

## 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 interface. The page is titled 'New Custom Object' and contains several sections for defining the custom object:

- Custom Object Definition Edit**: Includes tabs for 'Save', 'Save & New', and 'Cancel'. A note at the top says: "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 Information**:
  - Label**: college (Example: Account)
  - Plural Label**: Colleges (Example: Accounts)
  - Starts with vowel sound**:
- Description**: A large text area for entering a description of the object.
- Context-Sensitive Help Setting**: Options to open the standard Salesforce.com Help & Training window or a Visualforce page. The 'Open the standard Salesforce.com Help & Training window' option is selected.
- Content Name**: A dropdown menu set to 'None'.
- Enter Record Name Label and Format**:
  - The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.
  - Record Name**: college Name (Example: Account Name)
  - Data Type**: Text
- Optional Features**:
  - Allow Reports
  - Allow Activities
  - Track Field History
  - Allow in Chatter Groups
  - Enable Licensing
- Object Classification**:
  - When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more](#).
  - Allow Sharing
  - Allow Bulk API Access
  - Allow Streaming API Access
- Deployment Status**:
  - In Development
  - Deployed
- Search Status**:
  - When this setting is enabled, your users can find records of this object type when they search. [Learn more](#).
  - Allow Search
- Object Creation Options (Available only when custom object is first created)**:
  - Add Notes and Attachments related list to default page layout
  - Launch New Custom Tab Wizard after saving this custom object

At the bottom of the page are three buttons: 'Save', 'Save & New', and 'Cancel'.

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



Setup Home Object Manager

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**

**Custom Object Information**

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

Label:  Example: Account  
Plural Label:  Example: Accounts  
Starts with vowel sound:

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

Object Name:  Example: Account

Description:

Context-Sensitive Help Setting:  Open the standard Salesforce.com Help & Training window  Open a window using a Visualforce page

Content Name:

**Enter Record Name Label and Format**

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

Record Name:  Example: Account Name

Data Type:

**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 options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, Scoping Rules, Triggers, Flow Triggers, and Validation Rules. The main 'Details' section displays the API Name as 'CDepartment\_\_c', Singular Label as 'CDepartment', and Plural Label as 'CDepartments'. On the right, there are sections for Description, Enable Reports, Track Activities, Track Field History, Deployment Status (Deployed), Help Settings, and Standard salesforce.com Help Window.

**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 'Field Label' is set to 'college', and the 'Field Name' is also 'college'. There is a 'Description' field and a 'Help Text' field. Below these, the 'Child Relationship Name' is set to 'CDepartments'. Under 'Sharing Setting', the 'Read Only' radio button is selected, which is described as allowing users with at least Read access to the Master record to create, edit, or delete related Detail records. There are also options for 'Allow reparenting' (checkboxes for 'Child records can be reparented to other parent records after they are created' and 'Add this field to existing custom report types that contain this entity') and 'Auto add to custom report type'.

The top screenshot shows the 'New Relationship' wizard, Step 2: Choose the related object. It displays a dropdown menu with 'college' selected under 'Related To'. The bottom screenshot shows the 'New Custom Field' wizard, Step 1: Choose the field type. It lists several data types: None Selected, Auto Number, Formula, Roll Up Summary, Lookup Relationship, Master-Detail Relationship (selected), and External Lookup Relationship.

### 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.

**Salesforce Setup - Object Manager**

**CDepartment**

**Fields & Relationships**

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

**Tabs**

**Custom Tabs**

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

Custom Object Tabs

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

Web Tabs

No Web Tabs have been defined.

Visualforce Tabs

No Visualforce Tabs have been defined.

Lightning Component Tabs

No Lightning component tabs have been defined.

Lightning Page Tabs

No Lightning Page Tabs have been defined.

**college**

**New Custom Field**

**Step 5. Add to page layouts**

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

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

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

Add Field  Page Layout Name  
 college Layout

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

**Setup > OBJECT MANAGER college**

### 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"/>	✓
Analytics Cloud Security User	<input checked="" type="checkbox"/>	✓
Cloud Kicks Admin	<input checked="" type="checkbox"/>	✓
Contract Manager	<input checked="" type="checkbox"/>	✓
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	✓
Custom: Marketing Profile	<input checked="" type="checkbox"/>	✓
Custom: Sales Profile	<input checked="" type="checkbox"/>	✓
Custom: Support Profile	<input checked="" type="checkbox"/>	✓
customer	<input checked="" type="checkbox"/>	✓
Force.com - App Subscription User	<input checked="" type="checkbox"/>	✓

**Setup > OBJECT MANAGER college**

### New Custom Field

Step 3. Define the summary calculation Step 3 of 5

Select Object to Summarize

Master Object	college
Summarized Object	<b>CDepartments</b>

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**

### New Custom Field

Step 2. Enter the details Step 2 of 5

Field Label	<b>Total count</b>
Field Name	<b>Total_count</b>
Description	<input type="text"/>
Help Text	<input type="text"/>

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

Setup > OBJECT MANAGER college

### New Custom Field

Step 1. Choose the field type

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

**Data Type**

<input type="radio"/> None Selected	Select one of the data types below.
<input type="radio"/> Auto Number	A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
<input type="radio"/> Formula	A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
<input checked="" type="radio"/> Roll-Up Summary	A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
<input type="radio"/> Lookup Relationship	Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
<input type="radio"/> Master-Detail Relationship	Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where: <ul style="list-style-type: none"> <li>The relationship field is required on all detail records.</li> <li>The ownership and sharing of a detail record are determined by the master record.</li> <li>When a user deletes the master record, all detail records are deleted.</li> <li>You can create rollup summary fields on the master record to summarize the detail records.</li> </ul> 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.
<input type="radio"/> External Lookup Relationship	Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.
<input type="radio"/> ...	Allows users to select a True (checked) or False (unchecked) value.

Help for this Page

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	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User/Group)		✓

Quick Find New Deleted Fields Field Dependencies Set History Tracking

## 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 which the new custom tab will be available, with an option to apply one tab visibility to all profiles ('Default On') or apply a different tab visibility for each profile. A list of profiles is provided on the left, and a grid of tabs and visibility settings is on the right. At the bottom, there are 'Previous', 'Next', and 'Cancel' buttons.

Setup Home Object Manager

tabs

User Interface

Rename Tabs and Labels

**Tabs**

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

## New Custom Object Tab

Step 1. Enter the Details Step 1 of 3

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

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

Object: college

Tab Style: Jewel

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

Splash Page Custom Link: -None-

Enter a short description.

Description:

Next Cancel

Setup Home Object Manager

tabs

User Interface

Rename Tabs and Labels

**Tabs**

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

## Step 3. Add to Custom Apps

Step 3 of 3

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

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

Append tab to users' existing personal customizations

Previous Save Cancel

**New Custom Object Tab**

**Step 1. Enter the Details** Step 1 of 3

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

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

Object: **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-**

Enter a short description.

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	✓ ▼

**New Lightning App** **New Connected App**

## Conclusion:

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

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

## organization's requirements.

Recently Viewed

0 Items • Updated a few seconds ago

college Name

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

New Import Change Owner

History

New college

Information

\* college Name: kiot

Owner: krishna s

phone: 9087116402

Email: kiot@ac.in

Location

Latitude: 90

Longitude: 80

Required Information

Cancel Save & New Save

My college colleges CDdepartments student Content

CDepartments Recently Viewed

1 item • Updated a few seconds ago

Department Name
cse

New Import

History

app-d-dev-ed.develop.lightning.force.com/lightning/o/CDepartment\_c/new?count=3&nooverride=1&useRecordTypeCheck=1&navigationLocation=LIST\_VIEW&uid=169...

My college colleges CDdepartments

New CDepartment

Information

\* = Required Information

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

about

Cancel Save & New Save

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](mailto:it@gmail.com)

phone  
[897577568](tel: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](tel:9087116402)

Email  
[kiot@gmail.com](mailto: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

1  cse

New Import

History

My college colleges CDepartments student Content

Recently Viewed ▾

1 item • Updated a few seconds ago

	college Name
1	kiot

New Import Change Owner

History

My college colleges CDepartments student Content

college kiot

Related Details

college Name kiot	Owner krishna s
Total count 2	
phone 9087116402	
Email kilot@gmail.com	
Location 90, 80	

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

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

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

**Solution:**

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

The screenshot shows two separate instances of the Salesforce Setup Profiles page, each displaying a list of profiles. In the top instance, the 'Chatter External User' profile is selected, while in the bottom instance, the 'Salesforce API Only System Integrations' profile is selected. Both pages show columns for Action, Profile Name, User License, and Custom status.

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

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

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 fields for 'Existing Profile' (set to 'Standard Platform User'), 'User License' (set to 'Salesforce Platform'), and 'Profile Name' (containing the placeholder text 'Manage')). At the bottom right are 'Save' and 'Cancel' buttons.

This screenshot is identical to the one above, but the 'Profile Name' field now contains the text 'Manage!'. All other elements, including the sidebar navigation and the overall layout of the 'Clone Profile' page, remain the same.

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

## Setup

### Profiles

#### 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 Definitions Access | Enabled Flow Access | Enabled Service Presence Status Access | Enabled Custom Permissions

Name	Manager	Custom Profile
User License	Salesforce Platform	<input checked="" type="checkbox"/>
Description		
Created By	GOPAL_S 01/10/2023, 7:09 pm	Modified By
	GOPAL_S 01/10/2023, 7:09 pm	

#### Profile Detail

Edit | Close | Delete | View Users

#### Page Layouts

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

[View Assignment] [View Assignment] [View Assignment] [View Assignment] [View Assignment] [View Assignment]

Operating Hours Layout [View Assignment] Order Layout [View Assignment] Order Product Layout [View Assignment] Payment Layout [View Assignment] Payment Authorization Layout [View Assignment] Payment Authorization Adjustment Layout [View Assignment] Payment Gateway Layout [View Assignment]

#### Record Type Settings

Enabled Record Types

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

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## Setup

### Profiles

#### Manager

Set the permissions and page layouts for this profile.

Profile Edit

Name: Manager  
User License: Salesforce Platform  
Description:   
Custom Profile:

#### Custom App Settings

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

Platform (standard\_\_Platform)  WDC (standard\_\_Work)

#### Service Provider Access

##### Tab Settings

Overwrite users' personal tab customizations

Standard Tab Settings	Home	Default On
Accounts	<input checked="" type="radio"/>	Default On
Alert Settings	<input type="radio"/>	Default On

Learning  Default On  
Libraries  Tab Hidden  
Lightning Bolt Solutions  Default On

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

## Profiles

Communication Subscription Channel Types

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

Individuals

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

Locations

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

Party Consents

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

Push Topics

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

Sellers

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

Streaming Channels

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

User External Credentials

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

Custom Object Permissions

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

Profiles

Custom Object Permissions

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

	Basic Access	Read	Create	Edit	Delete	Data Administration	View All	Modify All
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

Obscure secret answer for password resets:

Require a minimum 1 day password lifetime:

Don't immediately expire links in forgot password emails:

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

Profiles

Custom Object Permissions

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

	Basic Access	Read	Create	Edit	Delete	Data Administration	View All	Modify All
Enhancement Requests	<input checked="" 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

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Minimum password length: 8

Password complexity requirement: Must include alpha and numeric characters

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Lockout effective period: 15 minutes

Obscure secret answer for password resets:

Require a minimum 1 day password lifetime:

Don't immediately expire links in forgot password emails:

Salesforce Developer Session | 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
<a href="#">Edit</a>   <a href="#">Login</a>	Adriana_Civila	dadan	test_diana_pas_4w@blvbf9wk.tszqrrgzbkxox_3o18of0yvzrns_hi43hkzw6mea@gmail.com		<input checked="" type="checkbox"/>	JMS User
<a href="#">Edit</a>	Chatter Expert	Chatter	chatty_000500000bcakab1o0nfarmj0ke@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<a href="#">Edit</a>   <a href="#">Login</a>	Ellington_Amelia	aelli	amelia.ellington.146kxp9oodih.dlcwpodcu4wh.hnbdlwmwythwo.wguctor1daly@gmail.com		<input checked="" type="checkbox"/>	Standard Platform User
<a href="#">Edit</a>	S_GOPAL	GS	kot520@gmail.com		<input checked="" type="checkbox"/>	System Administrator
<a href="#">Edit</a>	User Integration	Integ	integration@000500000bcakab.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<a href="#">Edit</a>	User_Security	sec	insightsecurity@000500000bcakab.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

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

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

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

## Users

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	<input type="text"/> -None-
		Data.com Monthly Addition Limit	<input type="text"/> 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 | Downloads | Finish update

## Users

### New User

User Edit

General Information

First Name	sowmya
Last Name	bala
Alias	sbal8
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 | Downloads | Finish update

## Users

### User

sowmya bala

User Detail

Name: sowmya bala

Alias: sbala

Email: 2k20ce179@kiot.ac.in (Verify)

Username: 2k21it@kiot.ac.in

Nickname: User169616771282564526

Title: worker

Company: kiot bank

Department:

Division:

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

Locale: English (India)

Language: English

Delegated Approver: Manager

Receive Approval Request Emails: Only if I am an approver

Federation ID:

App Registration: One-Time Password Authenticator

App Registration: Salesforce Authenticator

Role: Salesforce Platform

User License: Manager

Active:

Marketing User:

Offline User:

Knowledge User:

Flow User:

Service Cloud User:

Site.com Contributor User:

Site.com Publisher User:

WDC User:

Mobile Push Registrations: View

Data.com User Type:

Accessibility Mode (Classic Only):

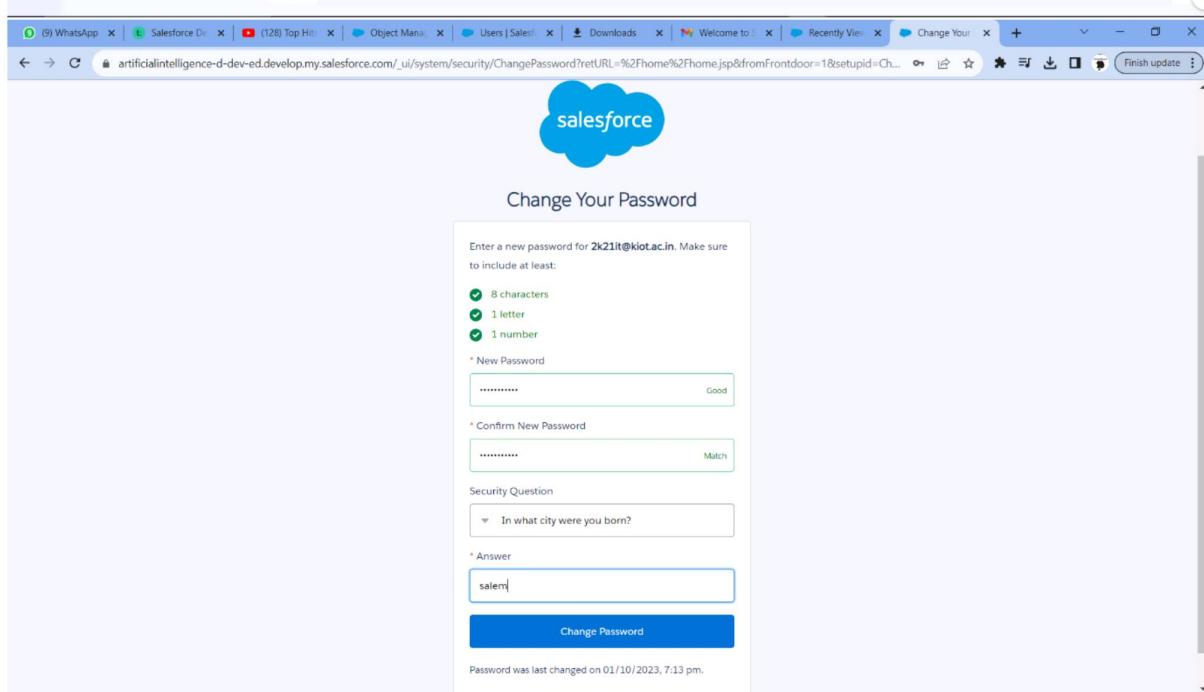
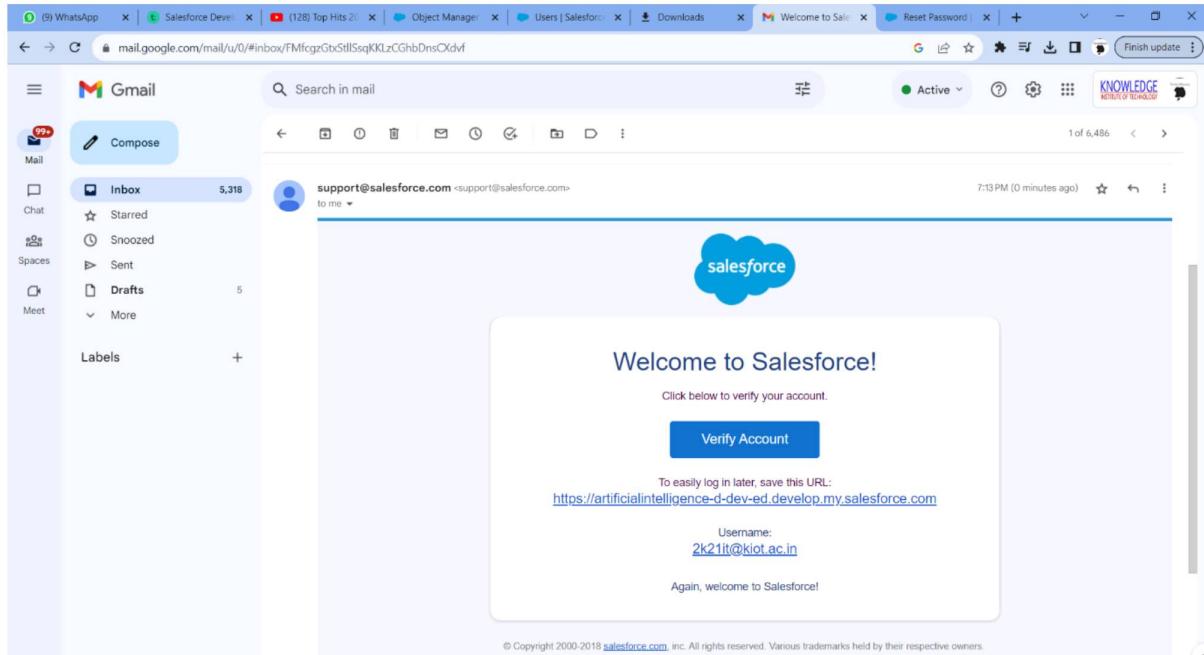
Debug Mode:

High-Contrast Palette on Charts:

Load Lightning Pages While Scrolling:

Salesforce CRM Content User:

User Profile Help for this Page



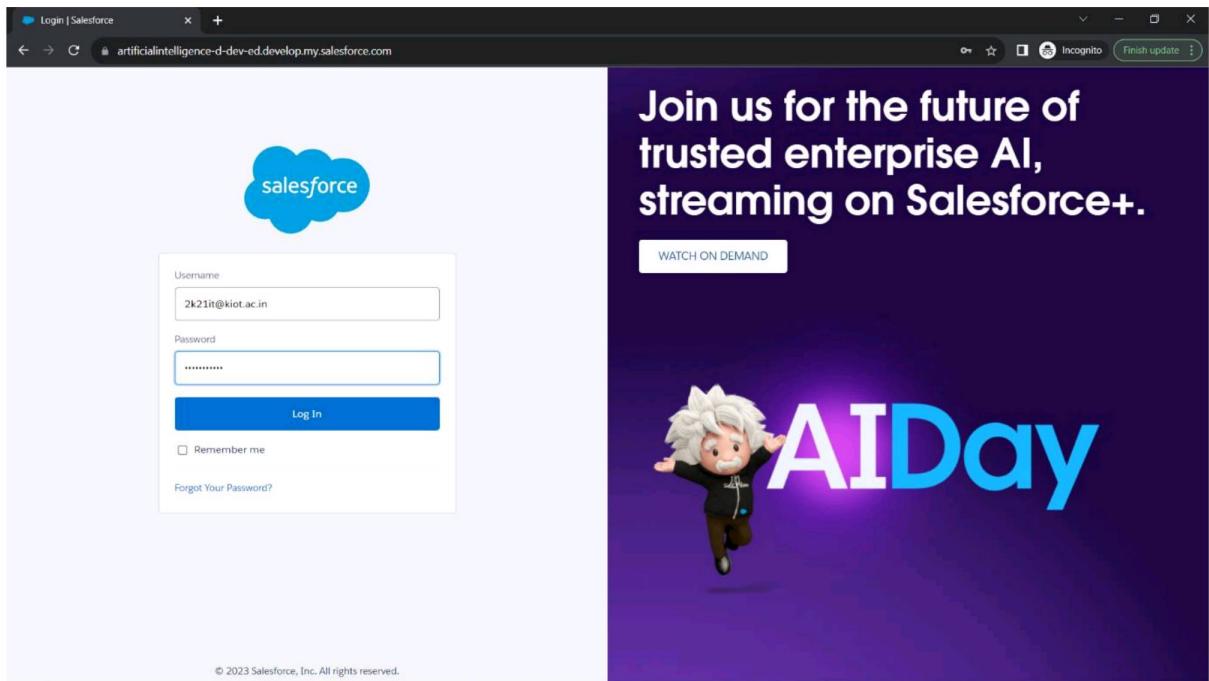
Login | Salesforce

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

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

WATCH ON DEMAND

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This screenshot shows the Salesforce login interface. On the left, there's a standard login form with fields for Username (2k21it@kiot.ac.in) and Password, a 'Log In' button, and checkboxes for 'Remember me' and 'Forgot Your Password?'. On the right, a large purple banner features a cartoon character with white hair and a black hoodie, jumping in front of the text 'AI Day' in large, bold letters. Above the character, the text reads 'Join us for the future of trusted enterprise AI, streaming on Salesforce+'. A 'WATCH ON DEMAND' button is located at the top right of the banner. At the bottom left of the banner, it says '© 2023 Salesforce, Inc. All rights reserved.'

Recently Viewed | Bank | Salesfo

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

Search...

kiot

Bank customers Home

Recently Viewed

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

Bank Name ↓

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

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

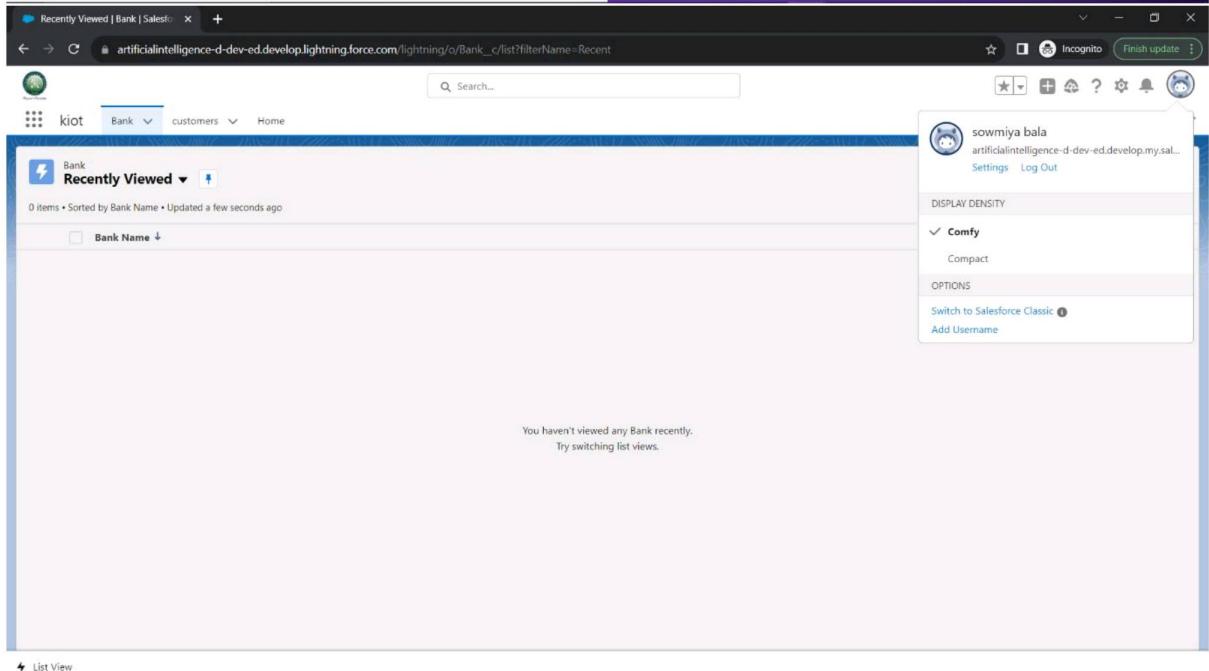
DISPLAY DENSITY

✓ Comfy

Compact

OPTIONS

Switch to Salesforce Classic Add Username



This screenshot shows the Salesforce Lightning interface. It displays a 'Recently Viewed' list for the 'Bank' object. The list is currently empty, showing the message 'You haven't viewed any Bank recently.' and 'Try switching list views.' To the right of the list is a user profile sidebar for 'sowmiya bala' from 'artificialintelligence-d-dev-ed.develop.my.salesforce.com'. The sidebar includes options for 'Settings' and 'Log Out', and a 'DISPLAY DENSITY' dropdown set to 'Comfy'. Other options like 'Compact' and 'OPTIONS' are also visible. At the bottom of the sidebar, there are links to 'Switch to Salesforce Classic' and 'Add Username'.

New Bank | Salesforce

Recently Viewed ▾

Bank Name

New Bank

Information

\* = Required Information

Bank Name	boi
Owner	sowmiya bala
phoneno	0897754534

Cancel Save & New Save

List View

This screenshot shows the 'New Bank' form in Salesforce Lightning. The 'Bank Name' field is populated with 'boi'. The 'Owner' field shows 'sowmiya bala'. The 'phoneno' field contains '0897754534'. The 'Save' button at the bottom right is highlighted in blue.

New customer | Salesforce

Recently Viewed ▾

customer Name

New customer

Information

\* = Required Information

customer Name	madhu
Bank	boi

Cancel Save & New Save

List View

This screenshot shows the 'New customer' form in Salesforce Lightning. The 'customer Name' field is populated with 'madhu'. The 'Bank' field shows 'boi'. The 'Save' button at the bottom right is highlighted in blue.

madhu | customer | Salesforce

artificialintelligence-d-dev-ed.lightning.force.com/lightning/r/customer\_c/a025j00000f0YfaAAM/view

customer madhu was created.

Related Details

customer Name  
madhu

Bank  
boi

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

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

List View

WhatsApp

Salesforce Developer Session 2

(128) Top Hits 2023

Profiles | Salesforce

Welcome to Salesforce: Verify

Setup

Home Object Manager

Quick Find

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Hyperforce Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

ADMINISTRATION

Users

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

Profiles

All Profiles

Action Profile Name User License

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

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

1.7 of 7 0 Selected

<< Previous Next >>

Page 1 of 1

javascript:srcUp(%27%2F\_ur%2Fperm%2Fu%2Fprofile%2Fe%2Fid%3D00e5j00003uvKu%26setupid%3DEnhancedProfiles%26retURL%3D%252F00e%253Ffc%253D0085j00000c7U%2526rolodexIndex%253D18%2526page%253D1%2526sdp%253D0p1%26sdtp%

Salesforce Developer Session 2 | 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: salesmanager

Save Cancel

Salesforce Developer Session 2 | 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: salesmanage

Profile Detail

Name: salesmanage	User License: Salesforce Platform	Custom Profile: ✓
Description:	Created By: GOPAL_S 01/10/2023, 7:19 pm	Modified By: GOPAL_S 01/10/2023, 7:19 pm

Page Layouts

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

Salesforce Developer Session 2 | 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 Edit salesmanage

Name: salesmanage User License: Salesforce Platform Description: Custom Profile: ✓

Custom App Settings

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

Service Provider Access

Tab Settings: Overwrite users' personal tab customizations

Standard Tab Settings: Home Default On Learning: Default On

Required Information: 1 Required Information

Salesforce Developer Session 2 | 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

Contact Point Email: ✓ ✓ ✓ ✓ ✓

User External Credentials: ✓ ✓ ✓ ✓ ✓

Custom Object Permissions

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

Enhancement Requests: ✓ ✓ ✓ ✓ ✓

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

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

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

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

	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
	<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"/>

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

Require a minimum 1 day password lifetime

Don't immediately expire links in forgot password emails

Save | Save & New | Cancel

Salesforce Developer Session 2 | Users | Salesforce | Welcome to Salesforce: Verify...

Setup Home Object Manager

Users

Permission Set Groups  
Permission Sets  
Profiles  
Public Groups  
Queues  
Roles  
**User Management Settings**  
Users  
Feature Settings  
Data.com  
Prospector  
Service  
Embedded Service  
Messaging for In-App and Web User Verification  
User Interface  
Action Link Templates  
Actions & Recommendations  
App Menu

New User

User Edit

General Information

First Name	<input type="text"/>
Last Name	<input type="text"/>
Alias	<input type="text"/>
Email	<input type="text"/>
Username	<input type="text"/>
Nickname	<input type="text"/>
Title	<input type="text"/>
Company	<input type="text"/>
Department	<input type="text"/>
Division	<input type="text"/>

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:

Salesforce Developer Session 2 | (128) Top Hits 2023 | New Po... | Users | Salesforce | Welcome to Salesforce: Verify yo... | + | Finish update

Cloud Search Setup

Setup Home Object Manager

Users

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: User169618842428654192  
Title: worker  
Company: kiot bank  
Department: Sales  
Division:

Role: <None Specified>  
User License: Salesforce Platform  
Profile: salesmanager  
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:

New User

User Edit Save Save & New Cancel

Help for this Page

Salesforce Developer Session 2 | (128) Top Hits 2023 | New Po... | Users | Salesforce | Welcome to Salesforce: Verify yo... | + | Finish update

Cloud Search Setup

Setup Home Object Manager

Users

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 Po... | Users | Salesforce | Welcome to Salesforce: Verify y... | + | Finish update

Cloud Search Setup

Setup Home Object Manager

Q user

v Users

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

User Management Settings

Users

v Feature Settings

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

v User Interface

- Action Link Templates
- Actions & Recommendations
- App Menu

SETUP Users

Mailing Address

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

Single Sign On Information

Federation ID	
---------------	--

Locale Settings

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

Approver Settings

Delegated Approver	
Manager	
Receive Approval Request Emails	Only if I am an approver
<input checked="" type="checkbox"/> Generate new password and notify user immediately	

Save Save & New Cancel

Q user

v Users

madhu b

User Detail

Name	madhu b	Role	Salesforce Platform
Alias	mb	User License	salemanager
Email	2k20cse179@knot.ac.in (Verify) <a href="#">[i]</a>	Profile	<input checked="" type="checkbox"/>
Username	2k20cse179@knot.ac.in	Active	<input checked="" type="checkbox"/>
Nickname	User16961684242065419206	Marketing User	<input type="checkbox"/>
Title	woker	Offline User	<input type="checkbox"/>
Company	knot bank	Flow User	<input type="checkbox"/>
Department	Sales	Service Cloud User	<input type="checkbox"/>
Division		Site.com Contributor User	<input type="checkbox"/>
Address	4/194, aryampalayam, uthamasolapuram .., Paraiakkadu, salem- 636308	Site.com Publisher User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	WDC User	<input type="checkbox"/>
Locale	English (India)	Mobile Push Registrations	<a href="#">VIEW</a>
Language	English	Data.com User Type	<a href="#">[i]</a>
Delegated Approver		Accessibility Mode (Classic Only)	<input type="checkbox"/>
Manager		Debug Mode	<input type="checkbox"/>
Receive Approval Request Emails	Only if I am an approver	High-Contrast Palette on Charts	<input type="checkbox"/>
Federation ID		Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>
App Registration: One-Time Password Authenticator		Enhanced CRM Contact User	<input type="checkbox"/>

User ProfileHelp for this Page [\[i\]](#)

Salesforce Developer Session 2 | (128) Top Hits 2023 | New Po... | Users | Salesforce | Welcome to Salesforce: Verify y... | + | Finish update

Cloud Search Setup

Setup Home Object Manager

Q user

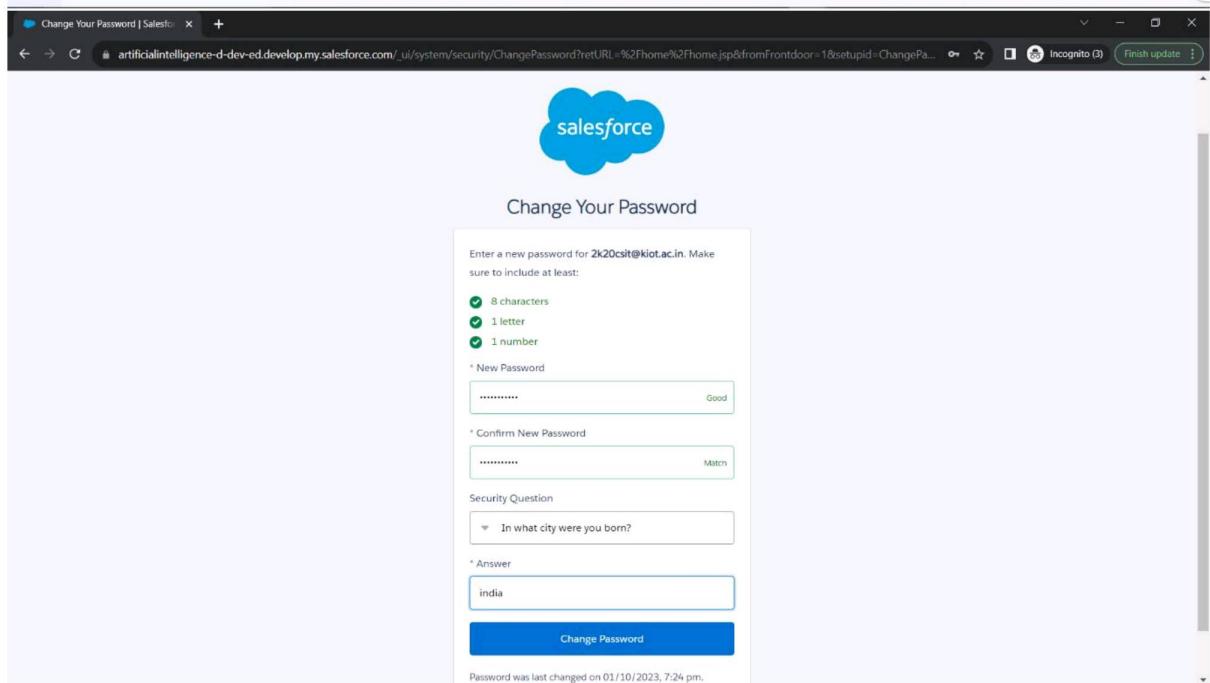
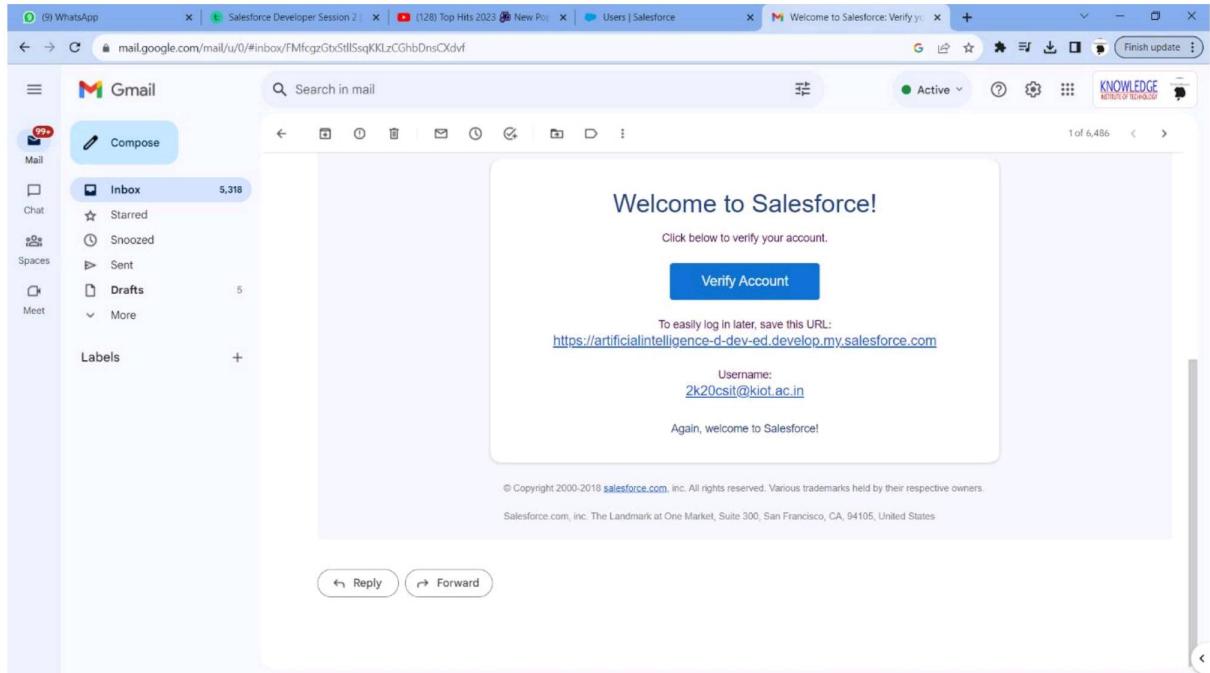
v Users

madhu b

User Detail

Name	madhu b	Role	Salesforce Platform
Alias	mb	User License	salemanager
Email	2k20cse179@knot.ac.in (Verify) <a href="#">[i]</a>	Profile	<input checked="" type="checkbox"/>
Username	2k20cse179@knot.ac.in	Active	<input checked="" type="checkbox"/>
Nickname	User16961684242065419206	Marketing User	<input type="checkbox"/>
Title	woker	Offline User	<input type="checkbox"/>
Company	knot bank	Flow User	<input type="checkbox"/>
Department	Sales	Service Cloud User	<input type="checkbox"/>
Division		Site.com Contributor User	<input type="checkbox"/>
Address	4/194, aryampalayam, uthamasolapuram .., Paraiakkadu, salem- 636308	Site.com Publisher User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	WDC User	<input type="checkbox"/>
Locale	English (India)	Mobile Push Registrations	<a href="#">VIEW</a>
Language	English	Data.com User Type	<a href="#">[i]</a>
Delegated Approver		Accessibility Mode (Classic Only)	<input type="checkbox"/>
Manager		Debug Mode	<input type="checkbox"/>
Receive Approval Request Emails	Only if I am an approver	High-Contrast Palette on Charts	<input type="checkbox"/>
Federation ID		Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>
App Registration: One-Time Password Authenticator		Enhanced CRM Contact User	<input type="checkbox"/>

User ProfileHelp for this Page [\[i\]](#)



Recently Viewed | Bank | Salesforce

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

Incognito (3) Finish update

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

This screenshot shows the 'Recently Viewed' list for Banks in the Salesforce Lightning Experience. The interface includes a header with the page title and URL, a search bar, and navigation links for 'Bank' and 'customers'. The main area displays a table with columns for 'Bank Name' and other details. A message at the bottom indicates no recent activity. A 'List View' link is visible at the bottom left.

Recently Viewed | customers | Salesforce

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

Incognito (3) Finish update

customers Recently Viewed

0 items • Updated a few seconds ago

customer Name

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

List View

This screenshot shows the 'Recently Viewed' list for customers in the Salesforce Lightning Experience. The layout is similar to the Banks list, with a header, search bar, and navigation links. The main area shows a table with 'customer Name' as the primary column. A message at the bottom indicates no recent activity. A 'List View' link is visible at the bottom left.

(9) WhatsApp

Salesforce Developer Session

(128) Top Hits 2023

Permission Sets | Salesforce

Welcome to Salesforce: Vi

Reset Password | Salesforce

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

Setup Home Object Manager

Search Setup

Permission Sets

Help for this Page

Permission Sets

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

In addition, you can use the 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"/>	New		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
<input type="checkbox"/>	Del   Clone	Access to activity	B2B Buyer Permission Set One Seat
<input type="checkbox"/>	Clone	Buyer	Includes all Buyer capabilities, and allows access to manage carts an...
<input type="checkbox"/>	Clone	Buyer Manager	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/>	Clone	CRM User	Denotes that the user is a Sales Cloud or Service Cloud user.
<input type="checkbox"/>	Clone	Commerce Admin	Allow access to commerce admin features
<input type="checkbox"/>	Clone	Contact Center Admin	Manage Service Cloud Voice contact centers that use Amazon Conn...
<input type="checkbox"/>	Clone	Contact Center Agent	Access agent features in Service Cloud Voice contact centers tha...
<input type="checkbox"/>	Clone	Contact Center Supervisor	Access supervisor features in Service Cloud Voice contact centers th...
<input type="checkbox"/>	Del   Clone	Experience Profile Manager	Salesforce
<input type="checkbox"/>	Clone	Facility Manager	Facility Manager
<input type="checkbox"/>	Clone	FieldServiceMobileStandardPermSet	Give your mobile workforce access to the Field Service mobile app. S...
<input type="checkbox"/>	Clone	Merchandiser	Allow access to commerce merchandising features.
<input type="checkbox"/>	Clone	Order Management Agent	Read Access to all entities enabled by Order Management
<input type="checkbox"/>	Clone	Order Management Operations Manager	Access to all features enabled by Order Management
<input type="checkbox"/>	Clone	Order Management Shopper	Limited access to Order Management features for Self Service

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

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

This screenshot shows the 'Permission Sets' list in the Salesforce Setup interface. The left sidebar contains navigation links for users, feature settings, and user interface. The main area displays a table of permission sets with columns for action, label, description, and license. A message at the top right provides help for the page. The bottom of the screen shows pagination and a URL.

## 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 following details:

- Page Title:** Permission Sets
- Left Navigation:** Shows sections like Users, Feature Settings, Data.com, Service, and User Interface.
- Content Area:**
  - Section:** Permission Sets
  - Description:** On this page you can create, view, and manage permission sets.
  - Actions:** All Permission Sets, Edit, Delete, Create New View.
  - Table:** Displays a list of permission sets with columns: Action, Permission Set Label, Description, and License.
  - Table Headers:** Action, Permission Set Label, Description, License.
  - Table Data:** Includes rows for B2B Buyer Permission Set One Seat, B2B Buyer Manager Permission Set One Seat, CRM User, Commerce Admin, Service Cloud Voice User, Service Cloud Voice License Seat, etc.
  - Pagination:** 1-25 of 29, 0 Selected.
  - Page Footer:** Page 1 of 2.

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

## Permission Sets

**Create**

Enter permission set information

Label:  API Name:  Description:

Session Activation Required:

Select the type of users who will use this permission set

Who will use this permission set?

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

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

License:

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

## Permission Sets

**Create**

Enter permission set information

Label:  salesmanager API Name:  Salesmanager Description:

Session Activation Required:

Select the type of users who will use this permission set

Who will use this permission set?

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

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

License:

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

## Permission Sets

**salesmanager**

Find Settings | Clone | Delete | Edit Properties | Manage Assignments

**Permission Set Overview**

Description	API Name	Namespace Prefix
License	salesmanager	
Session Activation Required	<input type="checkbox"/>	
Last Modified By	GOPALS_01/10/2023, 7:29 pm	Created By GOPALS_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

Screenshot of the Salesforce Setup interface showing the Object Settings for the 'salesmanager' permission set.

**Object Settings**

Object Name	Object Permissions	Total Fields	Tab Settings
Accounts	No Access	40	--
AI Insight Reasons	No Access	--	--
AI Record Insights	No Access	--	--
Alternative Payment Methods	No Access	27	--
API Anomaly Event Stores	No Access	14	--
Age 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 Tab Settings for the 'Bank' object in the 'salesmanager' permission set.

**Tab Settings**

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

**Object Permissions**

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

**Field Permissions**

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

Salesforce Developer Session | (128) Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce: Version 43.0 | Reset Password | Salesforce | Finish update

## Permission Sets

Permission Set: salesmanager

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"/>

Tab Settings:

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

Save Cancel

Video Tutorial | Help for this Page

Salesforce Developer Session | (128) Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce: Version 43.0 | Reset Password | Salesforce | Finish update

## salesmanager

Current Assignments

No assignments defined.

Add Assignment

Salesforce Developer Session | (128) Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce: Version 43.0 | Reset Password | Salesforce

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

### 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	

Next

Salesforce Developer Session | (128) Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce: Version 43.0 | Reset Password | Salesforce

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

### Select an Expiration Option For Assigned Users

No expiration date

Specify the expiration date

Time Zone
Select a time zone...

### Selected Users

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

Back Assign

The screenshot shows two open browser tabs. The top tab is the Salesforce Setup interface, specifically the 'User Management Settings' section under 'Users'. A success message box is displayed: '1 assignments were successful.' with a green checkmark icon. The message is 'salesmanager' and it was assigned to 'madhu b'. The bottom tab shows the 'Recently Viewed' list view for the 'customers' object. The list is empty, displaying the message: 'You haven't viewed any customers recently. Try switching list views.' A context menu is open over the list, titled 'LIST VIEW CONTROLS', with options like 'New', 'Clone', 'Rename', 'Sharing Settings', 'Show List Filters', 'Select Fields to Display', and 'Delete'.

```
javascript:void(0)
```

**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 category. The left sidebar includes sections for Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and Users. Under the Users section, 'Prospector Users' is highlighted. The main content area displays a table titled 'Profiles' with columns for Action, Profile Name, User License, and Custom. The table lists various profiles such as Analytics Cloud Integration User, Authenticated Website, Chatter External, Chatter Free, Chatter Moderator, Contract Manager, Cross Org Data Proxy User, Custom Marketing Profile, Custom Sales Profile, Custom Support Profile, Customer Community Login User, Customer Community Plus Login, and Customer Community Plus User. The 'User License' column shows values like Analytics Cloud Integration User, Authenticated Website, Chatter External, Chatter Free, Chatter Moderator, Contract Manager, Cross Org Data Proxy User, Salesforce, XOrg Proxy User, Customer Community Login, and Customer Community Plus. The 'Custom' column contains several checked boxes. At the bottom of the table, it says '1-25 of 41' and 'Page 1 of 2'. The status bar at the bottom right indicates it's 08:20 AM on 01-10-2023.

### 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 overlaid on the Salesforce Setup interface. The dialog has a header 'Clone Profile' and a sub-header 'Enter the name of the new profile.' It contains a message 'You must select an existing profile to clone from.' Below this, there are three input fields: 'Existing Profile' set to 'Standard Platform User', 'User License' set to 'Salesforce Platform', and 'Profile Name' set to 'Jaga'. At the bottom of the dialog are 'Save' and 'Cancel' buttons. The background setup interface is identical to the previous screenshot, showing the Profiles list and system status.

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. A specific profile named "Jaga" is selected. The "Profile Detail" section displays the profile's name (Jaga), user license (Salesforce Platform), and creation date (01/10/2023, 8:21 am). It also shows the modified by user (Jagadesh S) and the modification date (01/10/2023, 8:21 am). The "Custom Profile" checkbox is checked. Below this, the "Page Layouts" section lists various standard object layouts such as Global, Email Application, Home Page Layout, Account, Alternative Payment Method, and Appointment Invitation, each with their respective global layouts and operating hours assignments. The status bar at the bottom indicates it's 08:21 AM on 01-10-2023.

This screenshot shows the continuation of the Salesforce Setup Profiles page. It includes sections for "Custom Object Permissions" and "Session Settings". In the "Custom Object Permissions" section, checkboxes are used to enable or disable permissions for various objects like Communication Subscription Consents, Locations, Party Consents, Push Topics, Sellers, and Streaming Channels. Under "Session Settings", session timeout preferences are set to 2 hours of inactivity, and session security levels are configured. The status bar at the bottom shows the date as 01-10-2023 and the time as 08:21 AM.

Profiles | Salesforce

Search Setup

Setup Home Object Manager

Users

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

Custom Object Permissions

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

Session Settings

Setting	Value
Session Times Out After	2 hours of inactivity
Session Security Level Required at Login	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"/>

25°C Partly sunny

ENG IN 08:21 AM 01-10-2023

The screenshot shows the Salesforce Setup interface under the Profiles section. It displays a grid of profiles with various permission settings. Below this is a 'Custom Object Permissions' section for providers and resources, followed by 'Session Settings' with options for session timeout and security level. The bottom status bar shows weather information and system time.

Profiles | Salesforce

Search Setup

Setup Home Object Manager

Users

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

Profile Edit

Jaga

Help for this Page

Set the permissions and page layouts for this profile.

Profile Edit

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

Custom App Settings

App	Visible	Default	App	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_App_launcher)	<input type="checkbox"/>	<input checked="" type="radio"/>	WDC (standard_Work)	<input type="checkbox"/>	<input checked="" type="radio"/>
Hive App (Hive_App)	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>			

Service Provider Access

Tab Settings

Overwrite users' personal tab customizations

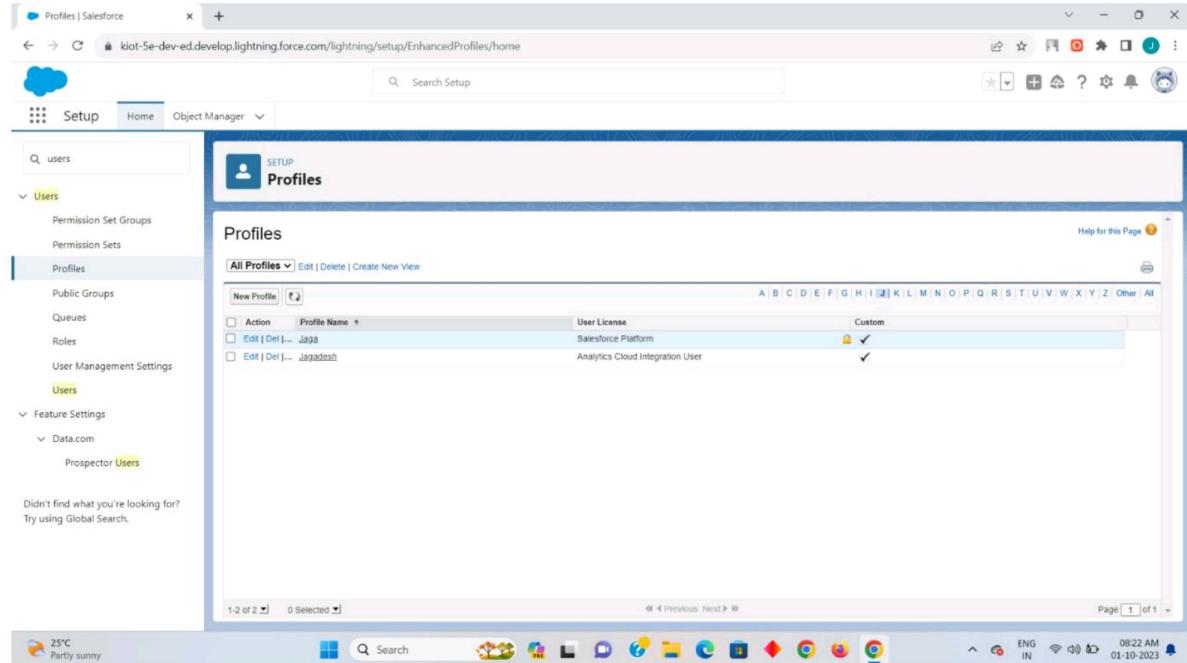
25°C Partly sunny

ENG IN 08:21 AM 01-10-2023

The screenshot shows the 'Profile Edit' screen for the 'Jaga' profile. It includes fields for Name, User License, and Description, along with a 'Custom Profile' checkbox. Below this are sections for 'Custom App Settings' and 'Service Provider Access', each with tables showing visibility and default status for various apps. The bottom status bar shows weather information and system time.

## Step 4

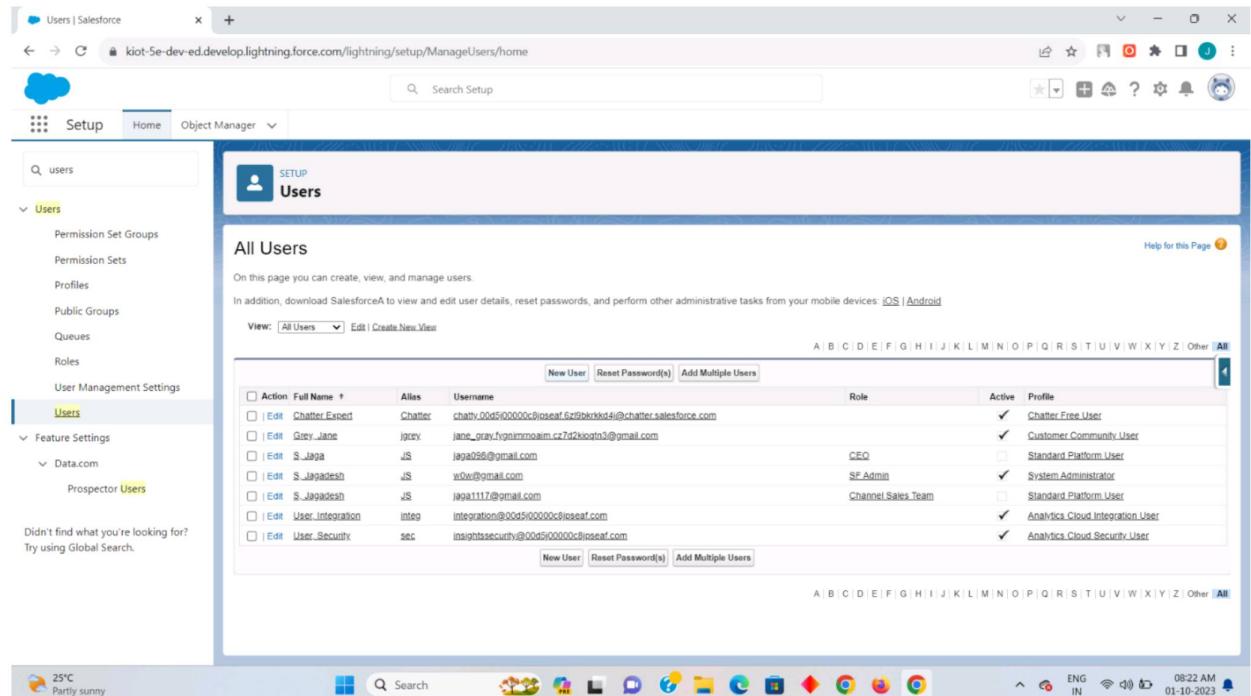
Now you can preview your created profile on the profile option here my profile name jaga has been created with the access of read,create,edit along with view on it



The screenshot shows the Salesforce Setup interface under the Profiles section. The left sidebar shows various user management options like Public Groups, Queues, Roles, and User Management Settings. The main content area displays a table titled 'Profiles' with two entries: 'Edit | Del ... Jaga' and 'Edit | Del ... Jagadeesh'. The 'User License' column indicates 'Salesforce Platform' for Jaga and 'Analytics Cloud Integration User' for Jagadeesh. Both profiles have the 'Custom' checkbox checked. The bottom of the page shows navigation links for 'New Profile', 'Edit', 'Delete', and 'Create New View'.

## 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 lists various user management options. The main content area displays a table titled 'All Users' with eight entries. The users are: Chatter\_Expert, Grey\_Jane, S.Jaga, S.Jagadeesh, User\_Integration, User\_Security, Jane\_Grey, and J.S. The 'Profile' column for all users shows 'Jaga' as the assigned profile. The 'Active' column shows checkboxes for most users, except for 'User\_Security' which is checked. The bottom of the page shows navigation links for 'New User', 'Reset Password(s)', and 'Add Multiple Users'.

**New User**

User Edit

General Information

First Name	Jagadesh11
Last Name	S
Alias	J
Email	jewr123@gmail.com
Username	jewr123@gmail.com
Nickname	User16961287514490592
Title	
Company	
Department	
Division	

Role: Director, Channel Sales  
User License: Salesforce Platform  
Profile: Standard Platform User  
Active: None

**New User**

User Edit

General Information

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

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

**All Users**

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

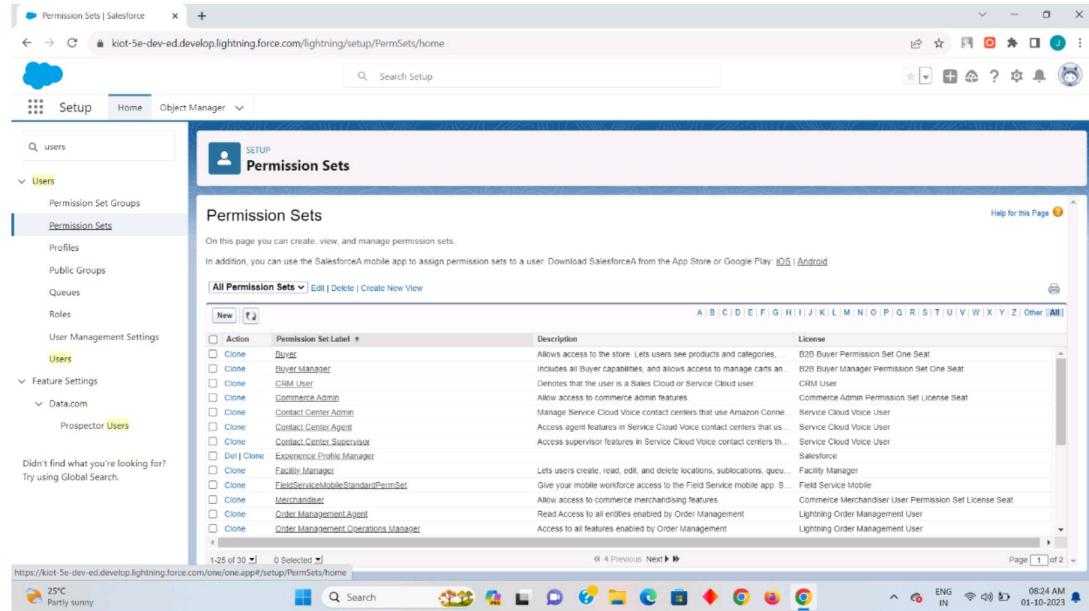
Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Edit S_Jagadesh	J	jewr059@gmail.com	CEO	<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	Edit S_Jagadesh0	J	w0e@mail.com	SE Admin	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Edit S_Jagadesh1	J	jewr117@gmail.com	Channel Sales Team	<input checked="" type="checkbox"/>	Standard Platform User
<input checked="" type="checkbox"/>	Edit S_Jagadesh11	J	jewr123@gmail.com	Director, Channel Sales	<input checked="" type="checkbox"/>	Marketing Team
<input checked="" type="checkbox"/>	Edit S_Jagadesh22	J	jaa1@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Marketing Team

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.

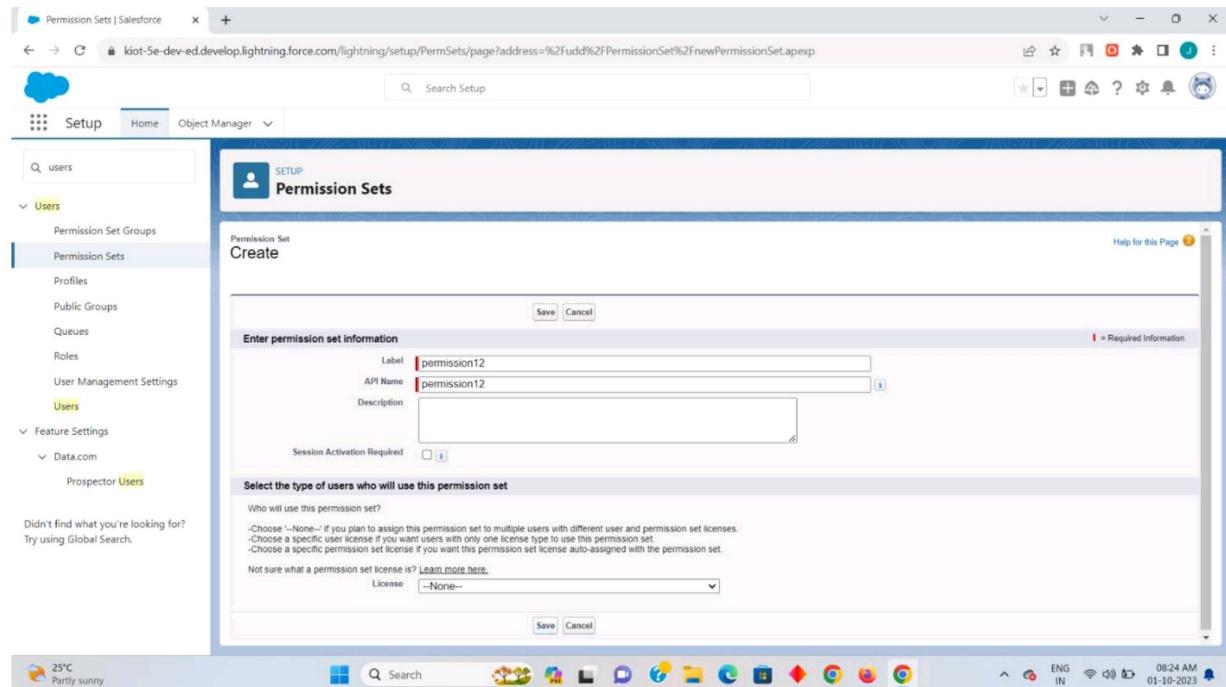
## Step 6:

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' under 'Permission Set Groups'. The main area displays a table of permission sets with columns for Action, Permission Set Label, Description, and Licensee. The table includes rows for various roles like B2B Buyer, CRM User, and Service Cloud Voice User. A search bar at the top right says 'Search Setup'.



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' with fields for 'Label' (set to 'permission12'), 'API Name' (set to 'permission12'), and 'Description'. Below this is a section titled 'Select the type of users who will use this permission set' with a note about session activation. At the bottom, there's a 'License' dropdown set to '-None-' and a 'Save' button.

Permission Sets | Salesforce

Setup Home Object Manager

Users

Permission Set Groups

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

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

25°C Partly sunny

Search Setup

## Permission Sets

permission12

API Name: permission12  
Namespace Prefix: permission12  
Created By: Jyotiadev\_S 01/10/2023, 8:24 am

Permission Set Overview

Description	License	Session Activation Required	Last Modified By
			Jyotiadev_S, 01/10/2023, 8:24 am

Apps

Assigned Apps

Assigned Connected Apps

Object Settings

App Permissions

Apex Class Access

Visualforce Page Access

External Data Source Access

Video Tutorial | Help for this Page

ENG IN 08:24 AM 01-10-2023

Permission Sets | Salesforce

Setup Home Object Manager

Users

Permission Set Groups

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

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

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Search Setup

## Permission Sets

permission12

Object Settings

Object Name: Account

Object Permissions	Total Fields	Tab Settings
No Access	9	—
No Access	44	—
No Access	—	—
No Access	—	—
No Access	27	—
No Access	14	—
No Access	—	—
No Access	—	—
No Access	3	—
No Access	17	—
—	4	—
No Access	—	—
No Access	—	—
No Access	6	—
No Access	30	—
No Access	18	—

Video Tutorial | Help for this Page

ENG IN 08:25 AM 01-10-2023

Permission Sets | Salesforce

Setup Home Object Manager

Users

Permission Set Groups

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

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

25°C Partly sunny

Search Setup

## Permission Sets

permission12

Object Settings

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

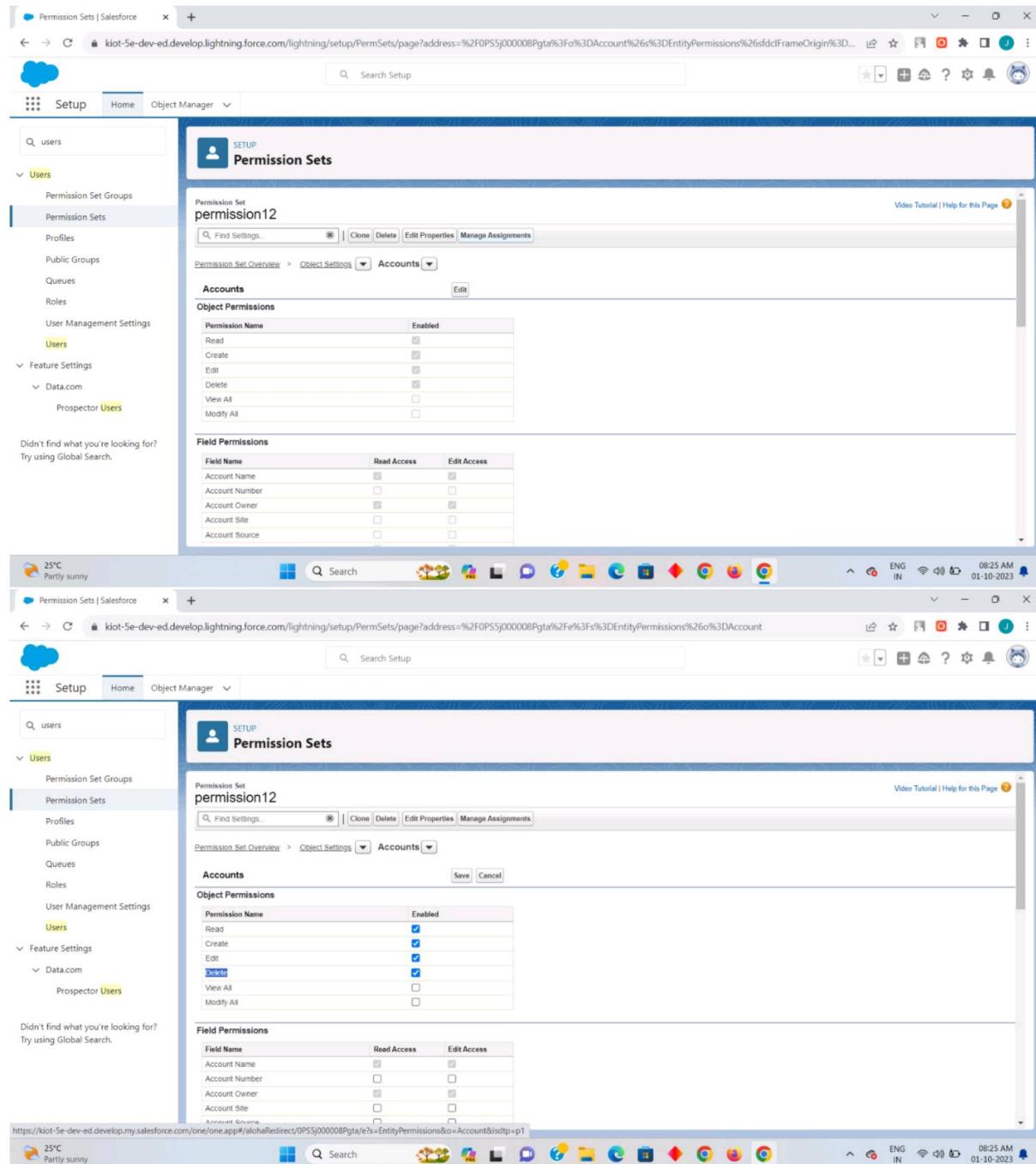
Field Name	Read Access	Edit Access
Account Name	<input type="checkbox"/>	<input type="checkbox"/>
Account Number	<input type="checkbox"/>	<input type="checkbox"/>
Account Owner	<input type="checkbox"/>	<input type="checkbox"/>
Account Site	<input type="checkbox"/>	<input type="checkbox"/>
Account Source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

Video Tutorial | Help for this Page

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 navigation includes 'Permission Set Groups' (selected), 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', and 'Users' (selected). Under 'Users', there are sections for 'Feature Settings', 'Data.com', and 'Prospector Users'. A note at the bottom says 'Didn't find what you're looking for? Try using Global Search.' The main content area displays the 'Permission Sets' page for 'permission12'. It shows 'Object Settings' selected for 'Accounts'. In the 'Object Permissions' section, 'Delete' is checked under 'Enabled'. In the 'Field Permissions' section, 'Account Name', 'Account Number', 'Account Owner', 'Account Site', and 'Account Source' are listed with both 'Read Access' and 'Edit Access' checked. There are 'Save' and 'Cancel' buttons at the top right of the main form. The status bar at the bottom indicates '25°C Partly sunny' and the date '01-10-2023'.

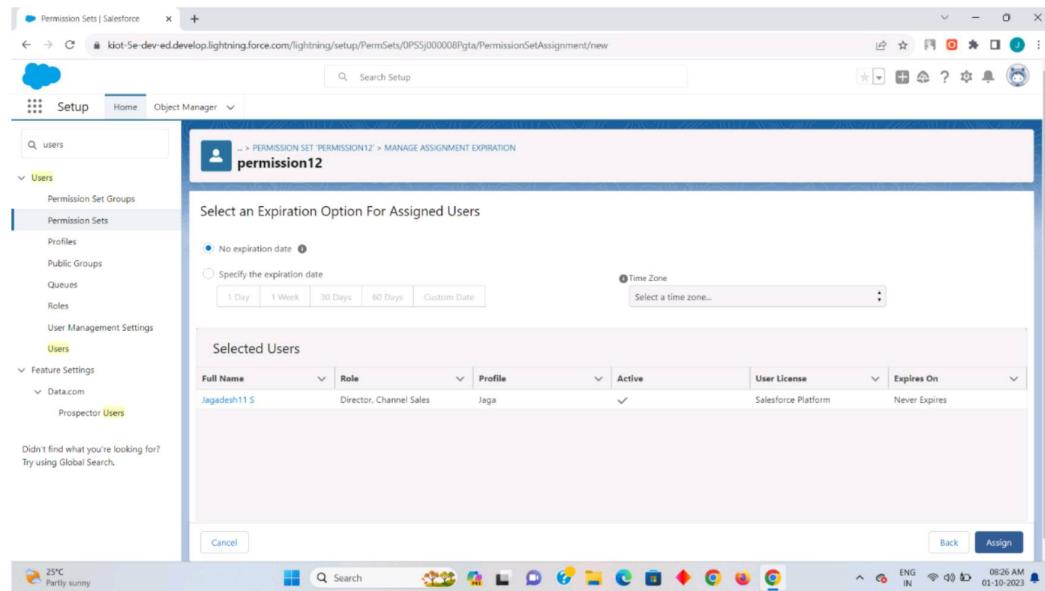
## Step 8

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.

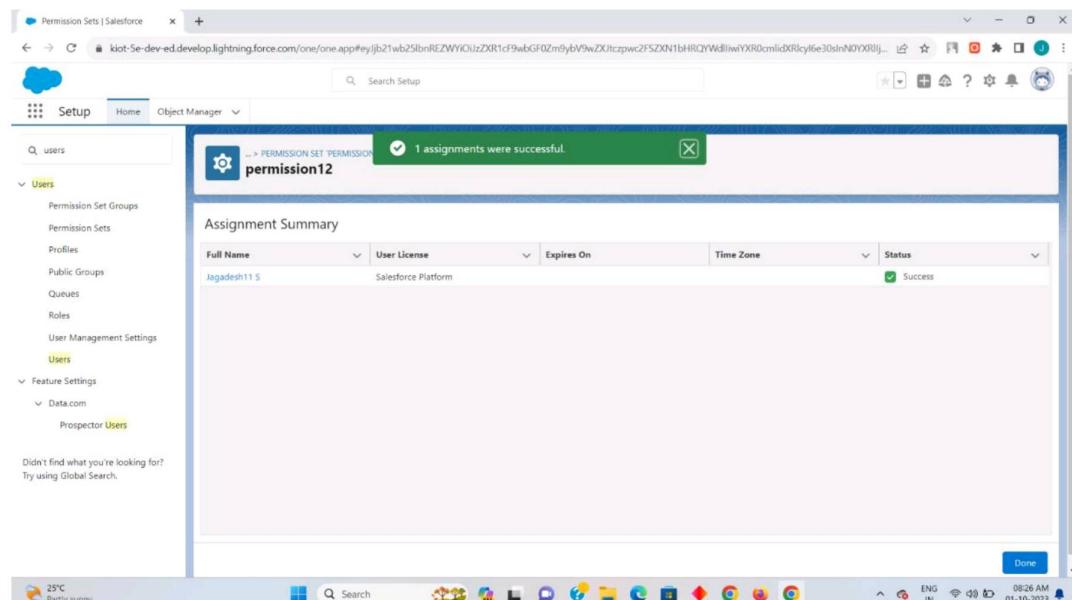
The screenshots illustrate the process of assigning users to a permission set:

- Screenshot 1:** Shows the "Current Assignments" screen for a permission set named "permission12". It displays a cactus icon and a message stating "No assignments defined."
- Screenshot 2:** Shows the "Select Users to Assign" dialog box. A search bar at the top contains the text "jagadesh". The results list four users: Jagadesh S, Jagadesh S, Jagadesh11 S, and Jagadesh22 S. The first user, Jagadesh S, has a checked checkbox in the "Active" column.
- Screenshot 3:** Shows the same "Select Users to Assign" dialog box, but now the user "Jagadesh11 S" has a checked checkbox in the "Active" column, while the others are unchecked.

Click on next.



Now click on Assign.



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

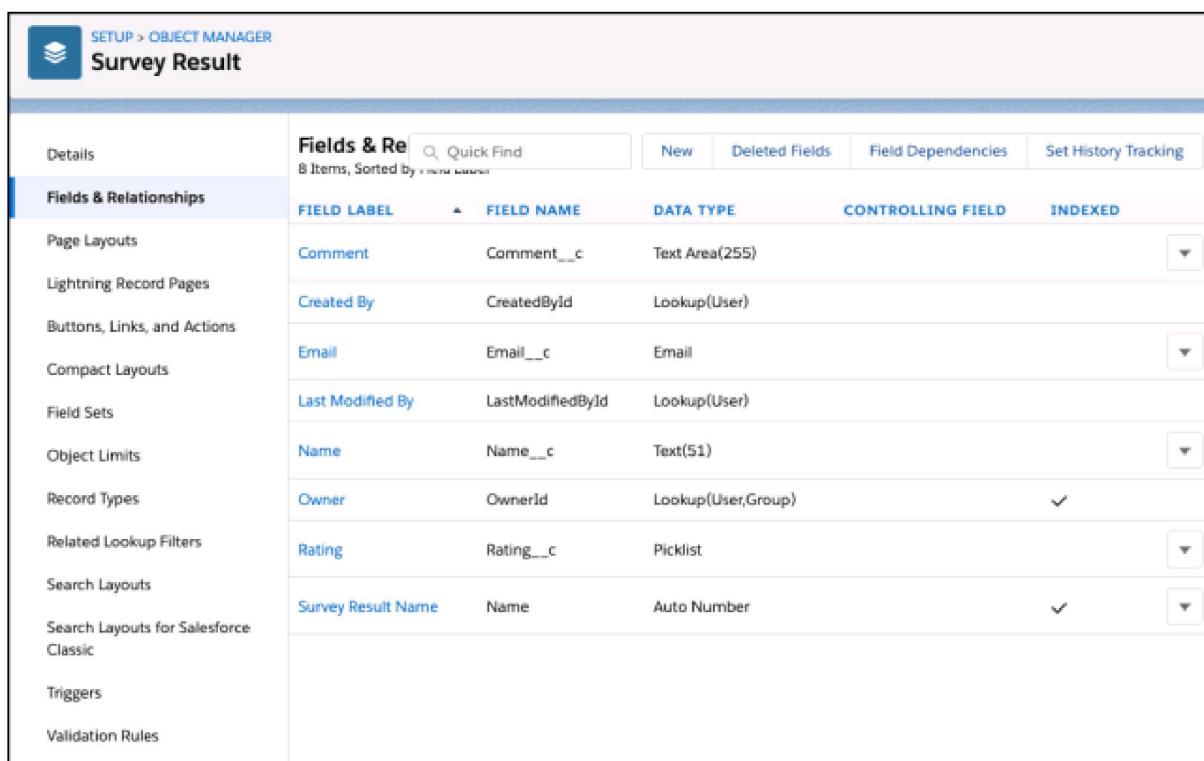
#### 4.Create a screen flow for a basic survey to fill in the details for any form.

##### 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 top navigation bar includes "SETUP > OBJECT MANAGER" and the object name "Survey Result". Below the header, there are tabs for "Details" and "Fields & Relationships". The "Fields & Relationships" tab is selected, displaying 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.

The screenshot shows the 'Email Template' page in Salesforce. At the top, there's a header with the title 'Email Template' and 'Thank You Email - Survey'. On the right, there are buttons for 'Edit in Builder', 'Edit', 'Clone', and a dropdown menu. Below the header, there are two tabs: 'Details' (which is selected) and 'Related'. The 'Information' section contains fields for 'Email Template Name' (set to 'Thank You Email - Survey'), 'Related Entity Type' (set to 'Survey Result'), 'Description' (empty), and 'Folder' (set to 'Public Email Templates'). A checkbox labeled 'Made in Email Template Builder' is checked. The 'Message Content' section includes a 'Subject' field with 'Thank You For Completing Our Survey!' and an 'HTML Value' rich text area. The HTML content starts with 'Hi {{Survey\_Result\_\_c.Name\_\_c}},' followed by a message of thanks for participating in the survey, mentioning the survey results will be shared through the State Survey Agency. It also expresses gratitude for the participant's time, honest information, and thoughtful suggestions. The message concludes with 'Thanks, Automation Champion'. The 'Additional Information' section at the bottom shows 'Created By' Rakesh Gupta, 'Created Date' 12/21/2020, 4:23 PM, and 'Last Modified By' Rakesh Gupta, 'Last Modified Date' 12/21/2020, 4:32 PM.

## Step 3: Create an Email Alert

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

Edit Email Alert  
Survey - Thank You Email

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	Add <input type="button" value=""/> < Remove	Email Field: Email

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

Additional Emails

From Email Address Current User's email address

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

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.**

Edit Create Records

Create Salesforce records using values from the flow.

**Label**: Save Response    **API Name**: Save\_Response

**Description**:

**How Many Records to Create**: One

**How to Set the Record Fields**: Use separate resources, and literal values

**Create a Record of This Object**: Survey Result

**Set Field Values for the Survey Result**

Field	Value
Comment__c	← A_a Comment X
Email__c	← A_a Email > Value X
Name__c	← (!Name.firstName) (!Name.lastName)
Rating__c	← A_a Rating X

Manually assign variables

#### 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**.

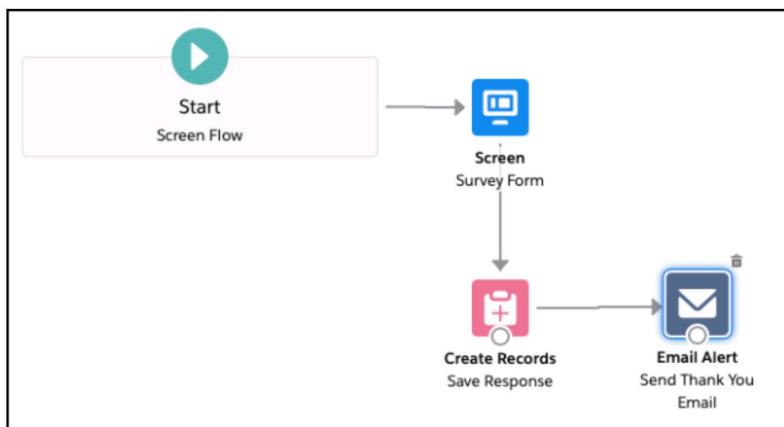
Edit "Survey - Thank You Email" email alert

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	
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

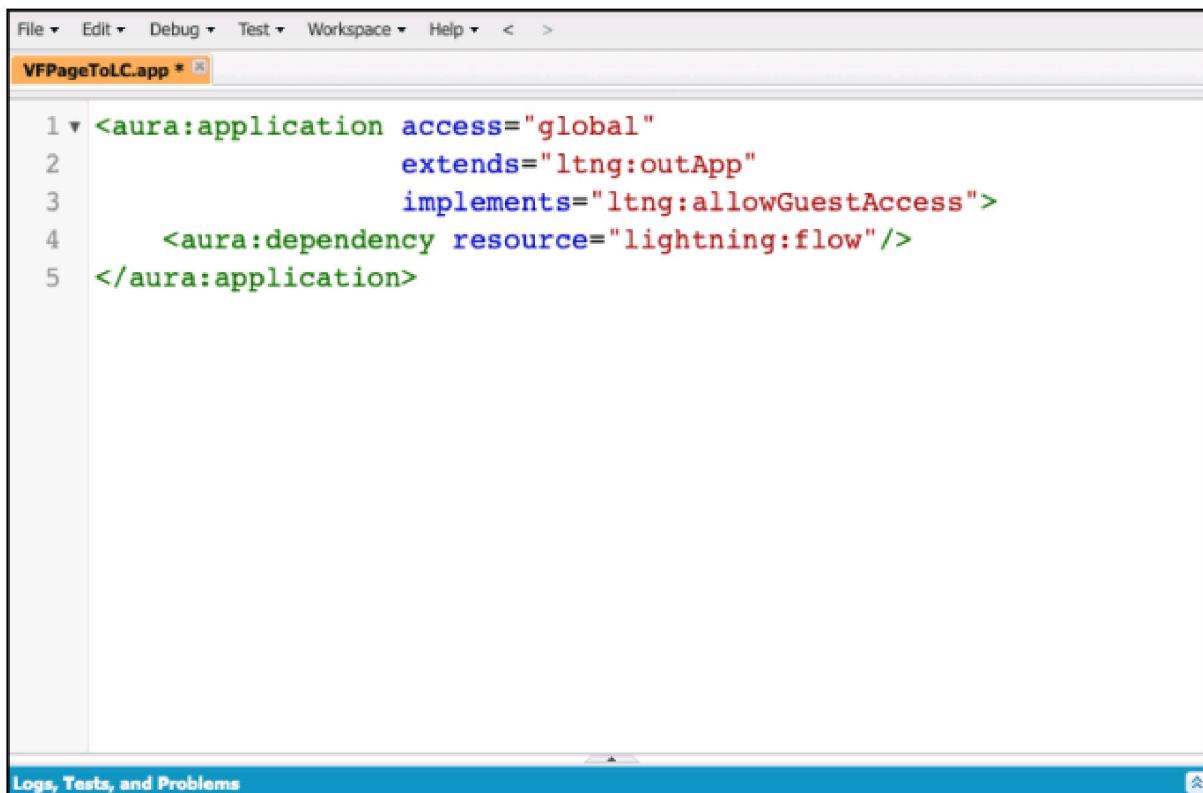
[Cancel](#)

[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 (VFPageToLC)** field, make sure to select the **Lightning Out Dependency App** checkbox.
4. Click **Submit**.
5. Copy code from [GitHub](#) and paste it into your Lightning Application.
6. **Save** your code.



The screenshot shows the Salesforce Developer Console interface. The top navigation bar includes File, Edit, Debug, Test, Workspace, Help, and tabs for < >. A tab labeled "VFPageToLC.app \*" is selected. 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, 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 interface. At the top, it says "Visualforce Page Survey". Below that is the "Page Edit" section with tabs for "Page Information" and "Visualforce Markup". In "Page Information", fields include "Label" (Survey), "Name" (Survey), and "Description". Under "Available for Lightning Experience, Experience Builder sites, and the mobile app", there is a checked checkbox. Under "Require CSRF protection on GET requests", there is an unchecked checkbox. The "Visualforce Markup" tab is selected, displaying the following JavaScript 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
11       var statusChange = function (event) {
12         if(event.getParam("status") === "FINISHED") {
13           var outputVariables = event.getParam("outputVariables");
14           var key;
15           for(key in outputVariables) {
16             if(outputVariables[key].name === "myOutput") {
17               ...
18             }
19           }
20         };
21         $Lightning.use("c:VFPageToLC", function() {
22           $Lightning.createComponent("lightning:flow",
23             "flowContainer",
24             function (component) {
25               component.startFlow("Survey");
26             }
27           );
28         });
29       };
30     </script>
</body>

```

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

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

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

The screenshot shows the "Site Edit" screen. It includes fields for "Site Label" (Survey), "Site Name" (Survey), "Site Description" (empty), "Site Contact" (Rakesh Gupta), "Default Record Owner" (Rakesh Gupta), "Default Web Address" (http://katihar-developer-edition.gus.force.com/ survey), "Active" (checked), "Active Site Home Page" (Survey), "Inactive Site Home Page" (InMaintenance), "Site Template" (SiteTemplate), "Site Robots.txt" (empty), "Site Favorite Icon" (empty), "Analytics Tracking Code" (empty), "URL Rewriter Class" (empty), "Enable Feeds" (unchecked), "Clickjack Protection Level" (Allow framing by the same origin only (Recommended)), "Require Secure Connections (HTTPS)" (checked), "Lightning Features for Guest Users" (checked), "Upgrade all requests to HTTPS" (checked), "Enable Content Sniffing Protection" (checked), "Enable Browser Cross Site Scripting Protection" (checked), "Referrer URL Protection" (checked), and "Guest Access to the Payments API" (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.

