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Salesforce
Developer(Course)
Assignment no 1**

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Batch : 2024
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1.Create a Master-Detail Relationship between two Custom objects and also create a Roll Up Summary Field to Calculate total number of records.

Solution:

Step 1: Create Custom Objects

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

New Custom Object

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

Custom Object Definition Edit

Custom Object Information

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

Label	college	Example:	Account
Plural Label	colleges	Example:	Accounts

Starts with vowel sound

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

Object Name	college	Example:	Account
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Description

Context-Sensitive Help Setting

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

Content Name

Record Name

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

Record Name	College Name	Example:	Account Name
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Data Type

Optional Features

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

Object Classification

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

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

Deployment Status

In Development

What is this?

Deployed

Search Status

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

Allow Search

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

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

Save Save & New 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):

Description	Enable Reports
API Name CDepartment__c	Track Activities
Custom ✓	Track Field History
Singular Label CDepartment	Deployment Status Deployed
Plural Label CDepartments	Help Settings Standard salesforce.com Help Window

Buttons: Edit, Delete

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- Scoping Rules
- Triggers
- Flow Triggers
- Validation Rules

Right Panel (New Relationship):

Step 3. Enter the label and name for the lookup field (Step 3 of 6)

Field Label: college

Field Name: college

Description:

Help Text:

Child Relationship Name: CDepartments

Sharing Setting:

- 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

Buttons: Previous, Next, Cancel

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)		

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?	Description
Edit Del	Block1	Box		
Edit Del	Research Proposal	Square		
Edit Del	student	Box		

Web Tabs

No Web Tabs have been defined.

Visualforce Tabs

No Visualforce Tabs have been defined.

Lightning Component Tabs

No Lightning component tabs have been defined.

Lightning Page Tabs

No Lightning Page Tabs have been defined.

Setup > OBJECT MANAGER

college

New Custom Field

Step 5. Add to page layouts

Step 5 of 5

Fields & Relationships

Details

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

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**

Setup > OBJECT MANAGER

college

New Custom Field

Step 4. Establish field-level security

Step 4 of 5

Fields & Relationships

Details

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

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

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 A relationship field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
- Master-Detail Relationship Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:
 - 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.
- External Lookup Relationship Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.
- Boolean Allows users to select a True (checked) or False (unchecked) value.

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-
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Enter a short description

Description

Next Cancel

Lightning Experience App Manager

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

App Name ↑	Developer Name	Description	Last Modified Date	App ...	Visi...
1 All Tabs	AllTabSet	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 note about creating new custom tabs. It lists sections for 'Custom Object Tabs', 'Web Tabs', 'Visualforce Tabs', 'Lightning Component Tabs', and 'Lightning Page Tabs'. Under 'Custom Object Tabs', there is a table with columns 'Action', 'Label', 'Tab Style', and 'Description'. The table contains five rows:

Action	Label	Tab Style	Description
Edit Del	Book1	Box	
Edit Del	Departments	Lightning	
Edit Del	collegea	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

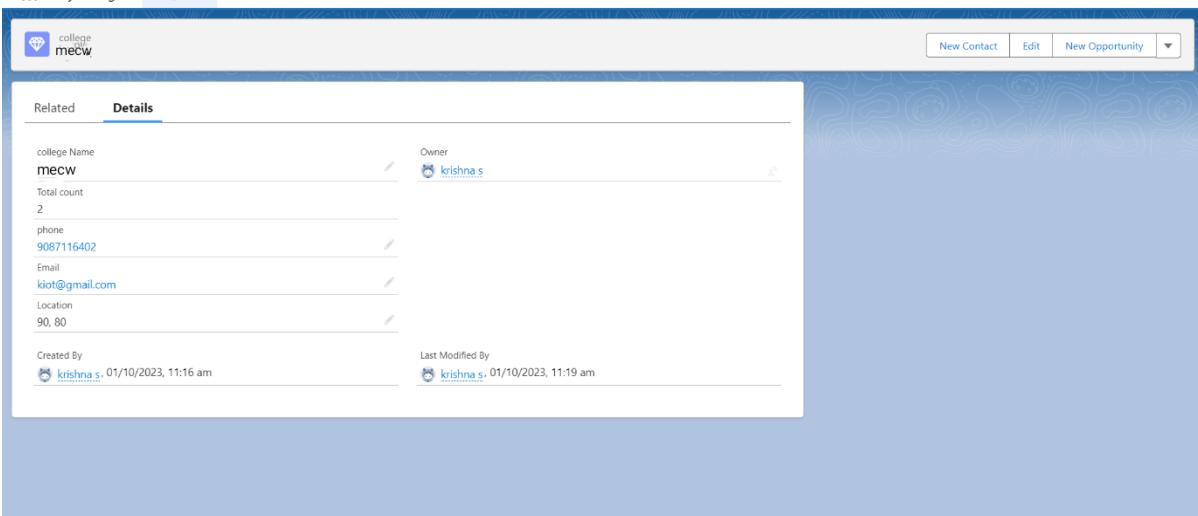
Location
90, 80

Owner
 krishna.s.

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

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

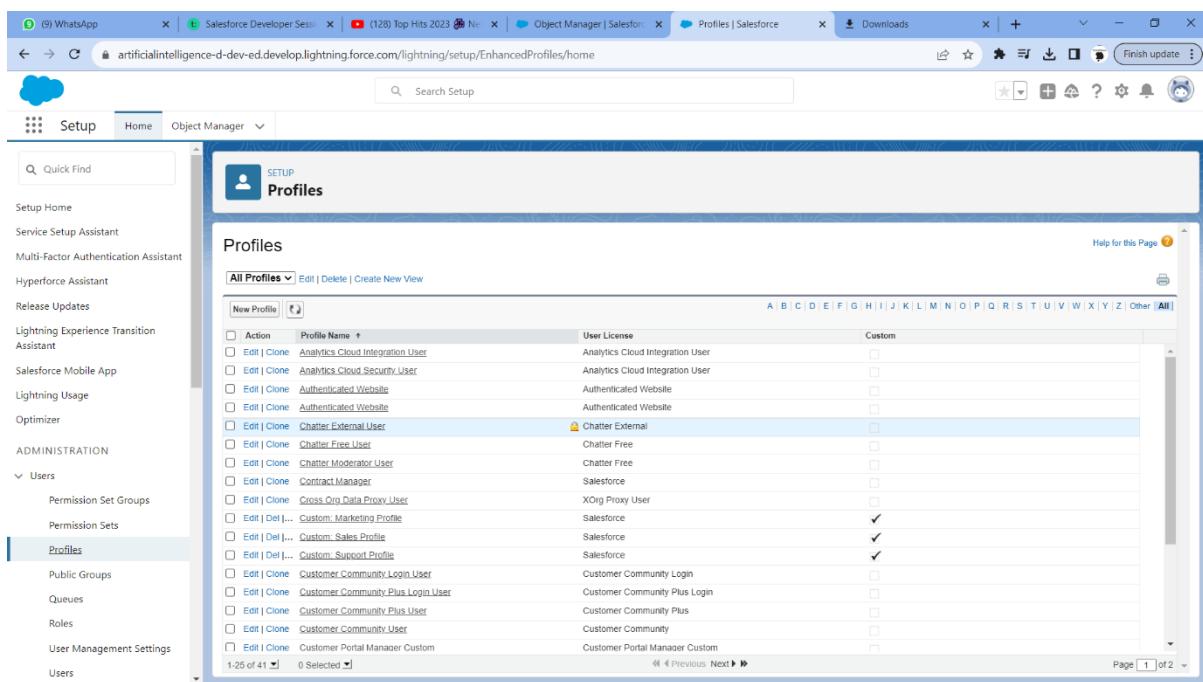
History



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 for managing Profiles. The left sidebar is titled 'SETUP' and includes sections 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. Under ADMINISTRATION, the 'Users' section is expanded, showing sub-options: Permission Set Groups, Permission Sets, Profiles (which is selected and highlighted in blue), Public Groups, Queues, Roles, User Management Settings, and Users.

The main content area is titled 'Profiles' and displays a table of existing profiles. The columns are 'Action', 'Profile Name', 'User License', and 'Custom'. The table lists the following 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"/>

At the bottom of the page, there are navigation links for '1-7 of 7' and '0 Selected', and a 'Page 1 of 1' indicator.

The screenshot shows the 'Clone Profile' page. The left sidebar is identical to the previous screenshot. The main content area is titled 'Clone Profile' and contains the following message: 'Enter the name of the new profile.' Below this, a note says 'You must select an existing profile to clone from.' A table shows the details of the existing profile being cloned: 'Existing Profile: Standard Platform User', 'User License: Salesforce Platform', and 'Profile Name: [redacted]'. At the bottom of the form are 'Save' and 'Cancel' buttons.

The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected. On the left, the navigation menu is expanded under 'ADMINISTRATION' to show 'Users' and its sub-options: 'Permission Set Groups', 'Permission Sets', 'Profiles' (which is selected and highlighted in blue), 'Public Groups', 'Queues', 'Roles', 'User Management Settings', and 'Users'. The main content area displays the 'Clone Profile' screen. It has a header 'Clone Profile' and a sub-header 'Enter the name of the new profile.' Below this, there is a note 'You must select an existing profile to clone from.' A table shows the 'Existing Profile' as 'Standard Platform User', 'User License' as 'Salesforce Platform', and 'Profile Name' as 'Manage'. At the bottom are 'Save' and 'Cancel' buttons.

The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected. The left navigation menu is identical to the previous screenshot, showing the 'Profiles' option as selected. The main content area displays the 'Profile Manager' screen. It has a header 'Profile Manager' and a note '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.' Below this, there are two sections: 'Profile Detail' and 'Page Layouts'. The 'Profile Detail' section includes fields for 'Name' (Manager), 'User License' (Salesforce Platform), 'Description' (Created By: SALESFORCE, Created: 01/10/2023, 7:09 pm), and 'Modified By' (SALESFORCE, Modified: 01/10/2023, 7:09 pm). The 'Page Layouts' section lists various standard object layouts and alternative payment method layouts, each with columns for 'Object', 'Layout', 'Order', 'Under Product', 'Payment', and 'Payment Authorization Adjustment'.

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"/>				

	Basic Access	Create	Edit	Delete	Data Administration
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

Obfuscate secret answer for password resets:

Require a minimum 1 day password lifetime:

Don't immediately expire links in forgot password emails:

Salesforce Developer Session

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"/>				

	Basic Access	Create	Edit	Delete	Data Administration
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

Obfuscate secret answer for password resets:

Require a minimum 1 day password lifetime:

Don't immediately expire links in forgot password emails:

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

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

New User

User Edit Save Save & New Cancel

General Information

First Name	<None Specified>
Last Name	<None Specified>
Alias	<None Specified>
Email	<None Specified>
Username	<None Specified>
Nickname	<None Specified>
Title	<None Specified>
Company	<None Specified>
Department	<None Specified>
Division	<None Specified>

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

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

New User

User Edit Save Save & New Cancel

General Information

First Name	sowmiya
Last Name	bala
Alias	sbala
Email	2k20cse179@kiot.ac.in
Username	2k21it@kiot.ac.in
Nickname	User169616771282564526
Title	worker
Company	kiot bank
Department	<None Specified>
Division	<None Specified>

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

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 'Load Lightning Pages While Scrolling' option is also checked.

The screenshot shows a Gmail inbox with 5,318 messages. A new message from 'support@salesforce.com' is visible, addressed to the user. The email subject is 'Welcome to Salesforce!' and contains a verification link. The message body includes a 'Verify Account' button and a note about saving the URL for later log-in. The signature at the bottom of the email reads '© 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.sal...
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

* = Required Information

Information

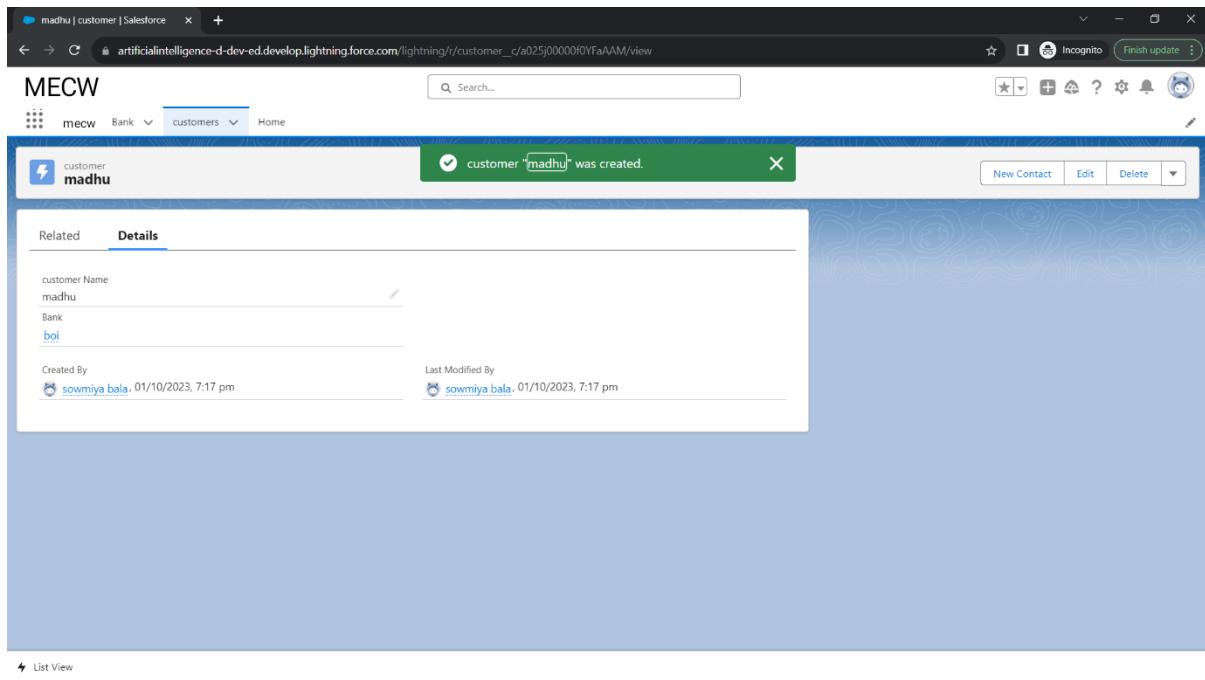
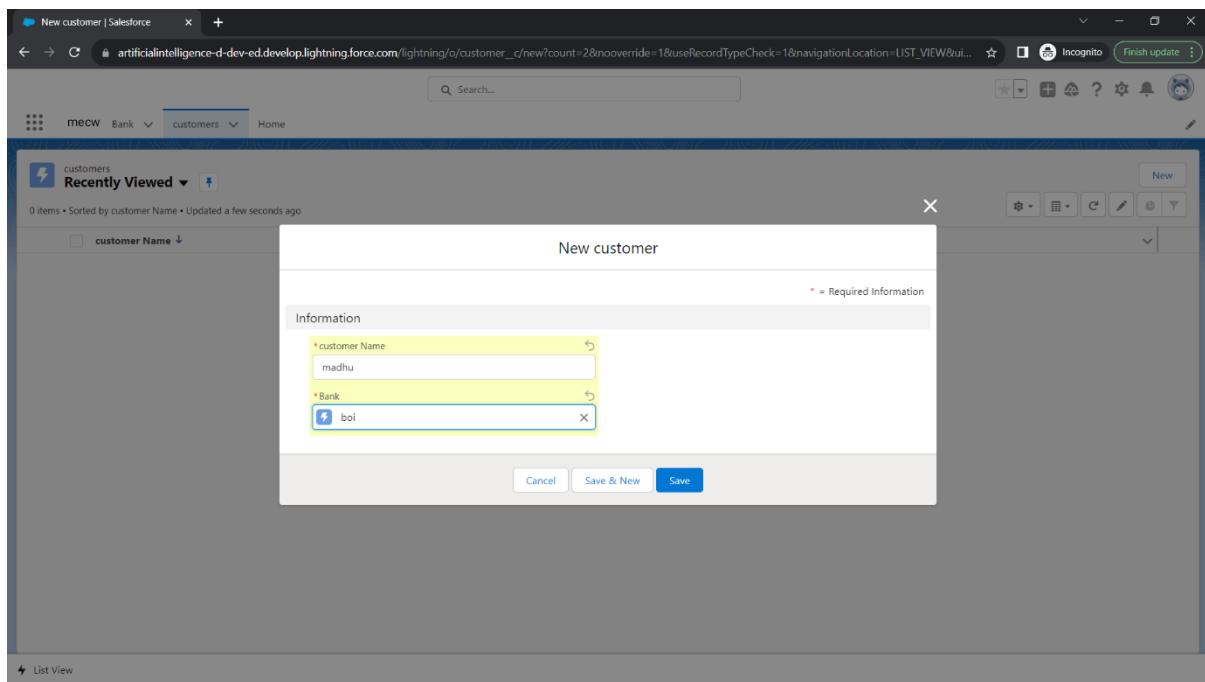
Bank Name: boi

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 options like 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. Under ADMINISTRATION, the 'Users' section is expanded, showing sub-options: Permission Set Groups, Permission Sets, Profiles (which is selected and highlighted in blue), 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 (a red square with an exclamation mark) is shown next to the instruction 'You must select an existing profile to clone from.'. The dialog contains the following fields:

Existing Profile	Standard Platform User
User License	Salesforce Platform
Profile Name	<input type="text" value="salesmanager1"/>

At the bottom of the dialog are 'Save' and 'Cancel' buttons.

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	Product2 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

User Edit

Save Save & New Cancel

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: -None-

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

Accessibility Mode (Classic Only):

High-Contrast Palette on Charts:

Load Lightning Pages While Scrolling:

Debug Mode:

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

User Edit

General Information

User Edit

Save Save & New Cancel

First Name: madhu

Last Name: b

Alias: mb

Email: 2k20cse179@kiot.ac.in

Username: 2k20cse179@kiot.ac.in

Nickname: User169616842428654192

Title: worker

Company: kiot bank

Department: Sales

Division:

Role: <None Specified>

User License: Salesforce Platform

Profile: 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: -None-

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

Accessibility Mode (Classic Only):

High-Contrast Palette on Charts:

Load Lightning Pages While Scrolling:

Debug Mode:

The screenshot shows the Salesforce Setup interface with the 'Users' page selected. The left sidebar navigation includes 'Setup', 'Home', 'Object Manager', and a search bar. Under 'User Management Settings', 'Users' is expanded, showing sub-options: Feature Settings (Data.com, Prospector), Service (Embedded Service, Messaging for In-App and Web User, Verification), and User Interface (Action Link Templates, Actions & Recommendations, App Menu). The main content area displays the 'Users' configuration page with sections for Mailing Address, Single Sign On Information, Locale Settings, and Approver Settings. The 'Mailing Address' section contains fields for Street, City, Zip/Postal Code, State/Province, and County. The 'Single Sign On Information' section includes a Federation ID field. The 'Locale Settings' section shows Time Zone (GMT+05:30 India Standard Time (Asia/Kolkata)), Locale (English (India)), and Language (English). The 'Approver Settings' section includes fields for Delegated Approver, Manager, and Receive Approval Request Emails (set to 'Only if I am an approver'). A checkbox for 'Generate new password and notify user immediately' is checked. At the bottom are 'Save', 'Save & New', and 'Cancel' buttons.

This screenshot is identical to the one above, but with specific address fields populated. The 'Street' field contains '4/194, ariyampalayam, Uthamasholapuram ..', the 'City' field contains 'SALEM', the 'Zip/Postal Code' field contains '636308', the 'State/Province' field contains 'TAMIL NADU', and the 'Country' field is empty. All other settings remain the same as in the first screenshot.

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) Incognito (3) | Finish update

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

Setup

Home Object Manager

Search Setup

Permission Sets

Help for this Page

Permission Sets

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 | 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:

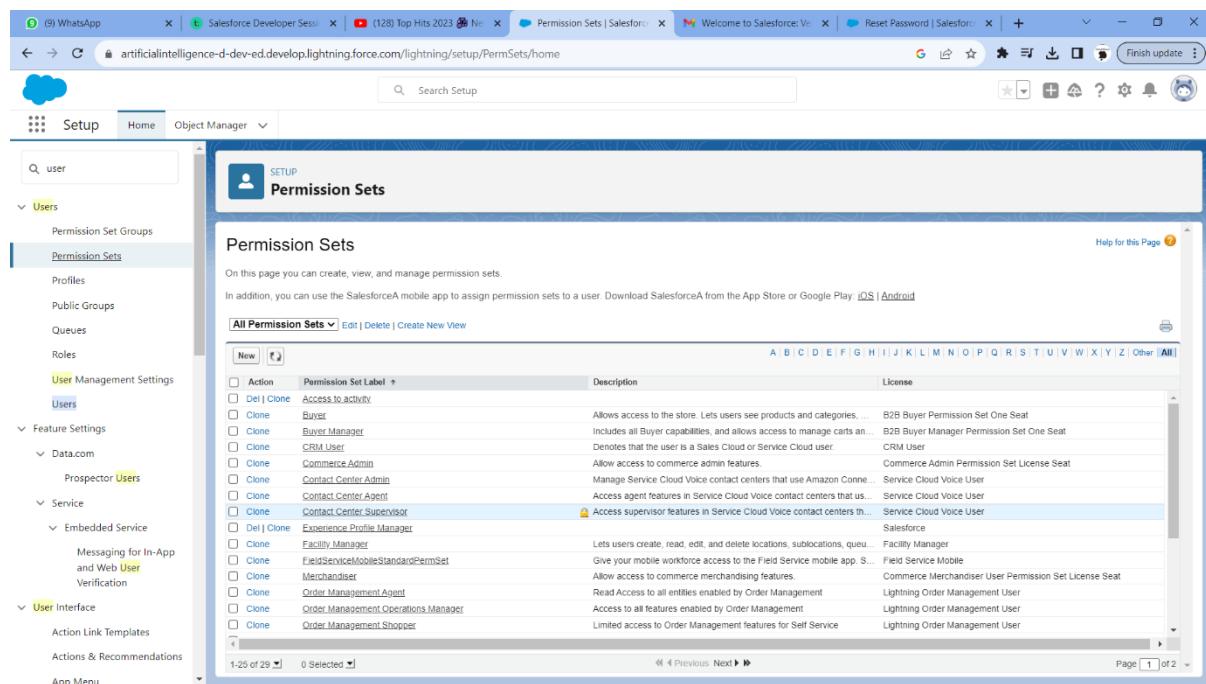
- Ensure that the Account records are owned by the respective users, with User A owning their records and User B owning their records.

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:**

Action	Permission Set Label	Description	License
<input type="checkbox"/>	Access_to_ACTIVITY	Allows access to the store. Lets users see products and categories. ...	B2B Buyer Permission Set One Seat
<input type="checkbox"/>	Buyer	Includes all buyer capabilities, and allows access to manage carts an...	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/>	Buyer_Manager	Denotes that the user is a Sales Cloud or Service Cloud user.	CRM User
<input type="checkbox"/>	CRM_User	Allow access to commerce admin features.	Commerce Admin Permission Set License Seat
<input type="checkbox"/>	Commerce_Admin	Manage Service Cloud Voice contact centers that use Amazon Conne...	Service Cloud Voice User
<input type="checkbox"/>	Contact_Center_Admin	Access agent features in Service Cloud Voice contact centers that us...	Service Cloud Voice User
<input type="checkbox"/>	Contact_Center_Agent	Access agent features in Service Cloud Voice contact centers that us...	Service Cloud Voice User
<input type="checkbox"/>	Contact_Center_Supervisor	Access supervisor features in Service Cloud Voice contact centers th...	Service Cloud Voice User
<input type="checkbox"/>	Experience_Profile_Manager	Lets users create, read, edit, and delete locations, sublocations, que...	Salesforce
<input type="checkbox"/>	Facility_Manager	Give your mobile workforce access to the Field Service mobile app. S...	Field Service Mobile
<input type="checkbox"/>	FieldServiceMobileStandardPermSet	Allow access to commerce merchandising features.	Commerce Merchandiser User Permission Set License Seat
<input type="checkbox"/>	Merchandiser	Read Access to all entities enabled by Order Management	Lightning Order Management User
<input type="checkbox"/>	Order_Management_Agent	Access to all features enabled by Order Management	Lightning Order Management User
<input type="checkbox"/>	Order_Management_Operations_Manager	Limited access to Order Management features for Self Service	Lightning Order Management User
<input type="checkbox"/>	Order_Management_Shopper		
- Page Navigation:** 1-25 of 29, 0 Selected, Previous, Next, 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' (empty). A checkbox for 'Session Activation Required' is unchecked. Below this, the 'Select the type of users who will use this permission set' section contains a note about license assignment and a dropdown for 'License' which 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 text 'salesmanager' has been typed. In the 'API Name' field, the text 'salesmanager' has also been typed. The 'Description' field remains empty. All other elements, including the 'Session Activation Required' checkbox and the 'Select the type of users who will use this permission set' section, are identical to 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	<input type="checkbox"/>	salesmanager	GOPAL_S
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 menu under 'Users':

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

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

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

The 'Field Permissions' section shows the following permissions:

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

The URL in the browser bar is: <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 menu under 'Users':

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

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

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

The 'Field Permissions' section shows the following permissions:

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

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

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
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 - 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.hnbdwmvwhhq.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):

- 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 | Reset Password | Salesforce | + | Finish update

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/permSets/0PS5j000008Phok/PermissionSetAssignment/new

Setup Home Object Manager

Select an Expiration Option For Assigned Users

No expiration date

Specify the expiration date

1 Day 1 Week 30 Days 60 Days Custom Date

Time zone Select a time zone...

Selected Users

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

Cancel Done Assign

The screenshot shows the 'Select an Expiration Option For Assigned Users' dialog in the Salesforce Setup interface. It allows users to choose whether to assign a permission set with or without an expiration date. If no expiration date is chosen, it can be customized. A table lists the selected user, their profile, and license. The user 'madhu b' is assigned the 'salesmanager' profile and the 'Salesforce Platform' license, with the expiration status set to 'Never Expires'.

Salesforce Developer Session | (128) Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce | Reset Password | Salesforce | + | Finish update

artificialintelligence-d-dev-ed.develop.lightning.force.com/one/app#eyJjb21wb25lbnREZWYiOjIzXR1cf9wbGF0Zm9ybV9wZXItczpwc2FSZXN1bHRQYWdliw...

Setup Home Object Manager

PERMISSION SET 'SALESMANAGER' assignments were successful.

Assignment Summary

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

Done

The screenshot shows the 'Assignment Summary' page after the permission set has been assigned. It displays a table with one row for the user 'madhu b', showing they have been assigned the 'Salesforce Platform' user license. The status of the assignment is marked as 'Success'.

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:

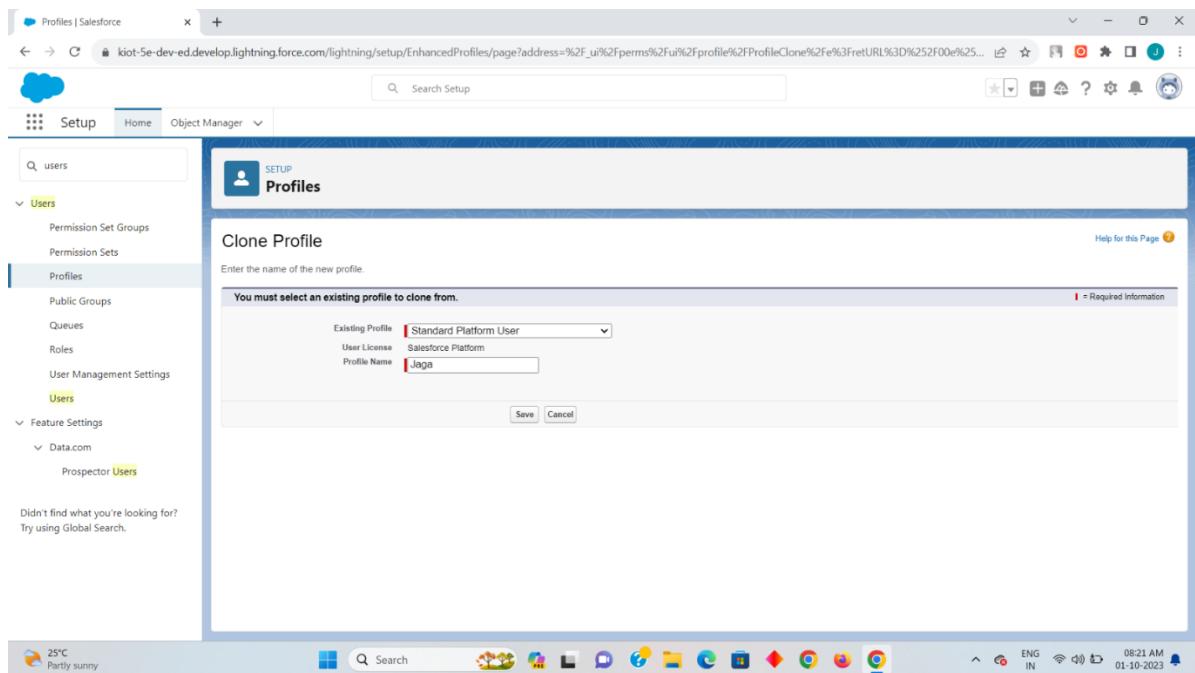
Step 1: we need create a profile for the two user which has the access to Create, Read, Edit for follow as per.

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:

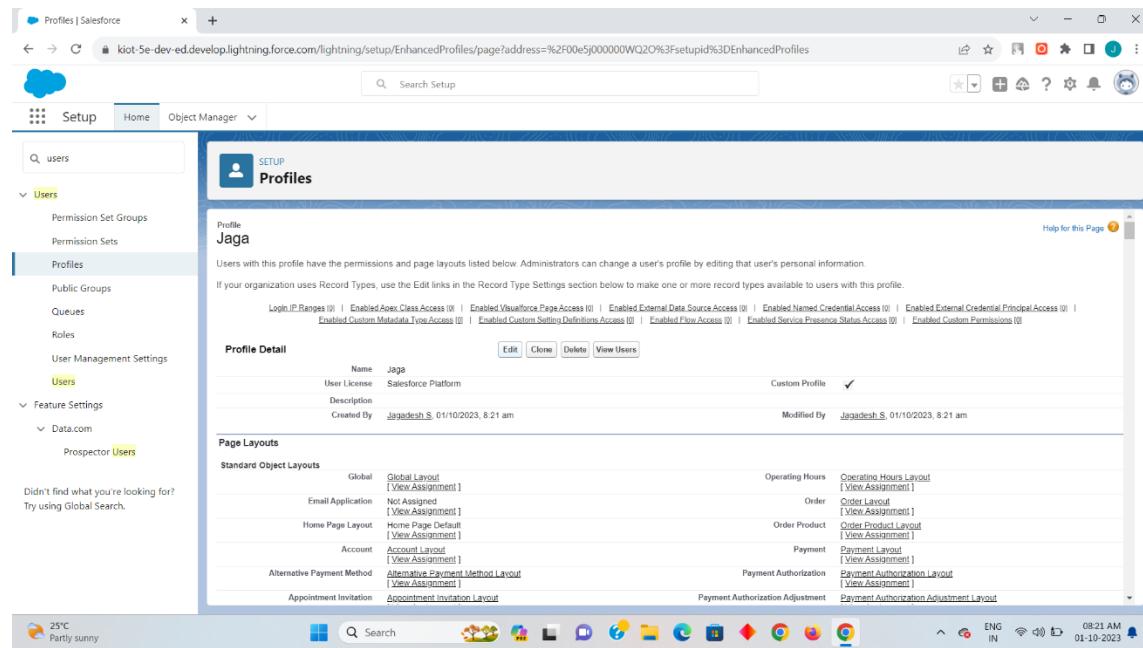
Click on the new to create a new profile along with the label and Api



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

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 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

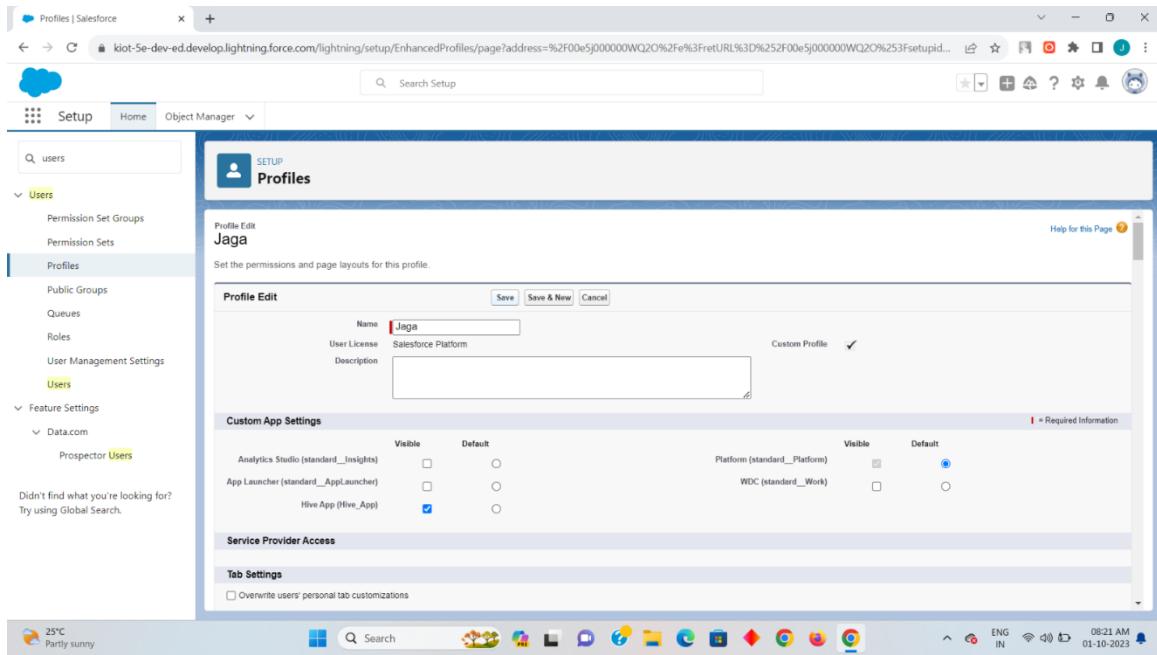
Enable different Experience Cloud login policies for employees.

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

25°C Partly sunny

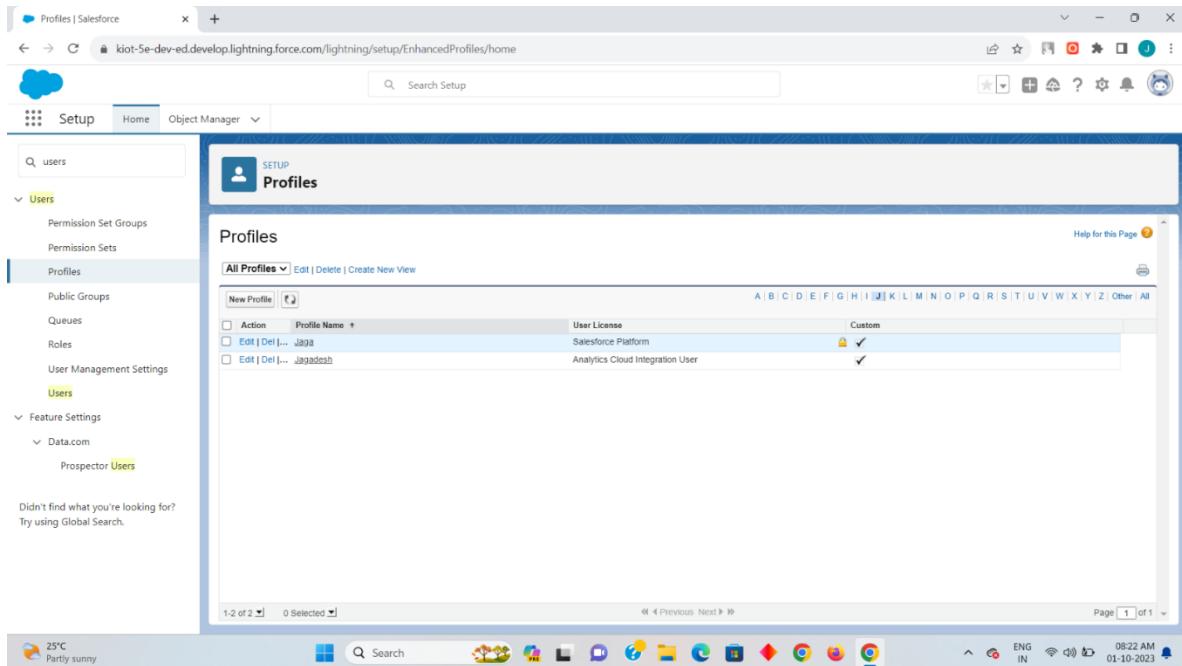
Search

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"/> Edit	Chatter Expert	Chatter	chatty@00d500000c0joseaf.6z@bkrkd4i@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	Grey Jane	jgrey	jane_gray.vgnimmoalm.cz7d2kogt3@gmail.com		<input checked="" type="checkbox"/>	Customer Community User
<input type="checkbox"/> Edit	S_Jaga	JS	jaga096@gmail.com	CEO	<input type="checkbox"/>	Standard Platform User
<input type="checkbox"/> Edit	S_Jagadesh	JS	w0w@gmail.com	SF Admin	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	S_Jagadesh	JS	jaga117@gmail.com	Channel Sales Team	<input type="checkbox"/>	Standard Platform User
<input type="checkbox"/> Edit	User_Integration	Integ	integration@00d500000c0joseaf.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_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

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User Management Settings

Users

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

Setup Home Object Manager

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

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

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Search Setup

Video Tutorial | Help for this Page

Permission Set permission12

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

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

Apps

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

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

Select 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

08:24 AM 01-10-2023 ENG IN

Permission Sets | Salesforce

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

Setup Home Object Manager

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

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

25°C Partly sunny

Search Setup

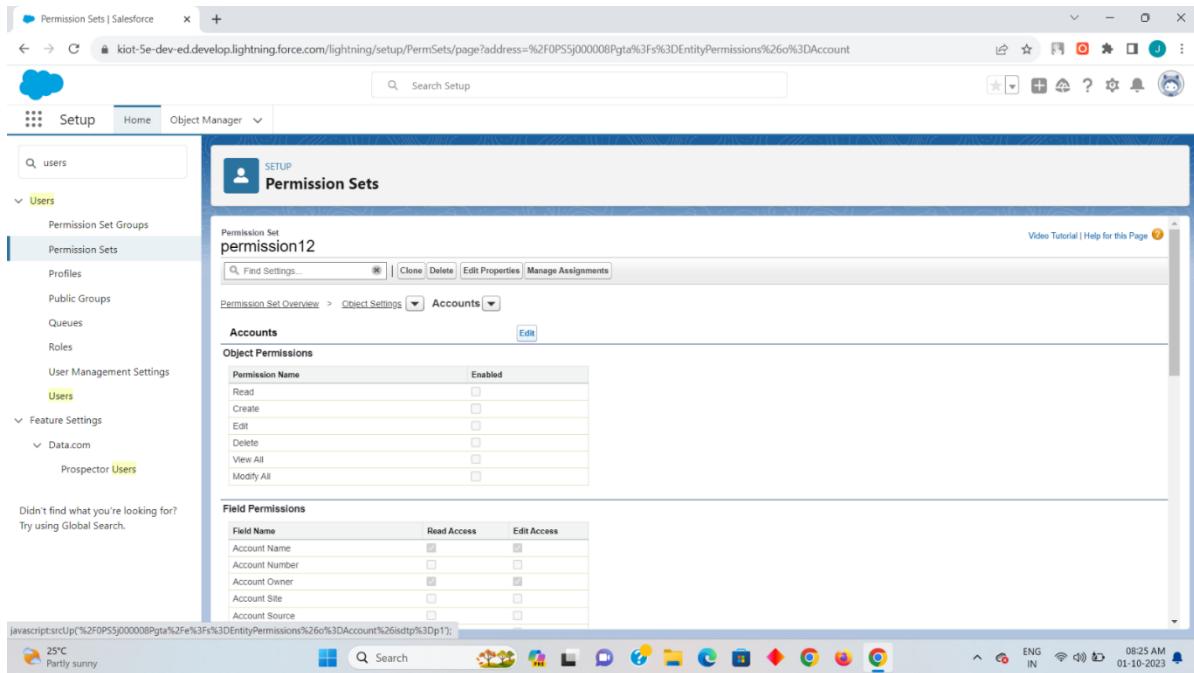
Video Tutorial | Help for this Page

Permission Set permission12

Object Settings

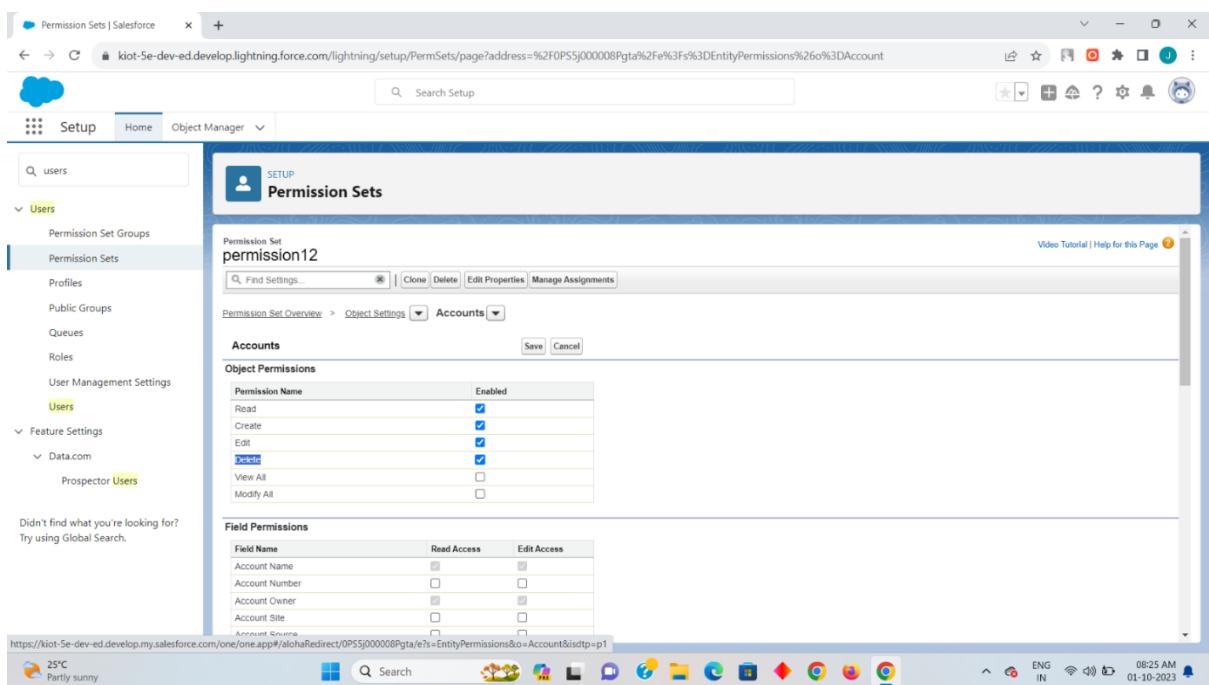
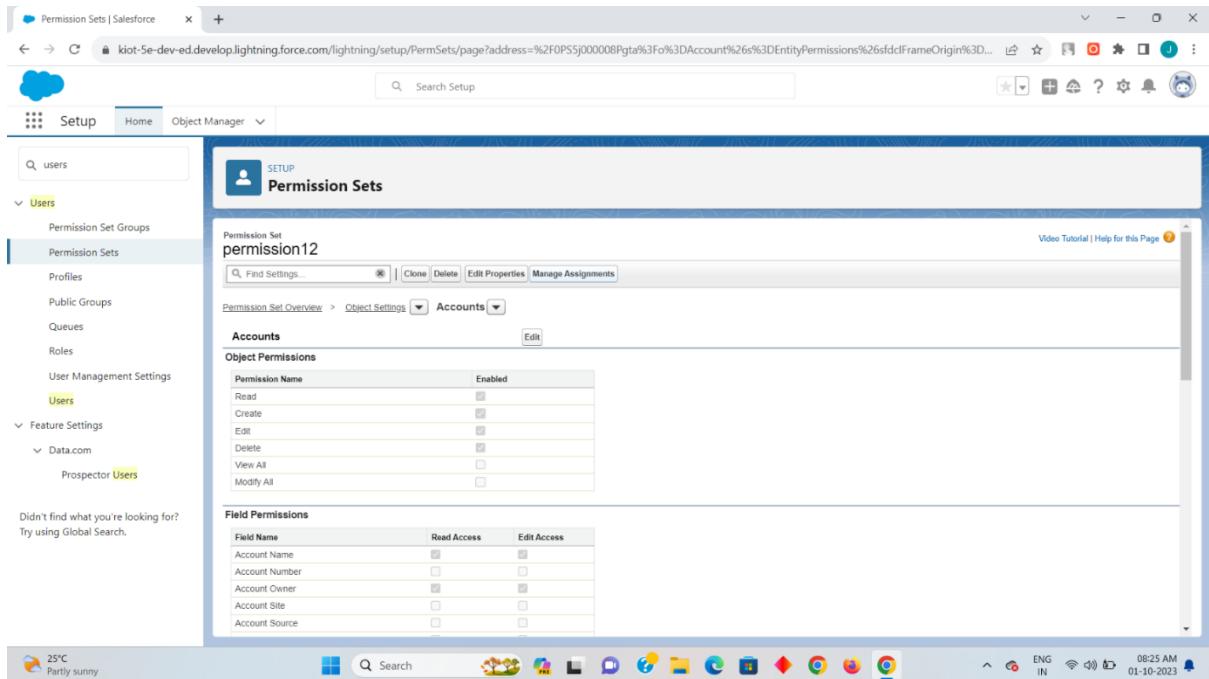
Object Name	Object Permissions	Total Fields	Tab Settings
Account Brands	No Access	9	--
Accounts	No Access	44	--
AI Insight Reasons	No Access	--	--
AI Record Insights	No Access	--	--
Alternative Payment Methods	No Access	27	--
API Anomaly Event Stores	No Access	14	--
App Analytics Query Requests	No Access	--	--
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:

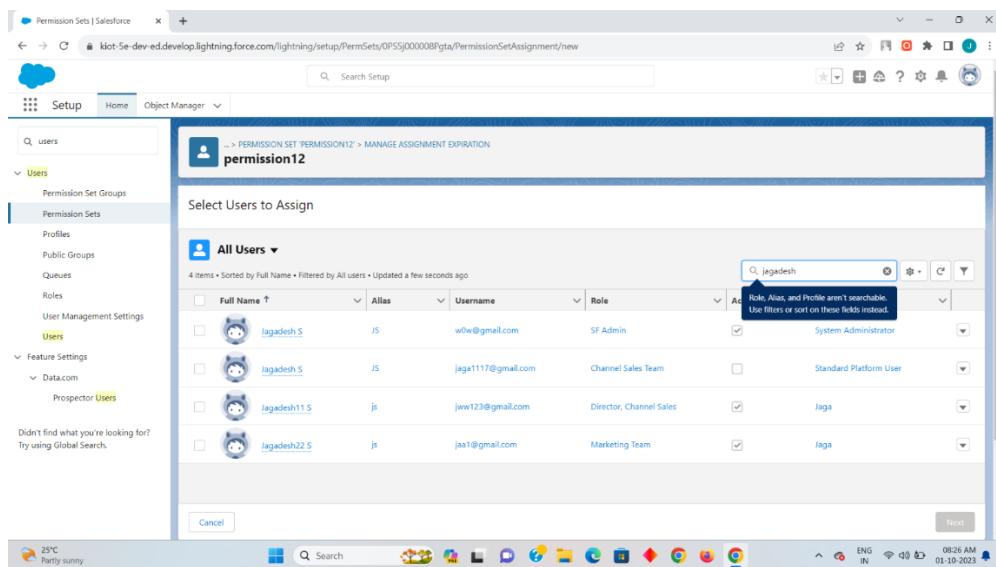
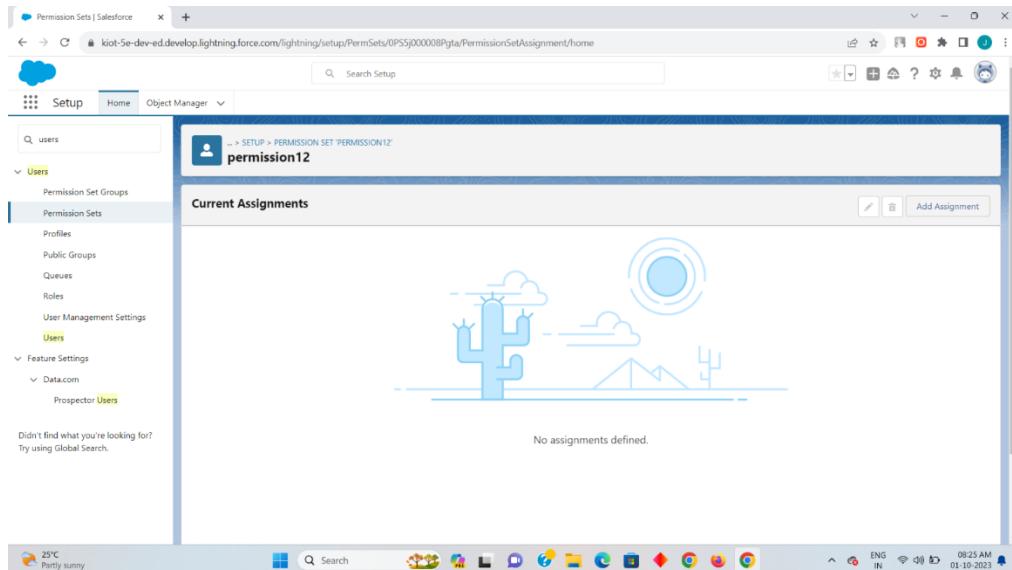
Now to give the specific delete access to the user click on edit on the Account and then enable the read,create,edit and the delete on it so that the permission set will have a specific special access on it. once it has been done click on save and then click on manage assignment.



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.

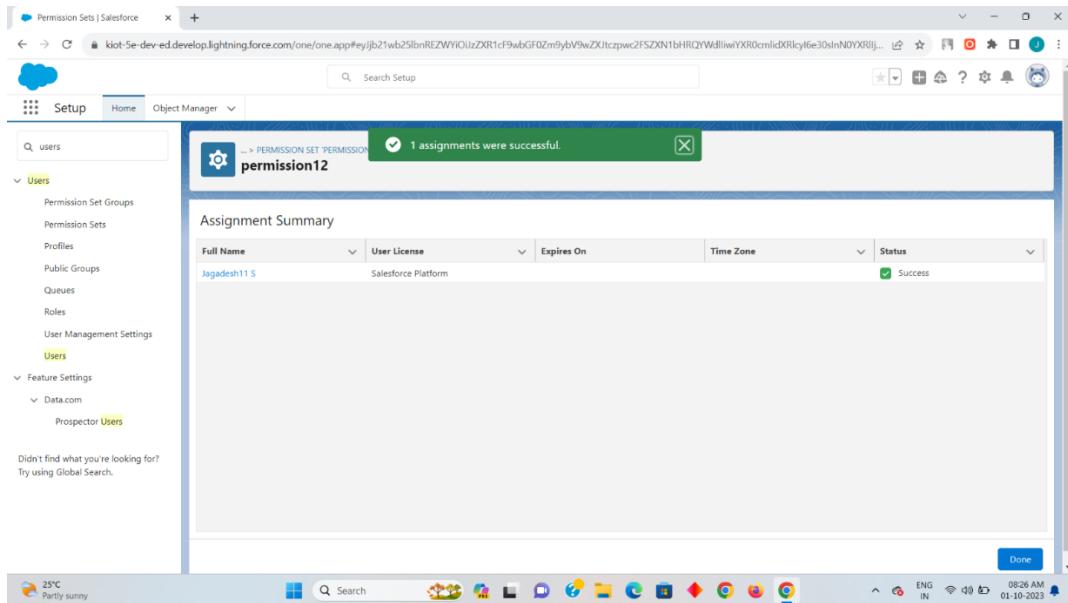


The screenshot shows the Salesforce Setup interface for managing permission set assignments. The left sidebar is collapsed, and the main area displays a list of users under the 'Users' section. A specific user, 'Jagadesh11 S', is highlighted with a checkmark in the 'Selected' column. The interface includes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

Click on next.

The screenshot shows the continuation of the permission set assignment process. The user 'Jagadesh11 S' is listed in the 'Selected Users' table. The 'Expires On' column shows 'Never Expires'. The 'Assign' button is visible at the bottom right of the screen.

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
+ Add Field	
<input type="checkbox"/> Manually assign variables	

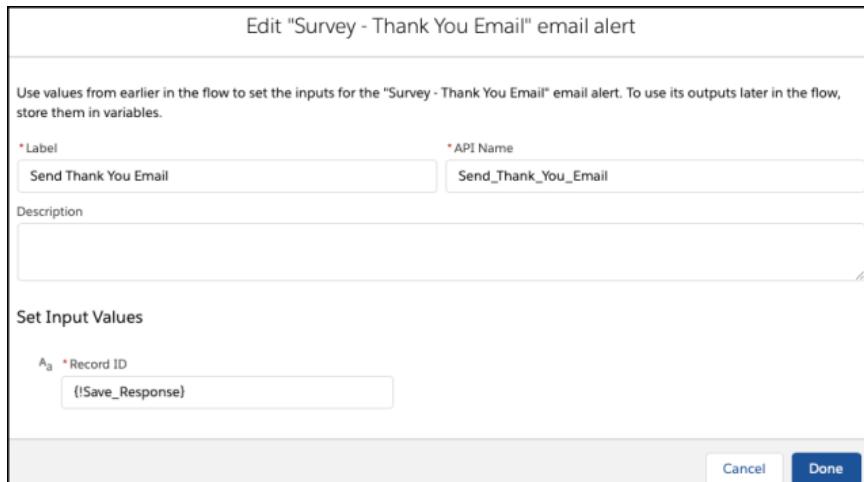
[Cancel](#) [Done](#)

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

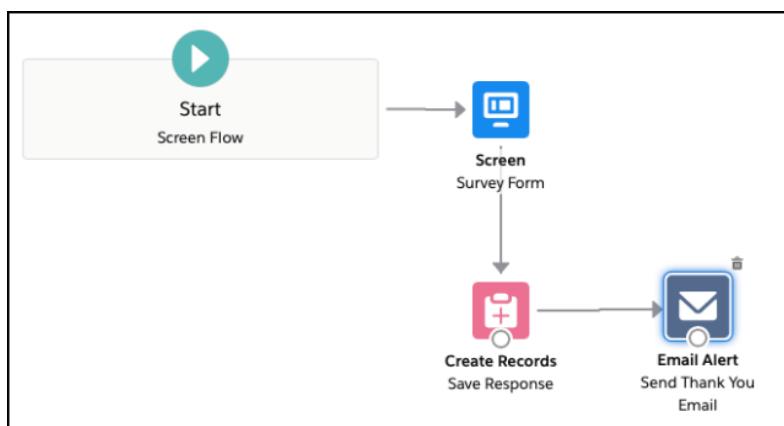
The next step is to call the **Survey – Thank You Email** email alert from flow so that when flow fires it triggers the thank you email to survey participants.

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}

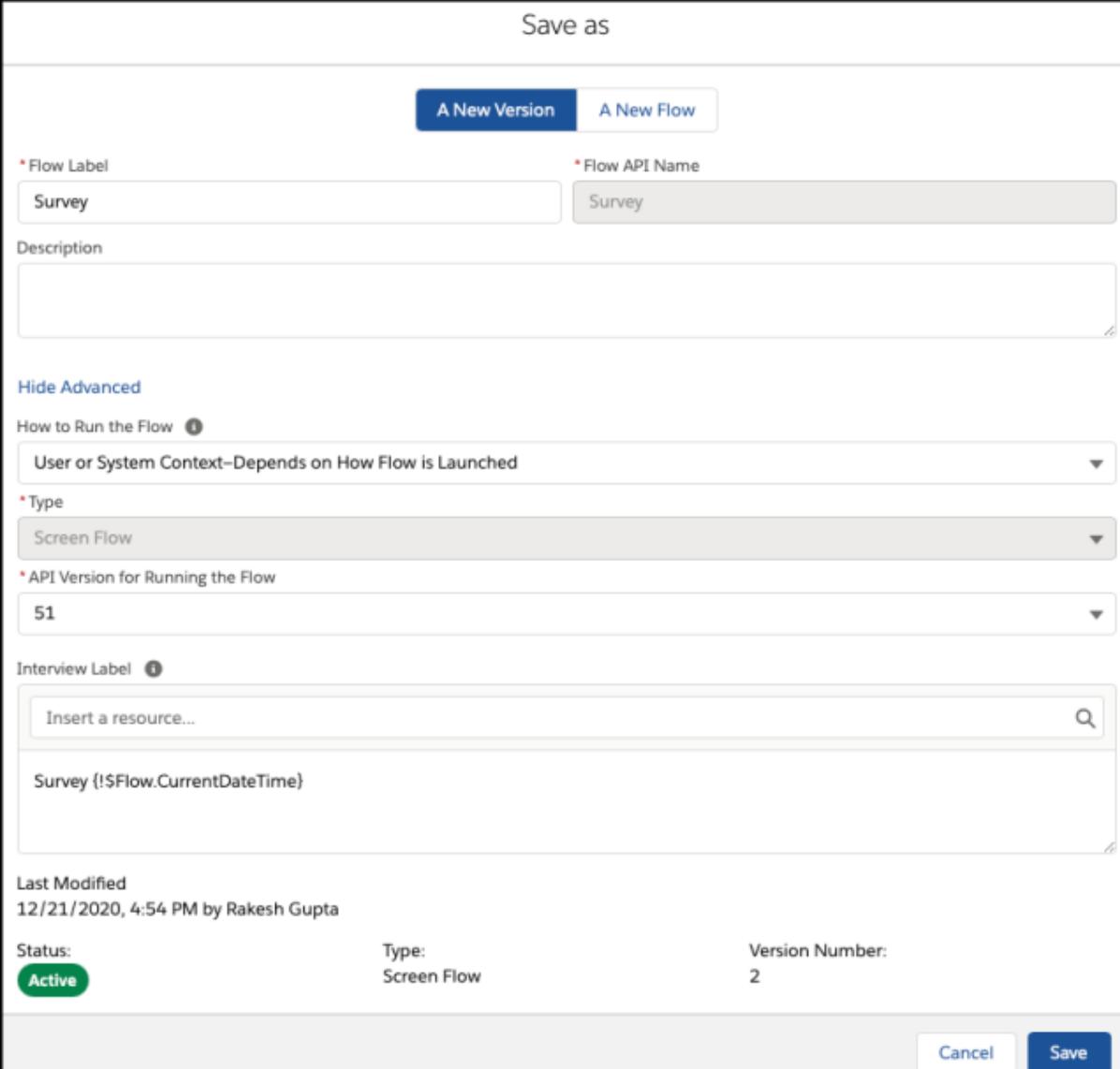
Last Modified: 12/21/2020, 4:54 PM by Rakesh Gupta

Status: [Active](#)

Type: Screen Flow

Version Number: 2

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

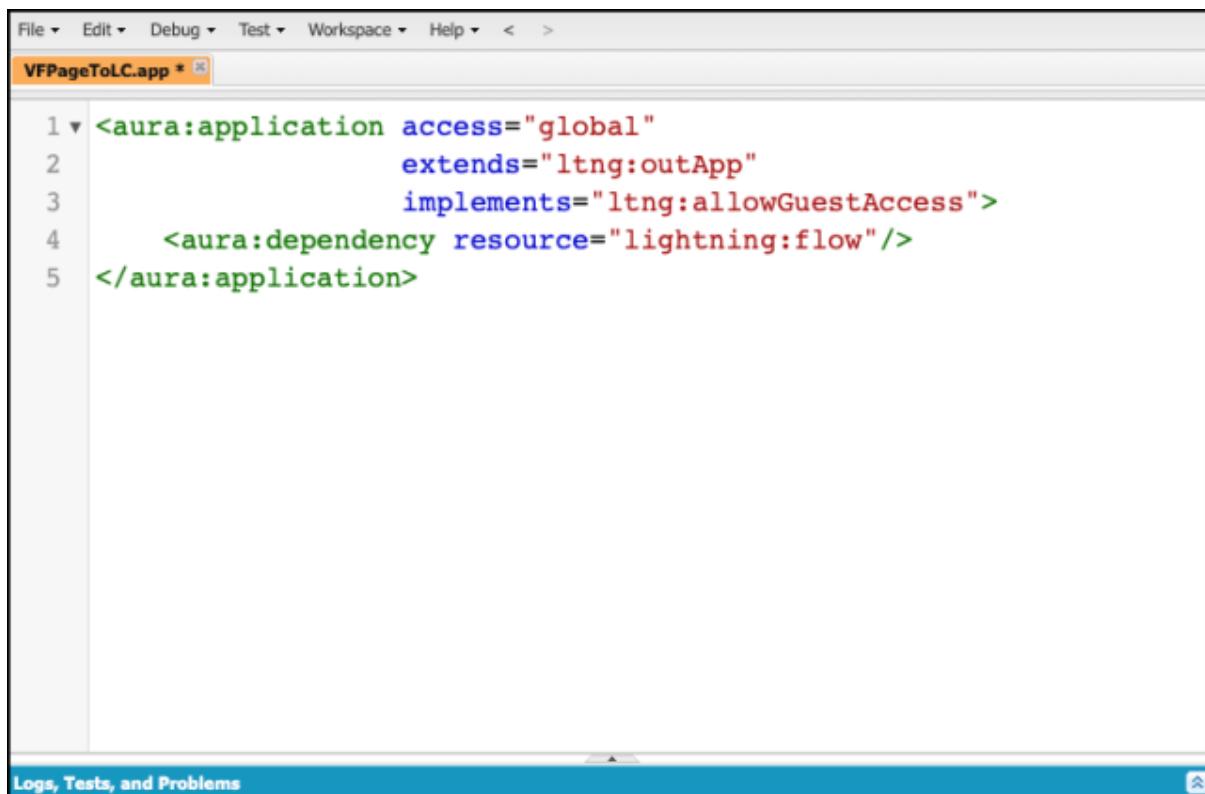


Step 5: Create a Lightning Application to Render Lightning Runtime for Flow in a

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.

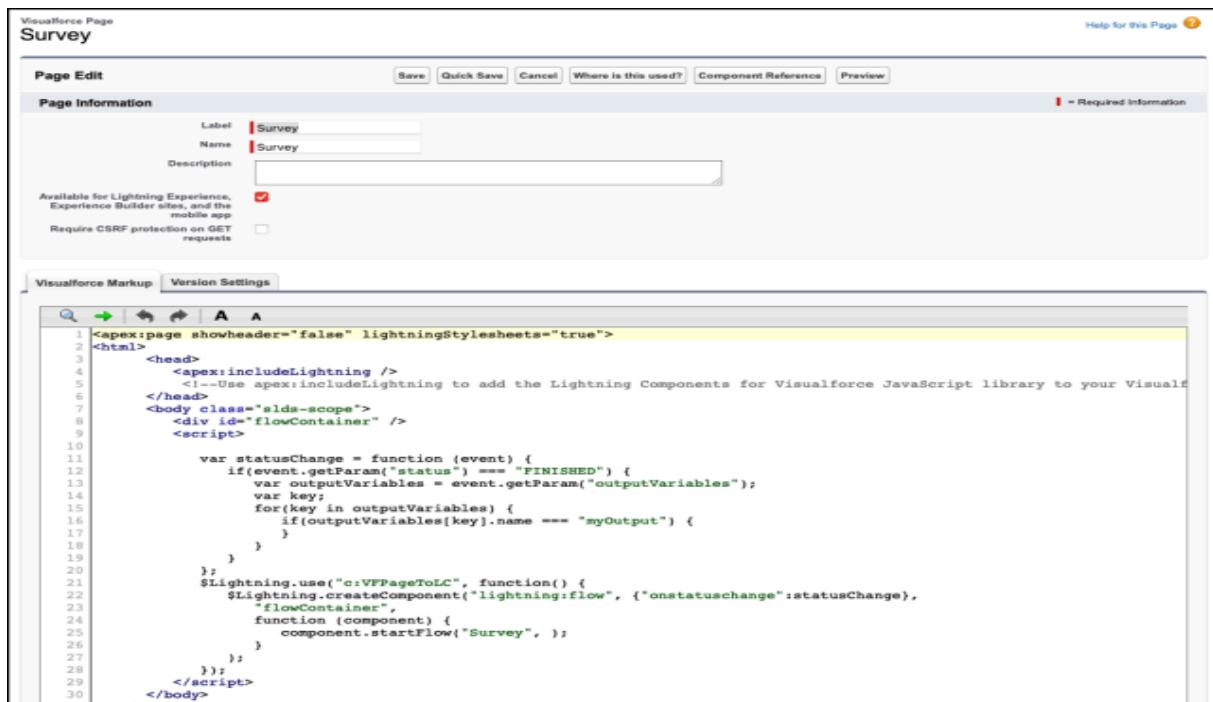
Step 6: Create a Visualforce Page and Embed Your Flow Into It

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). The "Visualforce Markup" tab is selected, showing 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 'Site Edit' with 'Save' and 'Cancel' buttons. It contains several sections with configuration options:

- 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