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Salesforce Developer(Course)
Assignment No 1 to 4

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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 'New Custom Object' page in the Salesforce Setup. The top navigation bar includes 'Setup', 'Home', 'Object Manager', and a search bar labeled 'Search Setup'. The main title is 'New Custom Object'. A message 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](#)'. Below this is the 'Custom Object Definition Edit' section. Under 'Custom Object Information', the 'Label' field is set to 'college' and the 'Plural Label' field is set to 'Colleges'. There is a checkbox for 'Starts with vowel sound'. The 'Object Name' field is also set to 'college'. The 'Description' field is empty. Under 'Context-Sensitive Help Setting', the 'Open the standard Salesforce.com Help & Training window' option is selected. The 'Content Name' dropdown is set to 'None'. In the 'Enter Record Name Label and Format' section, the 'Record Name' field is set to 'College Name' and the 'Example' field is set to 'Account Name'. The 'Data Type' dropdown is set to 'Text'. The 'Optional Features' section contains several checkboxes: 'Allow Reports', 'Allow Activities', 'Track Field History', 'Allow in Chatter Groups', and 'Enable Licensing'. Under 'Object Classification', there are three checked checkboxes: 'Allow Sharing', 'Allow Bulk API Access', and 'Allow Streaming API Access'. The 'Deployment Status' section shows 'Deployed' is selected. The 'Search Status' section has 'Allow Search' checked. The 'Object Creation Options (Available only when custom object is first created)' section has two unchecked checkboxes: 'Add Notes and Attachments related list to default page layout' and 'Launch New Custom Tab Wizard after saving this custom object'. At the bottom of the page are 'Save', 'Save & New', and 'Cancel' buttons.

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

Setup
Home Object Manager

 Search Setup

SETUP
Object Manager

New Custom Object

[Help for this Page](#)

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

Custom Object Definition Edit
[Save](#) [Save & New](#) [Cancel](#)

Custom Object Information

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

Label	<input type="text" value="department"/>	Example: Account
Plural Label	<input type="text" value="departments"/>	Example: Accounts
Starts with vowel sound	<input type="checkbox"/>	

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

Object Name	<input type="text" value="department"/>	Example: Account
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Description

Context-Sensitive Help Setting

<input checked="" type="radio"/> Open the standard Salesforce.com Help & Training window
<input type="radio"/> Open a window using a Visualforce page

Content Name

<input type="checkbox"/> 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	<input type="text" value="Department Name"/>	Example: Account Name
-------------	--	-----------------------

Data Type

<input type="button" value="Text"/>

Optional Features

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

Object Classification

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

Allow Sharing
 Allow Bulk API Access
 Allow Streaming API Access

Deployment Status

In Development
 Deployed

Search Status

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

Allow Search

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

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

[Save](#) [Save & New](#) [Cancel](#)

Step 2: Create a Master-Detail Relationship

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

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

10. Click "Next" and "Save" to create the relationship.

The image contains two screenshots of the Salesforce Setup interface, illustrating the process of creating a Master-Detail relationship between the College__c and CDepartment objects.

Screenshot 1: Object Manager - CDepartment

This screenshot shows the 'Object Manager' page for the 'CDepartment' object. The left sidebar lists various configuration tabs: 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 panel displays the 'Details' section for the 'CDepartment' object, which includes fields for Description, API Name (set to 'CDepartment__c'), Singular Label ('CDepartment'), Plural Label ('CDepartments'), and several status and history fields. At the top right of the main panel are 'Edit' and 'Delete' buttons.

Screenshot 2: New Relationship - Step 3

This screenshot shows the 'New Relationship' wizard, Step 3 of 6. It is titled 'Step 3. Enter the label and name for the lookup field'. The left sidebar is identical to the first screenshot. The main panel contains fields for 'Field Label' (set to 'college'), 'Field Name' (set to 'college'), 'Description', and 'Help Text'. Below these, under 'Sharing Setting', there are two radio button options: 'Read Only' (selected) and 'ReadWrite'. A note states: 'Select the minimum access level required on the Master record to create, edit, or delete related Detail records.' Under 'Allow reparenting', there are two checkboxes: 'Child records can be reparented to other parent records after they are created' (unchecked) and 'Add this field to existing custom report types that contain this entity' (checked). At the bottom right are 'Previous', 'Next', and 'Cancel' buttons.

The top screenshot shows the 'New Relationship' wizard for the 'CDepartment' object. Step 2, 'Choose the related object', is displayed with 'college' selected in the 'Related To' dropdown. The bottom screenshot shows the 'New Custom Field' wizard for the 'CDepartment' object. Step 1, 'Choose the field type', is displayed with 'Roll Up Summary' selected under 'Data Type'. Both screenshots include the standard Salesforce header with tabs like 'Setup', 'Home', and 'Object Manager'.

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.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
college	college__c	Master-Detail(college)		<input checked="" type="checkbox"/>
Created By	CreatedById	Lookup(User)		<input checked="" type="checkbox"/>
Department Name	Name	Text(80)		<input checked="" type="checkbox"/>
Last Modified By	LastModifiedById	Lookup(User)		<input checked="" type="checkbox"/>

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

Field Label	Total count
Date 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.

Setup > OBJECT MANAGER college

Details

New Custom Field

Step 4. Establish field-level security Step 4 of 5

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"/>

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.

Setup > OBJECT MANAGER college

Details

New Custom Field

Step 3. Define the summary calculation Step 3 of 5

Select Object to Summarize

Master Object: college
Summarized Object: CDDepartments

Select Roll-Up Type

COUNT
 SUM
 MIN
 MAX

Field to Aggregate: None

Filter Criteria

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

Setup > OBJECT MANAGER college

Details

New Custom Field

Step 2. Enter the details Step 2 of 5

Field Label:	Total count
Field Name:	Total_count
Description:	(empty)
Help Text:	(empty)

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

Setup > OBJECT MANAGER college

college New Custom Field

Step 1. Choose the field type

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

Data Type

Select one of the data types below:

- None Selected
- Auto Number
- Formula
- Roll Up Summary
- Lookup Relationship
- Master-Detail Relationship
- External Lookup Relationship
- Boolean

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

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

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.

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

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

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

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

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

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

Step 1

Next Cancel

Setup > OBJECT MANAGER college

Fields & Relationships

4 Items, Sorted by Field Label

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

Step 4: Create a Lightning App

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

10. Assign the app to users or profiles.

11. Test the app with the assigned users.

The screenshot shows the Salesforce Setup interface with the 'Tabs' tab selected under 'User Interface'. The main content area is titled 'New Custom Object Tab' and displays 'Step 2. Add to Profiles'. It asks to choose user profiles for the new custom tab. A radio button is selected for 'Apply one tab visibility to all profiles [Default On]'. Below this, a list of profiles is shown on the left, and their corresponding 'Tab Visibility' dropdown menus are on the right. Most dropdowns show 'Default On'. At the bottom right are 'Previous', 'Next', and 'Cancel' buttons.

The screenshot shows the Salesforce Setup interface with the 'Tabs' section selected. The main title is 'New Custom Object Tab'. The sub-step is 'Step 1. Enter the Details'. The user has selected the object 'college' and chosen the tab style 'Jewel'. There is a note about choosing a splash page custom link, which is currently set to 'None'. A description field is present but empty. Navigation buttons 'Next' and 'Cancel' are at the bottom right.

The screenshot shows the 'Step 3. Add to Custom Apps' page. It lists various custom apps and standard objects that can be included in the new tab. Most items have a checked checkbox next to them. A specific note at the bottom says 'Append tab to users' existing personal customizations'. Navigation buttons 'Previous', 'Save', and 'Cancel' are at the bottom right.

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

New Custom Object Tab

Step 1. Enter the Details

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

Object	CDDepartment
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

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	✓ ▾

Custom Tabs

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

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

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

New Lightning App

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

* App Name

* Developer Name

Description

App Branding

Image Primary Color Hex Value

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

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.

organization's requirements.

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

History

New college

* = Required Information

Information

college Name: kiot

Owner: krishna s

phone: 9087116402

Email: kiot@ac.in

Location

Latitude: 90

Longitude: 80

Cancel Save & New Save

The screenshot shows a web-based application interface. At the top, there is a navigation bar with links for "My college", "colleges", "CDepartments", "student", and "Content". A search bar is located at the top right. Below the navigation, a header bar displays "CDepartments Recently Viewed" with a refresh icon. A message indicates "1 item • Updated a few seconds ago". The main content area shows a table with one row, labeled "Department Name" and containing the value "cse". On the far right of the table are standard edit and delete icons. The bottom of the screen features a toolbar with various icons.

① History

This screenshot shows a "New CDepartment" form overlaid on the previous list view. The title "New CDepartment" is at the top. A note "To unpin, pin another list view" is visible above the form. The form itself has a section titled "Information" with several fields: "Department Name" (set to "information technology"), "college" (set to "kiot"), "email" (set to "it@gmail.com"), "phone" (set to "897577568"), "hod name" (set to "arul"), and an empty "about" field. A note "*= Required information" is located near the top right of the form. At the bottom are three buttons: "Cancel", "Save & New", and "Save". The background shows the same list view of departments as the first screenshot.

① History

My college colleges CDdepartments student Content

Search... ★ + ? ⚡ 🔍

CDepartment information technology

New Contact Edit New Opportunity

Related Details

Department Name
information technology

college
kiot

email
it@gmail.com

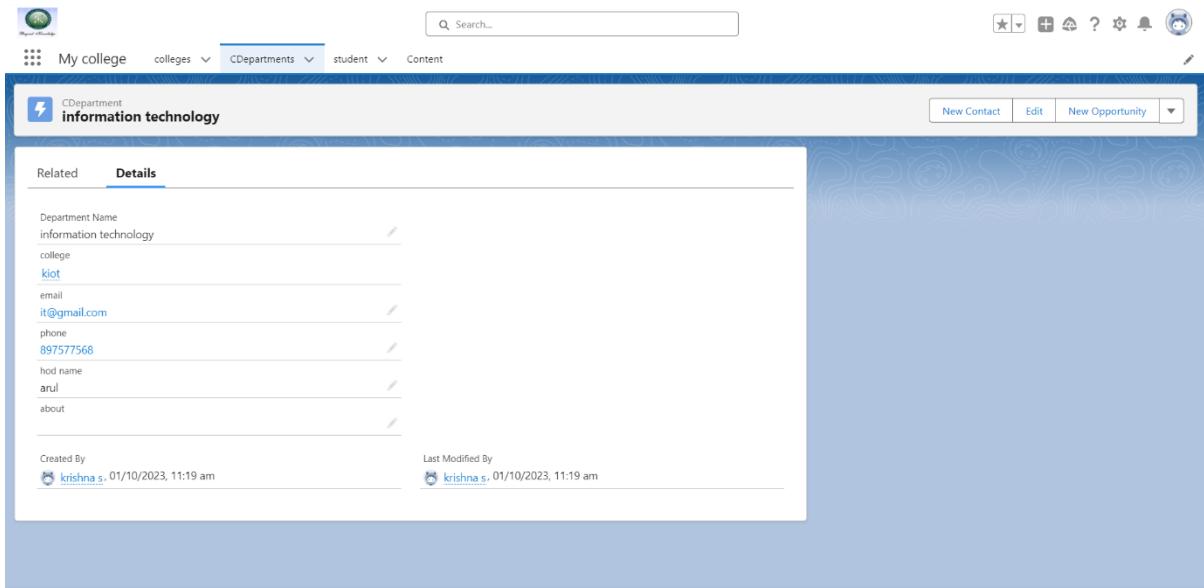
phone
897577568

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 CDdepartments student Content

Search... ★ + ? ⚡ 🔍

college kiot

New Contact Edit New Opportunity

Related Details

college Name
kiot

Total count
1

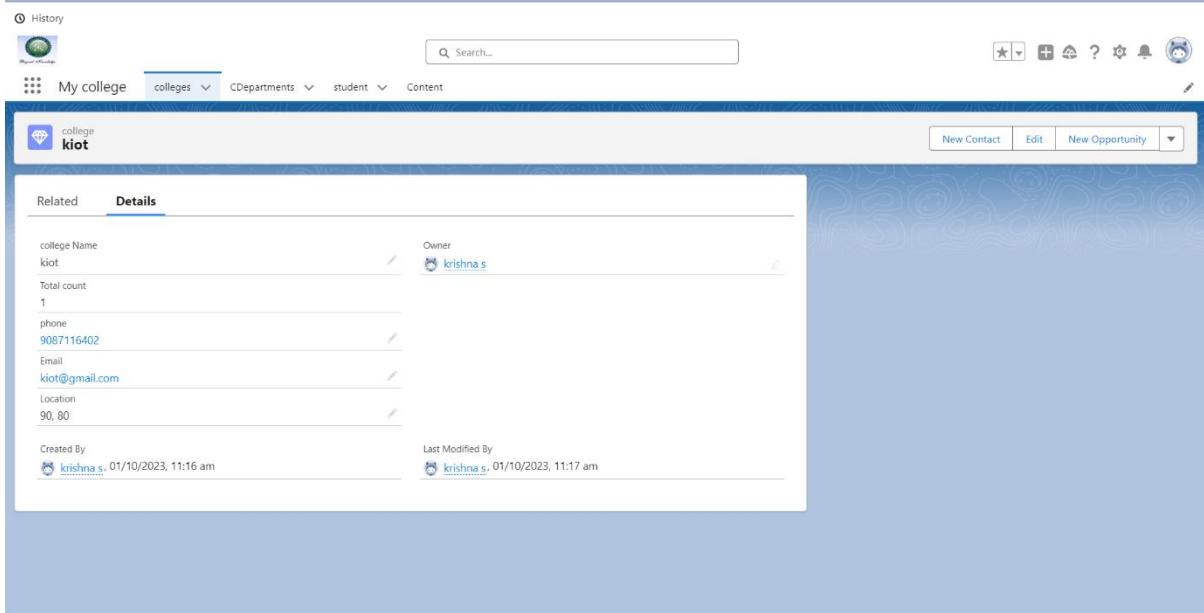
phone
9087116402

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 CDdepartments student Content

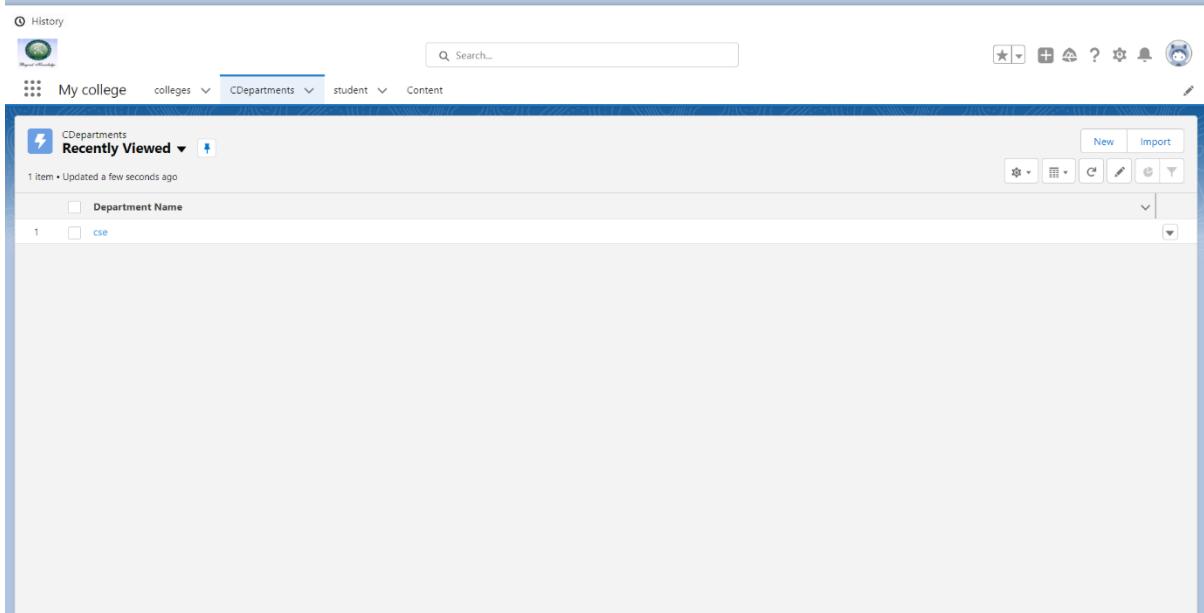
Search... ★ + ? ⚡ 🔍

CDepartments Recently Viewed

1 item • Updated a few seconds ago

Department Name
cse

New Import



History

My college colleges CDepartments student Content

Recently Viewed ▾

1 item • Updated a few seconds ago

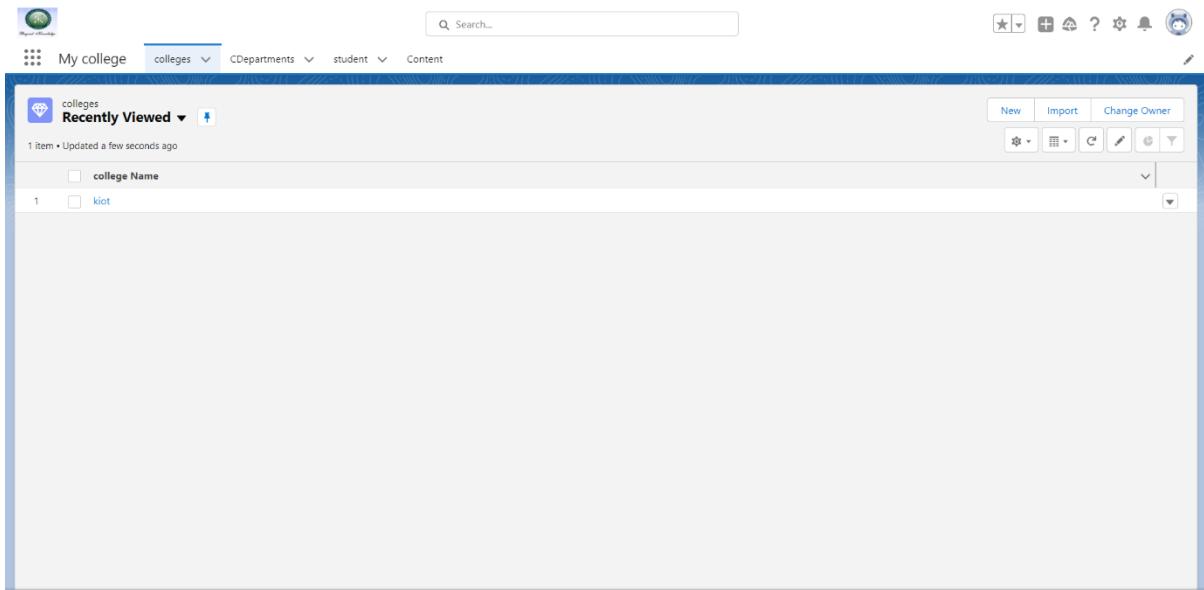
college Name

kiot

New Import Change Owner

Search...

History



My college colleges CDepartments student Content

college kiot

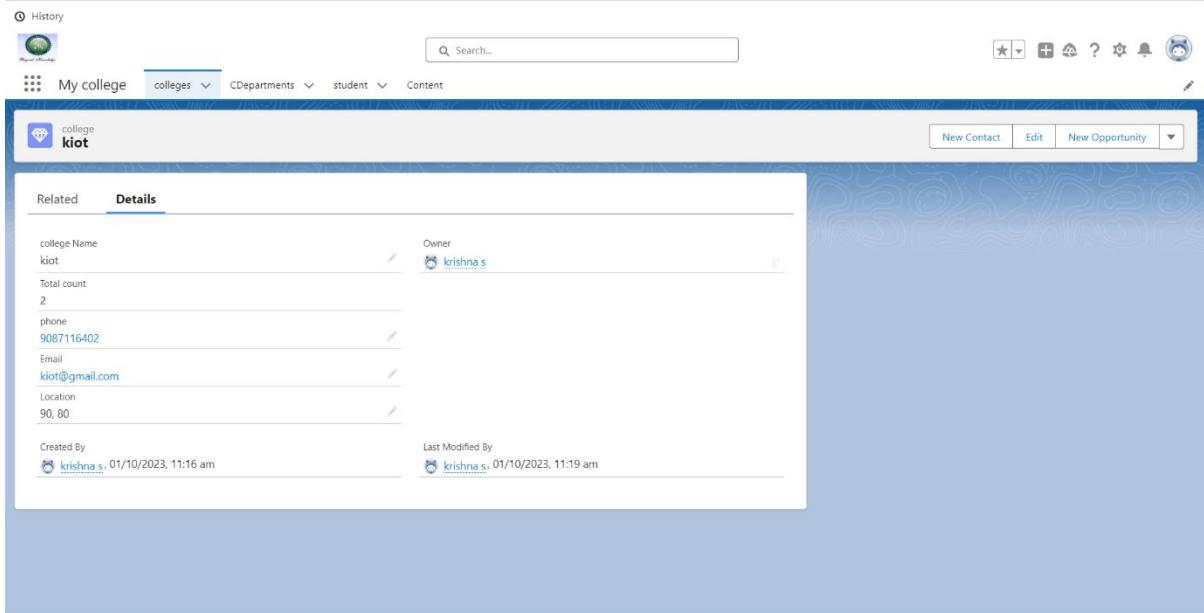
New Contact Edit New Opportunity

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 image consists of two vertically stacked screenshots of the Salesforce Setup Profiles page. Both screenshots show a list of profiles with columns for Action, Profile Name, User License, and Custom status.

Screenshot 1 (Top): This screenshot shows the creation of the "Chatter External User" profile. The "Custom" column for this profile is checked. Other profiles listed include Analytics Cloud Integration User, Analytics Cloud Security User, Authenticated Website, Authenticated Website, Chatter External User (which is selected), 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 "Custom" column for most of these profiles is unchecked.

Action	Profile Name	User License	Custom
<input type="checkbox"/>	Analytics Cloud Integration User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/>	Analytics Cloud Security User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/>	Authenticated Website	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/>	Authenticated Website	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/>	Chatter External User	Chatter External	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Chatter Free User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/>	Chatter Moderator User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/>	Contract Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/>	Cross Org Data Proxy User	XOrg Proxy User	<input type="checkbox"/>
<input type="checkbox"/>	Custom Marketing Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Custom Sales Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Custom Support Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Customer Community Login User	Customer Community Login	<input type="checkbox"/>
<input type="checkbox"/>	Customer Community Plus Login User	Customer Community Plus Login	<input type="checkbox"/>
<input type="checkbox"/>	Customer Community Plus User	Customer Community Plus	<input type="checkbox"/>
<input type="checkbox"/>	Customer Community User	Customer Community	<input type="checkbox"/>
<input type="checkbox"/>	Customer Portal Manager Custom	Customer Portal Manager Custom	<input type="checkbox"/>

Screenshot 2 (Bottom): This screenshot shows the creation of the "Salesforce API Only System Integrations" profile. The "Custom" column for this profile is checked. Other profiles listed include salesmanager, Silver Partner User, Solution Manager, Standard Platform User, Standard User, and System Administrator. The "Custom" column for most of these profiles is checked.

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

The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected. On the left, the navigation sidebar includes 'Setup Home', 'Service Setup Assistant', 'Multi-Factor Authentication Assistant', 'Hyperforce Assistant', 'Release Updates', 'Lightning Experience Transition Assistant', 'Salesforce Mobile App', 'Lightning Usage', 'Optimizer', and 'ADMINISTRATION' sections with 'Users', 'Permission Set Groups', 'Permission Sets', and 'Profiles' sub-sections. The 'Profiles' sub-section is currently active. The main content area displays the 'Clone Profile' page, which prompts the user to enter the name of the new profile. A message at the top states 'You must select an existing profile to clone from.' Below this, there are three options: 'Existing Profile' (Standard Platform User), 'User License' (Salesforce Platform), and 'Profile Name' (which is empty). At the bottom of the form are 'Save' and 'Cancel' buttons.

This screenshot is identical to the one above, but the 'Profile Name' field contains the value 'Manager'. All other elements, including the sidebar navigation and the overall layout, remain the same.

Salesforce Developer Session | 128 Top Hits 2023 | Object Manager | Salesforce | Profiles | Salesforce | Downloads | Finish update

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Hyperforce Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

ADMINISTRATION

Users

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

SETUP Profiles

Manager

Profile Manager

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

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

Log In Pages | Enabled Apex Class Access | Enabled Visualforce Page Access | Enabled External Data Source Access | Enabled Named Credential Access | Enabled External Credential Principal Access | Enabled Custom Metadata Type Access | Enabled Custom Setting Definition Access | Enabled Flow Access | Enabled Service Presence Status Access | Enabled Custom Permissions

Profile Detail

Name	Manager	Custom Profile	<input checked="" type="checkbox"/>
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
Email Application	Global Layout [View Assignment]	Order [View Assignment]
Home Page Layout	Home Page Default [View Assignment]	Order Product [View Assignment]
Account	Account Layout [View Assignment]	Payment [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	Payment Authorization [View Assignment]
Appointment Invitation	Appointment Invitation Layout [View Assignment]	Payment Authorization Adjustment [View Assignment]
Asset	Asset Layout [View Assignment]	Payment Gateway [View Assignment]

Salesforce Developer Session | 128 Top Hits 2023 | Object Manager | Salesforce | Profiles | Salesforce | Downloads | Finish update

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Hyperforce Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

ADMINISTRATION

Users

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

SETUP Profiles

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 checked="" type="radio"/>	Platform (standard__Platform)	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>
App Launcher (standard__AppLauncher)	<input type="checkbox"/>	<input checked="" type="radio"/>	WDC (standard__Work)	<input type="checkbox"/>	<input checked="" type="radio"/>
slot (slot)	<input checked="" type="checkbox"/>	<input type="radio"/>			

Service Provider Access

Tab Settings

Overwrite users' personal tab customizations

Standard Tab Settings

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

Salesforce Developer Session | 128 Top Hits 2023 | Object Manager | Salesforce | Profiles | Salesforce | Downloads | Finish update

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

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

Custom Object Permissions

	Basic Access	Create	Edit	Delete	View All	Data Administration
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

Salesforce Developer Session | 128 Top Hits 2023 | Object Manager | Salesforce | Profiles | Salesforce | Downloads | Finish update

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

Contact Point Addresses Contact Point Consents Contact Point Emails Individuals Locations Party Consents Push Topics Sellers Streaming Channels User External Credentials

Custom Object Permissions

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

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

Password Policies User passwords expire in: 90 days Enforce password history: 3 passwords remembered Minimum password length: 8 Password complexity requirement: Must include alpha and numeric characters Password question requirement: Cannot contain password Maximum invalid login attempts: 10 Lockout effective period: 15 minutes

Salesforce Developer Session | Object Manager | Salesforce | Profiles | Salesforce | Downloads | Finish update

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

Custom Object Permissions

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

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

User passwords expire in:	90 days
Enforce password history:	3 passwords remembered
Minimum password length:	8
Password complexity requirement:	Must include alpha and numeric characters
Password question requirement:	Cannot contain password
Maximum invalid login attempts:	10
Lockout effective period:	15 minutes
Obfuscate secret answer for password resets:	<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 | Object Manager | Salesforce | Profiles | Salesforce | Downloads | Finish update

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

Custom Object Permissions

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

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

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

Salesforce Developer Session | 128 Top Hits 2023 | Object Manager | Salesforce | Users | Salesforce | Downloads | Finish update

Users

All Users

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

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

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

Action	Full Name	Alias	Username	Role	Active	Profile
Edit Login	Adanna_Diva	dadan	test_diva_pas_4w8byt65wtk_ts2qrgstttxox_3qj8ofwvzwns_hi43tkzw6mea@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	JMS User
Edit	Chatter Expert	Chatter	chatty_00d5f00000bc3skkeab_lo00fwmqjite@chatter.salesforce.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Chatter Free User
Edit Login	Elington_Amelia	elli	amelia_elington_146kxc9p000ih_dlcwyodcu4wh_hnbdemwytheawguctor1dalv@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Standard Platform User
Edit	S_GOPAL	GS	kot520@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	System Administrator
Edit	User Integration	Integ	integration@00d5f00000bc3skkeab.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Integration User
Edit	User_Security	sec	insightssecurity@00d5f00000bc3skkeab.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Security User

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

Salesforce Developer Session | 128 Top Hits 2023 | Object Manager | Salesforce | Users | Salesforce | Downloads | Finish update

New User

User Edit

General Information

First Name	<input type="text"/>	Role	<None Specified>
Last Name	<input type="text"/>	User License	Salesforce Integration
Alias	<input type="text"/>	Profile	Salesforce API Only System Integrations
Email	<input type="text"/>	Active	<input checked="" type="checkbox"/>
Username	<input type="text"/>	Marketing User	<input type="checkbox"/>
Nickname	<input type="text"/>	Office User	<input type="checkbox"/>
Title	<input type="text"/>	Knowledge User	<input type="checkbox"/>
Company	<input type="text"/>	Flow User	<input type="checkbox"/>
Department	<input type="text"/>	Service Cloud User	<input type="checkbox"/>
Division	<input type="text"/>	Site.com Contributor User	<input type="checkbox"/>
		Site.com Publisher User	<input type="checkbox"/>
		WDC User	<input type="checkbox"/>
		Data.com User Type	-None-
		Data.com Monthly Addition Limit	Default Limit (300)
		Accessibility Mode (Classic Only)	<input type="checkbox"/>
		High-Contrast Palette on Charts	<input type="checkbox"/>
		Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>
		Debug Mode	<input type="checkbox"/>

Salesforce Developer Session | 128 Top Hits 2023 | Object Manager | Salesforce | Users | Salesforce | Downloads | Finish update

Setup Home Object Manager

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

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

PLATFROM TOOLS
Apps
Features Settings

Search Setup

Users

New User

User Edit Save Save & New Cancel

General Information

First Name	sowmya
Last Name	bala
Alias	sbala
Email	2k20ce179@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

Salesforce Developer Session | 128 Top Hits 2023 | Object Manager | Salesforce | Users | Salesforce | Downloads | Finish update

Setup Home Object Manager

Hyperforce Assistant
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ADMINISTRATION
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PLATFROM TOOLS
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Search Setup

Users

User SOWMYA bala

User Profile Help for this Page

User Detail

Name	sowmya bala	Role	Salesforce Platform
Alias	sbala	User License	Manager
Email	2k20ce179@kiot.ac.in [Verify]	Profile	
Username	2k21it@kiot.ac.in	Active	<input checked="" type="checkbox"/>
Nickname	User169616771282564526	Marketing User	<input type="checkbox"/>
Title	worker	Offline User	<input type="checkbox"/>
Company	kiot bank	Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	Mobile Push Registrations	<input type="checkbox"/>
Language	English	Data.com User Type	<input type="checkbox"/>
Delegated Approver		Accessibility Mode (Classic Only)	<input type="checkbox"/>
Manager	Only if I am an approver	Debug Mode	<input type="checkbox"/>
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/>
App Registration: One-Time Password Authenticator		Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>
App Registration: Salesforce Authenticator		Salesforce CRM Content User	<input checked="" type="checkbox"/>

Edit Sharing Reset Password Login Freeze

Help for this Page

Gmail

Compose

Inbox 5,318

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

7:13 PM (0 minutes ago)

Active

KNOWLEDGE CENTER

Welcome to Salesforce!

Click below to verify your account.

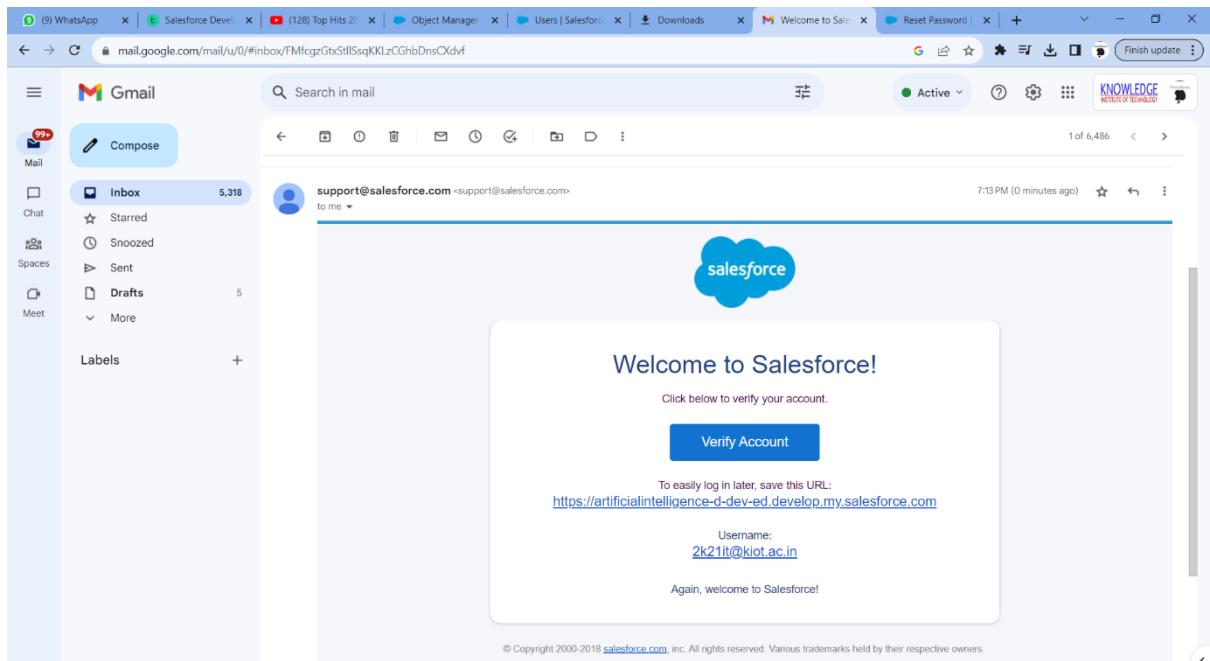
Verify Account

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

Username:
2k21it@kiot.ac.in

Again, welcome to Salesforce!

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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

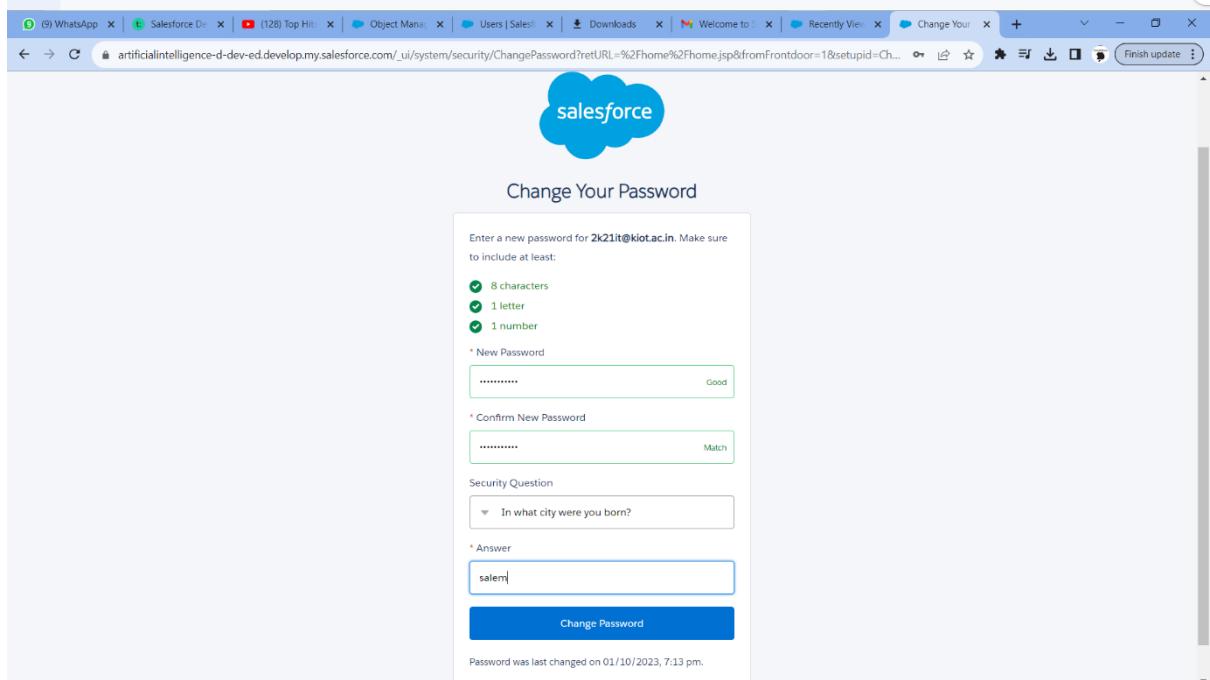
* Confirm New Password
..... Match

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

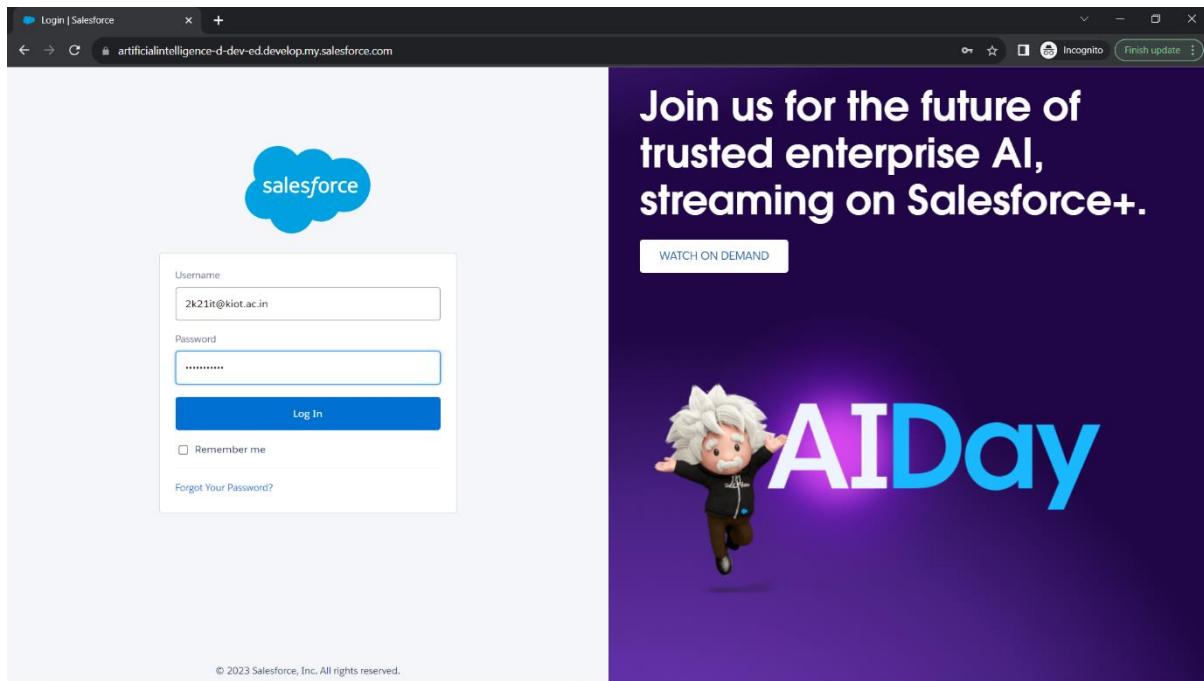
artificialintelligence-d-dev-ed.develop.my.salesforce.com

Incognito Finish update

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

WATCH ON DEMAND

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The screenshot shows the Salesforce login interface on the left and a promotional banner for "AI Day" on the right. The banner features a cartoon character of a man with white hair running towards the right, with the text "Join us for the future of trusted enterprise AI, streaming on Salesforce+" above him and "AI Day" in large blue letters below.

Recently Viewed | Bank | Salesforce

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

Incognito Finish update

kiot

Bank customers Home

Search...

Recently Viewed

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

Bank Name

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

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

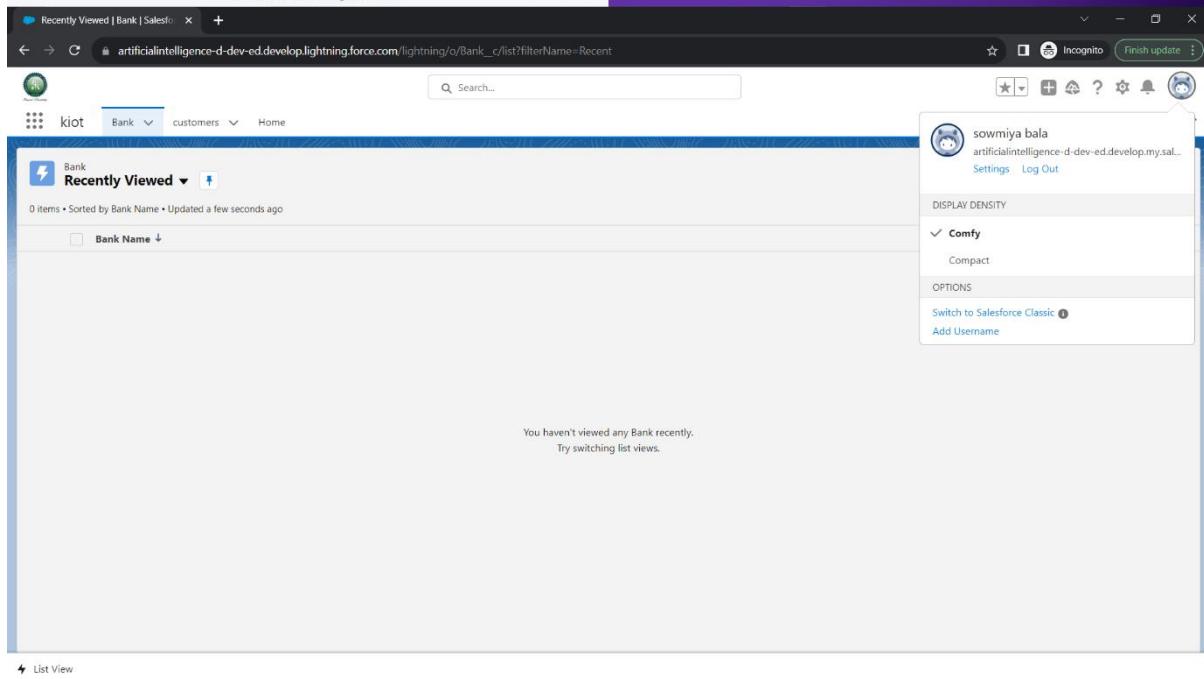
DISPLAY DENSITY

✓ Comfy Compact

OPTIONS

Switch to Salesforce Classic Add Username

List View



The screenshot shows the Salesforce Lightning interface for the "Recently Viewed" list. It includes a navigation bar with "kiot", "Bank", "customers", and "Home" links. A search bar is at the top right. The main area displays a message stating "You haven't viewed any Bank recently." with a "Try switching list views." link. On the right, there is a user profile sidebar for "sowmiya bala" and a "DISPLAY DENSITY" dropdown set to "Comfy".

New Bank | Salesforce

Recently Viewed ▾

0 items • Updated a few seconds ago

Bank Name

New Bank

Information

* = Required Information

Bank Name: boi

Owner: sowmiya bala

Phone No.: 0897754534

Cancel Save & New Save

Bank customers Home

Search...

Incognito Finish update

New customer | Salesforce

Recently Viewed ▾

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

customer Name

New customer

Information

* = Required Information

customer Name: madhu

Bank: boi

Cancel Save & New Save

Bank customers Home

Search...

Incognito Finish update

madhu | customer | Salesforce

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/r/customer_c/a025j00000f0YFaAM/view

customer madhu was created.

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

Salesforce Developer Session 2 | (128) Top Hits 2023 | New Po | Profiles | Salesforce

Welcome to Salesforce: Verify your profile

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

Profiles

All Profiles | Edit | Delete | Create New View

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"/>

1-7 of 7 0 Selected

javascript:actUp('27%2F_u%2fperms%2Fu%2Fprofile%2Fe%2Fd%3D00e5j000003uvku%26setupid%3DEnhancedProfiles%26retURL%3D%252F0o%253Ffe%253D008sj00000c7U%2526roleIdIndex%253D18%2526page%253D1%2526editp%253D0p1%26editp%...

Salesforce Developer Session 2 | (128) Top Hits 2023 | Profiles | Salesforce | Welcome to Salesforce: Verify your profile

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

Clone Profile

You must select an existing profile to clone from.

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

Save Cancel

Help for this Page

Salesforce Developer Session 2 | (128) Top Hits 2023 | Profiles | Salesforce | Welcome to Salesforce: Verify your profile

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

Profile salesmanager

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

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

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

Profile Detail

Name	salesmanager
User License	Salesforce Platform
Description	
Created By	GOPAL S. 01/10/2023, 7:19 pm
Modified By	GOPAL S. 01/10/2023, 7:19 pm

Custom Profile

Page Layouts

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

Help for this Page

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

- Header:** The top navigation bar includes tabs for WhatsApp, Salesforce Developer Session 2, Top Hits 2023, Profiles | Salesforce, and Welcome to Salesforce: Verify your account.
- Left Sidebar:** The sidebar under the "Setup" tab lists various administrative sections: 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 (which is currently selected), Public Groups, Queues, Roles, User Management Settings, and Users.
- Current Page:** The main content area is titled "Profiles" and shows the "salesmanage" profile being edited. The profile edit form includes fields for Name (salesmanage), User License (Salesforce Platform), and Description (empty). A "Custom Profile" checkbox is checked. Below this is a "Custom App Settings" section with a table:

	Visible	Default		Visible	Default
Analytics Studio (standard__Insights)	<input type="checkbox"/>	<input checked="" type="radio"/>	Platform (standard__Platform)	<input type="checkbox"/>	<input checked="" type="radio"/>
App Launcher (standard__AppLauncher)	<input type="checkbox"/>	<input checked="" type="radio"/>	WDC (standard__Work)	<input type="checkbox"/>	<input checked="" type="radio"/>
kiot (kiot)	<input checked="" type="checkbox"/>	<input type="radio"/>			
- Other Sections:** Below the app settings are sections for "Service Provider Access", "Tab Settings" (with a checkbox for "Overwrite users' personal tab customizations"), and "Standard Tab Settings" (with tabs for Home, Default On, Accounts, Learning, and Libraries).

The screenshot shows the Salesforce Setup interface for managing Profiles. The left sidebar is titled 'Setup' and includes sections for 'Quick Find', 'Setup Home', 'Service Setup Assistant', 'Multi-Factor Authentication Assistant', 'Hyperforce Assistant', 'Release Updates', 'Lightning Experience Transition Assistant', 'Salesforce Mobile App', 'Lightning Usage', and 'Optimizer'. Under 'ADMINISTRATION', the 'Profiles' section is selected and highlighted in blue. The main content area is titled 'Profiles' and contains the following sections:

- Contact Front Limits:** A row of checkboxes for 'User External Credentials'.
- Custom Object Permissions:** A table showing permissions for 'Bank' and 'customers' objects across 'Basic Access' and 'Data Administration' categories.
- Session Settings:** Set 'Session Times Out After' to '2 hours of inactivity' and 'Session Security Level Required at Login' to 'None'.
- Password Policies:** Configuration for password expiration, history, length, complexity, and other security requirements.

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

SEARCH Search Setup

Profiles

Custom Object Permissions

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

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

User passwords expire in:	90 days
Enforce password history:	3 passwords remembered
Minimum password length:	8
Password complexity requirement:	Must include alpha and numeric characters
Password question requirement:	Cannot contain password
Maximum invalid login attempts:	10
Lockout effective period:	15 minutes
Obfuscate secret answer for password 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 | Users | Salesforce | Welcome to Salesforce: Verify your...

Setup Home Object Manager

SEARCH Search Setup

Users

New User

User Edit

General Information

First Name: (Required)

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:

Office 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

Save | Save & New | Cancel

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

Setup Home Object Manager

Search Setup

User Management Settings

Users

General Information

First Name: madhu
Last Name: D
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: salesmanager
Active:

Marketing User:
Offline User:
Knowledge User:
Flow User:
Service Cloud User:
Site.com Contributor:
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:

New User

User Edit Save Save & New Cancel

Help for this Page

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

Setup Home Object Manager

Search Setup

User Management Settings

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

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

Setup Home Object Manager

Search Setup

Users

Mailing Address

Street: 4/194, ariyampalayam, uthamasolapuram ..
City: SALEM
Zip/Postal Code: 636308
State/Province: TAMIL NADU
Country: India

Single Sign On Information

Federation ID: [empty]

Locale Settings

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

Approver Settings

Delegated Approver: [empty]
Manager: [empty]
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 user... | Finish update

Setup Home Object Manager

Search Setup

Users

User madhu b

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

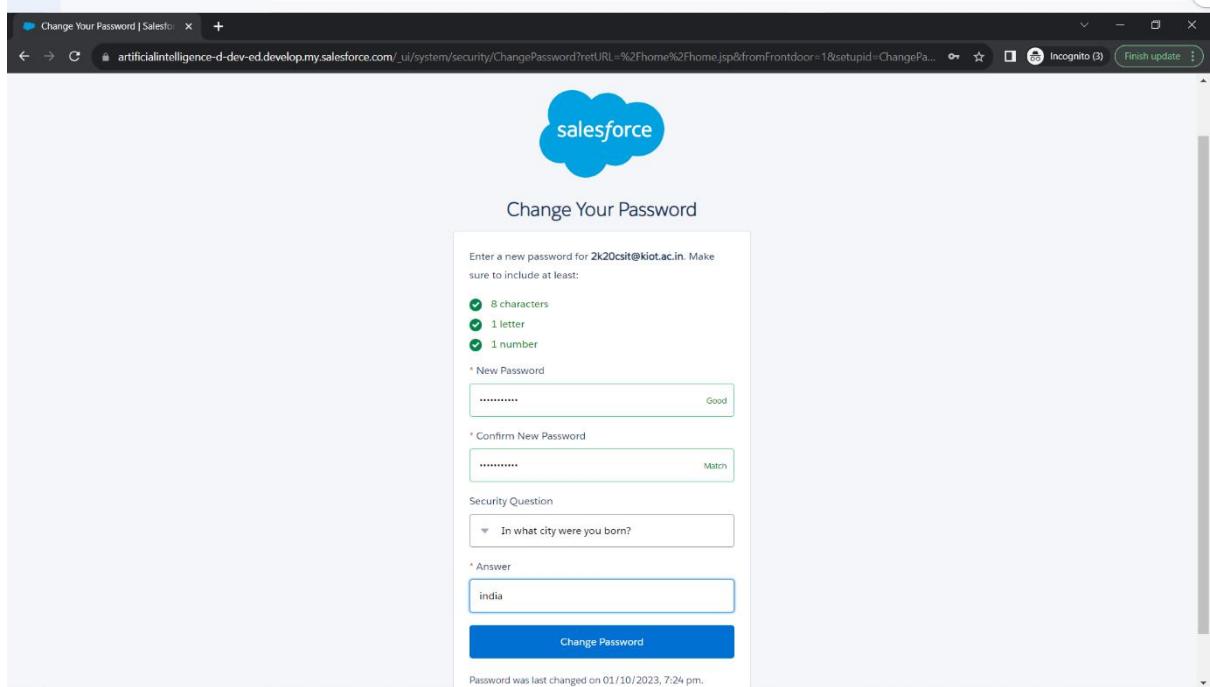
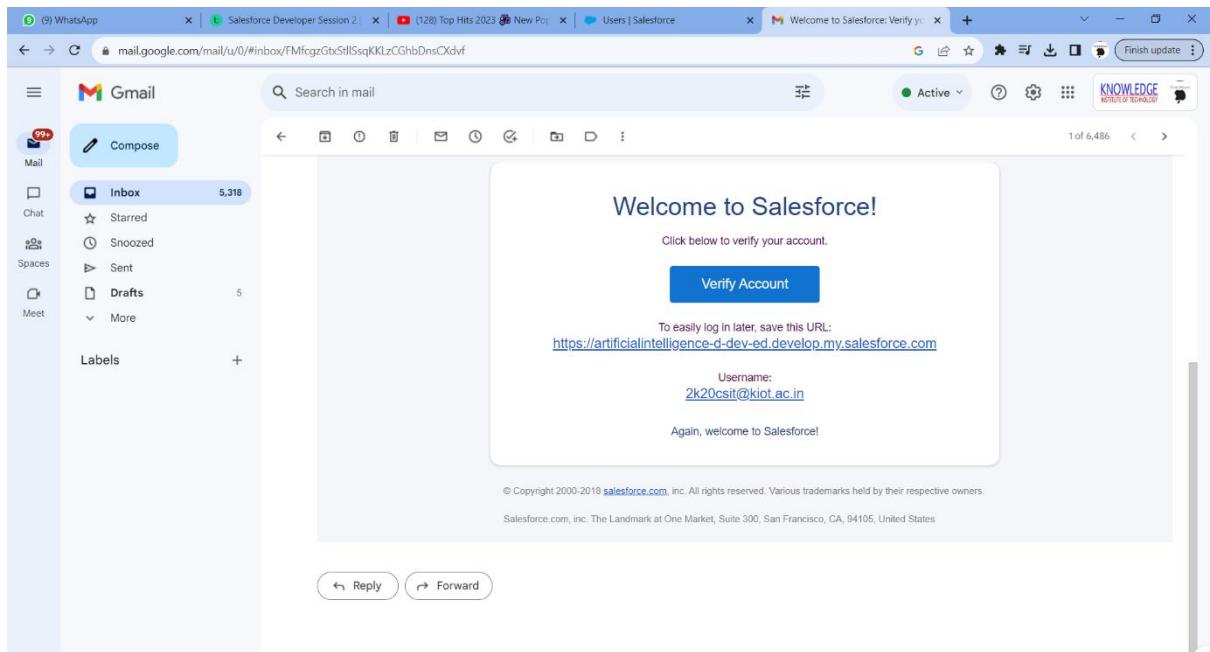
User Detail

Name	madhu b	Role	[empty]
Alias	mb	User License	Salesforce Platform
Email	2k20csel79@kiot.ac.in [Verify]	Profile	salesmanager
Username	2k20csel79@kiot.ac.in	Active	<input checked="" type="checkbox"/>
Nickname	User16961684242865419206	Marketing User	<input type="checkbox"/>
Title	worker	Offline User	<input type="checkbox"/>
Company	kiot bank	Knowledge User	<input type="checkbox"/>
Department	Sales	Flow User	<input type="checkbox"/>
Division	[empty]	Service Cloud User	<input type="checkbox"/>
Address	4/194, ariyampalayam, uthamasolapuram .., Paraiakkadu, salem- 636308, SALEM 636308, TAMIL NADU	Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	<input type="checkbox"/>
Delegated Approver	[empty]	Data.com User Type	<input type="checkbox"/>
Manager	[empty]	Accessibility Mode (Classic Only)	<input type="checkbox"/>
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/>
Federation ID	[empty]	High-Contrast Palette on Charts	<input type="checkbox"/>
App Registration: One-Time Password Authenticator	[empty]	Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>

User ProfileHelp for this Page

Sharing Reset Password Login Freeze

App Menu



Recently Viewed | Bank | Salesforce

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

Bank

Recently Viewed

0 items • Updated a few seconds ago

Bank Name

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

List View

Recently Viewed | customers | Salesforce

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

customers

Recently Viewed

0 items • Updated a few seconds ago

customer Name

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

Recently Viewed | customers | Salesforce

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

customers

Recently Viewed

0 items • Updated a few seconds ago

customer Name

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

(9) WhatsApp | Salesforce Developer Session | (128) Top Hits 2023 | New | Permission Sets | Salesforce | Welcome to Salesforce: Version 44.0 | Reset Password | Salesforce

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

Setup

Home Object Manager

Search Setup

Permission Sets

Permission Sets

This page allows you to create, view, and manage permission sets. In addition, you can use the Salesforce mobile app to assign permission sets to a user. Download Salesforce from the App Store or Google Play: iOS | Android.

All Permission Sets | Edit | Delete | Create New View

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

Actions & Recommendations

Page 1 of 29 | 0 Selected |

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

Step 2:

Permission Sets:

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

Object-Level Security:

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

Record-Level Security:

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

Ownership:

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

Organization-Wide Defaults:

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

Testing:

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

The screenshot shows the Salesforce Setup interface with the 'Permission Sets' page open. The left sidebar is collapsed, showing sections like 'User Management Settings', 'Feature Settings', 'Data.com', 'Prospector Users', 'Service', 'Embedded Service', and 'User Interface'. The main content area has a header 'Permission Sets' with a 'SETUP' icon. Below it is a sub-header 'Permission Sets' with a note: 'On this page you can create, view, and manage permission sets.' A search bar and a help link are also present. The main table lists 29 permission sets, each with an 'Action' column (containing 'New', 'Edit', 'Delete', and 'Clone' buttons), a 'Permission Set Label' column, a 'Description' column, and a 'License' column. The table includes a navigation bar at the bottom with links for 'All', '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', and 'Other'. The 'Other' link is currently selected. The bottom of the page shows pagination with '1-25 of 29' and '0 Selected'.

Salesforce Developer Session | (128) Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce: Version 44.0 | Reset Password | Salesforce | Finish update

Setup Home Object Manager

user

Users

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

Feature Settings

- Data.com
- Prospector Users

Service

- Embedded Service
- Messaging for In-App and Web User Verification

User Interface

- Action Link Templates
- Actions & Recommendations

App Menu

Search Setup

Help for this Page

Salesforce Developer Session | (128) Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce: Version 44.0 | Reset Password | Salesforce | Finish update

Setup Home Object Manager

user

Users

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

Feature Settings

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- Prospector Users

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- Action Link Templates
- Actions & Recommendations

App Menu

Search Setup

Help for this Page

Salesforce Developer Session | (128) Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce: Version 44.0 | Reset Password | Salesforce | Finish update

Setup Home Object Manager

user

Users

- Permission Set Groups
- Permission Sets**
- Profiles
- Public Groups
- Queues
- Roles
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- Users**

Feature Settings

- Data.com
- Prospector Users

Service

- Embedded Service
- Messaging for In-App and Web User Verification

User Interface

- Action Link Templates
- Actions & Recommendations

App Menu

Search Setup

Video Tutorial | Help for this Page

Permission Set Overview

Description	API Name	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

Learn More

Screenshot of the Salesforce Setup interface showing the "Permission Sets" page for the "salesmanager" permission set.

The left sidebar shows the navigation menu under "Users".

The main content area displays the "Object Settings" tab for the "salesmanager" permission set. It lists various objects and their permissions:

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

Screenshot of the Salesforce Setup interface showing the "Permission Sets" page for the "salesmanager" permission set.

The left sidebar shows the navigation menu under "Users".

The main content area displays the "Object Settings" tab for the "salesmanager" permission set. It shows the "Bank" object settings:

- Tab Settings**: Shows the "Available" tab is selected.
- Object Permissions**: Shows the following permissions for the "Bank" object:

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**: Shows the following field permissions for the "Bank" object:

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

Salesforce Developer Session | 128 Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce: Ve | Reset Password | Salesforce | Finish update

Permission Sets

Permission Set salesmanager

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 type="checkbox"/>	<input type="checkbox"/>
Created By	<input type="checkbox"/>	<input type="checkbox"/>
Last Modified By	<input type="checkbox"/>	<input type="checkbox"/>

Video Tutorial | Help for this Page

Salesforce Developer Session | 128 Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce: Ve | Reset Password | Salesforce | Finish update

salesmanager

... > SETUP > PERMISSION SET 'SALESMANAGER'

Current Assignments

No assignments defined.



Add Assignment

Setup Home Object Manager

Select Users to Assign

All Users

Full Name	Role	Profile
Amelia Ellington	Force.com - App Subscription User	
Chatter Expert	Chatter Free User	
Diya Adanna	UMS User	
GOPAL S	System Administrator	
Integration User	Analytics Cloud Integration User	
madhu b	salesmanage	
Security User	Analytics Cloud Security User	
sowmya bala	Manager	

Cancel Next

Setup Home Object Manager

Select an Expiration Option For Assigned Users

No expiration date

Specify the expiration date

Time Zone

Selected Users

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

Cancel Back Assign

The screenshot displays two overlapping Salesforce windows. The top window is titled 'Assignment Summary' and shows a table with one row of data:

Full Name	User License	Expires On	Time Zone	Status
madhu b	Salesforce Platform			<input checked="" type="checkbox"/> Success

A green banner at the top of this window indicates '1 assignments were successful.' The bottom window shows a 'Recently Viewed' list for the 'customers' object. The list is currently empty, displaying the message: 'You haven't viewed any customers recently. Try switching list views.' A context menu is open on the right side of the list, titled 'LIST VIEW CONTROLS', with options including 'New', 'Clone', 'Rename', 'Sharing Settings', 'Show List Filters', 'Select Fields to Display', and 'Delete'. The URL in the browser bar is https://artificialintelligence-d-dev-ed.lightning.force.com/lightning/o/customer__c/list?filterName=Recent.

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

Solution:

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

The screenshot shows the Salesforce Setup interface under the Profiles section. The left sidebar includes options like Public Groups, Queues, Roles, User Management Settings, and a Prospector tab. The main area displays a table of profiles with columns for Action, Profile Name, User License, and Status (Custom). The table lists various standard and custom profiles such as Analytics Cloud Integration User, Authenticated Website, Chatter External User, etc. A navigation bar at the bottom indicates 'Page 1 of 2'.

Step 2:

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

The screenshot shows the 'Clone Profile' dialog box. It prompts the user to enter the name of the new profile and states 'You must select an existing profile to clone from.' The 'Existing Profile' dropdown is set to 'Standard Platform User'. The 'User License' is listed as 'Salesforce Platform' and the 'Profile Name' is entered as 'Jaga'. At the bottom are 'Save' and 'Cancel' buttons.

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

Step 3:

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

The screenshot shows the Salesforce Setup interface under the Profiles section. On the left, the navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main content area displays 'Profile Jaga' with a list of permissions and page layout assignments. The 'Page Layouts' section shows various standard object layouts assigned to different profiles like Global, Order, and Payment.

The screenshot shows the Salesforce Setup interface under the Profiles section. The main content area displays 'Custom Object Permissions' and 'Session Settings'. Under 'Custom Object Permissions', there are two tables for 'Basic Access' and 'Data Administration' for 'Providers' and 'Resources'. Under 'Session Settings', it shows session times out after 2 hours of inactivity and session security levels required at login.

Profiles | Salesforce

Search Setup

Setup Home Object Manager

Users

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

 - Feature Settings
 - Data.com
 - Prospector Users

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

25°C Partly sunny

Communication Subscription Owner Types

	Communication Subscription Consents	Communication Subscription Timings	Contacts	Contact Point Addresses	Contact Point Consents	Contact Point Emails	Locations	Party Consents	Push Topics	Sellers	Streaming Channels	User External Credentials
Read	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>					
Create	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>					
Edit	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>					
Delete	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					
View All	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					
Modify All	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					

Custom Object Permissions

	Basic Access	Read	Create	Edit	Delete	Data Administration
Providers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Resources	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Session Settings

	Session Times Out After	Session Security Level Required at Login
Session Times Out After	2 hours of inactivity	-None-
Enable different Experience Cloud login policies for employees.	<input type="checkbox"/>	
Separate Experience Cloud site and Salesforce login authentication for employees.	<input type="checkbox"/>	
Relax login IP restrictions	<input type="checkbox"/>	
Skip employee device activation during Experience Cloud site login	<input type="checkbox"/>	

ENG IN 08:21 AM 01-10-2023

Profiles | Salesforce

Search Setup

Setup Home Object Manager

Users

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

 - Feature Settings
 - Data.com
 - Prospector Users

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

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Profile Edit Jaga

Help for this Page

Profile Edit

Name	Jaga	User License	Salesforce Platform	Description	Custom Profile
Name	<input type="text" value="Jaga"/>	User License	Salesforce Platform	Description	<input checked="" type="checkbox"/>

Custom App Settings

Visible	Default	Visible	Default
<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input checked="" type="radio"/>
<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>
<input checked="" type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>

Service Provider Access

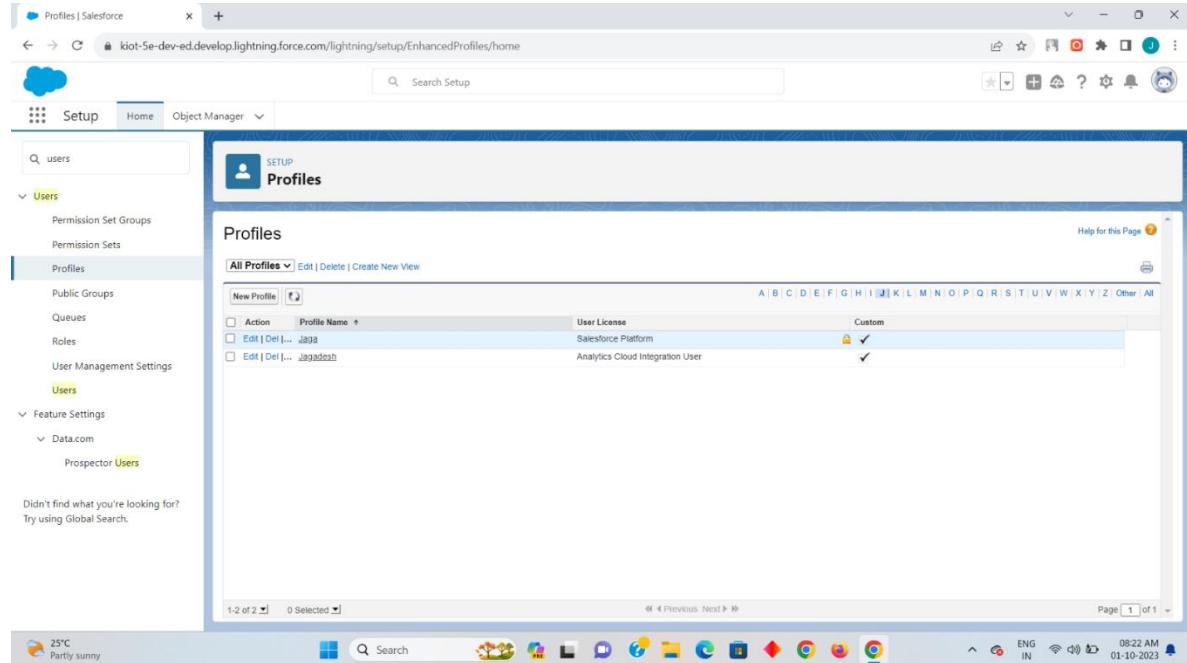
Tab Settings

Overwrite users' personal tab customizations

ENG IN 08:21 AM 01-10-2023

Step 4

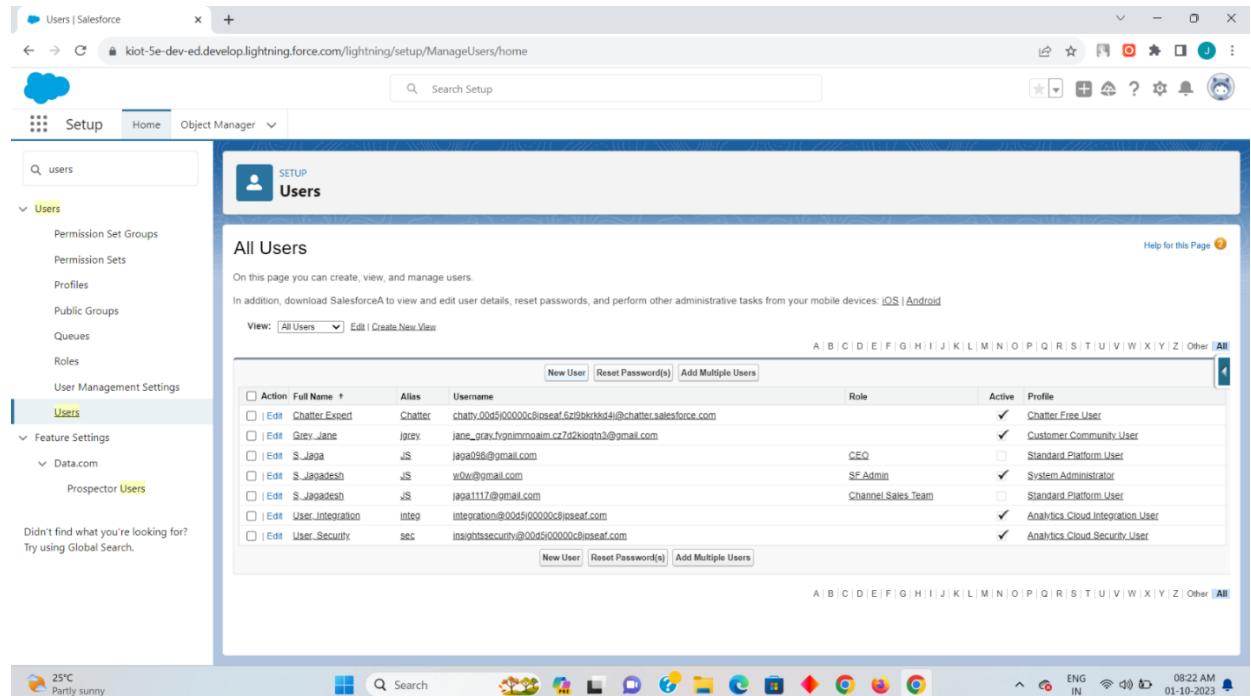
Now you can preview your created profile on the profile option here my profile name jaga has been created with the access of read,create,edit along with view on it



The screenshot shows the Salesforce Setup interface under the Profiles section. The left sidebar is expanded to show 'Users' and its sub-options: Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and Users. Under 'Users', there is a note: 'Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'Profiles' and shows a table with two rows: 'Edit [Def... Jaga' and 'Edit [Def... Jagadesh'. The 'User License' column indicates 'Salesforce Platform' for Jaga and 'Analytics Cloud Integration User' for Jagadesh. The 'Custom' column shows checked checkboxes for both. A navigation bar at the bottom includes links for '1 of 2', '0 Selected', 'Page 1 of 1', and icons for search, refresh, and navigation.

Step 5:

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



The screenshot shows the Salesforce Setup interface under the Users section. The left sidebar is expanded to show 'Users' and its sub-options: Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and Users. Under 'Users', there is a note: 'Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'All Users' and shows a table with eight rows of user data. The columns include Action, Full Name, Alias, Username, Role, Active, and Profile. The 'Profile' column for all users shows 'Chatter Free User' or 'Customer Community User'. The 'Role' column includes 'CEO', 'SF Admin', 'Channel Sales Team', 'Analytics Cloud Integration User', and 'Analytics Cloud Security User'. The 'Active' column has mixed status (some checked, some unchecked). A navigation bar at the bottom includes links for 'New User', 'Reset Password(s)', 'Add Multiple Users', and icons for search, refresh, and navigation.

New User

User Edit

General Information

First Name	Jagadesh11
Last Name	S
Alias	JB
Email	jwv123@gmail.com
Username	jwv123@gmail.com
Nickname	User169612875144962592
Title	
Company	
Department	
Division	

Role: Director, Channel Sales
User License: Salesforce Platform
Profile: Standard Platform User
Active:

Marketing User: Standard Platform User

Data.com User Type:

Accessibility Mode (Classic Only):

High-Contrast Palette on Charts:

New User

User Edit

General Information

First Name	Jagadesh22
Last Name	S
Alias	JB
Email	jw1@gmail.com
Username	jw1@gmail.com
Nickname	User169612879963618745
Title	
Company	
Department	
Division	

Role: Marketing Team
User License: Salesforce Platform
Profile: Standard Platform User
Active:

Marketing User: Standard Platform User

Data.com User Type:

Accessibility Mode (Classic Only):

High-Contrast Palette on Charts:

All Users

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

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

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Jagadesh11	JB	jwv123@gmail.com	CEO	<input type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	Jagadesh22	JB	jw1@gmail.com	SP Admin	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Jagadesh22	JB	jw1117@gmail.com	Channel Sales Team	<input type="checkbox"/>	Standard Platform User
<input checked="" type="checkbox"/>	Jagadesh11	JB	jwv123@gmail.com	Director, Channel Sales	<input checked="" type="checkbox"/>	Jaga
<input checked="" type="checkbox"/>	Jagadesh22	JB	test1@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Guru

New User | **Reset Password(s)** | **Add Multiple Users**

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 'Permission Sets' page in the Salesforce setup. The left sidebar is expanded to show 'Users' and 'Permission Set Groups'. Under 'Permission Set Groups', 'Permission Sets' is selected. The main area displays a table of permission sets with columns for Action, Permission Set Label, Description, and License. The table includes rows for various roles like 'Buyer', 'CRM User', 'Commerce Admin', etc., along with their respective descriptions and licenses. A search bar at the top is empty, and a navigation bar at the bottom shows the URL as https://kot-5e-dev-ed.lightning.force.com/lightning/setup/PermSets/home.

The screenshot shows the 'Create' page for a new permission set. The left sidebar is identical to the previous screenshot. The main area has a form titled 'Enter permission set information'. It includes fields for 'Label' (set to 'permission12'), 'API Name' (set to 'permission12'), and 'Description'. Below the form is a section titled 'Select the type of users who will use this permission set'. It contains a note about choosing a license and a dropdown menu for 'License' which is currently set to '-None-'.

Permission Sets | Salesforce

Setup Home Object Manager

Search Setup

Users

Permission Set Groups

- Permission Sets
- Profiles
- Public Groups
- Queues
- Roles
- User Management Settings
- Users**
- Feature Settings
- Data.com
- Prospector Users

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

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SETUP Permission Sets

Permission Set permission12

Find Settings... Close Delete Edit Properties Manage Assignments

Permission Set Overview

Description	API Name	permission12
License	Namespace Prefix	
Session Activation Required	Created By	Jagadeesh S. 01/10/2023, 8:24 am
Last Modified By		

Apps

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

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

Object Settings
Permissions to access objects and fields, and settings such as tab availability

App Permissions
Permissions to perform app-specific actions, such as "Manage Call Centers"

Apex Class Access
Permissions to execute Apex classes

Visualforce Page Access
Permissions to execute Visualforce pages

External Data Source Access

Video Tutorial | Help for this Page

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ENG IN 08:24 AM 01-10-2023

Permission Sets | Salesforce

Setup Home Object Manager

Search Setup

Users

Permission Set Groups

- Permission Sets
- Profiles
- Public Groups
- Queues
- Roles
- User Management Settings
- Users**
- Feature Settings
- Data.com
- Prospector Users

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SETUP Permission Sets

Permission Set permission12

Find Settings... Close Delete Edit Properties Manage Assignments

Permission Set Overview > Object Settings

Object Settings

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

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Permission Sets | Salesforce

Setup Home Object Manager

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SETUP Permission Sets

Permission Set permission12

Find Settings... Close Delete Edit Properties Manage Assignments

Permission Set Overview > Object Settings > Accounts

Accounts

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
Account Name	<input type="checkbox"/>	<input type="checkbox"/>
Account Number	<input type="checkbox"/>	<input type="checkbox"/>
Account Owner	<input type="checkbox"/>	<input type="checkbox"/>
Account Site	<input type="checkbox"/>	<input type="checkbox"/>
Account Source	<input type="checkbox"/>	<input type="checkbox"/>

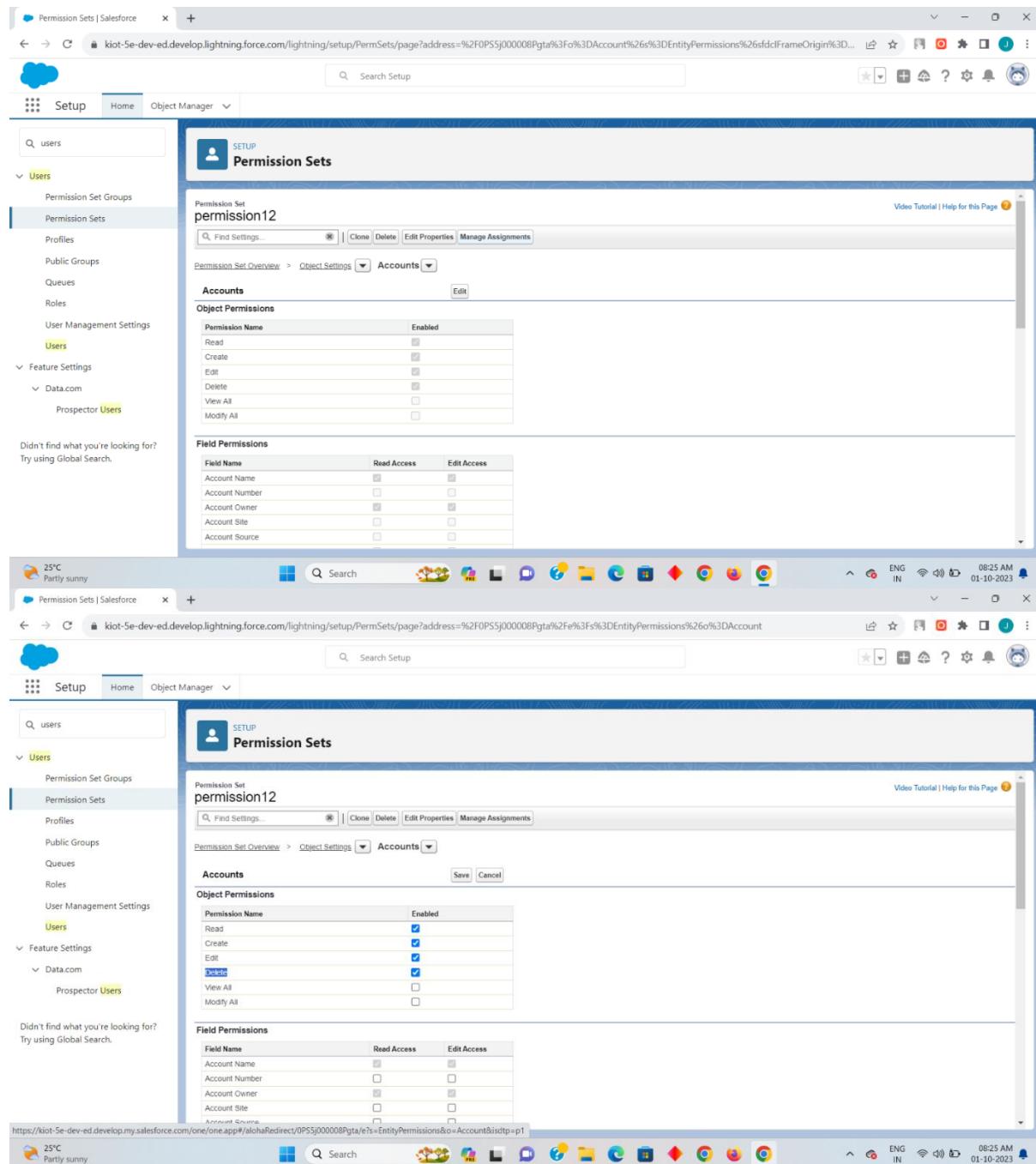
Video Tutorial | Help for this Page

25°C Partly sunny

ENG IN 08:25 AM 01-10-2023

Step 7:

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



The screenshot shows the Salesforce Setup interface for managing Permission Sets. The left sidebar is collapsed, and the main area displays the 'Permission Sets' page for a permission set named 'permission12'. The 'Object Settings' dropdown is set to 'Accounts'. In the 'Object Permissions' section, the 'Delete' checkbox is checked under the 'Enabled' column. In the 'Field Permissions' section, the 'Delete' checkbox is checked under the 'Edit Access' column for the 'Account' field. The status bar at the bottom indicates it's 08:25 AM on 01-10-2023.

Step 8

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

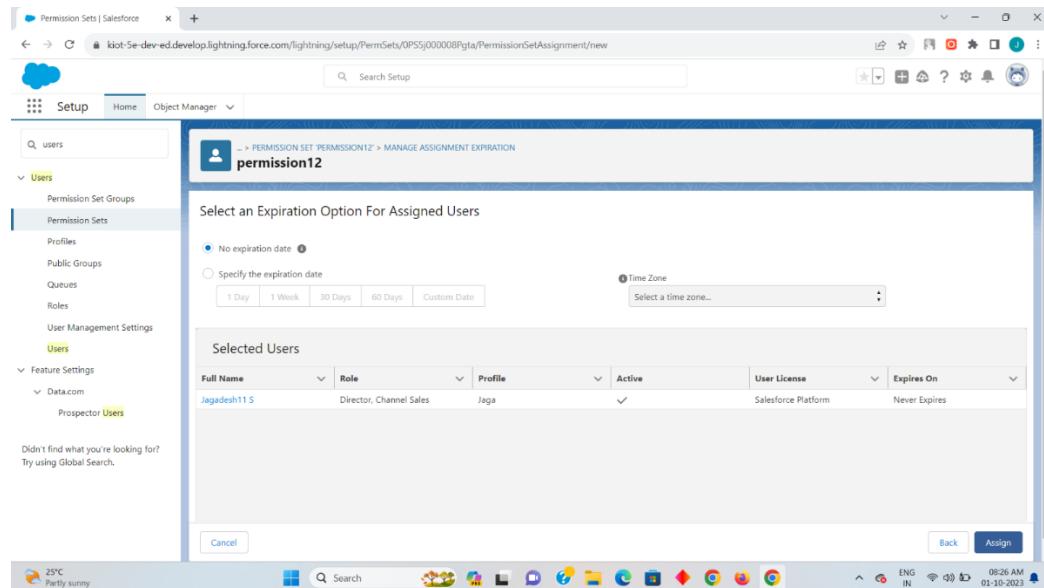
The image consists of three vertically stacked screenshots of the Salesforce setup interface, showing the process of assigning users to a permission set.

Screenshot 1: Current Assignments
The first screenshot shows the "Current Assignments" page for a permission set named "permission12". The interface includes a search bar, a sidebar with navigation links like Setup, Home, Object Manager, and a main area titled "Current Assignments" with a decorative background illustration of a cactus and clouds. A message at the bottom states "No assignments defined."

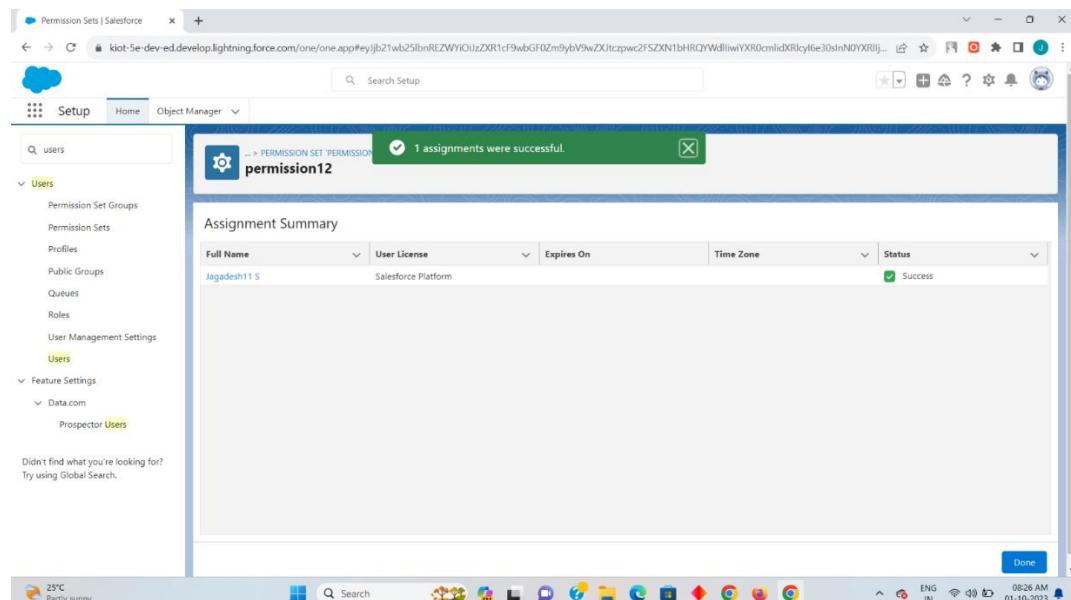
Screenshot 2: Select Users to Assign
The second screenshot shows the "Select Users to Assign" step of the assignment process. It displays a list of "All Users" with columns for Full Name, Alias, Username, Role, Active, and Profile. A search bar at the top right contains the text "jagadesh". A tooltip message above the search bar reads: "Roles, Alias, and Profile aren't searchable. Use filters or sort on these fields instead." The list includes four users: Jagadesh S, Jagadesh S, Jagadesh11 S, and Jagadesh22 S.

Screenshot 3: Select Users to Assign (with selection)
The third screenshot shows the same "Select Users to Assign" step, but with the user "Jagadesh11 S" selected, indicated by a checked checkbox in the "Active" column. The rest of the interface remains the same, including the search bar with "jagadesh" and the list of users.

Click on next.



Now click on Assign.



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

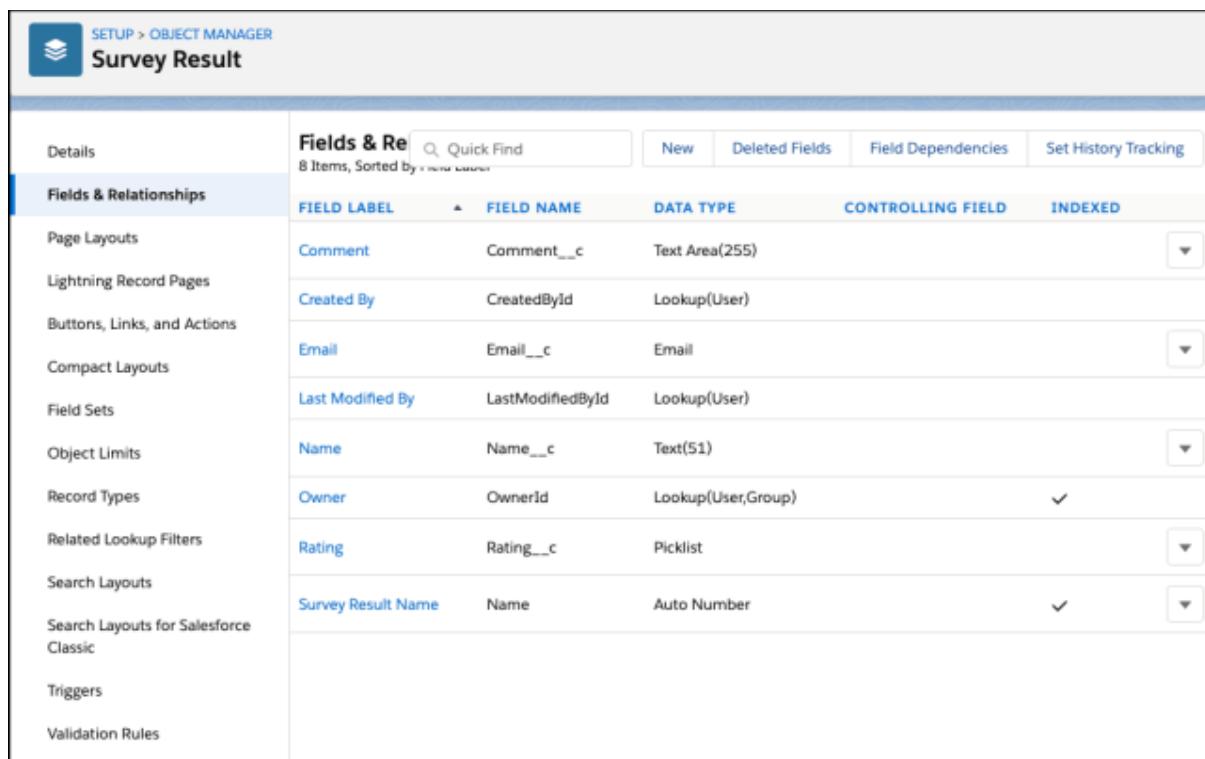
4.Create a screen flow for a basic survey to fill in the details for any form.

Solution:

Step 1: Create a Custom Object

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

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

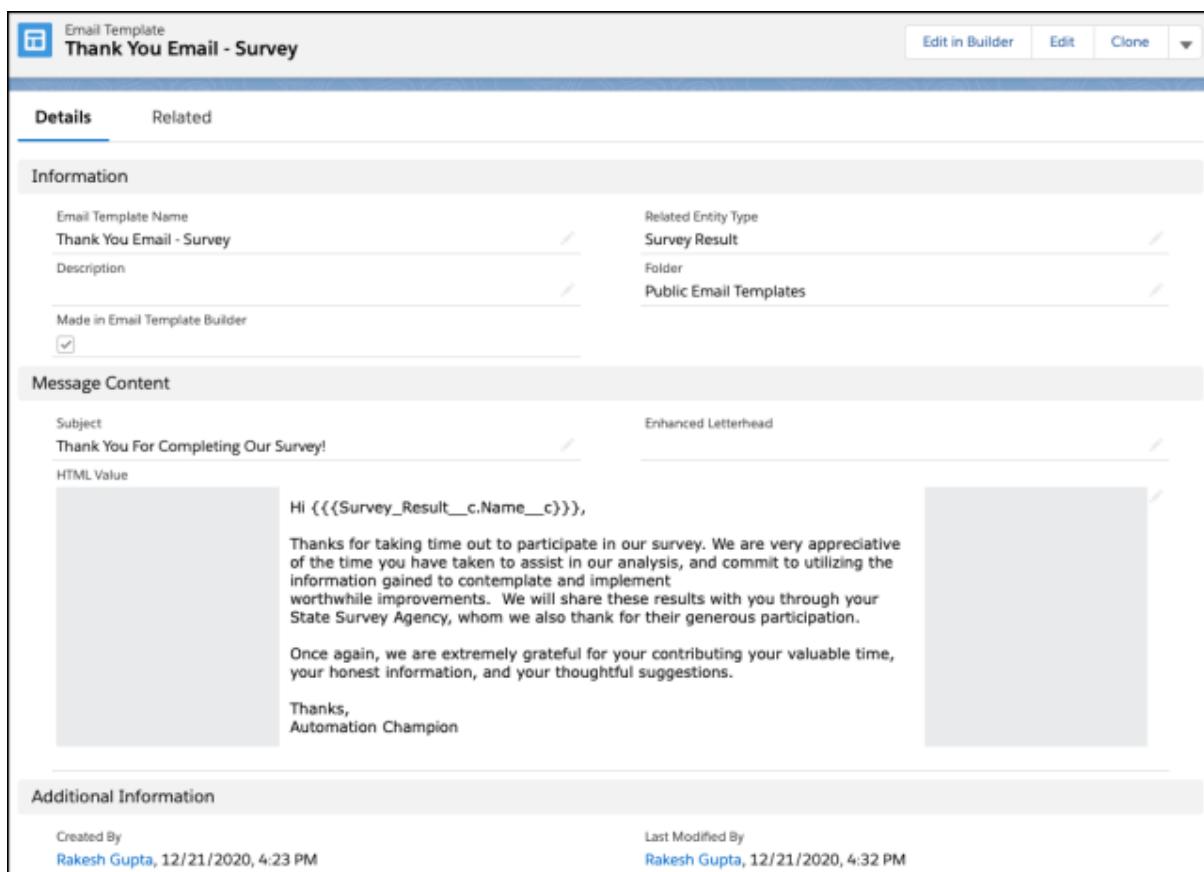


The screenshot shows the Salesforce Object Manager interface for creating a custom object named "Survey Result". The left sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The main area is titled "Fields & Relationships" and displays a table of fields. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are:

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

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

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



Step 3: Create an Email Alert

1. Click **Setup**.
2. In the Quick Find box, type **Email Alerts**.
3. Select **Email Alerts**, click on the **New Email Alert** button.
4. **Name the Email Alert** and click the Tab button. The **Unique Name** will populate.
5. For **Object** select **Survey Result**.
6. For the **Email Template** chooses **Lightning Email Template Thank You Email – Survey**.
7. For **Recipient Type** select **Email Field: Email**.
8. Click **Save**.

Edit Email Alert
Survey - Thank You Email

Create an email alert to associate with one or more workflow rules, approval processes, or entitlement processes. When changing an email alert, any modifications will apply to all rules, approvals, or entitlement processes associated with it.

Email Alert Edit

Save | Save & New | Cancel

Edit Email Alert

Description: Survey - Thank You Email

Unique Name: Survey_Thank_You_Email

Object: Survey Result

Email Template: Thank You Email - Survey

Protected Component:

Recipient Type: Search: User for: Find

Recipients	Available Recipients	Selected Recipients
	User: Integration User User: Rakesh Gupta User: Security User	Email Field: Email
	Add Remove	

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

Additional Emails:

From Email Address: Current User's email address

Make this address the default From email address for this object's email alerts.

Save | Save & New | Cancel

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

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

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

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

2. Click **Add Row**
 3. Row 2:
 1. **Field: Email__c**
 2. **Value: {!Email.value}**
 4. Click **Add Row**
 5. Row 3:
 1. **Field: Name__c**
 2. **Value: {!Name.firstName} {!Name.lastName}**
 6. Click **Add Row**
 7. Row 3:
 1. **Field: Rating__c**
 2. **Value: {!Rating}**
7. Click **Done**.

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.

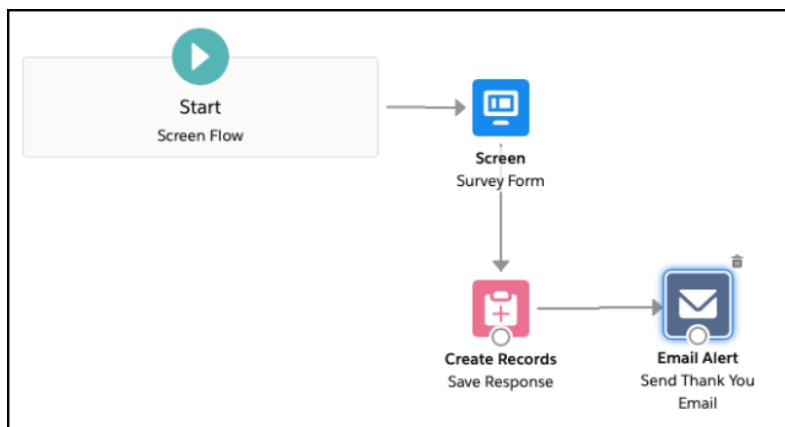
* Label	* API Name
Send Thank You Email	Send_Thank_You_Email
Description	
<pre>{!Save_Response}</pre>	

Set Input Values

A_a * Record ID	{!Save_Response}
-----------------	------------------

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

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



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

Save as

[A New Version](#) [A New Flow](#)

* Flow Label

Survey

* Flow API Name

Survey

Description

[Hide Advanced](#)

How to Run the Flow [?](#)

User or System Context—Depends on How Flow is Launched

* Type

Screen Flow

* API Version for Running the Flow

51

Interview Label [?](#)

Insert a resource...



Survey {!\$Flow.CurrentDateTime}

Last Modified

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

Status:

Active

Type:

Screen Flow

Version Number:

2

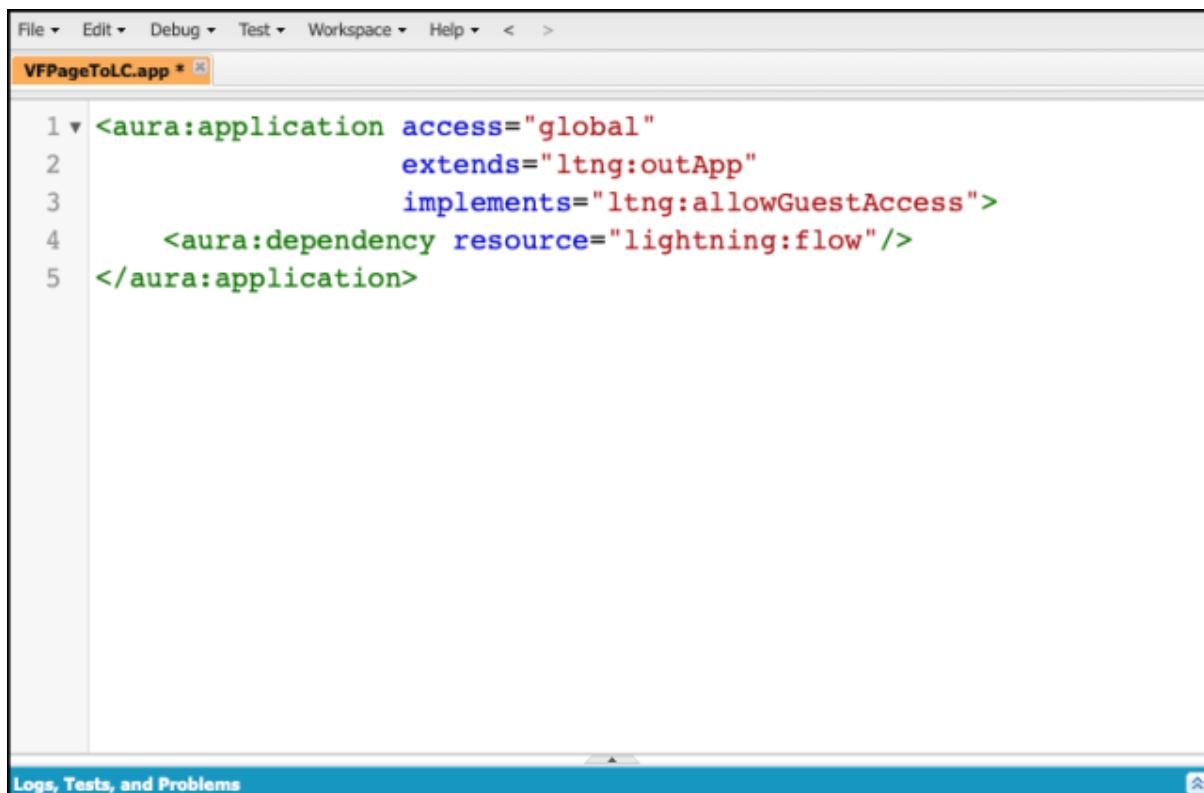
[Cancel](#)

[Save](#)

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

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

1. Click **Setup | Developer Console**
2. Navigate to **File | New | Lightning Application**
3. Enter a **Name (VFPPageToLC)** 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 Developer Console interface. The top navigation bar includes File, Edit, Debug, Test, Workspace, Help, and tabs for < >. A tab labeled "VFPPageToLC.app *" is active. The main 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>
```

At the bottom of the screen, there is a blue footer bar with the text "Logs, Tests, and Problems" and a small icon.

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()`. Click **Setup**.

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

The screenshot shows the Visualforce Page Editor for a page named 'Survey'. The 'Page Information' section includes fields for Label ('Survey'), Name ('Survey'), and Description. It also has checkboxes for 'Available for Lightning Experience, Experience Builder sites, and the mobile app' (checked) and 'Require CSRF protection on GET request' (unchecked). The 'Visualforce Markup' tab displays the following Apex code:

```

1 <apex:page showheader="false" lightningStylesheets="true">
2 <html>
3   <head>
4     <apex:includeLightning />
5     <!--Use apex:includeLightning to add the Lightning Components for Visualforce JavaScript library to your Visualf
6   </head>
7   <body class="slds-scope">
8     <div id="flowContainer" />
9     <script>
10       var statusChange = function (event) {
11         if(event.getParam("status") === "FINISHED") {
12           var outputVariables = event.getParam("outputVariables");
13           var key;
14           for(key in outputVariables) {
15             if(outputVariables[key].name === "myOutput") {
16               ...
17             }
18           }
19         }
20       };
21       $Lightning.use("c:VFPageToLC", function() {
22         $Lightning.createComponent("lightning:flow", {"onstatuschange":statusChange},
23         "flowContainer",
24         function (component) {
25           component.startFlow("Survey");
26         }
27       });
28     </script>
29   </body>

```

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

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

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

The screenshot shows the 'Site Edit' screen for a site labeled 'Survey'. The site has the same name 'Survey' for both 'Site Label' and 'Site Name'. The 'Site Description' field is empty. The 'Site Contact' is listed as 'Rakesh Gupta'. The 'Default Record Owner' is also 'Rakesh Gupta'. The 'Default Web Address' is set to <http://katihar-developer-edition.gus.force.com/>. The site is marked as 'Active' with a checked checkbox. The 'Active Site Home Page' is set to 'Survey' and has a preview link. The 'Inactive Site Home Page' is set to 'InMaintenance' and also has a preview link. The 'Site Template' is 'SiteTemplate'. The 'Site Robots.txt' and 'Site Favorite Icon' fields are empty. The 'Analytics Tracking Code' and 'URL Rewriter Class' fields are also empty. Under the 'Enable Feeds' section, there is an unchecked checkbox. The 'Clickjack Protection Level' is set to 'Allow framing by the same origin only (Recommended)'. The 'Require Secure Connections (HTTPS)' and 'Lightning Features for Guest Users' checkboxes are checked. The 'Upgrade all requests to HTTPS' checkbox is checked. The 'Enable Content Sniffing Protection' and 'Enable Browser Cross Site Scripting Protection' checkboxes are checked. The 'Referrer URL Protection' and 'Guest Access to the Payments API' checkboxes are unchecked.

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

Proof of Concept

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

Survey

Name

First Name
Alok

Last Name
Sinfal

* Email
[Redacted]

* Rating
5

* Comment
Awesome Blog 

Next

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

