

Naan Mudhalvan

Salesforce Developer(Course)

Assignment no 1

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Year & Dept : 4<sup>th</sup> year & CSE

Batch : 2024

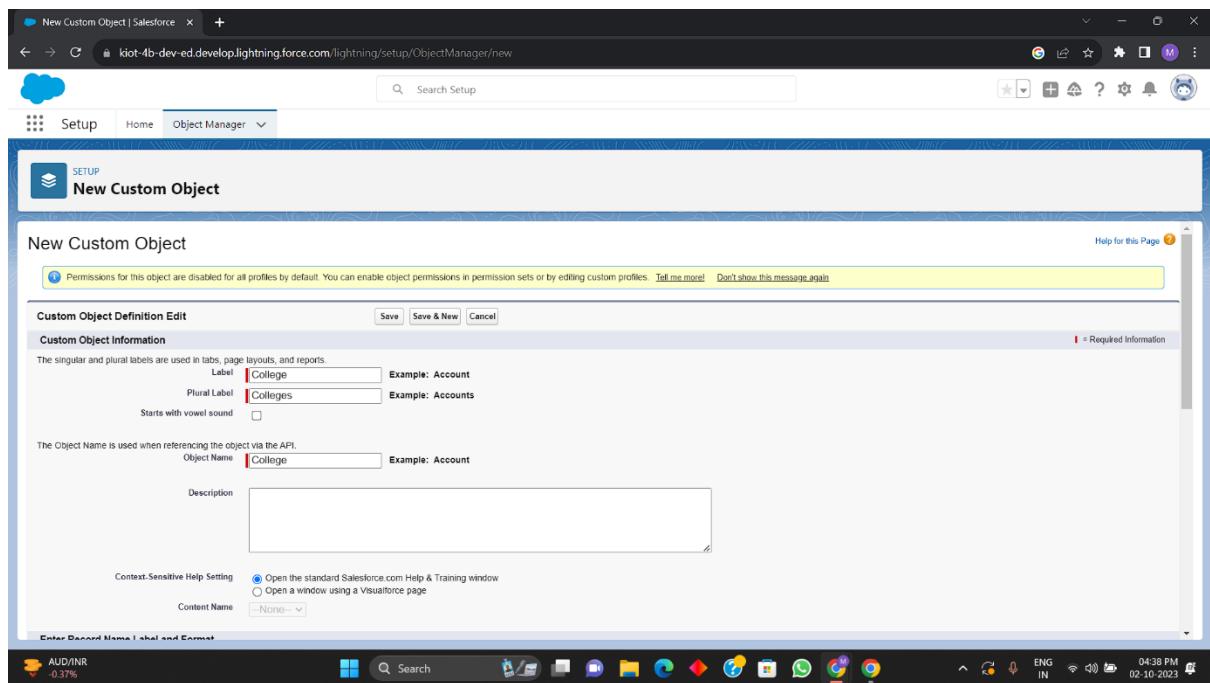
Zone no : Zone 8

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

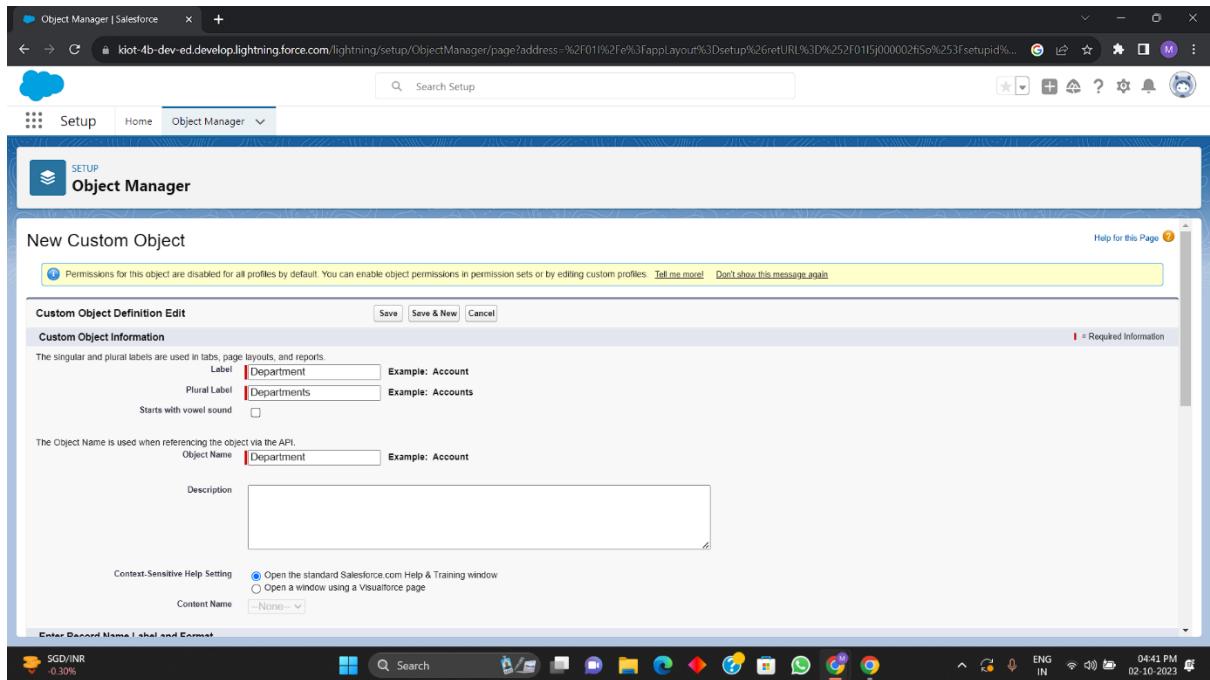
Solution:

## Step 1: Create Custom Objects

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



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



## Step 2: Create a Master-Detail Relationship

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

1. Go to Setup > Object Manager.
2. Click on "College\_\_C" to open its settings.
3. In the left sidebar, click on "Fields & Relationships."
4. Click the "New" button to create a new custom field.
5. Choose "Master-Detail Relationship" as the data type.
6. Enter a label for the relationship, e.g., "Department\_\_C".

7. Choose "Department\_\_C" as the related object.
8. Configure other settings as needed and click "Next."
9. Specify the field-level security and add it to relevant page layouts.
10. Click "Next" and "Save" to create the relationship.

Department | Salesforce

kiot-4b-dev-ed.lightning.force.com/lightning/setup/ObjectManager/015j000002fSt/Details/view

Setup Home Object Manager

Search Setup

Department

SETUP > OBJECT MANAGER

**Details**

Description

API Name: Department\_c

Custom:

Singular Label: Department

Plural Label: Departments

Enable Reports

Track Activities

Track Field History

Deployment Status: Deployed

Help Settings: Standard salesforce.com Help Window

Edit Delete

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

SGD/INR -0.30%

04:42 PM 02-10-2023

Department | Salesforce

kiot-4b-dev-ed.lightning.force.com/lightning/setup/ObjectManager/015j000002fSt/FieldsAndRelationships/view

Setup Home Object Manager

Search Setup

Department

SETUP > OBJECT MANAGER

**Fields & Relationships**

4 items, Sorted by Field Label

| FIELD LABEL      | FIELD NAME     | DATA TYPE          | CONTROLLING FIELD | INDEXED |
|------------------|----------------|--------------------|-------------------|---------|
| Created By       | CreatedBy      | Lookup(User)       |                   |         |
| Department Name  | Name           | Text(80)           |                   | ✓       |
| Last Modified By | LastModifiedBy | Lookup(User)       |                   |         |
| Owner            | OwnerId        | Lookup(User,Group) |                   | ✓       |

Quick Find New Deleted Fields Field Dependencies Set History Tracking

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

SGD/INR -0.30%

04:42 PM 02-10-2023

The image consists of two vertically stacked screenshots of the Salesforce Setup interface.

**Screenshot 1: Creating a Custom Field**

- Page Header:** Department | Salesforce
- URL:** kiot-4b-dev-ed.lightning.force.com/lightning/setup/ObjectManager/015j000002fSt/FieldsAndRelationships/new
- Section:** Department - New Custom Field
- Step:** Step 1. Choose the field type
- Left Sidebar:** Fields & Relationships (selected), Details, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, Scoping Rules, Triggers, Flow Triggers.
- Form Fields:**
  - Data Type:** Radio buttons for None Selected, Auto Number, Formula, Roll-Up Summary (selected), Lookup Relationship, and Master-Detail Relationship.
  - Description:** A text area for specifying the type of information the custom field will contain.
  - Help Text:** Descriptions for each data type option.
- Buttons:** Next, Cancel, Help for this Page.

**Screenshot 2: Creating a Relationship**

- Page Header:** Department | Salesforce
- URL:** kiot-4b-dev-ed.lightning.force.com/lightning/setup/ObjectManager/015j000002fSt/FieldsAndRelationships/new
- Section:** Department - New Relationship
- Step:** Step 2 of 6
- Left Sidebar:** Fields & Relationships (selected), Details, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, Scoping Rules, Triggers, Flow Triggers.
- Form Fields:**
  - Related To:** A dropdown menu showing "College" selected.
- Buttons:** Previous, Next, Cancel, Help for this Page.

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

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

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

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

The screenshot shows the Salesforce Object Manager interface for the 'Department' object. The left sidebar lists various setup options like Page Layouts, Lightning Record Pages, and Buttons, Links, and Actions. The main content area displays the 'Fields & Relationships' section, which lists four items: College, Created By, Department Name, and Last Modified By. The table includes columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED status. The 'College' field is of type Master-Detail(College) and has 'College' as its controlling field. The 'Created By' field is of type Lookup(User). The 'Department Name' field is of type Text(80). The 'Last Modified By' field is of type Lookup(User).

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

The image shows two screenshots of the Salesforce Tabs setup page. The top screenshot displays the main 'Custom Tabs' configuration screen, which lists four categories of tabs: Custom Object Tabs, Web Tabs, Visualforce Tabs, and Lightning Component Tabs. The bottom screenshot shows the 'New Custom Object Tab' wizard, Step 1: Enter the Details, where a user is selecting the object 'Department' and choosing a tab style.

**Custom Tabs**

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

**Custom Object Tabs**

| Action     | Label        | Tab Style | Description       |
|------------|--------------|-----------|-------------------|
| Edit   Del | StudentTable | Box       | Students database |

**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**

New | What Is This?

Help for this Page

**New Custom Object Tab**

Step 1. Enter the Details Step 1 of 3

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

Select an existing custom object or create a new custom object now.

Object: Department

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-

Enter a short description:

Description:

Next | Cancel

Department | Salesforce

kiot-4b-dev-ed.lightning.force.com/lightning/setup/ObjectManager/0115j000002fSt/FieldsAndRelationships/new

Setup Home Object Manager

Department

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

Silver 2.74%

Cloud Search Bar

Help for this Page

Step 4 of 6

Field Label: College  
Data Type: Master-Detail  
Field Name: College  
Description:

These are the field-level settings for a Master-Detail relationship. They cannot be changed.

| Profile                          | Visible | Read Only |
|----------------------------------|---------|-----------|
| Analytics Cloud Integration User | ✓       | □         |
| Analytics Cloud Security User    | ✓       | □         |
| Authenticated Website            | ✓       | □         |
| Authenticated Website            | ✓       | □         |
| Contract Manager                 | ✓       | □         |
| Cross Org Data Proxy User        | ✓       | □         |
| Custom: Marketing Profile        | ✓       | □         |
| Custom: Sales Profile            | ✓       | □         |
| Custom: Support Profile          | ✓       | □         |

Help for this Page

Step 3 of 5

college

New Custom Field

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

Previous Next Cancel

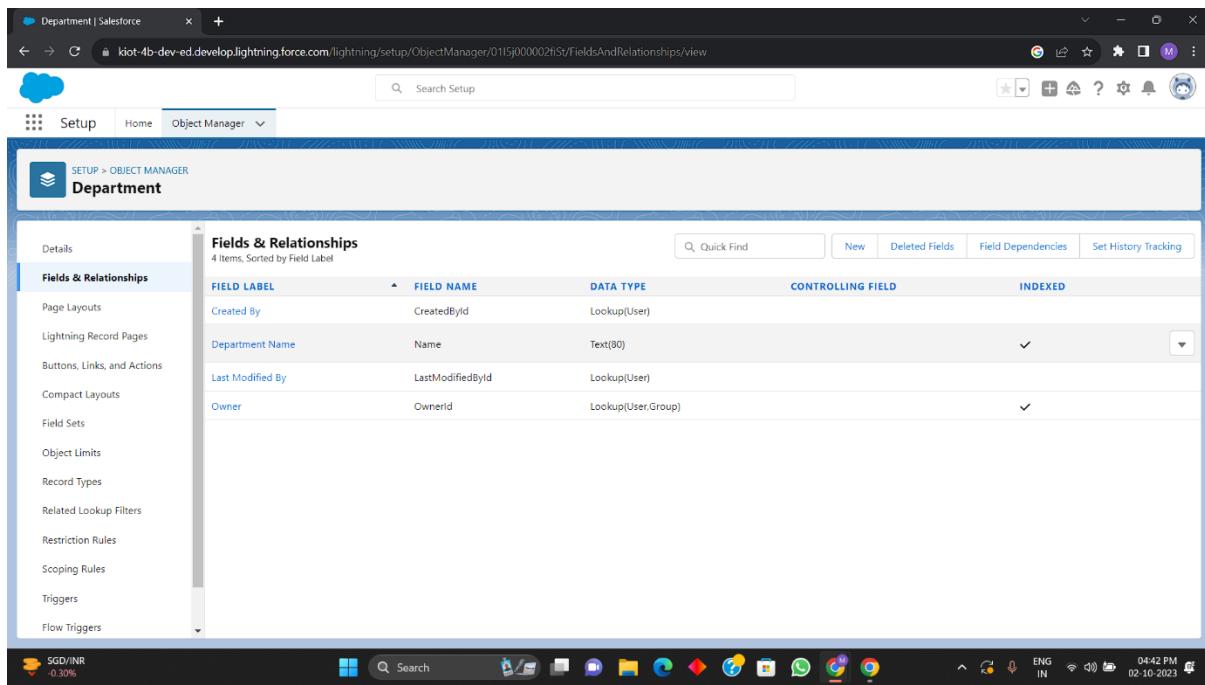
**Department | Salesforce** [kiot-4b-dev-ed.lightning.force.com/lightning/setup/ObjectManager/0115j000002fSt/FieldsAndRelationships/new](#)

The screenshot shows the 'Object Manager' interface for the 'Department' object. The left sidebar lists various configuration options under 'Fields & Relationships'. The main area is titled 'New Relationship' and is on 'Step 3 of 6'. The 'Field Label' is set to 'College', and the 'Field Name' is also 'College'. The 'Description' and 'Help Text' fields are empty. The 'Child Relationship Name' is 'Departments'. Under 'Sharing Setting', 'Read Only' is selected. Under 'Allow Reparenting', 'Child records can be reparented to other parent records after they are created' is checked. Under 'Auto add to custom report type', 'Add this field to existing custom report types that contain this entry' is checked. The status bar at the bottom indicates it's a Silver profile with 2.74% completion.

**Department | Salesforce** [kiot-4b-dev-ed.lightning.force.com/lightning/setup/ObjectManager/0115j000002fSt/FieldsAndRelationships/new](#)

The screenshot shows the 'Object Manager' interface for the 'Department' object. The left sidebar lists various configuration options under 'Fields & Relationships'. The main area is titled 'New Custom Field' and is on 'Step 1'. The 'Data Type' section is open, showing options like 'None Selected', 'Auto Number', 'Formula', 'Roll-Up Summary', 'Lookup Relationship', and 'Master-Detail Relationship'. 'Master-Detail Relationship' is selected. The status bar at the bottom indicates it's a Silver profile with 2.74% completion.



## Step 4: Create a Lightning App

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

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

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

The screenshot shows the Salesforce Setup interface with the 'Tabs' tab selected. A search bar at the top right contains the text 'Search Setup'. The main content area is titled 'New Custom Object Tab' and is currently on 'Step 2 of 3'. The sub-step title is 'Add to Profiles'. It asks to choose user profiles for the new custom tab. Two radio buttons are available: 'Apply one tab visibility to all profiles' (selected) and 'Apply a different tab visibility for each profile'. A list of profiles is provided on the left, and their corresponding 'Tab Visibility' dropdowns are on the right, all set to 'Default On'. The status bar at the bottom shows '30°C Windy' and the date '02-10-2023'.

The screenshot shows the Salesforce Setup interface with the 'Tabs' tab selected. A search bar at the top right contains the text 'Search Setup'. The main content area is titled 'New Custom Object Tab' and is currently on 'Step 1 of 3'. The sub-step title is 'Enter the Details'. It asks to choose a custom object for the new tab. A dropdown menu for 'Object' is open, showing 'Department' as the selected option. Below it, a 'Tab Style' dropdown shows 'Jewel'. An optional field 'Splash Page Custom Link' is set to 'None'. A text input field for 'Description' is empty. The status bar at the bottom shows '30°C Windy' and the date '02-10-2023'.

Salesforce Setup - Tabs

Custom Tabs page

Step 3 of 3: Add to Custom Apps

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"/> |

Custom Tab Details

Object: College

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

Salesforce Setup - Tabs

New Custom Object Tab

Step 1 of 3: Enter the Details

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: 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

Salesforce Tabs

Custom Tabs

Custom Object Tabs

| Action     | Label         | Tab Style | Description       |
|------------|---------------|-----------|-------------------|
| Edit   Del | Colleges      | Lightning |                   |
| Edit   Del | Departments   | Jewel     |                   |
| Edit   Del | Student table | Box       | Students database |

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

AUD/INR -0.41%

Search

ENG IN 04:54 PM 02-10-2023

New Lightning App

App Details & Branding

App Details

\* App Name: My college

\* Developer Name: My\_college

Description: Enter a description...

App Branding

Image:  Primary Color Hex Value: #007002

Org Theme Options: Use the app's image and color instead of the org's custom theme

Next

Salesforce Apps

Queue Management

Sales

LightningSales

QueueManagement

Sales

LightningSales

22/08/2023, 10:44 am

22/08/2023, 10:44 am

22/08/2023, 10:44 am

Lightning

Lightning

Lightning

SGD/INR -0.33%

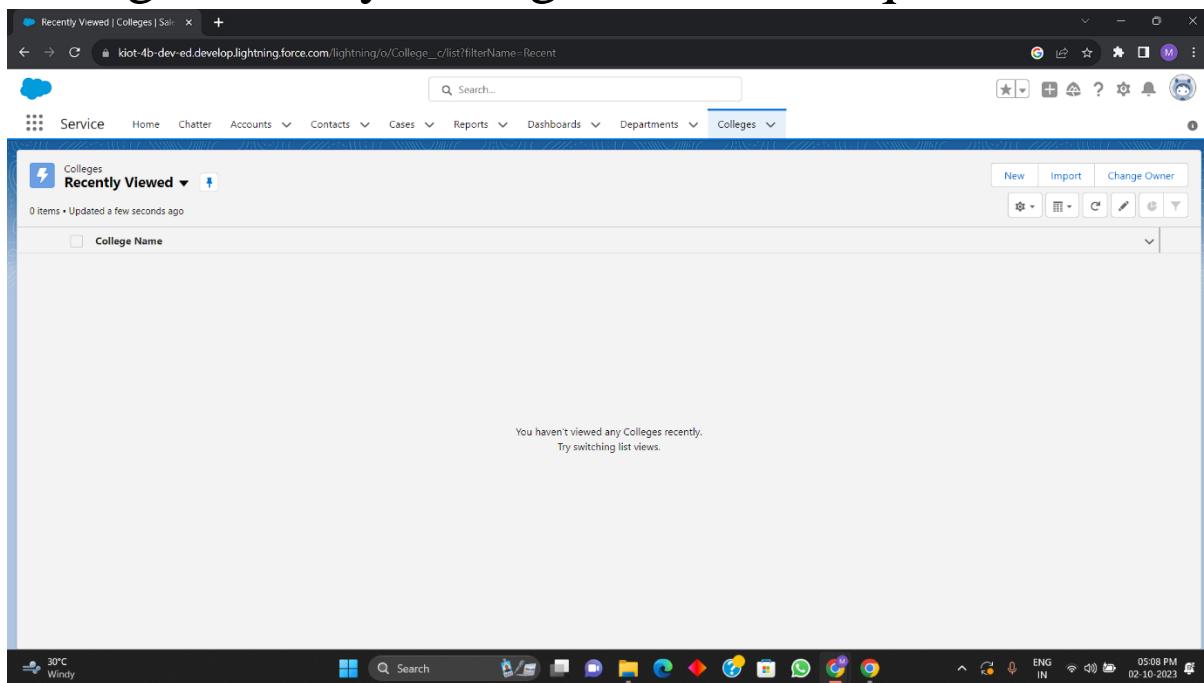
Search

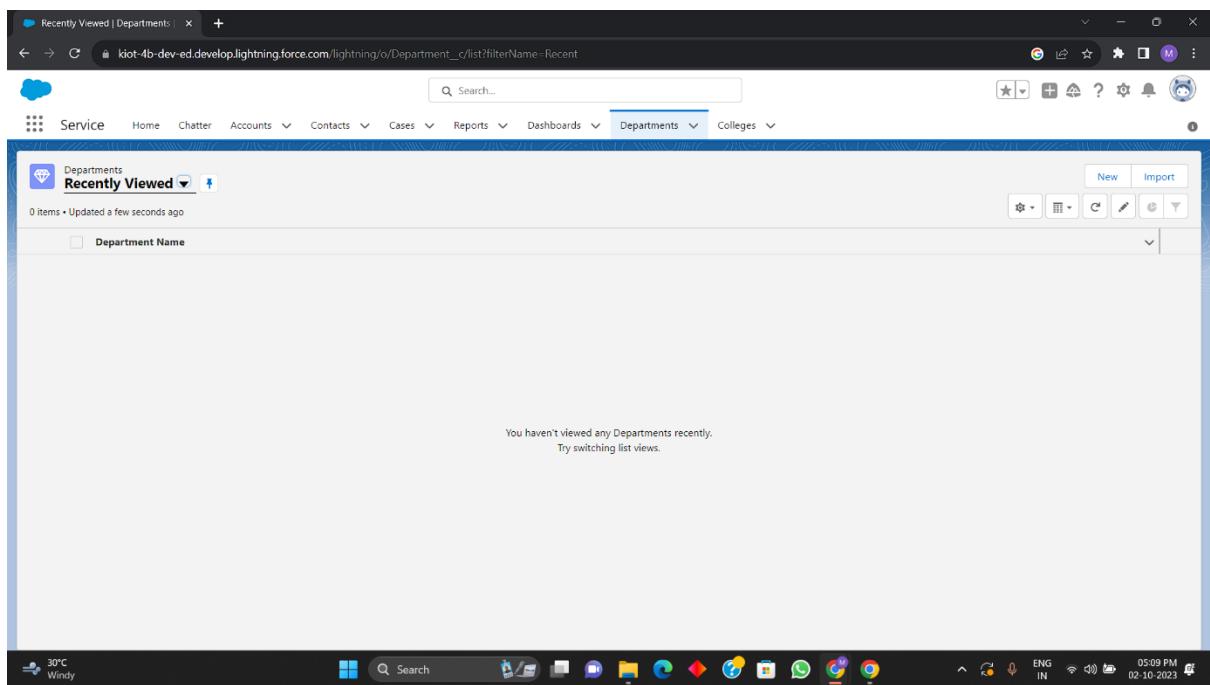
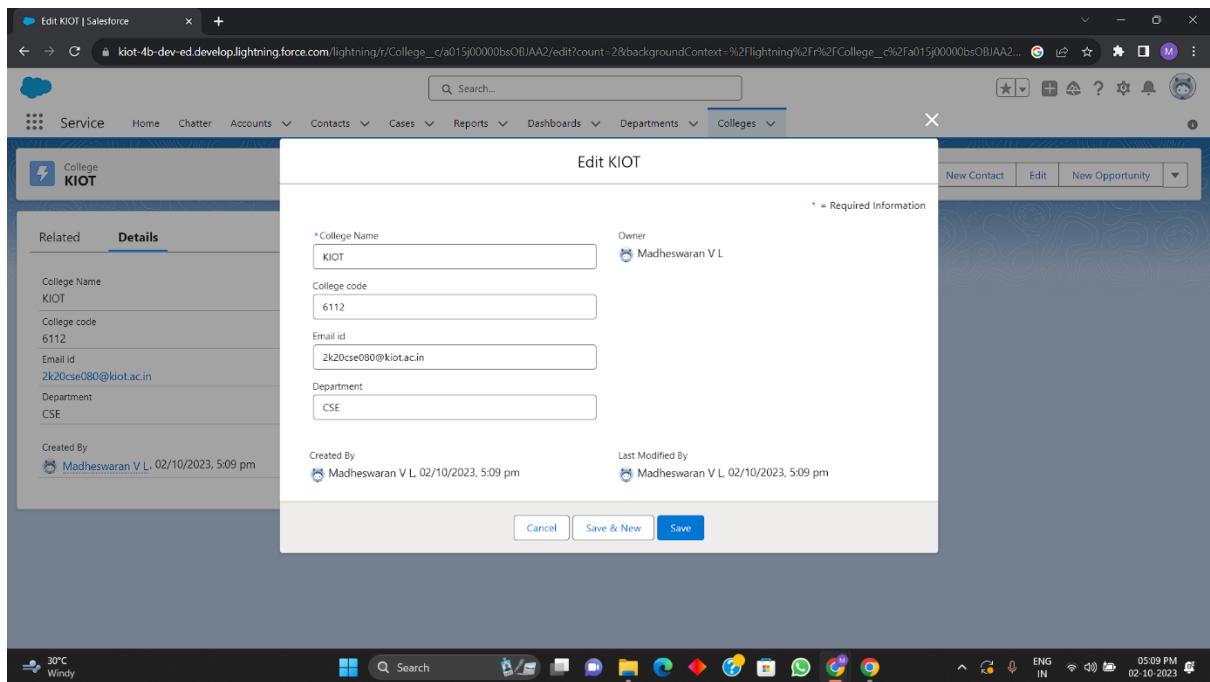
ENG IN 04:57 PM 02-10-2023

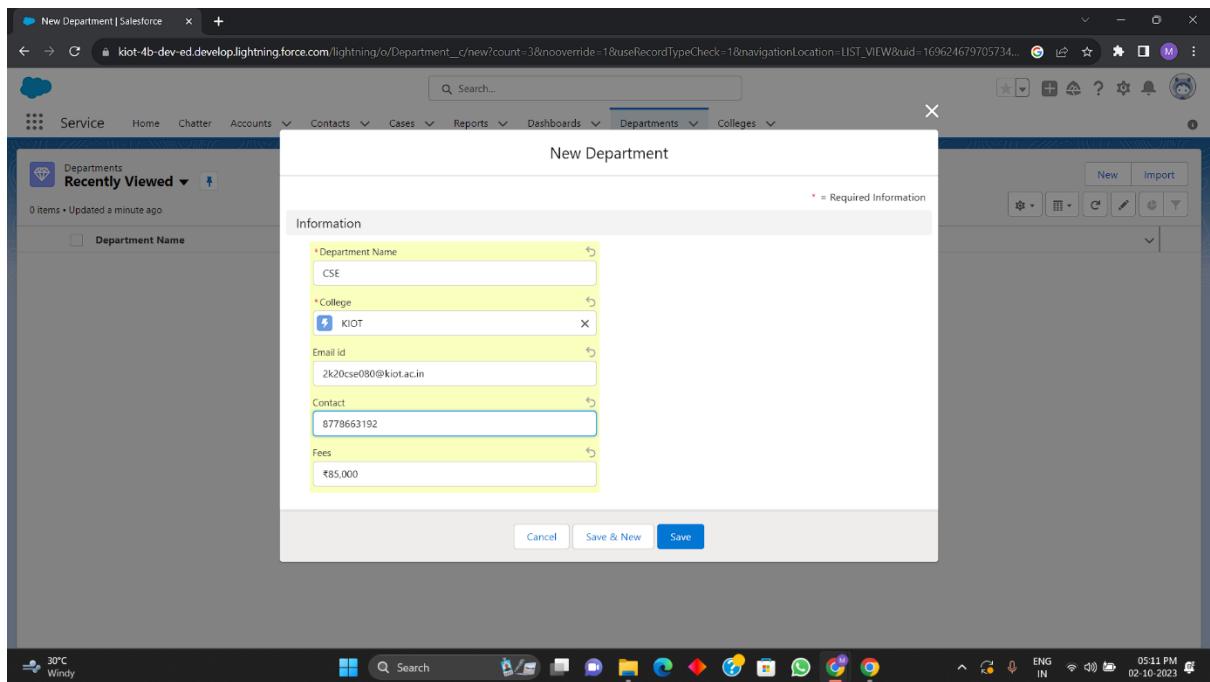
## Conclusion:

Now, whenever you create or update a record in the "Department\_\_C" related to a "College\_\_C," the "Total Count" field on the "College\_\_C" will automatically update to show the total number of related records.

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







CSE | Department | Salesforce

kiot-4b-dev-ed.lightning.force.com/lightning/r/Department\_c/a025j00000ejzTtAAI/view

Service Home Chatter Accounts Cases Reports Dashboards Departments Colleges

Department CSE was created.

Related Details

Department Name  
CSE

College  
KIOT

Email id  
2k20cse080@kiot.ac.in

Contact  
8778663192

Fees  
₹65,000

Created By  
Madheswaran V L, 02/10/2023, 5:11 pm

Last Modified By  
Madheswaran V L, 02/10/2023, 5:11 pm

30°C Windy

Search

ENG IN 05:11 PM 02-10-2023

30°C Windy

Search

ENG IN 05:09 PM 02-10-2023

Recently Viewed | Colleges | Sales

kiot-4b-dev-ed.lightning.force.com/lightning/o/College\_\_c/list?filterName=Recent

Service Home Chatter Accounts Contacts Cases Reports Dashboards Departments Colleges

Search...

New Import Change Owner

College Name

1 KIOT

Recently Viewed | Departments

kiot-4b-dev-ed.lightning.force.com/lightning/o/Department\_\_c/list?filterName=Recent

Service Home Chatter Accounts Contacts Cases Reports Dashboards Departments Colleges

Search...

New Import

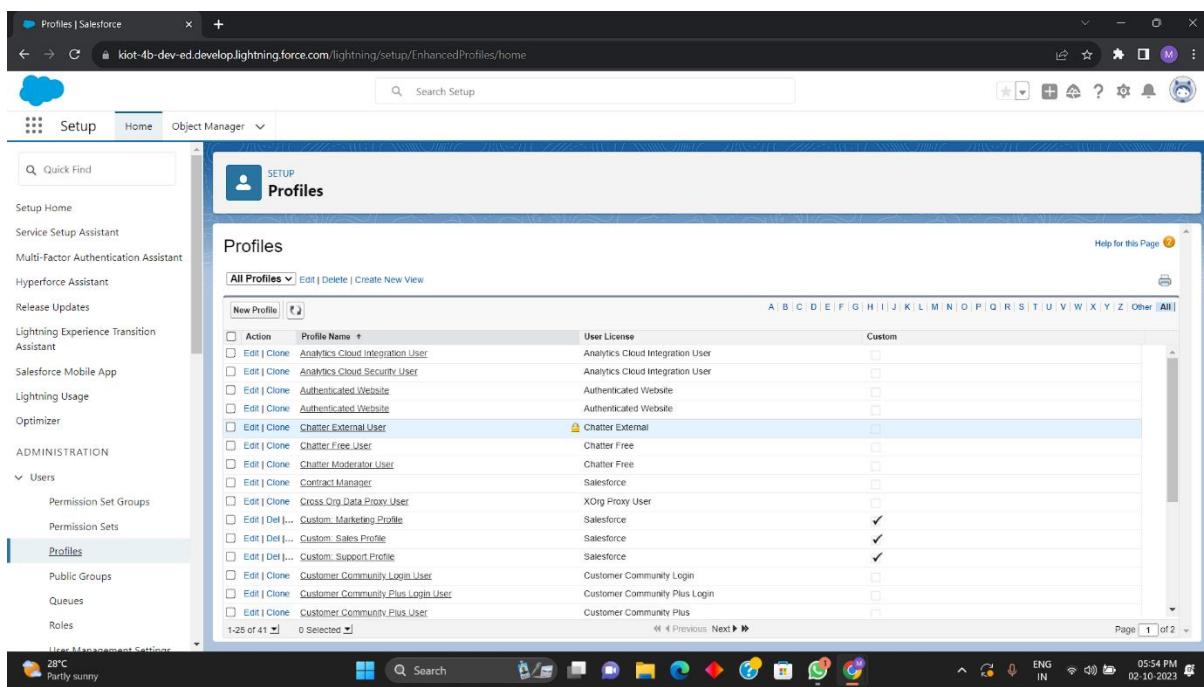
Department Name

1 CSE

**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 'All Profiles' dropdown is selected. The table includes columns for Action, Profile Name, User License, and Status (Custom). Several profiles are listed, including 'Analytics Cloud Integration User', 'Analytics Cloud Security User', 'Authenticated Website', 'Authenticator Website', 'Chatter External User', 'Chatter Free User', 'Chatter Moderator User', 'Contract Manager', 'Cross Org Data Proxy User', 'Custom Marketing Profile', 'Custom Sales Profile', 'Custom Support Profile', 'Customer Community Login User', 'Customer Community Plus Login User', and 'Customer Community Plus User'. The 'Chatter External' profile is highlighted with a blue selection bar. The status column shows 'Custom' for most profiles and a checkmark for 'Salesforce' for the last three. The bottom of the page shows a navigation bar with 'Page 1 of 2'.

The screenshot displays two instances of the Salesforce Setup interface. The top instance shows the 'Profiles' page with a list of existing profiles. The bottom instance shows a 'Clone Profile' dialog.

**Profiles Page (Top Window):**

- Left Sidebar:** Includes links for Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, and ADMINISTRATION (with sub-links for Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, and Roles).
- Header:** Shows the URL `kiot-4b-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/home`.
- Content:** A table listing profiles with columns for Action, Profile Name, User License, and Status. Examples include 'Salesforce API Only System Integrations' (Custom), 'Silver Partner User' (Silver Partner), and 'Standard Platform User' (Salesforce).

**Clone Profile Dialog (Bottom Window):**

- Left Sidebar:** Same as the top window.
- Header:** Shows the URL `kiot-4b-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F_u%2fperms%2fprofile%2fProfileClone%2Fe%3Fid%CD00e5j000004fbO2%26setupid...`.
- Content:** A dialog titled 'Clone Profile' with the instruction 'Enter the name of the new profile.' It contains fields for 'Existing Profile' (set to 'Standard Platform User'), 'User License' (set to 'Salesforce Platform'), and 'Profile Name' (a redacted input field). Buttons for 'Save' and 'Cancel' are at the bottom.

The screenshot displays two instances of the Salesforce Setup interface. The top instance shows the 'Clone Profile' screen, where a new profile named 'Manager' is being created by cloning the 'Standard Platform User'. The bottom instance shows the 'Manager' profile details, including its name, license, and various permissions and layouts.

**Clone Profile**

You must select an existing profile to clone from.

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

**Manager**

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 Definition Access | Enabled Flow Access             | Enabled Service Presence Status Access | Enabled Custom Permissions      |  |
|                                     |  |                                 |  |                                 |  |

**Profile Detail**

|              |                                     |
|--------------|-------------------------------------|
| Name         | Manager                             |
| User License | Salesforce Platform                 |
| Description  |                                     |
| Created By   | Madheswaran.V.L 02/10/2023, 5:57 pm |
| Modified By  | Madheswaran.V.L 02/10/2023, 5:57 pm |

**Page Layouts**

| Standard Object Layouts    | Global                            | Operating Hours                  |
|----------------------------|-----------------------------------|----------------------------------|
| Email Application          | Not Assigned                      | Order                            |
| Home Page Layout           | Home Page Default                 | Order Line Item                  |
| Account                    | Account Layout                    | Order Product                    |
| Alternative Payment Method | Alternative Payment Method Layout | Payment                          |
| Appointment Invitation     | Appointment Invitation Layout     | Payment Authorization            |
|                            |                                   | Payment Authorization Adjustment |

Profiles | Salesforce

kiot-4b-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j000000rHM3%2Fe%3fretURL%3D%252F00e5j000000rHM3%253fsetupid%253DEnh...

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

28°C Partly sunny

SETUP Profiles

Profile Edit Manager

Set the permissions and page layouts for this profile.

**Profile Edit**

Name: Manager  
User License: Salesforce Platform  
Description:

**Custom App Settings**

|                                      | Visible                             | Default                          |                              | Visible                  | Default                          |
|--------------------------------------|-------------------------------------|----------------------------------|------------------------------|--------------------------|----------------------------------|
| Analytics Studio (standard_Insights) | <input type="checkbox"/>            | <input checked="" type="radio"/> | Platform (standard_Platform) | <input type="checkbox"/> | <input checked="" type="radio"/> |
| App Launcher (standard_AppLauncher)  | <input type="checkbox"/>            | <input checked="" type="radio"/> | WDC (standard_Work)          | <input type="checkbox"/> | <input checked="" type="radio"/> |
| My college (My_college)              | <input checked="" type="checkbox"/> | <input type="radio"/>            |                              |                          |                                  |

**Service Provider Access**

**Tab Settings**

Overwrite users' personal tab customizations

Profile Edit Manager

Name: Manager  
User License: Salesforce Platform  
Description:

**Custom Object Permissions**

| Object                    | Basic Access                        |                                     |                                     |                                     |                          | Data Administration      |                                     |                                     |                                     |                                     |                          |
|---------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|--------------------------|--------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|--------------------------|
|                           | Read                                | Create                              | Edit                                | Delete                              | View All                 | Modify All               | Read                                | Create                              | Edit                                | Delete                              | View All                 |
| Contacts                  | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" 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"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" 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"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" 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"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" 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"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Sellers                   | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" 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"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" 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"/> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> |

**Session Settings**

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: -None-

**Password Policies**

User passwords expire in: 90 days  
Enforce password history: 3 passwords remembered  
Minimum password length: 8  
Password complexity requirement: Must include alpha and numeric characters  
Password question requirement: Cannot contain password

ENG IN 05:58 PM 02-10-2023

Profiles | Salesforce

kiot-4b-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j000000rHM3%2Fe%3fretURL%3D%252F00e5j000000rHM3%253fsetupid%253DEnh...

Setup Home Object Manager

Quick Find

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

28°C Partly sunny

Setup Home Object Manager

Quick Find

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

28°C Partly sunny

Profiles

Search Setup

Push Topics

Contacts Contact Point Addresses Contact Point Consents Contact Point Emails

Sellers Streaming Channels User External Credentials

Custom Object Permissions

|             | Basic Access             | Create                   | Edit                     | Delete                   | View All                            | Modify All                          | Basic Access             | Create                   | Edit                     | Delete                   | View All                 | Modify All               |
|-------------|--------------------------|--------------------------|--------------------------|--------------------------|-------------------------------------|-------------------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Colleges    | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Departments | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

|                                  |   |
|----------------------------------|---|
| User passwords expire in:        | 90 days                                   |
| Enforce password history:        | 3 passwords remembered                    |
| Minimum password length:         | 8   |
| Password complexity requirement: | Must include alpha and numeric characters |
| Password question requirement:   | Cannot contain password                   |

College Departments Student table Survey Results

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

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

Save Save & New Cancel

**Users | Salesforce**

kiot-4b-dev-ed.lightning.force.com/lightning/setup/ManageUsers/home

Setup Home Object Manager

Lightning Usage Optimizer

ADMINISTRATION

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

PLATFORM TOOLS

- Subscription Management
- Apps
- Feature Settings
- Slack
- MuleSoft

28°C Partly sunny

Users | Salesforce

kiot-4b-dev-ed.lightning.force.com/lightning/setup/ManageUsers/page?address=%2f005%2Fe%3FretURL%3D%252FD05%253FisUserEntityOverride%253D1%2526retURL%253D%25...

Setup Home Object Manager

Lightning Usage Optimizer

ADMINISTRATION

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

PLATFORM TOOLS

- Subscription Management
- Apps
- Feature Settings
- Slack
- MuleSoft

28°C Partly sunny

Users | Salesforce

kiot-4b-dev-ed.lightning.force.com/lightning/setup/ManageUsers/page?address=%2f005%2Fe%3FretURL%3D%252FD05%253FisUserEntityOverride%253D1%2526retURL%253D%25...

Setup Home Object Manager

Lightning Usage Optimizer

ADMINISTRATION

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

PLATFORM TOOLS

- Subscription Management
- Apps
- Feature Settings
- Slack
- MuleSoft

Tomorrow's high  
Near record

**Users**

All Users

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

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

View: All Users | Edit | Create New View

| Action                   | Full Name             | Alias   | Username  | Role                   | Active                              | Profile                          |
|--------------------------|-----------------------|---------|---|------------------------|-------------------------------------|----------------------------------|
| <input type="checkbox"/> | Chatter Expert        | Chatter | chatty_005@000000crmtea3.insightsecunv@00ds@000000crmtea3.com |                        | <input checked="" type="checkbox"/> | Chatter Free User                |
| <input type="checkbox"/> | Edit User Integration | integ   | integration@00d5@000000crmtea3.com                            |                        | <input checked="" type="checkbox"/> | Analytics Cloud Integration User |
| <input type="checkbox"/> | Edit User Security    | sec     | insightsecunv@00ds@000000crmtea3.com                          |                        | <input checked="" type="checkbox"/> | Analytics Cloud Security User    |
| <input type="checkbox"/> | V.L. Madheswaran      | MV.L    | venkat@student.com  |                        | <input checked="" type="checkbox"/> | System Administrator             |
| <input type="checkbox"/> | V.L. Madheswaran22    | mvj     | mvee123@gmail.com   | Director_Channel Sales | <input checked="" type="checkbox"/> | Madhes                           |

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

Help for this Page

**Users**

New User

User Edit

General Information

I = Required Information

|            |                        |                                   |                                     |
|------------|------------------------|-----------------------------------|-------------------------------------|
| First Name | venkat                 | Role                              | <None Specified>                    |
| Last Name  | madhes                 | User License                      | Salesforce Platform                 |
| Alias      | vmadhe                 | Profile                           | Manager                             |
| Email      | 2k20cse080@kiot.ac.in  | Active                            | <input checked="" type="checkbox"/> |
| Username   | 2k20cse080@kiot.ac.in  | Marketing User                    | <input type="checkbox"/>            |
| Nickname   | User169625016489044796 | Offline User                      | <input type="checkbox"/>            |
| Title      | worker                 | Knowledge User                    | <input type="checkbox"/>            |
| Company    | Kiot                   | Flow User                         | <input type="checkbox"/>            |
| Department |                        | Service Cloud User                | <input type="checkbox"/>            |
| Division   |                        | Site.com Contributor User         | <input type="checkbox"/>            |
|            |                        | Site.com Publisher User           | <input type="checkbox"/>            |
|            |                        | WDC User                          | <input type="checkbox"/>            |
|            |                        | Data.com User Type                | -None-                              |
|            |                        | Data.com Monthly Addition Limit   | Default Limit (300)                 |
|            |                        | Accessibility Mode (Classic Only) | <input type="checkbox"/>            |
|            |                        | High-Contrast Palette on Charts   | <input type="checkbox"/>            |

Save | Save & New | Cancel

ENG IN 06:00 PM 02-10-2023

ENG IN 06:09 PM 02-10-2023

The image shows a dual-monitor setup. The left monitor displays the Salesforce Setup interface, specifically the 'Users' section for a user named 'venkat madhes'. The right monitor displays a Gmail inbox with an incoming email from 'support@salesforce.com' with the subject 'Welcome to Salesforce: Verify your account'.

**Salesforce Setup - Left Monitor:**

- Left Sidebar:** Includes 'Lightning Usage', 'Optimizer', 'ADMINISTRATION' (with 'Users' selected), 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', and 'Data', 'Email', 'Subscription Management', 'Apps', 'Feature Settings', 'Slack', and 'MuleSoft'.
- Central Area:** Shows 'User Detail' for 'venkat madhes'. Fields include Name (venkat madhes), Alias (vmadhe), Email (2k20cse080@kiot.ac.in), Username (2k20cse080@kiot.ac.in), Nickname (User15962501648904479626), Title (worker), Company (Kiot), Department, Division, Address, Time Zone (GMT+05:30) India Standard Time (Asia/Kolkata), Locale (English (India)), Language (English), Delegated Approver (Manager), Receive Approval Request Emails (Only if I am an approver), Federation ID, and App Registration (One-Time Password). Roles listed include Active (Marketing User, Offline User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User), User License Profile (Salesforce Platform Manager), and Mobile Push Registrations (Data.com User type).

**Gmail - Right Monitor:**

- Left Sidebar:** Shows 'Compose', 'Inbox' (3,114 messages), 'Starred', 'Snoozed', 'Sent', 'Drafts' (1 message), and 'More'.
- Central Area:** Displays an incoming email from 'support@salesforce.com' with the subject 'Welcome to Salesforce: Verify your account'. The email body contains a 'Welcome to Salesforce!' message, a 'Verify Account' button, and a URL: <https://kiot-4b-dev-ed-develop.my.salesforce.com>. It also includes a note about saving the URL for later log-in and the recipient's username: '2k20cse080@kiot.ac.in'.

Salesforce

### Change Your Password

Enter a new password for 2k20cse@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 03/10/2023, 10:16 am.

27°C Mostly sunny

Users | Salesforce | Welcome to Salesforce: Verify your email | kiot-4b-dev-ed.develop.my.salesforce.com/home/home.jsp | Post Attendee - Zoom

Salesforce

### Sell, market, and service with the world's #1 CRM.

Welcome to the Salesforce Customer Success Platform. Our new Lightning Platform gives you the fastest, most complete way to put your customers at the centre of everything you do.

WATCH DEMOS | FREE TRIAL

Jay Sharma  
Loyalty Member

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Welcome to Salesforce: Verify your account

Recently Viewed | Student table

CSE | Department | Salesforce

My college

Recently Viewed

0 items • Updated a few seconds ago

Student table

Name

Mark

E-mail

Dept

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

New Student table

Information

\* = Required Information

Owner: Madheswaran V L

| Field         | Value          |
|---------------|----------------|
| Student table | student 1      |
| Name          | jack           |
| Mark          | 540            |
| E-mail        | jack@gmail.com |
| Dept          | CSE            |

Cancel Save & New Save

31°C Sunny

Search

ENG IN 12:17 PM 03-10-2023

31°C Sunny

Search

ENG IN 12:18 PM 03-10-2023

The image displays two screenshots of a computer desktop interface, likely from a Windows operating system, showing different views of the Salesforce platform.

**Salesforce Lightning Record Detail Page:**

- Title Bar:** Welcome to Salesforce: Verify y... | student 1 | Student table | Sales... | CSE | Department | Salesforce
- Header:** My college | student 1 | Student table | Search...
- Record View:** Student table student 1. Details for student 1: Name (jack), Mark (540), E-mail (jack@gmail.com), Dept (CSE). Owner: Madheswaran V L.
- Related:** Shows the same record details.
- Details:** Shows the same record details.
- Activity:** No activities to show. Get started by sending an email, scheduling a task, and more.
- Chatter:** No past activity. Past meetings and tasks marked as done show up here.

**Salesforce Setup Profiles Page:**

- Title Bar:** 31°C Sunny | Users | Salesforce | Welcome to Salesforce: Verify y... | Profiles | Salesforce
- Header:** Setup | Home | Object Manager | Search Setup
- Left Sidebar:** 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 (selected), Public Groups, Queues, Roles, User Management Settings.
- Content Area:** **Profiles** page. All Profiles view. A table lists profiles: Salesforce API Only System Integrations (User License: Salesforce Integration, Custom), Silver Partner User (User License: Silver Partner, Custom), Solution Manager (User License: Salesforce, Custom), Standard Platform User (User License: Salesforce Platform, Custom), Standard User (User License: Salesforce, Custom), System Administrator (User License: Salesforce, Custom).
- Bottom:** Page navigation, search bar, and system status bar (26°C, Mostly sunny).

The screenshot displays two stacked screenshots of the Salesforce Setup interface.

**Top Screenshot:** The title bar shows the URL `kiot-4b-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F_u%2Fperms%2Fui%2FprofileClone%2Fe%3Fid%3D00e5j000004foQ2%26setupid...`. The page is titled "Clone Profile". It instructs the user to "You must select an existing profile to clone from." A dropdown menu shows "Existing Profile: Standard Platform User", "User License: Salesforce Platform", and "Profile Name: salesmanager". Buttons for "Save" and "Cancel" are at the bottom.

**Bottom Screenshot:** The title bar shows the URL `kiot-4b-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j00000riIMI%3Fsetupid%3DEnhancedProfiles`. The page is titled "Profiles" and shows a single profile named "salesmanager". The "Profile Detail" section includes fields for Name (salesmanager), User License (Salesforce Platform), Description, Created By (Madheswaran.V.L), Modified By (Madheswaran.V.L), and a "Custom Profile" checkbox which is checked. Below this, the "Page Layouts" section lists various standard object layouts and their global operating hours assignments. The operating hours assignments include "Global Layout [View Assignment]", "Order Layout [View Assignment]", "Order Product Layout [View Assignment]", "Payment Layout [View Assignment]", "Payment Authorization Layout [View Assignment]", and "Payment Authorization Adjustment Layout [View Assignment]".

The screenshot displays two stacked screenshots of the Salesforce Setup interface, specifically the Profiles section.

**Top Screenshot (Profile Edit):**

- Profile Edit:** A modal window titled "Profile Edit" for the profile "salesmanager".
  - Name:** salesmanager
  - User License:** Salesforce Platform
  - Description:** (empty)
  - Custom Profile:**
  - Custom App Settings:** Shows settings for Analytics Studio, App Launcher, and WDC.
  - Service Provider Access:** Shows settings for Tab Settings.
- Bottom Screenshot (Session Settings):** A modal window titled "Profiles" showing Session Settings.
  - Session Settings:** Session Times Out After: 2 hours of inactivity; Session Security Level Required at Login: -None--
  - Password Policies:** User passwords expire in: 90 days; Enforce password history: 3 passwords remembered; Minimum password length: 8; Password complexity requirement: Must include alpha and numeric characters; Password question requirement: Cannot contain password; Maximum invalid login attempts: 10; Lockout effective period: 15 minutes; Obscure secret answer for password resets: ; Require a minimum 1 day password lifetime: ; Don't immediately expire links in forgot password emails:

The left sidebar of both screenshots shows the following navigation paths under "ADMINISTRATION":

- Users
  - Permission Set Groups
  - Permission Sets
  - Profiles** (selected)
  - Public Groups
  - Queues
  - Roles
- Lightning Experience Transition Assistant
- Salesforce Mobile App
- Lightning Usage
- Optimizer

The bottom status bar shows the date and time as 02-10-2023 and 06:21 PM.

Users | Salesforce    Welcome to Salesforce: Verify your...    Users | Salesforce    Post Attendee - Zoom

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

27°C Mostly sunny

Users | Salesforce    Welcome to Salesforce: Verify your...    Users | Salesforce    Post Attendee - Zoom

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

27°C Mostly sunny

**New User**

User Edit    Save    Save & New    Cancel

**General Information**

|            |                        |                                   |                                     |
|------------|------------------------|-----------------------------------|-------------------------------------|
| First Name | Laksh                  | Role                              | <None Specified>                    |
| Last Name  | V                      | User License                      | Salesforce Platform                 |
| Aliases    | Iv                     | Profile                           | salesmanager                        |
| Email      | 2k20cse080@kiot.ac.in  | Active                            | <input checked="" type="checkbox"/> |
| Username   | 2k20cse080@kiot.ac.in  | Marketing User                    | <input type="checkbox"/>            |
| Nickname   | User169630804027581014 | Offline User                      | <input type="checkbox"/>            |
| Title      | worker                 | Knowledge User                    | <input type="checkbox"/>            |
| Company    | Kiot                   | Flow User                         | <input type="checkbox"/>            |
| Department | sales                  | Service Cloud User                | <input type="checkbox"/>            |
| Division   |                        | Site.com Contributor User         | <input type="checkbox"/>            |
|            |                        | Site.com Publisher User           | <input type="checkbox"/>            |
|            |                        | WDC User                          | <input type="checkbox"/>            |
|            |                        | Data.com User Type                | -None-                              |
|            |                        | Data.com Monthly Addition Limit   | Default Limit (300)                 |
|            |                        | Accessibility Mode (Classic Only) | <input type="checkbox"/>            |
|            |                        | High-Contrast Palette on Charts   | <input type="checkbox"/>            |

**Single Sign On Information**

Federation ID

**Locale Settings**

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

**Approver Settings**

Delegated Approver  
Manager  
Receive Approval Request Emails: Only if I am an approver  
 Generate new password and notify user immediately

ENG IN 10:15 AM 03-10-2023

ENG IN 10:15 AM 03-10-2023

The screenshot shows the Salesforce Setup interface with the 'Users' page open. The left sidebar includes links for Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, Administration, and Users. Under Users, there are links for Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, and User Management Settings.

The main content area displays the 'Users' page with fields for Street (90/1, Vasantha Nagar, Suramangalam), City (Salem), Zip/Postal Code (636005), State/Province (Tamilnadu), and Country (India). It also includes sections for Single Sign On Information (Federation ID), Locale Settings (Time Zone (GMT+05:30) India Standard Time (Asia/Kolkata), Locale English (India), Language English), Approver Settings (Delegated Approver, Manager, Receive Approval Request Emails (Only if I am an approver), Generate new password and notify user immediately checked), and a note about Federation ID.

The screenshot shows the 'User Detail' page for a user named Laksh V. The page includes tabs for User ProfileHelp for this Page, User Set Assignments, Permission Set Assignments, Activation Required, Permission Set Group Assignments, Permission Set License Assignments, Personal Groups, Public Group Membership, Queue Membership, Team, Managers in the Role Hierarchy, OAuth Apps, Third-Party Account Links, Installed Mobile Apps, Authentication Settings for External Systems, Login History, and User Provisioning Accounts.

The User Detail section shows the following information:

| Name                            | Laksh V  | Role                              | Salesforce Platform                 |
|---------------------------------|--|-----------------------------------|-------------------------------------|
| Alias                           | Iv   | User License                      | salesmanager                        |
| Email                           | 2k20cse080@kiot.ac.in [Verify]   | Profile                           |                                     |
| Username                        | 2k20cse@kiot.ac.in   | Active                            | <input checked="" type="checkbox"/> |
| Nickname                        | User15963080402758101401   | Marketing User                    | <input type="checkbox"/>            |
| Title                           | worker   | Offline User                      | <input type="checkbox"/>            |
| Company                         | Kiot   | Knowledge User                    | <input type="checkbox"/>            |
| Department                      | sales  | Flow User                         | <input type="checkbox"/>            |
| Division                        |  | Service Cloud User                | <input type="checkbox"/>            |
| Address                         | 90/1, Vasantha Nagar, Suramangalam<br>Salem 636005<br>Tamilnadu<br>India | Site.com Contributor User         | <input type="checkbox"/>            |
| Time Zone                       | (GMT+05:30) India Standard Time (Asia/Kolkata)                           | Site.com Publisher User           | <input type="checkbox"/>            |
| Locale                          | English (India)  | WDC User                          | <input type="checkbox"/>            |
| Language                        | English  | Mobile Push Registrations         | <input type="checkbox"/>            |
| Delegated Approver              |  | Data.com User Type                | <input type="checkbox"/>            |
| Manager                         |  | Accessibility Mode (Classic Only) | <input type="checkbox"/>            |
| Receive Approval Request Emails | Only if I am an approver   | Debug Mode                        | <input type="checkbox"/>            |

The bottom of the screen shows a Windows taskbar with various application icons and system status indicators.

Welcome to Salesforce: Verify your account

support@salesforce.com <support@salesforce.com>

10:16 AM (0 minutes ago)

Welcome to Salesforce!

Click below to verify your account.

Verify Account

To easily log in later, save this URL:  
<https://kiot-4b-dev-ed.my.salesforce.com>

Username:  
2k20cse@kiot.ac.in

Again, welcome to Salesforce!

Change Your Password

Enter a new password for 2k20cse@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 03/10/2023, 10:16 am.

Screenshot of a web browser showing the Salesforce Lightning interface.

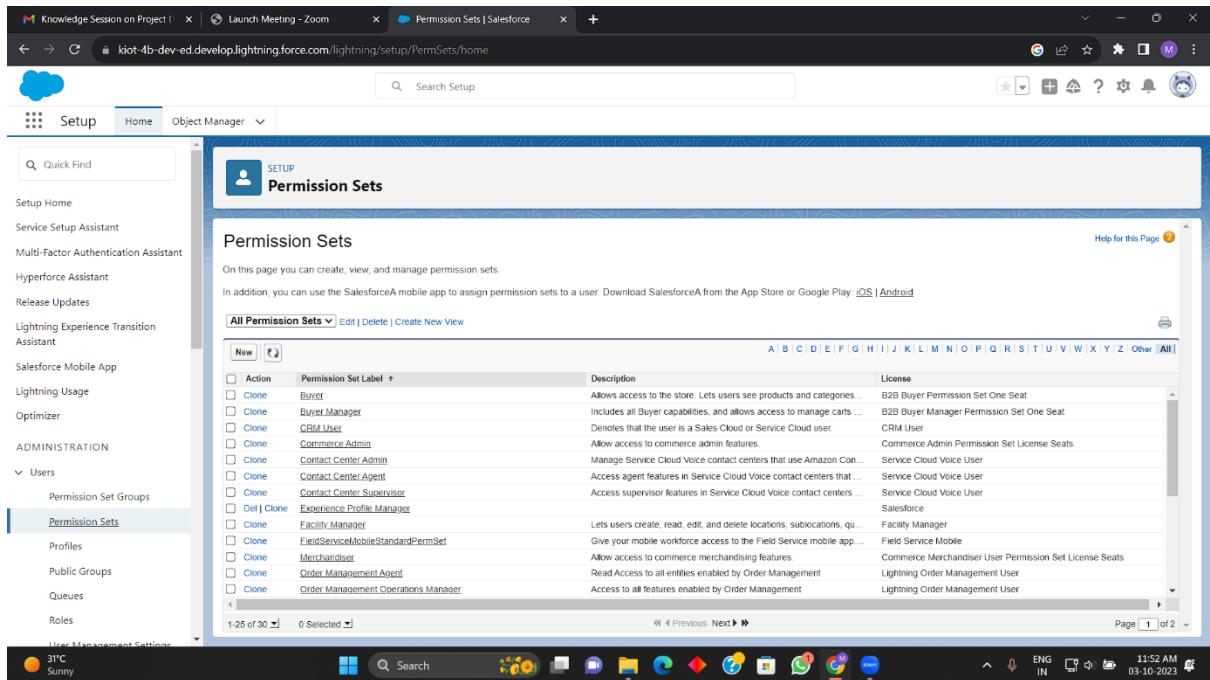
The top navigation bar includes tabs for "Users | Salesforce", "Welcome to Salesforce: Verify your...", "Recently Viewed | Accounts | Sale...", "Profiles | Salesforce", and "Post Attendee - Zoom".

The URL in the address bar is `kiot-4b-dev-ed.lightning.force.com/lightning/o/Account/list?filterName=Recent`.

The main content area displays the "Recently Viewed" account list. The header shows columns for "Account Name", "Account Site", "Phone", and "Account Owner Alias". A message indicates "You haven't viewed any Accounts recently. Try switching list views.".

The bottom navigation bar includes tabs for "Reports | Salesforce" and "Post Attendee - Zoom".

The desktop taskbar at the bottom shows various application icons and the system tray with the date and time (03-10-2023, 10:25 AM).



## Step 2:

### Permission Sets:

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

### Object-Level Security:

- In each profile and permission set, set the object-level security for the Account object to

"Read" to ensure that both User A and User B can view Account records.

### Record-Level Security:

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

### Ownership:

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

### Organization-Wide Defaults:

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

### Testing:

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

The screenshot shows the Salesforce 'Permission Sets' page. The left sidebar is titled 'Setup' and includes sections for Service Setup Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, and Administration. Under 'Administration', there are sections for Users, Permission Set Groups, and Permission Sets. The 'Permission Sets' section is currently selected. The main content area is titled 'Permission Sets' and contains a table with the following data:

| 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...    | 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 Seats             |
| <input type="checkbox"/> | Contact Center Admin                | Manage Service Cloud Voice contact centers that use Amazon Con...        | Service Cloud Voice User                                |
| <input type="checkbox"/> | Contact Center Agent                | Access agent features in Service Cloud Voice contact centers that...     | Service Cloud Voice User                                |
| <input type="checkbox"/> | Contact Center Supervisor           | Access supervisor features in Service Cloud Voice contact centers ...    | Service Cloud Voice User                                |
| <input type="checkbox"/> | Defl Clone                          | Experience Profile Manager   | Salesforce  |
| <input type="checkbox"/> | Facility Manager                    | Lets users create, read, edit, and delete locations, sublocations, qu... | Facility Manager  |
| <input type="checkbox"/> | FieldServiceMobileStandardPermSet   | Give your mobile workforce access to the Field Service mobile app...     | Field Service Mobile                                    |
| <input type="checkbox"/> | Merchandiser                        | Allow access to commerce merchandising features.                         | Commerce Merchandiser User Permission Set License Seats |
| <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                         |

At the bottom of the page, there are navigation links for 'All Permission Sets', 'Edit | Delete | Create New View', and a search bar. The status bar at the bottom right shows '11:52 AM 03-10-2023'.

The screenshot shows the Salesforce Setup interface with the 'Permission Sets' page open. The left sidebar is titled 'SETUP' and includes sections for 'Setup Home', 'Service Setup Assistant', 'Multi-Factor Authentication Assistant', 'Hyperforce Assistant', 'Release Updates', 'Lightning Experience Transition Assistant', 'Salesforce Mobile App', 'Lightning Usage', 'Optimizer', and 'ADMINISTRATION'. Under 'ADMINISTRATION', the 'Users' section is expanded, showing 'Permission Set Groups', 'Permission Sets' (which is selected), 'Profiles', 'Public Groups', 'Queues', and 'Roles'. The main content area is titled 'Permission Sets Create' and contains a form for creating a new permission set. The 'Enter permission set information' section requires a 'Label' (set to 'salesmanager') and an 'API Name' (set to 'SalesManager'). 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 asks 'Who will use this permission set?'. It provides three options: '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.', and 'Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.' A note below says 'Not sure what a permission set license is? Learn more here.' The 'License' dropdown is set to 'None'. At the bottom of the form are 'Save' and 'Cancel' buttons.

The screenshot shows the Salesforce Setup interface with the 'Permission Sets' tab selected. A specific permission set named 'salesmanager' is displayed. The 'Permission Set Overview' section shows the API Name as 'salesmanager', Namespace Prefix as 'Madheswaran\_V\_L', and the last modified by user as 'Madheswaran\_V\_L' on '03/10/2023, 11:53 am'. The 'Apps' section lists various app-related permissions like Assigned Apps, Assigned Connected Apps, Object Settings, App Permissions, Apex Class Access, Visualforce Page Access, and External Data Source Access.

**Permission Set Overview**

| API Name     | Namespace Prefix | Created By                           |
|--------------|------------------|--------------------------------------|
| salesmanager | Madheswaran_V_L  | Madheswaran_V_L 03/10/2023, 11:53 am |

**Apps**

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

The screenshot shows the same Salesforce setup interface, but the 'Object Settings' tab is now active under the 'Object Settings' section of the permission set. This view displays a table of object names, their current access level (e.g., No Access), the total number of fields, and tab settings. Objects listed include Accounts, AI Insight Reasons, AI Record Insights, Alternative Payment Methods, API Anomaly Event Stores, App Analytics Query Requests, Application Usage Assignments, Appointment Categories, Appointment Invitations, Appointment Invites, Appointment Schedule Aggregates, Appointment Schedule Logs, Appointment Topic Time Slots, Asset Actions, Asset Action Sources, and Asset Relationships.

| 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 Invites             | --                 | 4            | --           |
| Appointment Schedule Aggregates | No Access          | --           | --           |
| Appointment Schedule Logs       | No Access          | --           | --           |
| Appointment Topic Time Slots    | No Access          | 6            | --           |
| Asset Actions                   | No Access          | 30           | --           |
| Asset Action Sources            | No Access          | 18           | --           |
| Asset Relationships             | --                 | 10           | --           |

**Permission Set**  
**salesmanager**

**Object Permissions**

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

**Field Permissions**

| Field Name   | Read Access              | Edit Access                         |
|--------------|--------------------------|-------------------------------------|
| College code | <input type="checkbox"/> | <input checked="" type="checkbox"/> |

The screenshot shows the Salesforce Setup interface. The left sidebar is titled "Setup" and includes sections for 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", "Permission Set Groups" is expanded, showing "Permission Sets" selected. The main content area is titled "salesmanager" and "PERMISSION SET 'SALESMANAGER'". It displays a section titled "Current Assignments" with a "No assignments defined." message and a decorative cactus and clouds illustration.

**Current Assignments**

No assignments defined.

The screenshot shows the "Select Users to Assign" page for the "salesmanager" permission set. The left sidebar is identical to the first screenshot. The main content area is titled "salesmanager" and "PERMISSION SET 'SALESMANAGER' > MANAGE ASSIGNMENT EXPIRATION". It displays a table titled "All Users" with the following data:

| Full Name         | Alias   | Username  | Role                                | Profile                          |
|-------------------|---------|---|-------------------------------------|----------------------------------|
| Chatter Expert    | Chatter | chatty.00d5j00000cirmtea3.tugnvnvo3tjh@chatter.salesforce.com | <input checked="" type="checkbox"/> | Chatter Free User                |
| Integration User  | integ   | integration@00d5j00000cirmtea3.com                            | <input checked="" type="checkbox"/> | Analytics Cloud Integration User |
| Laksh V           | lv      | 2k20cse@kiot.ac.in  | <input checked="" type="checkbox"/> | salesmanager                     |
| Madheswaran V L   | MV L    | venkat@student.com  | <input checked="" type="checkbox"/> | System Administrator             |
| Madheswaran22 V L | mv l    | mww123@gmail.com  | <input checked="" type="checkbox"/> | Madhes                           |

**Select Users to Assign**

All Users

1 item selected

Search this list...

Cancel Next

The screenshot shows two consecutive screenshots of the Salesforce Setup interface, likely from a browser window.

**Screenshot 1: Select an Expiration Option For Assigned Users**

This screen is titled "PERMISSION SET 'SALESMANAGER' > MANAGE ASSIGNMENT EXPIRATION". It shows a list of users assigned to the "salesmanager" permission set. The user "Laksh V" is selected. The "Expires On" field is set to "Never Expires".

| Full Name | Role | Profile      | Active | User License        | Expires On    |
|-----------|------|--------------|--------|---------------------|---------------|
| Laksh V   |      | salesmanager | ✓      | Salesforce Platform | Never Expires |

**Screenshot 2: Assignment Summary**

This screen shows a summary of the assignment. A green success message indicates "1 assignments were successful." The assignment details are listed in a table:

| Full Name | User License        | Expires On | Time Zone | Status  |
|-----------|---------------------|------------|-----------|---------|
| Laksh V   | Salesforce Platform |            |           | Success |

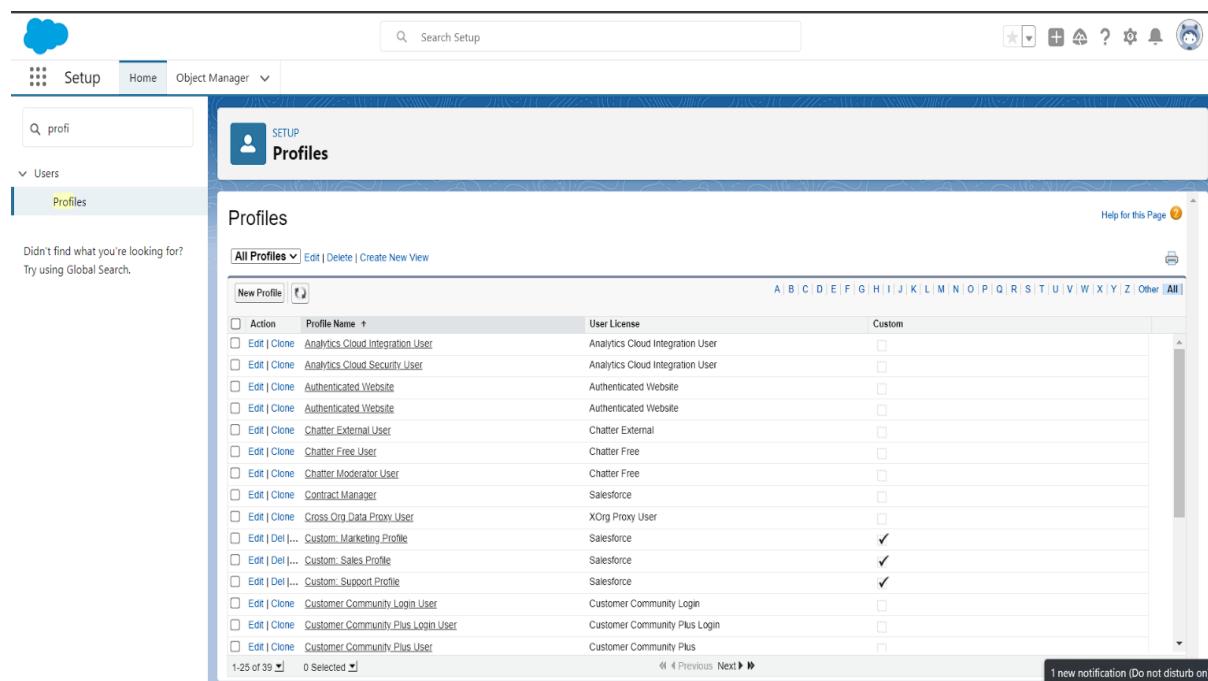
A "Done" button is visible at the bottom right of the summary screen.

**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]

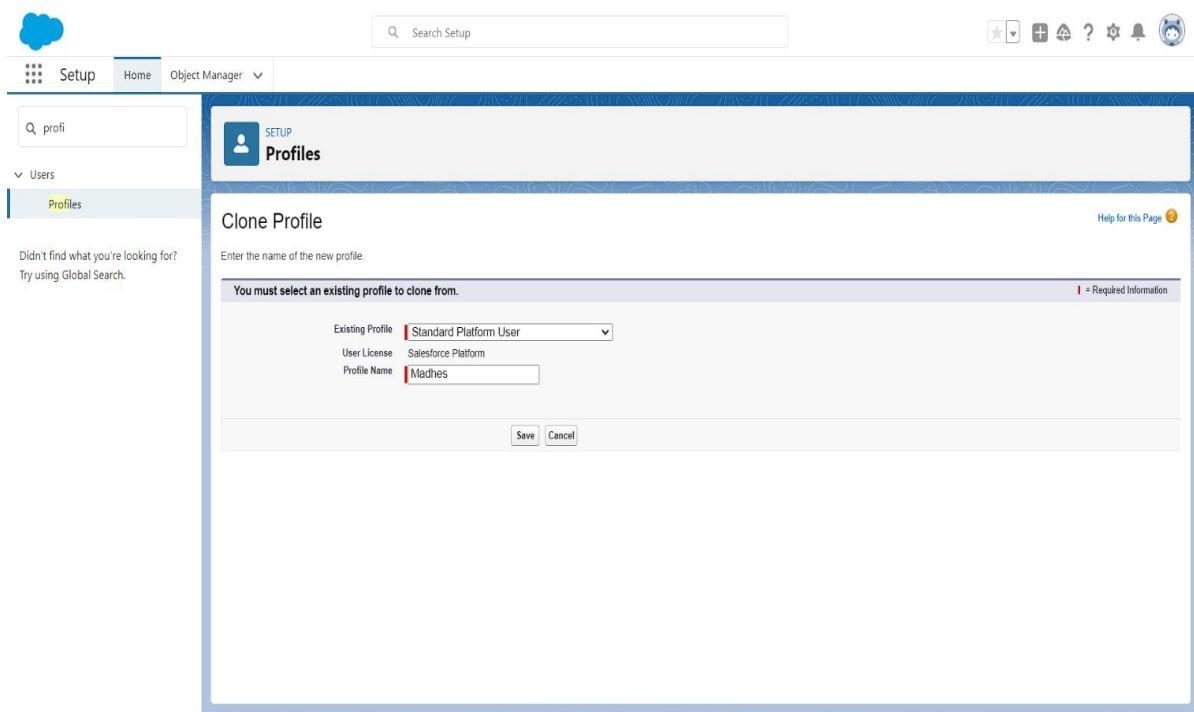


The screenshot shows the Salesforce Setup interface with the following details:

- Header:** Search bar with "Search Setup", a gear icon, and other navigation links.
- Left Sidebar:** "Setup" icon, "Home" link, "Object Manager" dropdown, "Users" section, and "Profiles" section (which is selected).
- Message Bar:** "Didn't find what you're looking for? Try using Global Search."
- Page Header:** "SETUP" and "Profiles".
- Page Content:** "Profiles" section with a table.
  - Table Headers:** "Action", "Profile Name", "User License", and "Custom".
  - Table Data:** A list of profiles with their names and user licenses. Some profiles have checkboxes in the "Action" column, while others have edit/clone links.
  - Table Footer:** "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 Bottom:** "1 new notification (Do not disturb on)".

## 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 Madhes 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 with the 'Profiles' page selected. The profile 'Madhes' is displayed, which includes a list of permissions and page layouts assigned to users with this profile.

**Profile Detail:**

| Name        | Madhes                               | User License | Salesforce Platform | Custom Profile | <input checked="" type="checkbox"/> |                                      |
|-------------|--------------------------------------|--------------|---------------------|----------------|-------------------------------------|--------------------------------------|
| Description |                                      |              |                     |                |                                     |                                      |
| Created By  | Madheswaran V L 02/10/2023, 12:59 pm |              |                     |                | Modified By                         | Madheswaran V L 02/10/2023, 12:59 pm |

**Page Layouts:**

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

The screenshot shows the Salesforce Setup interface with the 'Profiles' page selected. The profile 'Profi' is displayed, which includes a list of background operations, custom object permissions, session settings, and password policies.

**Background Operations:**

| Background Operations                    | Documents                           |
|--|-------------------------------------|
| Business Brands                          | <input checked="" type="checkbox"/> |
| Communication Subscriptions              | <input checked="" type="checkbox"/> |
| Communication Subscription Channel Types | <input checked="" type="checkbox"/> |
| Communication Subscription Consents      | <input checked="" type="checkbox"/> |
| Communication Subscription Timings       | <input checked="" type="checkbox"/> |
| Contacts                                 | <input checked="" type="checkbox"/> |
| Contact Point Addresses                  | <input type="checkbox"/>            |
| Contact Point Consents                   | <input checked="" type="checkbox"/> |
| Contact Point Emails                     | <input checked="" type="checkbox"/> |

**Custom Object Permissions:**

| Student table | Basic Access             |                          |                          |                          |                          |                          | Data Administration      |                          |                          |                          |                          |            |
|---------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|------------|
|               | Read                     | Create                   | Edit                     | Delete                   | View All                 | Modify All               | Read                     | Create                   | Edit                     | Delete                   | View All                 | Modify All |
|               | <input type="checkbox"/> |            |

**Session Settings:**

| Session Times Out After | 2 hours of inactivity | Session Security Level Required at Login |
|-------------------------|-----------------------|--|
|-------------------------|-----------------------|--|

**Password Policies:**

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

The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected. A search bar at the top left contains 'profi'. The main content area displays the 'Profile Edit' screen for the profile 'Madhes'. The profile details are as follows:

| Name         | Value               |
|--------------|---------------------|
| Name         | Madhes              |
| User License | Salesforce Platform |
| Description  | (empty)             |

Under 'Custom Profile', there is a checked checkbox. Below this, under 'Custom App Settings', there are two sections:

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

Below these settings are sections for 'Service Provider Access', 'Tab Settings', and 'Standard Tab Settings'.

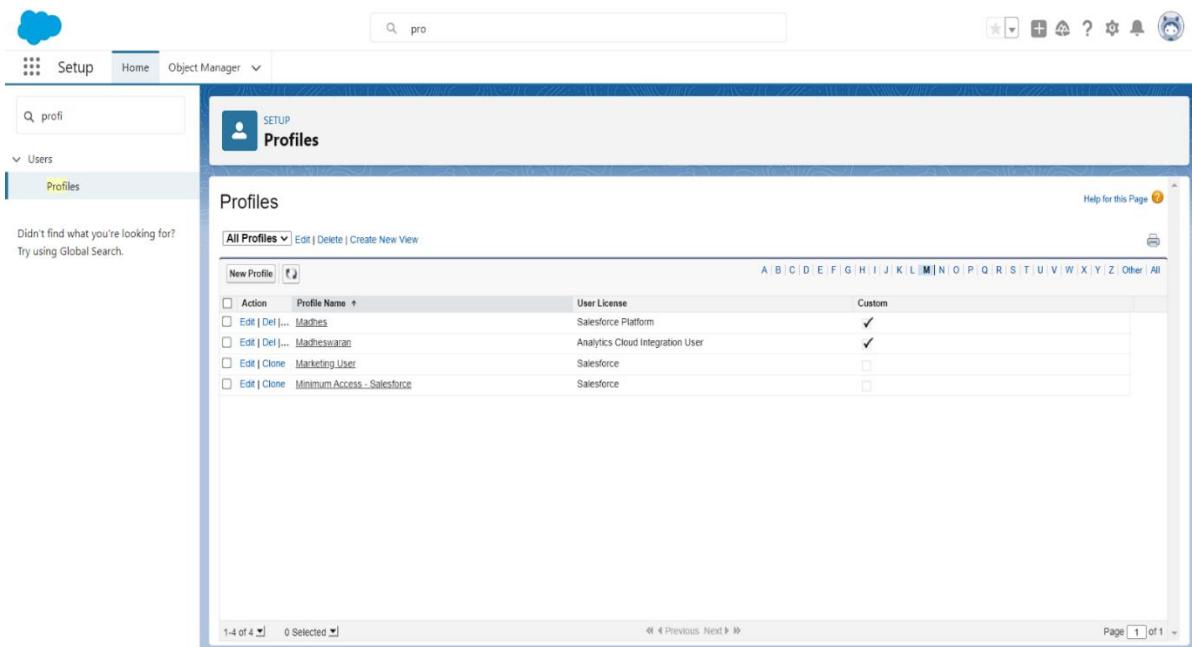
The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected. A search bar at the top left contains 'pro'. The main content area displays the 'Profiles' list screen. The table header includes columns for 'Action', 'Profile Name', 'User License', and 'Custom'. The data in the table is as follows:

| Action                   | Profile Name                | User License                     | Custom                              |
|--------------------------|-----------------------------|----------------------------------|-------------------------------------|
| <input type="checkbox"/> | Madhes                      | Salesforce Platform              | <input checked="" type="checkbox"/> |
| <input type="checkbox"/> | Madheswaran                 | Analytics Cloud Integration User | <input checked="" type="checkbox"/> |
| <input type="checkbox"/> | Marketing User              | Salesforce                       | <input type="checkbox"/>            |
| <input type="checkbox"/> | Minimum Access - Salesforce | Salesforce                       | <input type="checkbox"/>            |

At the bottom of the screen, there are pagination controls: '1-4 of 4' and '0 Selected'. There are also navigation links for 'Previous' and 'Next' pages, and a page number indicator 'Page 1 of 1'.

## Step 4

Now you can preview your created profile on the profile option here my profile name madhes 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 top navigation bar includes 'Setup', 'Home', 'Object Manager', and a search bar with the term 'pro'. On the left, a sidebar shows 'Users' and 'Profiles' under 'Users'. The main content area is titled 'Profiles' and displays a table of profiles. The table columns are 'Action', 'Profile Name', 'User License', and 'Custom'. The data rows are:

| Action                                  | Profile Name                | User License                     | Custom                              |
|---|-----------------------------|----------------------------------|-------------------------------------|
| <input type="checkbox"/> Edit   Del ... | Madhes                      | Salesforce Platform              | <input checked="" type="checkbox"/> |
| <input type="checkbox"/> Edit   Del ... | Madheswaran                 | Analytics Cloud Integration User | <input checked="" type="checkbox"/> |
| <input type="checkbox"/> Edit   Clone   | Marketing User              | Salesforce                       | <input type="checkbox"/>            |
| <input type="checkbox"/> Edit   Clone   | Minimum Access - Salesforce | Salesforce                       | <input type="checkbox"/>            |

At the bottom, there are pagination controls '1-4 of 4' and '0 Selected', and a page number 'Page 1 of 1'.

## 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 Madhes which we have created on the step 2.once the one user has been created click on the save & new so that you can create the second user and there the user name can been created with alternate name but with the same user

profile and once the two user are create click on save.

| Action                          | Full Name        | Alias   | Username  | Role | Active | Profile                          |
|---------------------------------|------------------|---------|---|------|--------|----------------------------------|
| <input type="checkbox"/>   Edit | Chatter Expert   | Chatter | chatty@00d500000cirmea3.tougnmvo3lhn@chatter.salesforce.com |      | ✓      | Chatter Free User                |
| <input type="checkbox"/>   Edit | User_Integration | integ   | integration@00d500000cirmea3.com                            |      | ✓      | Analytics Cloud Integration User |
| <input type="checkbox"/>   Edit | User_Security    | sec     | insightsecurity@00d500000cirmea3.com                        |      | ✓      | Analytics Cloud Security User    |
| <input type="checkbox"/>   Edit | V.L. Madheswaran | MV_L    | venkat@student.com  |      | ✓      | System Administrator             |

| Action                              | Full Name         | Alias   | Username  | Role                   | Active                              | Profile                          |
|-------------------------------------|-------------------|---------|---|------------------------|-------------------------------------|----------------------------------|
| <input type="checkbox"/>            | Chatter Expert    | Chatter | chaty.00d5000000icimteaa3.tugnmvo3tmhi@chatter.salesforce.com |                        | <input checked="" type="checkbox"/> | Chatter Free User                |
| <input type="checkbox"/>            | User Integration  | integ   | integration@00d5000000icimteaa3.com                           |                        | <input checked="" type="checkbox"/> | Analytics Cloud Integration User |
| <input type="checkbox"/>            | User Security     | sec     | insightssecurity@00d5000000icimteaa3.com                      |                        | <input checked="" type="checkbox"/> | Analytics Cloud Security User    |
| <input checked="" type="checkbox"/> | V.L_Madheswaran   | MV.L    | venkat@student.com  | System Administrator   | <input checked="" type="checkbox"/> | System Administrator             |
| <input checked="" type="checkbox"/> | V.L_Madheswaran22 | MV.I    | mwi123@gmail.com  | Director Channel Sales | <input checked="" type="checkbox"/> | Madhes                           |

Now you can preview your two user that you have created in my side I had create the two users a Madheswaran and Madheswaran22 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.

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

Enter permission set information

Label: permission2

API Name: permission2

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--

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

- Header:** Includes a cloud icon, "Setup", "Home", "Object Manager", a search bar ("Search Setup"), and various navigation icons.
- Left Sidebar (ADMINISTRATION):**
  - Users
    - Permission Set Groups
    - Permission Sets (selected)
    - Profiles
    - Public Groups
    - Queues
    - Roles
  - User Management Settings
  - Users
    - Data
    - Email
  - PLATFORM TOOLS
    - Subscription Management
    - Apps
    - Feature Settings
    - Slack
    - MuleSoft
- Central Content:**

## SETUP Permission Sets

### Permission Set permission2

API Name: permission2  
Namespace Prefix:  
Created By: Madheswaran V L 02/10/2023, 1:19 pm

#### Permission Set Overview

| Description | License | Session Activation Required | Last Modified By                    |
|-------------|---------|-----------------------------|-------------------------------------|
|             |         |                             | Madheswaran V L 02/10/2023, 1:19 pm |

#### 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**

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

- Header:** Includes a cloud icon, "Setup", "Home", "Object Manager", a search bar ("Search Setup"), and various navigation icons.
- Left Sidebar (ADMINISTRATION):**
  - Users
    - Permission Set Groups
    - Permission Sets (selected)
    - Profiles
    - Public Groups
    - Queues
    - Roles
  - User Management Settings
  - Users
    - Data
    - Email
  - PLATFORM TOOLS
    - Subscription Management
    - Apps
    - Feature Settings
    - Slack
    - MuleSoft
- Central Content:**

## SETUP Permission Sets

### Permission Set permission2

API Name: permission2  
Namespace Prefix:  
Created By: Madheswaran V L 02/10/2023, 1:19 pm

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 Invites             | --                 | 4            | --           |
| Appointment Schedule Aggregates | No Access          | --           | --           |
| Appointment Schedule Logs       | No Access          | --           | --           |
| Appointment Topic Time Slots    | No Access          | 6            | --           |
| Asset Actions                   | No Access          | 30           | --           |
| Asset Action Sources            | No Access          | 18           | --           |
| Asset Relationships             | --                 | 10           | --           |

## 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 screenshot shows the Salesforce Setup interface. The left sidebar is titled "Setup" and includes sections for Lightning Usage, Optimizer, Administration (Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, Users), Data (Data, Email), and Platform Tools (Subscription Management, Apps, Feature Settings, Slack). The "Permission Sets" section is currently selected. The main content area is titled "Permission Sets" and shows a list of permission sets. One permission set, "permission2", is selected and displayed in detail. The "Object Permissions" section for "Accounts" shows the following configuration:

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

The "Field Permissions" section for "Account" shows the following configuration:

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

The screenshot shows the Salesforce Setup interface. The left sidebar is titled 'Setup' and includes sections for Administration (Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, Users), Data (Email), and Platform Tools (Subscription Management, Apps, Feature Settings, Slack, MuleSoft). The main content area is titled 'Permission Sets' and shows a permission set named 'permission2'. It includes tabs for 'Object Permissions' and 'Field Permissions'. Under 'Object Permissions' for 'Accounts', the following permissions are listed:

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

Under 'Field Permissions' for 'Account', the following access levels are defined:

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

## Step 8:

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

The screenshot shows the 'Current Assignments' page for the 'permission2' permission set. The sidebar is identical to the previous screenshot. The main content area shows a decorative illustration of a cactus, clouds, and a sun. Below the illustration, the text 'No assignments defined.' is displayed.

The screenshot shows the Salesforce Setup interface. The left sidebar is titled 'Setup' and includes sections for Lightning Usage, Optimizer, ADMINISTRATION (with 'Users' expanded), Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and Users. The main content area is titled 'permission2' and shows the 'Select Users to Assign' dialog. The dialog title is 'All Users'. It displays two items: 'Madheswaran V L' (Full Name: MV L, Alias: venkat@student.com, Role: System Administrator) and 'Madheswaran22 V L' (Full Name: mv l, Alias: mww123@gmail.com, Role: Director, Channel Sales). Both users have their checkboxes checked. A search bar at the top right contains 'Madheswaran'. At the bottom right of the dialog are 'Cancel' and 'Next' buttons.

This screenshot is identical to the one above, but it shows only one user selected: 'Madheswaran22 V L' (Full Name: mv l, Alias: mww123@gmail.com, Role: Director, Channel Sales). The checkbox next to its name is checked. The other user's checkbox is unchecked. The rest of the interface, including the sidebar and the dialog header, remains the same.

Click on next.

The screenshot shows the Salesforce Setup interface. On the left, the navigation sidebar includes sections like Lightning Usage, Optimizer, Administration, Users, Data, Email, and Platform Tools. Under Users, the 'Permission Set Groups' section is expanded, showing options like Profiles, Public Groups, Queues, Roles, User Management Settings, and Users. The main content area displays a configuration screen for assigning a permission set. It has two radio button options: 'No expiration date' (selected) and 'Specify the expiration date'. Below this are buttons for '1 Day', '1 Week', '30 Days', '60 Days', and 'Custom Date'. A 'Time Zone' dropdown is labeled 'Select a time zone...'. A table titled 'Selected Users' lists one user: 'Madheswaran22 V L' (Role: Director, Channel Sales, Profile: Madhes, Active: checked, User License: Salesforce Platform, Expires On: Never Expires). At the bottom are 'Cancel', 'Back', and 'Assign' buttons.

Now click on Assign.

The screenshot shows the Salesforce Setup interface after the assignment has been completed. The main content area displays a 'PERMISSION SET 'PERMISSION2' > MANAGE ASSIGNMENTS' page. The title bar says 'permission2'. Below it is an 'Assignment Summary' table. The table has columns: Full Name, User License, Expires On, Time Zone, and Status. It shows one row for 'Madheswaran22 V L' with 'Salesforce Platform' as the User License, 'Never Expires' as the Expires On date, 'Select a time zone...' as the Time Zone, and 'Success' as the Status. There is a 'Done' button at the bottom right of the summary table.

Now the specific access for the Madheswaran22 user has been assigned successfully.



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

Solution:

Step 1: Create a Custom Object

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

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

The screenshot shows the Salesforce Object Manager interface. At the top, there's a breadcrumb trail: SETUP > OBJECT MANAGER. Below it, the page title is "Survey Result". On the left, a sidebar lists various setup categories like Page Layouts, Lightning Record Pages, Buttons, etc. The main content area has a header "Fields & Relationships" with a "Quick Find" search bar and buttons for "New", "Deleted Fields", "Field Dependencies", and "Set History Tracking". A table lists the fields for the "Survey Result" object. The columns are: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are: Comment (Comment\_\_c, Text Area(255)), Created By (CreatedById, Lookup(User)), Email (Email\_\_c, Email), Last Modified By (LastModifiedById, Lookup(User)), Name (Name\_\_c, Text(51)), Owner (OwnerId, Lookup(User,Group)), Rating (Rating\_\_c, Picklist), and Survey Result Name (Name, Auto Number). The "Owner" field is marked with a checkmark in the "Controlling Field" column, and the "Survey Result Name" field is marked with a checkmark in the "Indexed" column.

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

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

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

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

**Details Tab:**

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

**Message Content Tab:**

- Subject: Thank You For Completing Our Survey!
- Enhanced Letterhead: (empty)
- HTML Value:

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

## 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

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 <small>i</small>   |                      |                     |   |                    |   |                                    |  |                                       |
| Object  | Survey Result   |                      |                     |   |                    |   |                                    |  |                                       |
| Email Template  | Thank You Email - Survey <small>o</small>   |                      |                     |   |                    |   |                                    |  |                                       |
| Protected Component   | <input type="checkbox"/>  |                      |                     |   |                    |   |                                    |  |                                       |
| Recipient Type  | Search: User <input type="text"/> for: <input type="button" value="Find"/>  |                      |                     |   |                    |   |                                    |  |                                       |
| Recipients  | <table border="1"> <tr> <th>Available Recipients</th> <th>Selected Recipients</th> </tr> <tr> <td>User: Integration User<br/>User: Rakesh Gupta<br/>User: Security User</td> <td>Email Field: Email</td> </tr> <tr> <td>Add <input type="button" value="&gt;"/></td> <td><input type="button" value="Add"/></td> </tr> <tr> <td>Remove <input type="button" value="&lt;"/></td> <td><input type="button" value="Remove"/></td> </tr> </table> | Available Recipients | Selected Recipients | User: Integration User<br>User: Rakesh Gupta<br>User: Security User | Email Field: Email | Add <input type="button" value="&gt;"/> | <input type="button" value="Add"/> | Remove <input type="button" value="&lt;"/> | <input type="button" value="Remove"/> |
| Available Recipients  | Selected Recipients   |                      |                     |   |                    |   |                                    |  |                                       |
| User: Integration User<br>User: Rakesh Gupta<br>User: Security User | Email Field: Email  |                      |                     |   |                    |   |                                    |  |                                       |
| Add <input type="button" value="&gt;"/>                             | <input type="button" value="Add"/>  |                      |                     |   |                    |   |                                    |  |                                       |
| Remove <input type="button" value="&lt;"/>                          | <input type="button" value="Remove"/>   |                      |                     |   |                    |   |                                    |  |                                       |

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

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

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

- 1.Drag-and-drop the **Create Records** element onto the Flow designer.
- 2.Enter a name in the **Label (Save Response)** field; the **API Name** will auto-populate.
- 3.For **How Many Records to Create** – select **One**.
- 4.For **How to Set the Record Fields** – select **Use separate resources, and literal values**.
- 5.Select the **Survey\_Result\_\_c** object from the dropdown list.
- 6.**Set Field Values for the Survey Result**
  - 1.Row 1:
    - 1.**Field:** **Comment\_\_c**
    - 2.**Value:** **{!Comment}**
  - 2.Click **Add Row**
  - 3.Row 2:
    - 1.**Field:** **Email\_\_c**
    - 2.**Value:** **{!Email.value}**
  - 4.Click **Add Row**
  - 5.Row 3:
    - 1.**Field:** **Name\_\_c**
    - 2.**Value:** **{!Name.firstName}**  
**{!Name.lastName}**
  - 6.Click **Add Row**
  - 7.Row 3:

- 1. Field: Rating\_\_c**
- 2. Value: {!Rating}**

## 7. Click Done.

Edit Create Records

Create Salesforce records using values from the flow.

|                          |                             |
|--------------------------|-----------------------------|
| * Label<br>Save Response | * API Name<br>Save_Response |
| Description              |                             |
| <input type="text"/>     |                             |

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

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

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

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

## 4. Clicks on the Survey – Thank You Email email alert.

### 5. Click Done.

Edit "Survey - Thank You Email" email alert

---

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

\* Label                                  \* API Name

Send Thank You Email                      Send\_Thank\_You\_Email

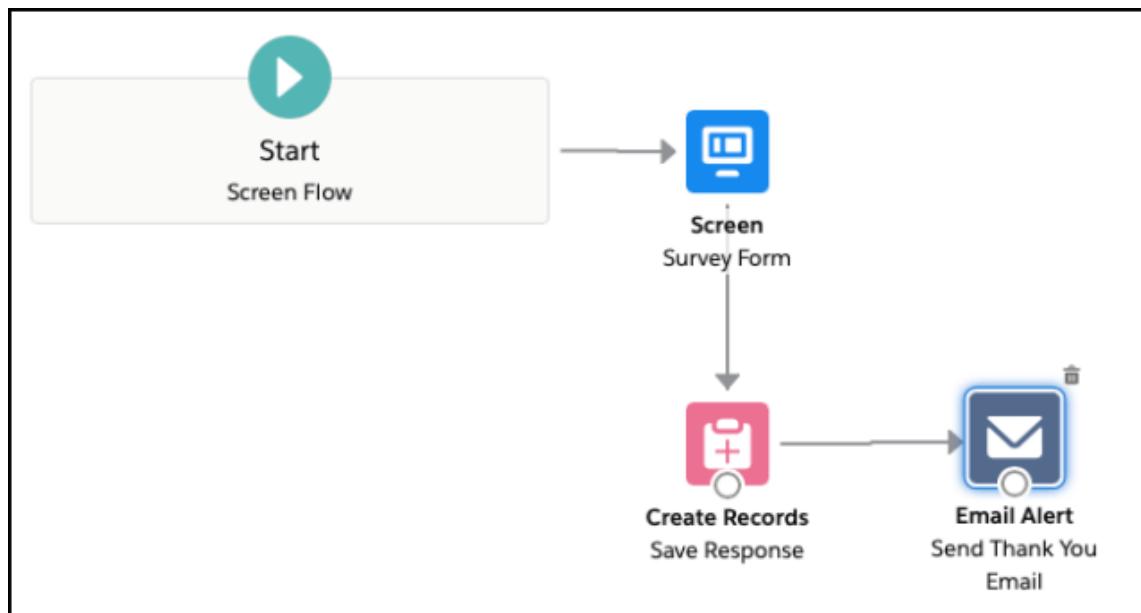
Description

Set Input Values

A<sub>a</sub> \* Record ID  
(!Save\_Response)

Cancel                                  Done

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



1. Click **Save**.
2. Enter **Flow Label** the **API Name** will auto-populate.
3. Click **Show Advanced**.
4. **How to Run the Flow: User or System Context—Depends on How Flow is Launched**
5. **Type: Screen Flow**
6. **API Version for Running the Flow: 51**
7. **Interview Label: Survey**  
`{!$Flow.CurrentDateTime}`
8. Click **Save**.

Save as

---

A New Version    A New Flow

\* Flow Label                          \* Flow API Name

Survey                                 Survey

Description

Hide Advanced

How to Run the Flow i

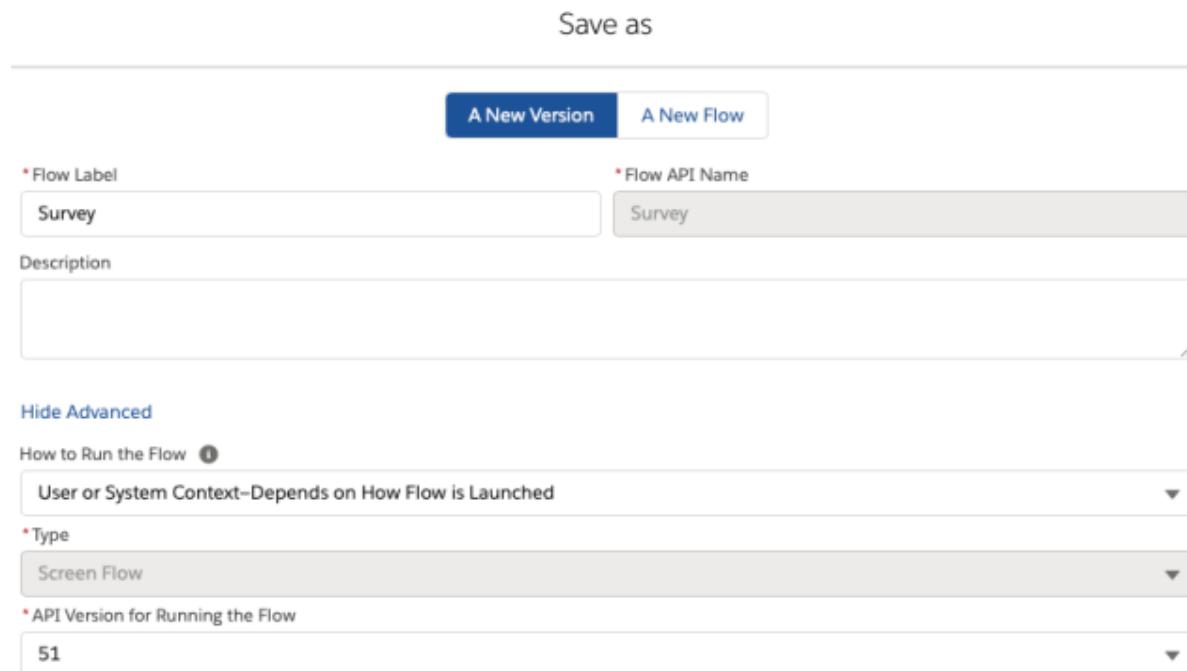
User or System Context—Depends on How Flow is Launched

\* Type

Screen Flow

\* API Version for Running the Flow

51



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

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

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

The screenshot shows the Salesforce IDE interface. The top menu bar includes File, Edit, Debug, Test, Workspace, Help, and navigation icons. A tab labeled "VFPageToLC.app \*" is active. The main editor area contains the following code:

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

The code defines a Lightning Application component named "VFPageToLC.app". It specifies global access, extends the "ltng:outApp" base component, and implements the "ltng:allowGuestAccess" interface. It also declares a dependency on the "lightning:flow" component.

## 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, there's a header with 'Visualforce Page Survey'. Below it is a 'Page Edit' toolbar with buttons for 'Save', 'Quick Save', 'Cancel', 'Where is this used?', 'Component Reference', and 'Preview'. A note 'I = Required Information' is present. The main area has a 'Page Information' section where 'Label' and 'Name' are set to 'Survey', and a 'Description' field is empty. Under 'Available for Lightning Experience, Experience Builder sites, and the mobile app', the checkbox is checked. Under 'Require CSRF protection on GET requests', the checkbox is unchecked. Below this is a 'Visualforce Markup' tab which contains the following code:

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

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

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

1. Click **Setup**.

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

**Site Edit**

**Save**   **Cancel**

|                         |  |   |
|-------------------------|--|---|
| Site Label              | Survey   | <a href="#">i</a>                           |
| Site Name               | Survey   | <a href="#">i</a>                           |
| Site Description        |  |   |
| Site Contact            | Rakesh Gupta   | <a href="#">i</a> <a href="#">e</a>         |
| Default Record Owner    | Rakesh Gupta   | <a href="#">i</a> <a href="#">e</a>         |
| Default Web Address     | http://katihar-developer-edition.gus.force.com/ survey |   |
| Active                  | <input checked="" type="checkbox"/>                    | <a href="#">i</a>                           |
| Active Site Home Page   | Survey   | <a href="#">i</a> <a href="#">[Preview]</a> |
| Inactive Site Home Page | InMaintenance  | <a href="#">i</a> <a href="#">[Preview]</a> |
| Site Template           | SiteTemplate   | <a href="#">i</a> <a href="#">e</a>         |

Under site, **Public Access Settings** make sure that guest users have **Create** access on **Survey Result** object and **Edit** on the **fields**.

## Proof of Concept

Now onward, if someone opens the site url and fills the form:

## Survey

Name

First Name

Alok

Last Name

Sinfal

\*Email

\*Rating

5 

\*Comment

Awesome Blog



Next

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

Thank You For Completing Our Survey!     

 Survey Site Guest User via bj9amq6fe7r.b-cdzwmaa.gs0.bnc.salesforce.com  
to me 

8:09 PM (1 minute ago)   

Hi Alok Sinfal,

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

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

Thanks,  
Automation Champion