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Salesforce
Developer(Course)
Assignment no1

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

Solution:

Step 1: Create Custom Objects

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

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

- Header:** Includes the Salesforce logo, a search bar labeled "Search Setup", and various navigation icons.
- Breadcrumbs:** "Setup" > "Object Manager" > "New Custom Object".
- Title Bar:** "SETUP New Custom Object".
- Message Bar:** "Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles." with links to "Tell me more!" and "Don't show this message again".
- Custom Object Definition Edit:** A form with tabs "Save", "Save & New", and "Cancel".
- Custom Object Information:**
 - Label:** college (Example: Account)
 - Plural Label:** colleges (Example: Accounts)
 - Starts with vowel sound:**
- Object Name:** college (Example: Account)
- Description:** (Empty text area)
- Context-Sensitive Help Setting:**
 - Open the standard Salesforce.com Help & Training window
 - Open a window using a Visualforce page
- Content Name:** (None)
- Enter Record Name Label and Format:**
 - 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:**
 - 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

Second custom objects, let's call them
"Department_C"

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

- Header:** Includes the Salesforce logo, a search bar labeled "Search Setup", and various navigation icons.
- Breadcrumbs:** "Setup" > "Object Manager".
- Title Bar:** "Object Manager" with a "Help for this Page" link.
- Section: Custom Object Definition Edit**
 - Custom Object Information:**
 - Label: department (Example: Account)
 - Plural Label: departments (Example: Accounts)
 - Starts with vowel sound:
 - The Object Name is used when referencing the object via the API.
 - Object Name: department (Example: Account)
 - Description: (Empty text area)
 - Context-Sensitive Help Setting:
 - Open the standard Salesforce.com Help & Training window
 - Open a window using a Visualforce page
 - Content Name: (None)
- Section: 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: Department Name (Example: Account Name)
 - Data Type: Text
- Section: Optional Features**
 - Allow Reports
 - Allow Activities
 - Track Field History
 - Allow in Chatter Groups
 - Enable Licensing (Info icon)
- Section: 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
- Section: Deployment Status**
 - In Development
 - Deployed
- Section: Search Status**
 - When this setting is enabled, your users can find records of this object type when they search. [Learn more](#).
 - Allow Search
- Section: 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

Step 2: Create a Master-Detail Relationship

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

1. Goto 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 datatype.
6. Enter a label for the relationship, e.g., "Department __c."
7. Choose "Department __c" as the related object.
8. Configure other settings as needed and click "Next."
9. Specify the field-level security and add it to relevant page layouts.
10. Click "Next" and "Save" to create the relationship.

The screenshot shows the Salesforce Object Manager interface for the 'CDepartment' object. The left sidebar contains navigation links for Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, Scoping Rules, Triggers, Flow Triggers, and Validation Rules. The main details pane shows the following configuration:

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

At the top right of the details pane are 'Edit' and 'Delete' buttons.

The screenshot shows the 'New Relationship' step of the Salesforce setup wizard for the 'CDepartment' object. The left sidebar is identical to the previous screenshot. The main pane is titled 'Step 3. Enter the label and name for the lookup field' and displays the following fields:

- Field Label:** College
- Field Name:** college
- Description:** (empty text area)
- Help Text:** (empty text area)
- Child Relationship Name:** CDepartments
- Sharing Setting:** Read Only (radio button selected)
- Allow reparenting:** (checkbox) Child records can be reparented to other parent records after they are created
- Auto add to custom report type:** (checkbox) Add this field to existing custom report types that contain this entity

At the top right is a 'Help for this Page' link, and at the bottom right are 'Step 3 of 6', 'Previous', 'Next', and 'Cancel' buttons.

The screenshot shows the Salesforce Setup interface under the Object Manager section for the CDepartment object. A new relationship is being created, specifically Step 2: Choose the related object. The 'Related To' field is set to 'College'. The sidebar on the left lists various setup options like Page Layouts, Lightning Record Pages, and Field Sets.

The screenshot shows the Salesforce Setup interface under the Object Manager section for the CDepartment object. A new custom field is being created, specifically Step 1: Choose the field type. The 'Data Type' selected is 'Master-Detail Relationship'. The sidebar on the left lists various setup options like Page Layouts, Lightning Record Pages, and Field Sets.

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

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

- Header:** Search Setup, Setup, Home, Object Manager
- Breadcrumbs:** SETUP > OBJECT MANAGER CDepartment
- Left Sidebar:** Details, Fields & Relationships (selected), 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.
- Fields & Relationships:**

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)		
- Buttons:** Quick Find, New, Deleted Fields, Field Dependencies, Set History Tracking.

Setup Home Object Manager ▾

tabs

User Interface

Rename Tabs and Labels

Tabs

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

Custom Tabs

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

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

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

Web Tabs

No Web Tabs have been defined

Visualforce Tabs

No Visualforce Tabs have been defined

Lightning Component Tabs

No Lightning component tabs have been defined

Lightning Page Tabs

No Lightning Page Tabs have been defined

Setup Home Object Manager ▾

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

New Custom Field

Step 5. Add to page layouts Step 5 of 5

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

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

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

Add Field Page Layout Name
 college Layout

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

Salesforce Setup - Object Manager

college

New Custom Field

Step 4. Establish field-level security

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

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

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

Help for this Page

Step 4 of 5

Previous Next Cancel

Salesforce Setup - Object Manager

college

New Custom Field

Step 3. Define the summary calculation

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

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

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

Help for this Page

Step 3 of 5

Previous Next Cancel

college **New Custom Field**

Step 2. Enter the details

Field Label: i

Field Name: i

Description:

Help Text:

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

Step 2 of 5

Previous Next Cancel

college **New Custom Field**

Step 1. Choose the field type

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

Data Type

None Selected Select one of the data types below.

Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

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.

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

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

Step 1

Next Cancel

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar at the top right contains the text 'college'. Below the navigation is a breadcrumb trail: 'SETUP > OBJECT MANAGER college'. On the left, a sidebar lists various setup categories like 'Page Layouts', 'Lightning Record Pages', and 'Validation Rules'. The main content area is titled 'Fields & Relationships' and displays four items sorted by Field Label. A table provides details for each field:

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

Step 4: Create a Lightning App

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

8. Optionally, choose Record Pages (Lightning Record Pages).

9. Review and Save the app.

10. Assign the app to users or profiles.

11. Test the app with the assigned users.

The screenshot shows the Salesforce Setup interface for managing tabs. The left sidebar includes 'Setup', 'Home', and 'Object Manager'. The main area has a search bar and a toolbar with various icons. The 'Tabs' section is selected. A sub-section titled 'New Custom Object Tab' is shown, with a 'Step 2. Add to Profiles' header. It lists numerous user profiles and their tab visibility settings. A note at the top says: 'Choose the user profiles for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each profile.' A radio button at the top of the list is set to 'Apply one tab visibility to all profiles [Default On]'. The 'Tab Visibility' column for each profile is a dropdown menu, all of which are currently set to 'Default On'.

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

Setup Home Object Manager

tabs

User Interface Rename Tabs and Labels Tabs

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

SETUP Tabs

New Custom Object Tab

Step 1. Enter the Details Step 1 of 3

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

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

Object: college

Tab Style: Jewel

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

Splash Page Custom Link: --None--

Description:

Next Cancel

Setup Home Object Manager

tabs

User Interface Rename Tabs and Labels Tabs

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

SETUP Tabs

Step 3. Add to Custom Apps Step 3 of 3

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

Custom App	Include Tab
Platform (standard__Platform)	<input checked="" type="checkbox"/>
Sales (standard__Sales)	<input checked="" type="checkbox"/>
Service (standard__Service)	<input checked="" type="checkbox"/>
Marketing (standard__Marketing)	<input checked="" type="checkbox"/>
Sample Console (standard__ServiceConsole)	<input checked="" type="checkbox"/>
High Volume Customer Portal User	<input checked="" type="checkbox"/>
Authenticated Website User	<input checked="" type="checkbox"/>
App Launcher (standard__AppLauncher)	<input checked="" type="checkbox"/>
Community (standard__Community)	<input checked="" type="checkbox"/>
Site.com (standard__Sites)	<input checked="" type="checkbox"/>
Salesforce Chatter (standard__Chatter)	<input checked="" type="checkbox"/>
Content (standard__Content)	<input checked="" type="checkbox"/>
Analytics Studio (standard__Insights)	<input checked="" type="checkbox"/>
Sales Console (standard__LightningSalesConsole)	<input checked="" type="checkbox"/>
Service Console (standard__LightningService)	<input checked="" type="checkbox"/>
Sales (standard__LightningSales)	<input checked="" type="checkbox"/>
Lightning Usage App (standard__LightningInstrumentation)	<input checked="" type="checkbox"/>
Digital Experiences (standard__SalesforceCMS)	<input checked="" type="checkbox"/>
Queue Management (standard__QueueManagement)	<input checked="" type="checkbox"/>
Data Manager (standard__DataManager)	<input checked="" type="checkbox"/>
Bolt Solutions (standard__LightningBolt)	<input checked="" type="checkbox"/>
Salesforce Scheduler Setup (standard__LightningScheduler)	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Append tab to users' existing personal customizations	

Previous Save Cancel

Setup Home Object Manager

tabs

User Interface Rename Tabs and Labels Tabs

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

SETUP Tabs

New Custom Object Tab

Step 1. Enter the Details Step 1 of 3

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

Select an existing custom object or [create a new custom object now](#).
Object: CDepartment
Tab Style: Lightning

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.
Splash Page Custom Link: [--None--](#)

Description:

[Next](#) [Cancel](#)

Setup Home Object Manager

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 Packaging Installed Packages

SETUP Lightning Experience App Manager

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

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

[New Lightning App](#) [New Connected App](#)

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

- Header:** Includes the Salesforce logo, a search bar labeled "Search Setup", and various navigation icons.
- Left Navigation Bar:** Shows "Setup" as the active tab, followed by "Home" and "Object Manager". A search bar contains the text "tabs". Below it are sections for "User Interface" (with "Rename Tabs and Labels" and "Tabs" selected), "Customize Home", "Customize Pages", and "Customize Fields & Forms".
- Page Content:** The main area is titled "Tabs" under the "SETUP" header. It includes:
 - Custom Tabs:** A section with a note: "You can create new custom tabs to extend Salesforce functionality or to build new application functionality." It lists existing tabs: Book1 (Box style), CDepartments (Lightning style), colleges (Jewel style), Research Proposal (Square style), and student (Box style). Each entry has "Edit | Del" links.
 - Web Tabs:** A section stating "No Web Tabs have been defined".
 - Visualforce Tabs:** A section stating "No Visualforce Tabs have been defined".
 - Lightning Component Tabs:** A section stating "No Lightning component tabs have been defined".
 - Lightning Page Tabs:** A section stating "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 add just field-level security, validation rules, and page layouts as needed to ensure that your custom objects and fields are appropriately configured for your organization's requirements.

MECW

My college colleges CDepartments student Content

Search...

New Contact Edit New Opportunity

Related Details

college Name: mecw

Total count: 2

phone: 9087116402

Email: kiot@gmail.com

Location: 90, 80

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

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

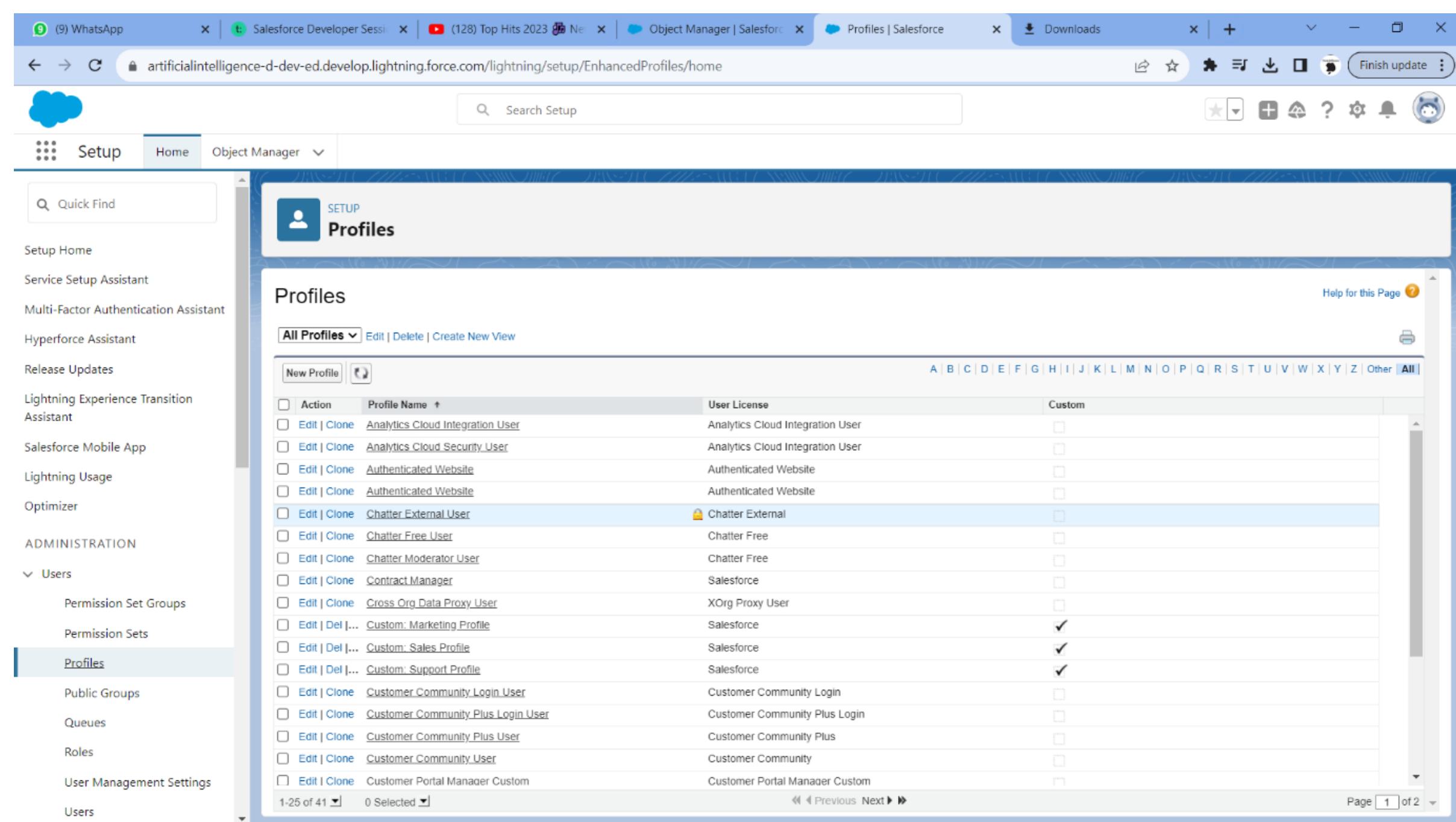
History

This screenshot shows a CRM application interface for managing educational institutions. The main title is 'MECW'. The top navigation bar includes links for 'My college', 'colleges', 'CDepartments', 'student', and 'Content'. A search bar is located at the top right. Below the header, there's a toolbar with icons for star, plus, document, question mark, settings, and notifications. The main content area displays a college record for 'mecw'. The 'Details' tab is selected. The record includes fields for college name ('mecw'), total count (2), phone number ('9087116402'), email ('kiot@gmail.com'), and location ('90, 80'). It also shows creation and modification history, both attributed to a user named 'krishna s.' on '01/10/2023, 11:16 am' and '01/10/2023, 11:19 am' respectively. A large blue sidebar on the right is partially visible.

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

Solution:

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



The screenshot shows the Salesforce Setup interface with the 'Profiles' page open. The left sidebar is collapsed, and the main area displays a list of profiles. The 'Chatter External' profile is selected, indicated by a blue background. The 'User License' column shows that 'Chatter External' has the 'Custom' license assigned. Other profiles listed include 'Analytics Cloud Integration User', 'Analytics Cloud Security User', 'Authenticated Website', 'Chatter Free User', 'Chatter Moderator User', 'Contract Manager', 'Cross Org Data Proxy User', 'Marketing Profile', 'Sales Profile', 'Support Profile', 'Customer Community Login User', 'Customer Community Plus Login User', 'Customer Community Plus User', 'Customer Community User', and 'Customer Portal Manager Custom'. The 'User License' column for most profiles shows 'Custom' or 'Salesforce' assigned, while 'Marketing Profile', 'Sales Profile', and 'Support Profile' have 'Salesforce' checked. The bottom of the page shows pagination information: '1-25 of 41' and '0 Selected'.

The screenshot shows two consecutive screenshots of the Salesforce Setup interface, specifically the Profiles section.

Screenshot 1: Profiles Page

The top screenshot displays the "Profiles" page under the "SETUP" tab. The left sidebar shows navigation options like Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, ADMINISTRATION, and Users. Under Users, "Profiles" is selected. The main content area shows a table of profiles:

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

Screenshot 2: Clone Profile Dialog

The bottom screenshot shows the "Clone Profile" dialog box. It prompts the user to "Enter the name of the new profile." A message at the top states: "You must select an existing profile to clone from." Below this, there are fields for "Existing Profile" (set to "Standard Platform User"), "User License" (set to "Salesforce Platform"), and "Profile Name" (an empty input field). At the bottom of the dialog are "Save" and "Cancel" buttons.

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	<input type="text" value="Manager"/>

Save **Cancel**

Help for this Page

Profiles

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](#) | [Enabled Apex Class Access](#) | [Enabled Visualforce Page Access](#) | [Enabled External Data Source Access](#) | [Enabled Named Credential Access](#) | [Enabled External Credential Principal Access](#) | [Enabled Custom Metadata Type Access](#) | [Enabled Custom Setting Definitions Access](#) | [Enabled Flow Access](#) | [Enabled Service Presence Status Access](#) | [Enabled Custom Permissions](#)

Profile Detail

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

Page Layouts

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

Setup Home Object Manager

Profiles

Manager

Set the permissions and page layouts for this profile.

Profile Edit

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

Custom App Settings

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

Service Provider Access

Tab Settings

Overwrite users' personal tab customizations

Home	Default On	Learning	Default On
Accounts	Default On	Libraries	Tab Hidden
Alert Settings	Default On	Lightning Bolt Solutions	

Communication Subscription Channel Types

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

Individuals

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

Custom Object Permissions

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

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

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

Salesforce Developer Session | lightning/setup/EnhancedProfiles/page?address=%2F00e5j00000WQBz%2Fe%3FretURL%3D%252F00e5j0... | Profiles | Salesforce | Downloads | + | - | X

Cloud icon | Search Setup | Home | Object Manager | Setup

Quick Find

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

SETUP Profiles

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

Custom Object Permissions

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

Session Settings

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

Password Policies

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

Salesforce Developer Session | lightning/setup/EnhancedProfiles/page?address=%2F00e5j00000WQBz%2Fe%3FretURL%3D%252F00e5j0... | Profiles | Salesforce | Downloads | + | - | X

Cloud icon | Search Setup | Home | Object Manager | Setup

Quick Find

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

SETUP Profiles

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

Custom Object Permissions

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

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Obscure secret answer for password resets:	<input type="checkbox"/>
Require a minimum 1 day password lifetime:	<input type="checkbox"/>
Don't immediately expire links in forgot password emails:	<input type="checkbox"/>

Setup Home Object Manager

Profiles

Custom Object Permissions

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

Session Settings

Session Times Out After: 2 hours of inactivity

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Password Policies

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

Users

All Users

This page allows you to create, view, and manage users.

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

View: All Users | Edit | Create New View

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit Login	Adanna_Diva	dadan	test_diva_pas_4w8bjybl5wiktszrgsblkpxp3gi@ofoyzwns.h43bkzw6mea@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	UMS User
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00d5j00000bcskkeab.lc0hfwmqjike@chatter.salesforce.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit Login	Ellington_Amelia	aelli	amelia.ellington.1_46kxcp9oodih.d6cwpdcuo4wh.bnbdwmvwhhg.wguctor1dalv@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/> Edit	S_GOPAL	GS	kio520@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	User_Integration	Integ	integration@00d5j00000bcskkeab.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightssecurity@00d5j00000bcskkeab.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Security User

Salesforce Developer Session | Object Manager | Salesforce | Users | Salesforce | Downloads

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005%2Fe%3FretURL%3D%252F005%253FisUserEntityOv...

Cloud icon

Setup Home Object Manager

Users

New User

User Edit

General Information

First Name	sowmiya
Last Name	bala
Alias	sbala
Email	2k20cse179@kiot.ac.in
Username	2k21it@kiot.ac.in
Nickname	User169616771282564526
Title	worker
Company	kiot bank
Department	
Division	

Role: <None Specified>

User License: Salesforce Integration

Profile: Salesforce API Only System Integrations

Active:

Marketing User:

Offline User:

Knowledge User:

Flow User:

Service Cloud User:

Site.com Contributor User:

Site.com Publisher User:

WDC User:

Data.com User Type: -None-

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

Accessibility Mode (Classic Only):

High-Contrast Palette on Charts:

Load Lightning Pages While Scrolling:

Debug Mode:

Help for this Page

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
Users
Data
Email
PLATFORM TOOLS
Apps
Feature Settings

Salesforce Developer Session | Object Manager | Salesforce | Users | Salesforce | Downloads

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005%2Fe%3FretURL%3D%252F005%253FisUserEntityOv...

Cloud icon

Setup Home Object Manager

Users

New User

User Edit

General Information

First Name	sowmiya
Last Name	bala
Alias	sbala
Email	2k20cse179@kiot.ac.in
Username	2k21it@kiot.ac.in
Nickname	User169616771282564526
Title	worker
Company	kiot bank
Department	
Division	

Role: <None Specified>

User License: Salesforce Platform

Profile: Manager

Active:

Marketing User:

Offline User:

Knowledge User:

Flow User:

Service Cloud User:

Site.com Contributor User:

Site.com Publisher User:

WDC User:

Data.com User Type: -None-

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

Accessibility Mode (Classic Only):

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Search Setup

Hyperforce Assistant
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Public Groups
Queues
Roles
User Management Settings
Users
Data
Email
PLATFORM TOOLS
Apps
Feature Settings

The screenshot shows a web browser with two tabs open:

- Salesforce Developer Session**: This tab displays the Salesforce Setup interface under the "Users" section. It shows the "User Detail" for a user named "sowmiya bala". The user's name is listed as "sowmiya bala", alias as "sbal", and email as "2k20cse179@kiot.ac.in". The "Role" section indicates "Salesforce Platform Profile Manager" with "Active" checked. Other roles listed include Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Mobile Push Registrations, Data.com User Type, Accessibility Mode (Classic Only), Debug Mode, High-Contrast Palette on Charts, Load Lightning Pages While Scrolling (checked), and Salesforce CRM Content User (checked).
- Gmail**: This tab shows the Gmail inbox. The sidebar includes options like Mail (99+), Chat, Spaces, Meet, Compose, and a list of messages: Inbox (5,318), Starred, Snoozed, Sent, Drafts (5), and More. The main area shows an incoming email from "support@salesforce.com" with the subject "Welcome to Salesforce!". The email body contains a "Verify Account" button, a URL (<https://artificialintelligence-d-dev-ed.develop.my.salesforce.com>), and the username "2k21it@kiot.ac.in". A message at the bottom says "Again, welcome to Salesforce!".

Change Your Password

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

- 8 characters
- 1 letter
- 1 number

* New Password
..... Good

* Confirm New Password
..... Match

Security Question
In what city were you born?

* Answer
salem

Change Password

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

Login | Salesforce

Username
2k21it@kiot.ac.in

Password
.....

Log In

Remember me

Forgot Your Password?

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

WATCH ON DEMAND

AIDay

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Recently Viewed | Bank | Salesfo

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

MECW

mebw Bank customers Home

Recently Viewed

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

Bank Name

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

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

DISPLAY DENSITY

✓ Comfy

Compact

OPTIONS

Switch to Salesforce Classic

Add Username

List View

New Bank | Salesforce

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

mebw Bank customers Home

Recently Viewed

0 items • Updated a few seconds ago

Bank Name

New Bank

Information

* = Required Information

Bank Name: boi

Owner: sowmiya bala

phoneno: 0897754534

New Change Owner

Cancel Save & New Save

List View

New customer | Salesforce

Recently Viewed

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

customer Name ↓

New customer

Information

*customer Name: madhu

*Bank: boi

Cancel Save & New Save

MECW

customer madhu

customer "madhu" was created.

Related Details

customer Name: madhu

Bank: boi

Created By: sowmiya bala, 01/10/2023, 7:17 pm

Last Modified By: sowmiya bala, 01/10/2023, 7:17 pm

New Contact Edit Delete

The screenshot shows two views of the Salesforce Setup interface. The top view displays the 'Profiles' page under the 'SETUP' tab, showing a list of existing profiles. The bottom view shows a 'Clone Profile' dialog.

Profiles Page (Top Screenshot):

- Left Sidebar:** Includes links for Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, ADMINISTRATION, and Users (with sub-links for Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, and User Management Settings).
- Central Content:** A table titled 'Profiles' with columns for Action, Profile Name, User License, and Status (Custom). The table lists several profiles, including 'Salesforce API Only System Integrations' (Salesforce Integration), 'salesmanager' (Salesforce, checked), 'Silver Partner User' (Silver Partner), 'Solution Manager' (Salesforce), 'Standard Platform User' (Salesforce Platform), 'Standard User' (Salesforce), and 'System Administrator' (Salesforce). A navigation bar at the bottom indicates 1 of 7 pages.

Clone Profile Dialog (Bottom Screenshot):

- Left Sidebar:** Same as the top screenshot.
- Central Content:** A dialog titled 'Clone Profile' with the instruction 'Enter the name of the new profile.' It contains a message 'You must select an existing profile to clone from.' and a table showing the 'Existing Profile' (Standard Platform User), 'User License' (Salesforce Platform), and 'Profile Name' (salesmanager). A note 'I = Required Information' is present. Buttons for 'Save' and 'Cancel' are at the bottom.

Salesforce Developer Session 2 | (128) Top Hits 2023 New Pop | Profiles | Salesforce | Welcome to Salesforce: Verify yo

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j00000WQCE%3Fsetupid%3DEnhancedPr...

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

Profile salesmanage

Help for this Page ?

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

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

- Header:** The top navigation bar includes tabs for WhatsApp, Salesforce Developer Session 2, Top Hits 2023, Profiles | Salesforce, and Welcome to Salesforce: Verify yo... The URL in the address bar is <https://artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j00000WQCE%2Fe%3FretURL%3D%252F0...>.
- Page Header:** The main header displays the word "SETUP" above "Profiles".
- Left Sidebar:** The sidebar under "Setup" contains links for Quick Find, Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, and Administration categories (Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and Users).
- Profile Edit Section:** The central area shows the "Profile Edit" screen for the "salesmanage" profile. The profile name is "salesmanage", the user license is "Salesforce Platform", and it is a "Custom Profile" (checked). The "Description" field is empty.
- Custom App Settings:** This section lists various apps with checkboxes for "Visible" and radio buttons for "Default".

App	Visible	Default
Analytics Studio (standard_Insights)	<input type="checkbox"/>	<input checked="" type="radio"/>
App Launcher (standard_AppLauncher)	<input type="checkbox"/>	<input checked="" type="radio"/>
kiot (kiot)	<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 checked="" type="radio"/>
- Service Provider Access:** This section contains a "Tab Settings" section with a checkbox for "Overwrite users' personal tab customizations".
- Standard Tab Settings:** This section includes tabs for "Home" (selected), "Default On", "Learning" (selected), and "Default Off".

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

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

Custom Object Permissions

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

Contact Point Emails User External Credentials

Enhancement Requests

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: -None-

Password Policies

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

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

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

Custom Object Permissions

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

Contact Point Emails User External Credentials

Enhancement Requests

Session Settings

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

Save | Save & New | Cancel

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

Setup Home Object Manager

Search Setup

Cloud icon

User icon

SETUP Users

New User

User Edit

General Information

First Name:

Last Name:

Alias:

Email:

Username:

Nickname:

Title:

Company:

Department:

Division:

Role: <None Specified>

User License: Salesforce Integration

Profile: Salesforce API Only System Integrations

Active:

Marketing User:

Offline User:

Knowledge User:

Flow User:

Service Cloud User:

Site.com Contributor User:

Site.com Publisher User:

WDC User:

Data.com User Type: -None-

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

Accessibility Mode (Classic Only):

High-Contrast Palette on Charts:

Load Lightning Pages While Scrolling:

Debug Mode:

Help for this Page

Required Information: (*)

Feature Settings

Data.com

Prospector Users

Service

Embedded Service

Messaging for In-App and Web User Verification

User Interface

Action Link Templates

Actions & Recommendations

App Menu

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

Setup Home Object Manager

Search Setup

Cloud icon

User icon

SETUP Users

New User

User Edit

General Information

First Name: madhu

Last Name: b

Alias: mb

Email: 2k20cse179@kiot.ac.in

Username: 2k20cse179@kiot.ac.in

Nickname: User169616842428654192

Title: worker

Company: kiot bank

Department: Sales

Division:

Role: <None Specified>

User License: Salesforce Platform

Profile: salesmanage

Active:

Marketing User:

Offline User:

Knowledge User:

Flow User:

Service Cloud User:

Site.com Contributor User:

Site.com Publisher User:

WDC User:

Data.com User Type: -None-

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

Accessibility Mode (Classic Only):

High-Contrast Palette on Charts:

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Help for this Page

Required Information: (*)

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

The screenshot shows the Salesforce Setup interface with the 'Users' configuration page open. The left sidebar navigation includes 'Setup', 'Home', 'Object Manager', and a search bar. Under 'User Management Settings', the 'Users' section is selected. The main content area displays the 'Users' configuration page with the following fields:

- Mailing Address**: Fields for Street, City, Zip/Postal Code, State/Province, and Country.
- Single Sign On Information**: Field for Federation ID.
- Locale Settings**: Fields for Time Zone (GMT+05:30 India Standard Time (Asia/Kolkata)), Locale (English (India)), and Language (English).
- Approver Settings**: Fields for Delegated Approver, Manager, and Receive Approval Request Emails (set to "Only if I am an approver"). A checkbox for "Generate new password and notify user immediately" is checked.

At the bottom are 'Save', 'Save & New', and 'Cancel' buttons.

Screenshot of a web browser showing two tabs side-by-side. The top tab is a Salesforce Setup page titled 'Users' for a user named 'madhu b'. The bottom tab is a Gmail inbox page.

Salesforce Setup - Users Tab:

- User Detail:**
 - Name: madhu b
 - Alias: mb
 - Email: 2k20cse179@kiot.ac.in [Verify]
 - Username: 2k20csit@kiot.ac.in
 - Nickname: User16961684242865419206
 - Title: worker
 - Company: kiot bank
 - Department: Sales
 - Division: 4/194 ,anyampalayam, uthamasolapuram , Paralkkodu , salem- 636308 SALEM 636308 TAMIL NADU
 - Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata)
 - Locale: English (India)
 - Language: English
 - Delegated Approver:
 - Manager:
 - Receive Approval Request Emails: Only if I am an approver
 - Federation ID:
 - App Registration: One-Time Password Authenticator
- Role:**
 - Salesforce Platform Profile: salesmanage
 - Active: checked
 - Marketing User
 - Offline User
 - Knowledge User
 - Flow User
 - Service Cloud User
 - Site.com Contributor User
 - Site.com Publisher User
 - WDC User
 - Mobile Push Registrations: View
 - Data.com User Type:
 - Accessibility Mode (Classic Only)
 - Debug Mode
 - High-Contrast Palette on Charts
 - Load Lightning Pages While Scrolling: checked
 - Salesforce COM Content User

Gmail Inbox Tab:

- Inbox:** 5,318 messages
- Compose:** button
- Labels:** +
- Welcome to Salesforce!** message:
 - Click below to verify your account.
 - Verify Account** button
 - To easily log in later, save this URL:
<https://artificialintelligence-d-dev-ed.develop.my.salesforce.com>
 - Username: 2k20csit@kiot.ac.in
 - Again, welcome to Salesforce!
- Footer:**
 - © 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
- Actions:** Reply, Forward

Change Your Password | Salesforce

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

salesforce

Change Your Password

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

- 8 characters
- 1 letter
- 1 number

* New Password
..... Good

* Confirm New Password
..... Match

Security Question
In what city were you born?

* Answer
india

Change Password

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

Recently Viewed | Bank | Salesfo... +

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

MECW

mecw Bank customers Home

Search...

Bank Recently Viewed New

0 items • Updated a few seconds ago

Bank Name

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

List View

Recently Viewed | customers | S | +

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

MECW

mecw Bank customers Home

customers Recently Viewed

0 items • Updated a few seconds ago

customer Name

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

List View

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

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

Setup Home Object Manager

user

Users

Permission Set Groups

Permission Sets

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

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

All Permission Sets | Edit | Delete | Create New View

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

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

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

Step 2:

Permission Sets:

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

Object-Level Security:

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

Record-Level Security:

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

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.

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

The page title is "Permission Sets".

The left sidebar shows the navigation path: Setup > Users > Permission Sets.

The main content area displays a table of permission sets:

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

Page 1 of 2

The screenshot shows the 'Permission Sets' creation page in the Salesforce Setup interface. The left sidebar is collapsed, and the main area displays the 'Enter permission set information' section. The 'Label' field contains 'salesmanager', and the 'API Name' field also contains 'salesmanager'. Both fields have a red border, indicating they are required fields. The 'Description' field is empty. The 'Session Activation Required' checkbox is unchecked. Below this, the 'Select the type of users who will use this permission set' section is visible, containing instructions and a dropdown menu for selecting a license, which is currently set to '-None-'.

Enter permission set information

Label: salesmanager

API Name: salesmanager

Description:

Session Activation Required:

Select the type of users who will use this permission set

Who will use this permission set?

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

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

License: --None--

Save Cancel

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

Permission Sets

salesmanager

Permission Set Overview

Description	API Name	salesmanager
License	Namespace Prefix	
Session Activation Required	Created By	GOPAL S, 01/10/2023, 7:29 pm
Last Modified By		

Apps

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

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

Permission Sets

salesmanager

Permission Set Overview > Object Settings

Object Settings

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

Screenshot of the Salesforce Permission Sets page showing the configuration of the "salesmanager" permission set for the "Bank" object.

The "Object Permissions" section shows the following settings:

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

The "Field Permissions" section shows the following settings:

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

Buttons at the bottom right of the main panel include "Save" and "Cancel".

Salesforce Developer Session | Lightning | Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce: Version 42.0 | Reset Password | Salesforce

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/OP55j000008Phok/PermissionSetAssignment/home

Setup Home Object Manager

Search Setup

... > SETUP > PERMISSION SET 'SALESMANAGER'

salesmanager

Current Assignments

No assignments defined.

Illustration: A blue cactus in a desert landscape with clouds and a sun.

Add Assignment

Setup Home Object Manager

Search Setup

... > SETUP > PERMISSION SET 'SALESMANAGER'

salesmanager

Select Users to Assign

All Users

1 item selected

Full Name	Username	Role	Profile
Amelia Ellington	aelli	Force.com - App Subscription User	
Chatter Expert	Chatty	Chatter Free User	
Diya Adanna	dadan	UMS User	
GOPAL S	GS	System Administrator	
Integration User	integ	Analytics Cloud Integration User	
madhu b	mb	salesmanage	
Security User	sec	Analytics Cloud Security User	
sowmiya bala	sbala	Manager	

Cancel Next

Salesforce Setup interface showing the assignment of a permission set to a user.

The top window shows the "Select an Expiration Option For Assigned Users" screen. The "No expiration date" option is selected. A table lists the selected user "madhu b" with details: Role "salesmanager", Profile "salesmanager", User License "Salesforce Platform", and Expires On "Never Expires".

The bottom window shows the "Assignment Summary" screen after the assignment was completed. It displays the successful assignment of the "SALESMANAGER" permission set to "madhu b". The status is marked as "Success".

Recently Viewed | customers | S | +

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

MECW

mecw Bank customers Home

Search...

Recently Viewed

customers

0 items • Updated a few seconds ago

customer Name

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

LIST VIEW CONTROLS

New

Clone

Rename

Sharing Settings

Show List Filters

Select Fields to Display

Delete

Reset Column Widths

javascript:void(0)

The screenshot shows a browser window with a Salesforce Lightning interface. The title bar says 'Recently Viewed | customers | S | +' and the URL is 'artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/o/customer_c/list?filterName=Recent'. The page header includes 'MECW', 'mecw', 'Bank', 'customers', and 'Home' buttons, along with a search bar. The main content area is titled 'Recently Viewed' with a lightning bolt icon. It displays a single column for 'customer Name'. A message at the bottom says 'You haven't viewed any customers recently.' followed by 'Try switching list views.'. On the right, a context menu titled 'LIST VIEW CONTROLS' is open, listing options: 'New' (which is highlighted in orange), 'Clone', 'Rename', 'Sharing Settings', 'Show List Filters', 'Select Fields to Display', 'Delete', and 'Reset Column Widths'. At the bottom left of the page is a small button with the text 'javascript:void(0)'. The overall theme is blue and white, typical of the Salesforce branding.

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

Solution:

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

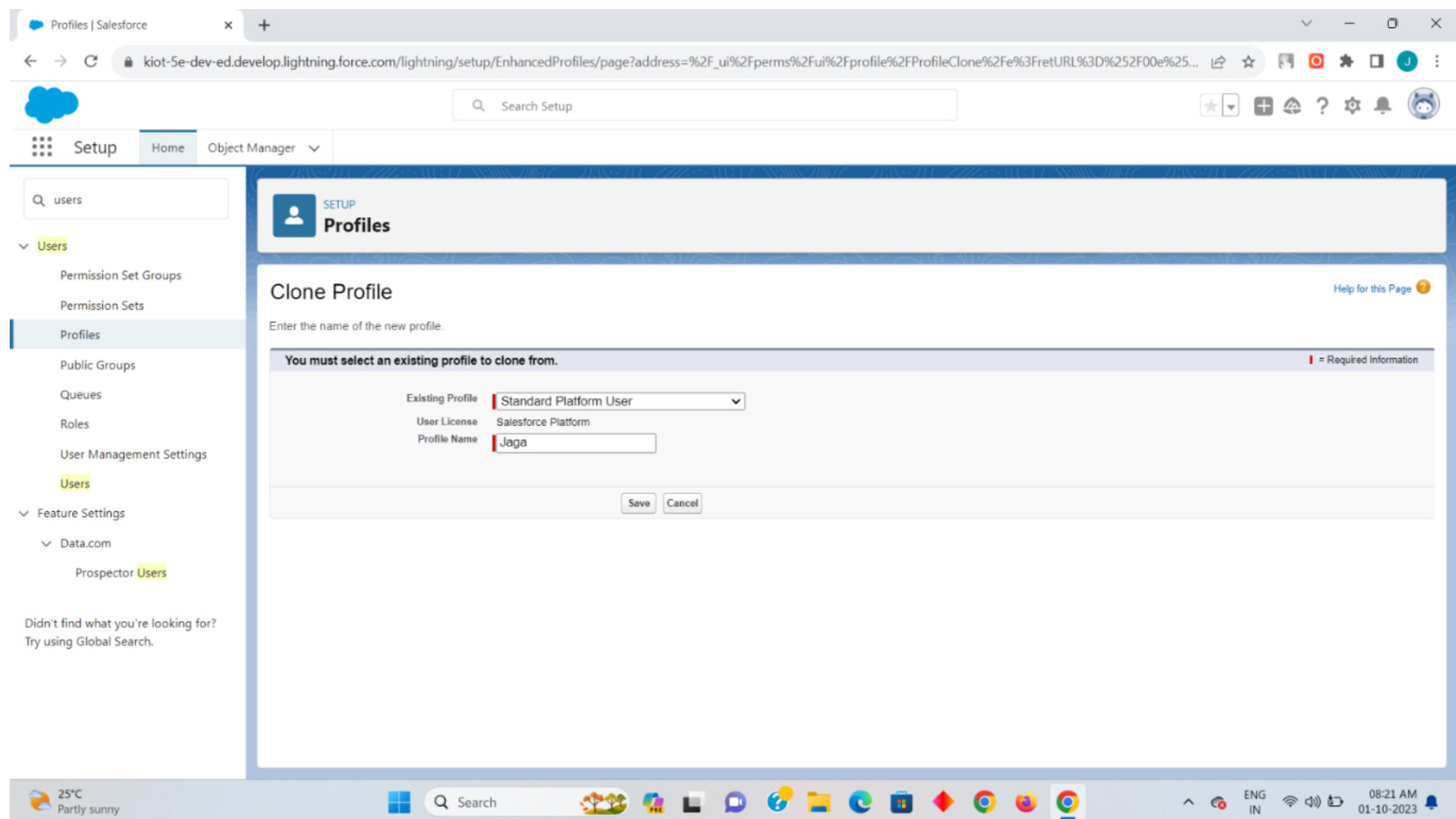
Setup-quick search[profile]

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

- Page Header:** Profiles | Salesforce
- URL:** kiot-5e-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e%3FisDeleteRedirect%3Dtrue%26setupid%3DEnhancedProfiles
- Setup Tab:** Home Object Manager
- Search Bar:** Search Setup
- Left Sidebar:** Users (selected), including sub-options: Permission Set Groups, Permission Sets, Profiles (selected), Public Groups, Queues, Roles, User Management Settings, and Prospector Users.
- Content Area:** **Profiles** page with a table listing profiles. The table has columns: Action, Profile Name, User License, and Custom. The table lists various profiles like Analytics Cloud Integration User, Authenticated Website, Chatter External User, etc.
- Table Headers:** All Profiles, Edit | Delete, Create New View, and a navigation bar A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All | Page 1 of 2.
- Bottom Navigation:** Weather (25°C Partly sunny), Search, and various system icons.
- System Status:** ENG IN, 08:20 AM, 01-10-2023.

Step 2:

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



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

Step 3:

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

The screenshot shows the Salesforce Setup interface for managing profiles. On the left, a sidebar navigation includes 'Users' (selected), 'Permission Set Groups', 'Permission Sets', 'Profiles' (selected), 'Public Groups', 'Queues', 'Roles', 'User Management Settings', 'Users', 'Feature Settings', and 'Data.com'. A note at the bottom says 'Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'Profile Jaga'. It displays 'Profile Detail' with fields for Name (Jaga), User License (Salesforce Platform), Description, Created By (Jagadesh_S), Modified By (Jagadesh_S), and a 'Custom Profile' checkbox. Below this is the 'Page Layouts' section, which lists standard object layouts for various objects like Account, Contact, and Lead. The operating hours section shows 'Operating Hours' and 'Order Product' layouts. At the bottom right, there are buttons for 'Edit', 'Clone', 'Delete', and 'View Users'.

This screenshot continues from the previous one, showing the 'Profiles' section of the Salesforce Setup. The sidebar remains the same. The main content area now includes the 'Communication Subscription Channel Types' and 'Custom Object Permissions' sections. Under 'Communication Subscription Channel Types', there are checkboxes for various categories like 'Communication Subscription Consents' and 'Communication Subscription Timings'. Under 'Custom Object Permissions', there are two tables for 'Basic Access' and 'Data Administration' for 'Providers' and 'Resources'. At the bottom, the 'Session Settings' section includes fields for 'Session Times Out After' (set to '2 hours of inactivity'), 'Session Security Level Required at Login' (set to 'None'), and several checkboxes for login policies such as 'Separate Experience Cloud site and Salesforce login authentication for employees', 'Relax login IP restrictions', and 'Skip employee device activation during Experience Cloud site login'.

Profiles | Salesforce

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

Setup Home Object Manager

Search Setup

Cloud icon

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

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

25°C Partly sunny

Search bar

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: -None-

Custom Object Permissions

Communication Subscription Channel Types, Communication Subscription Consents, Communication Subscription Timings, Contacts, Contact Point Addresses, Contact Point Consents, Contact Point Emails, Locations, Party Consents, Push Topics, Sellers, Streaming Channels, User External Credentials

Basic Access, Data Administration

Providers, Resources

Session Settings

Profile Edit: Jaga

Name: Jaga, User License: Salesforce Platform, Custom Profile: checked

Custom App Settings

Analytics Studio (standard_Insights), App Launcher (standard_AppLauncher), Hive App (Hive_App)

Platform (standard_Platform), WDC (standard_Work)

Service Provider Access

Tab Settings

Overwrite users' personal tab customizations

Cloud icon

Search bar

ENG IN 08:21 AM 01-10-2023

Profiles | Salesforce

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

Setup Home Object Manager

Search Setup

Cloud icon

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

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

25°C Partly sunny

Profile Edit: Jaga

Name: Jaga, User License: Salesforce Platform, Custom Profile: checked

Custom App Settings

Analytics Studio (standard_Insights), App Launcher (standard_AppLauncher), Hive App (Hive_App)

Platform (standard_Platform), WDC (standard_Work)

Service Provider Access

Tab Settings

Overwrite users' personal tab customizations

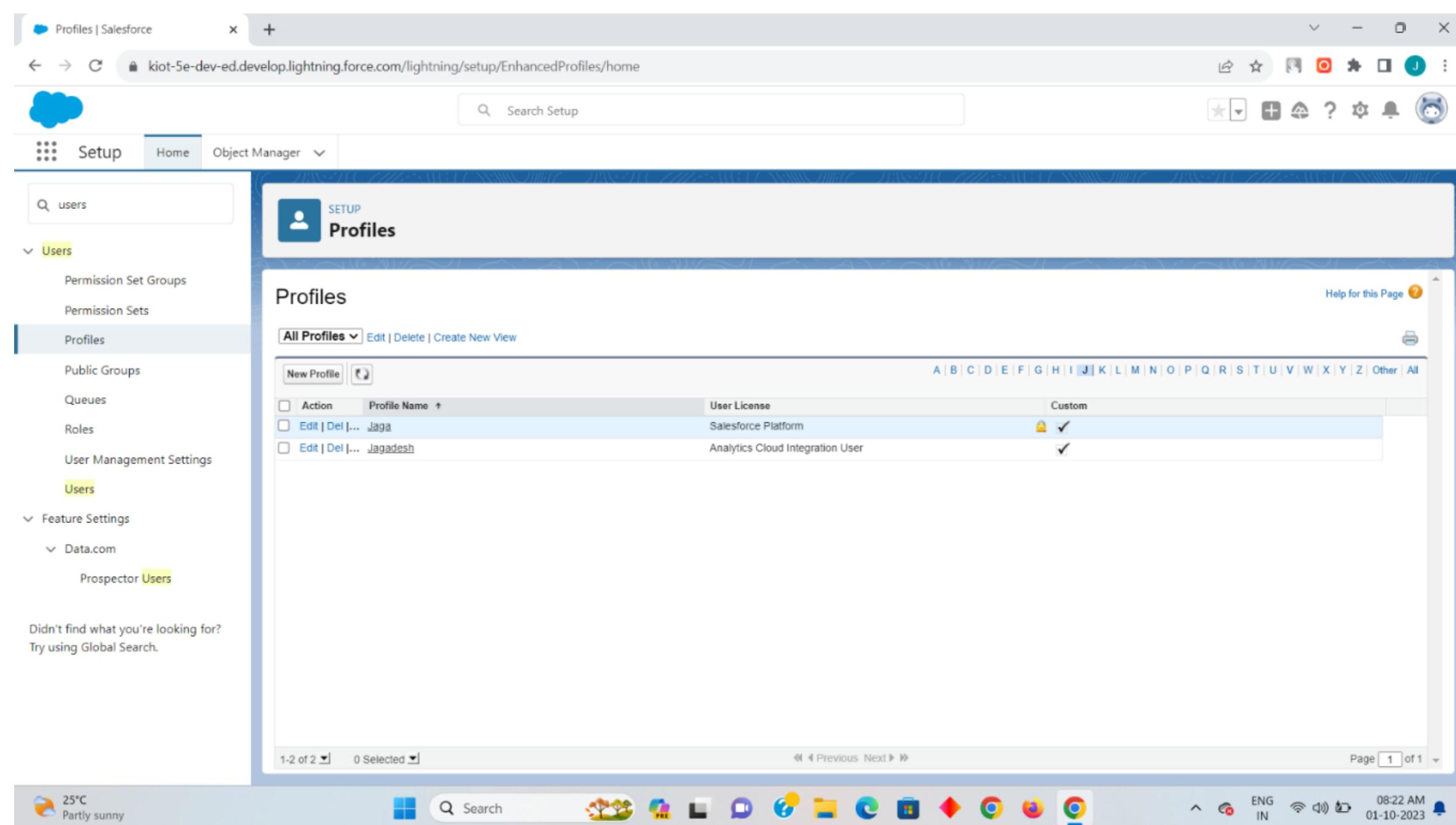
Cloud icon

Search bar

ENG IN 08:21 AM 01-10-2023

Step 4

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



The screenshot shows the Salesforce Setup interface for managing Profiles. The left sidebar is collapsed, and the main content area is titled 'Profiles'. A sub-header 'All Profiles' is visible, along with 'Edit | Delete | Create New View' buttons. The table lists two profiles:

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

At the bottom of the page, there are navigation links for '1-2 of 2' and '0 Selected', along with a 'Page 1 of 1' indicator. The status bar at the bottom of the browser window shows the date and time as '01-10-2023 08:22 AM'.

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 Taga 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 username can be created with alternate name but with the same user profile and once the two user are created click on save.

Users | Salesforce x

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

Setup Home Object Manager

Search Setup

Cloud icon

Users

All Users

Help for this Page

View: All Users Edit Create New View

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

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Chatter Expert	Chatter	chatty_00d5j00000c8jpscaf_6z9bkrrkd4@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	Grey_Jane	jgrey	jane_gray.fygnimmoaim.cz7d2kiogtn3@gmail.com		<input checked="" type="checkbox"/>	Customer Community User
<input type="checkbox"/>	S_Jaga	JS	jaga098@gmail.com	CEO	<input type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	S_Jagadesh	JS	wow@gmail.com	SF Admin	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	S_Jagadesh	JS	jaga1117@gmail.com	Channel Sales Team	<input type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	User_Integration	integ	integration@00d5j00000c8jpscaf.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	User_Security	sec	insightssecurity@00d5j00000c8jpscaf.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

New User Reset Password(s) Add Multiple Users

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

25°C Partly sunny

Search

Cloud icon

ENG IN 08:22 AM 01-10-2023

Users | Salesforce x

kiot-5e-dev-ed.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005%2Fe%3FretURL%3D%252F005%253FisUserEntityOverride%253D1%2526retURL%...

Setup Home Object Manager

Search Setup

Cloud icon

Users

New User

Help for this Page

User Edit

General Information

First Name: Jagadesh11
Last Name: S
Alias: JS
Email: jww123@gmail.com
Username: jww123@gmail.com
Nickname: User169612875144962592
Title:
Company:
Department:
Division:

Role: Director, Channel Sales
User License: Salesforce Platform
Profile: --None--
Active: Jag Standard Platform User
Marketing User
Offline User
Knowledge User
Flow User
Service Cloud User
Site.com Contributor User
Site.com Publisher User
WDC User
Data.com User Type: --None--
Data.com Monthly Addition Limit: Default Limit (300)
Accessibility Mode (Classic Only):
High-Contrast Palette on Charts:

Save Save & New Cancel

25°C Partly sunny

Search

Cloud icon

ENG IN 08:23 AM 01-10-2023

Users | Salesforce x

kiot-5e-dev-ed.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005%2Fe%3FappLayout%3Dsetup%26retURL%3D%252F005%253FisUserEntityOverride%253D1%2526retURL%...

Setup Home Object Manager

Search Setup

Cloud icon

Users

New User

Help for this Page

User Edit

General Information

First Name: Jagadesh22
Last Name: S
Alias: JS
Email: jaa1@gmail.com
Username: jaa1@gmail.com
Nickname: User169612879983618745
Title:
Company:
Department:
Division:

Role: Marketing Team
User License: Salesforce Platform
Profile: --None--
Active: Jag Standard Platform User
Marketing User
Offline User
Knowledge User
Flow User
Service Cloud User
Site.com Contributor User
Site.com Publisher User
WDC User
Data.com User Type: --None--
Data.com Monthly Addition Limit: Default Limit (300)
Accessibility Mode (Classic Only):
High-Contrast Palette on Charts:

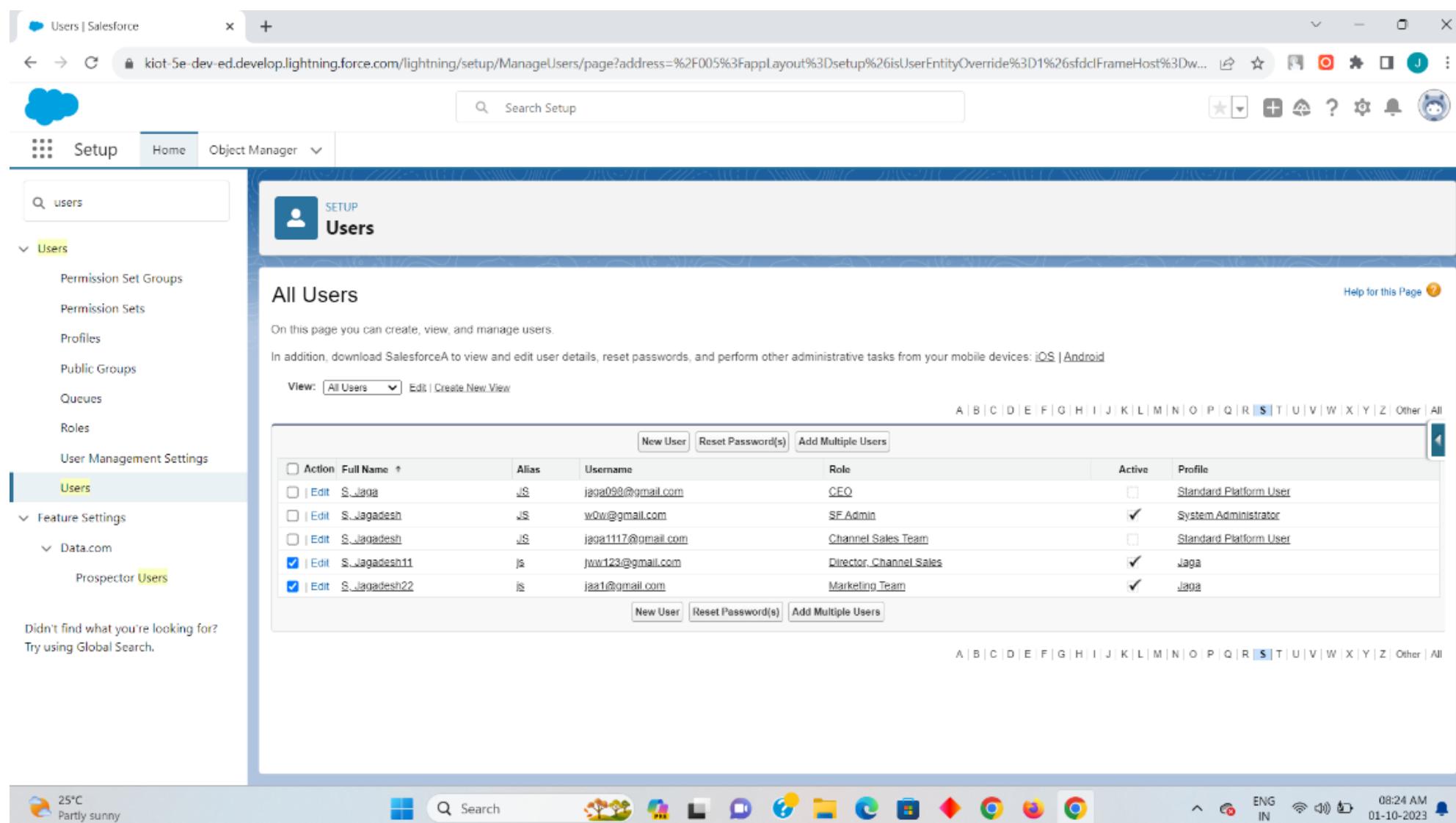
Save Save & New Cancel

25°C Partly sunny

Search

Cloud icon

ENG IN 08:23 AM 01-10-2023



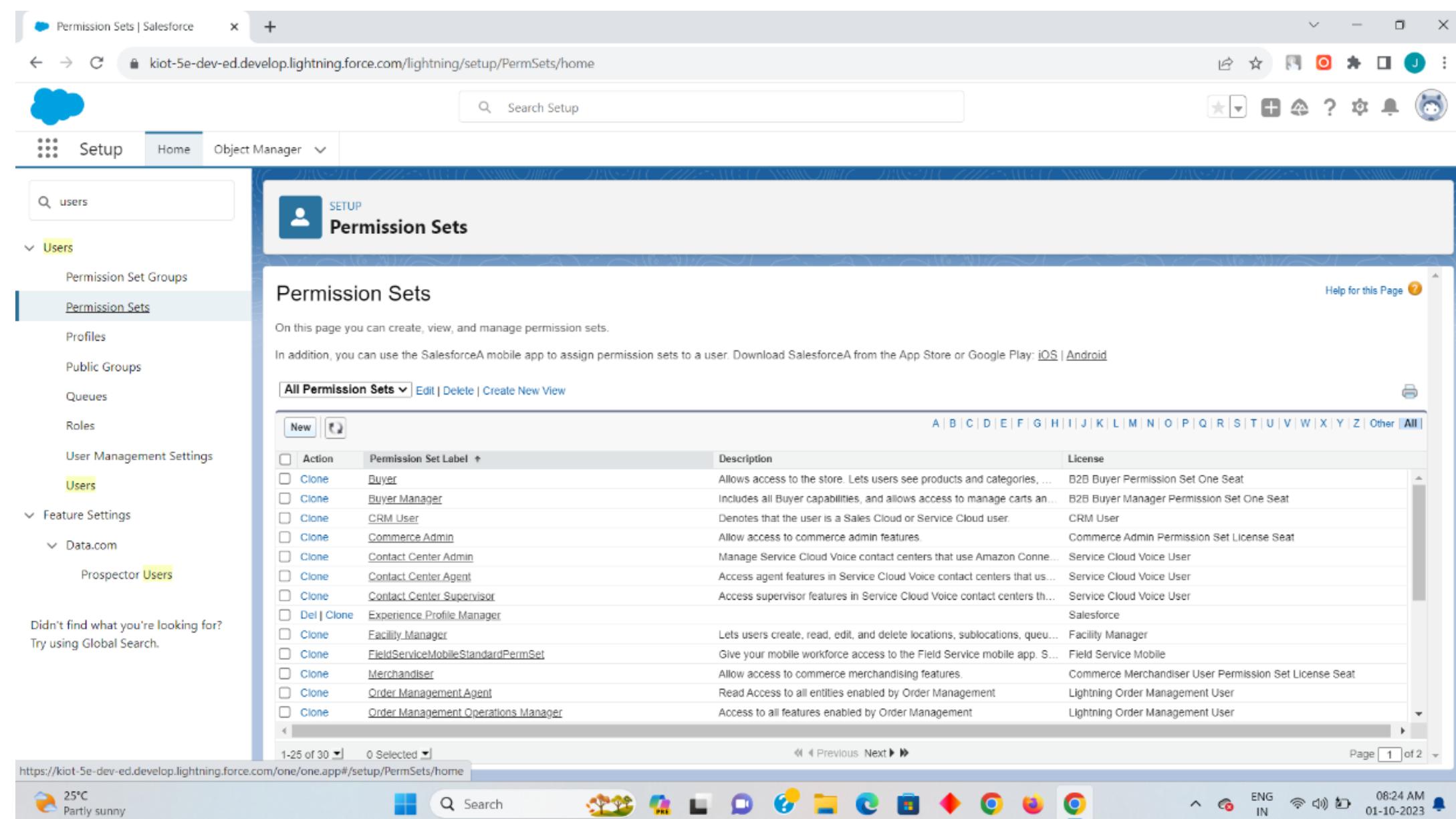
Now you can preview your two user that you have created in my side I had create the two users a Tagadesh11 and Tagadesh22 as a director channel sales with the marketing team.

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

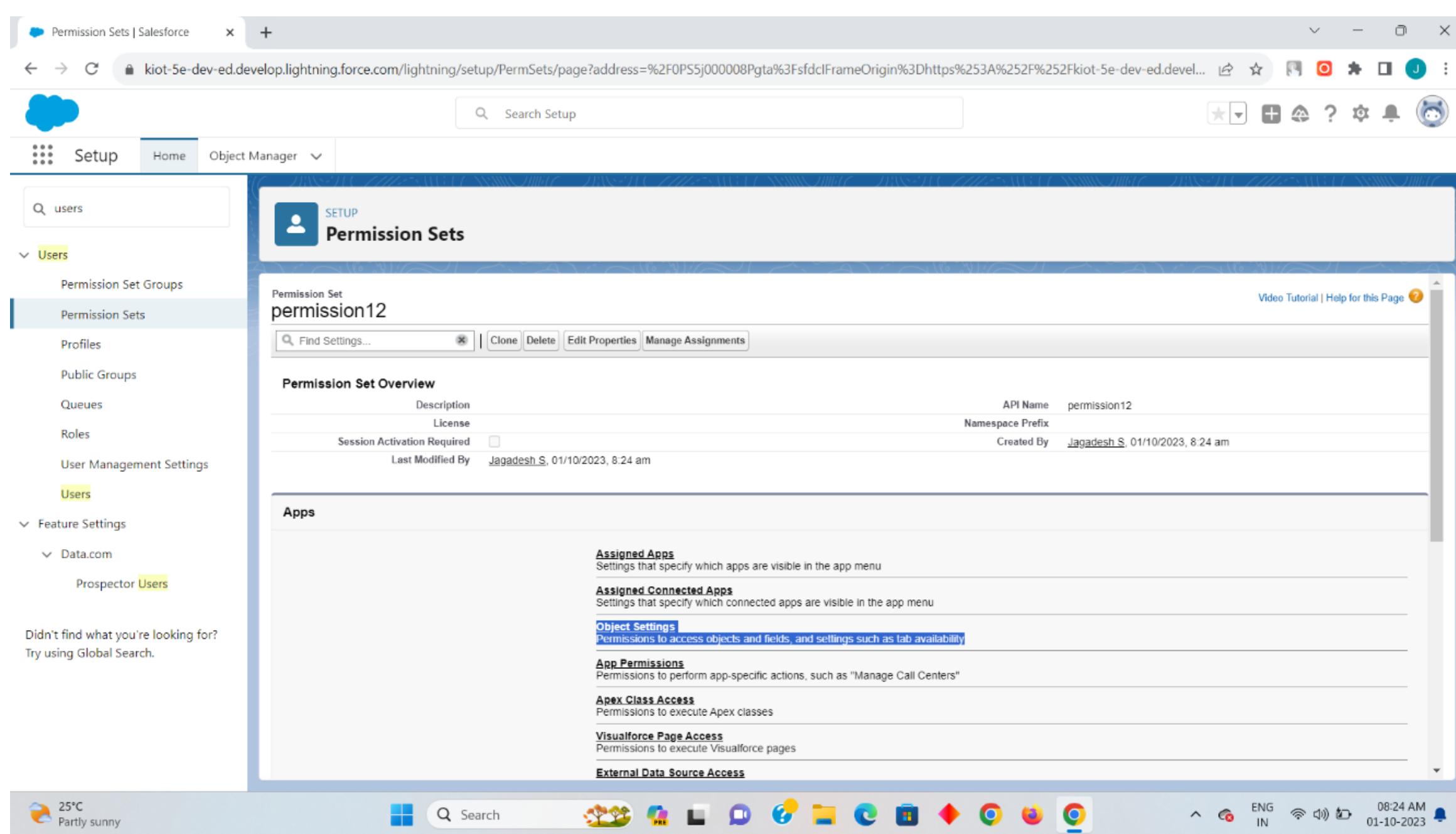
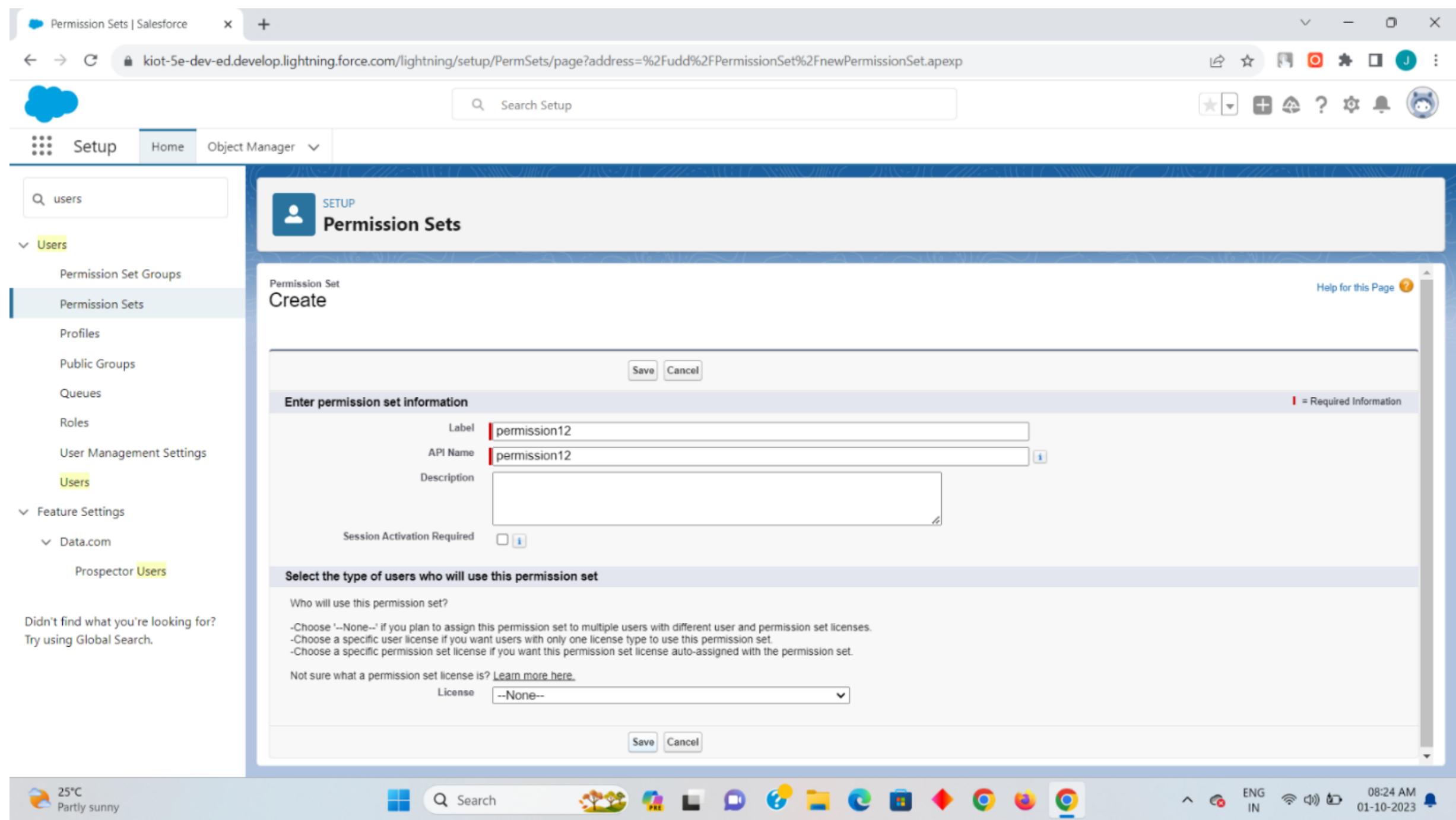
setup-quick search[permission set]-new-fill

label name [auto select the API name]-click on save-object settings-accounts.



The screenshot shows the Salesforce Setup interface for managing Permission Sets. The left sidebar is collapsed, and the main content area displays a list of permission sets. The list includes columns for Action, Permission Set Label, Description, and License. The 'Permission Sets' tab is selected in the top navigation bar.

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



The screenshot shows the Salesforce Setup interface under the 'Permission Sets' tab. A permission set named 'permission12' is selected. The 'Object Settings' section is displayed, listing various objects and their permissions. The table includes columns for Object Name, Object Permissions, Total Fields, and Tab Settings.

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

The screenshot shows the 'Object Permissions' section for the 'Accounts' object within the 'permission12' permission set. It lists permissions such as Read, Create, Edit, Delete, View All, and Modify All, each with a checkbox for enabling or disabling access.

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"/>

Step 7:

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

The screenshots show the Salesforce Setup interface for creating a new permission set. The permission set is named 'permission12'. In the 'Object Permissions' section under 'Accounts', the 'Delete' checkbox is initially unchecked. After the second screenshot, it is checked, indicating that the user has granted the 'Delete' permission for accounts to users assigned to this permission set.

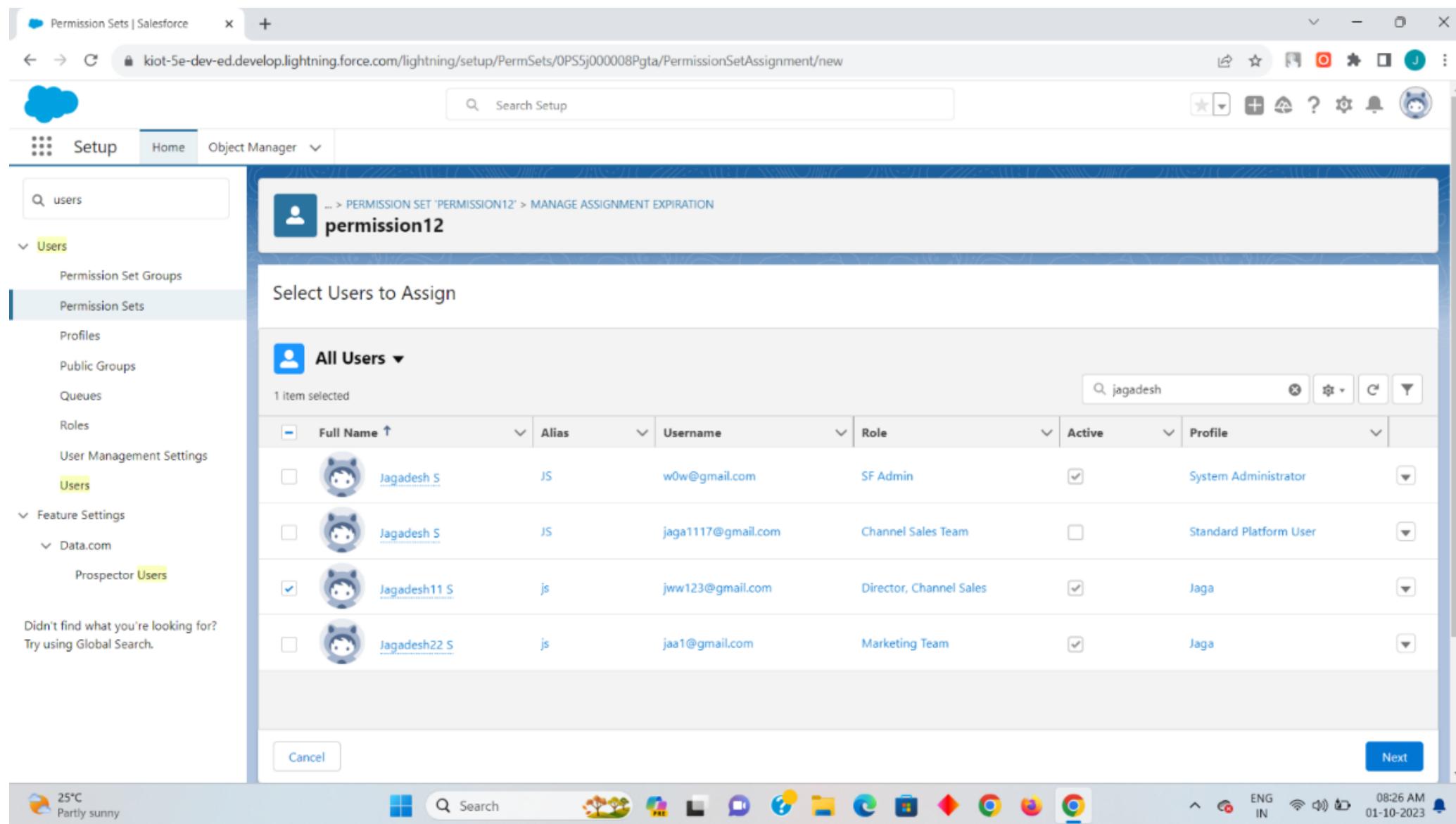
Step 8

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

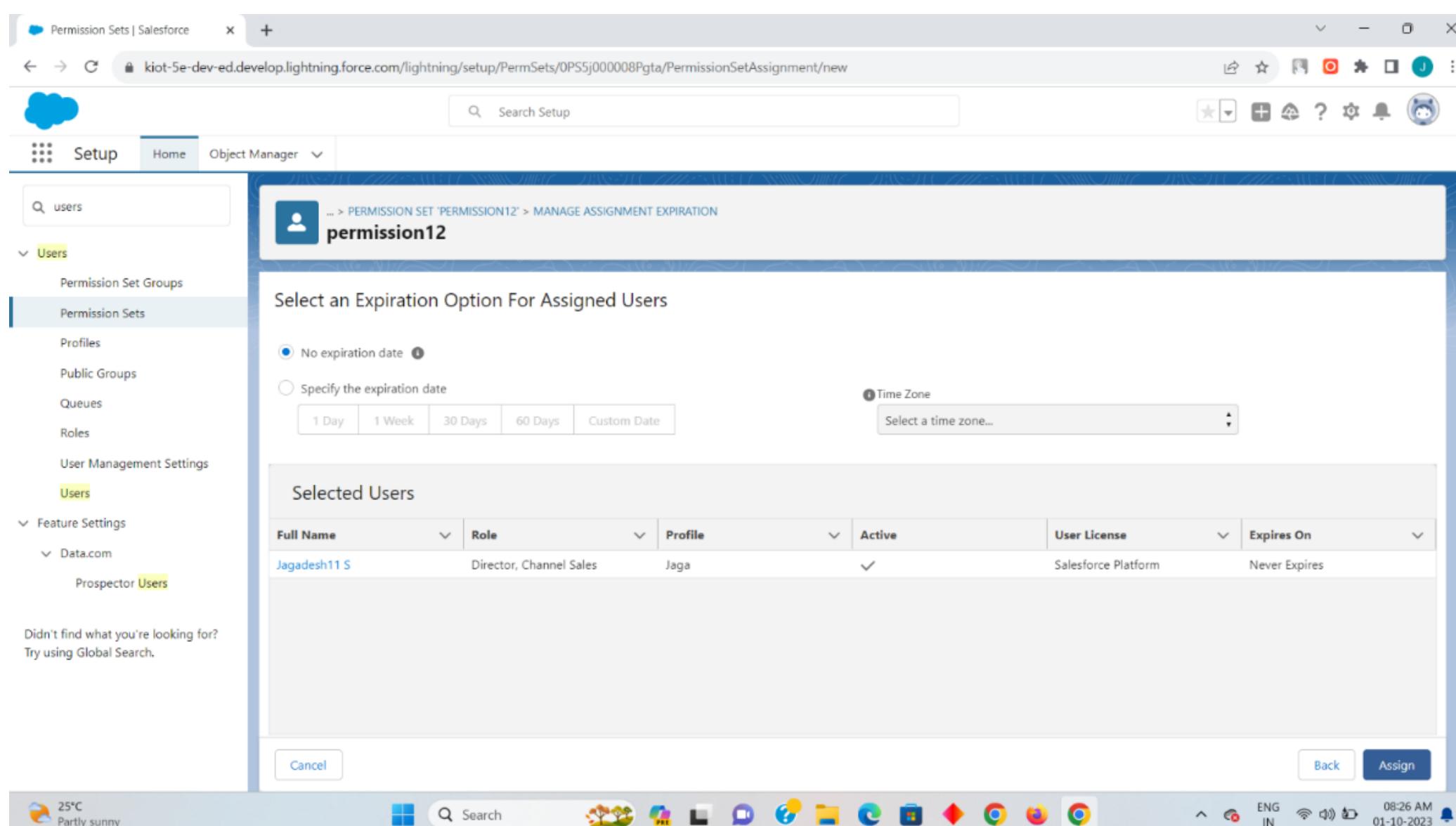
on assign so that the specific selected user can have a special access as delete on it.

This screenshot shows the 'Permission Sets | Salesforce' page in a web browser. The URL is kiot-5e-dev-ed.lightning.force.com/lightning/setup/PermSets/0PS5j000008Pgta/PermissionSetAssignment/home. The page title is 'permission12'. On the left, the navigation menu under 'Users' is expanded, showing 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', and 'Users'. The 'Users' item is selected. The main content area is titled 'Current Assignments' and displays a cactus and sun icon. A message says 'No assignments defined.' Below the message, there are edit, trash, and 'Add Assignment' buttons. The bottom of the screen shows a Windows taskbar with various icons and system status.

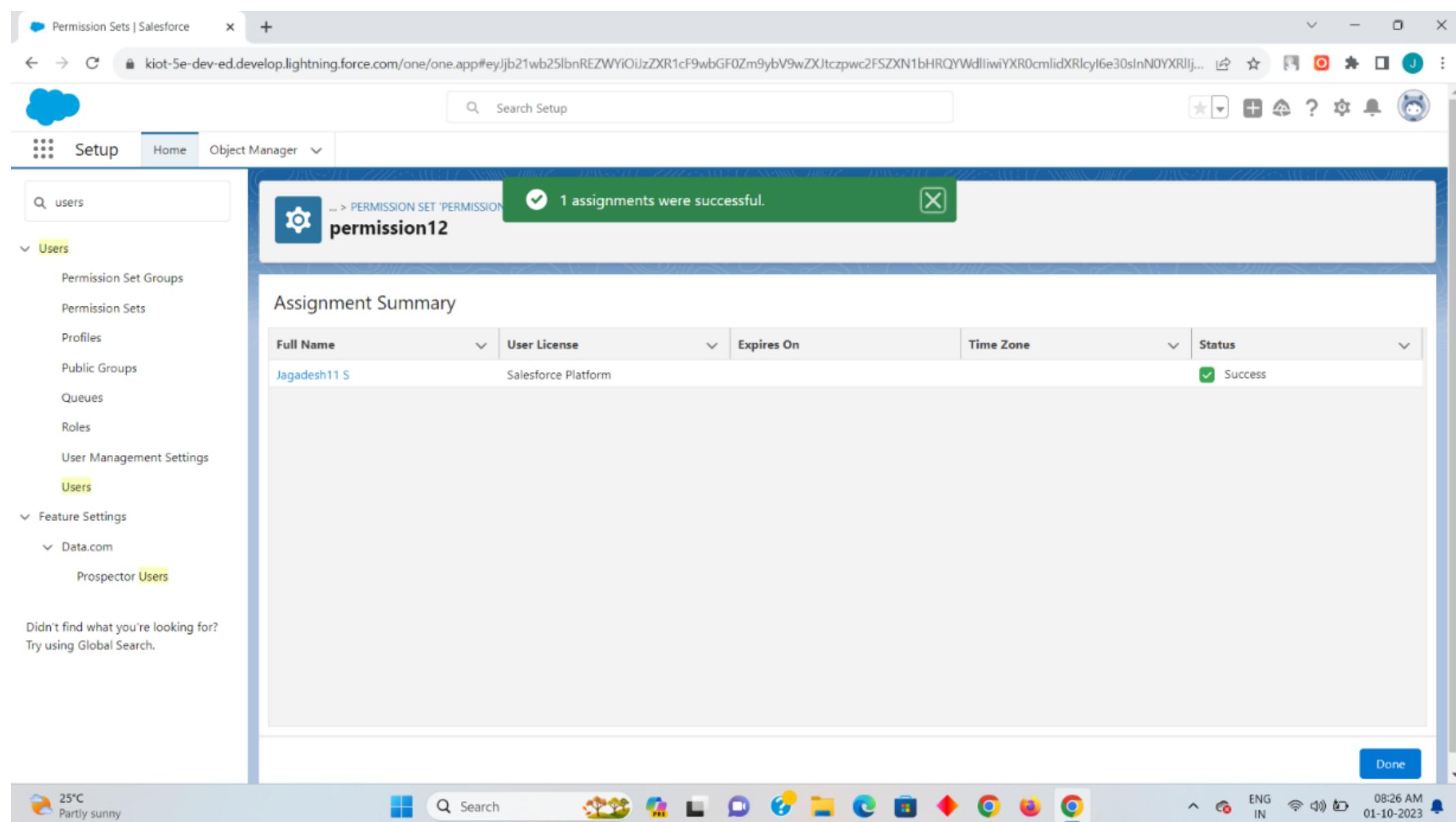
This screenshot shows the 'Manage Assignment Expiration' step in the 'PERMISSION SET 'PERMISSION12'' setup process. The URL is kiot-5e-dev-ed.lightning.force.com/lightning/setup/PermSets/0PS5j000008Pgta/PermissionSetAssignment/new. The page title is 'permission12'. The left sidebar is identical to the previous screenshot. The main content is titled 'Select Users to Assign' and shows a table of users. A search bar at the top right contains 'jagadesh'. A tooltip message says 'Role, Alias, and Profile aren't searchable. Use filters or sort on these fields instead.' The table columns are 'Full Name', 'Alias', 'Username', 'Role', and 'Action'. Four users are listed: Jagadesh S (SF Admin, checked), Jagadesh S (Channel Sales Team, unchecked), Jagadesh11 S (Director, Channel Sales, checked), and Jagadesh22 S (Marketing Team, checked). At the bottom are 'Cancel' and 'Next' buttons. The bottom of the screen shows a Windows taskbar.



Click on next.



Now click on Assign.



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

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

Solution:

Step 1: Create a Custom Object

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

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

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

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

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

Email Template
Thank You Email - Survey

Edit in Builder Edit Clone ▾

Details Related

Information

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

Message Content

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

Additional Information

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

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

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

Edit Email Alert
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		Save Save & New Cancel
Edit Email Alert ■ = Required Information		
Description	Survey - Thank You Email	
Unique Name	Survey_Thank_You_Email 	
Object	Survey Result	
Email Template	Thank You Email - Survey 	
Protected Component	<input type="checkbox"/>	
Recipient Type	Search: <input type="text" value="User"/>  for: <input type="text"/> 	
Recipients	Available Recipients User: Integration User User: Rakesh Gupta User: Security User <input type="button" value="Add"/>   <input type="button" value="Remove"/>	Selected Recipients Email Field: Email
You can enter up to five (5) email addresses to be notified. Additional Emails <input type="text"/> <input type="checkbox"/> Make this address the default From email address for this object's email alerts. 		
From Email Address	<input style="width: 150px;" type="text" value="Current User's email address"/>  <input type="checkbox"/> Make this address the default From email address for this object's email alerts. 	
<input type="button" value="Save"/> <input type="button" value="Save & New"/> <input type="button" value="Cancel"/>		

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

1. Click Setup.
2. In the Quick Find box, type Flows.
3. Select Flows then click on the New Flow.
4. Select the ScreenFlow 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
Save Response	Save_Response

Description

How Many Records to Create

- One
- Multiple

How to Set the Record Fields

- Use all values from a record
- Use separate resources, and literal values

Create a Record of This Object

* Object

Survey Result

Set Field Values for the Survey Result

Field	Value
Comment__c	A_a Comment
Email__c	A_a Email > Value
Name__c	{!Name.firstName} {!Name.lastName}
Rating__c	A_a Rating

+ Add Field

Manually assign variables

Cancel Done

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

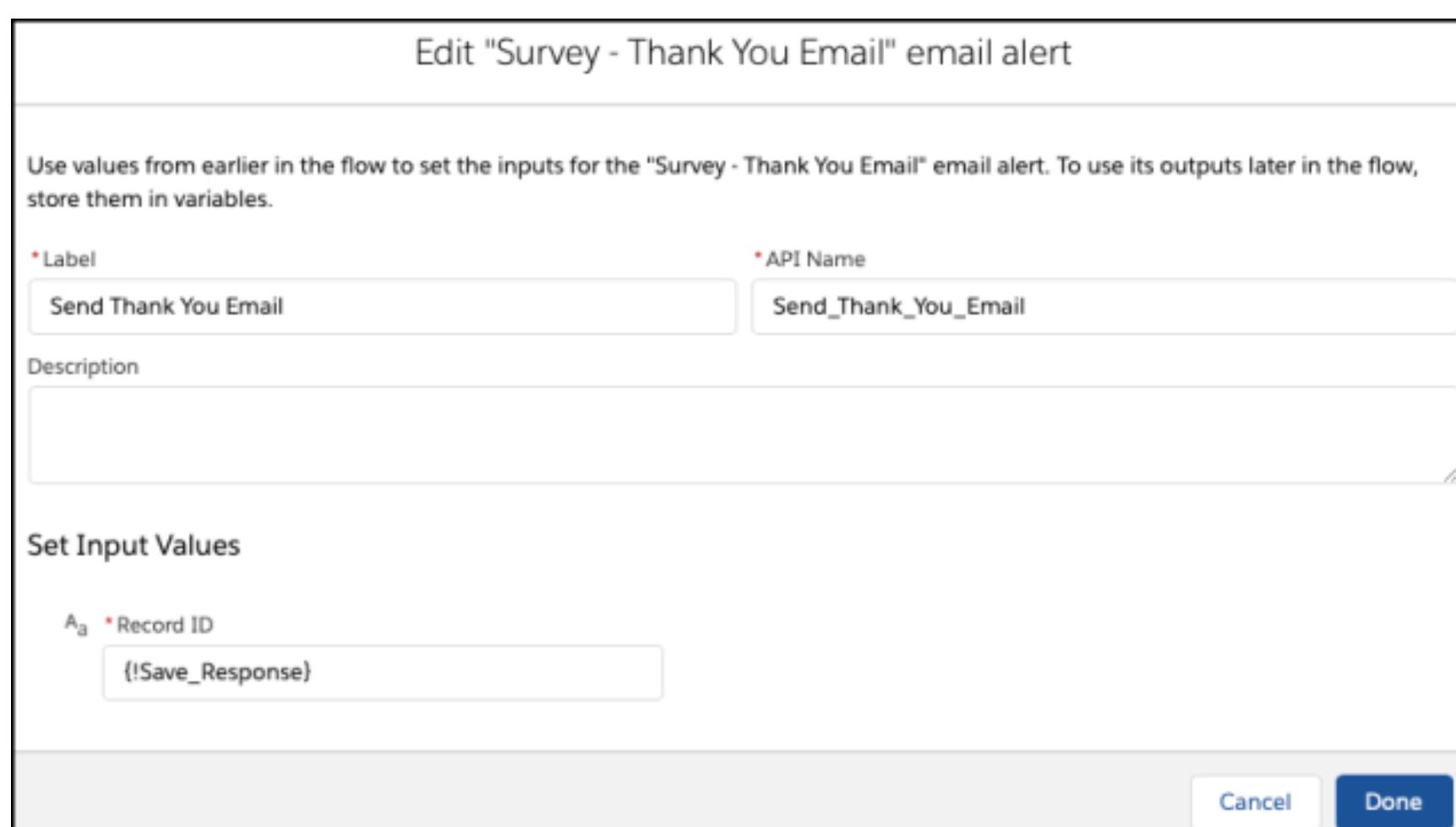
The next step is to call the Survey—Thank You Email email alert from flow so that when flow fires it triggers the thank you email to survey participants.

1. Under Toolbox, select Element.
2. Drag-and-drop Action element onto the Flow designer.

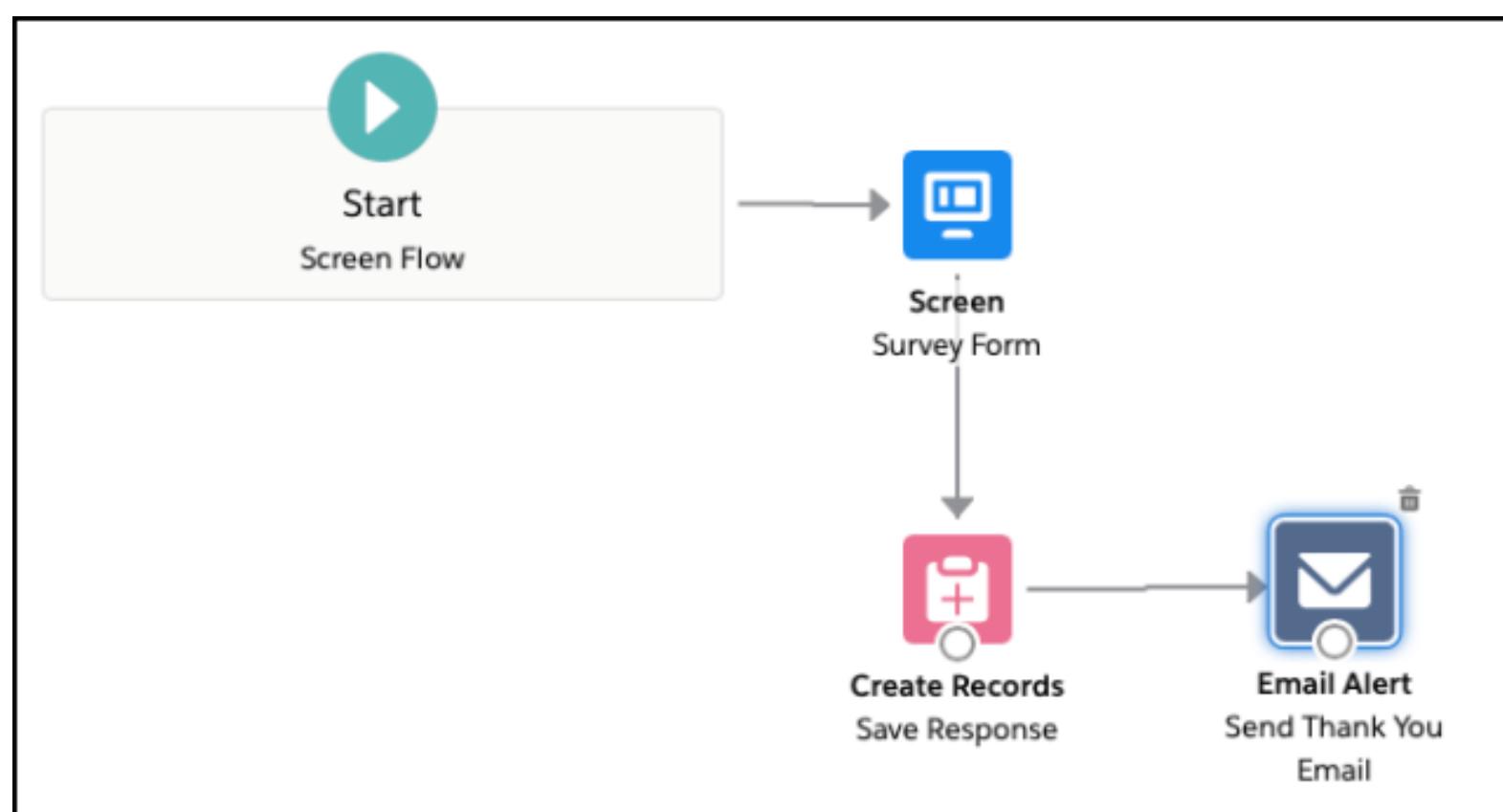
3. In the Action box, type Survey- Thank You Email.

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

5. Click Done.



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 ⓘ

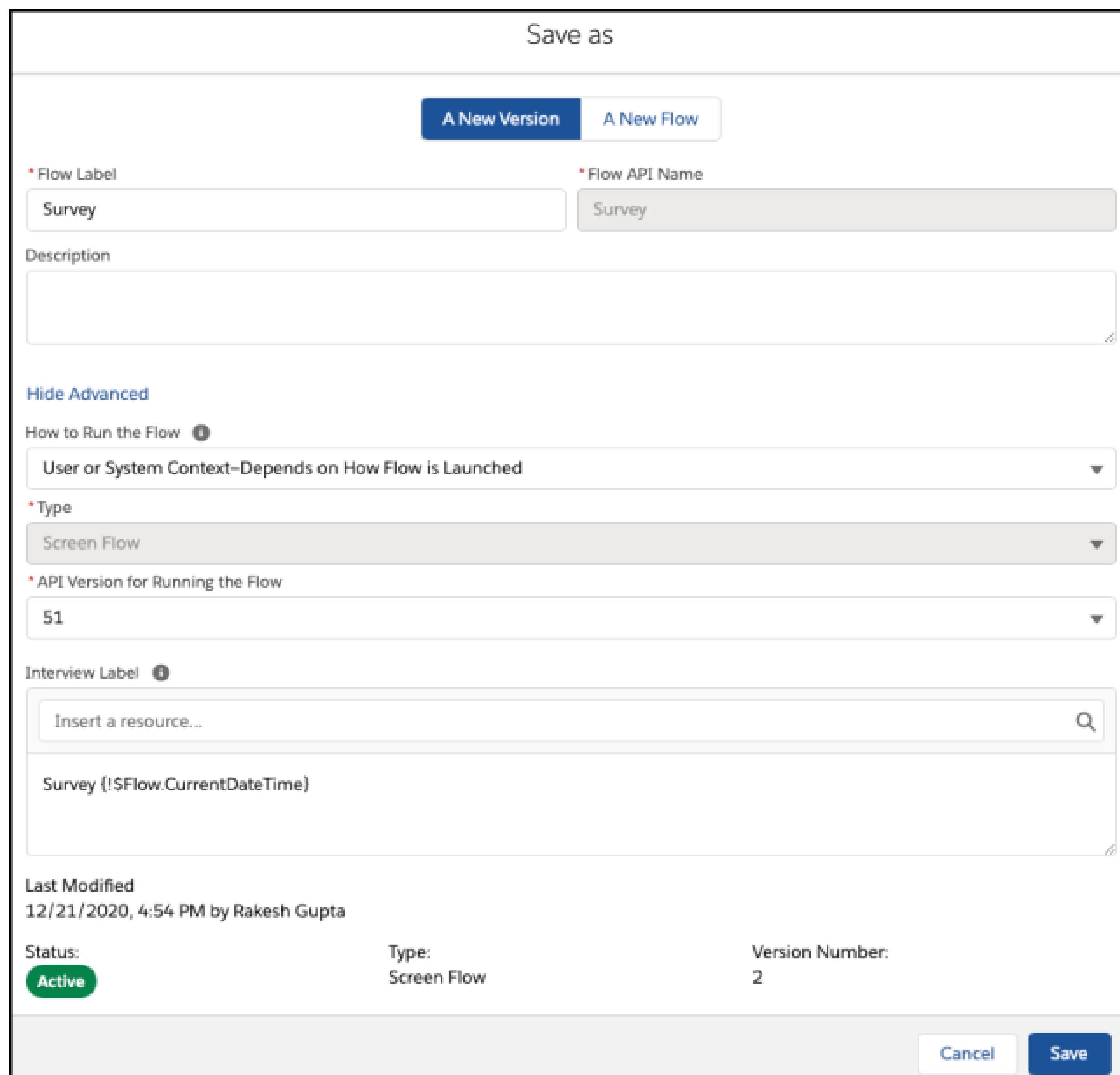
Insert a resource...

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 `LightningOut Dependency` App checkbox.
4. Click Submit.
5. Copy code from [GitHub](#) and paste it into your Lightning Application.
6. Save your code.

The screenshot shows the Eclipse IDE interface. The top menu bar includes File, Edit, Debug, Test, Workspace, Help, and several icons. A toolbar is visible below the menu. The main workspace contains a code editor window titled "VFPageToLC.app *". The code is an Aura component definition:

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

Below the code editor is a blue status bar with the text "Logs, Tests, and Problems".

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

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

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

app. Then write a JavaScript function that creates the component on the page using `$Lightning.createComponent()`

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

The screenshot shows the Visualforce Page Editor interface. At the top, it says "Visualforce Page Survey". Below that is the "Page Edit" toolbar with buttons for Save, Quick Save, Cancel, Where is this used?, Component Reference, and Preview. The "Page Information" section includes fields for Label (Survey), Name (Survey), Description, and checkboxes for "Available for Lightning Experience, Experience Builder sites, and the mobile app" (checked) and "Require CSRF protection on GET requests" (unchecked). Below this is the "Visualforce Markup" tab, which contains the following code:

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

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

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

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

Site Edit

Save Cancel

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

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

G

Next

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

