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Salesforce
Developer(Course)
Assignment no 1

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

Solution:

Step 1: Create Custom Objects

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

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

- Header:** Includes the Salesforce logo, a search bar labeled "Search Setup", and various navigation icons.
- Breadcrumbs:** Shows "Setup" > "Object Manager".
- Section:** "New Custom Object" under "SETUP".
- Message Bar:** A yellow bar at the top states: "Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more!](#) [Don't show this message again](#)".
- Custom Object Definition Edit:** A tab-based form with the following sections:
 - Custom Object Information:** Fields include "Label" (college), "Plural Label" (colleges), and "Example: Account". A note says "The singular and plural labels are used in tabs, page layouts, and reports." There is also a checkbox for "Starts with vowel sound".
 - Description:** A large text area for describing the object.
 - Context-Sensitive Help Setting:** Radio buttons for "Open the standard Salesforce.com Help & Training window" (selected) and "Open a window using a Visualforce page".
 - Content Name:** A dropdown menu set to "None".
 - Enter Record Name Label and Format:** Fields for "Record Name" (college Name) and "Example: Account Name". A note says "The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API." Data type is set to "Text".
 - Optional Features:** A list of checkboxes for "Allow Reports", "Allow Activities", "Track Field History", "Allow in Chatter Groups", and "Enable Licensing".
 - Object Classification:** A note stating "When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object." Options include "Allow Sharing", "Allow Bulk API Access", and "Allow Streaming API Access".
 - Deployment Status:** Radio buttons for "In Development" (unchecked) and "Deployed" (checked).
 - Search Status:** A note stating "When this setting is enabled, your users can find records of this object type when they search." A checkbox for "Allow Search" is unchecked.
 - Object Creation Options (Available only when custom object is first created):** Two checkboxes: "Add Notes and Attachments related list to default page layout" and "Launch New Custom Tab Wizard after saving this custom object".
- Buttons:** "Save", "Save & New", and "Cancel" buttons at the bottom of the form.

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

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

- Header:** Includes the Salesforce logo, a search bar labeled "Search Setup", and various navigation icons.
- Breadcrumbs:** Shows "Setup" > "Object Manager".
- Title Bar:** "Object Manager" with a "Help for this Page" link.
- Content Area:**
 - New Custom Object:** A message states "Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles." with links to "Tell me more!" and "Don't show this message again".
 - Custom Object Definition Edit:** Buttons for "Save", "Save & New", and "Cancel".
 - Custom Object Information:**
 - The singular and plural labels are used in tabs, page layouts, and reports.
 - Label:** "department" (example: Account)
 - Plural Label:** "departments" (example: Accounts)
 - Starts with vowel sound:** An unchecked checkbox.
 - Object Name:** "department" (example: Account)
 - Description:** A large text input field.
 - Context-Sensitive Help Setting:** Radio buttons for "Open the standard Salesforce.com Help & Training window" (selected) and "Open a window using a Visualforce page".
 - Content Name:** A dropdown menu set to "None".
 - Enter Record Name Label and Format:**
 - The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.
 - Record Name:** "Department Name" (example: Account Name)
 - Data Type:** "Text" (selected from a dropdown).
 - Optional Features:**
 - Checkboxes for: Allow Reports, Allow Activities, Track Field History, Allow In Chatter Groups, and Enable Licensing (unchecked).
 - Object Classification:**
 - Checkboxes for: Allow Sharing, Allow Bulk API Access (selected), and Allow Streaming API Access (selected).
 - Deployment Status:**
 - Radio buttons for "In Development" (unchecked) and "Deployed" (selected).
 - Search Status:**
 - A note: "When this setting is enabled, your users can find records of this object type when they search." with a "Learn more" link.
 - An unchecked checkbox for "Allow Search".
 - Object Creation Options (Available only when custom object is first created):**
 - Checkboxes for: Add Notes and Attachments related list to default page layout and Launch New Custom Tab Wizard after saving this custom object.
- Buttons at the bottom:** "Save", "Save & New", and "Cancel".

Step 2: Create a Master-Detail Relationship

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

1. Goto Setup > Object Manager.
2. Click on "College__c" to open its settings.

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

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

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

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

The screenshot shows the 'Fields & Relationships' section of the Salesforce Object Manager for the 'CDepartment' object. The left sidebar lists the same navigation links as the first screenshot. The main pane displays a step-by-step wizard for creating a new relationship:

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

Help for this Page [?](#)

Step 3 of 6

Previous Next Cancel

Field Label: College

Field Name: college

Description: (empty)

Help Text: (empty)

Child Relationship Name: CDepartments

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

Allow reparenting: Child records can be reparented to other parent records after they are created

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

Lookup Filter: (empty)

The screenshot shows the Salesforce Object Manager interface. The left sidebar lists various setup options under 'Fields & Relationships'. The main panel is titled 'New Relationship' and is on 'Step 2 of 6'. It asks to 'Select the other object to which this object is related' and has a dropdown set to 'college'. Navigation buttons 'Previous', 'Next', and 'Cancel' are at the bottom.

The screenshot shows the Salesforce Object Manager interface. The left sidebar lists various setup options under 'Fields & Relationships'. The main panel is titled 'New Custom Field' and is on 'Step 1 of 6'. It asks to 'Specify the type of information that the custom field will contain'. Under 'Data Type', the 'Roll Up Summary' option is selected. A detailed description of the 'Roll Up Summary' type is provided, mentioning it's a read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list. Navigation buttons 'Next' and 'Cancel' are at the bottom.

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. The top navigation bar includes the Setup icon, Home, and Object Manager. The main title is "SETUP > OBJECT MANAGER" followed by "CDepartment". On the left, a sidebar lists various setup categories under "Fields & Relationships". The main content area is titled "Fields & Relationships" and displays four items sorted by Field Label. The table columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED.

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 screenshot shows the Salesforce Tabs setup page. The top navigation bar includes the Setup icon, Home, and Object Manager. The main title is "SETUP > TABS". The left sidebar shows a search bar for "tabs" and a section for "User Interface" with "Rename Tabs and Labels" and "Tabs" selected. A message at the bottom says "Didn't find what you're looking for? Try using Global Search." The main content area is titled "Custom Tabs" and includes a "Help for this Page" link. It provides information about Custom Object tabs and their behavior. Below this are sections for "Custom Object Tabs", "Web Tabs", "Visualforce Tabs", "Lightning Component Tabs", and "Lightning Page Tabs", each with a "New" button and a "What Is This?" link. The "Custom Object Tabs" section shows three entries:

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

Salesforce Setup Object Manager college

New Custom Field

Step 5. Add to page layouts

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

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

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

Add Field Page Layout Name
 college Layout

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

Help for this Page

Previous Save & New Save Cancel

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

Salesforce Setup Object Manager college

New Custom Field

Step 4. Establish field-level security

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

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

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

Help for this Page

Previous Next Cancel

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

The screenshot shows the third step of a five-step wizard for creating a new custom field. The title is "New Custom Field". The sub-step is "Step 3 of 5". The main section is titled "Step 3. Define the summary calculation". It includes a "Select Object to Summarize" section where "Master Object" is set to "college" and "Summarized Object" is set to "CDepartments". Below this is a "Select Roll-Up Type" section with radio buttons for COUNT (selected), SUM, MIN, and MAX. A "Field to Aggregate" dropdown is set to "None". Under "Filter Criteria", there are two options: "All records should be included in the calculation" (selected) and "Only records meeting certain criteria should be included in the calculation". Navigation buttons at the bottom right include "Previous", "Next", and "Cancel".

The screenshot shows the second step of a five-step wizard for creating a new custom field. The title is "New Custom Field". The sub-step is "Step 2 of 5". The main section is titled "Step 2. Enter the details". It includes fields for "Field Label" (set to "Total count"), "Field Name" (set to "Total_count"), "Description" (empty), and "Help Text" (empty). There is also a checkbox for "Auto add to custom report type" which is checked, and a sub-checkbox "Add this field to existing custom report types that contain this entity" which is also checked. Navigation buttons at the bottom right include "Previous", "Next", and "Cancel".

The top screenshot shows the 'New Custom Field' wizard for the 'college' object. It's on Step 1, 'Choose the field type'. The 'Roll-Up Summary' type is selected. The bottom screenshot shows the 'Fields & Relationships' list for the 'college' object, displaying four fields: 'Name' (Text(80)), 'Created By' (Lookup(User)), 'Last Modified By' (Lookup(User)), and 'Owner' (Lookup(User,Group)).

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

Step 4: Create a Lightning App

- 1. Type and select "App Manager."**
- 2. Click "New Lightning App."**
- 3. Fill in basic information (Name, Developer Name, Description).**

- 4. Choose the App Type (Standard, Console, Custom).**
- 5. Customize the Logo and Colour Scheme.**
- 6. Configure Navigation Items (objects to appear in the app's menu).**
- 7. Set the App Visibility (default access).**
- 8. Optionally, choose Record Pages (Lightning Record Pages).**
- 9. Review and Save the app.**
- 10. Assign the app to users or profiles.**
- 11. Test the app with the assigned users.**

The screenshot shows the Salesforce Setup interface with the 'Tabs' page selected. The top navigation bar includes 'Setup', 'Home', 'Object Manager', and a search bar. The left sidebar has sections for 'User Interface' (selected), 'Rename Tabs and Labels', and 'Tabs'. A message at the top says 'Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'New Custom Object Tab' and 'Step 2. Add to Profiles'. It displays a table where user profiles are mapped to tab visibility. The first row is selected with the radio button 'Apply one tab visibility to all profiles [Default On]'. The table has two columns: 'Profile' and 'Tab Visibility'. Most profiles have 'Default On' selected, except for 'Customer Community User' which has 'Default Off'. The bottom right of the table area contains 'Previous', 'Next', and 'Cancel' buttons.

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

Setup Home Object Manager

User Interface Rename Tabs and Labels Tabs

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

SETUP Tabs

New Custom Object Tab

Step 1. Enter the Details Step 1 of 3

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

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

Object: college

Tab Style: Jewel

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

Splash Page Custom Link: —None--

Description:

Next Cancel

Setup Home Object Manager

User Interface Rename Tabs and Labels Tabs

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

SETUP Tabs

Step 3. Add to Custom Apps Step 3 of 3

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

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

Previous Save Cancel

Setup Home Object Manager

tabs

User Interface Rename Tabs and Labels Tabs

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

SETUP Tabs

New Custom Object Tab

Step 1. Enter the Details Step 1 of 3

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

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

Object: CDepartment

Tab Style: Lightning

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

Splash Page Custom Link: None

Description:

Next Cancel

Setup Home Object Manager

app

Salesforce Mobile App Data Mass Transfer Approval Requests Apps App Manager AppExchange Marketplace Connected Apps Connected Apps OAuth Usage Manage Connected Apps Lightning Bolt Flow Category Lightning Bolt Solutions Mobile Apps Salesforce Packaging Installed Packages

SETUP Lightning Experience App Manager

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

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

New Lightning App New Connected App

The screenshot shows the Salesforce Setup interface with the 'Tabs' tab selected under 'User Interface'. The main content area displays sections for 'Custom Tabs', 'Custom Object Tabs', 'Web Tabs', 'Visualforce Tabs', 'Lightning Component Tabs', and 'Lightning Page Tabs'. Each section includes a 'New' button and a 'What Is This?' link. The 'Custom Object Tabs' section lists several tabs with their labels and styles:

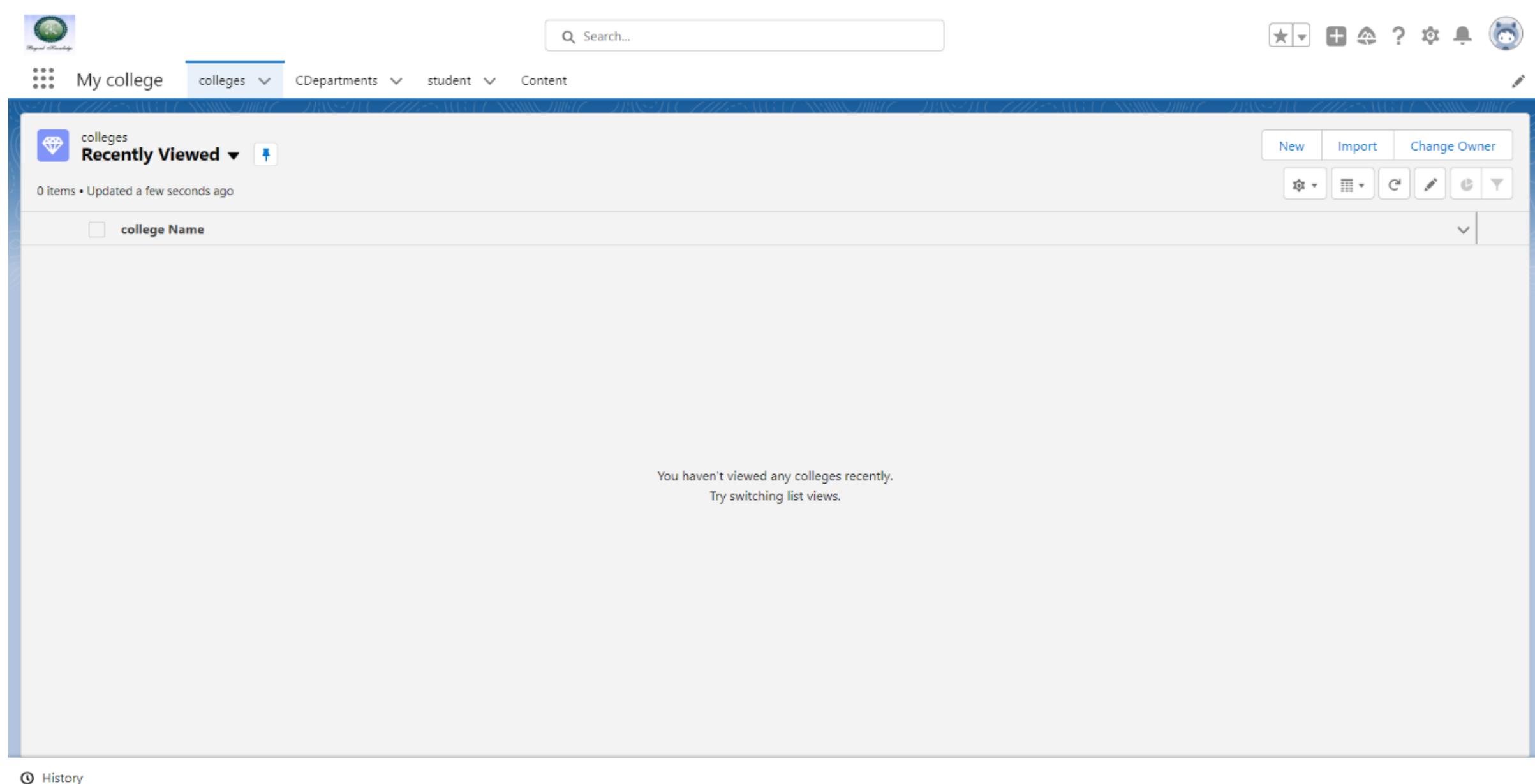
Action	Label	Tab Style	Description
Edit Del	Book1	Box	
Edit Del	CDepartments	Lightning	
Edit Del	colleges	Jewel	
Edit Del	Research Proposal	Square	
Edit Del	student	Box	

The screenshot shows the 'New Lightning App' configuration page. The left sidebar shows the navigation path: 'Salesforce Home' > 'Data' > 'Apps' > 'New App'. The main form is titled 'App Details & Branding' and includes fields for 'App Name' (My college), 'Developer Name' (My_college), 'Description' (Enter a description...), 'Image' (a logo for 'Beyond Knowledge'), 'Primary Color Hex Value' (#217AC7), and 'Org Theme Options' (checkbox checked). A progress bar at the bottom indicates step 1 of 5, with a 'Next' button.

Conclusion:

Now, whenever you create or update a record in the "Department_c" related to a "College_c," the "TotalCount_c" field on the "College_c" will automatically update to show the total number of related records.

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



Screenshot of the 'New college' form in a web browser:

The form is titled "New college". It contains the following fields:

- Information** section:
 - * college Name: kiot
 - phone: 9087116402
 - Email: kiot@.ac.in
 - Location**:
 - Latitude: 90
 - Longitude: 80
- Owner: krishna s

Buttons at the bottom: Cancel, Save & New, Save.

Screenshot of the 'CDepartments' list view in a web browser:

The list view shows one item:

Department Name
1 cse

app-d-dev-ed.develop.lightning.force.com/lightning/o/CDepartment_c/new?count=3&nooverride=1&useRecordTypeCheck=1&navigationLocation=LIST_VIEW&uid=169...

Finish update

My college colleges CDepartment

To unpin, pin another list view

New CDepartment

* = Required Information

Information

*Department Name	information technology
*college	kiot
email	it@gmail.com
phone	897577568
hod name	arul
about	

Cancel Save & New Save

CDepartments Recently Viewed

1 item • Updated a minute ago

Department Name

cse

History

The screenshot shows a Salesforce Lightning Experience interface for creating a new CDepartment record. The 'Information' section contains the following data:

- *Department Name: information technology
- *college: kiot
- email: it@gmail.com
- phone: 897577568
- hod name: arul
- about: (empty)

At the bottom of the form are three buttons: 'Cancel', 'Save & New', and a large blue 'Save' button.

My college colleges CDepartments student Content

CDepartment information technology

New Contact Edit New Opportunity

Related	Details
Department Name information technology	
college kiot	
email it@gmail.com	
phone 897577568	
hod name arul	
about	
Created By  krishna s. 01/10/2023, 11:19 am	Last Modified By  krishna s. 01/10/2023, 11:19 am

History

My college colleges CDepartments student Content

college kiot

New Contact Edit New Opportunity

Related	Details
college Name kiot	Owner  krishna s.
Total count 1	
phone 9087116402	
Email kiot@gmail.com	
Location 90, 80	
Created By  krishna s. 01/10/2023, 11:16 am	Last Modified By  krishna s. 01/10/2023, 11:17 am

History

My college colleges CDepartments student Content

CDepartments Recently Viewed

1 item • Updated a few seconds ago

<input type="checkbox"/> Department Name
1 <input type="checkbox"/> cse

New Import

Recently Viewed

1 item • Updated a few seconds ago

	college Name
1	kiot

New Import Change Owner

grid view list view

History

college kiot

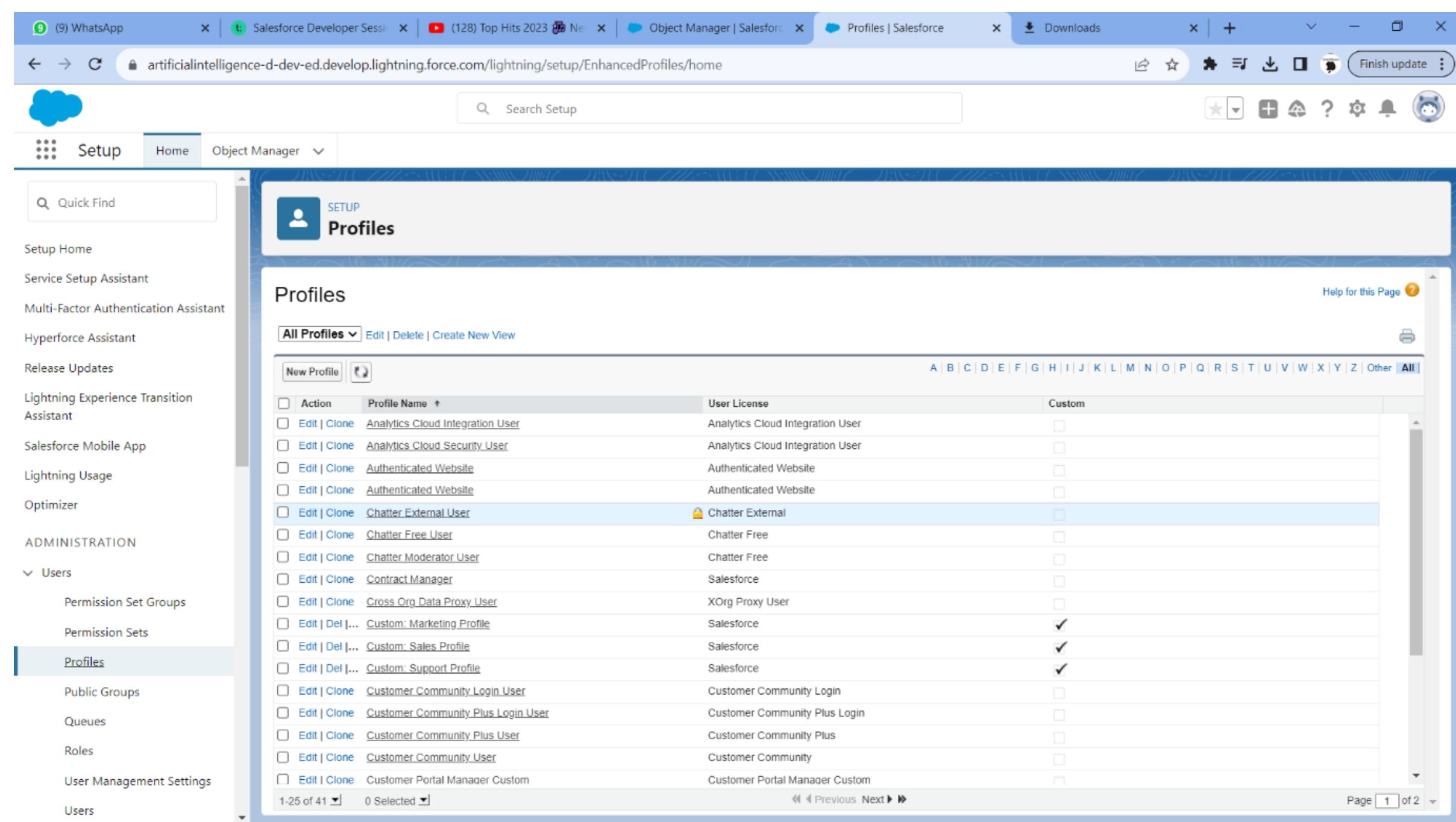
New Contact Edit New Opportunity

Related		Details	
college Name	kiot	Owner	krishna s.
Total count	2		
phone	9087116402		
Email	kiot@gmail.com		
Location	90, 80		
Created By	krishna s., 01/10/2023, 11:16 am	Last Modified By	krishna s., 01/10/2023, 11:19 am

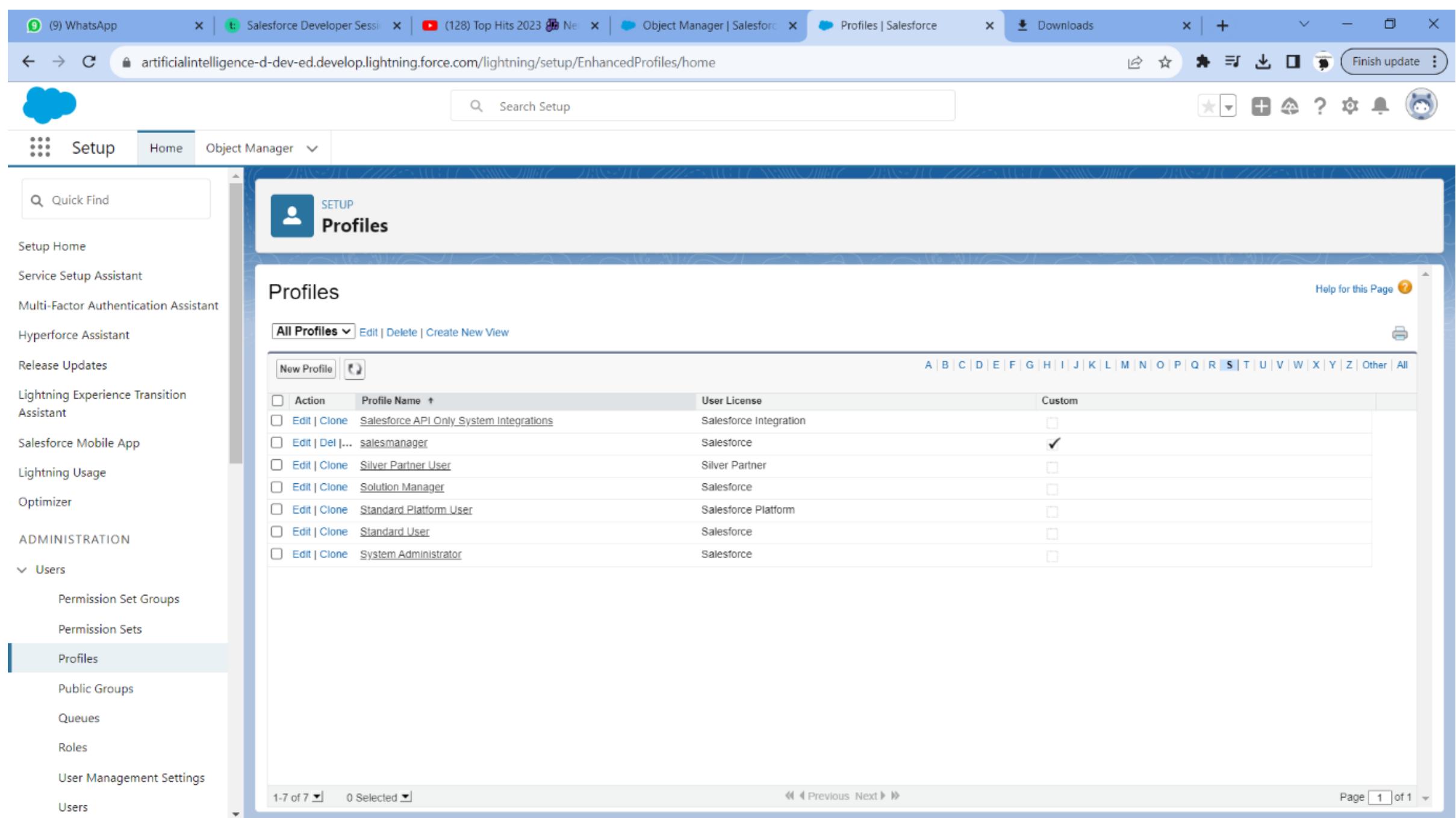
2. If there is 2 user, User A and User B in the organisation and we want in Account object that User A should not see the User B Record and user B should not see User A record then apply the Security for the users.

Solution:

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



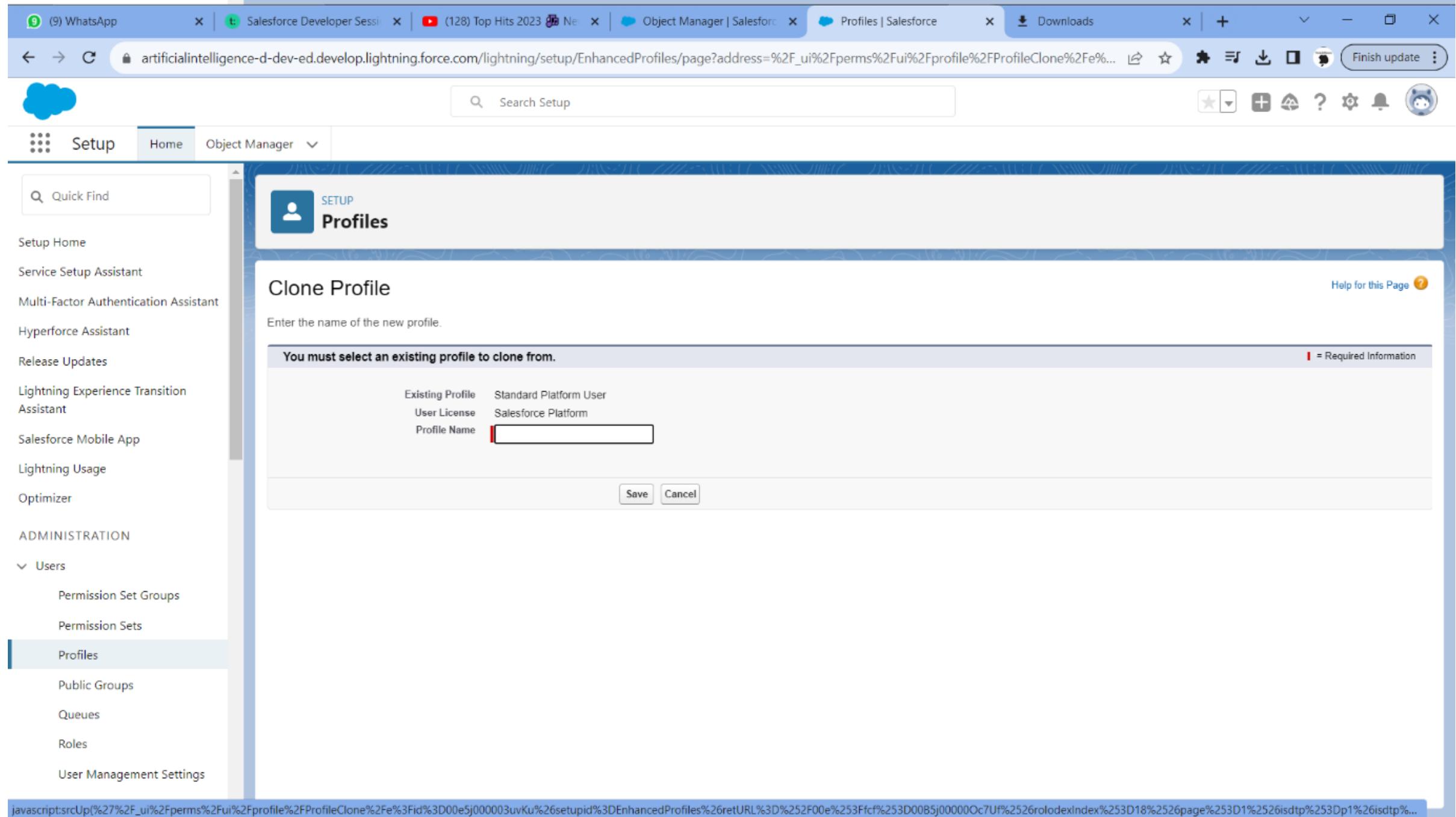
The screenshot shows the Salesforce Setup interface with the 'Profiles' page open. The left sidebar is collapsed, and the main area displays a list of profiles. The 'Chatter External' profile is selected, indicated by a blue highlight. The list includes various standard and custom profiles such as 'Analytics Cloud Integration User', 'Analytics Cloud Security User', 'Authenticated Website', 'Chatter External', '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', 'Customer Community Plus User', 'Customer Community User', and 'Customer Portal Manager Custom'. The 'User License' column indicates the type of license assigned to each profile. The 'Actions' column contains links for 'Edit | Clone' for most profiles and 'Edit | Delete' for the standard profiles. The top right of the page has a 'Help for this Page' link and a 'Print' icon. The bottom right shows the page number 'Page 1 of 2'.



The screenshot shows the Salesforce Setup interface under the Profiles section. The left sidebar includes links for Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, ADMINISTRATION, and Users. Under Users, the Profiles link is selected. The main content area displays a table of profiles:

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

Help for this Page [?](#)



The screenshot shows the 'Clone Profile' dialog box. It instructs the user to 'Enter the name of the new profile.' A note at the top states 'You must select an existing profile to clone from.' Below this, it shows an 'Existing Profile' table with one entry: Standard Platform User, User License Salesforce Platform, and Profile Name (input field). A note indicates 'I = Required Information'. At the bottom are 'Save' and 'Cancel' buttons.

Salesforce Developer Session | lightning/setup/EnhancedProfiles/page?address=%2Fui%2Fperms%2Fu%2Fprofile%2FProfileClone%2Fe... | Object Manager | Salesforce | Profiles | Salesforce | Downloads | Finish update

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

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

Save Cancel

Help for this Page

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

Salesforce Developer Session | lightning/setup/EnhancedProfiles/page?address=%2F00e5j00000WQBz%3Fsetupid%3DEnhancedProfiles | Object Manager | Salesforce | Profiles | Salesforce | Downloads | Finish update

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.

Profile Detail

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

Page Layouts

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

Setup Home Object Manager

Profiles

Manager

Set the permissions and page layouts for this profile.

Profile Edit

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

Custom App Settings

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

Service Provider Access

Overwrite users' personal tab customizations

Tab Settings

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

Communication Subscription Channel Types

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

Custom Object Permissions

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

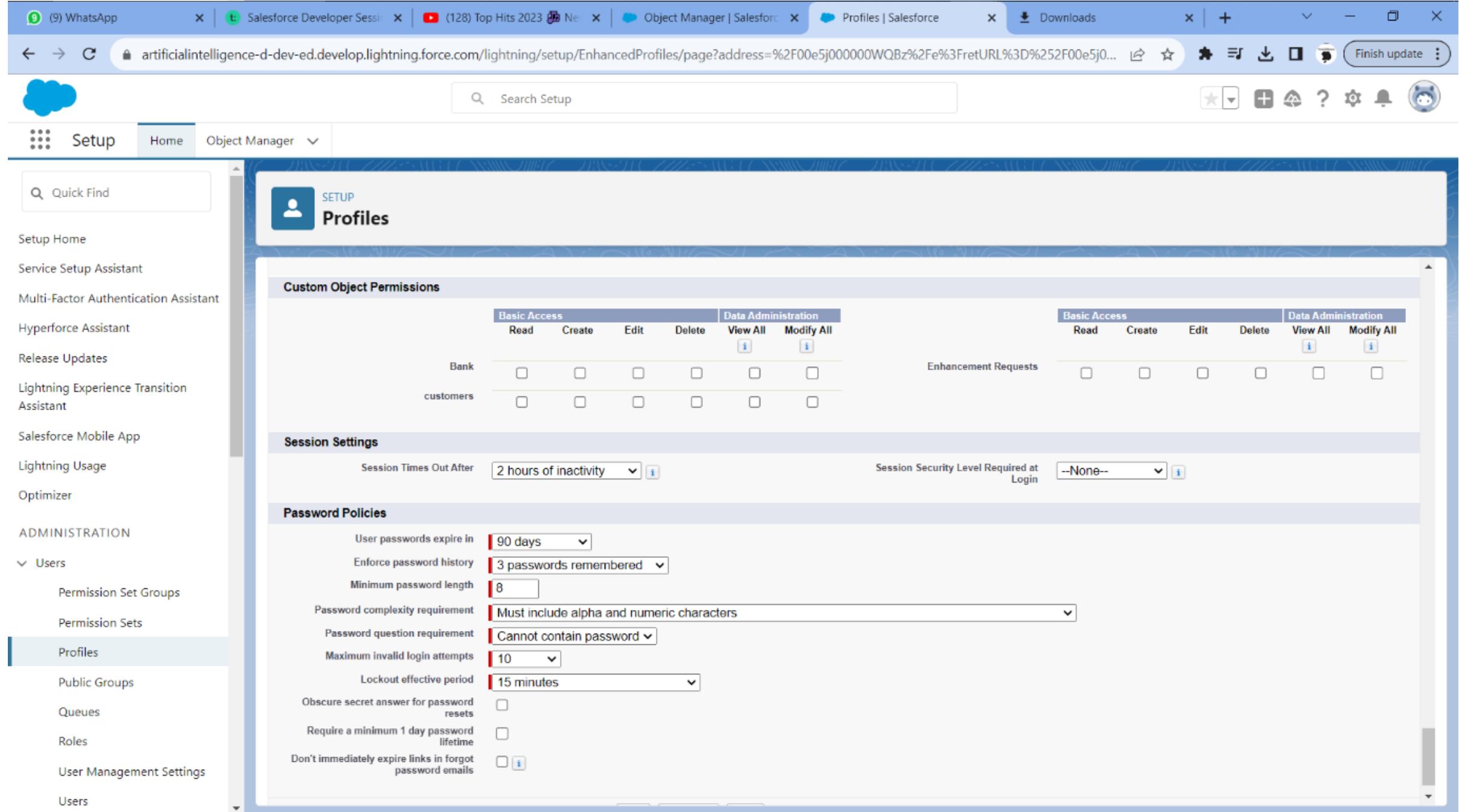
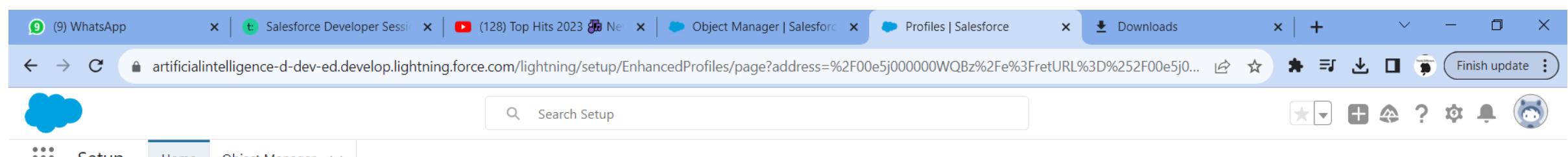
Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

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



Setup Home Object Manager

Profiles

Custom Object Permissions

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

Enhancement Requests

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

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

Users

All Users

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

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

View: All Users | [Edit](#) | [Create New View](#)

Action	Full Name	Alias	Username	Role	Active	Profile
Edit Login	Adanna_Diya	dadan	test_diya_pas_4w8bjybi5wiktszorgsbkxpx_3qj8ofoyzwns_h43bkzw6mea@gmail.com		<input checked="" type="checkbox"/>	UMS User
Edit	Chatter Expert	Chatter	chatty_00d5j00000bcskkeab_1c0fwmqgike@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
Edit Login	Ellington_Amelia	aeilli	amelia_ellington_1_46kxcp9oodih_d6cwpdcuo4wh_hnbdwmvwhhg_wguctpr1dalv@gmail.com		<input checked="" type="checkbox"/>	Standard Platform User
Edit	S_GOPAL	GS	kios20@gmail.com		<input checked="" type="checkbox"/>	System Administrator
Edit	User_Integration	integ	integration@00d5j00000bcskkeab.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
Edit	User_Security	sec	insightssecurity@00d5j00000bcskkeab.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

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

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

Setup Home Object Manager

Users

New User

User Edit

General Information

First Name: []

Last Name: []

Alias: []

Email: []

Username: []

Nickname: []

Title: []

Company: []

Department: []

Division: []

Role: <None Specified>

User License: Salesforce Integration

Profile: Salesforce API Only System Integrations

Active:

Marketing User:

Offline User:

Knowledge User:

Flow User:

Service Cloud User:

Site.com Contributor User:

Site.com Publisher User:

WDC User:

Data.com User Type: -None-

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

Accessibility Mode (Classic Only):

High-Contrast Palette on Charts:

Load Lightning Pages While Scrolling:

Debug Mode:

Help for this Page

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

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

Setup Home Object Manager

Users

New User

User Edit

General Information

First Name: sowmiya

Last Name: bala

Alias: sbala

Email: 2k20cse179@kiot.ac.in

Username: 2k21it@kiot.ac.in

Nickname: User169616771282564526

Title: worker

Company: kiot bank

Department: []

Division: []

Role: <None Specified>

User License: Salesforce Platform

Profile: Manager

Active:

Marketing User:

Offline User:

Knowledge User:

Flow User:

Service Cloud User:

Site.com Contributor User:

Site.com Publisher User:

WDC User:

Data.com User Type: -None-

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

Accessibility Mode (Classic Only):

High-Contrast Palette on Charts:

Load Lightning Pages While Scrolling:

Debug Mode:

Help for this Page

The image shows a dual-monitor setup. The left monitor displays the Salesforce User Management interface, specifically the 'Users' page for a user named 'sowmiya bala'. The right monitor displays the Gmail inbox.

Salesforce User Management (Left Monitor):

- User Detail:** Name: sowmiya bala, Alias: sibala, Email: 2k20cse179@kiot.ac.in [Verify], Username: 2k21it@kiot.ac.in, Nickname: User16961677128296452616, Title: worker, Company: kiot bank.
- Role:** User License: Salesforce Platform Profile: Manager, Active: checked.
- Delegated Approver:** Manager: Only if I am an approver.
- Mobile Push Registrations:** View.
- Accessibility Mode (Classic Only):** checked.
- High-Contrast Palette on Charts:** checked.
- Salesforce CRM Content User:** checked.

Gmail Inbox (Right Monitor):

- Inbox:** 5,318 messages.
- Message Preview:** An email from support@salesforce.com with the subject "Welcome to Salesforce!" and a "Verify Account" button.
- Message Content:** Click below to verify your account.
<https://artificialintelligence-d-dev-ed.develop.my.salesforce.com>
Username: 2k21it@kiot.ac.in
Again, welcome to Salesforce!

Change Your Password

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

- 8 characters
- 1 letter
- 1 number

* New Password
..... Good

* Confirm New Password
..... Match

Security Question
In what city were you born?

* Answer
salem

Change Password

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

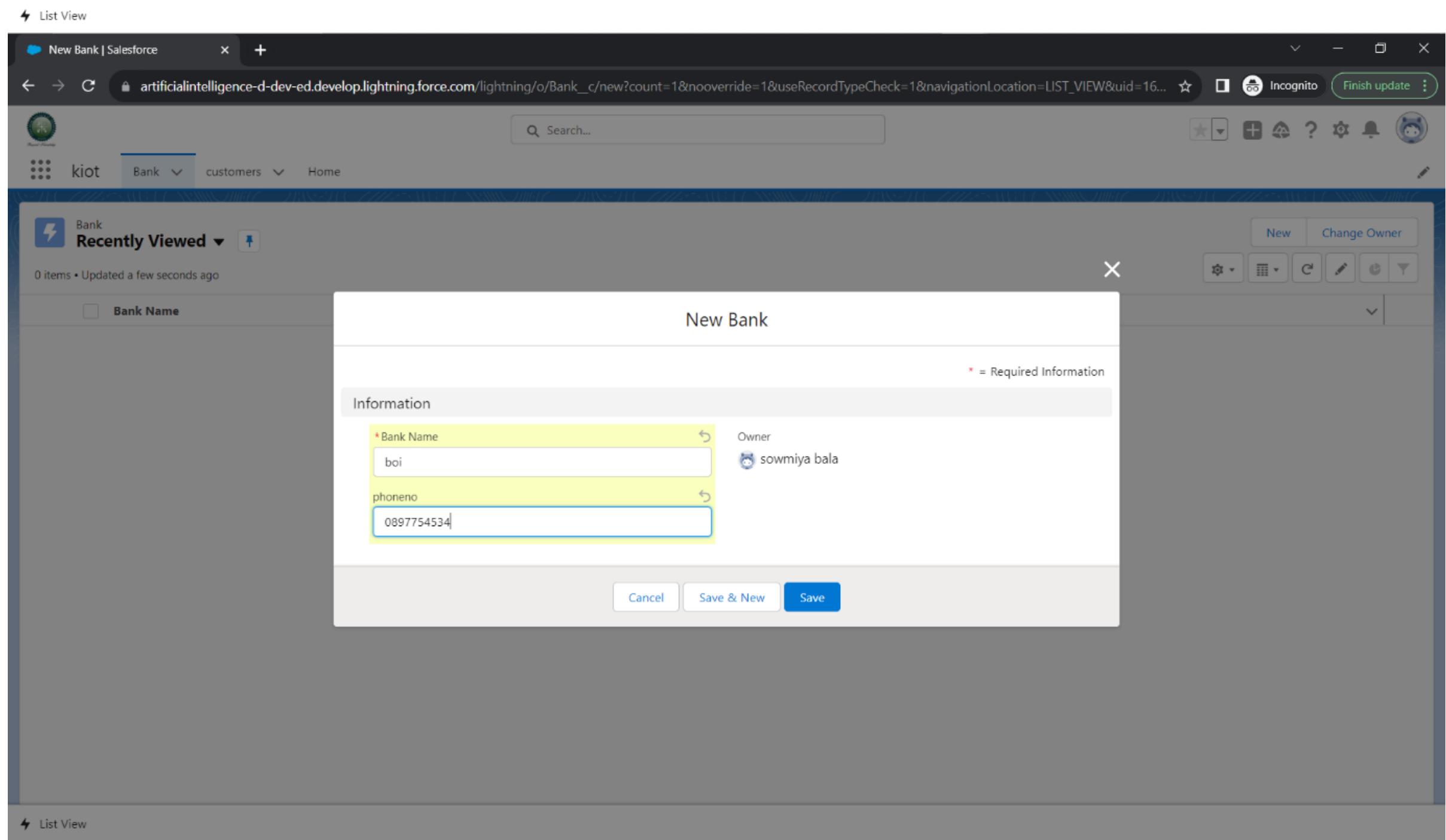
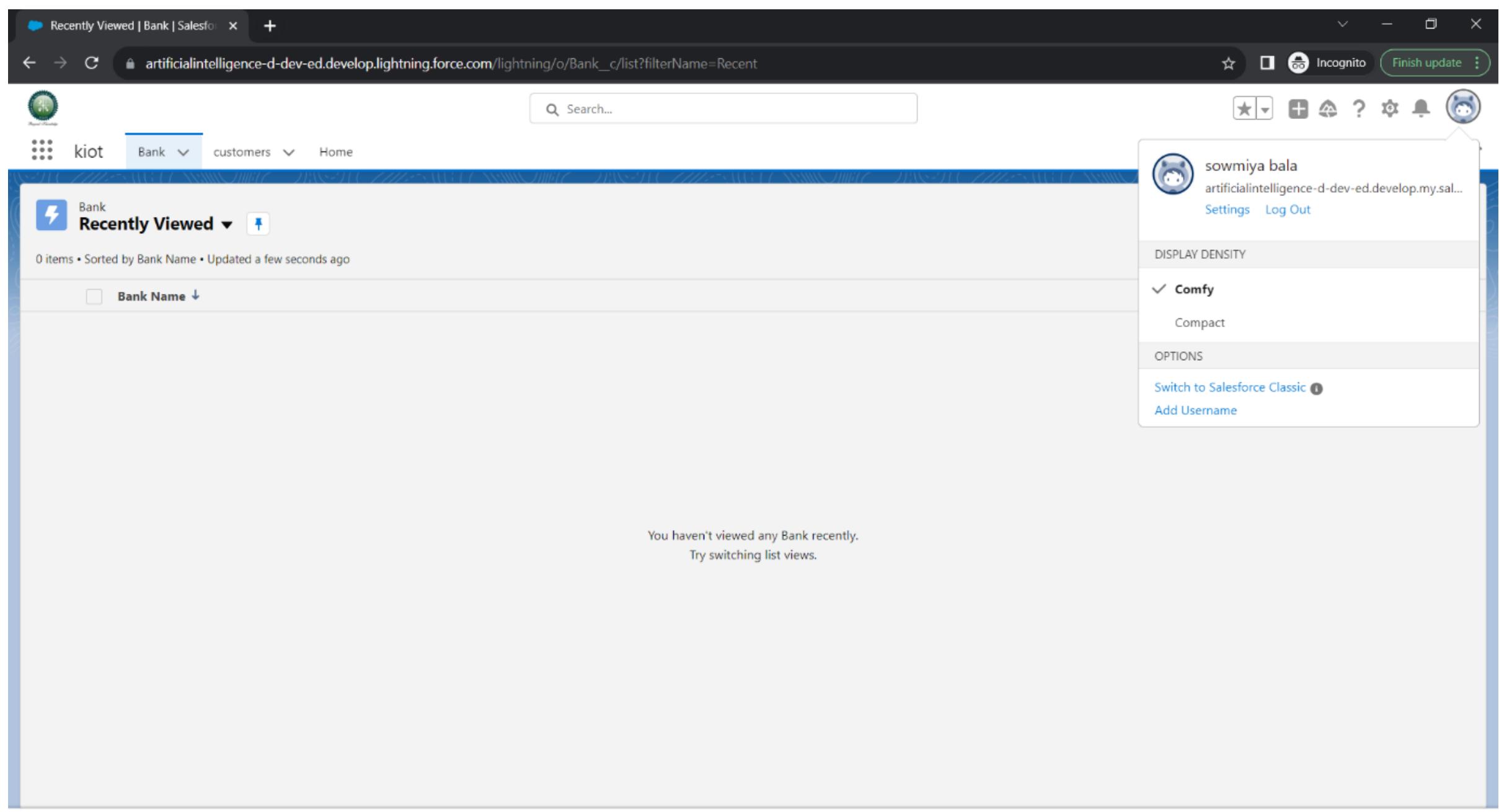
Login | Salesforce

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

WATCH ON DEMAND

AIDay

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New customer | Salesforce

Recently Viewed

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

customer Name ↓

New customer

Information

*customer Name: madhu

*Bank: boi

Cancel Save & New Save

madhu | customer | Salesforce

customer "madhu" was created.

Related Details

customer Name: madhu

Bank: boi

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

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

New Contact Edit Delete

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

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

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

SETUP Profiles

Profiles

All Profiles | Edit | Delete | Create New View

New Profile

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

1 of 7 | 0 Selected | Previous | Next | Page 1 of 1

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

I = Required Information

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

Save Cancel

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

Setup Profiles

Profile
salesmanage

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

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

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

Profile Detail

Name	Salesmanage	Edit	Clone	Delete	View Users
User License	Salesforce Platform	Custom Profile <input checked="" type="checkbox"/>			
Description					
Created By	GOPAL S. 01/10/2023, 7:19 pm	Modified By GOPAL S. 01/10/2023, 7:19 pm			

Page Layouts

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

ADMINISTRATION

Users

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

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

Setup Profiles

Profile Edit
salesmanage

Set the permissions and page layouts for this profile.

Profile Edit

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

Custom App Settings

Analytics Studio (standard__Insights)	<input type="checkbox"/>	<input checked="" type="radio"/>	Visible	Default
App Launcher (standard__AppLauncher)	<input type="checkbox"/>	<input checked="" type="radio"/>	Visible	Default
kiot (kiot)	<input checked="" type="checkbox"/>	<input type="radio"/>	Visible	Default

Service Provider Access

Tab Settings

Overwrite users' personal tab customizations

Standard Tab Settings	Home	Default On	Learning	<input type="button" value="Default On"/>
Accounts	<input type="radio"/>	<input checked="" type="radio"/>	Billing	<input type="radio"/>
Opportunities	<input type="radio"/>	<input checked="" type="radio"/>	Lead	<input type="radio"/>
Tasks	<input type="radio"/>	<input checked="" type="radio"/>	Case	<input type="radio"/>
Events	<input type="radio"/>	<input checked="" type="radio"/>	Case History	<input type="radio"/>

Salesforce Developer Session 2 | Profiles | Salesforce | Welcome to Salesforce: Verify your...

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

Custom Object Permissions

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

Contact Point Emails User External Credentials

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: -None-

Password Policies

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

Salesforce Developer Session 2 | Profiles | Salesforce | Welcome to Salesforce: Verify your...

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

Custom Object Permissions

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

Contact Point Emails User External Credentials

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: -None-

Password Policies

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

Save Save & New Cancel

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

Setup Home Object Manager

Search Setup

Cloud icon

User icon

SETUP Users

New User

User Edit

General Information

First Name:

Last Name:

Alias:

Email:

Username:

Nickname:

Title:

Company:

Department:

Division:

Role: <None Specified>

User License: Salesforce Integration

Profile: Salesforce API Only System Integrations

Active:

Marketing User:

Offline User:

Knowledge User:

Flow User:

Service Cloud User:

Site.com Contributor User:

Site.com Publisher User:

WDC User:

Data.com User Type: -None-

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

Accessibility Mode (Classic Only):

High-Contrast Palette on Charts:

Load Lightning Pages While Scrolling:

Debug Mode:

Help for this Page

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

Setup Home Object Manager

Search Setup

Cloud icon

User icon

SETUP Users

New User

User Edit

General Information

First Name: madhu

Last Name: b

Alias: mb

Email: 2k20cse179@kiot.ac.in

Username: 2k20cse179@kiot.ac.in

Nickname: User169616842428654192

Title: worker

Company: kiot bank

Department: Sales

Division:

Role: <None Specified>

User License: Salesforce Platform

Profile: salesmanage

Active:

Marketing User:

Offline User:

Knowledge User:

Flow User:

Service Cloud User:

Site.com Contributor User:

Site.com Publisher User:

WDC User:

Data.com User Type: -None-

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

Accessibility Mode (Classic Only):

High-Contrast Palette on Charts:

Load Lightning Pages While Scrolling:

Debug Mode:

Help for this Page

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

Setup Home Object Manager

Search Setup

Cloud icon

Setup Home Object Manager

Users

Mailing Address

Street: []

City: []

Zip/Postal Code: []

State/Province: []

Country: []

Single Sign On Information

Federation ID: []

Locale Settings

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

Locale: English (India)

Language: English

Approver Settings

Delegated Approver: []

Manager: []

Receive Approval Request Emails: Only if I am an approver

Generate new password and notify user immediately:

Save Save & New Cancel

(9) WhatsApp | (128) Top Hits 2023 | New Post | Users | Salesforce | Welcome to Salesforce: Verify your email

Setup Home Object Manager

Search Setup

Cloud icon

Setup Home Object Manager

Users

Mailing Address

Street: 4/194, ariyampalayam, uthamasolapuram..

City: SALEM

Zip/Postal Code: 636308

State/Province: TAMIL NADU

Country: []

Single Sign On Information

Federation ID: []

Locale Settings

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

Locale: English (India)

Language: English

Approver Settings

Delegated Approver: []

Manager: []

Receive Approval Request Emails: Only if I am an approver

Generate new password and notify user immediately:

Save Save & New Cancel

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

Setup Home Object Manager

Search Setup

Cloud icon

Setup Home Object Manager

Users

Mailing Address

Street: 4/194, ariyampalayam, uthamasolapuram..

City: SALEM

Zip/Postal Code: 636308

State/Province: TAMIL NADU

Country: []

Single Sign On Information

Federation ID: []

Locale Settings

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

Locale: English (India)

Language: English

Approver Settings

Delegated Approver: []

Manager: []

Receive Approval Request Emails: Only if I am an approver

Generate new password and notify user immediately:

Save Save & New Cancel

(9) WhatsApp | (128) Top Hits 2023 | New Post | Users | Salesforce | Welcome to Salesforce: Verify your email

Setup Home Object Manager

Search Setup

Cloud icon

Setup Home Object Manager

Users

Mailing Address

Street: 4/194, ariyampalayam, uthamasolapuram..

City: SALEM

Zip/Postal Code: 636308

State/Province: TAMIL NADU

Country: []

Single Sign On Information

Federation ID: []

Locale Settings

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

Locale: English (India)

Language: English

Approver Settings

Delegated Approver: []

Manager: []

Receive Approval Request Emails: Only if I am an approver

Generate new password and notify user immediately:

Save Save & New Cancel

The image displays two screenshots of a web browser showing the configuration and verification of a new Salesforce user account.

Screenshot 1: Salesforce Setup - User Detail

This screenshot shows the Salesforce Setup interface under the "Users" section. A user named "madhu b" is being edited. The "Edit" tab is selected. The user's details include:

- Name:** madhu b
- Alias:** mb
- Email:** 2k20cse179@kiot.ac.in [Verify]
- Username:** 2k20csit@kiot.ac.in
- Nickname:** Use@16961684242865419206
- Title:** worker
- Company:** kiot bank
- Department:** Sales
- Division:**
- Address:** 4/194, ariyampalayam, uthamasolapuram, Parakkadu, salem- 636308 SALEM 636308 TAMIL NADU
- Time Zone:** (GMT+05:30) India Standard Time (Asia/Kolkata)
- Locale:** English (India)
- Language:** English
- Delegated Approver:**
- Manager:**
- Receive Approval Request Emails:** Only if I am an approver
- Federation ID:**
- App Registration: One-Time Password Authenticator:**

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

Screenshot 2: Gmail inbox - Salesforce welcome email

This screenshot shows an incoming email in a Gmail inbox. The subject is "Welcome to Salesforce!". The email body contains the following text:

Welcome to Salesforce!

Click below to verify your account.

Verify Account

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

Username:
`2k20csit@kiot.ac.in`

Again, welcome to Salesforce!

At the bottom of the email, there are "Reply" and "Forward" buttons.

Change Your Password | Salesforce

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

salesforce

Change Your Password

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

- 8 characters
- 1 letter
- 1 number

* New Password
..... Good

* Confirm New Password
..... Match

Security Question
In what city were you born?

* Answer
india

Change Password

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

Recently Viewed | Bank | Salesforce

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

Recently Viewed

Bank

customers

Home

Search...

New

Bank Name

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

List View

Recently Viewed | customers | S

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

Incognito (3) Finish update

kiot Bank customers Home

Recently Viewed

0 items • Updated a few seconds ago

customer Name

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

List View

This screenshot shows the Salesforce Lightning interface. The top navigation bar includes links for 'Recently Viewed', 'customers', and 'Home'. Below the navigation is a search bar and a toolbar with various icons. The main content area is titled 'Recently Viewed' under the 'customers' category. It displays a message stating 'You haven't viewed any customers recently.' with a suggestion to 'Try switching list views.' There is also a 'customer Name' search field. The bottom of the page has a 'List View' link and a standard browser footer.

(9) WhatsApp

Salesforce Developer Session

(128) Top Hits 2023

Permission Sets | Salesforce

Welcome to Salesforce: Ve

Reset Password | Salesforce

Finish update

Setup Home Object Manager

user

Users

Permission Set Groups

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

SETUP Permission Sets

Help for this Page

Permission Sets

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

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

All Permission Sets | Edit | Delete | Create New View

Action	Permission Set Label	Description	License
<input type="checkbox"/>	Access_to_activity	Allows access to the store. Lets users see products and categories, ...	B2B Buyer Permission Set One Seat
<input type="checkbox"/>	Clone	Buyer	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/>	Clone	Buyer Manager	CRM User
<input type="checkbox"/>	Clone	CRM User	Commerce Admin Permission Set License Seat
<input type="checkbox"/>	Clone	Commerce Admin	Allow access to commerce admin features.
<input type="checkbox"/>	Clone	Contact Center Admin	Manage Service Cloud Voice contact centers that use Amazon Conn...
<input type="checkbox"/>	Clone	Contact Center Agent	Service Cloud Voice User
<input type="checkbox"/>	Clone	Contact Center Supervisor	Access agent features in Service Cloud Voice contact centers th...
<input type="checkbox"/>	Clone	Experience Profile Manager	Access supervisor features in Service Cloud Voice contact centers th...
<input type="checkbox"/>	Clone	Facility Manager	Salesforce
<input type="checkbox"/>	Clone	FieldServiceMobileStandardPermSet	Facility Manager
<input type="checkbox"/>	Clone	Merchandiser	Field Service Mobile
<input type="checkbox"/>	Clone	Order Management Agent	Commerce Merchandiser User Permission Set License Seat
<input type="checkbox"/>	Clone	Order Management Operations Manager	Read Access to all entities enabled by Order Management
<input type="checkbox"/>	Clone	Order Management Shopper	Access to all features enabled by Order Management
		Limited access to Order Management features for Self Service	Lightning Order Management User

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

This screenshot shows the Salesforce Setup interface. The left sidebar lists various categories like 'Users', 'Feature Settings', 'Data.com', etc. The 'Permission Sets' section is currently selected. The main content area is titled 'Permission Sets' and contains a table of existing permission sets. The table columns are 'Action', 'Permission Set Label', 'Description', and 'License'. The table lists numerous permission sets such as 'Access_to_activity', 'Buyer', 'Buyer Manager', 'CRM User', 'Commerce Admin', etc. At the bottom of the table, there are navigation links for 'Previous' and 'Next' pages, and a note indicating 'Page 1 of 2'.

Step 2:

Permission Sets:

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

Object-Level Security:

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

Record-Level Security:

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

User A, and records owned by User B are shared with User B.

Ownership:

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

Organization-Wide Defaults:

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

Testing:

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

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

The page title is "Permission Sets".

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

The main content area displays a table of permission sets:

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

Page: 1 of 2

Salesforce Developer Session | Lightning | Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce: Version 43 | Reset Password | Salesforce

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2Fudd%2FPermissionSet%2FnewPermissionSet.apexp

Setup Home Object Manager

Search Setup

Cloud icon

Setup Home Object Manager

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

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SETUP

Permission Sets

Create

Help for this Page

Enter permission set information

Label:

API Name:

Description:

Session Activation Required:

Select the type of users who will use this permission set

Who will use this permission set?

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

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

License:

Save Cancel

Cloud icon

Setup Home Object Manager

Search Setup

Cloud icon

Setup Home Object Manager

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

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App Menu

SETUP

Permission Sets

Create

Help for this Page

Enter permission set information

Label: salesmanager

API Name: salesmanager

Description:

Session Activation Required:

Select the type of users who will use this permission set

Who will use this permission set?

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

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

License:

Save Cancel

Salesforce Developer Session | Lightning | Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce: Version 43 | Reset Password | Salesforce

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2Fudd%2FPermissionSet%2FnewPermissionSet.apexp

Setup Home Object Manager

Search Setup

Cloud icon

Setup Home Object Manager

Users

Permission Set Groups

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Permission Sets

Create

Help for this Page

Enter permission set information

Label: salesmanager

API Name: salesmanager

Description:

Session Activation Required:

Select the type of users who will use this permission set

Who will use this permission set?

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

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

License:

Save Cancel

Cloud icon

Setup Home Object Manager

Search Setup

Cloud icon

Setup Home Object Manager

Users

Permission Set Groups

Permission Sets

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SETUP

Permission Sets

Create

Help for this Page

Enter permission set information

Label: salesmanager

API Name: salesmanager

Description:

Session Activation Required:

Select the type of users who will use this permission set

Who will use this permission set?

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

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

License:

Save Cancel

Permission Sets

salesmanager

Permission Set Overview

API Name	Description	License	Namespace Prefix	Created By	Last Modified By
salesmanager				GOPAL S.	01/10/2023, 7:29 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**: Permissions to authenticate against external data sources
- Flow Access**: Permissions to execute Flows

Object Settings

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

Salesforce Developer Session

Permission Sets | Salesforce

Welcome to Salesforce: Venkatesh

Reset Password | Salesforce

Finish update

Setup Home Object Manager

Search Setup

Video Tutorial | Help for this Page

Permission Set Overview > Object Settings Bank

Tab Settings

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

Object Permissions

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

Field Permissions

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

Save Cancel

Object Settings Bank

Tab Settings

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

Object Permissions

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

Field Permissions

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

Save Cancel

Object Settings Bank

Tab Settings

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

Object Permissions

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

Field Permissions

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

Salesforce Setup interface showing the creation of a Permission Set Assignment.

The top window shows the "Current Assignments" screen for the "salesmanager" permission set. It displays a cactus and sun illustration with the message "No assignments defined." The sidebar navigation includes "Users", "Permission Sets", and "User Interface".

The bottom window shows the "Select Users to Assign" screen. It lists users under the heading "All Users" with 1 item selected. The user "madhu b" is selected (indicated by a checked checkbox). Other users listed include Amelia Ellington, Chatter Expert, Diya Adanna, GOPAL S, Integration User, Security User, and sowmiya bala. The "Next" button is visible at the bottom right.

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

The top window shows the "Select an Expiration Option FOR Assigned Users" screen. The "No expiration date" option is selected. A table lists a single user, "madhu b", assigned to the "salesmanager" profile, with "Salesforce Platform" as the User License and "Never Expires" as the Expires On date. A "Time Zone" dropdown is also present.

The bottom window shows the "Assignment Summary" screen after the assignment was completed. It displays the same user information: "madhu b" assigned to "salesmanager" with "Salesforce Platform" User License and "Success" status. A green success message at the top states "1 assignments were successful." A "Done" button is visible at the bottom right.

Recently Viewed | customers | S | +

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

Incognito (3) Finish update

kiot Bank customers Home

Search...

Recently Viewed

customers

customer Name

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

LIST VIEW CONTROLS

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

javascript:void(0)

Detailed description: This screenshot shows a Salesforce Lightning interface for managing customer records. The main title is 'Recently Viewed' under the 'customers' object. The list view displays one column named 'customer Name'. A message at the bottom of the list area says, 'You haven't viewed any customers recently. Try switching list views.' On the right side, a context menu is open with several options: 'New' (highlighted in orange), 'Clone', 'Rename', 'Sharing Settings', 'Show List Filters', 'Select Fields to Display', 'Delete', and 'Reset Column Widths'. The browser's address bar shows the specific URL for this list view. The top navigation bar includes links for 'kiot', 'Bank', 'customers', and 'Home', along with a search bar and various browser controls.

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:

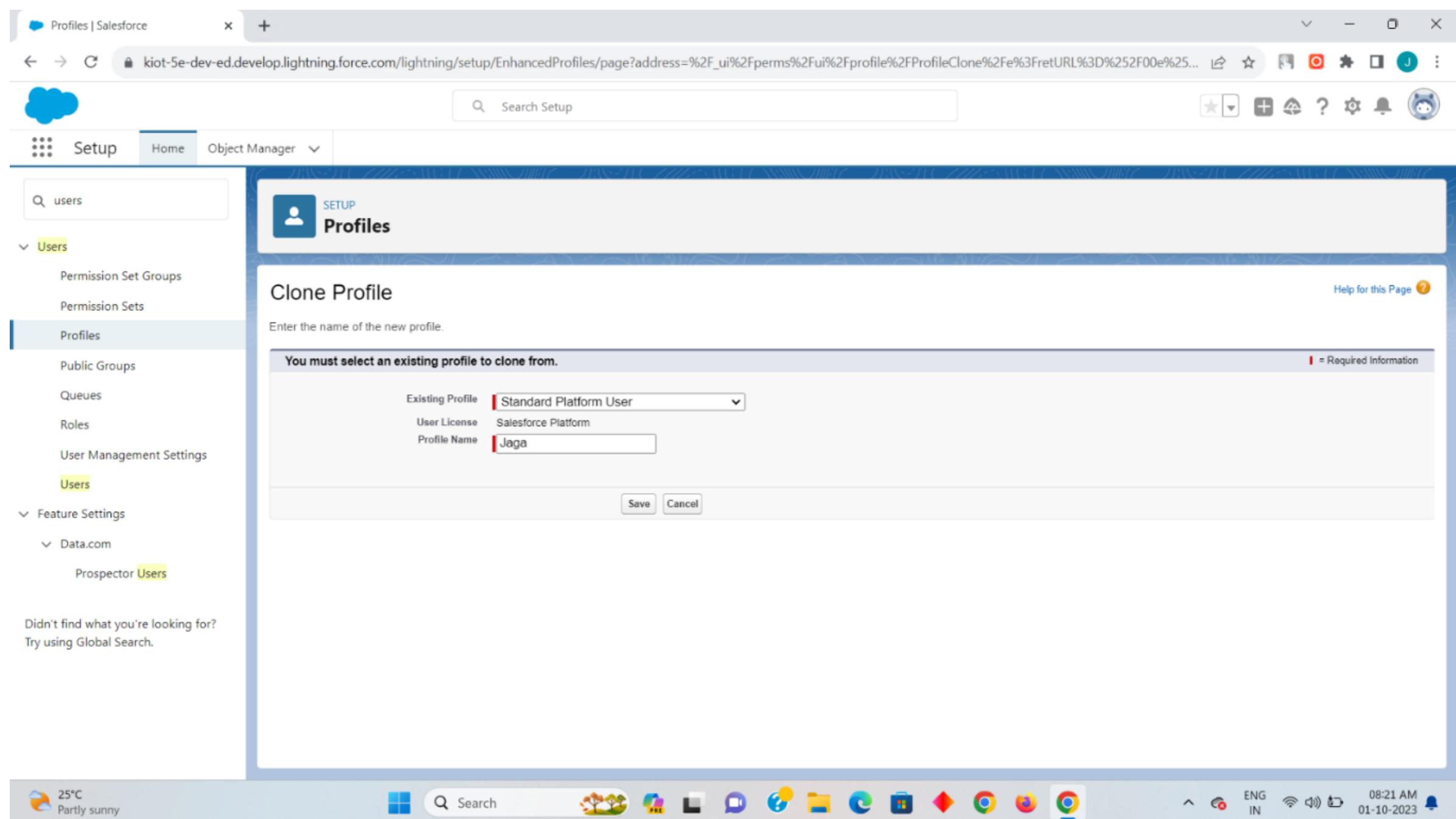
Step 1: we need create a profile for the two user which has the access to Create, Read, Edit follow as per.

Setup-quick search[profile]

The screenshot shows the Salesforce Setup interface for managing Profiles. The left sidebar is collapsed, and the main area displays a list of profiles. The list includes columns for Action, Profile Name, User License, and Custom. The User License column lists various Salesforce licenses such as Analytics Cloud Integration User, Authenticated Website, Chatter External, Chatter Free, Contract Manager, XOrg Proxy User, Salesforce, Customer Community Login, and Customer Community Plus. The Custom column contains checkboxes, many of which are checked. At the bottom of the list, it says "1-25 of 41" and "0 Selected".

Step 2:

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



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

Step 3:

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

The image consists of two vertically stacked screenshots of the Salesforce Setup interface, specifically the 'Profiles' section under 'Users'.

Screenshot 1: Profile Configuration

- Left Panel:** Shows the navigation menu with 'Profiles' selected under 'Users'.
- Right Panel:**
 - Profile Detail:** Displays the 'Jaga' profile. It shows the name 'Jaga', user license 'Salesforce Platform', and a 'Custom Profile' checkbox checked.
 - Page Layouts:** A table showing standard object layouts for various objects like Global, Email Application, Home Page Layout, Account, Alternative Payment Method, and Appointment Invitation.

Screenshot 2: Object Permissions Configuration

- Left Panel:** Shows the same navigation menu with 'Profiles' selected.
- Right Panel:**
 - Communication Subscription Channel Types:** A grid of checkboxes for various communication types.
 - Custom Object Permissions:** A section with tables for 'Providers' and 'Resources' defining basic access and data administration permissions.
 - Session Settings:** Options for session times out after (set to 2 hours of inactivity), session security level required at login (set to 'None'), and different Experience Cloud login policies.

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

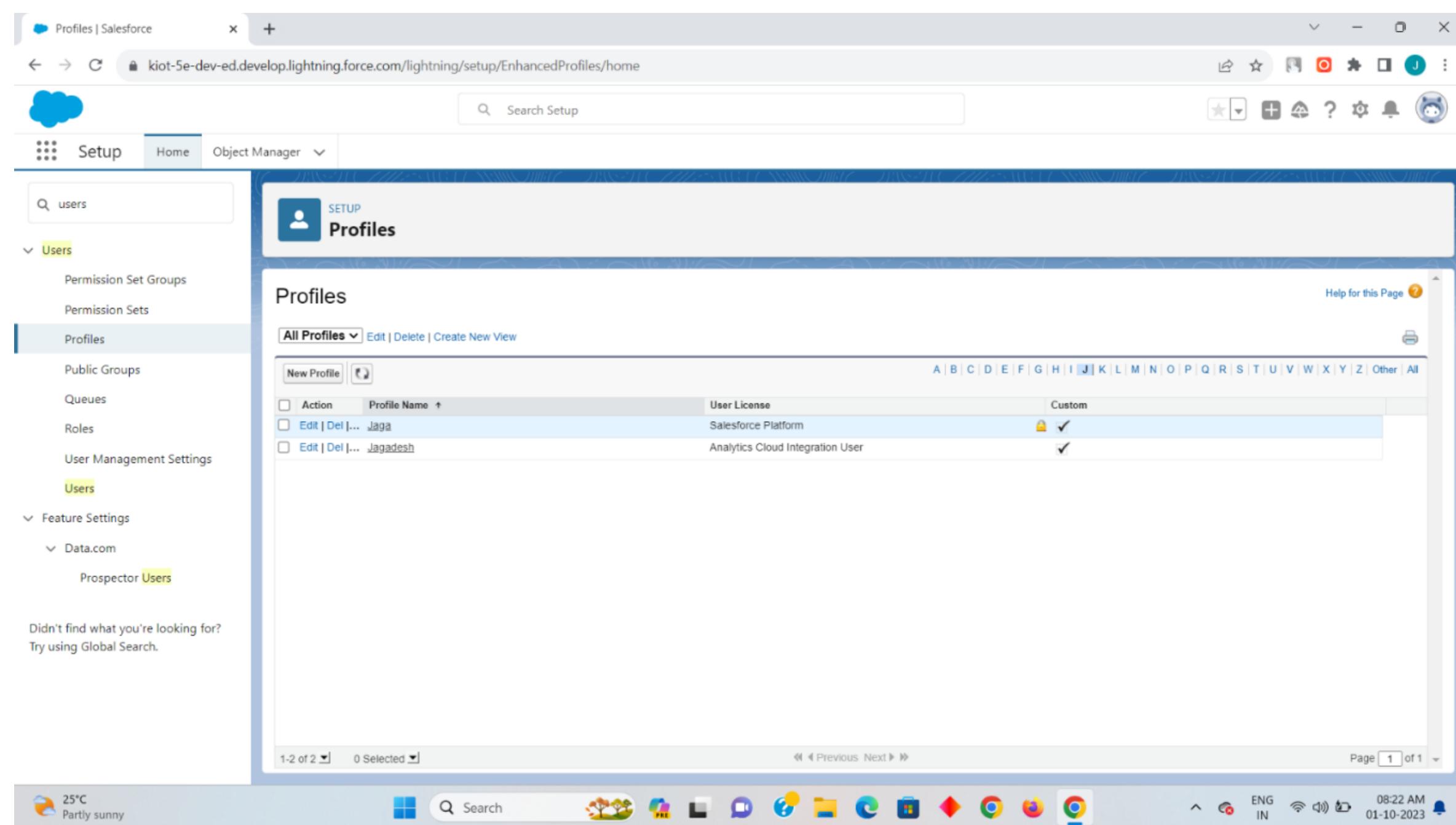
- Page Header:** Profiles | Salesforce
- Search Bar:** Search Setup
- Top Navigation:** Setup (selected), Home, Object Manager
- Left Sidebar:**
 - Users (selected)
 - Permission Set Groups
 - Permission Sets
 - Profiles (selected)
 - Public Groups
 - Queues
 - Roles
 - User Management Settings
 - Users
- Middle Content Area:**
 - Profile Edit:** Jaga
 - Set the permissions and page layouts for this profile.
 - Profile Edit Form:**

Name	Jaga	Save	Save & New	Cancel
User License	Salesforce Platform	Custom Profile <input checked="" type="checkbox"/>		
Description				
 - Custom App Settings:**

	Visible	Default	Visible	Default
Analytics Studio (standard__Insights)	<input type="checkbox"/>	<input type="radio"/>	<input checked="" type="checkbox"/>	<input type="radio"/>
App Launcher (standard__AppLauncher)	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>
Hive App (Hive_App)	<input checked="" type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>
 - Service Provider Access:** (Section header)
 - Tab Settings:** (Section header)
 - Overwrite users' personal tab customizations
- Bottom Navigation:** Cloud Trail icon, Search bar, Home icon, File icon, Chat icon, Folder icon, Microsoft Edge icon, Google Chrome icon, Taskbar icons, and system status icons.

Step 4

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



The screenshot shows the Salesforce Setup interface for managing Profiles. The left sidebar is collapsed, and the main content area is titled 'Profiles'. A sub-header 'All Profiles' is visible. The table lists two profiles:

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

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

Step 5:

Now create two users by enter into the Setup-quick search[user] and then click on new user after clicking that you need to create two user along with the profile as Jaga which we have created on the step 2. once the one user has been created click on the save&new so that you can create the second user and there the user name can be created with alternate name but with the same user profile and once the two user are created click on save.

Salesforce Setup - All Users

This screenshot shows the Salesforce Setup interface for managing users. The left sidebar is collapsed, showing the 'Users' section under 'User Management Settings'. The main content area displays a table of existing users with columns for Action, Full Name, Alias, Username, Role, Active, and Profile. A 'New User' button is at the top left of the table.

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	Chatter Expert	Chatter	chatty_00d5f00000c8joseaf_6z9bkrrkd4@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
Edit	Grey_Jane	jgray	jane_gray.fygnimmoaim.cz7d2kiogtn3@gmail.com		<input checked="" type="checkbox"/>	Customer Community User
Edit	S.Jaga	JS	jaga098@gmail.com	CEO	<input type="checkbox"/>	Standard Platform User
Edit	S.Jagadesh	JS	w0w@gmail.com	SF Admin	<input checked="" type="checkbox"/>	System Administrator
Edit	S.Jagadesh	JS	jaga117@gmail.com	Channel Sales Team	<input type="checkbox"/>	Standard Platform User
Edit	User_Integration	Integ	integration@00d5f00000c8joseaf.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
Edit	User_Security	sec	insightssecurity@00d5f00000c8joseaf.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

Help for this Page ?

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

25°C Partly sunny 08:22 AM 01-10-2023

Salesforce Setup - New User

This screenshot shows the 'New User' creation page. The 'General Information' section is filled with sample data. In the 'Profile' dropdown, 'Jaga' is selected from a dropdown menu. The status bar indicates it's 08:23 AM on 01-10-2023.

First Name	Last Name	Alias	Email	Username	Nickname	Title	Company	Department	Division	Role	User License	Profile	Active	Marketing User	Offline User	Knowledge User	Flow User	Service Cloud User	Site.com Contributor User	Site.com Publisher User	WDC User	Data.com User Type	Data.com Monthly Addition Limit	Accessibility Mode (Classic Only)	High Contrast Palette on Charts	
Jagadesh11	S	JS	jww123@gmail.com	jww123@gmail.com	User169612875144962592					Director, Channel Sales	Salesforce Platform	—None—	—None—	Jaga	Standard Platform User								—None—	(Default Limit 300)		

Help for this Page ?

25°C Partly sunny 08:23 AM 01-10-2023

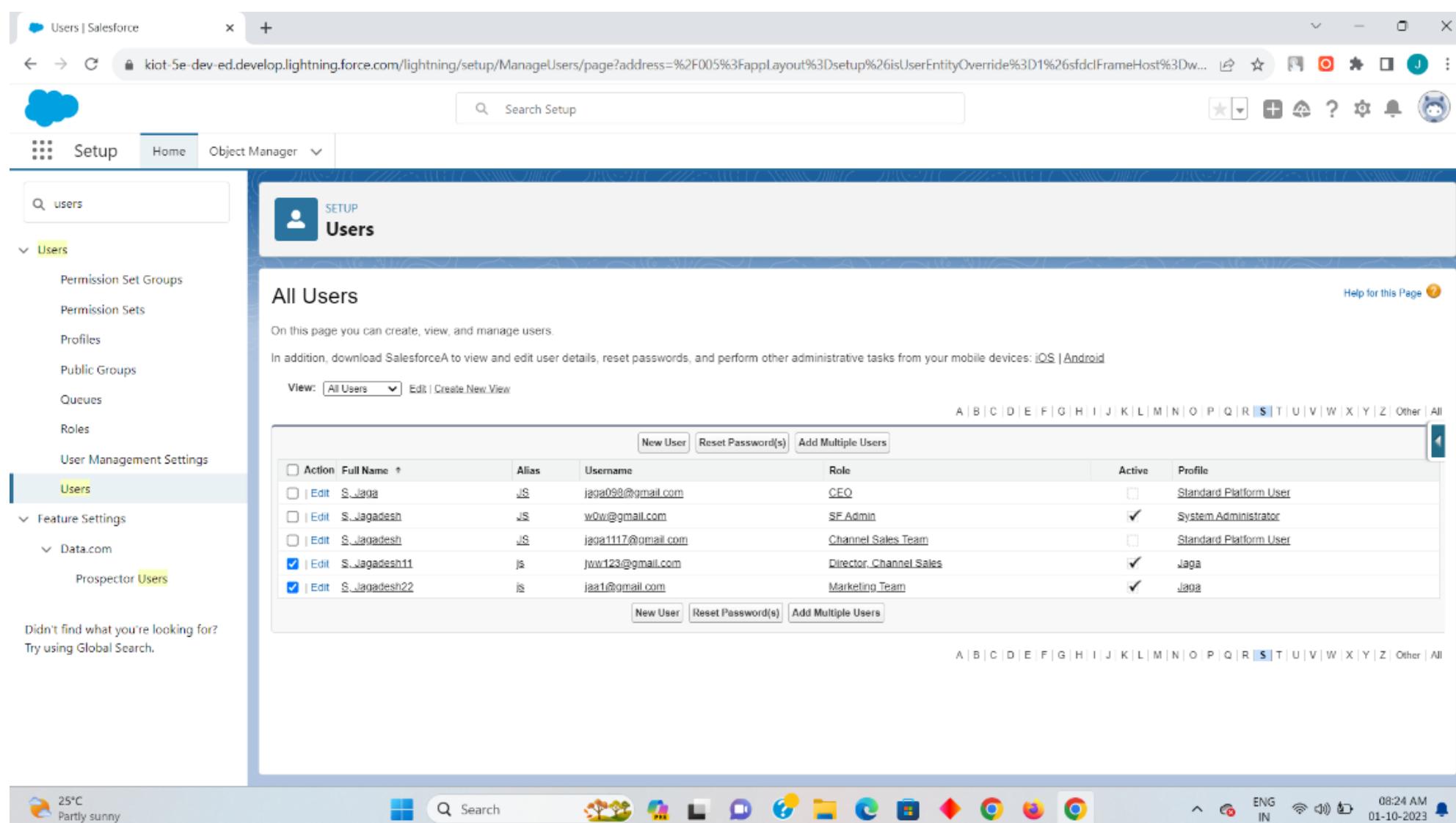
Salesforce Setup - New User

This screenshot shows the 'New User' creation page again. The 'General Information' section is filled with sample data. In the 'Profile' dropdown, 'Jaga' is selected from a dropdown menu. The status bar indicates it's 08:23 AM on 01-10-2023.

First Name	Last Name	Alias	Email	Username	Nickname	Title	Company	Department	Division	Role	User License	Profile	Active	Marketing User	Offline User	Knowledge User	Flow User	Service Cloud User	Site.com Contributor User	Site.com Publisher User	WDC User	Data.com User Type	Data.com Monthly Addition Limit	Accessibility Mode (Classic Only)	High-Contrast Palette on Charts	
Jagadesh22	S	JS	jaa1@gmail.com	jaa1@gmail.com	User169612879983618745					Marketing Team	Salesforce Platform	—None—	—None—	Jaga	Standard Platform User								—None—	(Default Limit 300)		

Help for this Page ?

25°C Partly sunny 08:23 AM 01-10-2023



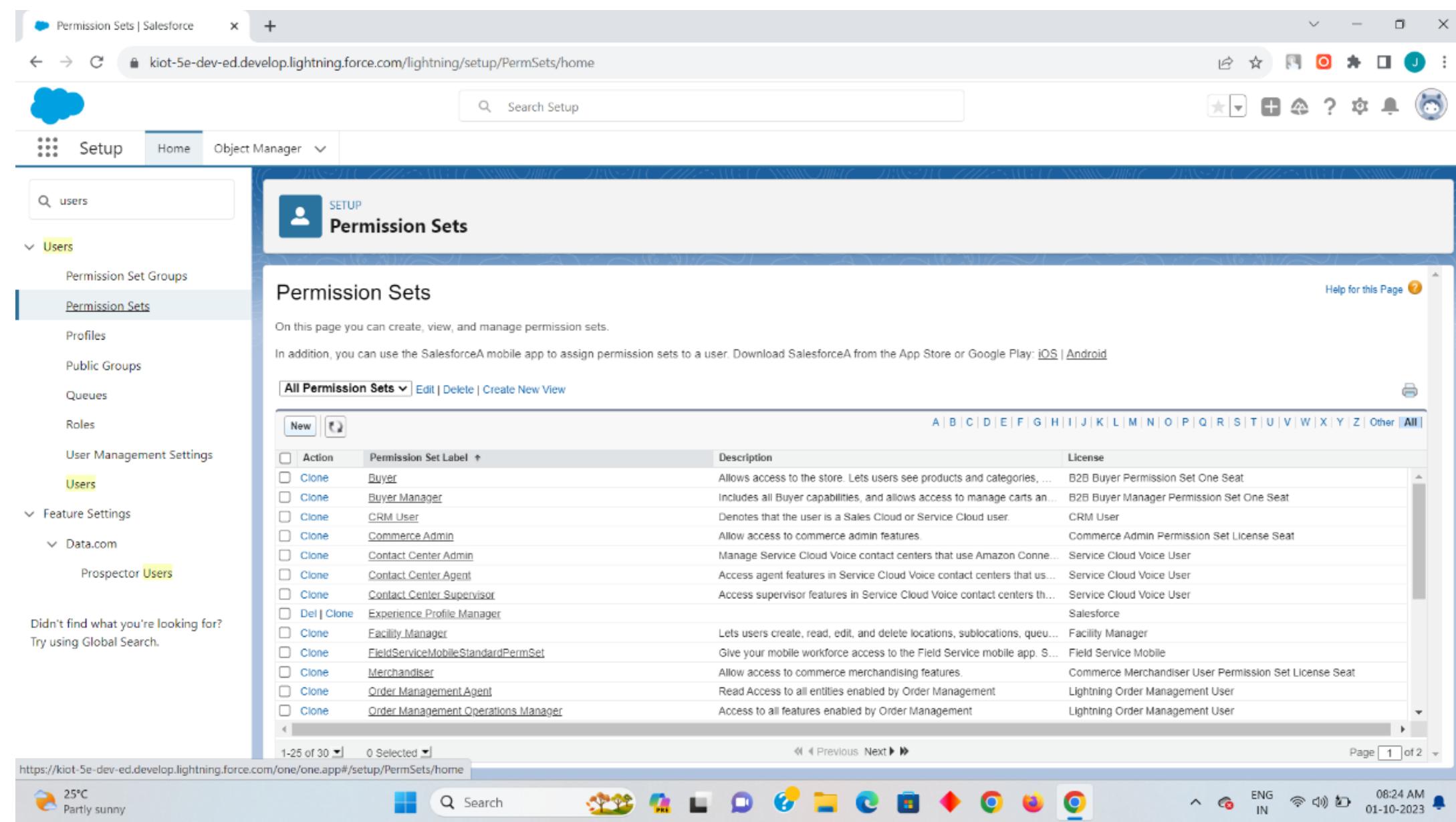
Now you can preview your two user that you have created in my side I had create the two users a Jagadesh11 and Jagadesh22 as a director channel sales with the marketing team.

Step 6:

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

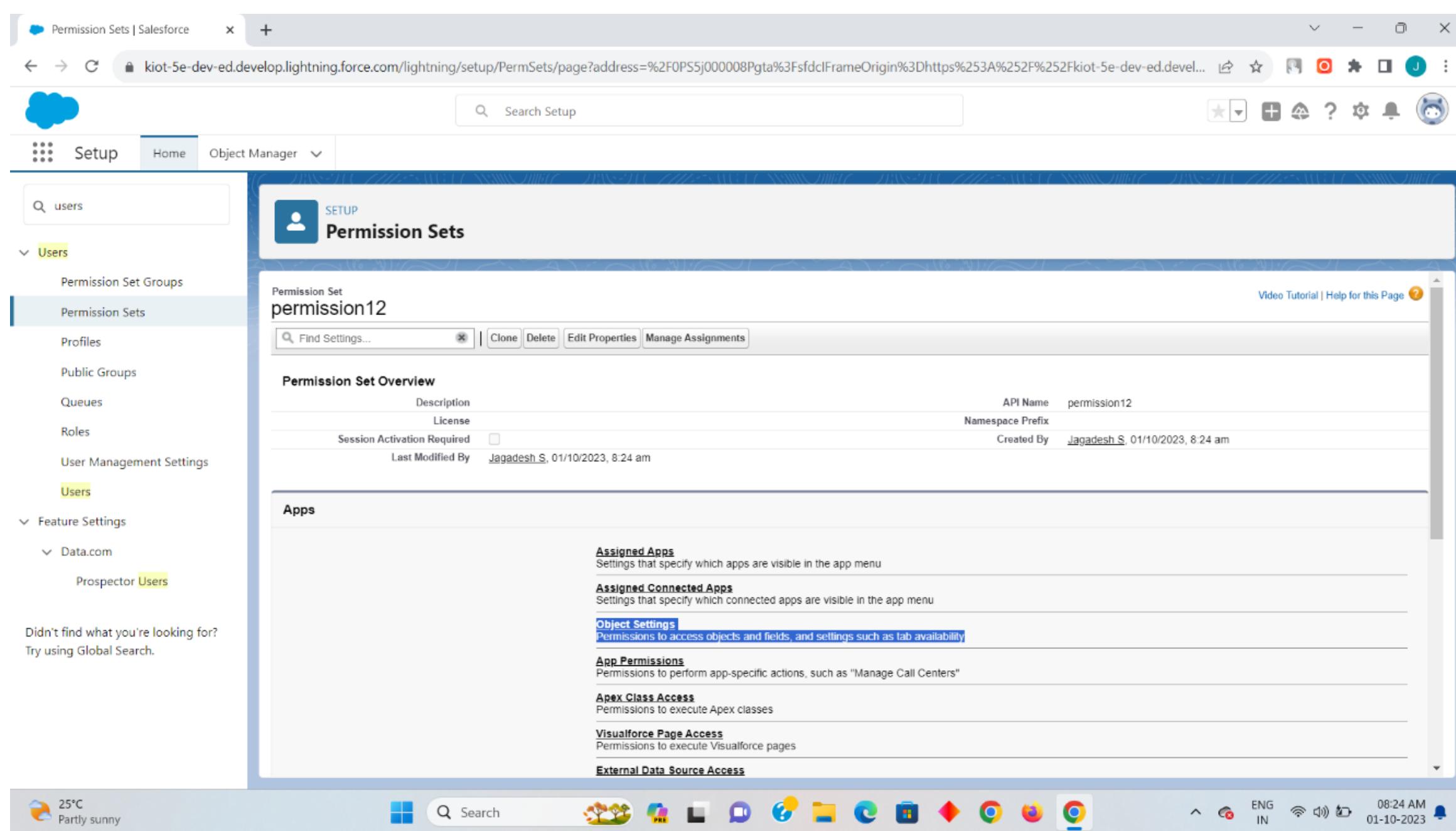
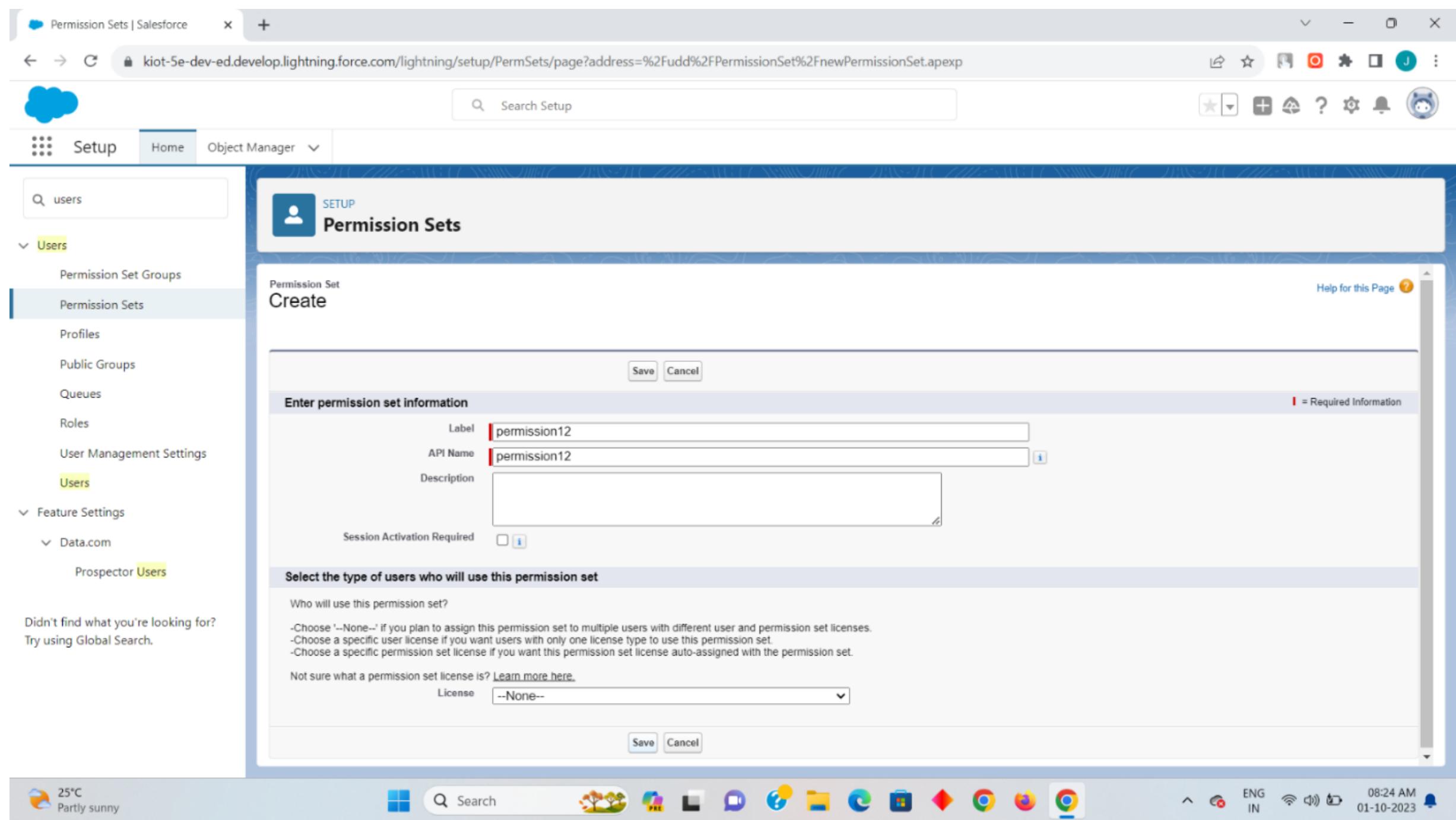
setup-quick search[permission set]-new-fill

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



The screenshot shows the Salesforce Setup interface for managing Permission Sets. The left sidebar is collapsed, and the main content area displays a list of permission sets. The list includes columns for Action, Permission Set Label, Description, and License. The 'Permission Set Label' column is currently sorted by label. The 'Description' column provides a brief overview of the permissions granted by each set. The 'License' column indicates the specific license required for each set. The list contains 30 items, with the first few being 'Buyer', 'Buyer Manager', 'CRM User', and 'Commerce Admin'. The interface includes standard Salesforce navigation elements like a search bar, a help icon, and a toolbar at the top.

Action	Permission Set Label	Description	License
<input type="checkbox"/>	Clone	Buyer	B2B Buyer Permission Set One Seat
<input type="checkbox"/>	Clone	Buyer Manager	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/>	Clone	CRM User	CRM User
<input type="checkbox"/>	Clone	Commerce Admin	Commerce Admin Permission Set License Seat
<input type="checkbox"/>	Clone	Contact Center Admin	Service Cloud Voice User
<input type="checkbox"/>	Clone	Contact Center Agent	Service Cloud Voice User
<input type="checkbox"/>	Clone	Contact Center Supervisor	Service Cloud Voice User
<input type="checkbox"/>	Del Clone	Experience Profile Manager	Salesforce
<input type="checkbox"/>	Clone	Facility Manager	Facility Manager
<input type="checkbox"/>	Clone	FieldServiceMobileStandardPermSet	Field Service Mobile
<input type="checkbox"/>	Clone	Merchandiser	Commerce Merchandiser User Permission Set License Seat
<input type="checkbox"/>	Clone	Order Management Agent	Lightning Order Management User
<input type="checkbox"/>	Clone	Order Management Operations Manager	Lightning Order Management User



The screenshot shows the Salesforce Setup interface for managing Permission Sets. The left sidebar is collapsed, and the main area is titled "Permission Sets". A specific permission set, "permission12", is selected. Under "Object Settings", a table lists various objects and their access levels. The columns include "Object Name", "Object Permissions", "Total Fields", and "Tab Settings". Most objects have "No Access".

Object Name	Object Permissions	Total Fields	Tab Settings
Account Brands	No Access	9	--
Accounts	No Access	44	--
AI Insight Reasons	No Access	--	--
AI Record Insights	No Access	--	--
Alternative Payment Methods	No Access	27	--
API Anomaly_Event_Stores	No Access	14	--
App Analytics Query Requests	No Access	--	--
Application Usage Assignments	No Access	--	--
Appointment Categories	No Access	3	--
Appointment Invitations	No Access	17	--
Appointment Invtees	--	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	--

This screenshot shows the "Object Settings" for the "Accounts" object within the "permission12" permission set. Under "Object Permissions", there is a table with columns "Permission Name" and "Enabled". All permissions (Read, Create, Edit, Delete, View All, Modify All) are currently disabled. Below this is a section for "Field Permissions" with a table showing permissions for fields like Account Name, Account Number, Account Owner, Account Site, and Account Source.

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 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 7:

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

The screenshots show the Salesforce Setup interface for managing Permission Sets. In the 'Object Permissions' section for the 'Accounts' object, the 'Delete' permission is initially unchecked. After being checked and the page saved, the permission is now enabled.

Permission Name	Enabled
Read	<input 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"/>

Field Name	Read Access	Edit Access
Account Name	<input 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

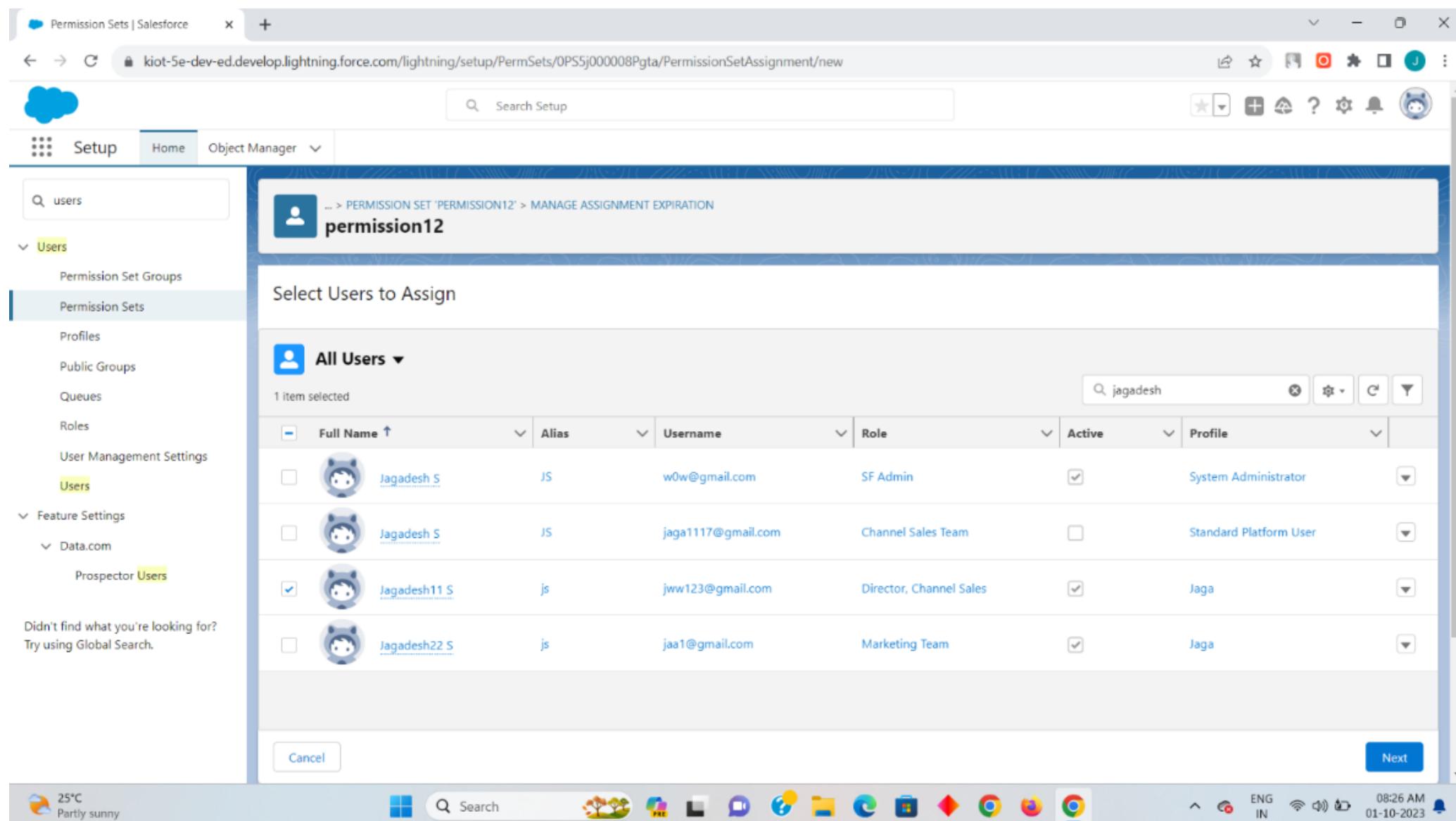
click on assign so that the specific selected user can have a special access as delete on it.

This screenshot shows the 'Permission Sets | Salesforce' page in the Salesforce setup interface. The left sidebar is expanded, showing sections like 'Permission Set Groups', 'Permission Sets' (which is selected), 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', and 'Users'. The main content area is titled 'permission12' and shows a section titled 'Current Assignments' with a sub-section 'No assignments defined.' Below this is a decorative illustration of a cactus and sun. At the bottom of the main content area, there is a note: 'Didn't find what you're looking for? Try using Global Search.'

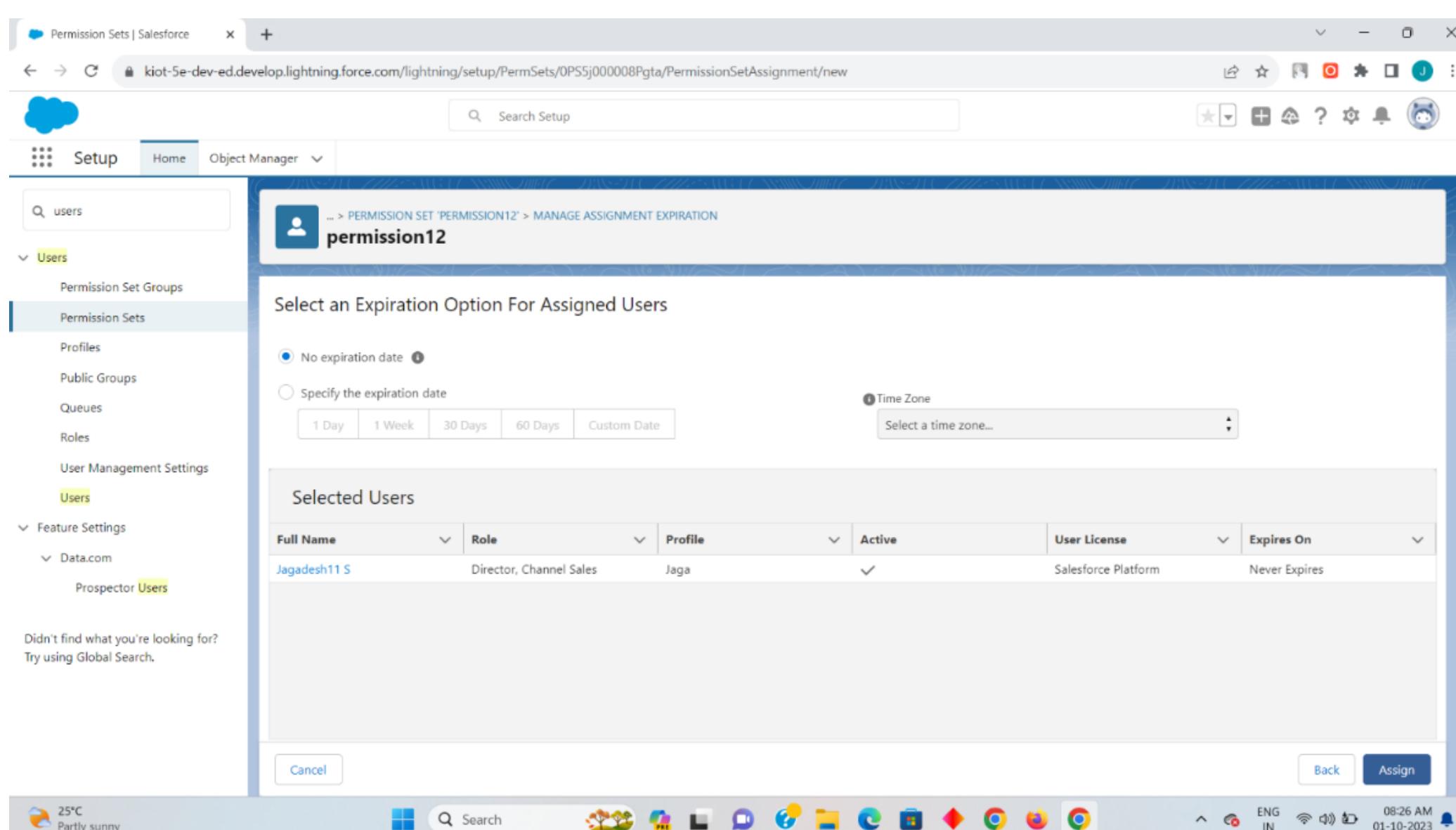
This screenshot shows the 'Manage Assignment Expiration' step of the permission set assignment process. The left sidebar is identical to the previous screenshot. The main content area is titled 'permission12 > PERMISSION SET 'PERMISSION12' > MANAGE ASSIGNMENT EXPIRATION'. It has a heading 'Select Users to Assign' and a sub-section 'All Users'. A search bar at the top of this section contains the text 'jagadesh'. Below the search bar is a table with columns: 'Full Name ↑', 'Alias', 'Username', 'Role', and 'Actions'. There are four users listed:

Full Name ↑	Alias	Username	Role	Actions
Jagadesh S	JS	w0w@gmail.com	SF Admin	<input checked="" type="checkbox"/> System Administrator
Jagadesh S	JS	jaga1117@gmail.com	Channel Sales Team	<input type="checkbox"/> Standard Platform User
Jagadesh11 S	js	jww123@gmail.com	Director, Channel Sales	<input checked="" type="checkbox"/> Jaga
Jagadesh22 S	js	jaa1@gmail.com	Marketing Team	<input checked="" type="checkbox"/> Jaga

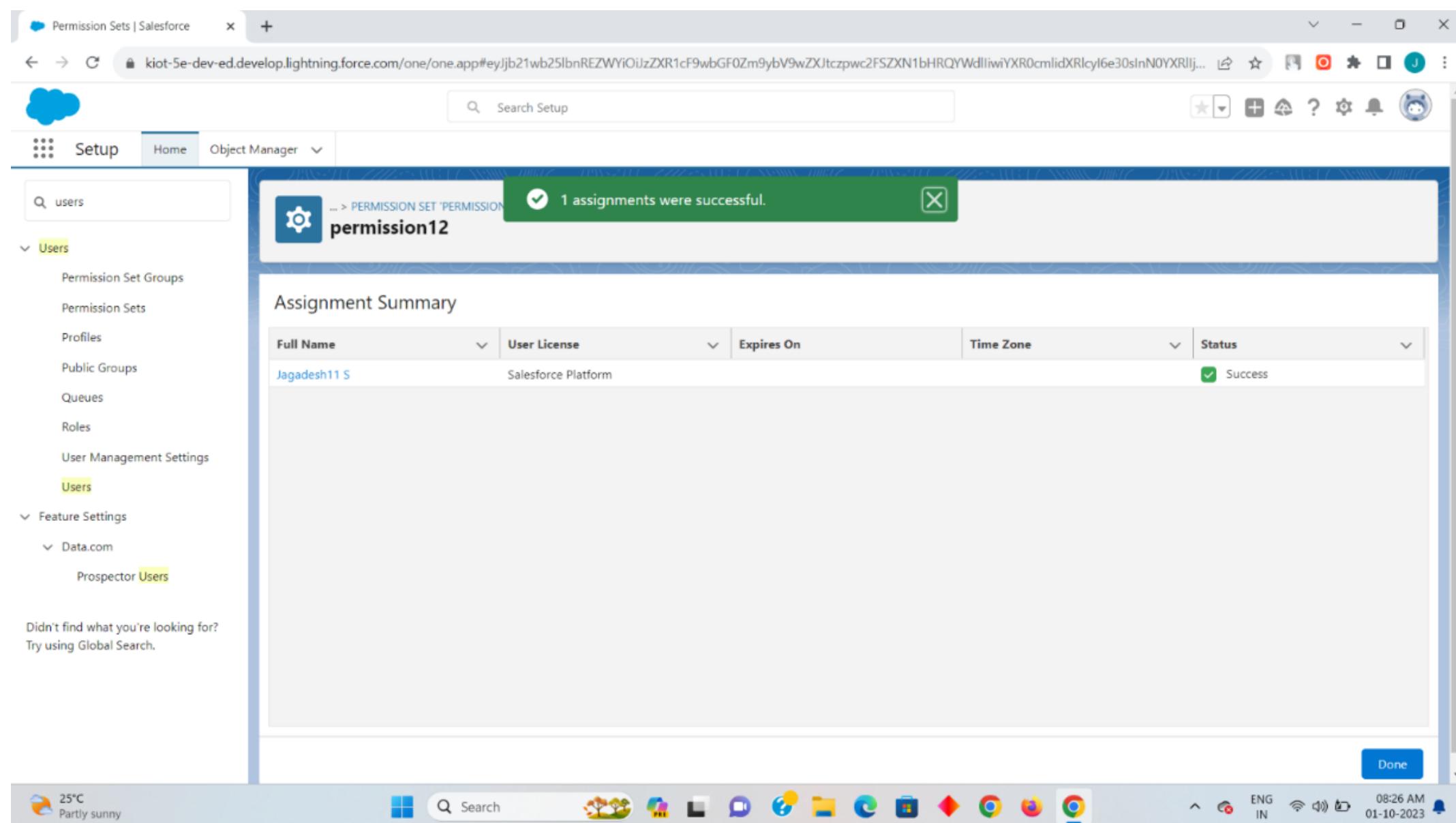
At the bottom of the table are 'Cancel' and 'Next' buttons. The status bar at the bottom of the screen shows '08:26 AM 01-10-2023'.



Click on next.



Now click on Assign.



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

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

Solution:

Step 1: Create a Custom Object

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

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

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

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

1. Click **AppLauncher**.
2. In the Quick Find box, type **Email Templates**.
3. Clicks on the **NewEmail template** button.
4. **Name the Lightning Email Template** and make sure to store it in the **PublicEmail Templates** folder.

5. Create a template like the following screenshot.

The screenshot shows the 'Email Template' page in Salesforce. The title bar says 'Email Template' and 'Thank You Email - Survey'. The top right has buttons for 'Edit in Builder', 'Edit', 'Clone', and a dropdown. Below is a 'Details' tab and a 'Related' tab. Under 'Information', there's a 'Description' section with fields for 'Email Template Name' (set to 'Thank You Email - Survey'), 'Related Entity Type' (set to 'Survey Result'), 'Folder' (set to 'Public Email Templates'), and a checked 'Made in Email Template Builder' checkbox. In the 'Message Content' section, the 'Subject' is 'Thank You For Completing Our Survey!' and the 'HTML Value' contains a personalized message: '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.' It also credits 'Thanks, Automation Champion'. At the bottom, under 'Additional Information', it shows 'Created By' Rakesh Gupta, 12/21/2020, 4:23 PM and 'Last Modified By' Rakesh Gupta, 12/21/2020, 4:32 PM.

Step 3: Create an Email Alert

1. Click **Setup**.
2. In the Quick Find box, type **Email Alerts**.

3. Select **Email Alerts**, click on the **NewEmail Alert** button.
4. Name the **Email Alert** and click the Tab button. The **UniqueName** will populate.
5. For **Object** select **SurveyResult**.
6. For the **Email Template** chooses **Lightning Email Template Thank YouEmail – Survey**.
7. For **RecipientType** 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>?</small>								
Protected Component	<input type="checkbox"/>								
Recipient Type	Search: User <small>?</small> for: <input type="text"/> Find								
Recipients	<table border="1"> <tr> <th>Available Recipients</th> <th>Selected Recipients</th> </tr> <tr> <td>User: Integration User User: Rakesh Gupta User: Security User</td> <td>Email Field: Email</td> </tr> <tr> <td>Add <small>▶</small></td> <td></td> </tr> <tr> <td>Remove <small>◀</small></td> <td></td> </tr> </table>	Available Recipients	Selected Recipients	User: Integration User User: Rakesh Gupta User: Security User	Email Field: Email	Add <small>▶</small>		Remove <small>◀</small>	
Available Recipients	Selected Recipients								
User: Integration User User: Rakesh Gupta User: Security User	Email Field: Email								
Add <small>▶</small>									
Remove <small>◀</small>									
You can enter up to five (5) email addresses to be notified.									
Additional Emails	<input type="text"/>								
From Email Address	<input type="text"/> Current User's email address <small>?</small> <input type="checkbox"/> Make this address the default From email address for this object's email alerts <small>i</small>								

Save Save & New Cancel

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

1. Click **Setup**.
2. In the Quick Find box, type **Flows**.
3. Select **Flows** then click on the **New Flow**.
4. Select the **Screen Flow** option and click on **Next** and configure the flow as follows:
 1. How do you want to start building: **Freeform**

5. We will use the **Screen** element to capture a **Surveyresponse** form. Drag and drop a **Screen** element onto the canvas.

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

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

3. Row 2:

 1. **Field: Email_c**
 2. **Value: {!Email.value}**
4. Click **Add Row**
5. Row 3:

 1. **Field: Name_c**
 2. **Value: {!Name.firstName}**
{!Name.lastName}
6. Click **Add Row**
7. Row 3:

 1. **Field: Rating_c**
 2. **Value: {!Rating}**
7. Click **Done.**

Edit Create Records

Create Salesforce records using values from the flow.

* Label	* API Name
Save Response	Save_Response

Description

How Many Records to Create

- One
- Multiple

How to Set the Record Fields

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

Create a Record of This Object

* Object

Survey Result

Set Field Values for the Survey Result

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

+ Add Field

Manually assign variables

Cancel Done

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

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

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

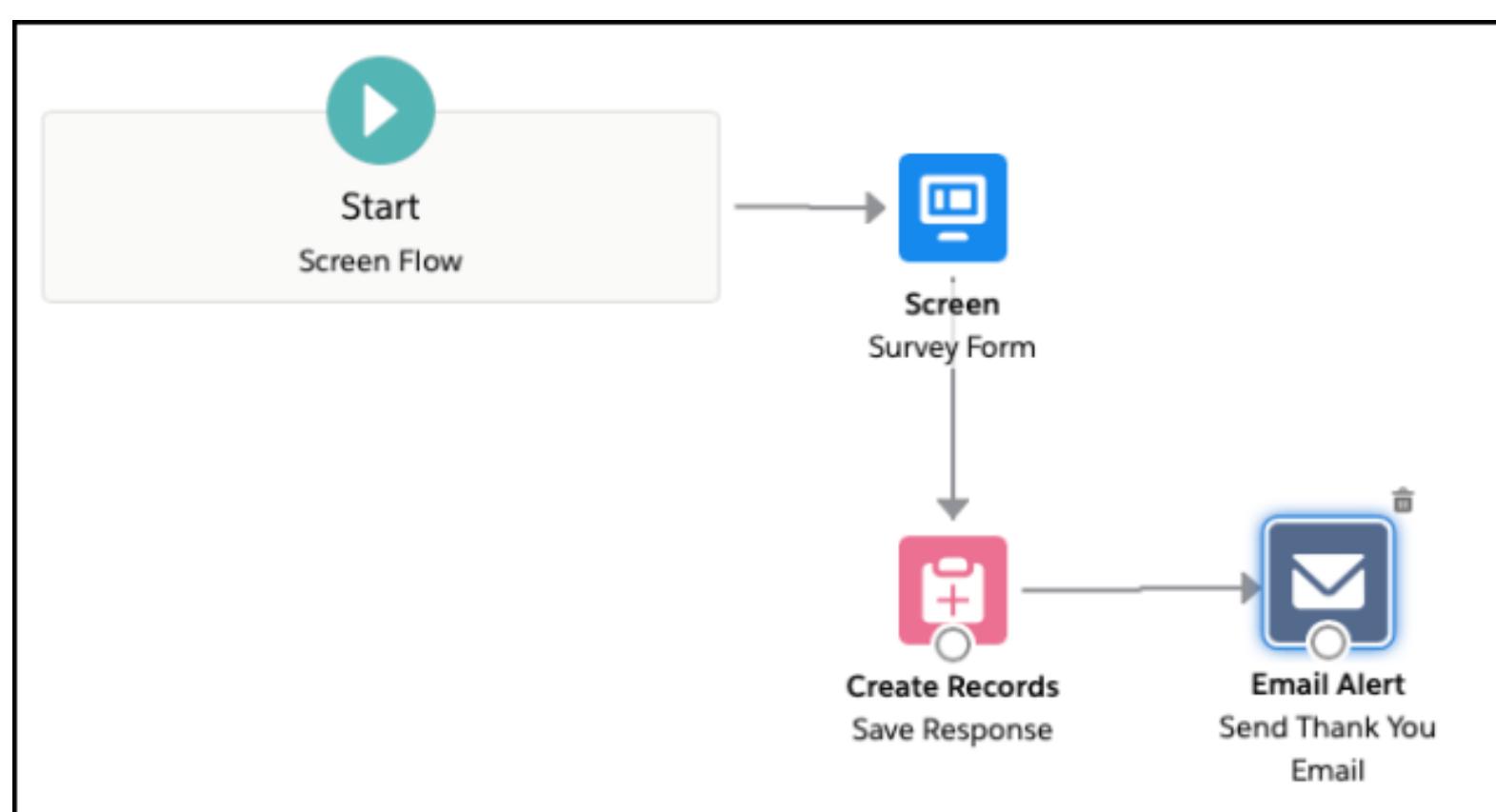
3. In the **Action** box, type **Survey – Thank You Email**.
4. Clicks on the **Survey – Thank You Email** email alert.
5. Click **Done**.

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	
<input type="text"/>	
Set Input Values	
A3 *Record ID	(!Save_Response)
<input type="button" value="Cancel"/> <input type="button" value="Done"/>	

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



1. Click **Save**.
2. Enter **Flow Label** the **API Name** will auto-populate.

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

Save as

A New Version A New Flow

* Flow Label Survey * Flow API Name Survey

Description

Hide Advanced

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

* Type Screen Flow

* API Version for Running the Flow 51

Interview Label i
Insert a resource... 🔍
Survey {!\$Flow.CurrentDateTime}

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

Status: Active Type: Screen Flow Version Number: 2

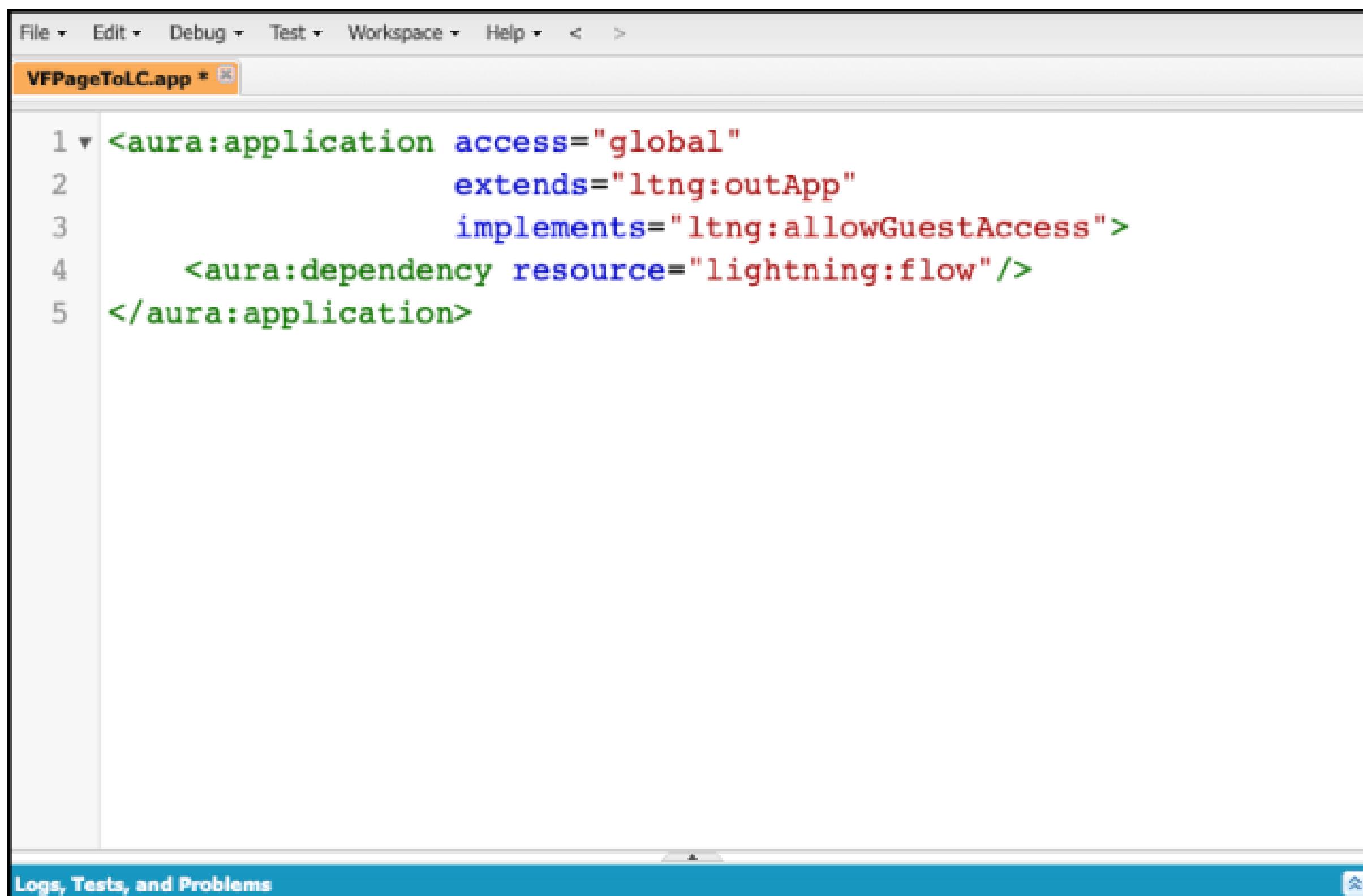
Cancel Save

The screenshot shows the 'Save as' dialog for a new flow. The 'Flow Label' is 'Survey' and the 'Flow API Name' is also 'Survey'. The 'Description' field is empty. Under 'How to Run the Flow', the context is set to 'User or System Context—Depends on How Flow is Launched'. The 'Type' is 'Screen Flow' and the 'API Version for Running the Flow' is '51'. In the 'Interview Label' section, the placeholder 'Insert a resource...' contains the formula 'Survey {!\$Flow.CurrentDateTime}'. At the bottom, it shows the last modified date as '12/21/2020, 4:54 PM by Rakesh Gupta', the status is 'Active', the type is 'Screen Flow', and the version number is '2'. There are 'Cancel' and 'Save' buttons at the bottom right.

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

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

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



The screenshot shows the Salesforce IDE interface with the title bar "File ▾ Edit ▾ Debug ▾ Test ▾ Workspace ▾ Help ▾ < >". A tab labeled "VFPageToLC.app * [S]" is selected. 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 status bar at the bottom displays "Logs, Tests, and Problems".

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

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

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

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

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

The screenshot shows the Visualforce Page Editor interface. At the top, there's a header with 'Visualforce Page Survey' and a 'Help for this Page' link. Below the header is a 'Page Edit' toolbar with buttons for 'Save', 'Quick Save', 'Cancel', 'Where is this used?', 'Component Reference', and 'Preview'. Underneath the toolbar is a 'Page Information' section with fields for 'Label' (set to 'Survey'), 'Name' (set to 'Survey'), and 'Description'. There are also checkboxes for 'Available for Lightning Experience, Experience Builder sites, and the mobile app' (checked) and 'Require CSRF protection on GET requests' (unchecked). The main area is titled 'Visualforce Markup' and 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="alda-scope">
        <div id="flowContainer" />
        <script>
            var statusChange = function (event) {
                if(event.getParam("status") === "FINISHED") {
                    var outputVariables = event.getParam("outputVariables");
                    var key;
                    for(key in outputVariables) {
                        if(outputVariables[key].name === "myOutput") {
                            ...
                        }
                    }
                }
            };
            $Lightning.use("c:VPPageToLC", function() {
                $Lightning.createComponent("lightning:flow", {"onstatuschange":statusChange},
                    "flowContainer",
                    function (component) {
                        component.startFlow("Survey", );
                    }
                );
            });
        </script>
    </body>

```

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

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

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

Site Edit

Save Cancel

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

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

Proof of Concept

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

The form has the following fields:

- Name
 - First Name: Alok
 - Last Name: Sinfal
- *Email: [Redacted]
- *Rating: 5
- *Comment: Awesome Blog

At the bottom right is a blue "Next" button.

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

