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Salesforce  
Developer(Course)  
Assignment no 1**

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Batch : 2024  
Zone no : Zone 8**

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

Solution:

Step 1: Create Custom Objects

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

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

- Header:** Includes the Salesforce logo, a search bar labeled "Search Setup", and various navigation icons.
- Breadcrumbs:** "Setup" > "Object Manager" > "New Custom Object".
- Title Bar:** "SETUP" and "New Custom Object".
- Page Content:**
  - Custom Object Definition Edit:** Buttons for "Save", "Save & New", and "Cancel". A note says "Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles." with links to "Tell me more!" and "Don't show this message again".
  - Custom Object Information:** Fields for "Label" (college), "Plural Label" (colleges), and "Example" (Account). A checkbox "Starts with vowel sound" is unchecked. A note says "The Object Name is used when referencing the object via the API." with fields for "Object Name" (college) and "Example" (Account).
  - Description:** A large text area for describing the object.
  - 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:** A dropdown menu showing "None".
  - Enter Record Name Label and Format:** A note about Record Name appearing in various places. Fields for "Record Name" (College Name) and "Example" (Account Name). A dropdown "Data Type" set to "Text".
  - Optional Features:** Checkboxes for "Allow Reports", "Allow Activities", "Track Field History", "Allow in Chatter Groups", and "Enable Licensing".
  - Object Classification:** A note about classification settings. Checkboxes for "Allow Sharing", "Allow Bulk API Access", and "Allow Streaming API Access".
  - Deployment Status:** Radio buttons for "In Development" (unchecked) and "Deployed" (selected).
  - Search Status:** A note about search settings. A checkbox for "Allow Search" is unchecked.
  - Object Creation Options (Available only when custom object is first created):** Checkboxes for "Add Notes and Attachments related list to default page layout" and "Launch New Custom Tab Wizard after saving this custom object".
  - Buttons at the bottom:** "Save", "Save & New", and "Cancel".

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

The screenshot shows the Salesforce Setup Object Manager interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager'. The main title is 'Object Manager' with a 'New Custom Object' subtitle. A message bar at the top says 'Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles.' Below this is the 'Custom Object Definition Edit' section. It includes fields for 'Label' (set to 'department') and 'Plural Label' (set to 'departments'), both with examples of 'Account' and 'Accounts'. There's also a checkbox for 'Starts with vowel sound'. The 'Object Name' field is set to 'department' with an example of 'Account'. A 'Description' field is present but empty. Under 'Context-Sensitive Help Setting', the option 'Open the standard Salesforce.com Help & Training window' is selected. The 'Content Name' dropdown is set to 'None'. The 'Enter Record Name Label and Format' section shows 'Record Name' as 'Department Name' with an example of 'Account Name' and 'Data Type' set to 'Text'. The 'Optional Features' section contains checkboxes for 'Allow Reports', 'Allow Activities', 'Track Field History', 'Allow in Chatter Groups', and 'Enable Licensing'. The 'Object Classification' section has checkboxes for 'Allow Sharing', 'Allow Bulk API Access', and 'Allow Streaming API Access', with 'Allow Sharing' checked. The 'Deployment Status' section shows 'Deployed' is selected. The 'Search Status' section has a checkbox for 'Allow Search' which is unchecked. The 'Object Creation Options' section has checkboxes for 'Add Notes and Attachments related list to default page layout' and 'Launch New Custom Tab Wizard after saving this custom object', 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.

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

**Header:** Search Setup, Setup, Home, Object Manager

**Breadcrumbs:** SETUP > OBJECT MANAGER CDepartment

**Left Sidebar (Details):**

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

**Right Panel (Details):**

Setting	Value
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

**Buttons:** Edit, Delete

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

**Header:** Search Setup, Setup, Home, Object Manager

**Breadcrumbs:** SETUP > OBJECT MANAGER CDepartment

**Left Sidebar (Details):**

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- Triggers
- Flow Triggers
- Validation Rules

**Right Panel (New Relationship):**

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

Help for this Page Step 3 of 6 Previous Next Cancel

Field Label	college
Field Name	college
Description	
Help Text	

**Relationship Settings:**

- Child Relationship Name: CDepartments
- Sharing Setting:
  - Read Only: Allows users with at least Read access to the Master record to create, edit, or delete related Detail records.
  - Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.
- Allow reparenting:  Child records can be reparented to other parent records after they are created
- Auto add to custom report type:  Add this field to existing custom report types that contain this entity

**Lookup Filter:**

The screenshot shows the Salesforce Setup interface for creating a new relationship. The left sidebar lists various setup options under 'Fields & Relationships'. The main panel is titled 'New Relationship' and is on 'Step 2. Choose the related object'. It shows a dropdown menu set to 'college'. Navigation buttons at the top right include 'Help for this Page', 'Previous', 'Next', and 'Cancel'.

The screenshot shows the Salesforce Setup interface for creating a new custom field. The left sidebar lists various setup options under 'Fields & Relationships'. The main panel is titled 'New Custom Field' and is on 'Step 1. Choose the field type'. Under 'Data Type', the 'Roll Up Summary' option is selected. A detailed description of the field type is provided, mentioning it creates a relationship that links the object to another object. The 'Next' button is visible at the top right.

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

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

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

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

SETUP > OBJECT MANAGER  
CDepartment

Details

**Fields & Relationships**

4 Items, Sorted by Field Label

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)		

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

Q tabs

User Interface

Rename Tabs and Labels

**Tabs**

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	New	What Is This?
Edit   Del	Block1		Box
Edit   Del	Research Proposal		Square
Edit   Del	student		Box

**Web Tabs**

New | What Is This?

No Web Tabs have been defined.

**Visualforce Tabs**

New | What Is This?

No Visualforce Tabs have been defined.

**Lightning Component Tabs**

New | What Is This?

No Lightning component tabs have been defined.

**Lightning Page Tabs**

New | What Is This?

No Lightning Page Tabs have been defined.

**college**

**New Custom Field**

**Step 5. Add to page layouts**

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.

Help for this Page

Previous Save & New Save Cancel

**college**

**New Custom Field**

**Step 4. Establish field-level security**

Field Label: Total count  
Data Type: Roll-Up Summary  
Field Name: Total\_count  
Description:

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

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

Help for this Page

Previous Next Cancel

Setup > Object Manager college

### New Custom Field

Step 3. Define the summary calculation Step 3 of 5

Select Object to Summarize  
Master Object: college  
Summarized Object: CDepartments

Select Roll-Up Type  
 COUNT  
 SUM  
 MIN  
 MAX  
Field to Aggregate: None

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

Help for this Page

Setup > Object Manager college

### New Custom Field

Step 2. Enter the details Step 2 of 5

Field Label: Total count  
Field Name: Total\_count  
Description:  
Help Text:

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

Help for this Page

**college**

**New Custom Field**

**Step 1. Choose the field type**

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

**Data Type**

- None Selected Select one of the data types below.
- Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
- Roll Up Summary 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.
- Lookup Relationship Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
  - The relationship field is required on all detail records.
  - The ownership and sharing of detail records are determined by the master record.
  - When a user deletes the master record, all detail records are deleted.
  - You can create rollup summary fields on the master record to summarize the detail records.
- Master-Detail Relationship The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.
- External Lookup Relationship Allows users to select a True (checked) or False (unchecked) value.

**college**

**Fields & Relationships**

4 Items, Sorted by Field Label

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.**

Setup Home Object Manager

Search Setup

User Interface Rename **Tabs** and Labels

New Custom Object Tab

Step 2 of 3

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

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

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

Previous Next Cancel

The screenshot shows the Salesforce Setup interface for creating a new custom object tab. The top navigation bar includes 'Setup', 'Home', 'Object Manager', and a search bar. The left sidebar has sections for 'User Interface' (selected), 'Rename Tabs and Labels', and 'Tabs'. A message at the bottom says 'Didn't find what you're looking for? Try using Global Search.'

**New Custom Object Tab**

**Step 1. Enter the Details** Step 1 of 3

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

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

Object	college
Tab Style	Jewel

(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-
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Enter a short description

Description

**Next** **Cancel**

The screenshot shows the Salesforce Setup interface for adding a new custom tab to custom apps. The top navigation bar includes 'Setup', 'Home', 'Object Manager', and a search bar. The left sidebar has sections for 'User Interface' (selected), 'Rename Tabs and Labels', and 'Tabs'. A message at the bottom says 'Didn't find what you're looking for? Try using Global Search.'

**Step 3. Add to Custom Apps** Step 3 of 3

Choose the custom apps 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 Custom App.

Custom App	<input checked="" type="checkbox"/> 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"/>

Append tab to users' existing personal customizations

**Previous** **Save** **Cancel**

**New Custom Object Tab**

Step 1. Enter the Details Step 1 of 3

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

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

Object	CDepartment
Tab Style	Lightning

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

Splash Page Custom Link: -None--

Description:

Next Cancel

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

The screenshot shows the Salesforce Setup interface with the 'Tabs' page selected. The left sidebar has a search bar and navigation links for 'User Interface' and 'Rename Tabs and Labels'. The main content area is titled 'Custom Tabs' and includes a brief description of what custom tabs are. Below this is a table for 'Custom Object Tabs' with columns for Action, Label, Tab Style, and Description. It lists tabs for 'Book1' (Box), 'CDepartments' (Lightning), 'college' (Jewel), 'Research\_Proposal' (Square), and 'student' (Box). There are also sections for 'Web Tabs', 'Visualforce Tabs', 'Lightning Component Tabs', and 'Lightning Page Tabs', each with a note indicating no tabs have been defined.

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

## 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

Related Details

college Name  
**mecw**

Total count  
2

phone  
9087116402

Email  
kiot@gmail.com

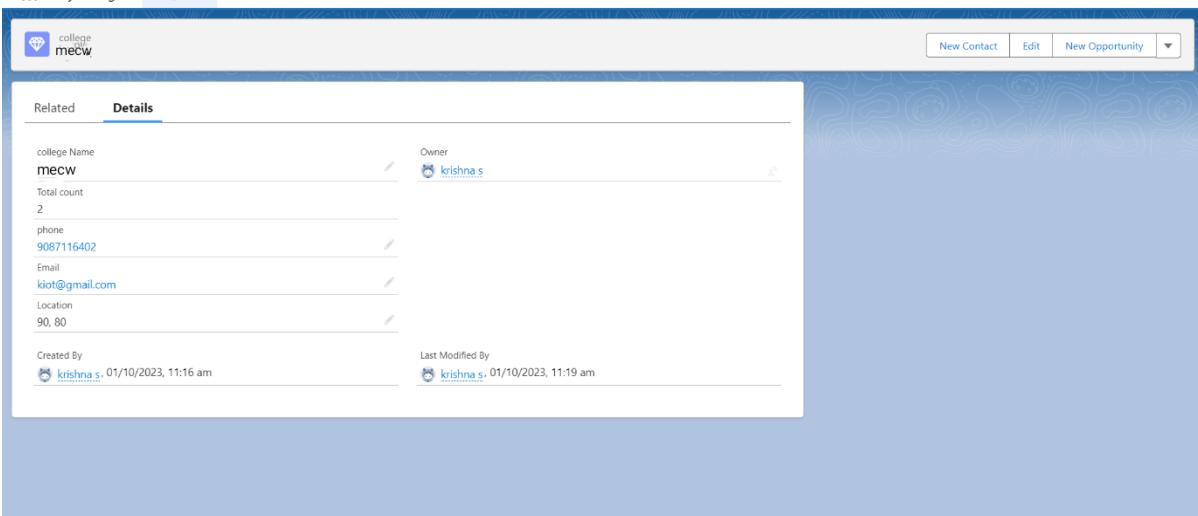
Location  
90, 80

Owner  
 krishna.s

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

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

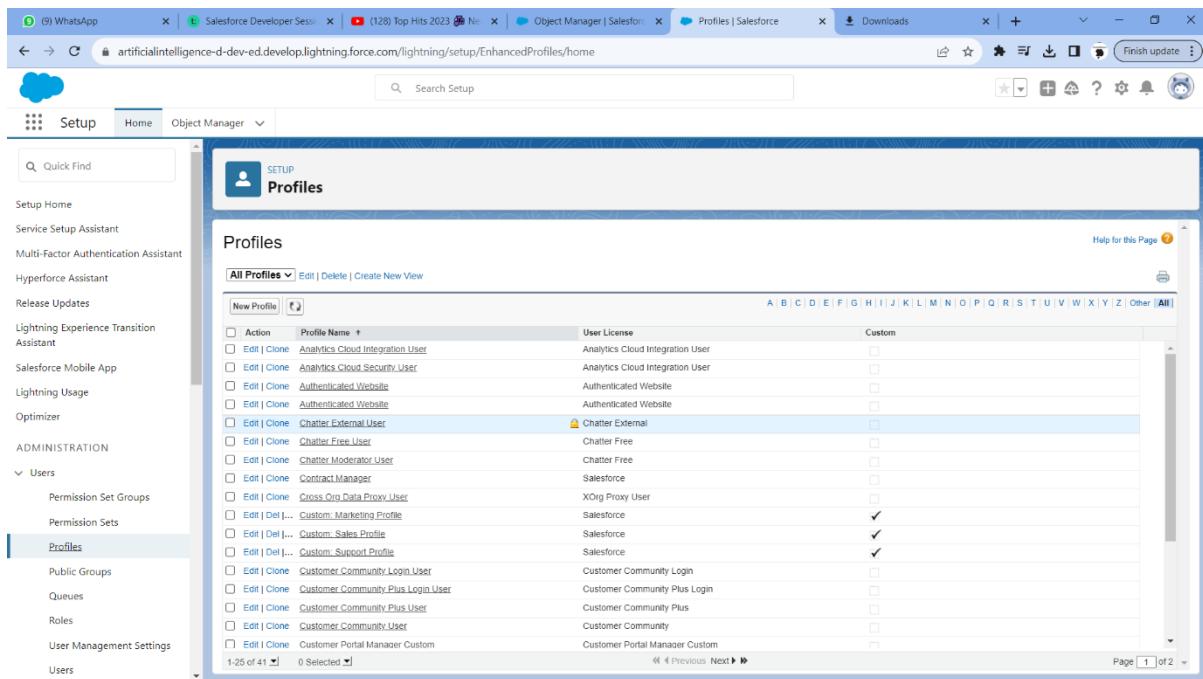
History



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

Solution:

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



The screenshot shows the Salesforce Setup interface with the 'Profiles' page 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 have been customized. The profiles listed include 'Analytics Cloud Integration User', 'Analytics Cloud Security User', 'Authenticated Website', 'Authenticated Website', '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', 'Customer Community Plus User', 'Customer Community User', and 'Customer Portal Manager Custom'. The 'Custom' checkbox is checked for profiles like 'Custom: Marketing Profile', 'Custom: Sales Profile', and 'Customer Community User'.

The screenshot shows the Salesforce Setup interface under the Profiles section. The left sidebar includes links for Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, and ADMINISTRATION (with sub-links for Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and Users). The main content area displays a table of profiles:

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"/>

Page navigation: 1-7 of 7, 0 Selected. Help for this Page.

The screenshot shows the Salesforce Setup interface under the Profiles section. The left sidebar includes links for Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, and ADMINISTRATION (with sub-links for Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and Users). The main content area displays a 'Clone Profile' dialog:

You must select an existing profile to clone from.

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

Save Cancel

Help for this Page

The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected. On the left, the navigation sidebar is open, showing various setup categories like Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, and Administration (Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, Users). The 'Profiles' section under Administration is currently selected. The main content area displays the 'Clone Profile' screen, which prompts the user to enter the name of the new profile and select an existing profile to clone from. The 'Manage' button is highlighted in red.

The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected. The left sidebar is identical to the previous screenshot, showing the 'Profiles' section under Administration. The main content area displays the 'Profile Manager' screen, which lists the details of a specific profile. The profile is named 'Manager' and has the 'Standard Platform User' license. It was created by 'SAFETY\_3' on '01/10/2023, 7:09 pm'. The 'Custom Profile' checkbox is checked. Below this, the 'Page Layouts' section is visible, showing standard object layouts for various objects like Account, Opportunity, Lead, Case, and Contact. Each layout is associated with a specific page template and settings like Order, Under Product, Payment, and Payment Authorization.

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

## Profiles

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**

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

**Service Provider Access**

Tab Settings

Overwrite users' personal tab customizations

Standard Tab Settings	Home <input checked="" type="radio"/>	Accounts <input checked="" type="radio"/>	Alert Settings <input checked="" type="radio"/>	Learning <input checked="" type="radio"/>	Libraries <input checked="" type="radio"/>	Lightning Bolt Solutions <input checked="" type="radio"/>
-----------------------	---------------------------------------	---	---	---	--	---

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 | Top Hits 2023 | Object Manager | Profiles | Salesforce | Downloads | Finish update

## Profiles

Communication Subscription Channel Types

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

Communication Subscription Consents

Contacts	<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"/>
Contact Point Consents	<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 type="checkbox"/>	<input type="checkbox"/>

Custom Object Permissions

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

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

User passwords expire in: 90 days

Enforce password history: 3 passwords remembered

Minimum password length: 8

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

Salesforce Developer Session

Object Manager | Salesforce

Profiles | Salesforce

Downloads

Finish update

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Hyperforce Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

ADMINISTRATION

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

SETUP

Profiles

Contact Point Addresses

Contact Point Consents

Contact Point Emails

Sellers

Streaming Channels

Use External Credentials

Custom Object Permissions

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

Salesforce Developer Session

Object Manager | Salesforce

Profiles | Salesforce

Downloads

Finish update

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Hyperforce Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

ADMINISTRATION

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

SETUP

Profiles

Contact Point Addresses

Contact Point Consents

Contact Point Emails

Sellers

Streaming Channels

Use External Credentials

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

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

## Profiles

Custom Object Permissions

	Bank	customers	Enhancement Requests									
	Basic Access	Data Administration	Basic Access	Data Administration								
	Read	Create	Edit	Delete	View All	Modify All	Read	Create	Edit	Delete	View All	Modify All
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 | (128) Top Hits 2023 | Object Manager | Salesforce | Users | Salesforce | Downloads | Finish update

## 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
<a href="#">Edit   Login</a>	Antonia Dilya	dadan	test_dilya_pas_4e6b9b9wtk_tszrgqzbkox_3q8cf0yzwns_h43tkzy6mea@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	LJMS User
<a href="#">Edit</a>	Chatter Export	Chatter	chatty_00d5000000cskskeah_lohbfemrjka@chatter.salesforce.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Chatter Free User
<a href="#">Edit   Login</a>	Ellington Amelia	aelli	amelia.ellington.1.46kxcp0odin6scyndcu4wh_hnbdiwmvyrho_wguctor1aly@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Standard Platform User
<a href="#">Edit</a>	S_GOPAL	GS	kot120@mail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	System Administrator
<a href="#">Edit</a>	User_Integration	integ	integration@000500000bc8skkeab.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<a href="#">Edit</a>	User_Security	sec	insightssecurity@000500000bc8skkeab.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Security User

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

Setup Home Object Manager

Users

New User

User Edit Save Save & New Cancel

General Information

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

Email: [ ] User License: Salesforce Integration

Username: [ ] Profile: Salesforce API Only System Integrations

Nickname: [ ] Active:

Title: [ ] Marketing User:

Company: [ ] Offline User:

Department: [ ] Knowledge User:

Division: [ ] Flow User:

Data.com User Type: [ ] Service Cloud User:

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

Accessibility Mode (Classic Only):

High-Contrast Palette on Charts:

Load Lightning Pages While Scrolling:

Debug Mode:

Help for this Page

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

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

Setup Home Object Manager

Users

New User

User Edit Save Save & New Cancel

General Information

First Name: sowmya Last Name: bala Role: <None Specified>

Email: 2k20cse179@kiot.ac.in User License: Salesforce Platform

Username: 2k21it@kiot.ac.in Profile: Manager

Nickname: User169616771282564526 Active:

Title: worker Marketing User:

Company: kiot bank Offline User:

Department:

Division:

Data.com User Type: [ ] Knowledge User:

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

Accessibility Mode (Classic Only):

High-Contrast Palette on Charts:

Load Lightning Pages While Scrolling:

Debug Mode:

Help for this Page

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

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. On the left, a sidebar lists various setup categories like Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, etc. The main content area displays the 'User Detail' page for a user named 'Sowmya bala'. The user's name is listed at the top, followed by a list of profile details. The 'Role' section indicates the user is a 'Manager'. Other details include email (2k20cse179@kiot.ac.in), nickname (User16961677128256452616), title (worker), company (kiot bank), and address (GMT+05:30 India Standard Time (Asia/Kolkata)). The 'Delegated Approver' section shows 'Only if I am an approver'. The 'Accessibility Mode' section has 'Classic Only' checked. The 'Federation ID' and 'App Registration' sections are also visible.

The screenshot shows a Gmail inbox with 5,318 messages. A new message from 'support@salesforce.com' is highlighted. The subject line is 'Welcome to Salesforce!'. The message body contains a 'Verify Account' button and a URL: <https://artificialintelligence-d-dev-ed.develop.my.salesforce.com>. Below the URL, it says 'Again, welcome to Salesforce!' and includes a copyright notice: '© Copyright 2000-2018 salesforce.com, inc. All rights reserved. Various trademarks held by their respective owners.'

(9) WhatsApp x | (1) Salesforce Dev x | (128) Top Hits x | Object Manager x | Users | Sales x | Downloads x | Welcome to x | Recently Viewed x | Change Your x + - □ ×

Finish update



### 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 x +

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

Incognito Finish update



### 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.

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

DISPLAY DENSITY

✓ Comfy

Compact

OPTIONS

Switch to Salesforce Classic

Add Username

New Bank | Salesforce +

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/o/Bank\_\_c/new?count=1&nooverride=1&useRecordTypeCheck=1&navigationLocation=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

Information

\* = Required Information

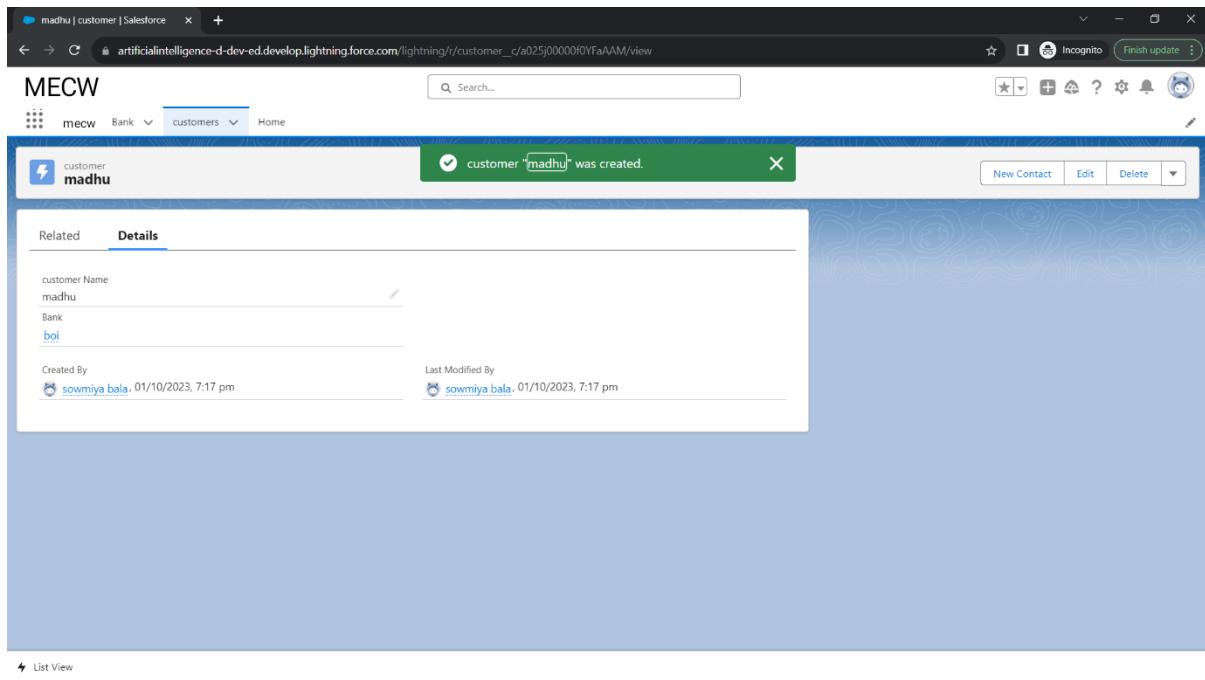
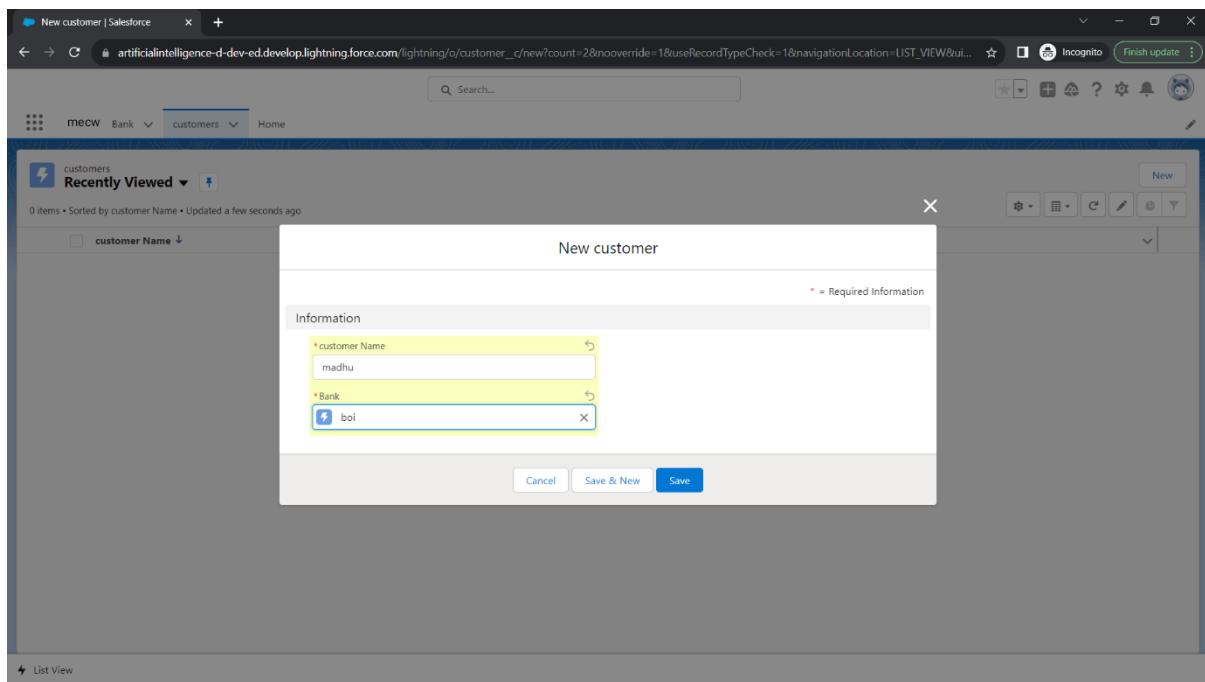
Bank Name: boi

Owner: sowmiya bala

phoneno: 0897754534

New Change Owner

Cancel Save & New Save



The screenshot shows the Salesforce Setup interface under the Profiles section. On the left, the navigation sidebar includes links for Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, and ADMINISTRATION (with sub-links for Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, and User Management Settings). The main content area displays a table titled "Profiles" with the following data:

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"/>

At the bottom of the page, there are navigation links for "Previous" and "Next", and a page number indicator "Page 1 of 1".

The screenshot shows the "Clone Profile" dialog box. The title bar says "Clone Profile". The instructions "Enter the name of the new profile." are displayed above the input field. A required information indicator "I = Required Information" is shown next to the input field. The input field contains the value "salesmanager". Below the input field are buttons for "Save" and "Cancel".

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

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.

Profile Detail

Name: salesmanage	Custom Profile: <input checked="" type="checkbox"/>
User License: Salesforce Platform	Created By: SALESMA 01/10/2023, 7:19 pm
Description:	Modified By: SALESMA 01/10/2023, 7:19 pm

Page Layouts

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

Help for this Page

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

Profile Edit

Profile Edit

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

Custom App Settings

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

Service Provider Access

Tab Settings

Standard Tab Settings

Home	Default On
Accounts	<input checked="" type="radio"/>
Opportunities	<input type="radio"/>

Learning:  Default On

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

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

Profiles

Custom Object Permissions

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

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

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

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

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

Profiles

Custom Object Permissions

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

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

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

Save | Save & New | Cancel

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

User Edit

General Information

First Name: user

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:

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 yo... | + | Finish update

User Edit

General Information

First Name: madhu

Last Name: d

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: salesmanage

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:

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 Proj | Users | Salesforce | Welcome to Salesforce: Verify your user... | + | Finish update

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

- Left Sidebar:** Shows the navigation tree under "User Management Settings" with "Users" selected.
- Mailing Address:** Fields for Street, City, Zip/Postal Code, State/Province, and Country are present.
- Single Sign On Information:** Federation ID field.
- Locale Settings:** Time Zone (GMT+05:30 India Standard Time (Asia/Kolkata)), Locale (English (India)), and Language (English).
- Approver Settings:** Delegated Approver and Manager fields, and a dropdown for Receive Approval Request Emails (Only if I am an approver). A checkbox for "Generate new password and notify user immediately" is checked.
- Buttons:** Save, Save & New, Cancel.

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

This screenshot is identical to the first one, except for the address information filled in the "Mailing Address" section:

- Mailing Address:** Street: 41/94, Ariyampalayam, Uthamasholapuram .., City: SALEM, Zip/Postal Code: 636308, State/Province: TAMIL NADU, County: .
- All other settings (Single Sign On Information, Locale Settings, Approver Settings, and Buttons) remain the same.

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

User Detail

Name: madhu b  
Alias: mb  
Email: 2k20csit179@kiot.ac.in [Verify] [\(i\)](#)  
Username: 2k20csit@kiot.ac.in  
Nickname: User16961684242855419206 [\(i\)](#)  
Title: worker  
Company: kiot bank  
Department: Sales  
Division:   
Address: 41/34, arayampalayam, utthamasapuram, , Paraiakkadu , salem- 636308  
Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata)  
Locale: English (India)  
Language: English  
Delegated Approver:  
Manager:  
Receive Approval Request Emails: Only if I am an approver  
Federation ID:  
App Registration: One-Time Password Authenticator  
Edit | Sharing | Reset Password | Login | Freeze | User ProfileHelp for this Page [\(i\)](#)

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

Inbox 5,318

Welcome to Salesforce!

Click below to verify your account.

[Verify Account](#)

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

Username:  
2k20csit@kiot.ac.in

Again, welcome to Salesforce!

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

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

**salesforce**

## Change Your Password

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

- 8 characters
- 1 letter
- 1 number

\* New Password  
..... Good

\* Confirm New Password  
..... Match

Security Question  
In what city were you born?

\* Answer  
india

Change Password

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

Recently Viewed | Bank | Salesforce

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

**MECW**

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.

New

Search...

List View

Recently Viewed | customers | S | +

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

MECW

customers Bank customers Home

Search...

Recently Viewed

0 items • Updated a few seconds ago

customer Name

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

List View

(9) WhatsApp | (1) Salesforce Developer Session | (128) Top Hits 2023 | (1) Permission Sets | Salesforce | (1) Welcome to Salesforce: V | (1) Reset Password | Salesforce | +

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

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

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

All Permission Sets | Edit | Delete | Create New View

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

1-25 of 29 | 0 Selected |

Previous Next | Page 1 of 2

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

## Step 2:

### Permission Sets:

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

### Object-Level Security:

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

### Record-Level Security:

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

### Ownership:

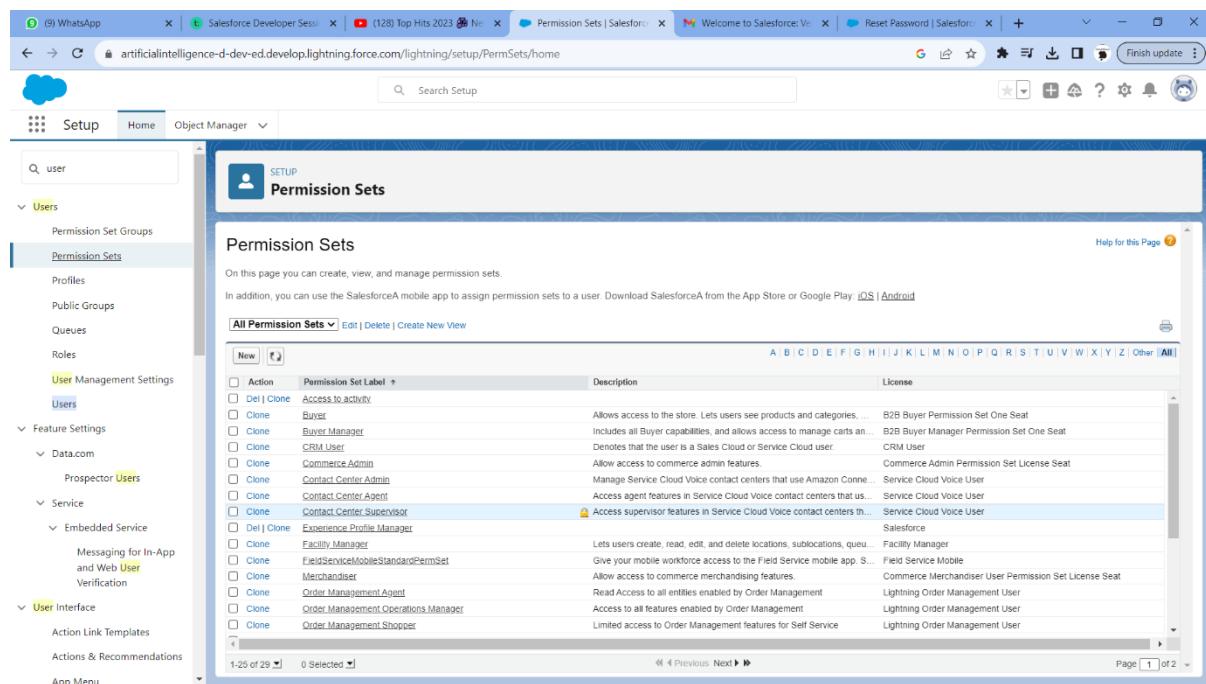
- Ensure that the Account records are owned by the respective users, with User A owning their records and User B owning their records.

## Organization-Wide Defaults:

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

## Testing:

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



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

- Page Title:** Permission Sets
- Section:** Permission Sets
- Sub-section:** All Permission Sets
- Table Headers:** Action, Permission Set Label, Description, License
- Table Data:** A list of permission sets including:
  - Access\_to\_Activity
  - Buyer
  - Buyer\_Manager
  - CRM\_User
  - Commerce\_Admin
  - Contact\_Center\_Admin
  - Contact\_Center\_Agent
  - Contact\_Center\_Supervisor
  - Experience\_Profile\_Manager
  - Facility\_Manager
  - FieldServiceMobileStandardPermSet
  - Merchandiser
  - Order\_Management\_Agent
  - Order\_Management\_Operations\_Manager
  - Order\_Management\_Shopper
- Page Navigation:** Search bar, Help for this Page, Alphabetical navigation (A-Z), Page 1 of 2.

The screenshot shows the Salesforce Setup interface with the 'Permission Sets' section selected. A sub-menu for 'Users' is open, showing options like 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', and 'Users'. The 'Permission Sets' option is highlighted. The main content area displays the 'Create' page for a new permission set. The 'Enter permission set information' section includes fields for 'Label' (set to ' '), 'API Name' (set to ' '), and 'Description'. Below this, a note about session activation is present. The 'Select the type of users who will use this permission set' section contains a note about who will use the permission set and three options: 'Choose --None--', 'Choose a specific user license', and 'Choose a specific permission set license'. A note about license assignment follows. The 'License' dropdown is set to 'None'. At the bottom right of the form are 'Save' and 'Cancel' buttons.

This screenshot is identical to the one above, but with different input values. In the 'Label' field, the value 'salesmanager' has been typed. In the 'API Name' field, the value 'salesmanager' has also been typed. The rest of the page, including the description, session activation, user selection, and license dropdown, remains the same as in the first screenshot.

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

**Left Sidebar:**

- Search bar: Search Setup
- Setup icon
- Home
- Object Manager
- User Management Settings (selected)
- Users (selected)
- 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

**Right Panel - Permission Set Overview:**

Description	License	API Name	Namespace Prefix
Session Activation Required		salesmanager	
Last Modified By	GOPAL_S_01/10/2023, 7:29 pm		

**Right Panel - Apps:**

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

Screenshot of the Salesforce Setup interface showing the 'Permission Sets' page for the 'salesmanager' permission set, with the 'Object Settings' tab selected.

**Left Sidebar:**

- Search bar: Search Setup
- Setup icon
- Home
- Object Manager
- User Management Settings (selected)
- Users (selected)
- 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

**Right Panel - Object Settings:**

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

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

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

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

The main content area displays the 'Permission Set' details for 'salesmanager'. The 'Object Permissions' section includes:

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 includes:

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

URL: <https://artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0P55j000008Phok%3Fs%3DEntityPermissions%26o%3D...>

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

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

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

The main content area displays the 'Permission Set' details for 'salesmanager'. The 'Object Permissions' section includes:

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 includes:

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

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

Setup Home Object Manager

Search Setup

User salesmanager

Current Assignments

No assignments defined.

Icon: Cactus and clouds

Buttons: Edit, Delete, Add Assignment

Left sidebar:

- 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

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

Setup Home Object Manager

Search Setup

Select Users to Assign

All Users

1 item selected

Full Name ↑	All... ↓	Username	Role	Ac... ↓	Profile
Amelia Ellington	aelli	amelia.ellington.146kxcp9o0idh.d6cwpdcu04wh.hnbdwmvvhwhq.wguctpr1dalv@gmail.com	<input checked="" type="checkbox"/>		Force.com - App Subscription User
Chatter Expert	Chatty	chatty.00d5j00000bcskkeab.lo0bfwmpqike@chatter.salesforce.com	<input checked="" type="checkbox"/>		Chatter Free User
Diya Adanna	dadian	test_diya_pas.4w8bjyb9wik.tszrgsbkpx.3gi8ofovzwns.hl43bkzw6mea@gmail.com	<input checked="" type="checkbox"/>		UMS User
GOPAL S	GS	kiot520@gmail.com	<input checked="" type="checkbox"/>		System Administrator
Integration User	integ	integration@00d5j00000bcskkeab.com	<input checked="" type="checkbox"/>		Analytics Cloud Integration User
madhu b	mb	2k20csit@kiot.ac.in	<input checked="" type="checkbox"/>		salesmanage
Security User	sec	insightssecurity@00d5j00000bcskkeab.com	<input checked="" type="checkbox"/>		Analytics Cloud Security User
sowmya bala	sbala	2k21it@kiot.ac.in	<input checked="" type="checkbox"/>		Manager

Buttons: Search this list..., Next, Cancel

Left sidebar (same as previous screen):

Salesforce Developer Session - artificialintelligence-d-dev-ed.lightning.force.com

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 Done Assign

The screenshot shows the 'Select an Expiration Option For Assigned Users' dialog in Salesforce Setup. The 'No expiration date' option is selected. A table lists a single user, 'madhu b', assigned to the 'salesmanager' profile, with the 'User License' set to 'Salesforce Platform' and 'Expires On' set to 'Never Expires'. The 'Assign' button is visible at the bottom right.

Salesforce Developer Session - artificialintelligence-d-dev-ed.lightning.force.com

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

The screenshot shows the 'Assignment Summary' page after permission set assignment. It displays a table with one row for 'madhu b', assigned to 'Salesforce Platform' with a status of 'Success'. The 'Done' button is visible at the bottom right.

Recently Viewed | customers | [S](#) [+](#)

Recently Viewed | customers | [S](#) [+](#)

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

MECW

mebw Bank customers Home

Search...

Recently Viewed

0 items • Updated a few seconds ago

customer Name

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

LIST VIEW CONTROLS

New

- Clone
- Rename
- Sharing Settings
- Show List Filters
- Select Fields to Display
- Delete
- Reset Column Widths

javascript:void(0)

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

Solution:

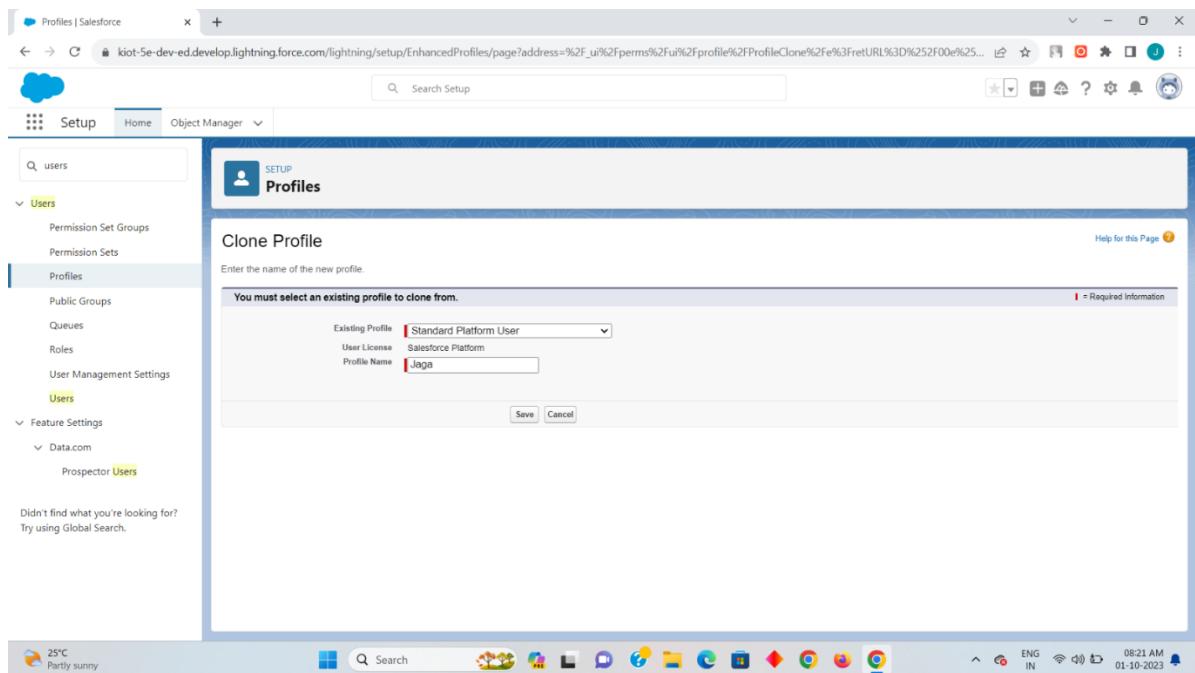
Step 1: we need create a profile for the two user which has the access to Create, Read, Edit for follow as per.

Setup-quick search[profile]

The screenshot shows the Salesforce Setup interface for managing Profiles. The left sidebar includes sections for Permission Set Groups, Permission Sets, Profiles (selected), Public Groups, Queues, Roles, User Management Settings, Users (selected), Feature Settings, and Data.com. A note at the bottom says "Didn't find what you're looking for? Try using Global Search." The main content area is titled "Profiles" and shows a table of existing profiles. The columns are "Action", "Profile Name", "User License", and "Custom". The "User License" column contains various license types like Analytics Cloud Integration User, Authenticated Website, Chatter External, Chatter Free, 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, and Customer Community Plus. The "Custom" column indicates which profiles are custom-built, with several checked off. Navigation buttons at the bottom include "Page 1 of 2".

## Step 2:

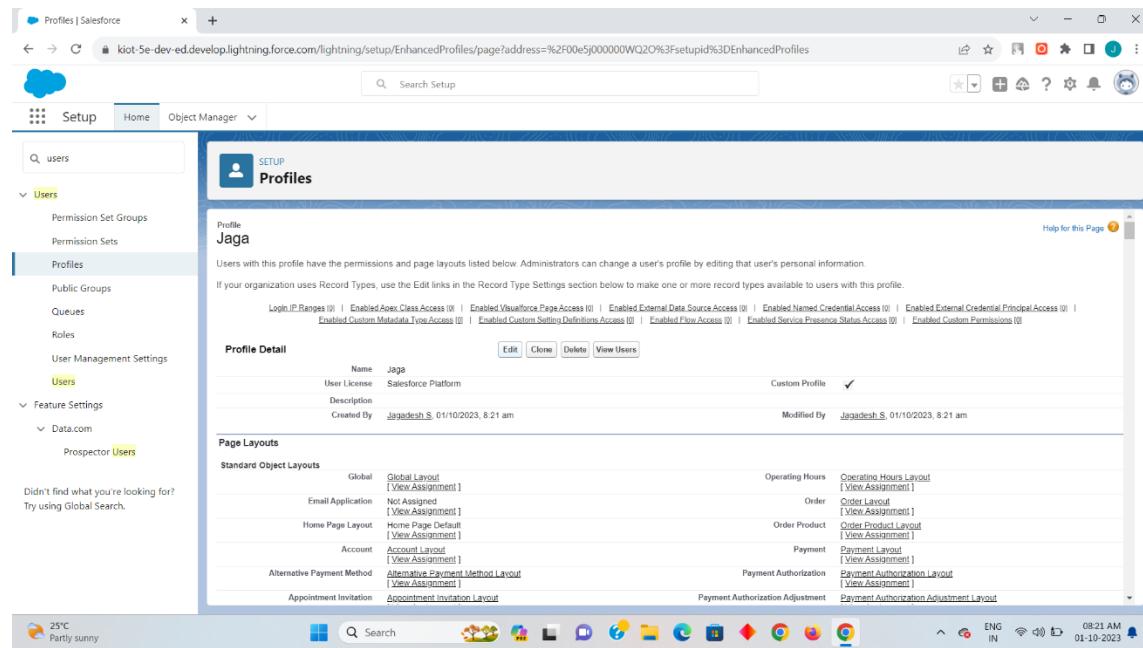
Click on the new to create a new profile along with the label and Api



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%3Fr?url%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 Subscription Consent Types

	Communication Subscription Consents	Communication Subscription Timings	Contacts	Contact Point Addresses	Contact Point Consents	Contact Point Emails	Locations	Party Consents	Push Topics	Sellers	Streaming Channels	User External Credentials
Basic Access	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>					
Create	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>					
Edit	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>					
Delete	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>					
View All	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>					
Modify All	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>					

Custom Object Permissions

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

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Enable different Experience Cloud login policies for employees.

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

25°C Partly sunny

Search

ENG IN 08:21 AM 01-10-2023

Profiles | Salesforce

kiot-5e-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j00000WQ2O%2Fe%3Fr?url%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

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SETUP Profiles

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Create	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>					
Edit	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>					
Delete	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>					
View All	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>					
Modify All	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>					

Custom Object Permissions

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

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

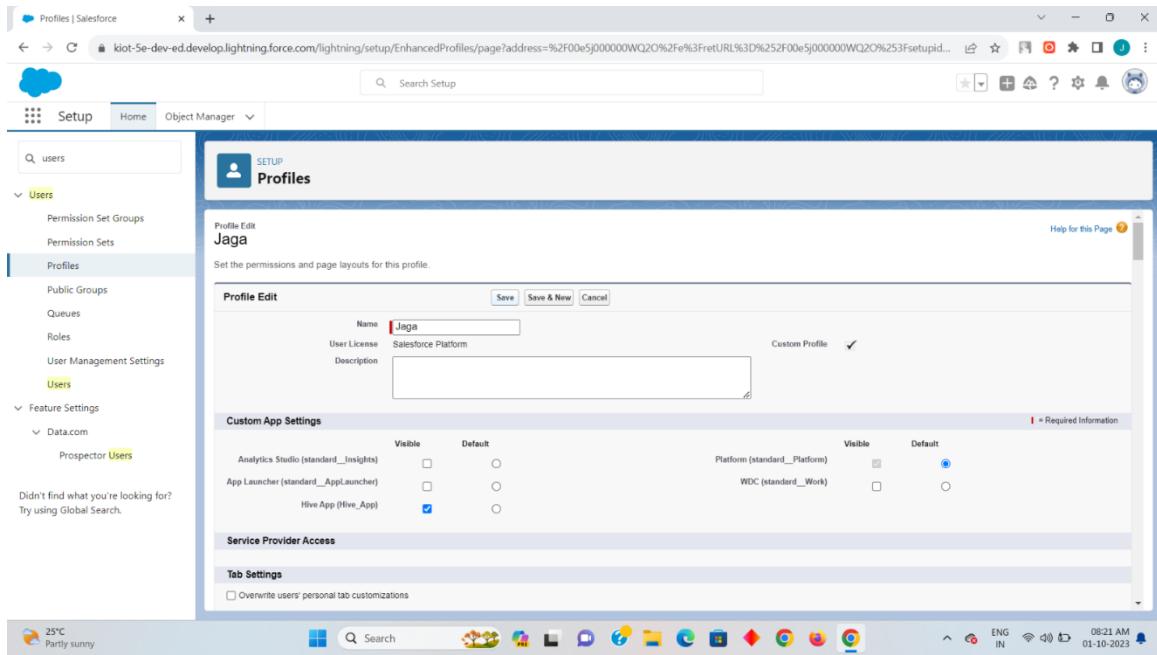
Enable different Experience Cloud login policies for employees.

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

25°C Partly sunny

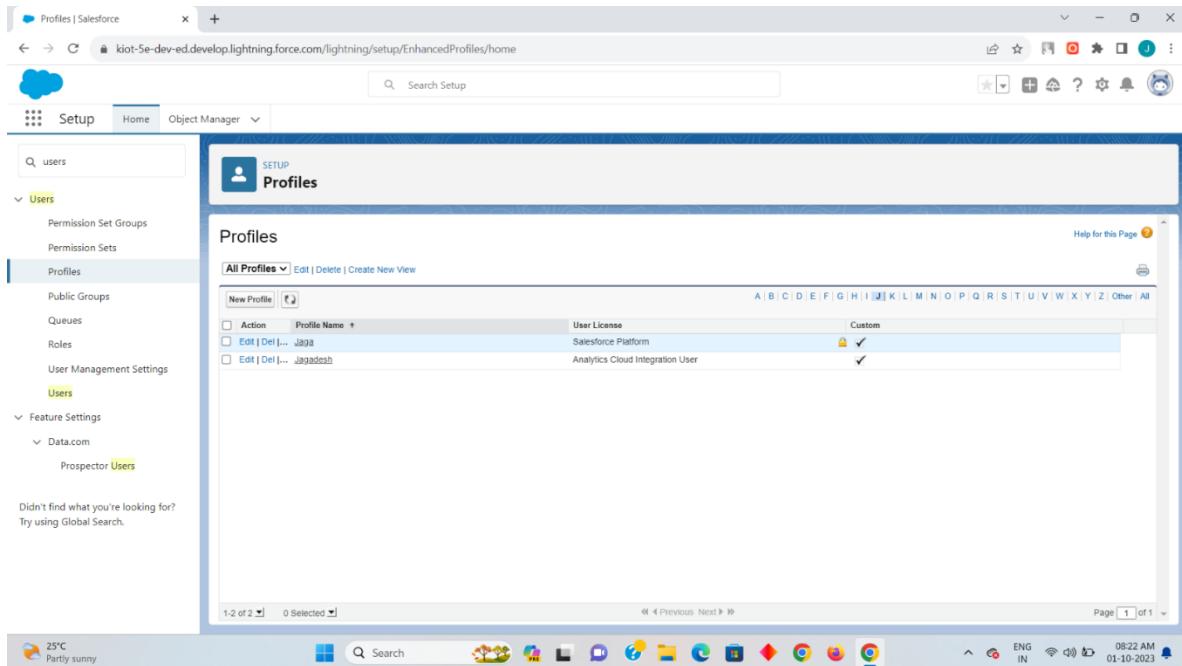
Search

ENG IN 08:21 AM 01-10-2023



## Step 4

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



## Step 5:

Now create two users by enter into the Setup-quick search[user] and then click on new user

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

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> <a href="#">Edit</a>	Chatter Expert	Chatter	chatty@00d500000c0joseaf.6z@bkrkd4i@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> <a href="#">Edit</a>	Grey Jane	jgrey	jane_gray.vgnimmoalm.cz7d2kogt3@gmail.com		<input checked="" type="checkbox"/>	Customer Community User
<input type="checkbox"/> <a href="#">Edit</a>	S_Jaga	JS	jaga096@gmail.com	CEO	<input type="checkbox"/>	Standard Platform User
<input type="checkbox"/> <a href="#">Edit</a>	S_Jagadesh	JS	w0w@gmail.com	SF Admin	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> <a href="#">Edit</a>	S_Jagadesh	JS	jaga117@gmail.com	Channel Sales Team	<input type="checkbox"/>	Standard Platform User
<input type="checkbox"/> <a href="#">Edit</a>	User_Integration	Integ	integration@00d500000c0joseaf.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> <a href="#">Edit</a>	User_Secuthy	sec	insightssecurity@00d500000c0joseaf.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

**New User**

User Edit

General Information

First Name	Jagadesh11
Last Name	S
Alias	S
Email	jwr123@gmail.com
Username	jwr123@gmail.com
Nickname	User169612875144962592
Title	
Company	
Department	
Division	

Role: Director, Channel Sales  
User License: Salesforce Platform  
Profile: Standard Platform User  
Marketing User:

**New User**

User Edit

General Information

First Name	Jagadesh22
Last Name	S
Alias	S
Email	jaat1@gmail.com
Username	jaat1@gmail.com
Nickname	User169612879963616745
Title	
Company	
Department	
Division	

Role: Marketing Team  
User License: Salesforce Platform  
Profile: Standard Platform User  
Marketing User:

**All Users**

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

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	S	S	jas96@gmail.com	CEO	<input type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	Jagadeesh11	S	jaat1@gmail.com	SE Admin	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Jagadeesh22	S	jaat117@gmail.com	Channel Sales Team	<input type="checkbox"/>	Standard Platform User
<input checked="" type="checkbox"/>	Jagadeesh11	S	jwr123@gmail.com	Director, Channel Sales	<input checked="" type="checkbox"/>	Jaga
<input checked="" type="checkbox"/>	Jagadeesh22	S	jaat1@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Jaat

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

kot-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

Data.com

Prospector Users

Permission Sets

Permission Sets

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

In addition, you can use the Salesforce mobile app to assign permission sets to a user. Download 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 orders.	B2B Buyer Permission Set One Seat
<input type="checkbox"/>	Buyer Manager	Denotes that the user is a Sales Cloud or Service Cloud user.	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/>	CRM User	Allow access to commerce admin features.	CRM User
<input type="checkbox"/>	Commerce Admin	Manage Service Cloud Voice contact centers that use Amazon Connect.	Commerce Admin Permission Set License Seat
<input type="checkbox"/>	Contact Center Admin	Access agent features in Service Cloud Voice contact centers that use Amazon Connect.	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Agent	Access supervisor features in Service Cloud Voice contact centers that use Amazon Connect.	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Supervisor	Access supervisor features in Service Cloud Voice contact centers that use Amazon Connect.	Service Cloud Voice User
<input type="checkbox"/>	Deli Clone	Experience Profile Manager	Salesforce
<input type="checkbox"/>	Facility Manager	Lets users create, read, edit, and delete locations, publications, queues, and more.	Facility Manager
<input type="checkbox"/>	Field Service Mobile Standard Permissions	Give your mobile workforce access to the Field Service mobile app. Standard permissions include basic location, calendar, and navigation.	Field Service Mobile
<input type="checkbox"/>	Merchandise	Allow access to commerce merchandising features.	Commerce Merchandise User Permission Set License Seat
<input type="checkbox"/>	Order Management Agent	Read Access to all entities enabled by Order Management.	Lightning Order Management User
<input type="checkbox"/>	Order Management Operations Manager	Access to all features enabled by Order Management.	Lightning Order Management User

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

1-25 of 30 0 Selected

Page 1 of 2

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

25°C Partly sunny

Search

ENG IN 06:24 AM 01-10-2023

Permission Sets | Salesforce

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

Setup Home Object Manager

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Data.com

Prospector Users

Permission Sets

Permission Set Create

Enter permission set information

Label:  API Name:  Description:   
Session Activation Required:

Select the type of users who will use this permission set

Who will use this permission set?

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

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

License:

Save Cancel

25°C Partly sunny

Search

ENG IN 08:24 AM 01-10-2023

Permission Sets | Salesforce

kot-5e-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2FOPSSj000008Pgt%3FsfdclFrameOrigin%3Dhttps%253A%252F%252Fkot-5e-dev-ed.devel...

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.

25°C Partly sunny

Video Tutorial | Help for this Page

API Name permission12  
Namespace Prefix  
Created By Jagadeesh\_S 01/10/2023, 8:24 am

Permission Set Overview

Description License Session Activation Required Last Modified By Jagadeesh\_S 01/10/2023, 8:24 am

Apps

Assigned Apps  
Assigned Connected Apps  
Select Settings  
App Permissions  
Apex Class Access  
Visualforce Page Access  
External Data Source Access

08:24 AM 01-10-2023 ENG IN

Permission Sets | Salesforce

kot-5e-dev-ed.develop.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

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

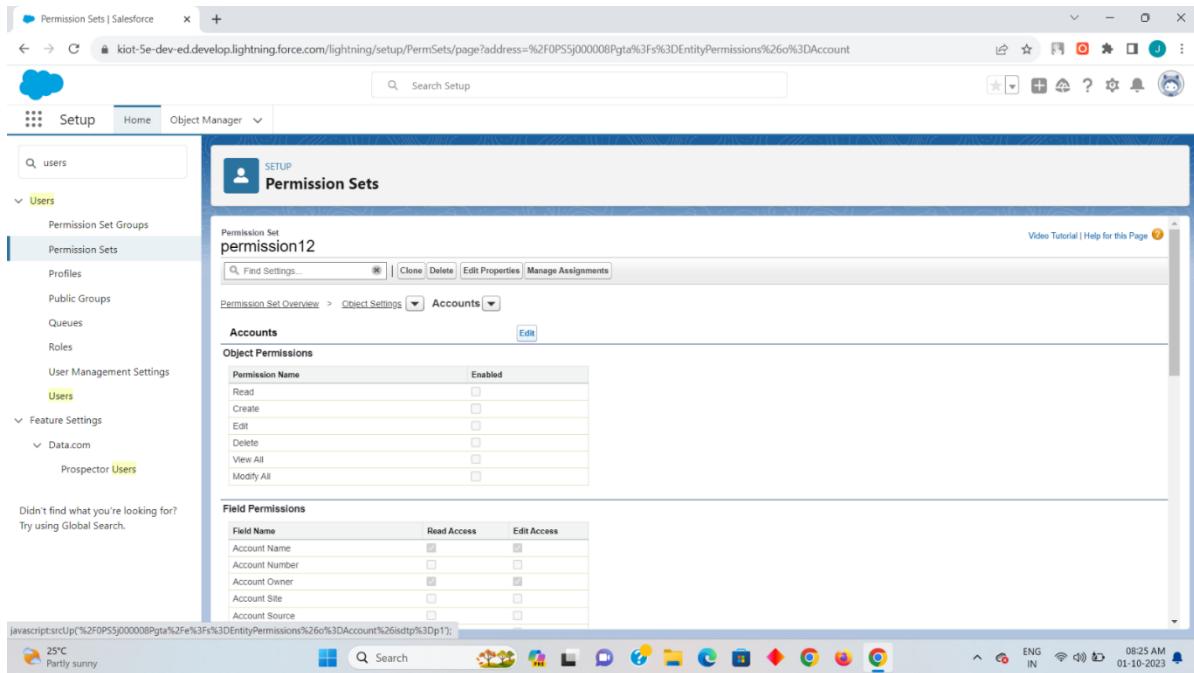
25°C Partly sunny

Video Tutorial | Help for this Page

Object Settings

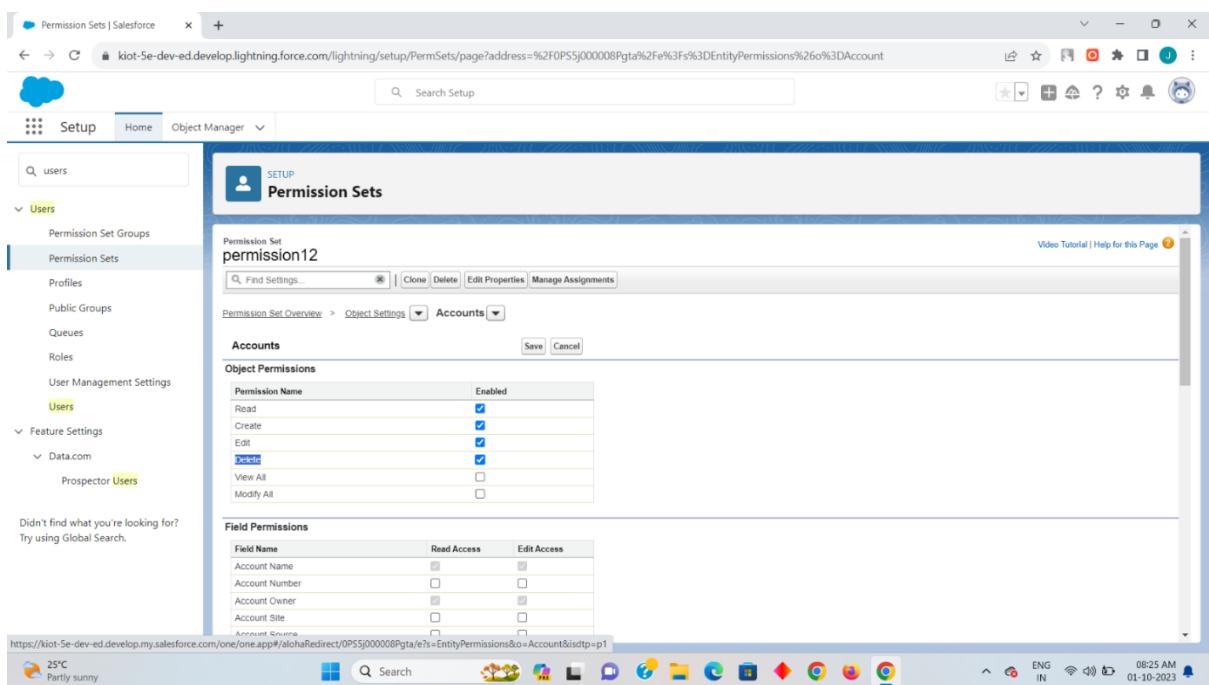
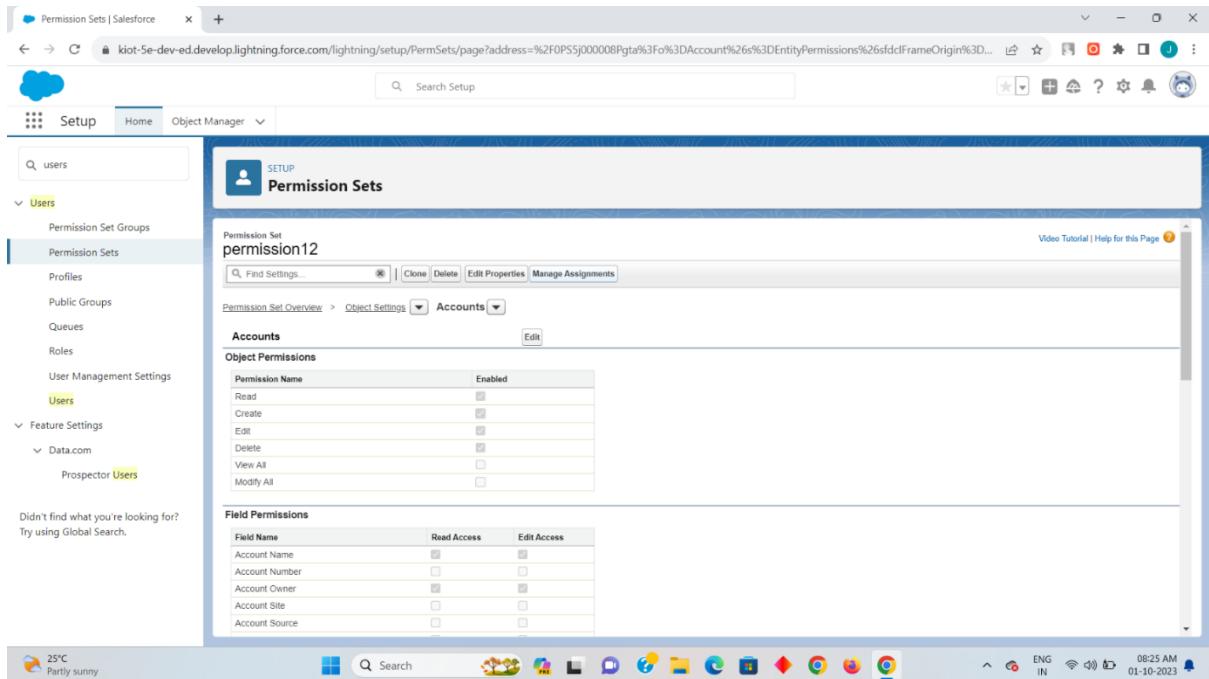
Object Name	Object Permissions	Total Fields	Tab Settings
Account Brands	No Access	9	--
Accounts	No Access	44	--
AI Insight Reasons	No Access	--	--
AI Record Insights	No Access	--	--
Alternative Payment Methods	No Access	27	--
API Anomaly Event Stores	No Access	14	--
App Analytics Query Requests	No Access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

08:25 AM 01-10-2023 ENG IN



## Step 7:

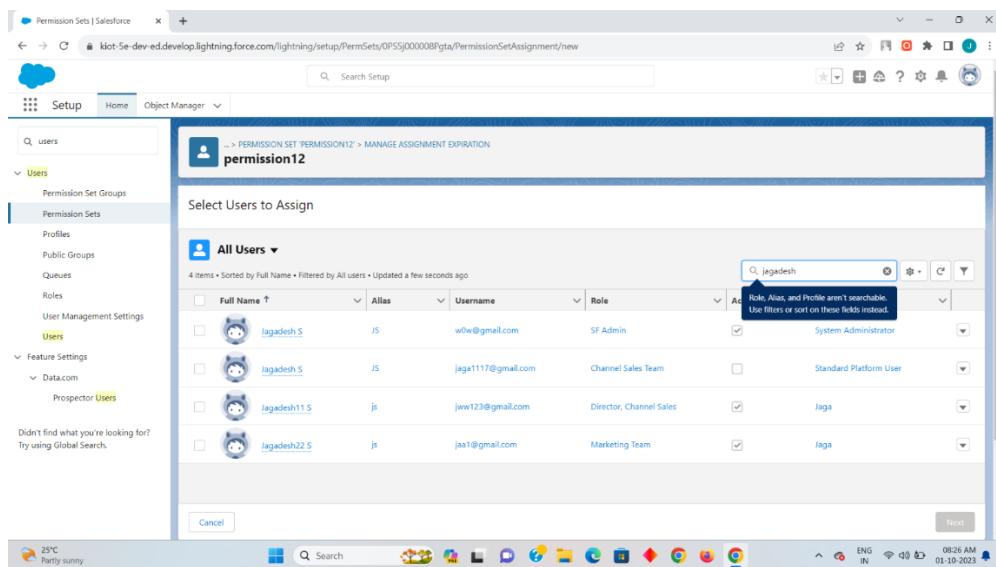
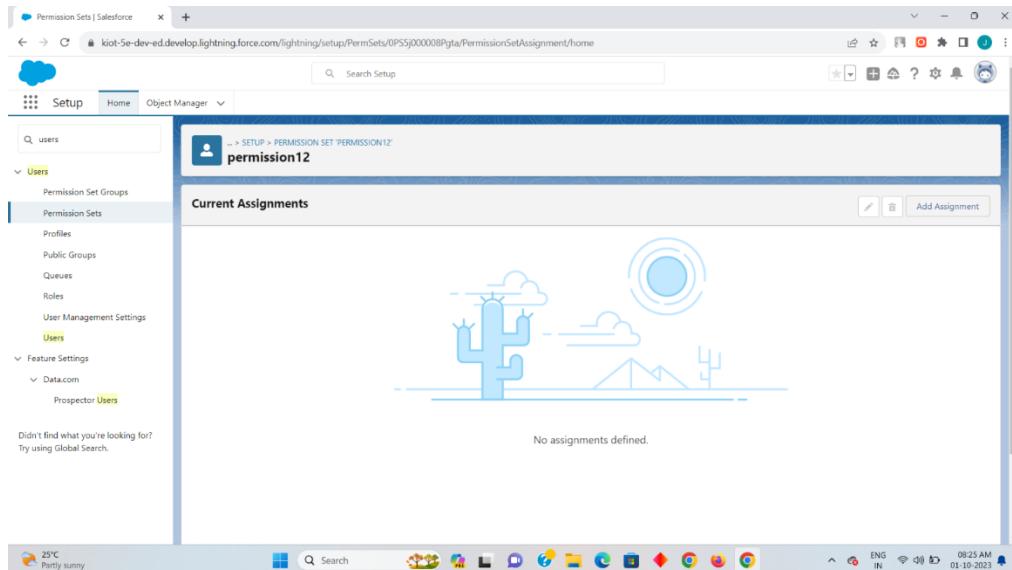
Now to give the specific delete access to the user click on edit on the Account and then enable the read,create,edit and the delete on it so that the permission set will have a specific special access on it. once it has been done click on save and then click on manage assignment.



## Step 8

Now click on add assignment there you will find your two created users click on any one user to give a special access as delete on it

and then click on assign so that the specific selected user can have a special access as delete on it.

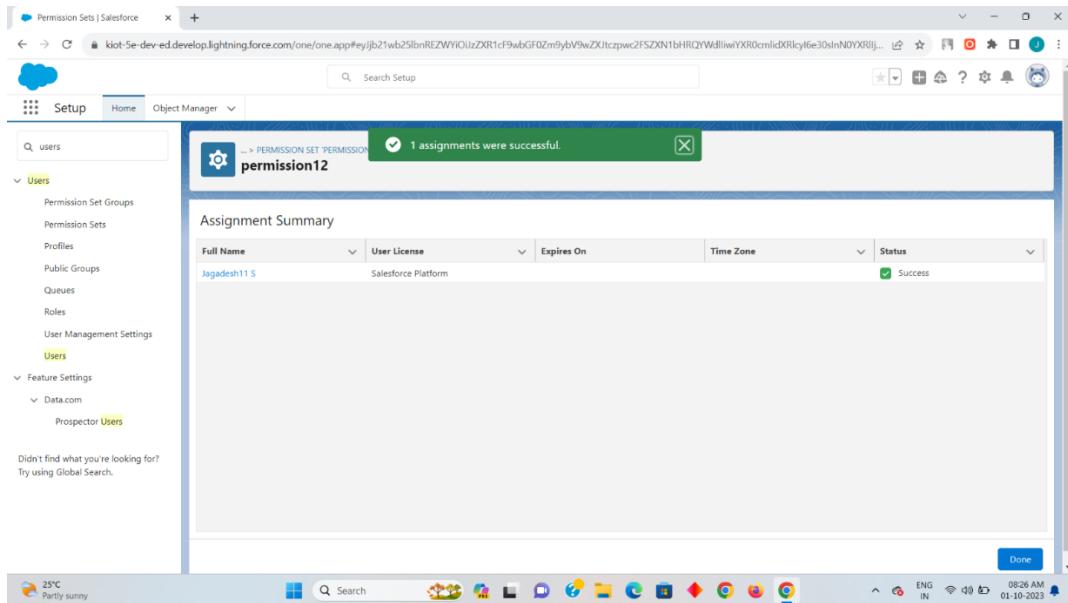


The screenshot shows the Salesforce Setup interface for managing permission set assignments. The left sidebar is collapsed, and the main area displays a list of users under the 'Users' section. A specific user, 'Jagadesh11 S', is highlighted with a checkmark. The interface includes a search bar at the top and a navigation bar at the bottom.

Click on next.

The screenshot shows the continuation of the permission set assignment process. It asks for an expiration option for the assigned users. The 'No expiration date' radio button is selected. Below this, there is a table showing the selected user 'Jagadesh11 S' with their details and an 'Expires On' field set to 'Never Expires'. The interface includes a search bar at the top and a navigation bar at the bottom.

Now click on Assign.



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

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

Solution:

Step 1: Create a Custom Object

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

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

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

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

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

# screenshot.

The screenshot shows the Salesforce Email Template page for a template named "Thank You Email - Survey".

**Details Tab:**

- Email Template Name: Thank You Email - Survey
- Description: Made in Email Template Builder
- Related Entity Type: Survey Result
- Folder: Public Email Templates

**Message Content Tab:**

- Subject: Thank You For Completing Our Survey!
- HTML Value:

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

**Additional Information:**

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

## Step 3: Create an Email Alert

1. Click **Setup**.
2. In the Quick Find box, type **Email Alerts**.
3. Select **Email Alerts**, click on the **New**

## Email Alert button.

4. Name the Email Alert and click the Tab button. The Unique Name will populate.
5. For Object select Survey Result.
6. For the Email Template chooses Lightning Email Template Thank You Email – Survey.
7. For Recipient Type select Email Field: Email.
8. Click Save.

Edit Email Alert  
Survey - Thank You Email

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

Description: Survey - Thank You Email

Unique Name: Survey\_Thank\_You\_Email

Object: Survey Result

Email Template: Thank You Email - Survey

Protected Component:

Recipient Type: User

Recipients:

Available Recipients	Selected Recipients
User: Integration User User: Rakesh Gupta User: Security User	Email Field: Email

Add  Remove

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

Additional Emails:

From Email Address: Current User's email address

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

Save | Save & New | Cancel

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

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

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

1. Drag-and-drop the **Create Records** element onto the Flow designer.
2. Enter a name in the **Label (Save Response)** field; the **API Name** will auto-populate.
3. For **How Many Records to Create** – select **One**.

4. For How to Set the Record Fields
  - select Use separate resources, and literal values.
5. Select the Survey\_Result\_\_c object from the dropdown list.
6. Set Field Values for the Survey Result
  1. Row 1:
    1. Field: Comment\_\_c
    2. Value: {!Comment}
  2. Click Add Row
  3. Row 2:
    1. Field: Email\_\_c
    2. Value: {!Email.value}
  4. Click Add Row
  5. Row 3:
    1. Field: Name\_\_c
    2. Value: {!Name.firstName}  
{!Name.lastName}
  6. Click Add Row
  7. Row 3:
    1. Field: Rating\_\_c
    2. Value: {!Rating}
7. Click Done.

Edit Create Records

Create Salesforce records using values from the flow.

\* Label: Save Response \* API Name: Save\_Response

Description:

How Many Records to Create  
 One  
 Multiple

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

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

Set Field Values for the Survey Result

Field	Value
Comment__c	<input type="text"/> A_a Comment X
Email__c	<input type="text"/> A_a Email > Value X
Name__c	<input type="text"/> (!Name.firstName) (!Name.lastName)
Rating__c	<input type="text"/> A_a Rating X
<a href="#">+ Add Field</a>	
<input type="checkbox"/> Manually assign variables	

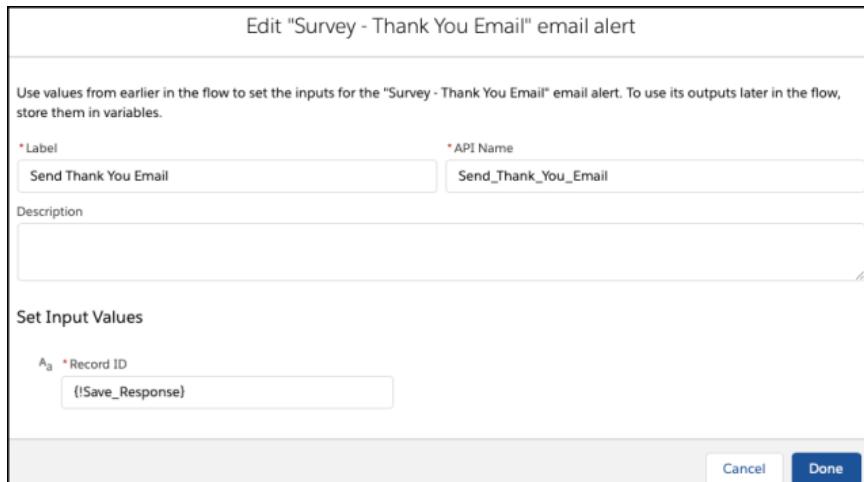
Cancel Done

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

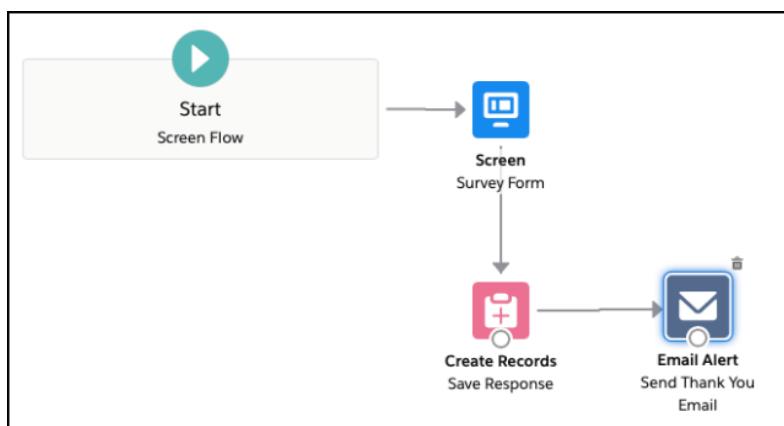
The next step is to call the **Survey – Thank You Email** email alert from flow so that when flow fires it triggers the thank you email to survey participants.

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

- 4. Clicks on the Survey – Thank You Email email alert.**
- 5. Click Done.**



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



- 1. Click Save.**
- 2. Enter Flow Label the API Name will auto-populate.**
- 3. Click Show Advanced.**
- 4. How to Run the Flow: User or System Context—Depends on How Flow is**

## Launched

5. Type: Screen Flow
6. API Version for Running the Flow: 51
7. Interview Label: Survey  
{\$Flow.CurrentDateTime}
8. Click Save.

Save as

[A New Version](#) [A New Flow](#)

\* Flow Label: Survey

\* Flow API Name: Survey

Description:

Hide Advanced

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

\* Type: Screen Flow

\* API Version for Running the Flow: 51

Interview Label: Survey {\$Flow.CurrentDateTime}

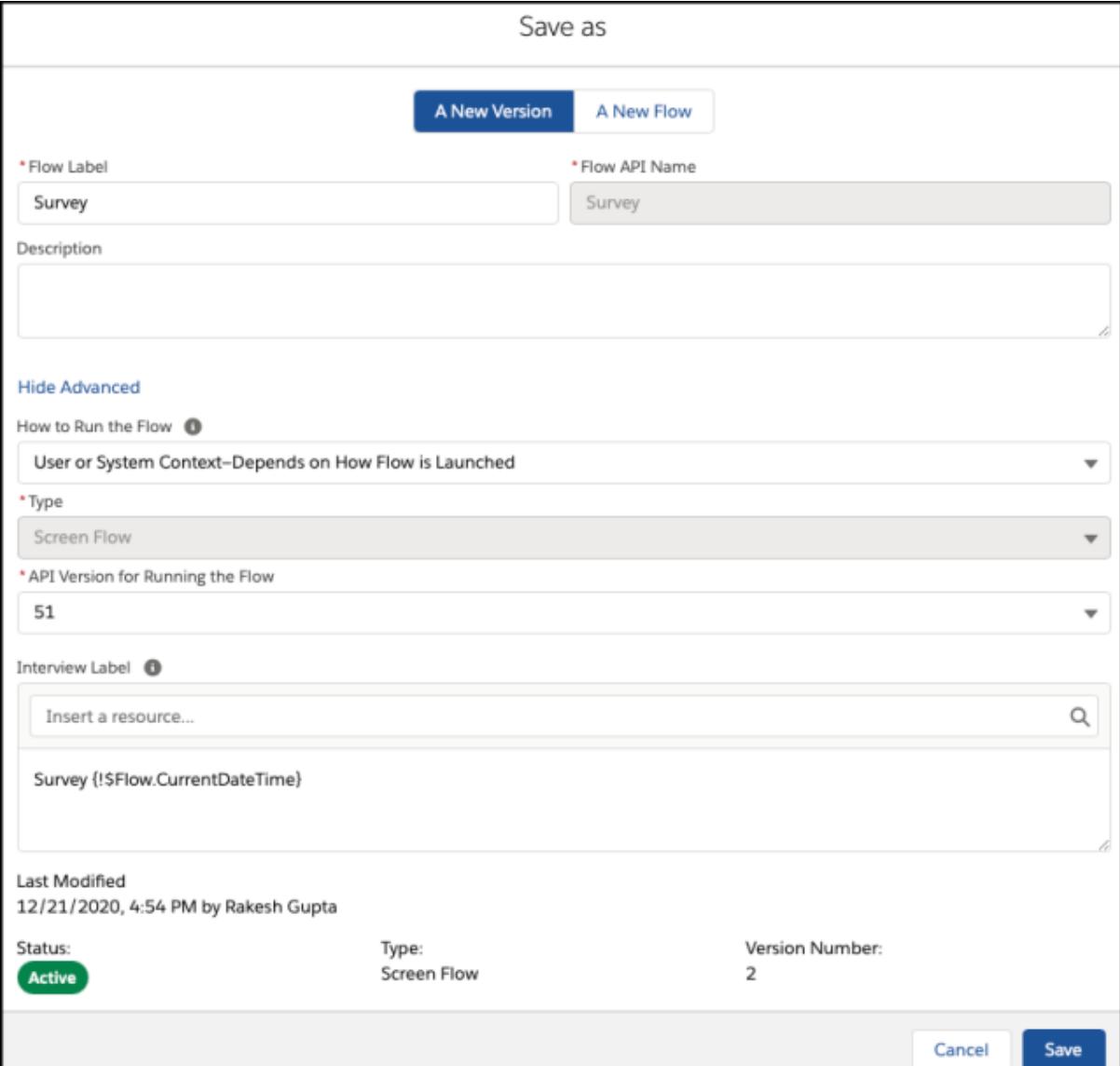
Last Modified: 12/21/2020, 4:54 PM by Rakesh Gupta

Status: [Active](#)

Type: Screen Flow

Version Number: 2

[Cancel](#) [Save](#)

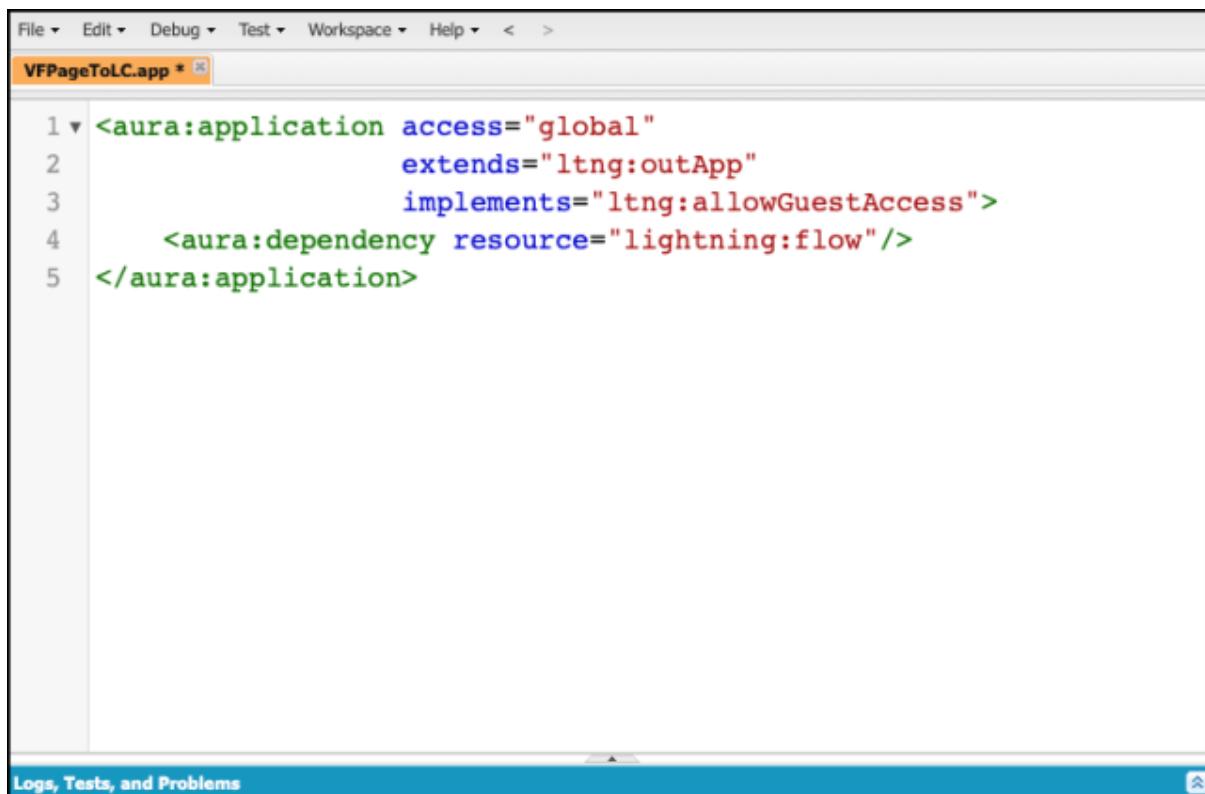


Step 5: Create a Lightning Application to Render Lightning Runtime for Flow in a

## Visualforce Page

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

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



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

- Toolbar:** File, Edit, Debug, Test, Workspace, Help.
- Code Editor:** The file is named "VFPageToLC.app". The code is as follows:

```
1 <aura:application access="global"
2         extends="ltng:outApp"
3         implements="ltng:allowGuestAccess">
4             <aura:dependency resource="lightning:flow"/>
5         </aura:application>
```
- Status Bar:** Logs, Tests, and Problems.

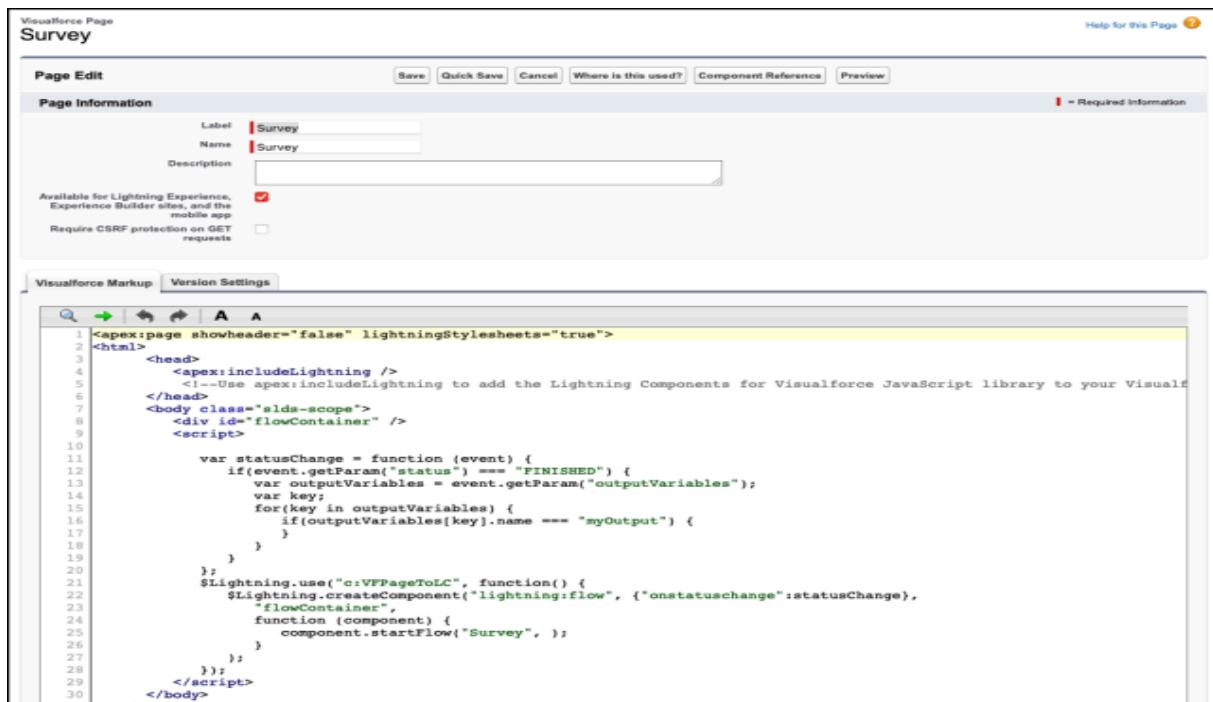
## Step 6: Create a Visualforce Page and Embed Your Flow Into It

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

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

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

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



The screenshot shows the Visualforce Page Editor for a page named "Survey". The "Page Information" section includes fields for Label (Survey), Name (Survey), and Description. It also has checkboxes for "Available for Lightning Experience, Experience Builder, and the mobile app" (checked) and "Require CSRF protection on GET requests" (unchecked). Below this is the "Visualforce Markup" tab, which contains the following Apex code:

```
<apex:page showheader="false" lightningStylesheets="true">
<head>
<apex:includeLightning />
<!--Use apex:includeLightning to add the Lightning Components for Visualforce JavaScript library to your Visualforce page-->
</head>
<body class="slds-scope">
<div id="flowContainer" />
<script>
var statusChange = function (event) {
    if(event.getParam("status") === "FINISHED") {
        var outputVariables = event.getParam("outputVariables");
        var key;
        for(key in outputVariables) {
            if(outputVariables[key].name === "myOutput") {
                }
            }
        }
    };
$cVFPageToLC", 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 the Salesforce interface. 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. Key settings visible include:

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

**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!    

 Survey Site Guest User via b9amq6fe7r.b-cdzwmaa.gs0.bnc.salesforce.com  
to me 

8:09 PM (1 minute ago)   

Hi Alok Sinfal,

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

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

Thanks,  
Automation Champion