

Naan Mudhalvan  
Salesforce  
Developer(Course)  
Assignment no 1

Name : Abirami.R  
Naan Mudhalvan id :  
au611420104001  
Year & Dep : 4<sup>th</sup> year & CSE  
Batch : 2024  
Zone no : Zone 8

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

Solution:

Step 1: Create Custom Objects

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

Setup

Home

Object Manager

Search Setup

Setup

New Custom Object

New Custom Object

Help to this Page

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

Custom Object Definition Edit

Save Save & New Cancel

Custom Object Information

1 Required 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

Description

Context-Sensitive Help Setting

☒ Open the standard Salesforce.com Help & Training window

☐ Open a window using a Visualforce page

Context Name

Enter Record Name Label and Format

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

Record Name college Name Example: Account Name

Data type Text

Optional Features

☐ Allow Reports

☐ Allow Activities

☐ Track Field History

☐ Allow in Chatter Groups

☐ Enable Licensing

Object Classification

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

☒ Allow Sharing

☒ Allow Bulk API Access

☒ Allow Streaming API Access

Deployment Status

[What is this?](#)

☐ In Development

☒ Deployed

Search Status

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

☐ Allow Search

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

☐ Add Notes and Attachments related list to default page layout

☐ Launch New Custom Tab Wizard after saving this custom object

Save Save & New Cancel

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

The screenshot shows the Salesforce Setup interface, specifically the Object Manager section. The page title is "New Custom Object". A yellow banner at the top states: "Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tailor the menu!](#) [Don't show this message again](#)".

The main section is "Custom Object Definition Edit" with buttons for "Save", "Save & New", and "Cancel". It is divided into several sections:

- Custom Object Information:** This section includes fields for "Label" (set to "department", example: "Account"), "Plural Label" (set to "departments", example: "Accounts"), and "Object Name" (set to "department", example: "Account"). There is also a "Description" text area and a "Context-Sensitive Help Setting" with options to "Open the standard Salesforce.com Help & Training window" (selected) or "Open a window using a Visualforce page".
- Enter Record Name Label and Format:** This section includes a "Record Name" field (set to "Department Name", example: "Account Name") and a "Data type" dropdown (set to "Text").
- Optional Features:** This section includes checkboxes for "Allow Reports", "Allow Activities", "Track Field History", "Allow in Chatter Groups", and "Enable Licensing".
- Object Classification:** This section includes a note about object classification and checkboxes for "Allow Sharing", "Allow Bulk API Access", and "Allow Streaming API Access".
- Deployment Status:** This section includes checkboxes for "In Development" and "Deployed".
- Search Status:** This section includes a checkbox for "Allow Search".
- Object Creation Options (Available only when custom object is first created):** This section includes checkboxes for "Add Notes and Attachments related list to default page layout" and "Launch New Custom Tab Wizard after saving this custom object".

At the bottom of the form are buttons for "Save", "Save & New", and "Cancel".

## Step 2: Create a Master-Detail Relationship

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

1. Go to Setup > Object Manager.
2. Click on "College\_\_c" to open its settings.

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

Setup

Home

Object Manager

Search Setup

SETUP > OBJECT MANAGER

CDepartment

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

Details

Description

API Name  
CDepartment\_\_c

Custom  
✓

Singular Label  
CDepartment

Plural Label  
CDepartments

Enable Reports

Track Activities

Track Field History

Deployment Status  
Deployed

Help Settings  
Standard salesforce.com Help Window

Edit

Delete

Setup

Home

Object Manager

Search Setup

SETUP > OBJECT MANAGER

CDepartment

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

CDepartment

New Relationship

Help for this Page

Step 3 of 6

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

Field Label  
college

Field Name  
college

Description

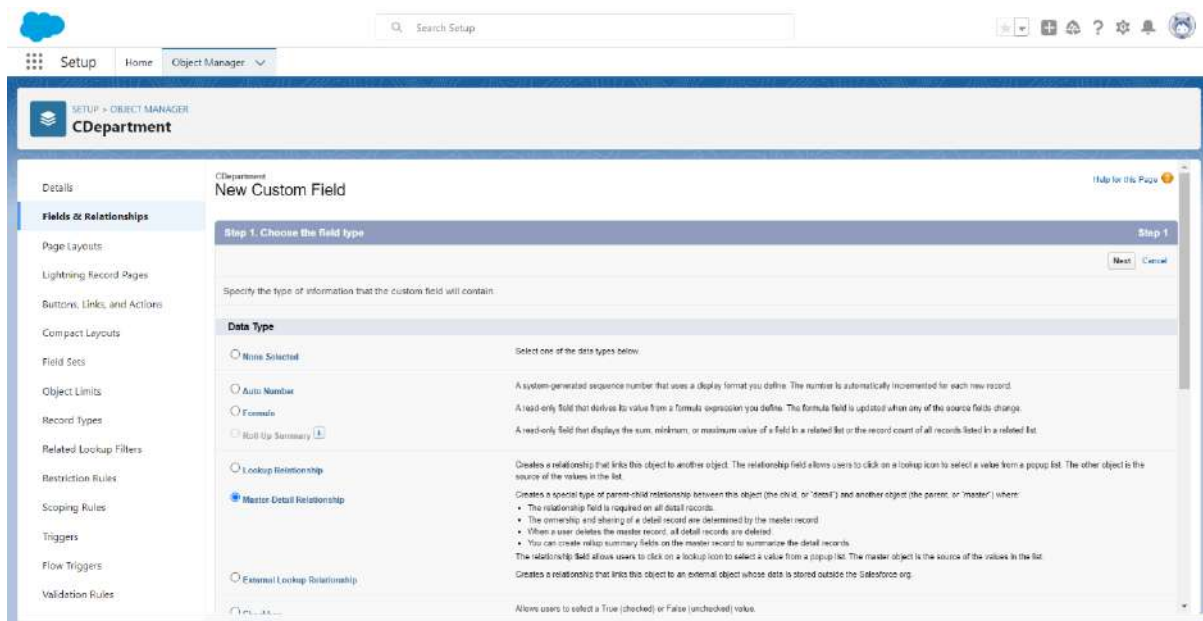
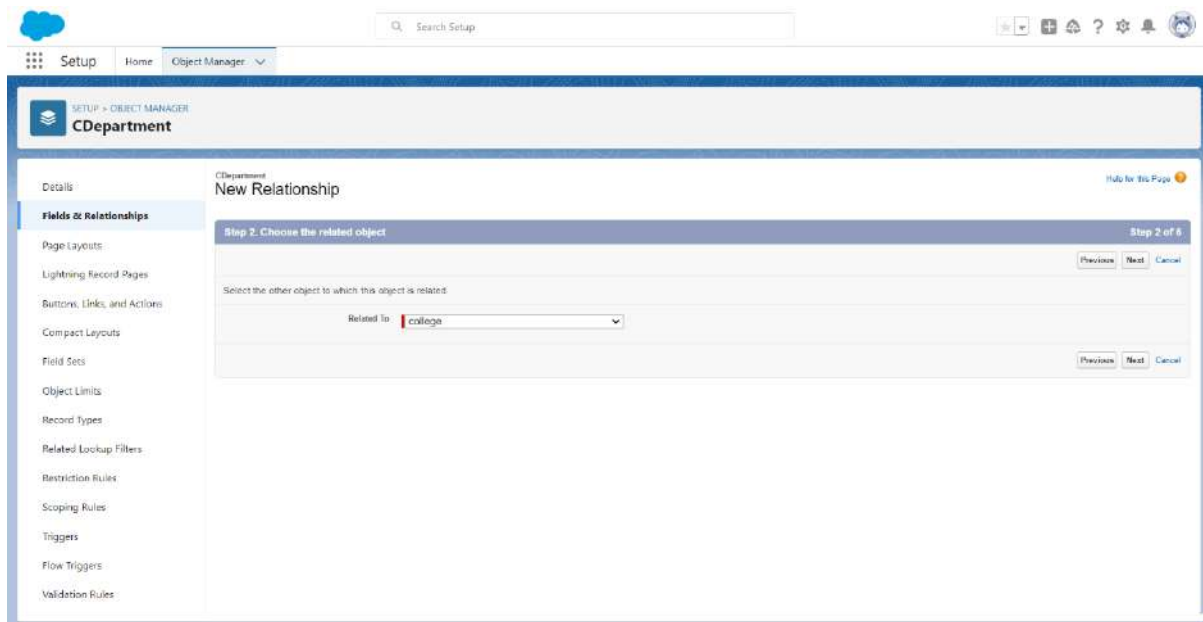
Help Text

Child Relationship Name  
CDepartments

Sharing Setting  
Read Only. Allows users with at least Read access to the Master record to create, edit, or delete related Detail records.  
☒ Read Only. Allows users with at least Read access to the Master record to create, edit, or delete related Detail records.  
☐ Read/Write. Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.

Allow reparenting  
Auto add to custom report type  
☐ Child records can be reparented to other parent records after they are created.  
☒ Add this field to existing custom report types that contain this entry.

Lookup Filter



## 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

Home

Object Manager

Search Setup

Setup > OBJECT MANAGER

CDepartment

Details

Fields & Relationships

4 Items, Sorted by Field Label

Q, Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

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)		

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

Setup

Home

Object Manager

Search Setup

Setup

Tabs

Q tabs

User Interface

Rename Tabs and Labels

Tabs

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

Custom Tabs

Help for this Page

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

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

Custom Object Tabs

New

What Is This?

Action	Label	Tab Style	Description
Edit   Del	Books	Books	
Edit   Del	Research Proposal	Research Proposal	
Edit   Del	Student	Student	

Web Tabs

New

What Is This?

No Web Tabs have been defined

Visualforce Tabs

New

What Is This?

No Visualforce Tabs have been defined

Lightning Component Tabs

New

What Is This?

No Lightning component tabs have been defined

Lightning Page Tabs

New

What Is This?

No Lightning Page Tabs have been defined

cloud

SetupHomeObject Manager

college

college

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

college

New Custom Field

Help for this Page

Step 6 of 6

Step 6. Add to page layouts

Field Label: Total count

Data Type: Roll-Up Summary

Field Name: Total\_count

Description:

Select the page layouts that should include this field. The field will be added as the first 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.

PreviousSave & NewSaveCancel

cloud

SetupHomeObject Manager

college

college

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

college

New Custom Field

Help for this Page

Step 4 of 6

Step 4. Establish field-level security

Field Label: Total count

Data Type: Roll-Up Summary

Field Name: Total\_count

Description:

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

Field-Level Security for Profile	<input type="checkbox"/> Visible	<input type="checkbox"/> 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"/>
Finance.com - Asset Submission User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

PreviousNextCancel

Setup

Home

Object Manager

college

college

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

college

New Custom Field

Help for this Page

Step 3. Define the summary calculation

Step 3 of 5

Previous

Next

Cancel

Select Object to Summarize

Master Object: college

Summarized Object: CDepartments

Required Information

Select Roll-Up Type

COUNT

SUM

MIN

MAX

Field to Aggregate: Name

Filter Criteria

All records should be included in the calculation

Only records meeting certain criteria should be included in the calculation

Previous

Next

Cancel

Setup

Home

Object Manager

college

college

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

college

New Custom Field

Help for this Page

Step 2. Enter the details

Step 2 of 5

Previous

Next

Cancel

Field Label: Total count

Field Name: Total\_count

Description

Help Text

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

Previous

Next

Cancel

**college**

Setup > OBJECT MANAGER

Details

**Fields & Relationships**

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

**New Custom Field**

Step 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.

☐ Formula

A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

☒ Roll Up Summary

A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

☐ Lookup Relationship

Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

☐ Master-Detail Relationship

Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

☐ External Lookup Relationship

Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

☐ Picklist

Allows users to select a True (checked) or False (unchecked) value.

**college**

Setup > OBJECT MANAGER

Details

**Fields & Relationships**

4 Items, Sorted by Field Label

Q, Quick Find

New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
college Name	Name	Text(80)		✓
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedBy	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

Setup

Home

Object Manager

Q tabs

User Interface

Rename Tabs and Labels

Tabs

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

SETUP

Tabs

Help for this Page

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--

Enter a short description.

Description

Next Cancel

Setup

Home

Object Manager

Search Setup

Setup

Home

Object Manager

Q app

Salesforce Mobile App

Data

Mass Transfer Approval Requests

Apps

App Manager

AppExchange Marketplace

Connected Apps

Connected Apps OAuth Usage

Manage Connected Apps

Lightning Bolt

Flow Category

Lightning Bolt Solutions

Mobile Apps

Salesforce

Salesforce Branding

Salesforce Navigation

Salesforce Notifications

Salesforce Offline

Salesforce Settings

Packaging

Installed Packages

Lightning Experience App Manager

New Lightning App

New Connected App

20 items • Sorted by App Name • Filtered by All app namespaces • Tabset Type

App Name	Developer Name	Description	Last Modified Date	App ...	Visi...
1 All Tabs	AllTabSet		14/07/2023, 10:47 am	Classic	
2 Analytics Studio	Insights	Build CRM Analytics dashboards and apps	14/07/2023, 10:47 am	Classic	
3 App Launcher	AppLauncher	App Launcher tabs	14/07/2023, 10:47 am	Classic	
4 Bolt solutions	Lightningbolt	Discover and manage business solutions designed for your industry.	14/07/2023, 10:47 am	Lightning	
5 Community	Community	Salesforce CRM Communities	14/07/2023, 10:47 am	Classic	
6 Content	Content	Salesforce CRM Content	14/07/2023, 10:47 am	Classic	
7 Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage rosters.	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	Item 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	



Setup

Home

Object Manager

Search Setup

tabs

User Interface

Rename Tabs and Labels

**Tabs**

Didn't find what you're looking for?

Try using Global Search.

SETUP

Tabs

Custom Tabs






Help for this Page

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

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

Custom Object Tabs

New | What Is This?

Action	Label	Tab Style	Description
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Book1</a>	 Box	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Departments</a>	 Lightning	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">challenges</a>	 Jewel	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Richardson,Proccosh</a>	 Square	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">student</a>	 Box	

Web Tabs

New | What Is This?

No Web Tabs have been defined.

Visualforce Tabs

New | What Is This?

No Visualforce Tabs have been defined.

Lightning Component Tabs

New | What Is This?

No Lightning component tabs have been defined.

Lightning Page Tabs

New | What Is This?

No Lightning Page Tabs have been defined.

## **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...



college  
mecw

New Contact Edit New Opportunity

Related

Details

college Name

mecw

Total count

2

phone

9087116402

Email

kkot@gmail.com

Location

90, 80

Created By

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

Owner

krishna s

Last Modified By

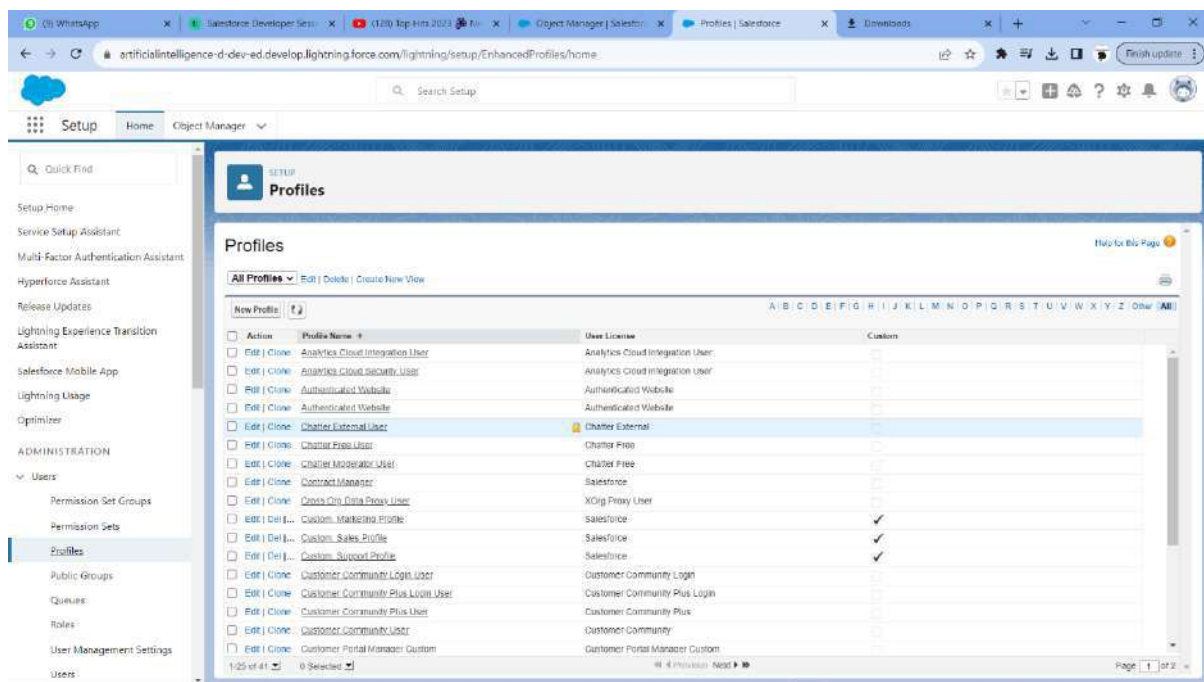
krishna s. 01/10/2023, 11:19 am

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.



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

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Hyperforce Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

ADMINISTRATION

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

### Profiles

All Profiles | Edit | Delete | Create New View

New Profile

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit   Clone	Salesforce API Only System Integrations	Salesforce Integration	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	System Administrator	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Setup Partner User	Setup 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"/>

1-7 of 7 | 0 Selected | 4 Profiles | Next > < Back

Page 1 of 1

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

### Clone Profile

Enter the name of the new profile

You must select an existing profile to clone from.

Existing Profile	User License	Profile Name
Standard Platform User	Salesforce Platform	

Save Cancel



artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2Fui%2Fperms%2Fu%2Fprofile%2FprofileClone%2Fa%...

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

## Clone Profile

Enter the name of the new profile

You must select an existing profile to clone from.

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

Save Cancel

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j000000WQBz63Fsetupic%3DEnhancedProfiles...

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

## Profile: Manager

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

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

Login IP Ranges (0) | Enabled Apex Class Access (0) | Enabled Visualforce Page Access (0) | Enabled External Data Source Access (0) | Enabled External Credential Access (0) | Enabled External Credential Principal Access (0) | Enabled Custom Metadata Type Access (0) | Enabled Custom Settings Definitions Access (0) | Enabled Flow Access (0) | Enabled Service Presence Status Access (0) | Enabled Custom Permissions (0)

Edit Clone Delete View Users

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

### Page Layouts

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

Setup Home: Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer

ADMINISTRATION

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

### Profiles

Manager

Set the permissions and page layouts for this profile

**Profile Edit**

Name:  Save Save & New Cancel

User License: Salesforce Platform Custom Profile: ☒

Description:

**Custom App Settings**

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

**Service Provider Access**

**Tab Settings**

☐ Overwrite users' personal tab customizations

Standard Tab Settings

	Item	Default On
Accounts	<input checked="" type="checkbox"/>	Default On
Alert Settings	<input checked="" type="checkbox"/>	Default On

Learning: ☒ Default On

Libraries: ☒ Tab Hidden

Lightning Bolt Solutions: ☒ Default On

### Profiles

**Communication Subscription Channel Types**

	Read	Create	Edit	Delete	View All	Modify All
Communication Subscription Channel Types	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication Subscription Consents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication Subscription Timings	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contacts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Addresses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Consents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Emails	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Custom Object Permissions**

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

**Session Settings**

Session Timeout After:  Session Security Level Required at Login:

**Password Policies**

User passwords expire in:  Enforce password history:  Minimum password length:

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j000000WQBz%2F%3FretURL%3D%2F00e5j0...

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

	Read	Create	Edit	Delete	View All	Modify All
Contact Point Addresses	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Consents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Emails	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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

#### Custom Object Permissions

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

	Read	Create	Edit	Delete	View All	Modify All
Enhancement Requests	<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

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j000000WQBz%2F%3FretURL%3D%2F00e5j0...

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

#### Custom Object Permissions

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

	Read	Create	Edit	Delete	View All	Modify All
Enhancement Requests	<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

Obscure secret answers for password resets: ☐

Require a minimum 1 day password lifetime: ☐

Don't immediately expire links in forgot password emails: ☐



Setup Home Object Manager

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

ADMINISTRATION

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

PLATFORM TOOLS

- Apps

Search Setup

## Users

### New User

User Edit Save Save & New Cancel

General Information

First Name

Last Name

Alias

Email

Username

Nickname

Title

Company

Department

Division

Role

User License

Profile

Active ☒

Marketing User ☐

Offline User ☐

Knowledge User ☐

Flow User ☐

Service Cloud User ☐

Site.com Contributor User ☐

Site.com Publisher User ☐

WDC User ☐

Data.com User Type

Data.com Monthly Addition Limit

Accessibility Mode (Classic Only) ☐

High Contrast Palette on Charts ☐

Load Lightning Pages While Scrolling ☒

Debug Mode ☐

Setup Home Object Manager

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

ADMINISTRATION

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

PLATFORM TOOLS

- Apps

Search Setup

## Users

### New User

User Edit Save Save & New Cancel

General Information

First Name

Last Name

Alias

Email

Username

Nickname

Title

Company

Department

Division

Role

User License

Profile

Active ☒

Marketing User ☐

Offline User ☐

Knowledge User ☐

Flow User ☐

Service Cloud User ☐

Site.com Contributor User ☐

Site.com Publisher User ☐

WDC User ☐

Data.com User Type

Data.com Monthly Addition Limit

Accessibility Mode (Classic Only) ☐

High Contrast Palette on Charts ☐

Load Lightning Pages While Scrolling ☒

Debug Mode ☐



Setup | Home | Object Manager | Users | Salesforce

Search Setup

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

PLATFORM TOOLS  
Apps

Users

User Detail

Name: sowmya bala  
Alias: sbala  
Email: 2520cse17a@knot.ac.in (Watch)  
Username: 2521t@knot.ac.in  
Nickname: User16951677128256102616  
Title: worker  
Company: knot bank  
Department  
Division  
Address  
Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata)  
Locale: English (India)  
Language: English  
Delegated Approver  
Manager  
Receive Approval Request Emails: Only if I am an approver  
Federation ID  
App Registrations: One-Time Password Authenticator  
App Registration: Salesforce Authentication

Role: Salesforce Platform  
User License: Platform  
Profile: Manager  
Active: ☒  
Marketing User: ☐  
Offline User: ☐  
Knowledge User: ☐  
Flow User: ☐  
Service Cloud User: ☐  
Site.com Contributor User: ☐  
Sales.com Publisher User: ☐  
WDC User: ☐  
Mobile Push Registrations: Data.com User Type: ☐  
Accessibility Mode (Classic Only): ☐  
Debug Mode: ☐  
High-Contrast Palette on Charts: ☐  
Load Lightning Pages While Scrolling: ☒  
Salesforce CRM Content User: ☒

mail.google.com/mail/u/0/#inbox/TMfopGtsStlSqKkLzCghDnsOxv1

Search in mail

Active

1 of 6,486

support@salesforce.com <support@salesforce.com>  
to me

7:15 PM (10 minutes ago)

salesforce

Welcome to Salesforce!

Click below to verify your account.

Verify Account

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

Username:  
[2521t@knot.ac.in](mailto:2521t@knot.ac.in)

Again, welcome to Salesforce!

© Copyright 2000-2018 salesforce.com, inc. All rights reserved. Various trademarks held by their respective owners.

artificialintelligence-d-dev-ed.develop.my.salesforce.com/\_ui/system/security/ChangePassword?retURL=%2FHome%2FHome.jsp%3FfromFrontdoor=1&satupid=Ch...

salesforce

### Change Your Password

Enter a new password for **2k21it@kist.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:

[Change Password](#)

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

Login | Salesforce

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

salesforce

Username:

Password:


[Log In](#)

☐ Remember me.

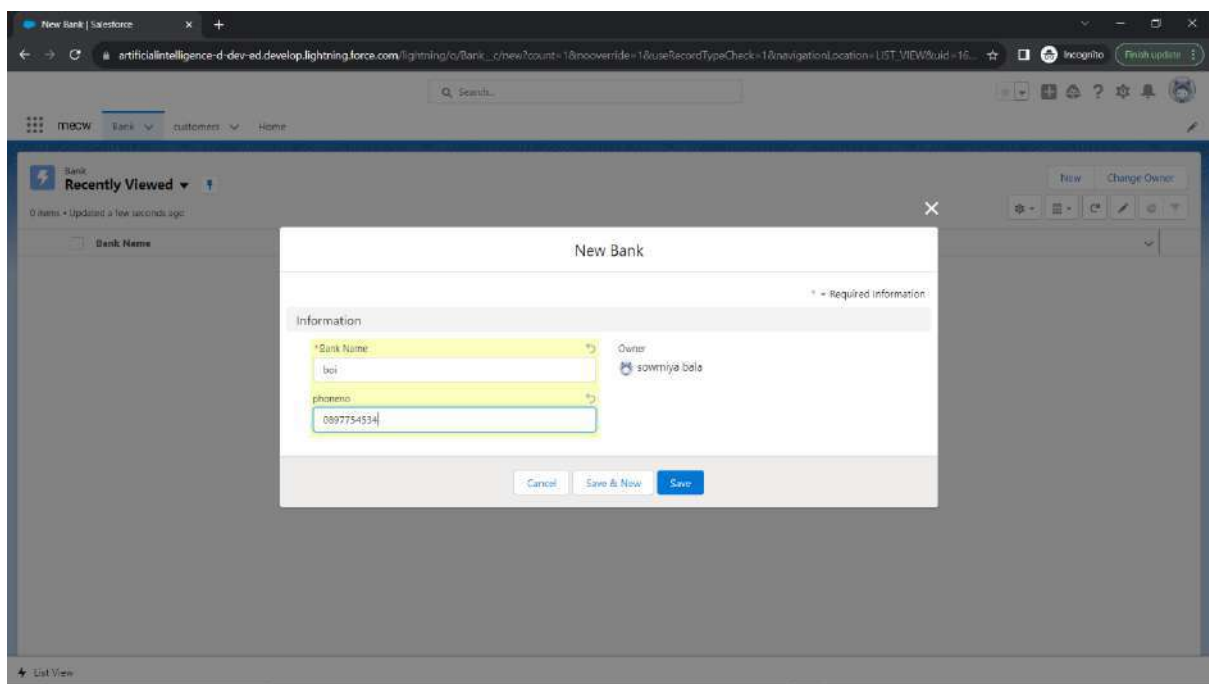
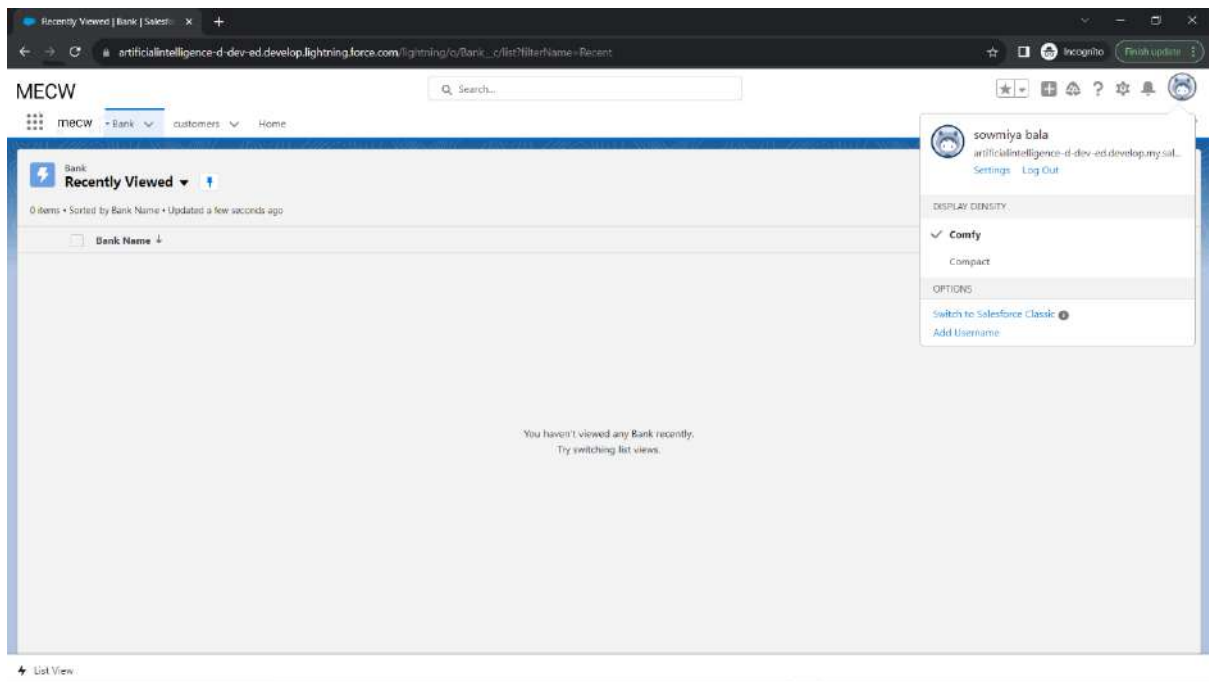
[Forgot Your Password?](#)

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

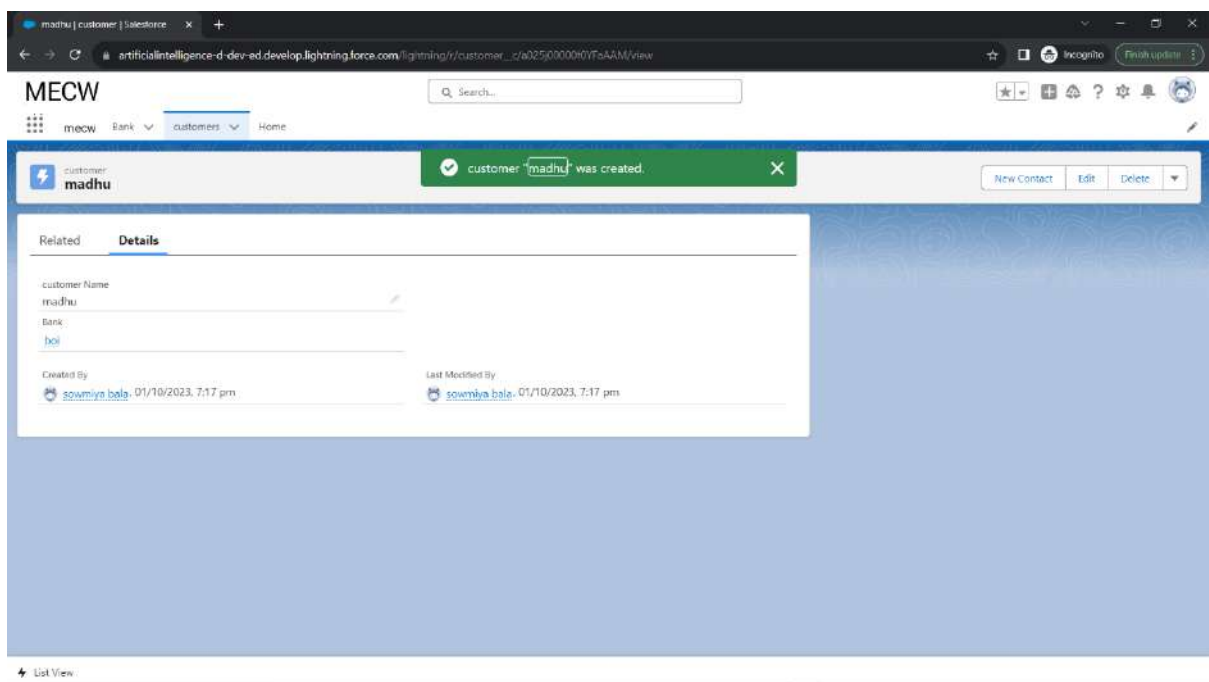
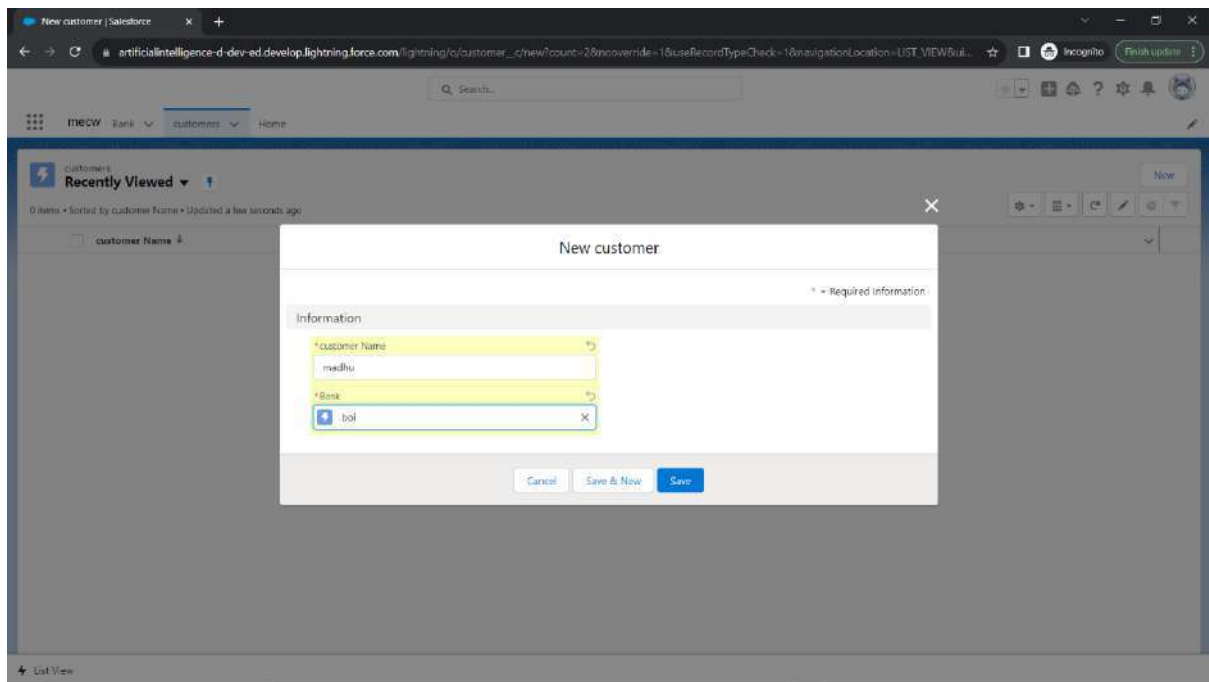
[WATCH ON DEMAND](#)

 **AI Day**

© 2023 Salesforce, Inc. All rights reserved.









artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j000000WQCE%3FSetupId%3D%3DehancedPr...

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Hyperforce Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

ADMINISTRATION

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

### Profiles

Profile: salesmanage

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

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

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

**Profile Detail**

Name: salesmanage

User License: Salesforce Platform

Description:

Created By: GOPAL S. 01/10/2023, 7:19 pm

Modified By: GOPAL S. 01/10/2023, 7:19 pm

**Page Layouts**

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

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j000000WQCE%3FSetupURL%3D%2F0...

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Hyperforce Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

ADMINISTRATION

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

### Profiles

Profile Edit: salesmanage

Set the permissions and page layouts for this profile.

**Profile Edit**

Name: salesmanage

User License: Salesforce Platform

Description:

Custom Profile: ☒

**Custom App Settings**

	Visible	Default		Visible	Default
Analytics Studio (standard__Insights)	<input type="checkbox"/>	<input type="radio"/>	Picklists (standard__Picklists)	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>
App Launcher (standard__AppLauncher)	<input type="checkbox"/>	<input type="radio"/>	WDC (standard__Work)	<input type="checkbox"/>	<input type="radio"/>
Not (for)	<input checked="" type="checkbox"/>	<input type="radio"/>			

**Service Provider Access**

**Tab Settings**

☐ Override user's personal tab customizations

**Standard Tab Settings**

Home: Default On

Learning: Default On



Setup Home Object Manager

Search Setup

user

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Service

Embedded Service

Messaging for In-App and Web User

User Interface

Action Link Templates

Actions & Recommendations

App Menu

## Setup Users

### New User

User Edit Save Save & New Cancel

General Information

First Name

Last Name

Alias

Email

Username

Nickname

Title

Company

Department

Division

Role

User License

Profile

Active

Marketing User

Offline User

Knowledge User

Flow User

Service Cloud User

Site.com Contributor User

Site.com Publisher User

WDC User

Data.com User Type

Data.com Monthly Addition Limit

Accessibility Mode (Classic Only)

High Contrast Palette on Charts

Load Lightning Pages While Scrolling

Debug Mode

Required Information

Setup Home Object Manager

Search Setup

user

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Service

Embedded Service

Messaging for In-App and Web User

User Interface

Action Link Templates

Actions & Recommendations

App Menu

## Setup Users

### New User

User Edit Save Save & New Cancel

General Information

First Name madhu

Last Name b

Alias mb

Email 2620cse175@knot.ac.in

Username 2620cse175@knot.ac.in

Nickname User169616842426654192

Title worker

Company knot bank

Department Sales

Division

Role

User License Salesforce Platform

Profile salesmanage

Active

Marketing User

Offline User

Knowledge User

Flow User

Service Cloud User

Site.com Contributor User

Site.com Publisher User

WDC User

Data.com User Type

Data.com Monthly Addition Limit

Accessibility Mode (Classic Only)

High Contrast Palette on Charts

Load Lightning Pages While Scrolling

Debug Mode

Required Information

Setup Home Object Manager

Search Setup

user

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Service

Embedded Service

Messaging for In-App and Web User

Verification

User Interface

Action Link Templates

Actions & Recommendations

App Menu

SETUP Users

Mailing Address

Street

City

Zip/Postal Code

Status/Province

Country

Single Sign On Information

Federation ID

Locale Settings

Time Zone (GMT+05:30) India Standard Time (Asia/Kolkata)

Locale English (India)

Language English

Approver Settings

Delegated Approver

Manager

Recycle Approval Request Emails Only if I am an approver

Generate new password and notify user immediately

Save Save & Now Cancel

Setup Home Object Manager

Search Setup

user

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Service

Embedded Service

Messaging for In-App and Web User

Verification

User Interface

Action Link Templates

Actions & Recommendations

App Menu

SETUP Users

Mailing Address

Street 4/104 - aryanpatnam, chamasolapuram...

City SALEM

Zip/Postal Code 636308

Status/Province TAMIL NADU

Country

Single Sign On Information

Federation ID

Locale Settings

Time Zone (GMT+05:30) India Standard Time (Asia/Kolkata)

Locale English (India)

Language English

Approver Settings

Delegated Approver

Manager

Recycle Approval Request Emails Only if I am an approver

Generate new password and notify user immediately

Save Save & Now Cancel



Setup Home Object Manager

Search Setup

user

Users

User madhu b

Permission Set Assignments (0) | Permission Set Assignments Activation Required (0) | Permission Set Group Assignments (0) | Permission Set License Assignments (0) | Personal Groups (0) | Public Group Membership (0) | Queue Membership (0) | Team (0) | Managers in the Role Hierarchy (0) | OAuth Apps (0) | Third-Party Account Links (0) | Installed Mobile Apps (0) | Authentication Settings for External Systems (0) | Login History (0) | User Provisioning Accounts (0)

User Detail

Name: madhu b | Edit | Sharing | Reset Password | Login | Freeze

Name	madhu b	Role	Salesforce Platform
Alias	mb	User License	salesman
Email	2k2Dcs17a@kic.ac.in (Madhu)	Profile	Active
Username	2k2Dcs17a@kic.ac.in	Marketing User	<input type="checkbox"/>
Nickname	User16901684242065419206	Offline User	<input type="checkbox"/>
Title	work	Knowledge User	<input type="checkbox"/>
Company	kic bank	Flow User	<input type="checkbox"/>
Department	Sales	Service Cloud User	<input type="checkbox"/>
Division		Site.com Contributor User	<input type="checkbox"/>
Address	4/154, arimamathayam, utramasapuram, Parakkodu, salem- 636308, SALEM 636308, TAMIL NADU	Slack.com Publisher User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	WDC User	<input type="checkbox"/>
Locale	English (India)	Mobile Push Registrations	Web
Language	English	Data.com User Type	<input type="checkbox"/>
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/>
Delegated Approver	Gray IT email approver	Debug Mode	<input type="checkbox"/>
Resolve Approval Request Emails		High-Contrast Palette on Charts	<input type="checkbox"/>
Federation ID		Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>
App Registration One-Time Password Authentication			

mail.google.com/mail/u/0/#inbox/FMfopGtsStlSsqKkLzCghDnsOxvlt

Search in mail

Active

KNOWLEDGE

Welcome to Salesforce!

Click below to verify your account.

Verify Account

To easily log in later, save this URL:

<https://artificialintelligence-d-dev-ed.developo.my.salesforce.com>

Username:

[2k2Dcs17a@kic.ac.in](mailto:2k2Dcs17a@kic.ac.in)

Again, welcome to Salesforce!

© Copyright 2000-2018 salesforce.com, inc. All rights reserved. Various trademarks held by their respective owners.

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/.../system/security/ChangePassword?retURL=%2Fhome%2Fhome.jsp%26fromFrontdoor=1&stupid=ChangePa...

**salesforce**

### Change Your Password

Enter a new password for **2k20cst@klot.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.../list?filterName=Recent

**MECW** Bank customers Home

Search...

**Bank: Recently Viewed**

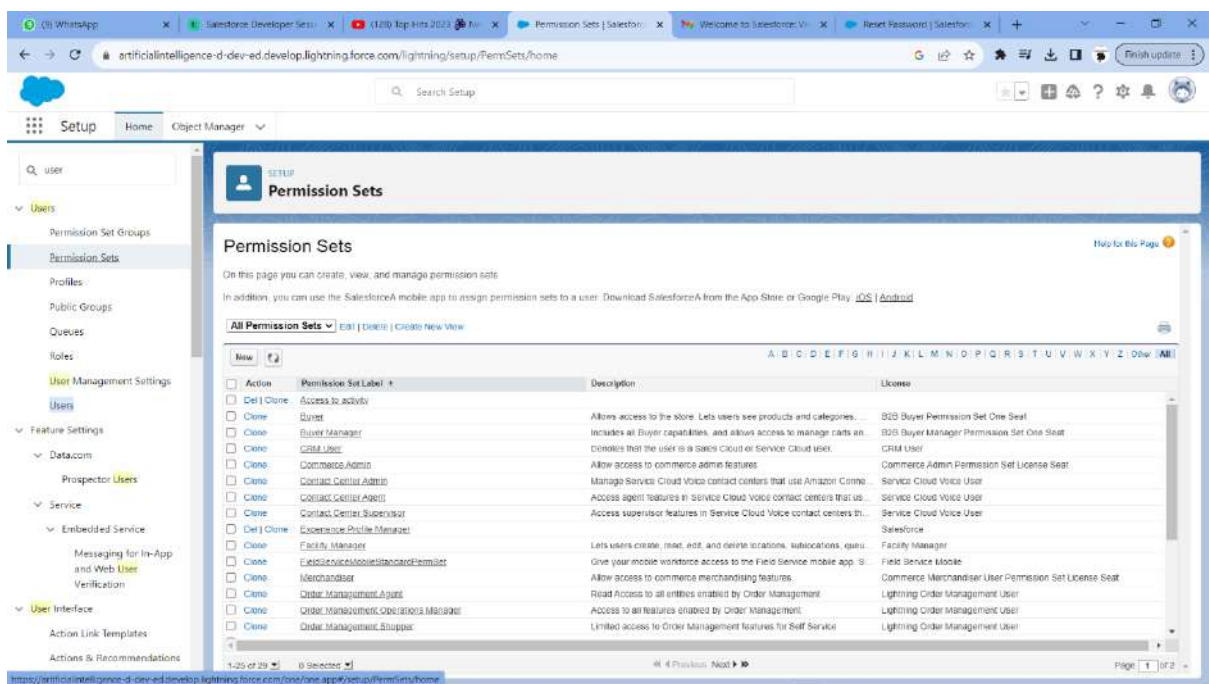
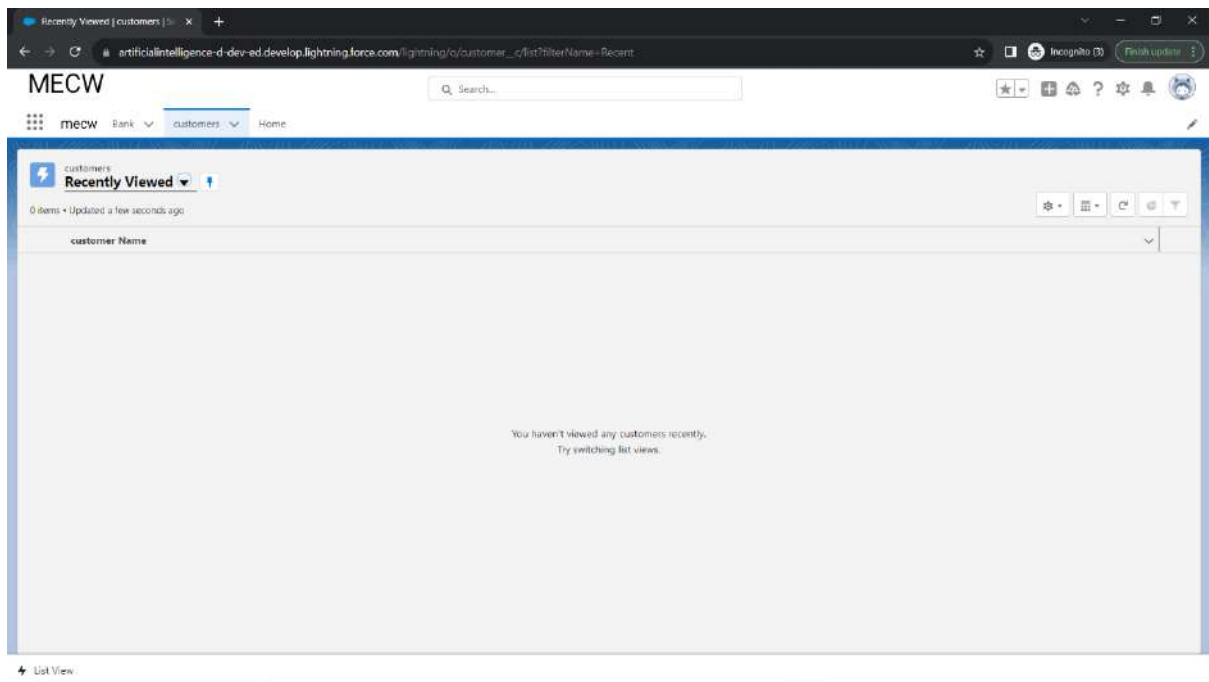
0 items • Updated a few seconds ago

Bank Name

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

List View





## 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 I-Jser A and I-Jser 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 IJser 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:

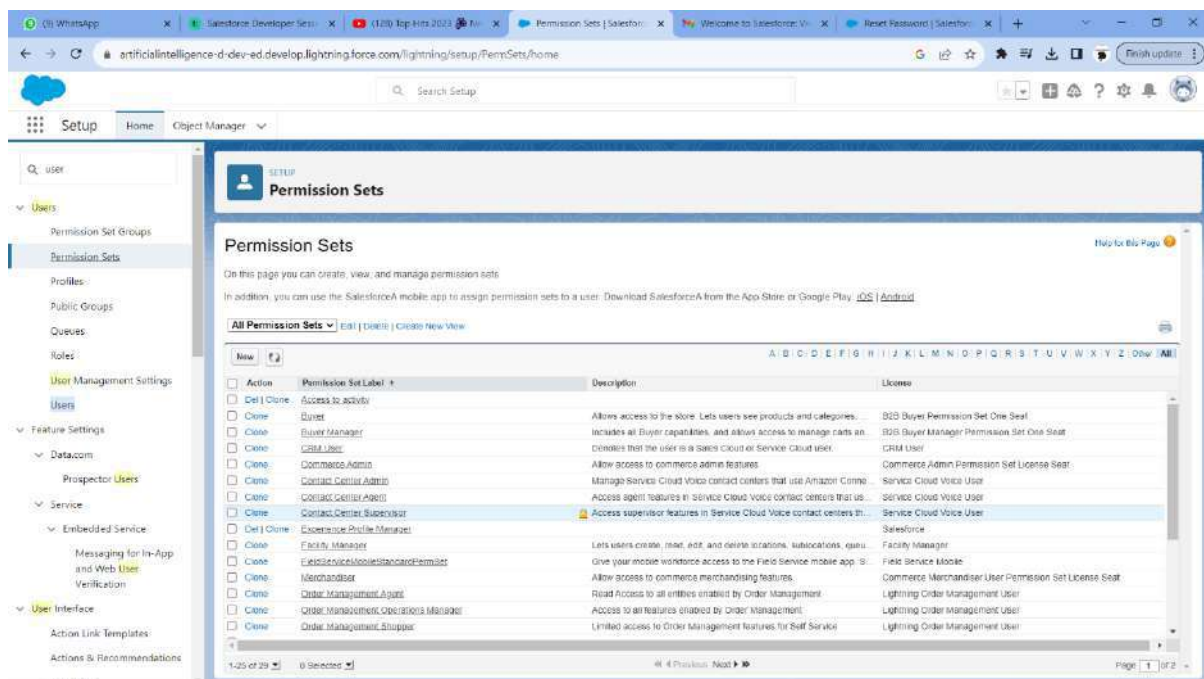
- Ensure that the Account records are owned by the respective users, with User A owning their records and User B owning their records.

## Organization-Wide Defaults:

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

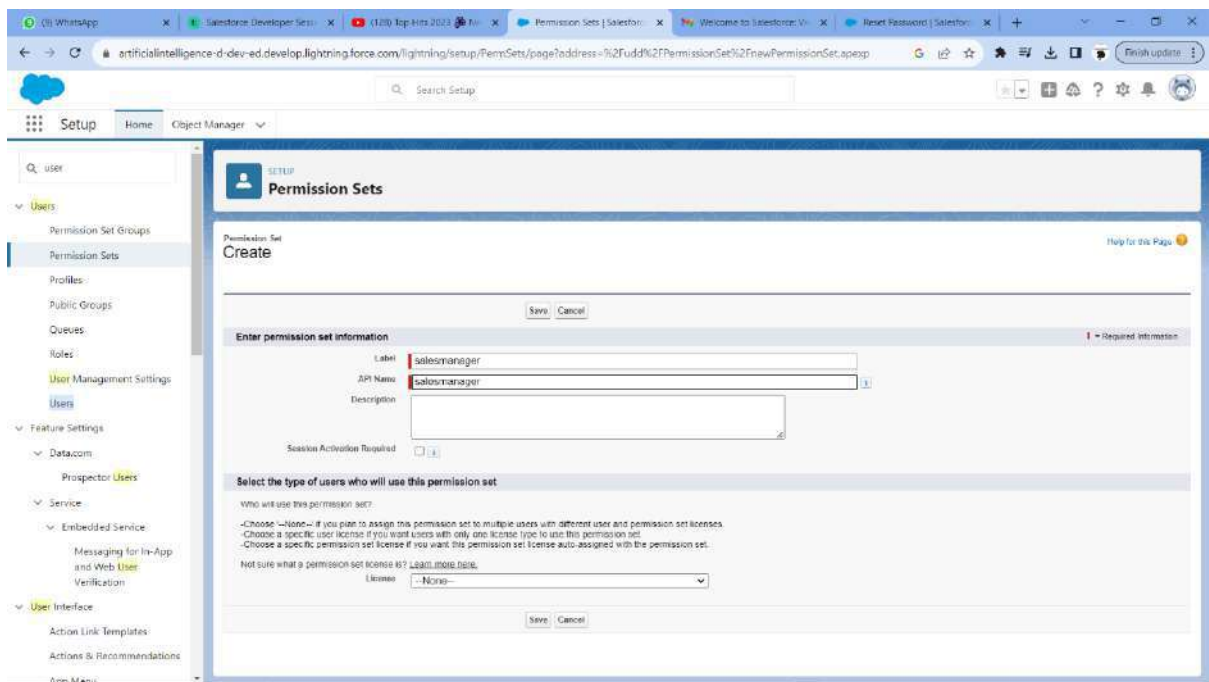
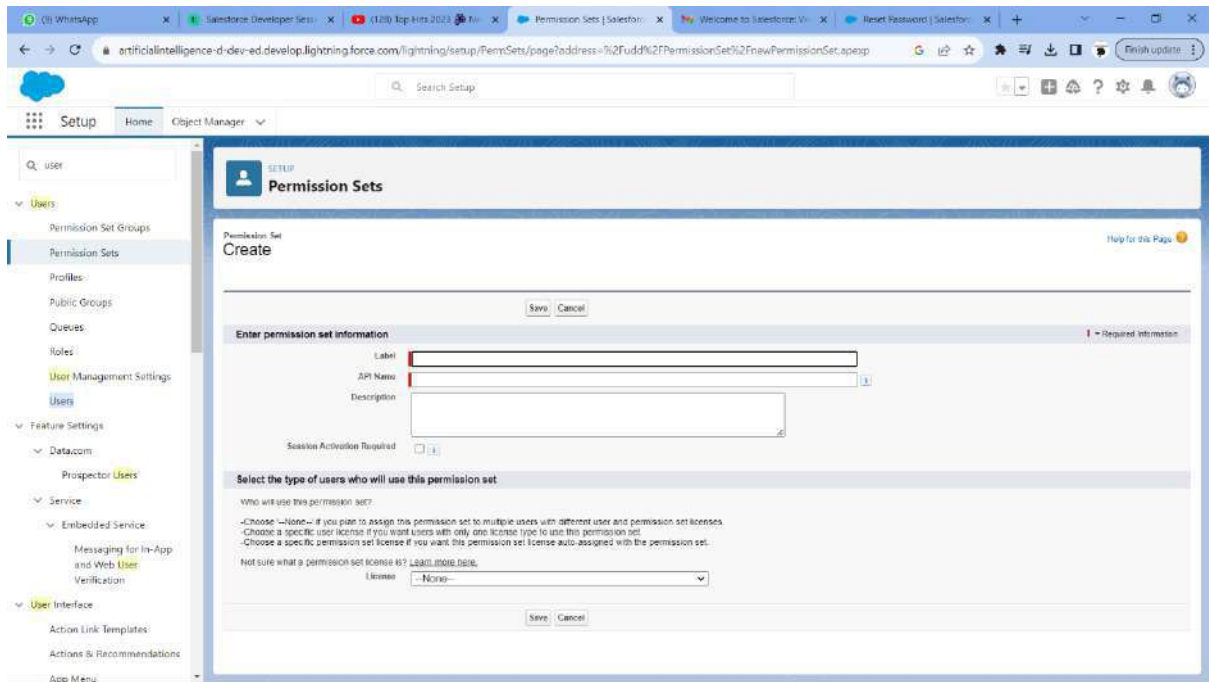
## Testing:

- 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. The left sidebar contains a navigation menu with options like Setup, Home, Object Manager, Users, Permission Set Groups, Profiles, Public Groups, Queues, Roles, User Management Settings, Users, Feature Settings, Datacom, Prospector Users, Service, Embedded Service, Messaging for In-App and Web User, Verification, User Interface, Action Link Templates, Actions & Recommendations, and App Menu. The main content area is titled 'Permission Sets' and includes a search bar, a 'New' button, and a table of existing permission sets.

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



Setup Home Object Manager

user

Users

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

Feature Settings

- Data.com
- Prospector Users
- Service
- Embedded Service
- Messaging for In-App and Web User
- User Interface
- Action Link Templates
- Actions & Recommendations
- App Menu

Permission Set

salesmanager

Find Settings... Clone Delete Edit Properties Manage Assignments

Permission Set Overview

Description

License

Session Activation Required

Last Modified By

API Name

Namespace Prefix

Created By

Apps

Assigned Apps

Assigned Connected Apps

Object Settings

App Permissions

Apex Class Access

Visualforce Page Access

External Data Source Access

Flow Access

Setup Home Object Manager

user

Users

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

Feature Settings

- Data.com
- Prospector Users
- Service
- Embedded Service
- Messaging for In-App and Web User
- User Interface
- Action Link Templates
- Actions & Recommendations
- App Menu

Permission Set

salesmanager

Find Settings... Clone Delete Edit Properties Manage Assignments

Permission Set Overview > Object Settings

Object Settings

Object Name	Object Permissions	Total Fields	Tab Settings
Accounts	No Access	40	—
AI Insights Reasons	No Access	—	—
AI Recent Insights	No Access	—	—
Alternative Payroll Methods	No Access	27	—
API Anonymous Event Stores	No Access	14	—
App Analytics Query Requests	No Access	—	—
Application Usage Assignments	No Access	—	—
Appointment Categories	No Access	9	—
Appointment Invitations	No Access	17	—
Appointments Invited	—	4	—
Appointment Schedule Assignments	No Access	—	—
Appointment Schedule Logs	No Access	—	—
Appointment Topic Time Slots	No Access	6	—
Asset Actions	No Access	50	—
Asset Action Sources	No Access	18	—
Asset Relationships	—	10	—
Assets	No Access	42	—
Asset State Periods	No Access	11	—

Setup Home Object Manager

user

Users

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

Feature Settings

- Data.com
- Prospector Users
- Service
- Embedded Service
- Messaging for In-App and Web User
- Verification

User Interface

- Action Link Templates
- Actions & Recommendations

Permission Sets

Permission Set: salesmanager

Find Settings... Close Delete Edit Properties Manage Assignments

Permission Set Overview > Object Settings Bank

Bank Edit

Tab Settings

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

Object Permissions

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

Field Permissions

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

https://artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0P55000000Phok%3F%3DEntityPermissions%26o%3D...

Setup Home Object Manager

user

Users

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

Feature Settings

- Data.com
- Prospector Users
- Service
- Embedded Service
- Messaging for In-App and Web User
- Verification

User Interface

- Action Link Templates
- Actions & Recommendations
- App Menu

Permission Sets

Permission Set: salesmanager

Find Settings... Close Delete Edit Properties Manage Assignments

Permission Set Overview > Object Settings Bank

Bank Save Cancel

Tab Settings

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

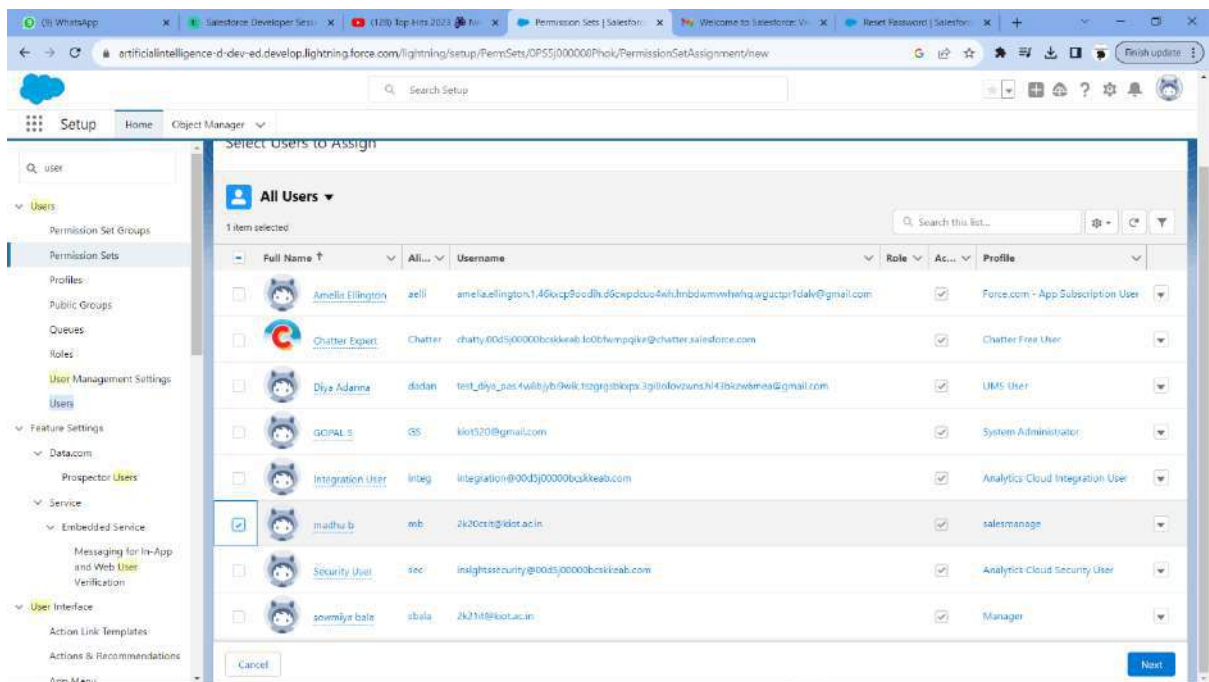
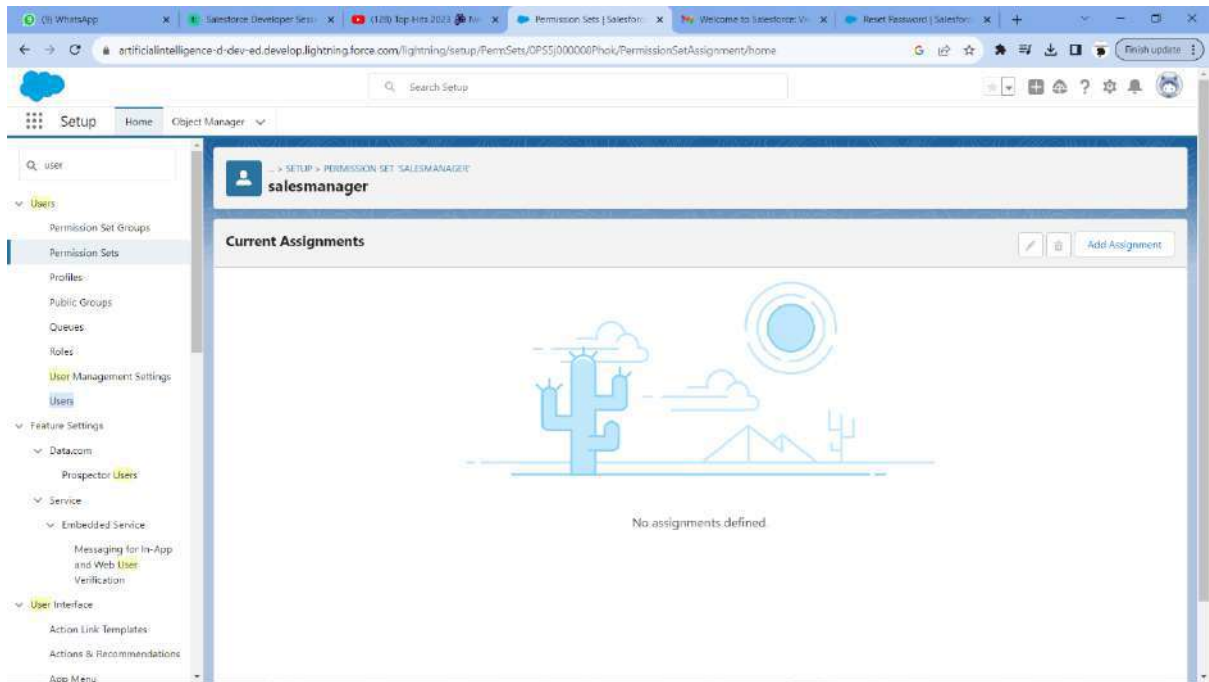
Object Permissions

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"/>

Field Permissions

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





artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/0PSJ000008Phok/PermissionSetAssignment/new

Setup Home Object Manager

Search Setup

user

Users

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

Feature Settings

- Data.com
- Prospector Users
- Service
- Embedded Service
- Messaging for In-App and Web User Verification

User Interface

- Action Link Templates
- Actions & Recommendations
- App Menu

### Select 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 Back Assign

artificialintelligence-d-dev-ed.develop.lightning.force.com/one/one.app#eyJjb21wb25lbnRZcWY0LzZXR1cF9wbG0Zm0yYV9wZWZhc2R7S2XN1blFRQWdlldw...

Setup Home Object Manager

Search Setup

user

Users

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

Feature Settings

- Data.com
- Prospector Users
- Service
- Embedded Service
- Messaging for In-App and Web User Verification

User Interface

- Action Link Templates
- Actions & Recommendations
- App Menu

PERMISSION SET: SALESMAAN

1 assignments were successful.

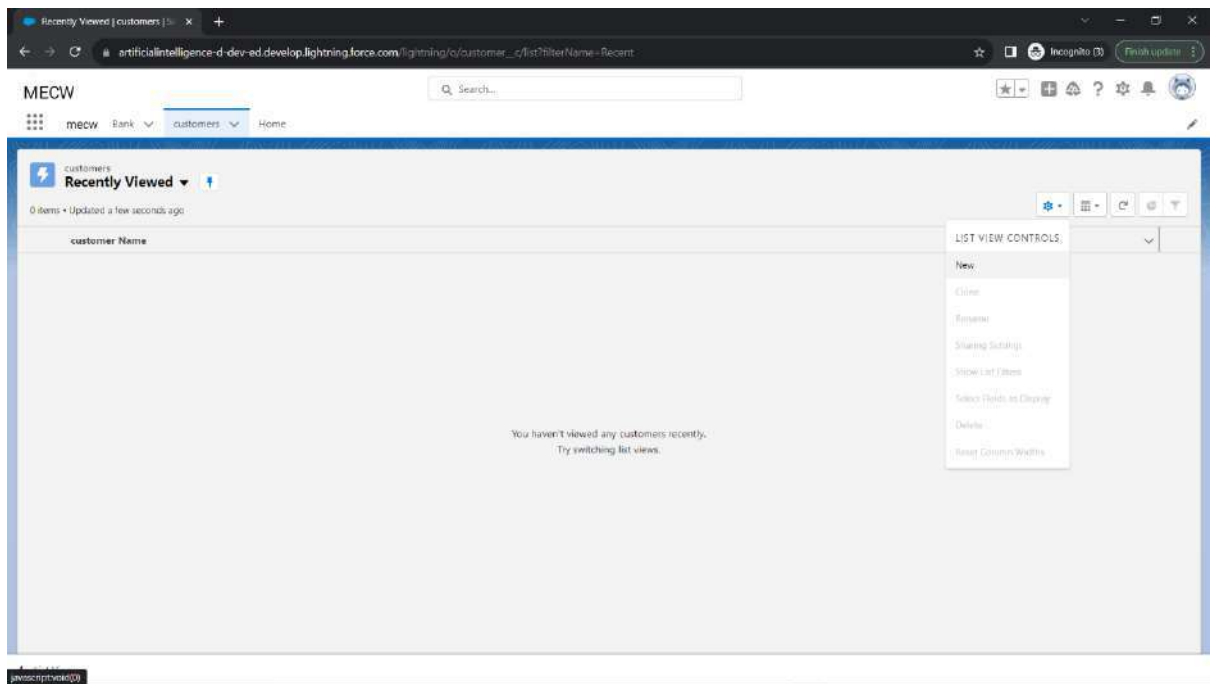
salesmanager

### Assignment Summary

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

Done



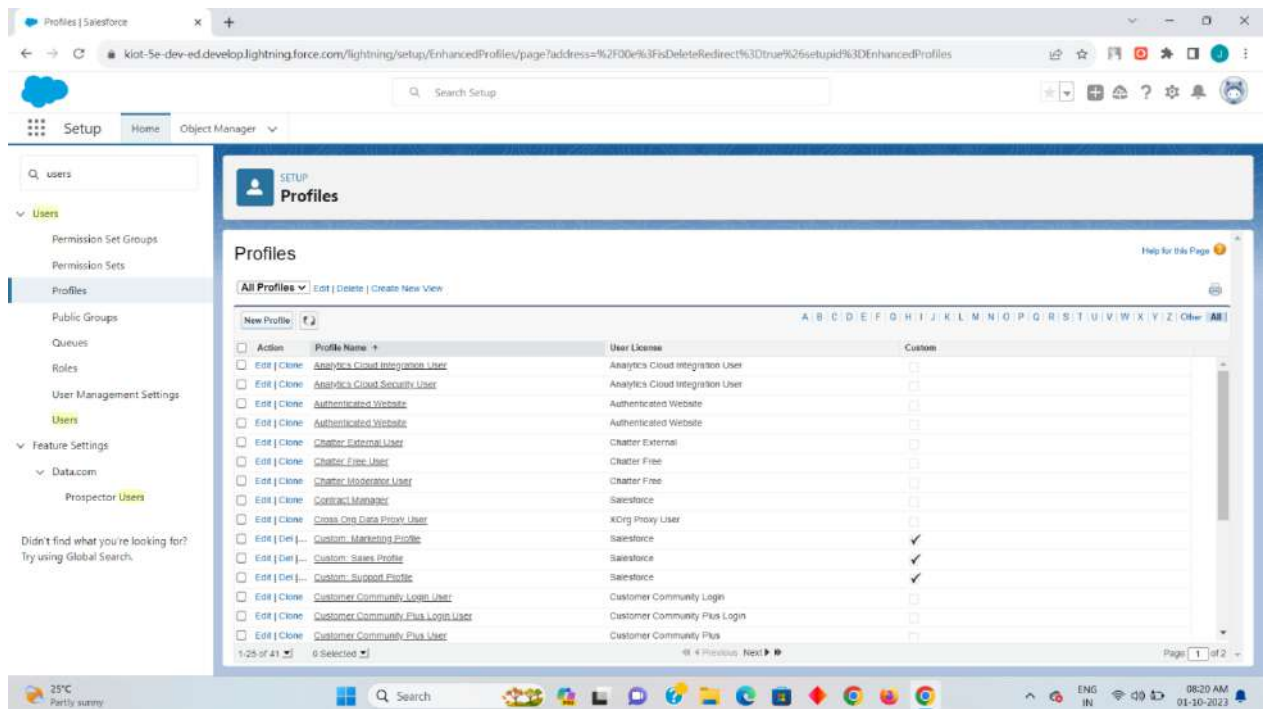


3. . Suppose there are 2 Users and they are having Create, Read, Edit access on Account Object with the same profile but we want to open up the access for one user to delete how will you implement the Security setting.

Solution:

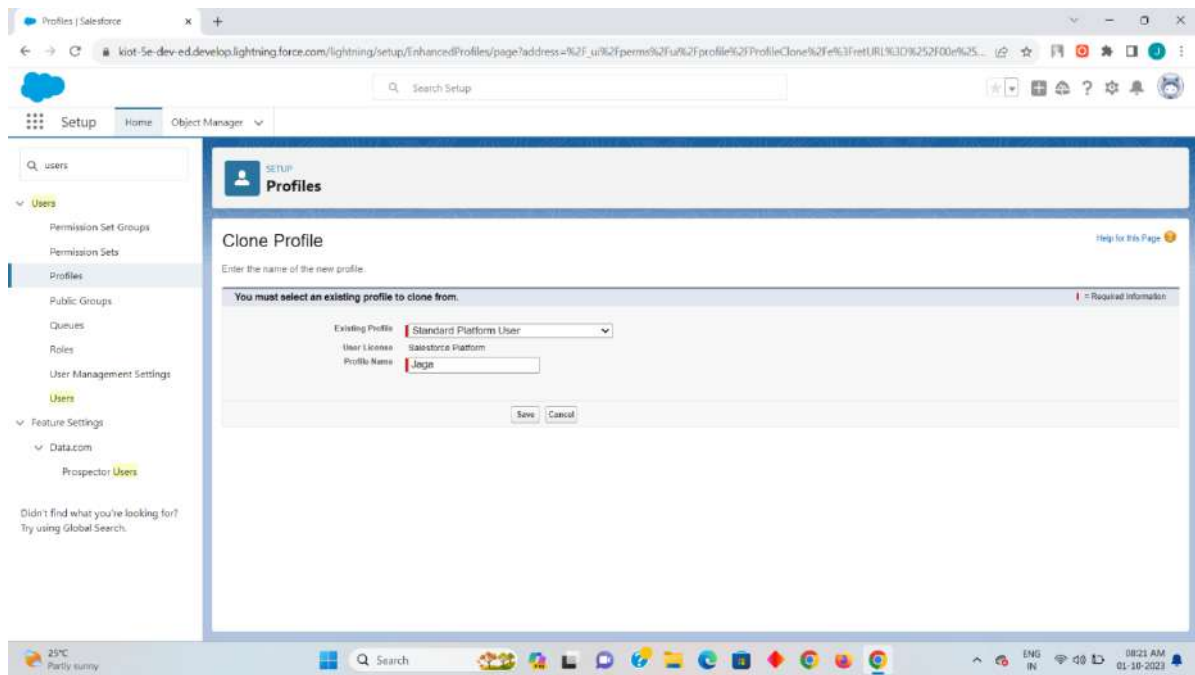
Step 1: we need create a profile for the two user which has the access to Create, Read, Edit for follow as per.

Setup-quick search[profile]



Step 2:

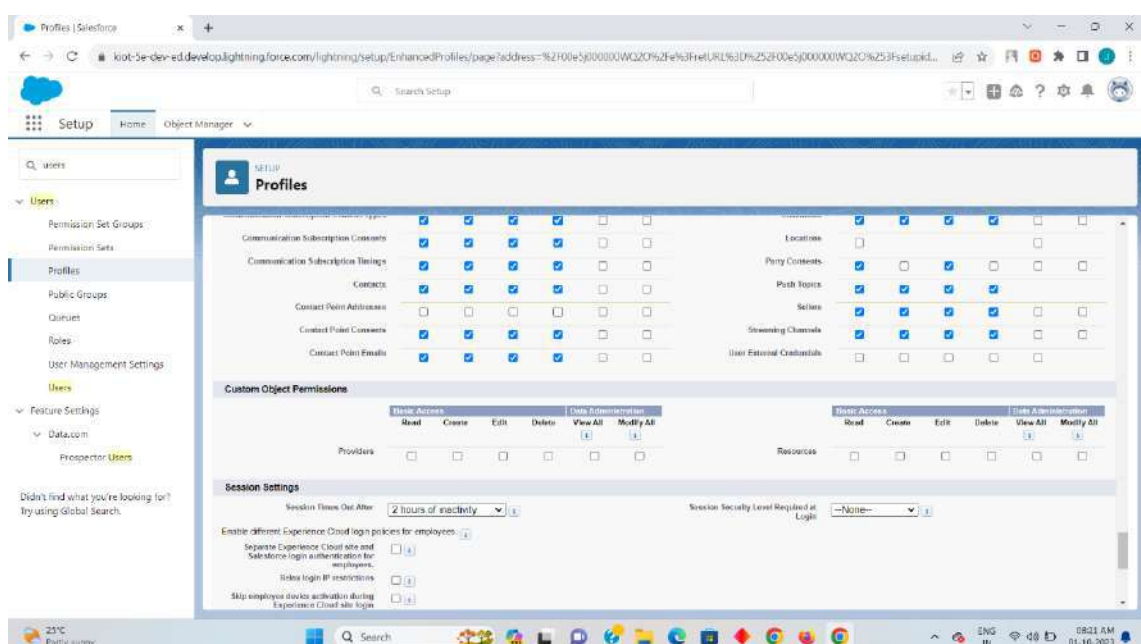
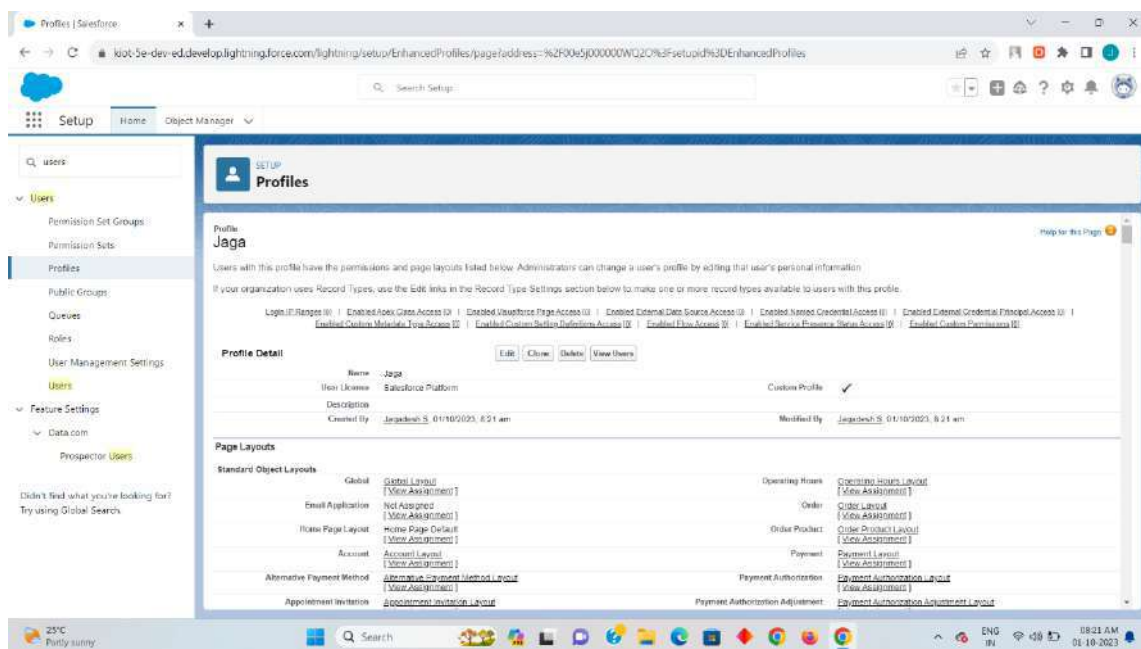
Click on the new to create a new profile along with the label and Api



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

Search Setup

Setup Home Object Manager

users

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 Consents

	Read	Create	Edit	Delete	View All	Modify All
Communication Subscription Consents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Communication Subscription Timings	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contacts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contact Point Addresses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Consents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contact Point Emails	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Custom Object Permissions

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

Rules login IP restrictions.

Skip employee device activation during Experience Cloud site login.

Profiles | Salesforce

Search Setup

Setup Home Object Manager

users

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

Profile Edit

Name: Jaga

User License: Salesforce Platform

Description:

Custom Profile: ☒

Custom App Settings

	Visible	Default
Analytics Studio (standard__Analytics)	<input type="checkbox"/>	<input type="radio"/>
App Launcher (standard__AppLauncher)	<input type="checkbox"/>	<input type="radio"/>
Flow App (Flow_App)	<input checked="" type="checkbox"/>	<input type="radio"/>
Platform (standard__Platform)	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>
WCX (standard__Work)	<input type="checkbox"/>	<input type="radio"/>

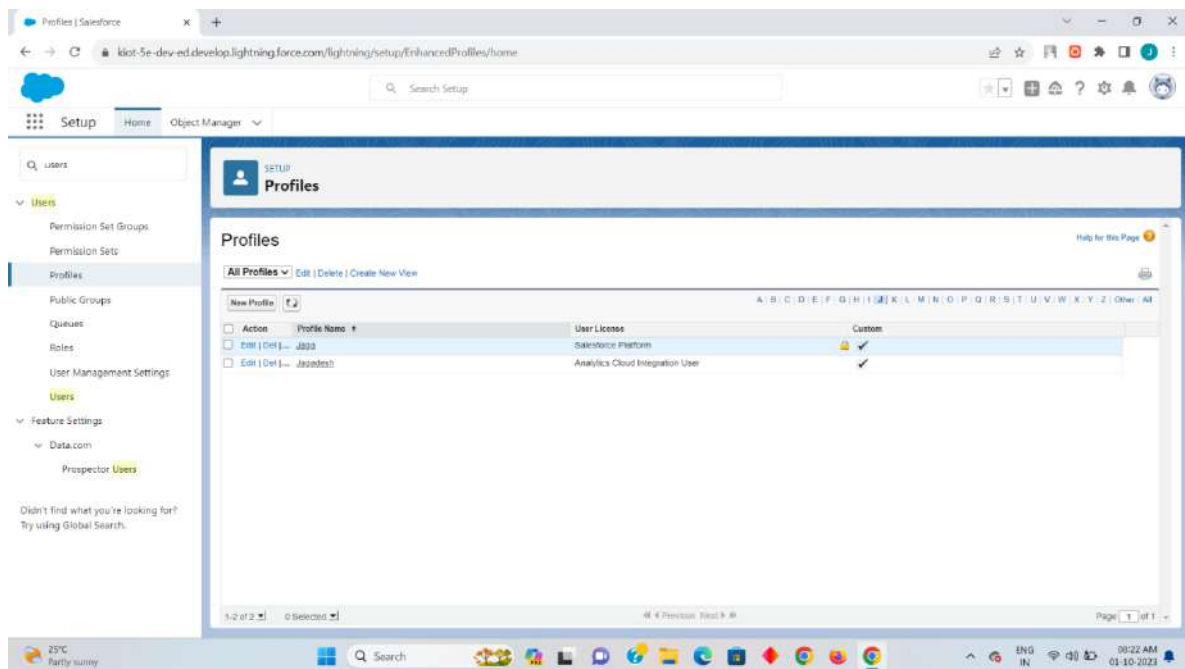
Service Provider Access

Tab Settings

☐ Override users' personal tab customizations

## 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

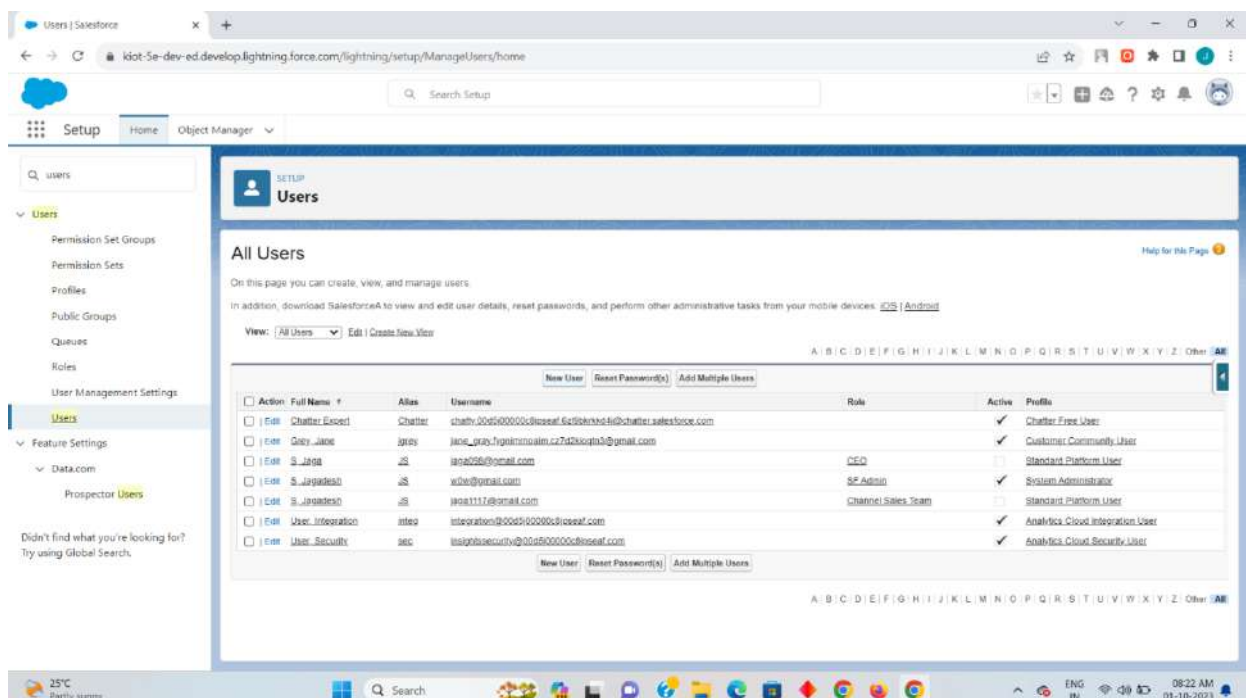


The screenshot shows the Salesforce Setup interface for Profiles. The left sidebar contains navigation options like Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, and User Management Settings. The main content area displays the Profiles page with a table of profiles. The table has columns for Action, Profile Name, User License, and Custom. Two profiles are listed: 'Jaga' and 'Jagadash'. The 'Jaga' profile is selected, and its details are shown in a modal window.

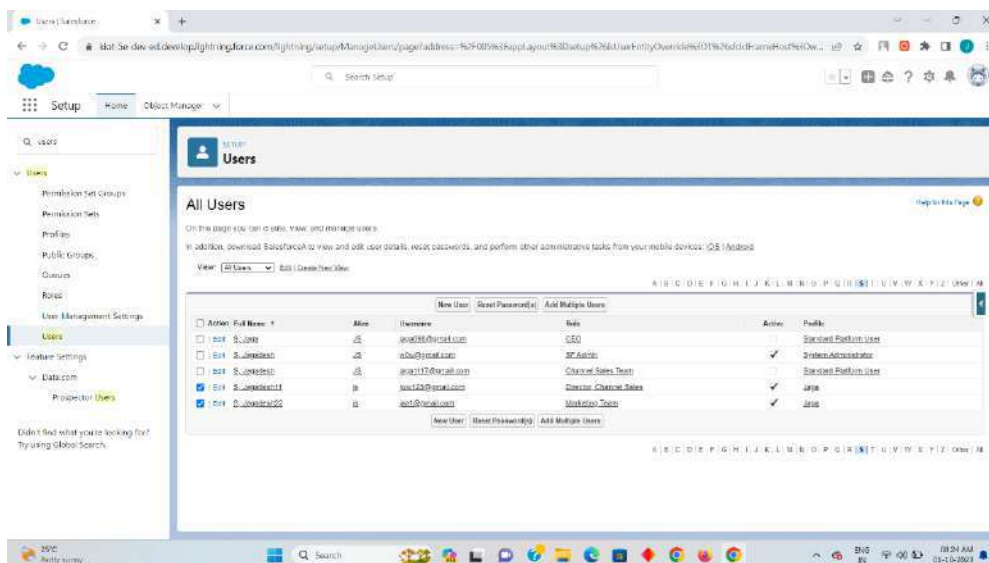
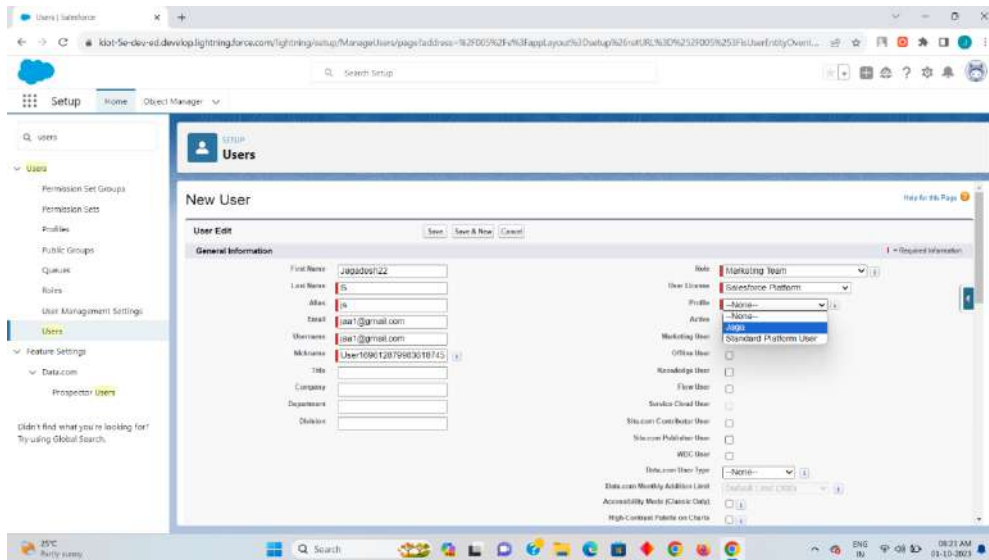
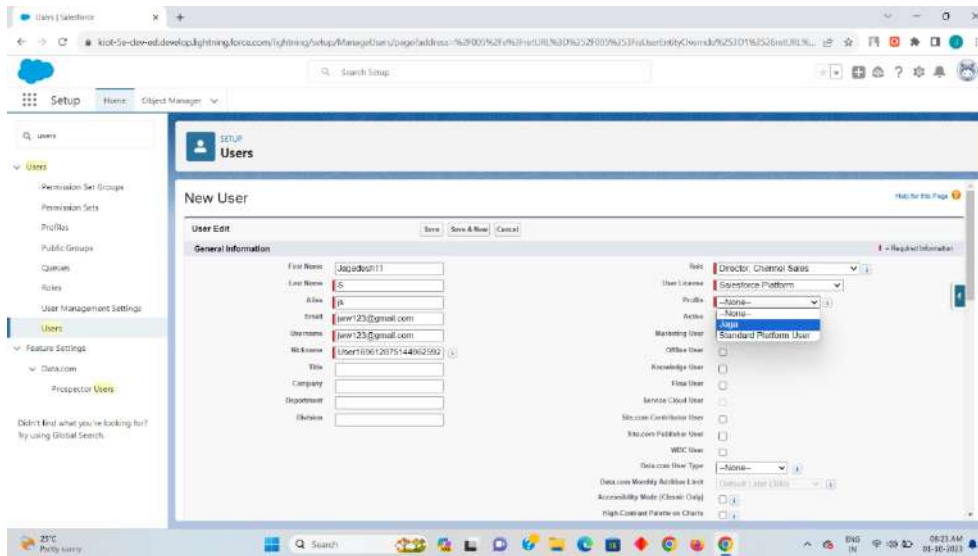
Action	Profile Name	User License	Custom
<input type="checkbox"/>	Jaga	Salesforce Platform	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Jagadash	Analytics Cloud Integration User	<input checked="" type="checkbox"/>

## 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.







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

### Step 6:

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

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



Permission Sets | Salesforce

kiot-5e-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0F55J000000Pta%3Fsf%3DFrameOrigins%3Dhttps%253A%2F52F%252Fkiot-5e-dev-ed.devel...

Setup Home Object Manager

users

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.

### Permission Sets

permission12

Find Settings... Close Delete Edit Properties Manage Assignments

#### Permission Set Overview

Owner	Admin	API Name	permission12
License		Namespace Prefix	
Session Activation Required	<input type="checkbox"/>	Created By	ajagubhat@_ 01/10/2023, 8:24 am
Last Modified By	ajagubhat@_ 01/10/2023, 9:24:59		

#### 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 [visibility](#).

**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**

Permission Sets | Salesforce

kiot-5e-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0F55J000000Pta%3Fsf%3DFrameOrigins%3Dhttps%253A%2F52F%252Fkiot-5e-dev-ed.devel...

Setup Home Object Manager

users

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.

### Permission Sets

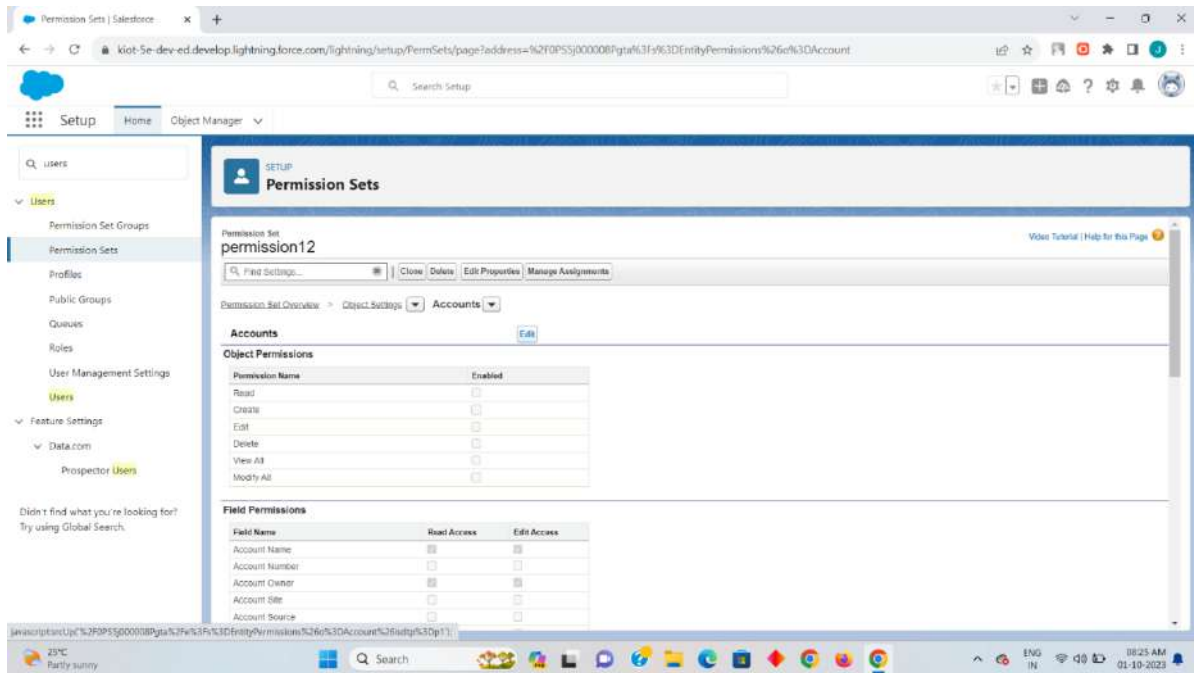
permission12

Find Settings... Close Delete Edit Properties Manage Assignments

Permission Set Overview Object Settings

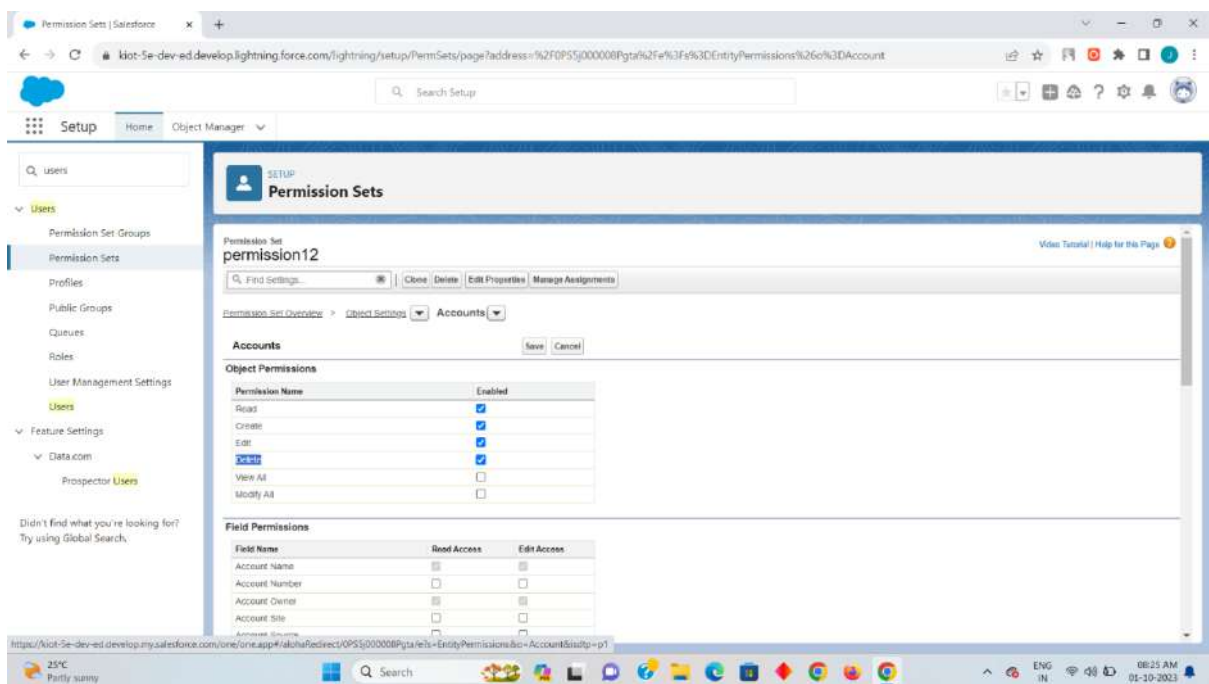
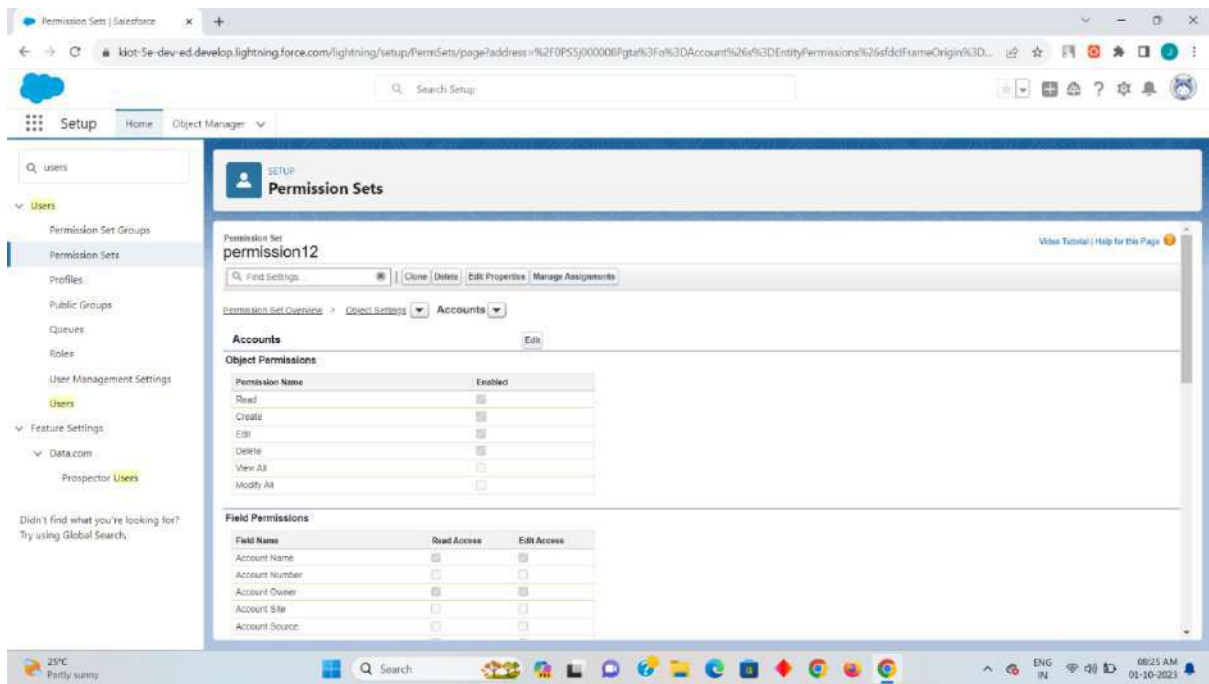
#### Object Settings

Object Name	Object Permissions	Total Fields	Tab Settings
Account	No Access	9	---
Account Contacts	No Access	44	---
Account Relationships	No Access	---	---
AI Record Insights	No Access	---	---
Alternative Payment Methods	No Access	27	---
API Automate Event Status	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 Invites	---	4	---
Appointment Schedule Appointments	No Access	---	---
Appointment Schedule Logs	No Access	---	---
Appointment Topic Time Slots	No Access	8	---
Asset Actions	No Access	30	---
Asset Action Sources	No Access	18	---



## Step 7:

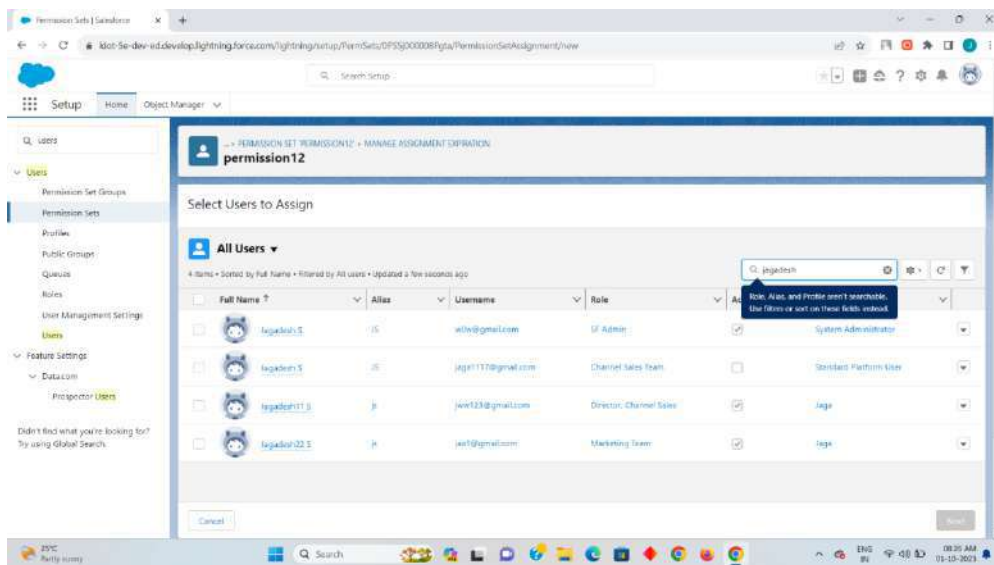
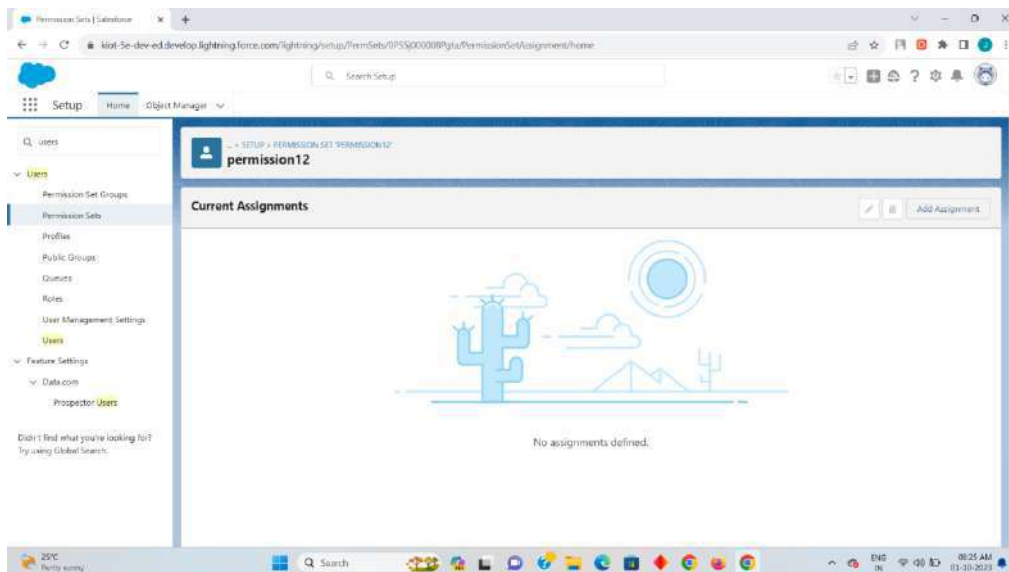
Now to give the specific delete access to the user click on edit on the Account and then enable the read, create, edit and the delete on it so that the permission set will have a specific special access on it. once it has been done click on save and then click on manage assignment.



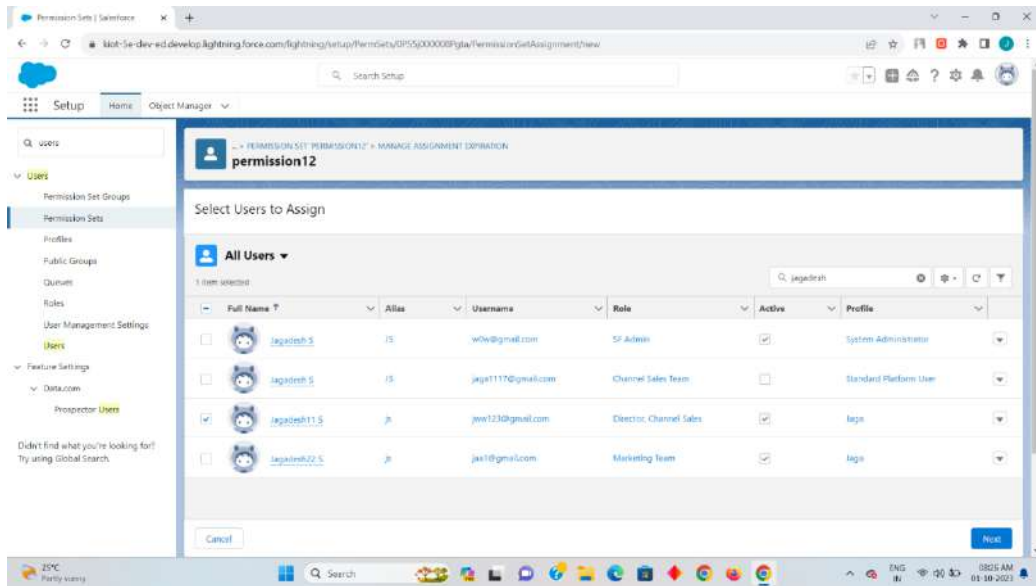
## Step 8

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

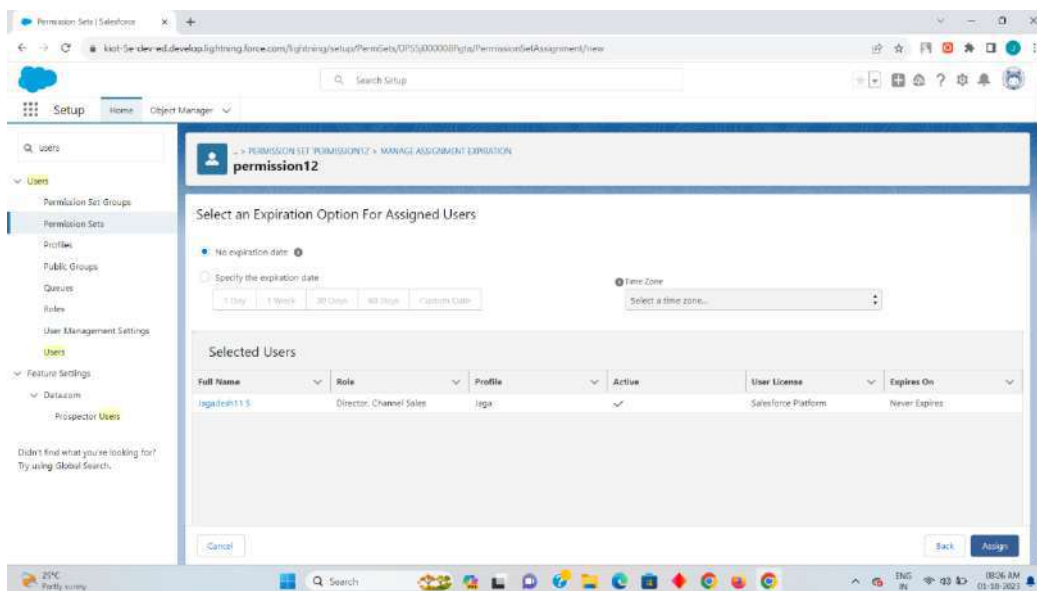
selected user can have a special access as delete on it.





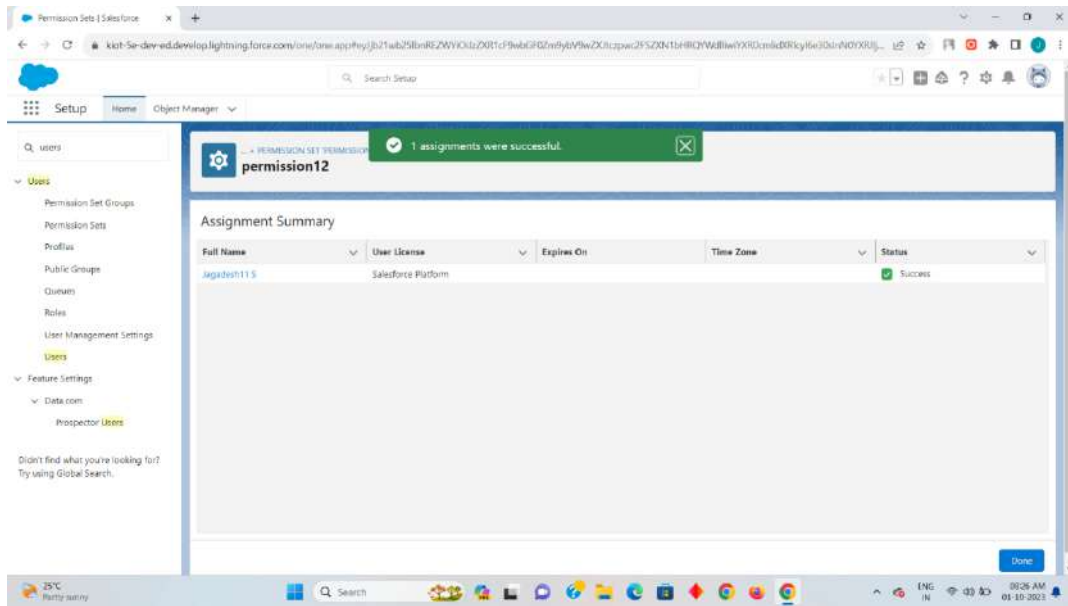


Click on next.



Now click on Assign.





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

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

Solution:

### Step 1: Create a Custom Object

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

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

SETUP > OBJECT MANAGER

Survey Result

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Search Layouts for Salesforce Classic

Triggers

Validation Rules

Fields & Relationships

Quick Find

NewDeleted FieldsField DependenciesSet History Tracking

8 Items, Sorted by

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Comment	Comment__c	Text Area(255)		
Created By	CreatedById	Lookup(User)		
Email	Email__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name__c	Text(51)		
Owner	OwnerId	Lookup(User,Group)		✓
Rating	Rating__c	Picklist		
Survey Result Name	Name	Auto Number		✓

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

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

screenshot.

The screenshot shows the 'Email Template - Thank You Email - Survey' interface. At the top, there are tabs for 'Details' and 'Related', with 'Details' selected. Below this is the 'Information' section, which contains fields for 'Email Template Name' (Thank You Email - Survey), 'Description', 'Related Entity Type' (Survey Result), 'Folder' (Public Email Templates), and a checkbox for 'Made in Email Template Builder' (checked). The 'Message Content' section follows, with fields for 'Subject' (Thank You For Completing Our Survey!), 'Enhanced Letterhead', and 'HTML Value'. The 'HTML Value' field contains a preview of the email content, including a greeting, a thank-you message, and a signature. At the bottom, the 'Additional Information' section shows 'Created By' (Rakesh Gupta, 12/21/2020, 4:23 PM) and 'Last Modified By' (Rakesh Gupta, 12/21/2020, 4:32 PM).

Email Template - Thank You Email - Survey

Edit in Builder Edit Clone

Details Related

Information

Email Template Name  
Thank You Email - Survey

Description

Made in Email Template Builder  
☒

Related Entity Type  
Survey Result

Folder  
Public Email Templates

Message Content

Subject  
Thank You For Completing Our Survey!

Enhanced Letterhead

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**

**Edit Email Alert** ! = Required Information

Description ! Survey - Thank You Email

Unique Name ! Survey\_Thank\_You\_Email [i](#)

Object Survey Result

Email Template ! Thank You Email - Survey [Q](#)

Protected Component ☐

Recipient Type ! Search: User ! for:

Recipients

Available Recipients		Selected Recipients
User: Integration User User: Rakesh Gupta User: Security User	Add <input type="button" value="➔"/> Remove <input type="button" value="➔"/>	Email Field: Email

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

Additional Emails

From Email Address ! Current User's email address !  
☐ Make this address the default From email address for this object's email alerts. [i](#)

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

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

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

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

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

Edit Create Records

Create Salesforce records using values from the flow.

\* Label  \* API Name

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

Set Field Values for the Survey Result

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

[+ Add Field](#)

☐ Manually assign variables

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

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

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

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



## You Email.

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

The screenshot shows a configuration window titled "Edit 'Survey - Thank You Email' email alert". It contains a description field, a "Set Input Values" section with a "Record ID" field containing "{!Save\_Response}", and "Cancel" and "Done" buttons at the bottom right.

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

\* Label: Send Thank You Email

\* API Name: Send\_Thank\_You\_Email

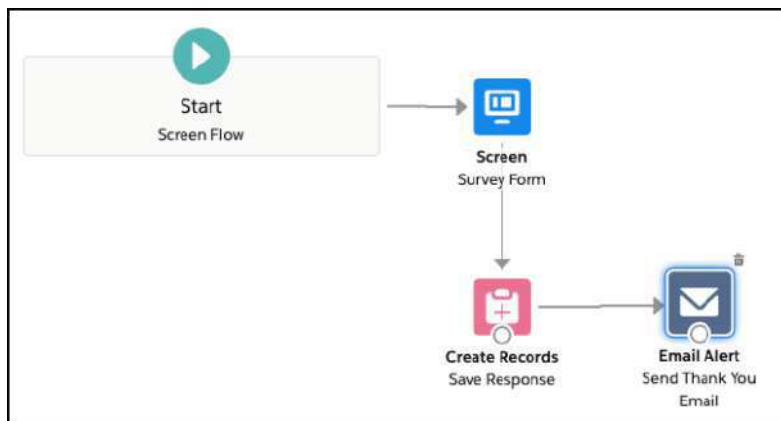
Description:

Set Input Values:

A<sub>3</sub> \* Record ID: {!Save\_Response}

Cancel Done

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



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

## Context—Depends on How Flow is Launched

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

Save as

A New Version

A New Flow

\* Flow Label

Survey

\* Flow API Name

Survey

Description

Hide Advanced

How to Run the Flow ⓘ

User or System Context—Depends on How Flow is Launched

\* Type

Screen Flow

\* API Version for Running the Flow

51

Interview Label ⓘ

Insert a resource...

Survey {!\$Flow.CurrentDateTime}

Last Modified

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

Status:

Active

Type:

Screen Flow

Version Number:

2

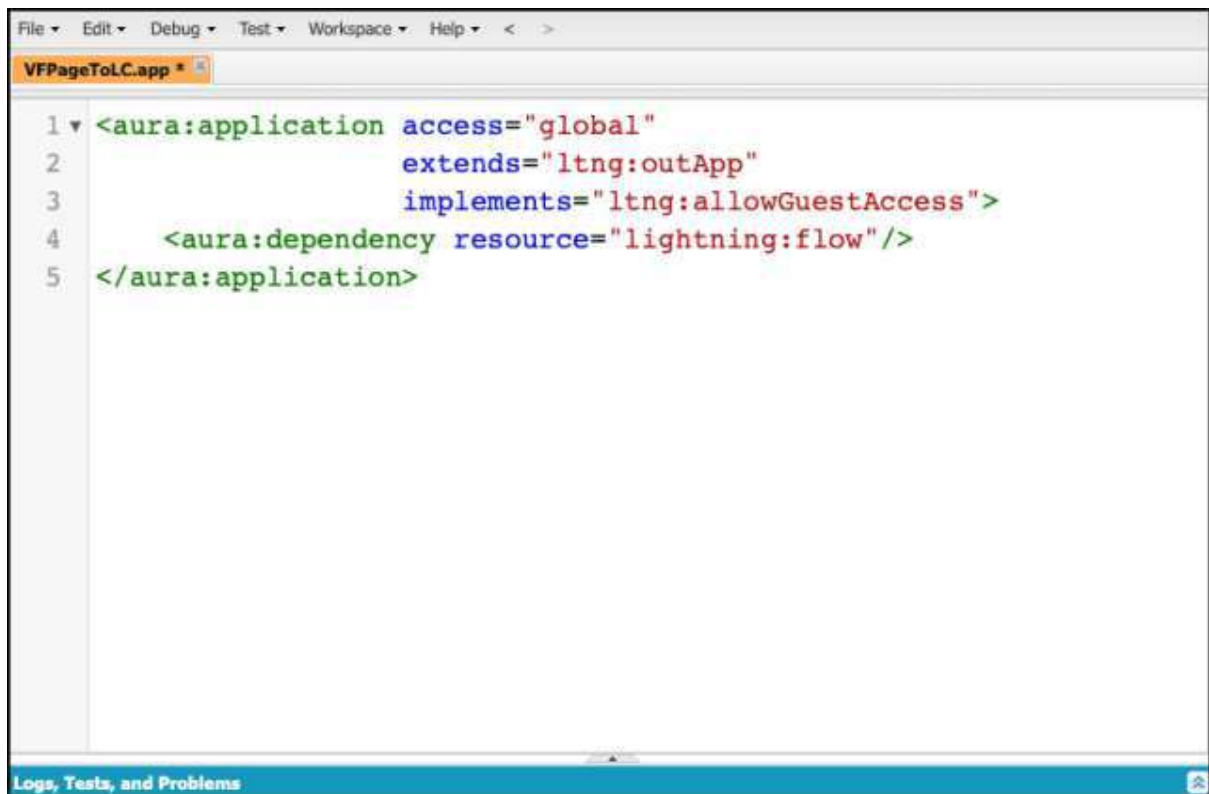
Cancel

Save

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

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

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



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

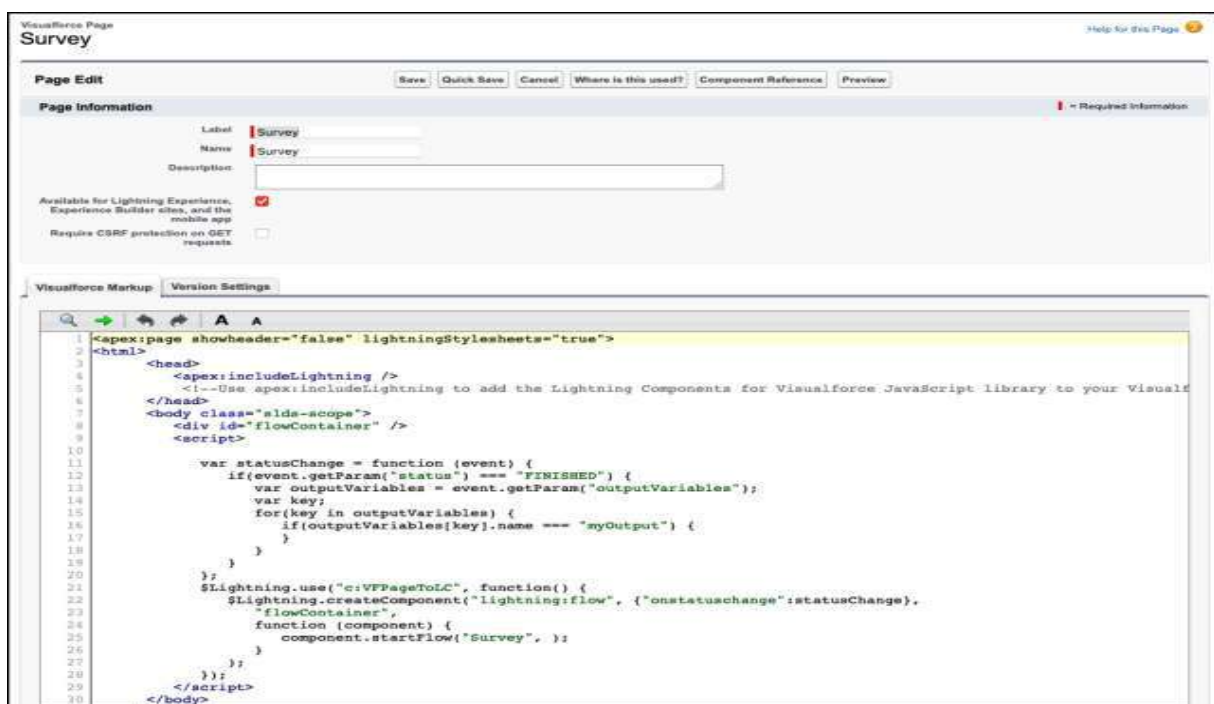
## Step 6: Create a Visualforce Page and Embed Your Flow Into It

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**.



**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' form in Salesforce. The form is titled 'Site Edit' and has 'Save' and 'Cancel' buttons at the top right. The form contains the following fields and values:

- Site Label: Survey
- Site Name: Survey
- Site Description: (Empty text area)
- Site Contact: Rakesh Gupta
- Default Record Owner: Rakesh Gupta
- Default Web Address: http://kathar-developer-edition.gus.force.com/ survey
- Active: ☒
- Active Site Home Page: Survey
- Inactive Site Home Page: InMaintenance
- 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

\* 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 b99amc6fe7r-b-cdzwnaa-gs0.bnc.salesforce.com

8:09 PM (1 minute ago)

to me

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

Reply

Forward