	--	10	--
Assets	No Access	42	--
Asset State Periods	No Access	11	--

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

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

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

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

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

The 'Field Permissions' section shows the following settings:

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

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

The left sidebar shows the same navigation menu under 'Users'.

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

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

The 'Field Permissions' section remains the same as in the previous screenshot.

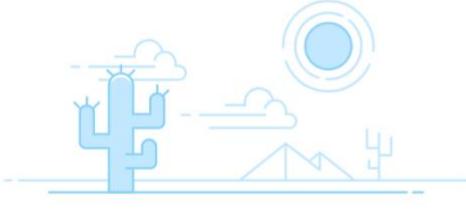
Salesforce Developer Session | (128) Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce: V | Reset Password | Salesforce | + | - | Search Setup | Setup | Home | Object Manager | ... | Finish update

... > SETUP > PERMISSION SET 'SALESMANAGER'

**salesmanager**

**Current Assignments**

No assignments defined.



Add Assignment

Search Setup

Setup Home Object Manager

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Salesforce Developer Session | (128) Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce: V | Reset Password | Salesforce | + | - | Search Setup | Setup | Home | Object Manager | ... | Finish update

... > SETUP > PERMISSION SET 'SALESMANAGER' / ASSIGNMENT

**SELECT USERS TO ASSIGN**

**All Users**

1 item selected

Full Name ↑	All... ↓	Username	Role	Profile
Amelia Ellington	aelli	amelia.ellington.146kxcp9oodlh.d6cwpdcuo4wh.hnbdwvwvhq.wguctpr1dalv@gmail.com	Force.com - App Subscription User	
Chatter Expert	Chatty	chatty.00d5j00000bcskkkeab.lo0bfhwmpqjke@chatter.salesforce.com	Chatter Free User	
Diya Adanna	dadan	test_diya_pas.4w8bjybi9wik.tszgrgsbkxpx.3gi0fovzwrs.h43bkzw6mea@gmail.com	UMS User	
GOPAL S	GS	kiot520@gmail.com	System Administrator	
Integration User	integ	integration@00d5j00000bcskkkeab.com	Analytics Cloud Integration User	
madhu b	mb	2k20csit@kiot.ac.in	salesmanager	
Security User	sec	insightssecurity@00d5j00000bcskkkeab.com	Analytics Cloud Security User	
sowmya bala	sbala	2k21it@kiot.ac.in	Manager	

Cancel Next

Search this list...

Setup Home Object Manager

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Service

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Messaging for In-App and Web User Verification

User Interface

Action Link Templates

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App Menu

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

Setup Home Object Manager

Select an Expiration Option For Assigned Users

No expiration date (radio button selected)

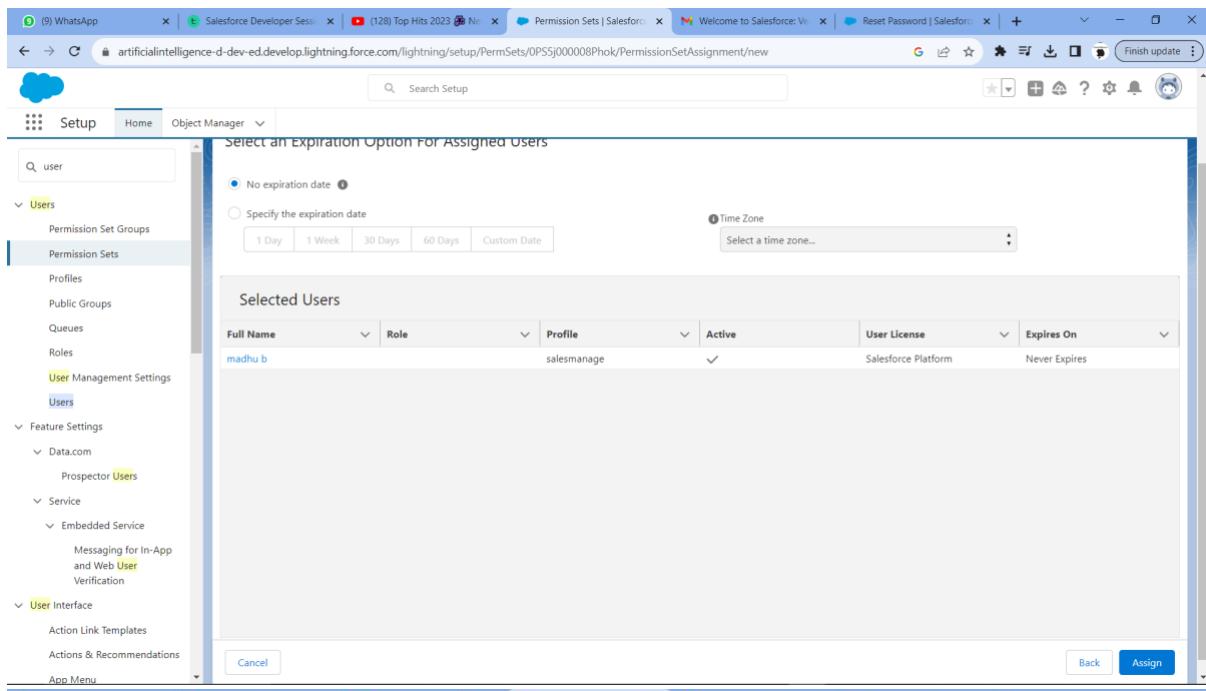
Specify the expiration date (radio button)

Time Zone: Select a time zone...

Selected Users:

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

Cancel Back Assign



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

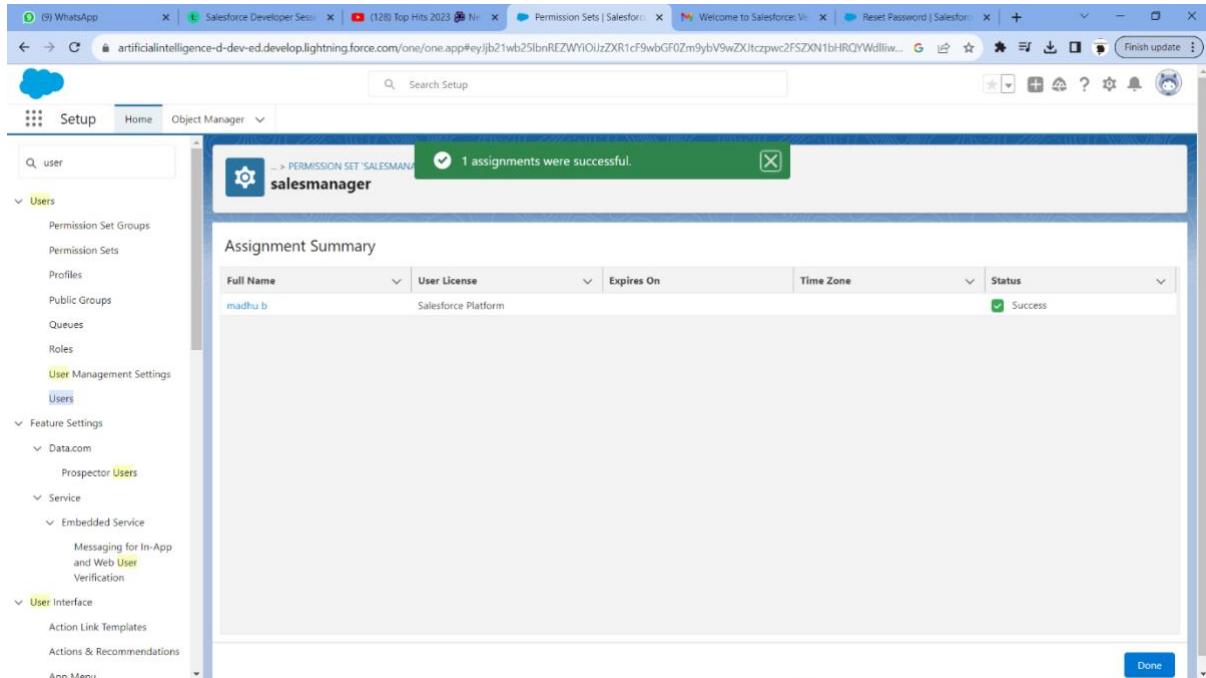
Setup Home Object Manager

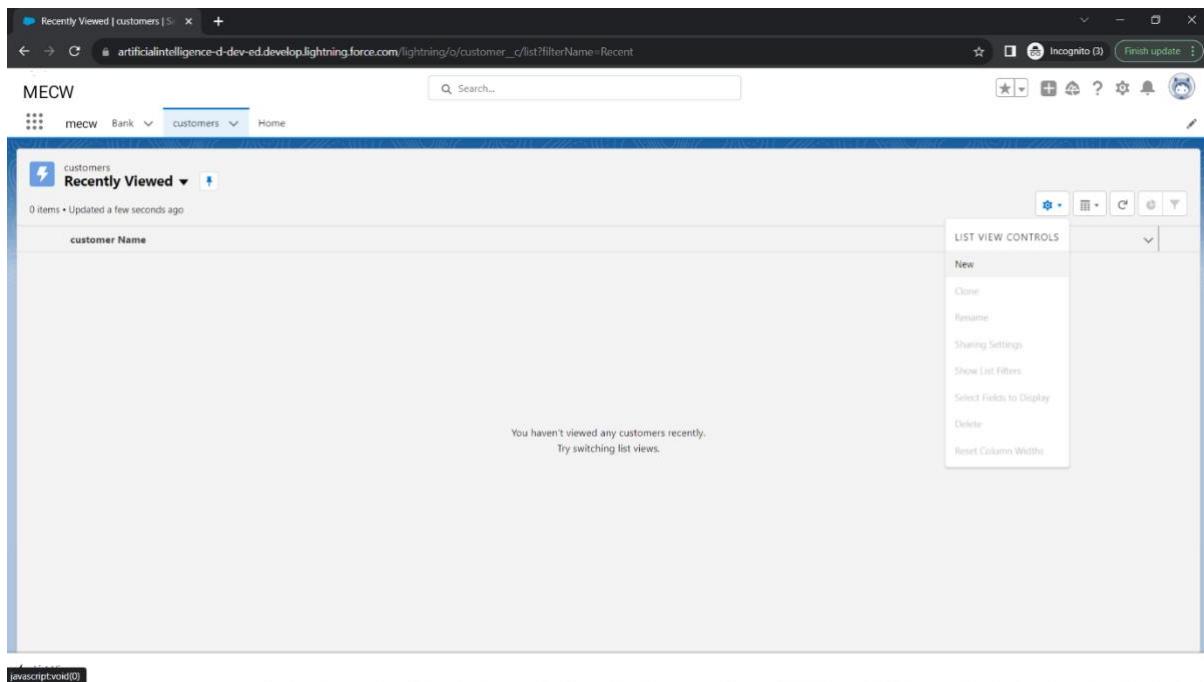
PERMISSION SET 'SALESMANAGER' 1 assignments were successful.

Assignment Summary

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

Done



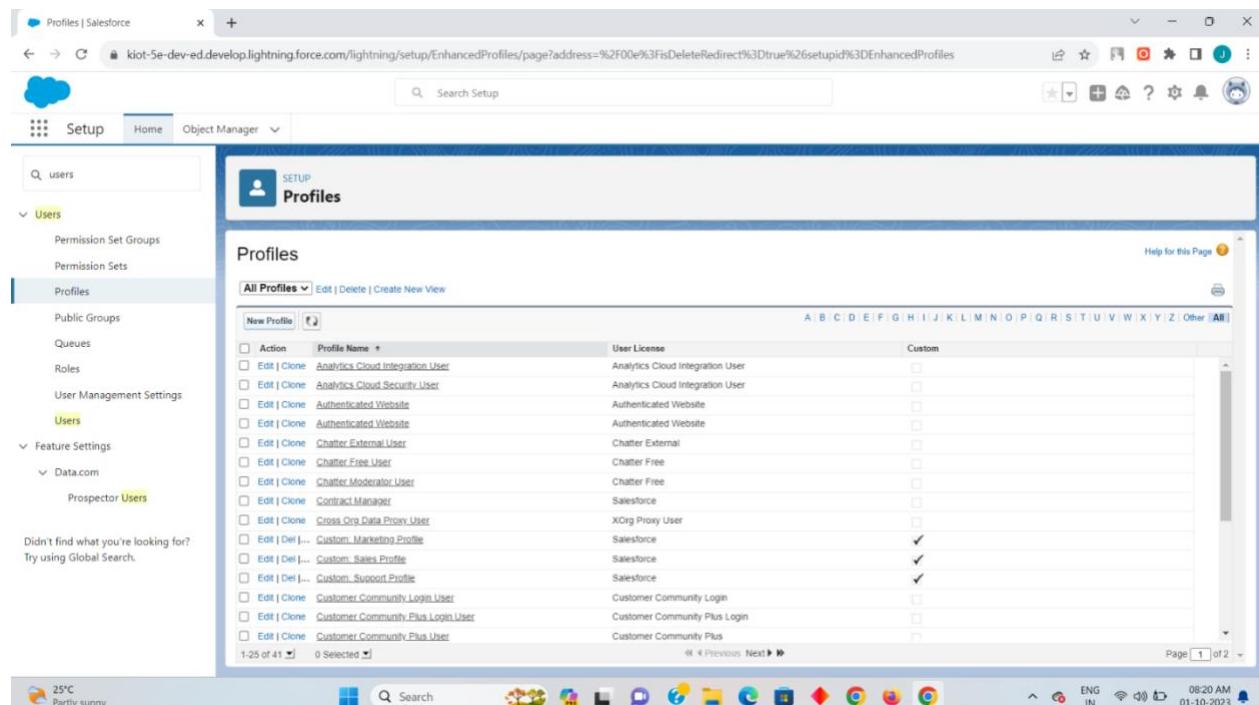


3. . Suppose there are 2 Users and they are having Create, Read, Edit access on Account Object with the same profile but we want to open up the access for one user to delete how will you implement the Security setting.

Solution:

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

## Setup-quick search[profile]



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

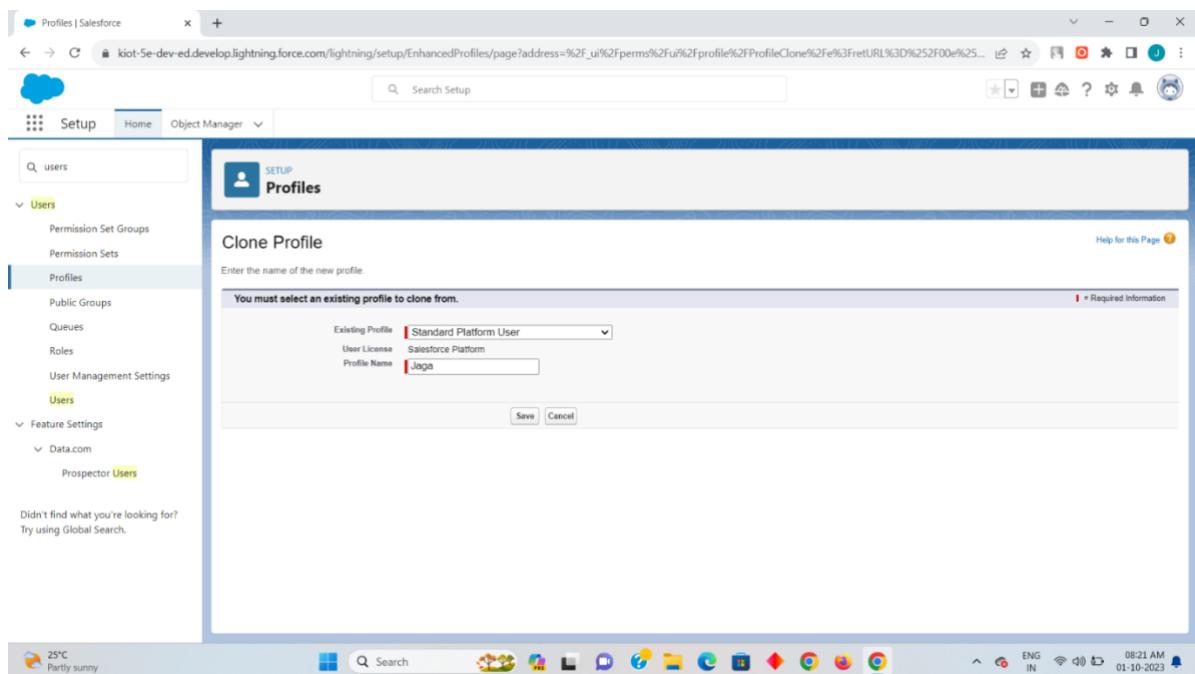
- Page Header:** Profiles | Salesforce
- Search Bar:** Search Setup
- Left Sidebar:** Includes links for Setup, Home, Object Manager, and sections for Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and Feature Settings.
- Current Section:** Profiles
- Section Header:** Profiles
- Sub-Header:** All Profiles
- Table:** A grid of profiles with columns for Action, Profile Name, User License, and Custom. Some profiles have checkboxes checked under User License.

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

- Page Footer:** 25°C Partly sunny, Search, various icons, ENG IN, 08:20 AM, 01-10-2023

## Step 2:

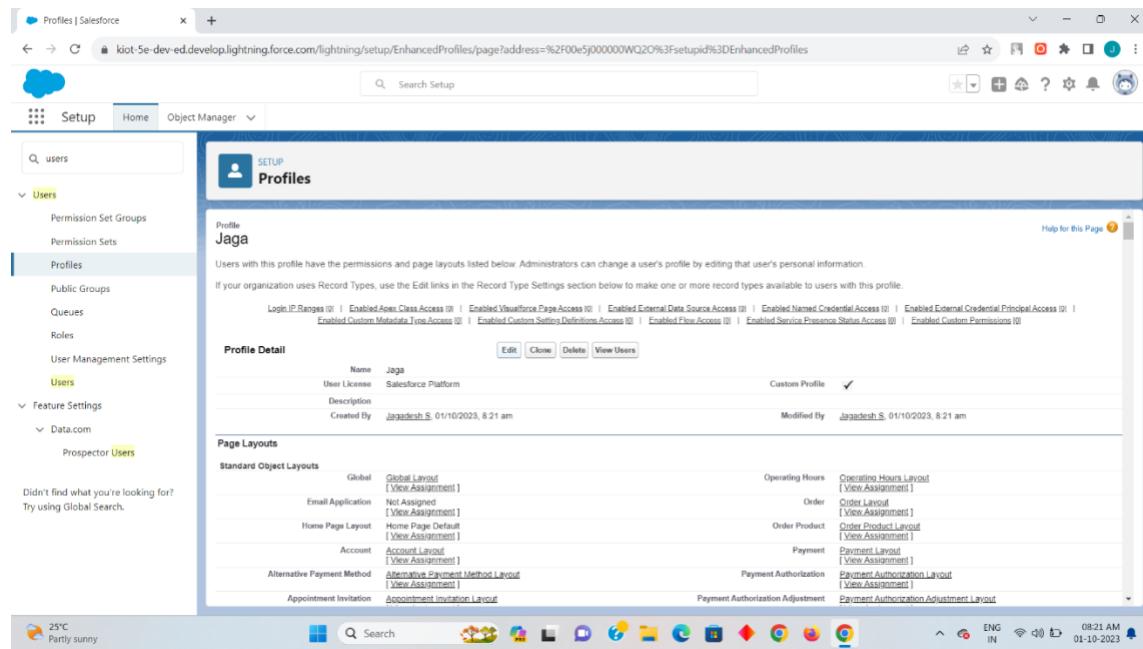
Click on the new to create a new profile along with the label and Api



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

## Step 3:

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



Profiles | Salesforce

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

Setup Home Object Manager

Search Setup

Users

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

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

SETUP Profiles

Communication Subscriptions, Contact Types, Locations, Party Consents, Push Topics, Sellers, Streaming Channels, User External Credentials

Communication Subscription Consents, Communication Subscription Timings, Contacts, Contact Point Addresses, Contact Point Consents, Contact Point Emails

Basic Access Read Create Edit Delete Data Administration View All Modify All

Providers Resources

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

Enable different Experience Cloud login policies for employees Separate Experience Cloud site and Salesforce login authentication for employees Relax login IP restrictions Skip employee device activation during Experience Cloud site login

25°C Partly sunny 08:21 AM 01-10-2023

Profiles | Salesforce

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

Setup Home Object Manager

Search Setup

Users

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

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

SETUP Profiles

Communication Subscriptions, Contact Types, Locations, Party Consents, Push Topics, Sellers, Streaming Channels, User External Credentials

Communication Subscription Consents, Communication Subscription Timings, Contacts, Contact Point Addresses, Contact Point Consents, Contact Point Emails

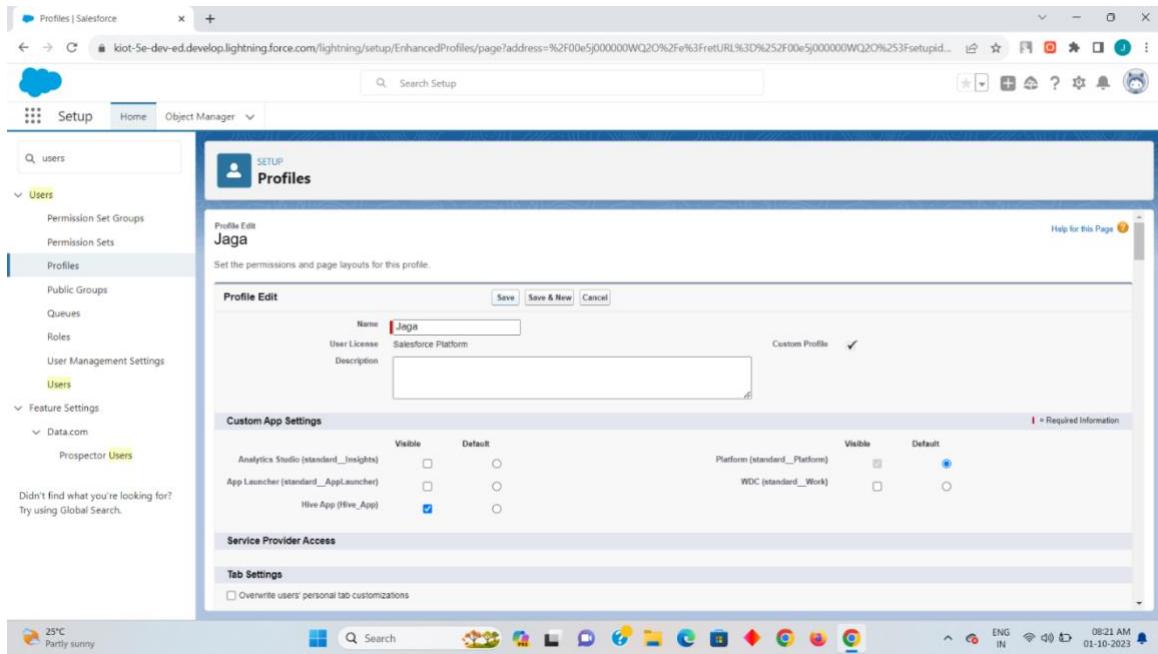
Basic Access Read Create Edit Delete Data Administration View All Modify All

Providers Resources

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

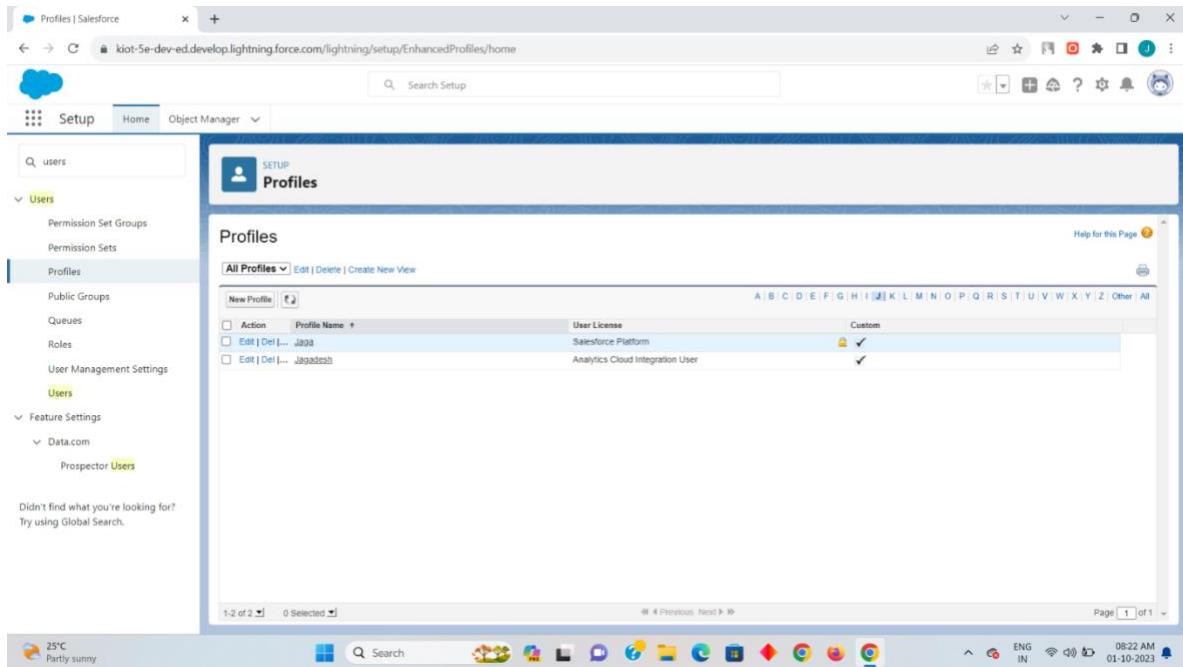
Enable different Experience Cloud login policies for employees Separate Experience Cloud site and Salesforce login authentication for employees Relax login IP restrictions Skip employee device activation during Experience Cloud site login

25°C Partly sunny 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.00d500000c0joseaf.6z@berkx44@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	Edit	Grey_Jane	jgrey	jane.grey_hygnimmoam.cz7dz2koogt3@gmail.com	<input checked="" type="checkbox"/>	Customer Community User
<input type="checkbox"/>	Edit	S.Jaga	JS	jaga266@gmail.com	<input type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	Edit	S.Jagadeesh	JS	wow@gmail.com	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Edit	S.Jagadeesh	JS	jaga1117@gmail.com	<input type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	Edit	User_Integration	Integ	integration@00d500000c0joseaf.com	<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	Edit	User_Security	sec	insightssecurity@00d500000c0joseaf.com	<input checked="" type="checkbox"/>	Analytics Cloud Security User

Users | Salesforce

Setup Home Object Manager

Search Setup

New User

User Edit Save Save & New Cancel

**General Information**

First Name	Jagadesh11
Last Name	S
Alias	R
Email	jag123@gmail.com
Username	jag123@gmail.com
Nickname	User169612875144962992
Title	
Company	
Department	
Division	

**Role** Director, Channel Sales **User License** Salesforce Platform **Profile** -None- **Active** -None- **Marketing User** Jaga 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

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25°C Partly sunny

08:23 AM 01-10-2023 ENG IN

Users | Salesforce

Setup Home Object Manager

Search Setup

New User

User Edit Save Save & New Cancel

**General Information**

First Name	Jagadesh22
Last Name	S
Alias	R
Email	jag1@gmail.com
Username	jag1@gmail.com
Nickname	User169612879963618745
Title	
Company	
Department	
Division	

**Role** Marketing Team **User License** Salesforce Platform **Profile** -None- **Active** -None- **Marketing User** Jaga 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

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

25°C Partly sunny

08:23 AM 01-10-2023 ENG IN

Users | Salesforce

Setup Home Object Manager

Search Setup

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

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Ent S.Jaga	s	jag10@gmail.com	CEO	<input type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	Ent S.Jagadeesh	s	w0r@gmail.com	SF Admin	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Ent S.Jagadeesh	s	jag1117@gmail.com	Channel Sales Team	<input type="checkbox"/>	Standard Platform User
<input checked="" type="checkbox"/>	Ent S.Jagadeesh11	s	jag123@gmail.com	Director, Channel Sales	<input checked="" type="checkbox"/>	Jaga
<input checked="" type="checkbox"/>	Ent S.Jagadeesh22	s	jag10@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

25°C Partly sunny

08:24 AM 01-10-2023 ENG IN

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.

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

All Permission Sets | Edit | Delete | Create New View

New

Action	Permission Set Label	Description	License
<input type="checkbox"/>	Buyer	Allows access to the store. Lets users see products and categories, includes all buyer capabilities, and allows access to manage carts and...	B2B Buyer Permission Set One Seat
<input type="checkbox"/>	Buyer Manager	Denotes that the user is a Sales Cloud or Service Cloud user.	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/>	CRM User	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 us...	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Supervisor	Access supervisor features in Service Cloud Voice contact centers th...	Service Cloud Voice User
<input type="checkbox"/>	Delinquent	Experiences Profile Manager	Salesforce
<input type="checkbox"/>	Field Service Manager	Lets users create, read, edit, and delete locations, sublocations, queu...	Facility Manager
<input type="checkbox"/>	FoodServiceMobileChangerPermSet	Give your mobile workforce access to the Food Service mobile app. S...	Food Service Worker
<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

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 30 | 0 Selected |

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

Permission Set Groups

Permission Sets

Profiles

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Prospector Users

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

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

Create

Enter permission set information

Label:  API Name:  Description:   
 Session Activation Required

Select the type of users who will use this permission set

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

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

License:

Save Cancel

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

25°C Partly sunny

Q Search

ENG IN 08:24 AM 01-10-2023

Permission Sets | Salesforce

kiot-5e-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2FOPSSj000008Pgt%3FsfdclframeOrigin%3Dhttps%253A%252F%252Fkiot-5e-dev-ed.devel...

Setup Home Object Manager

Search Setup

Users

Permission Set Groups

Permission Sets

Profiles

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Queues

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User Management Settings

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Data.com

Prospector Users

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

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

Video Tutorial | Help for this Page

Permission Set Overview

Description  
License  
Session Activation Required  
Last Modified By Jagadish S. 01/10/2023, 8:24 am

Apps

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

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ENG IN 08:24 AM 01-10-2023

Permission Sets | Salesforce

kiot-5e-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2FOPSSj000008Pgt%3Ds%3DEntityPermissions

Setup Home Object Manager

Search Setup

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

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

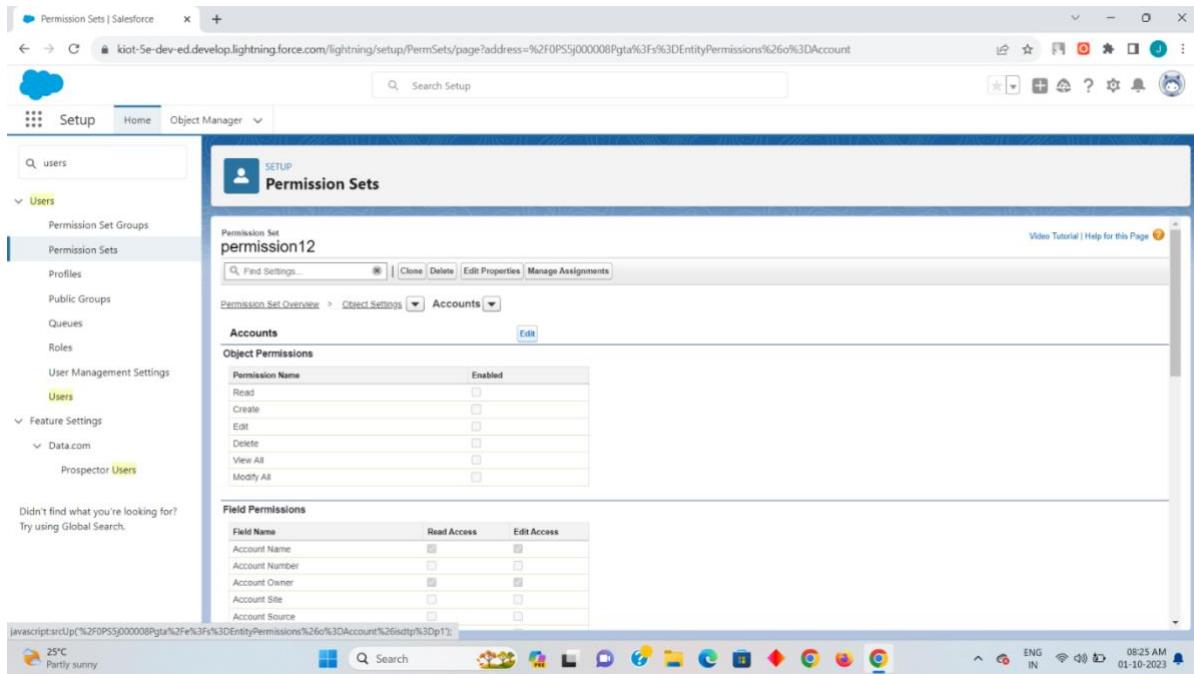
25°C Partly sunny

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 Anomaly Event Stores	No Access	14	--
Age Analytics Query Requests	No Access	--	--
Application Usage Assessments	No Access	--	--
Appointment Categories	No Access	3	--
Appointment Invitations	No Access	17	--
Appointment Invites	--	4	--
Appointment Schedule Aggregates	No Access	--	--
Appointment Schedule Logs	No Access	--	--
Appointment Topic Time Slots	No Access	6	--
Asset Actions	No Access	30	--
Asset Action Sources	No Access	18	--

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ENG IN 08:25 AM 01-10-2023



## Step 7:

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

The screenshots illustrate the process of creating and configuring a Permission Set in Salesforce.

**Screenshot 1:** The 'Permission Sets' page shows the 'Accounts' tab selected under 'Object Permissions'. The 'Edit' button is visible at the top right of the table.

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 2:** The 'Accounts' tab is still selected, but now the 'Edit' button is highlighted.

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

**Screenshot 3:** The 'Field Permissions' section is visible, showing the 'Edit Access' column for various fields like Account Name, Account Number, etc.

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

## Step 8

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

The screenshot shows the 'Permission Sets | Salesforce' page in a browser. The URL is [kiot-5e-dev-ed.lightning.force.com/lightning/setup/PermSets/OPSS000008PgtA/PermissionSetAssignment/home](https://kiot-5e-dev-ed.lightning.force.com/lightning/setup/PermSets/OPSS000008PgtA/PermissionSetAssignment/home). The left sidebar is open, showing 'Users' under 'Permission Set Groups'. The main content area is titled 'permission12' and shows the 'Current Assignments' section. It features a decorative illustration of a cactus, sun, and clouds. Below the illustration, a message says 'No assignments defined.' There is a 'Add Assignment' button at the top right of the list area.

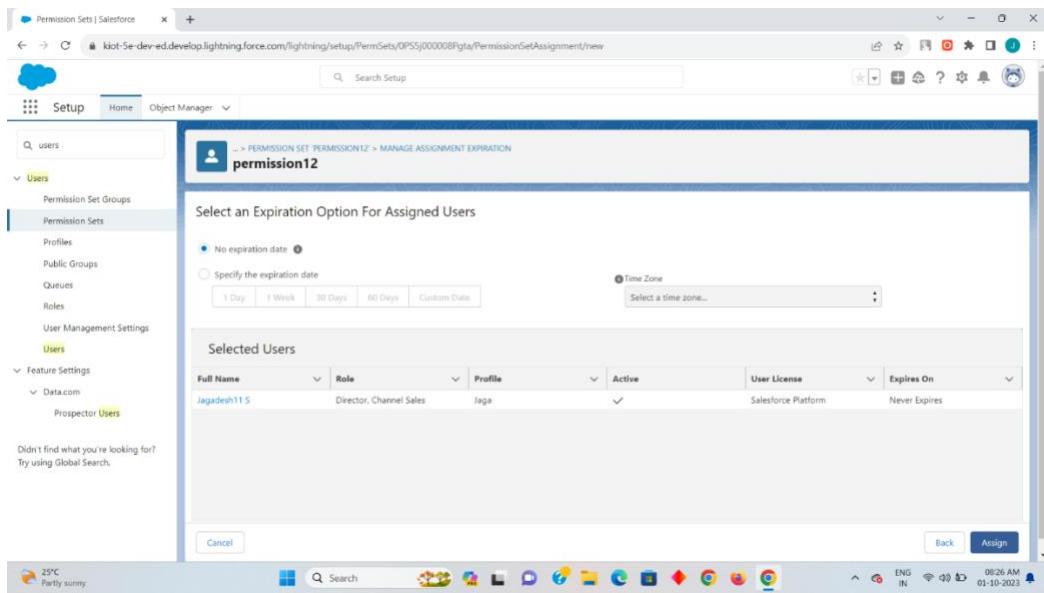
The screenshot shows the 'PERMISSION SET permission12 > MANAGE ASSIGNMENT EXPIRATION' dialog box. The title bar says 'PERMISSION SET permission12 > MANAGE ASSIGNMENT EXPIRATION'. The main area is titled 'Select Users to Assign' and shows a list of users under the heading 'All Users'. A search bar at the top right contains the text 'jagadesh'. The user list includes:

Full Name	Alias	Username	Role	Active	Profile
jagadesh S	JS	wow@gmail.com	SF Admin	<input checked="" type="checkbox"/>	System Administrator
jagadesh S	JS	jaga1117@gmail.com	Channel Sales Team	<input type="checkbox"/>	Standard Platform User
jagadesh11 S	JIS	jww123@gmail.com	Director, Channel Sales	<input checked="" type="checkbox"/>	Jaga
jagadesh22 S	JIS	jaat@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Jaga

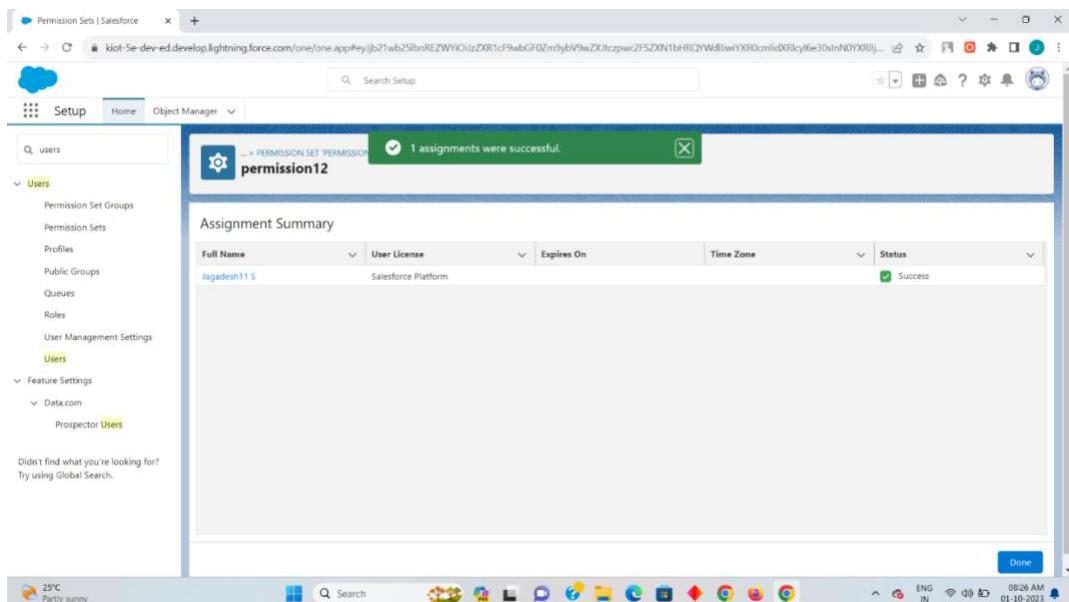
At the bottom right of the dialog box is a 'Next' button.

This screenshot is identical to the previous one, showing the 'PERMISSION SET permission12 > MANAGE ASSIGNMENT EXPIRATION' dialog box. However, the user 'Jagadesh11 S' has been selected, indicated by a checked checkbox in the 'Active' column. The rest of the user list and interface are the same.

Click on next.



Now click on Assign.



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

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

Solution:

#### Step 1: Create a Custom Object

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

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

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

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

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

Email Template  
**Thank You Email - Survey**

**Details** Related

**Information**

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

**Message Content**

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

**Additional Information**

Created By Rakesh Gupta, 12/21/2020, 4:23 PM	Last Modified By Rakesh Gupta, 12/21/2020, 4:32 PM
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## Step 3: Create an Email Alert

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

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

**Edit Email Alert** Help for this Page ?

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

**Email Alert Edit**

**Edit Email Alert** ! = Required Information

Description	Survey - Thank You Email						
Unique Name	Survey_Thank_You_Email <a href="#">i</a>						
Object	Survey Result						
Email Template	Thank You Email - Survey <a href="#">o</a>						
Protected Component	<input type="checkbox"/>						
Recipient Type	Search: <input type="text" value="User"/> <a href="#">o</a> for: <input type="text"/> <input type="button" value="Find"/>						
Recipients	<table border="1"> <thead> <tr> <th>Available Recipients</th> <th>Selected Recipients</th> </tr> </thead> <tbody> <tr> <td>User: Integration User User: Rakesh Gupta User: Security User</td> <td>Email Field: Email</td> </tr> <tr> <td style="text-align: center;"> <a href="#">Add</a>  <a href="#">◀</a>  <a href="#">Remove</a> </td> <td></td> </tr> </tbody> </table>	Available Recipients	Selected Recipients	User: Integration User User: Rakesh Gupta User: Security User	Email Field: Email	<a href="#">Add</a> <a href="#">◀</a> <a href="#">Remove</a>	
Available Recipients	Selected Recipients						
User: Integration User User: Rakesh Gupta User: Security User	Email Field: Email						
<a href="#">Add</a> <a href="#">◀</a> <a href="#">Remove</a>							
You can enter up to five (5) email addresses to be notified.							
Additional Emails	<input type="text"/>						
From Email Address	Current User's email address <a href="#">o</a>						
<input type="checkbox"/> Make this address the default From email address for this object's email alerts. <a href="#">i</a>							

**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 &gt; Value"/>
Name__c	<input type="text" value="(!Name.firstName) {!Name.lastName}"/>
Rating__c	<input type="text" value="A_a Rating"/>
<a href="#">+ Add Field</a>	
<input type="checkbox"/> 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.

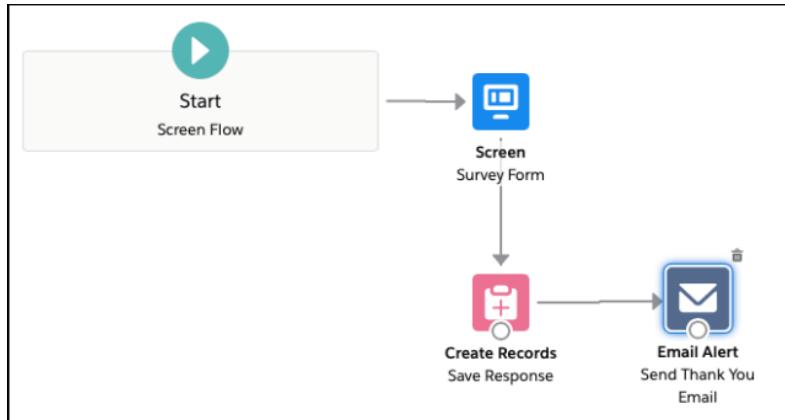
Edit "Survey - Thank You Email" email alert

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	
Aa * Record ID	{!Save_Response}

Cancel Done

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



### 1.Click Save.

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

3.Click **Show Advanced**.

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

5. Type: Screen Flow

6. API Version for Running the Flow: 51

7. Interview Label: Survey

{!\$Flow.CurrentDateTime}

8. Click Save.

Save as

A New Version A New Flow

\* Flow Label \* Flow API Name

Survey Survey

Description

Hide Advanced

How to Run the Flow i

User or System Context—Depends on How Flow is Launched

\* Type

Screen Flow

\* API Version for Running the Flow

51

Interview Label i

Insert a resource... 🔍

Survey {!\$Flow.CurrentDateTime}

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

Status: Active

Type: Screen Flow

Version Number: 2

Cancel Save

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

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

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

The screenshot shows the Salesforce IDE interface. At the top, there is a menu bar with options like File, Edit, Debug, Test, Workspace, Help, and navigation arrows. Below the menu is a tab bar with 'VFPageToLC.app \*'. The main area contains the following code:

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

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

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

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

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

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

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

The screenshot shows the Salesforce Visualforce Page editor. At the top, there's a header with 'Visualforce Page' and 'Survey'. Below it is a 'Page Edit' toolbar with 'Save', 'Quick Save', 'Cancel', 'Where is this used?', 'Component Reference', and 'Preview' buttons. 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. Under 'Available for Lightning Experience, Experience Builder mobile, and the mobile app', the 'Checkmark' checkbox is checked. Under 'Require CSRF protection on GET requests', the checkbox is unchecked. Below this is a 'Visualforce Markup' tab which contains the following code:

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

```

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

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

1. Click **Setup**.

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

The screenshot shows the 'Site Edit' page in Salesforce. The page has a header with 'Site Edit' and buttons for 'Save' and 'Cancel'. It contains several input fields and dropdown menus for configuring a site. The 'Site Label' and 'Site Name' are both set to 'Survey'. The 'Default Web Address' is 'http://kathiarch-developer-edition.gus.force.com/survey'. The 'Active' checkbox is checked. Under 'Site Pages', 'Active Site Home Page' is 'Survey' and 'Inactive Site Home Page' is 'InMaintenance'. Under 'Site Settings', 'Site Template' is 'SiteTemplate'. There are also fields for 'Site Robots.txt', 'Site Favorite Icon', 'Analytics Tracking Code', 'URL Rewriter Class', 'Enable Feeds' (unchecked), 'Clickjack Protection Level' (set to 'Allow framing by the same origin only (Recommended)'), 'Require Secure Connections (HTTPS)' (checked), 'Lightning Features for Guest Users' (checked), 'Upgrade all requests to HTTPS' (checked), 'Enable Content Sniffing Protection' (checked), 'Enable Browser Cross Site Scripting Protection' (checked), 'Referrer URL Protection' (checked), and 'Guest Access to the Payments API' (unchecked).

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