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Assignment no 1

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

Solution:

### Step 1: Create Custom Objects

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

The screenshot shows the Salesforce Setup interface with the title 'New Custom Object'. The page is titled 'Custom Object Definition Edit' and includes tabs for 'Save', 'Save & New', and 'Cancel'. A message bar at the top indicates that permissions are disabled for all profiles by default and provides links to 'Tell me more!' and 'Don't show this message again'.

**Custom Object Information**

- Label:** college (Example: Account)
- Plural Label:** colleges (Example: Accounts)
- Starts with record sound:**

The object name is used when referencing the object via the API.

- Object Name:** college (Example: Account)
- Description:** (Empty text area)

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

**Content Name:**

**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

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

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

The screenshot shows the 'Object Manager' page in the Salesforce setup. A message at the top indicates that permissions for the object are disabled by default. The 'Custom Object Definition Edit' section is active, showing fields for 'Label' (set to 'department') and 'Plural Label' (set to 'departments'). The 'Object Name' field is also populated with 'department'. There are sections for 'Description', 'Context-Sensitive Help Setting' (set to open the standard help window), and 'Record Name' (set to 'Department Name'). Under 'Optional Features', 'Allow Bulk API Access' and 'Allow Streaming API Access' are checked. The 'Deployment Status' is set to 'Deployed'. The 'Search Status' is checked. At the bottom, there are 'Save', 'Save & New', and 'Cancel' buttons.

## 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.

Setup > OBJECT MANAGER  
CDepartment

Details	
Fields & Relationships	Description
Page Layouts	
Lightning Record Pages	API Name CDepartment__c
Buttons, Links, and Actions	Custom ✓ Singular Label CDepartment
Compact Layouts	Plural Label CDepartments
Field Sets	
Object Limits	
Record Types	
Related Lookup Filters	
Restriction Rules	
Scoping Rules	
Triggers	
Flow Triggers	
Validation Rules	
	Enable Reports Track Activities Track Field History Deployment Status Deployed Help Settings Standard salesforce.com Help Window

Setup > OBJECT MANAGER  
CDepartment

### New Relationship

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

Step 3 of 6

Field Label	college
Field Name	college
Description	
Help Text	
Child Relationship Name	CDepartments
Sharing Setting	Select the minimum access level required on the Master record to create, edit, or delete related Detail records. <input checked="" type="radio"/> Read Only: Allows users with at least Read access to the Master record to create, edit, or delete related Detail records. <input type="radio"/> ReadWrite: Allows users with at least ReadWrite access to the Master record to create, edit, or delete related Detail records.
Allow reparenting	<input type="checkbox"/> Child records can be reparented to other parent records after they are created
Auto add to custom report type	<input checked="" type="checkbox"/> Add this field to existing custom report types that contain this entity

Lookup Filter

The screenshot shows the Salesforce Setup interface for creating a new relationship. The left sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The main area is titled "New Relationship" under the "Department" object. Step 2, "Choose the related object", is selected. A dropdown menu shows "Related To" set to "college". Navigation buttons "Previous", "Next", and "Cancel" are at the bottom right.

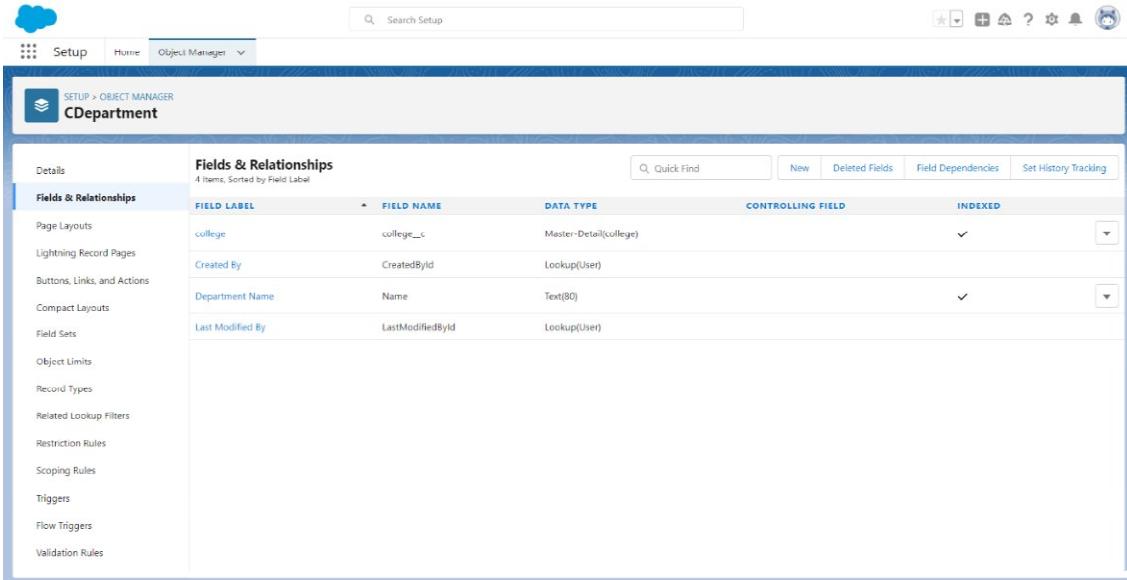
The screenshot shows the Salesforce Setup interface for creating a new custom field. The left sidebar lists various setup categories. The main area is titled "New Custom Field" under the "Department" object. Step 1, "Choose the field type", is selected. Under "Data Type", the "Roll Up Summary" option is selected. Other options shown include None Selected, Auto Number, Formula, and Lookup Relationship. Detailed descriptions for each type are provided. Navigation buttons "Next" and "Cancel" are at the bottom right.

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

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

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

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



The screenshot shows the Salesforce Object Manager interface for the 'CDepartment' object. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main area displays the 'Fields & Relationships' section with a table titled '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)		

The left sidebar lists various configuration options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, Scoping Rules, Triggers, Flow Triggers, and Validation Rules.

**Setup** Home Object Manager

**Tabs**

Custom Tabs

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

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

**Custom Object Tabs**

Action	Label	Tab Style	Description
Edit   Del	Books	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 of 5

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

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

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 6

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"/>	✓
Partner - Ann Subscription User	<input checked="" type="checkbox"/>	✓

Help for this Page

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: CDDepartments

Select Roll-Up Type

COUNT  
 SUM  
 MIN  
 MAX

Field to Aggregate: None

Filter Criteria

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

Previous Next Cancel

**Step 2. Enter the details**

**Step 2 of 5**

Field Label: Total count

Field Name: Total\_count

Description:

Help Text:

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

Previous Next Cancel

**Step 1. Choose the field type**

**Step 1**

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

**Data Type**

None Selected Select one of the data types below.

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

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

Roll Up Summary A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

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

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

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- Users can edit the master record even if all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

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

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

Next Cancel

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'college'. On the left, a sidebar lists various configuration options like Page Layouts, Lightning Record Pages, Buttons, etc. The central area is titled 'Fields & Relationships' with a sub-section '4 Items, Sorted by Field Label'. It displays four fields in a table:

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

## Step 4: Create a Lightning App

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

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

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

The screenshot shows the Salesforce Setup interface with the 'Tabs' page open. The left sidebar includes 'Setup', 'Home', and 'Object Manager'. Under 'User Interface', 'Tabs' is selected. A search bar at the top says 'Search Setup'. The main area is titled 'New Custom Object Tab' and 'Step 2: Add to Profiles'. It instructs to choose user profiles for the new custom tab. A radio button is selected for 'Apply one tab visibility to all profiles [Default On]'. Below this is a table with two columns: 'Profile' and 'Tab Visibility'. The 'Profile' column lists numerous user types, and the 'Tab Visibility' column contains dropdown menus, all of which are currently set to 'Default On'.

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

Buttons at the bottom right include 'Previous', 'Next', and 'Cancel'.

Setup Home Object Manager

User Interface

Rename Tabs and Labels

**Tabs**

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

## SETUP Tabs

### 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

User Interface

Rename Tabs and Labels

**Tabs**

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

## SETUP Tabs

### Step 3. Add to Custom Apps Step 3 of 3

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

Custom App	Included Tab
Platform (standard_Platform)	<input checked="" type="checkbox"/>
Sales (standard_Sales)	<input checked="" type="checkbox"/>
Service (standard_Service)	<input checked="" type="checkbox"/>
Marketing (standard_Marketing)	<input checked="" type="checkbox"/>
Sample Console (standard_ServiceConsole)	<input checked="" type="checkbox"/>
High Volume Customer Portal User	<input checked="" type="checkbox"/>
Authenticated Website User	<input checked="" type="checkbox"/>
App Launcher (standard_AppLauncher)	<input checked="" type="checkbox"/>
Community (standard_Community)	<input checked="" type="checkbox"/>
Site.com (standard_Sites)	<input checked="" type="checkbox"/>
Salesforce Chatter (standard_Chatter)	<input checked="" type="checkbox"/>
Content (standard_Content)	<input checked="" type="checkbox"/>
Analytics Studio (standard_Insights)	<input checked="" type="checkbox"/>
Sales Console (standard_LightningSalesConsole)	<input checked="" type="checkbox"/>
Service Console (standard_LightningService)	<input checked="" type="checkbox"/>
Sales (standard_LightningSales)	<input checked="" type="checkbox"/>
Lightning Usage App (standard_LightningInstrumentation)	<input checked="" type="checkbox"/>
Digital Experiences (standard_SalesforceCMS)	<input checked="" type="checkbox"/>
Queue Management (standard_QueueManagement)	<input checked="" type="checkbox"/>
Data Manager (standard_DataManager)	<input checked="" type="checkbox"/>
Bolt Solutions (standard_LightningBolt)	<input checked="" type="checkbox"/>
Salesforce Scheduler Setup (standard_LightningScheduler)	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Append tab to users' existing personal customizations	

Previous Save Cancel

**New Custom Object Tab**

**Step 1. Enter the Details**

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

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

Object	Department
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: [Empty Text Area]

**Step 1 of 3**

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

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

The screenshot shows the Salesforce Setup interface with the 'Custom Tabs' page selected. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar at the top right says 'Search Setup'. The main content area has a title 'Custom Tabs' with a help link 'Help for this Page'. Below the title is a note: 'You can create new custom tabs to extend Salesforce functionality or to build new application functionality. Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.' There are four sections: 'Custom Object Tabs' (listing Book1, CDepartments, Courses, Research Proposal, Student), 'Web Tabs' (listing none), 'Visualforce Tabs' (listing none), and 'Lightning Component Tabs' (listing none). Each section has 'New' and 'What Is This?' buttons.

## 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.**

The screenshot shows a software interface for managing college information. At the top, there is a search bar labeled "Search..." and a toolbar with various icons. Below the toolbar, the main header reads "MECW". Underneath the header, there is a navigation bar with links: "My college", "colleges", "Departments", "student", and "Content".

The central part of the interface is a "Details" card for the college "mecw". The card contains the following fields:

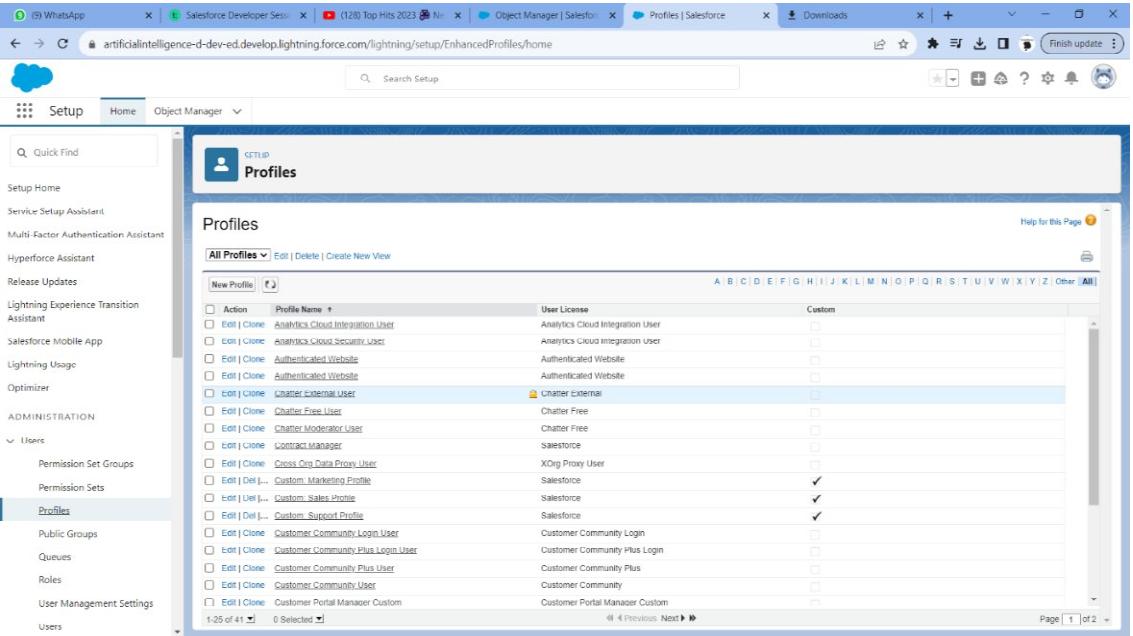
- Related**: College Name: mecw, Total count: 2.
- Details**: Owner: krishna s.
- Contact Information**: phone: 9087116402, Email: kiot@gmail.com, Location: 90, 80.
- Activity Log**: Created By: krishna s., 01/10/2023, 11:16 am; Last Modified By: krishna s., 01/10/2023, 11:19 am.

At the bottom left of the card, there is a link to "History".

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

Solution:

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



The screenshot shows the Salesforce Setup interface with the 'Profiles' page open. The left sidebar is collapsed, and the main area displays a table of profiles. The table has columns for Action, Profile Name, User License, and Custom. The 'Profile Name' column lists various standard and custom profiles, including 'Analytics Cloud Integration User', 'Analytics Cloud Security User', 'Authenticated Website', 'Chatter External', 'Chatter Free', 'Chatter Moderator User', 'Contract Manager', 'Cross Org Data Proxy User', 'Custom Marketing Profile', 'Custom Sales Profile', 'Custom Support Profile', 'Customer Community Login', 'Customer Community Plus Login', 'Customer Community Plus User', and 'Customer Portal Manager Custom'. The 'User License' column shows the corresponding license for each profile. The 'Custom' column contains checkmarks for profiles like 'Custom Marketing Profile', 'Custom Sales Profile', 'Custom Support Profile', 'Customer Community Login', 'Customer Community Plus Login', and 'Customer Portal Manager Custom'. The bottom of the table shows page navigation with '1-25 of 41' and '0 Selected'.

The image displays two screenshots of the Salesforce Setup interface, one above the other.

**Top Screenshot:** The user is viewing the "Profiles" page under the "Setup" tab. The left sidebar shows navigation options like Quick Find, Setup Home, Service Setup Assistant, etc., with "Profiles" selected. The main content area shows a table of profiles with columns for Action, Profile Name, User License, and Custom. One row is highlighted for "Salesforce API Only System Integrations". A navigation bar at the bottom indicates 1 of 7 pages.

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

**Bottom Screenshot:** The user is in the "Clone Profile" dialog. The title is "Clone Profile" and it says "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" (with a red box around the input field). At the bottom are "Save" and "Cancel" buttons.

Screenshot of the Salesforce Setup interface showing the 'Clone Profile' screen.

**Clone Profile**

Enter the name of the new profile.

You must select an existing profile to clone from.

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

Save Cancel

**Help for this Page**

Screenshot of the Salesforce Setup interface showing the 'Manager' profile details.

**Profile Manager**

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

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

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

**Profile Detail**

Name	Manager
User License	Salesforce Platform
Description	
Created By	SGPAL_S_01/10/2023, 7:09 pm
Modified By	SGPAL_S_01/10/2023, 7:09 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 Layout [View Assignment]
Asset	Appointment Invitation Layout [View Assignment]	Payment Authorization Adjustment Layout [View Assignment]
	Asset Layout [View Assignment]	Payment Gateway Layout [View Assignment]

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

## Manager

Set the permissions and page layouts for this profile.

**Profile Edit**

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

**Custom App Settings**

Visible	Default	Visible	Default		
Analytics Studio (standard_Insights)	<input type="checkbox"/>	<input checked="" type="radio"/>	Platform (standard_Platform)	<input type="checkbox"/>	<input checked="" type="radio"/>
App Launcher (standard_AppLauncher)	<input type="checkbox"/>	<input checked="" type="radio"/>	WDC (standard_Work)	<input type="checkbox"/>	<input checked="" type="radio"/>
Not (Not)		<input checked="" type="checkbox"/>	<input type="radio"/>		

**Service Provider Access**

Tab Settings

Overwrite users' personal tab customizations

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

**Communication Subscription Channel Types**

Individuals	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Locations	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Party Consents	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Push Topics	<input checked="" type="checkbox"/>				
Contact Point Addresses	<input type="checkbox"/>				
Contacts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contact Point Consents	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contact Point Emails	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Streaming Channels	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
User External Credentials	<input type="checkbox"/>				

**Custom Object Permissions**

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

**Session Settings**

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

**Password Policies**

User passwords expire in: 90 days

Enforce password history: 3 passwords remembered

Minimum password length: 8

Salesforce Developer Session | Object Manager | Profiles | Salesforce

artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j000000WQBz%2Fe%3FretURL%3D%25F00e5j0... | Finish update

## SETUP Profiles

Custom Object Permissions

	Bank	customers	Sellers	Streaming Channels	User External Credentials	
Contact Point Addresses	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Contact Point Consents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Contact Point Emails	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Basic Access	Read	Create	Edit	Delete	View All	Modify All
Enhancement Requests	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

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

Custom Object Permissions

	Bank	customers	Sellers	Streaming Channels	User External Credentials	
Contact Point Addresses	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Contact Point Consents	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Contact Point Emails	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Basic Access	Read	Create	Edit	Delete	View All	Modify All
Enhancement Requests	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

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

**Profile Configuration (Setup -> Profiles)**

**Session Settings**

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

**Password Policies**

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

**Users Management (Setup -> Users)**

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit   Login	Adanna Divya	gadmin	test_divya_pas_4w0yq9wtk_tz3grgzbpxox_3qy0t7xvymh4z3bkzw6mea@gmail.com		<input checked="" type="checkbox"/>	UAMS User
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty_004f500000bc43keab.lof@empire-kite-salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit   Login	Ellington Amelia	alli	amelia.ellington.1-46kxr9sooh.d5cycodtu4vh.hmbdwvwvwhn0.wuctor1daly@gmail.com		<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/> Edit	S.GOPAL	GS	kotz20@gmail.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	User Integration	integr	integration@0004f50000bcxkiap.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightssecurity@0004f50000bcxkxal.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

Screenshot of the Salesforce Setup interface showing the 'New User' page.

The left sidebar shows the navigation menu:

- Hyperforce Assistant
- Release Updates
- Lightning Experience Transition Assistant
- Salesforce Mobile App
- Lightning Usage
- Optimizer
- ADMINISTRATION**
- Users
  - Permission Set Groups
  - Permission Sets
  - Profiles
  - Public Groups
  - Queues
  - Roles
- User Management Settings
  - Users
  - Data
  - Email
- PLATFORM TOOLS
  - Apps
- Feature Catalogue

The main content area displays the 'New User' form under the 'User Edit' tab. The 'General Information' section contains the following fields:

Field	Value
First Name	SOWMIYA
Last Name	bala
Alias	sbole
Email	2k20csa179@kiot.ac.in
Username	2k21@kiot.ac.in
Nickname	User169616771282564526
Title	worker
Company	kiot bank
Department	
Division	

On the right side, there are additional configuration options:

- Role: <None Specified>
- User License: Salesforce Integration
- Profile: Salesforce API Only System Integrations
- Active:
- Marketing User:
- Offline User:
- Knowledge User:
- Flow User:
- Service Cloud User:
- Site.com Contributor User:
- Site.com Publisher User:
- WDC User:
- Data.com User Type: -None-
- Data.com Monthly Addition Limit: Default Limit (300)
- Accessibility Mode (Classic Only):
- High-Contrast Palette on Charts:
- Load Lightning Pages While Scrolling:
- Debug Mode:

The screenshot shows the Salesforce Setup interface. On the left, the navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main content area is titled 'User' and shows details for a user named 'sowmiya bala'. The 'User Detail' section contains fields such as Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, Language, Delegated Approver, Receive Approval Request Emails, Federation ID, App Registration: One-Time Password, and App Registration: Salesforce Authenticator. The 'Role' section lists 'Salesforce Platform' and 'Manager' as active roles. Other sections include 'Sharing', 'Reset Password', 'Login', 'Freeze', 'User License Profile', 'Active', 'Marketing User', 'Knowledge User', 'Flow User', 'Service Cloud User', 'Site.com Contributor User', 'Site.com Publisher User', 'WDC User', 'Mobile Push Registrations', 'Data.com User Type', 'Accessibility Mode (Classic Only)', 'Debug Mode', 'High-Contrast Palette on Charts', 'Load Lightning Pages While Scrolling', and 'Salesforce CRM Content User'. A 'User ProfileHelp for this Page' link is also present.

The screenshot shows a Gmail inbox with 5,318 messages. The inbox list includes 'Inbox', 'Starred', 'Snoozed', 'Sent', 'Drafts', and 'More'. A message from 'support@salesforce.com' is selected, with the subject 'Welcome to Salesforce!'. The message body contains a 'Welcome to Salesforce!' logo, a 'Verify Account' button, and a URL: <https://artificialintelligence-d-dev-ed-develop.my.salesforce.com>. It also includes a note about saving the URL for later log-in and a 'Again, welcome to Salesforce!' message at the bottom. The top of the screen shows the Salesforce developer session in the browser tab.

Salesforce | Change Your Password

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

- 8 characters
- 1 letter
- 1 number

\* New Password  
..... Good

\* Confirm New Password  
..... Match

Security Question  
▼ In what city were you born?

\* Answer  
salem

Change Password

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

Login | Salesforce

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

WATCH ON DEMAND

AIDay

© 2023 Salesforce, Inc. All rights reserved.

Recently Viewed | Bank | Salesf... x +

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

MECW

mecw - Bank customers Home

Bank 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.

Incognito (Finish update)

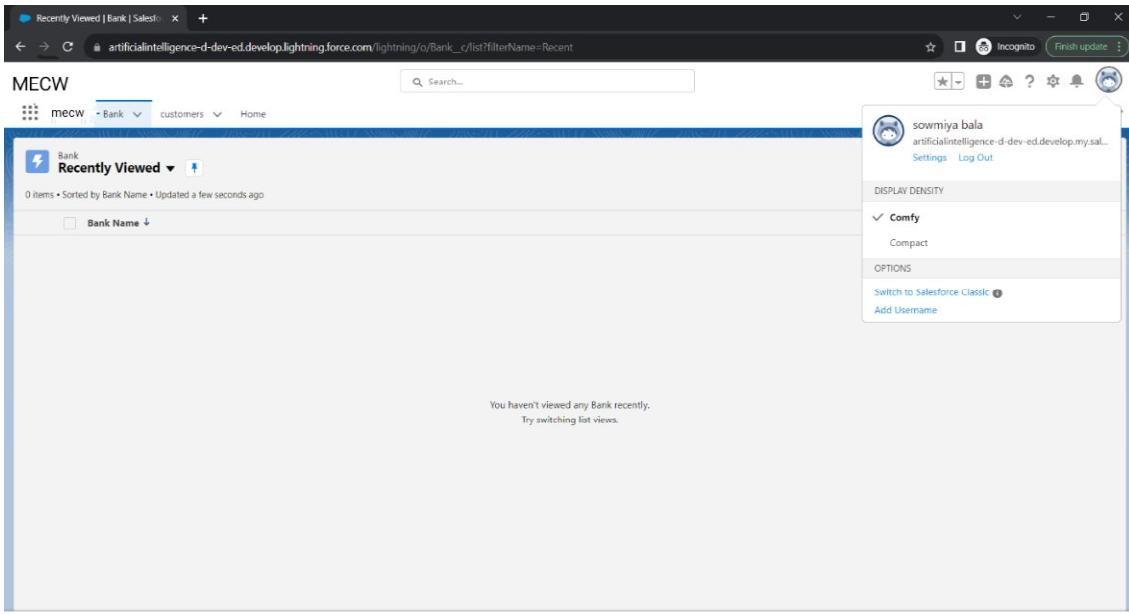
sowmiya bala  
artificialintelligence-d-dev-ed.develop.my.sal...  
Settings Log Out

DISPLAY DENSITY

✓ Comfy  
Compact

OPTIONS

Switch to Salesforce Classic Add Username



New Bank | Salesforce x +

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/o/Bank\_\_c/new?count=1&nooverride=1&useRecordTypeCheck=1&navigation.location=LIST\_VIEW&uid=16..

Incognito (Finish update)

mecw - Bank customers Home

Bank Recently Viewed

0 items • Updated a few seconds ago

Bank Name

New Bank

Information

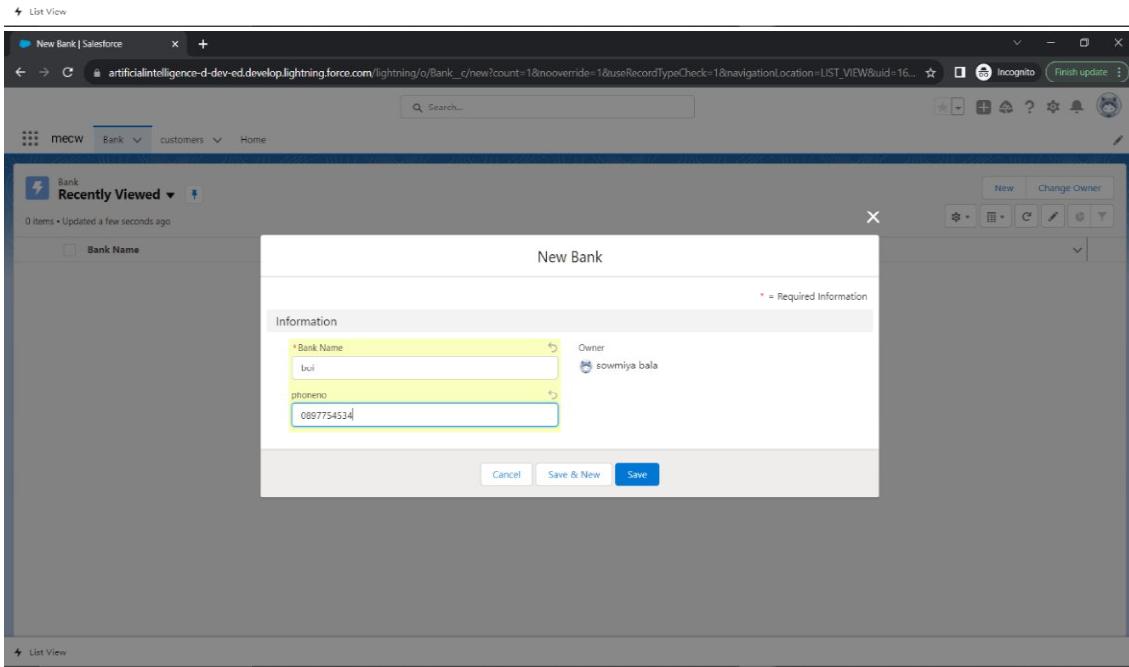
\* = Required Information

Bank Name: bui  
Owner: sowmiya bala

phoneno: 0897754534

New Change Owner

Cancel Save & New Save



New customer | Salesforce

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/o/customer\_\_c/new?count=2&incoverride=1&useRecordTypeCheck=1&navigationLocation=LIST\_VIEW&bu...

Incognito

Search...

customers

Recently Viewed

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

customer Name ↓

New customer

\* Required Information

Information

\* customer Name  
madhu

\* Bank  
boi

Cancel Save & New Save

List View

mechw | customer | Salesforce

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/r/customer\_\_c/a025j00000f0YFaAAM/view

Incognito

customer "madhu" was created.

Related Details

customer Name  
madhu

Bank  
boi

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

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

New Contact Edit Delete

List View

The image displays two screenshots of the Salesforce Setup interface, one above the other.

**Top Screenshot:** The user is viewing the "Profiles" page under the "Profiles" section of the Setup menu. The page lists various profiles with columns for Action, Profile Name, User License, and Custom. The "salesmanager" profile is selected, indicated by a checked checkbox in the Action column. Other profiles listed include "Salesforce API Only System Integrations", "Silver Partner User", "Solution Manager", "Standard Platform User", "Standard User", and "System Administrator".

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

**Bottom Screenshot:** The user is in the "Clone Profile" dialog box. The title bar says "Clone Profile". It instructs the user to "Enter the name of the new profile." Below this, a message states "You must select an existing profile to clone from." A dropdown menu shows "Existing Profile: Standard Platform User", "User License: Salesforce Platform", and a "Profile Name" input field containing "salesmanager". At the bottom are "Save" and "Cancel" buttons.

**Profile: salesmanage**

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

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

**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	Not Assigned [View Assignment]	Order [View Assignment]
Home Page Layout	Home Page Default [View Assignment]	Order Product [View Assignment]
Account	Account Layout [View Assignment]	Payment [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	Payment Authorization [View Assignment]
Appointment Invitation	Appointment Invitation Layout [View Assignment]	Payment Authorization Adjustment [View Assignment]
Asset	Asset Layout [View Assignment]	Payment Gateway [View Assignment]

**Profile Edit**

Set the permissions and page layouts for this profile.

Name	salesmanage	User License	Salesforce Platform	Custom Profile
Description				

**Custom App Settings**

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

**Service Provider Access**

**Tab Settings**

Overwrite users' personal tab customizations

**Standard Tab Settings**

Home	Default On	Learning	Default On

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

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j00000WQCE%2Fe%3FrerURL%3D%252FO...

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

SEARCH Setup Object Manager

SETUP Profiles

Contact Point Emails User External Credentials

Custom Object Permissions

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

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

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

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

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j00000WQCE%2Fe%3FrerURL%3D%252FO...

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

SEARCH Setup Object Manager

SETUP Profiles

Contact Point Emails User External Credentials

Custom Object Permissions

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

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

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

Save Save & New Cancel

Salesforce Developer Session 2 | Top Hits 2023 | New Page | Users | Salesforce | Welcome to Salesforce: Verify your... | Finish update

Setup Home Object Manager

Search Setup

Users

User Management Settings

Users

General Information

User Edit Save Save & New Cancel

First Name: [ ] Role: <None Specified>

Last Name: [ ] User License: Salesforce Integration

Alias: [ ] Profile: Salesforce API Only System Integrations

Email: [ ] Active:

Username: [ ] Marketing User:

Nickname: [ ] Offline User:

Title: [ ] Knowledge User:

Company: [ ] Flow User:

Department: [ ] Service Cloud User:

Division: [ ] Site.com Contributor User:

Data.com User Type:

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 | Top Hits 2023 | New Page | Users | Salesforce | Welcome to Salesforce: Verify your... | Finish update

Setup Home Object Manager

Search Setup

Users

User Management Settings

Users

General Information

User Edit Save Save & New Cancel

First Name: madhu Role: <None Specified>

Last Name: b User License: Salesforce Platform

Alias: mb Profile: Salesmanage

Email: 12k20csa179@kot.ac.in Active:

Username: 12k20csf@kot.ac.in Marketing User:

Nickname: User169616842426654192 Offline User:

Title: worker Knowledge User:

Company: kot bank Flow User:

Department: Sales Service Cloud User:

Division: Site.com Publisher User:

Data.com User Type:

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

Accessibility Mode (Classic Only):

High-Contrast Palette on Charts:

Load Lightning Pages While Scrolling:

Debug Mode:

The screenshot shows the Salesforce Setup interface with the 'Users' page open. The left sidebar navigation includes 'Setup', 'Home', and 'Object Manager'. Under 'User Management Settings', 'Users' is selected. The main content area displays the 'Users' setup page with sections for 'Mailing Address', 'Single Sign On Information', 'Locale Settings', and 'Approver Settings'. The 'Mailing Address' section contains fields for Street, City, Zip/Postal Code, State/Province, and Country. The 'Single Sign On Information' section has a 'Federation ID' field. The 'Locale Settings' section shows Time Zone (GMT+05:30 India Standard Time (Asia/Kolkata)), Locale (English (India)), and Language (English). The 'Approver Settings' section includes fields for Delegated Approver and Manager, and a checkbox for 'Receive Approval Request Emails'. At the bottom are 'Save', 'Save & New', and 'Cancel' buttons.

SEARCH SETUP

SETUP

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

The screenshot shows the Salesforce Setup interface for managing users. The left sidebar navigation includes 'Setup', 'Home', and 'Object Manager'. Under 'User Management Settings', 'Users' is selected. The main content area displays the 'User Detail' page for a user named 'madhu b'. The user's details include:

Name	Value
Name	madhu b
Alias	mb
Email	2k20csit179@kiot.ac.in [VERIFY]
Username	2k20csit@kiot.ac.in
Nickname	User16951684242865419206
Title	worker
Company	kiot bank
Department	Sales
Division	
Address	4191, angampalayam, uthamasolapuram ... Paraikkadu , salen- 636038 TAMIL NADU (GMT +05:30) India Standard Time (Asia/Kolkata)
Time Zone	English (India)
Locale	English (India)
Language	English
Delegated Approver	Manager
Receive Approval Request Email	Only if I am an approver
Federation ID	
App Registration: One-Time Password Authenticator	[REDACTED]

Role: SalesForce Platform  
User License Profile: salesmanager  
Active:   
Marketing User:   
Office User:   
Knowledge User:   
Flow User:   
Service Cloud User:   
Site.com Contributor User:   
Site.com Publisher User:   
WIC User:   
Mobile Push Registrations:   
Data.com User Type:   
Accessibility Mode (Classic Only):   
Debug Mode:   
High-Contrast Palette on Charts:   
Load Lightning Pages While Scrolling:

The right side of the screen shows a 'User ProfileHelp for this Page' button.

The screenshot shows a Gmail inbox with 5,318 messages. The inbox contains a welcome email from Salesforce with the subject 'Welcome to Salesforce!'. The email body includes:

Welcome to Salesforce!

Click below to verify your account.

[Verify Account](https://artificialintelligence-d-dev-ed.my.salesforce.com)

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

Username:  
[2k20csit@kiot.ac.in](#)

Again, welcome to Salesforce!

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

Change Your Password | Salesforce

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

**salesforce**

### Change Your Password

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

- 8 characters
- 1 letter
- 1 number

\* New Password  
..... Good

\* Confirm New Password  
..... Match

Security Question  
▼ In what city were you born?

\* Answer  
india

Change Password

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

---

Recently Viewed | Bank | Salesforce

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

MECW

mecw Bank customers Home

Search...

Bank Name

Recently Viewed

0 items • Updated a few seconds ago

New

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

List View

Recently Viewed | customers | [Recently](#)

[artificialintelligence-d-dev-ed.lightning.force.com/lightning/o/customer\\_\\_c/list?filterName=Recent](#)

MECW

mebw Bank customers Home

Search... Finish update

**Recently Viewed**

0 items • Updated a few seconds ago

customer Name

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

[List View](#)

[WhatsApp](#) [Salesforce Developer Session](#) [\(128\) Top Hits 2023](#) [Notes](#) [Permission Sets | Salesforce](#) [Welcome to Salesforce!](#) [Reset Password | Salesforce](#)

[artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/PermSets/home](#)

Setup Home Object Manager

Search Setup

**Permission Sets**

Help for this Page

[All Permission Sets](#) [Edit](#) [Delete](#) [Create New View](#)

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

1-25 of 29 [Selected](#) [Previous](#) [Next](#) Page 1 of 2

<http://artificialintelligence-d-dev-ed.lightning.force.com/lightning/app/setup/PermSets/home>

Step 2:

Permission Sets:

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

Object-Level Security:

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

Record-Level Security:

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

Ownership:

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

## Organization-Wide Defaults:

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

## Testing:

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

The screenshot shows the Salesforce Setup interface for managing Permission Sets. The left sidebar navigation includes links for Setup, Home, Object Manager, and various user-related sections like Users, User Management Settings, and User Interface. The main content area is titled 'Permission Sets' and displays a table of existing permission sets. The table columns are: Action, Permission Set Label, Description, and License. Some rows have a yellow warning icon next to them. The 'Description' column provides a brief overview of the permissions granted by each set. The 'License' column indicates which specific license or feature set is required for each permission set.

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

Salesforce Developer Session | artificialintelligence-d-dev-ed.lightning.force.com | (128) Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce: Version 44.0 | Reset Password | Salesforce | Finish update

Setup Home Object Manager

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Permission Set Groups

Permission Sets

Profiles

Public Groups

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Roles

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Data.com

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App Menu

SEARCH Setup

Permission Set 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 the permission set to multiple users with different user and permission set licenses.
- Choose a specific user license if you want users with only one license type to use this permission set.
- Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.

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

License:  --None--

Save Cancel

Help for this Page

Salesforce Developer Session | artificialintelligence-d-dev-ed.lightning.force.com | (128) Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce: Version 44.0 | Reset Password | Salesforce | Finish update

Setup Home Object Manager

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User Interface

Action Link Templates

Actions & Recommendations

App Menu

SEARCH Setup

Permission Set 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 the permission set to multiple users with different user and permission set licenses.
- Choose a specific user license if you want users with only one license type to use this permission set.
- Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.

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

License:  --None--

Save Cancel

Help for this Page

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

**Permission Set Overview:**

- API Name:** salesmanager
- Namespace Prefix:** salesmanager
- Created By:** SQPAL S. 01/10/2023, 7:29 pm
- Session Activation Required:**
- Last Modified By:** SQPAL S. 01/10/2023, 7:29 pm

**Apps:**

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

**Object Settings:**

Object Name	Object Permissions	Total Fields	Tab Settings
Accounts	No Access	40	—
All Insert Reasons	No Access	—	—
All Record Insights	No Access	—	—
Alternative Payment Methods	No Access	27	—
API Anomaly Event Stores	No Access	14	—
App Analytics Query Requests	No Access	—	—
Application Usage Assignments	No Access	—	—
Appointment Calendars	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	19	—
Asset Relationships	—	10	—
Assets	No Access	42	—
Asset State Periods	No Access	11	—

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

The left sidebar shows the navigation menu under 'Users' with 'Permission Sets' selected.

The main content area displays the 'Permission Set' details for 'salesmanager'. The 'Tab Settings' section shows 'Bank' as the active tab. The 'Object Permissions' section lists permissions for the 'Bank' object:

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

The 'Field Permissions' section lists permissions for fields in the 'Bank' object:

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

Screenshot of the Salesforce Setup interface showing the 'Permission Sets' page for the 'salesmanager' permission set after changes have been made.

The left sidebar shows the navigation menu under 'Users' with 'Permission Sets' selected.

The main content area displays the 'Permission Set' details for 'salesmanager'. The 'Tab Settings' section shows 'Bank' as the active tab. The 'Object Permissions' section lists permissions for the 'Bank' object:

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"/>

The 'Field Permissions' section lists permissions for fields in the 'Bank' object:

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

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

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

Setup Home Object Manager

User Management Settings

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Permission Set Groups

Permission Sets

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Public Groups

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salesmanager

Current Assignments

No assignments defined.



Add Assignment

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

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

Setup Home Object Manager

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Select Users to Assign

All Users

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

Cancel Next

Salesforce Developer Session | artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/PermSets/0P5j000008Phok/PermissionSetAssignment/new

Setup Home Object Manager Search Setup

Select an Expiration Option For Assigned Users

No expiration date (selected)  
Specify the expiration date  
1 Day 1 Week 30 Days 60 Days Custom Date Time Zone Select a time zone...

Selected Users

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

Cancel Back Assign

PERMISSION SET 'SALESMANAGER' 1 assignments were successful.

Assignment Summary

Full Name	User License	Expires On	Time Zone	Status
madhu b	Salesforce Platform			Success

Done

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

Setup Home Object Manager Search Setup

Recently Viewed | customers | [+ New](#)

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

MECW

mecw Bank customers Home

Search... [?](#) [Help](#) [Feedback](#) [Logout](#)

**Recently Viewed**

0 items • Updated a few seconds ago

customer Name

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

**LIST VIEW CONTROLS**

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

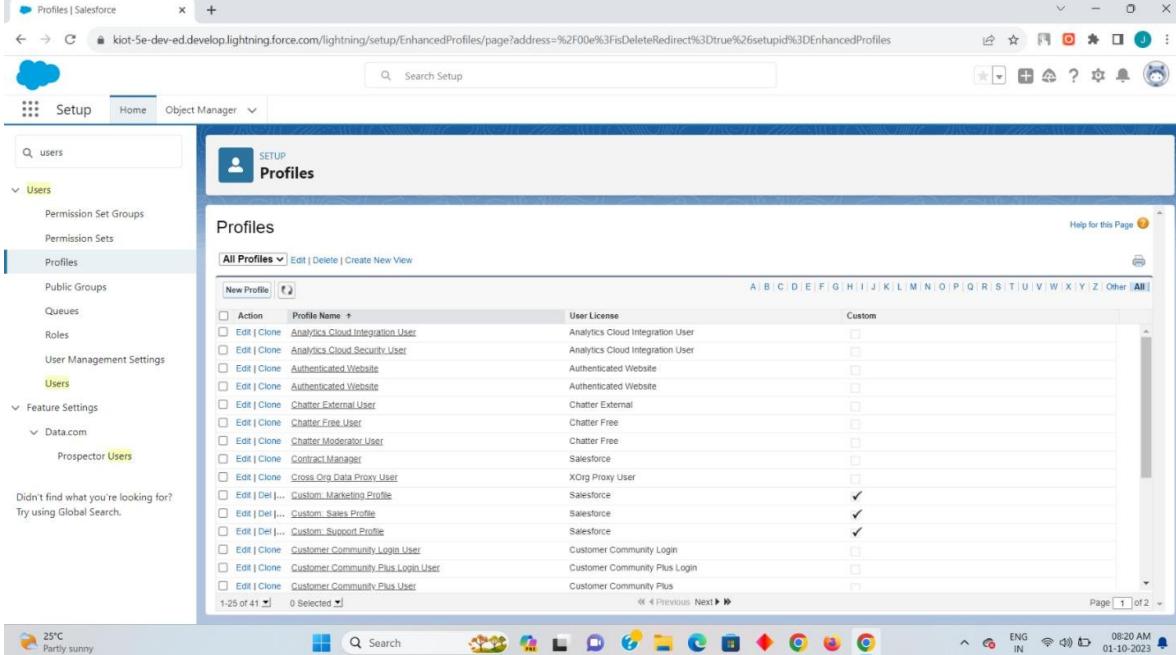
[javascript:void\(0\)](#)

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

Solution:

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

## Setup-quick search[profile]

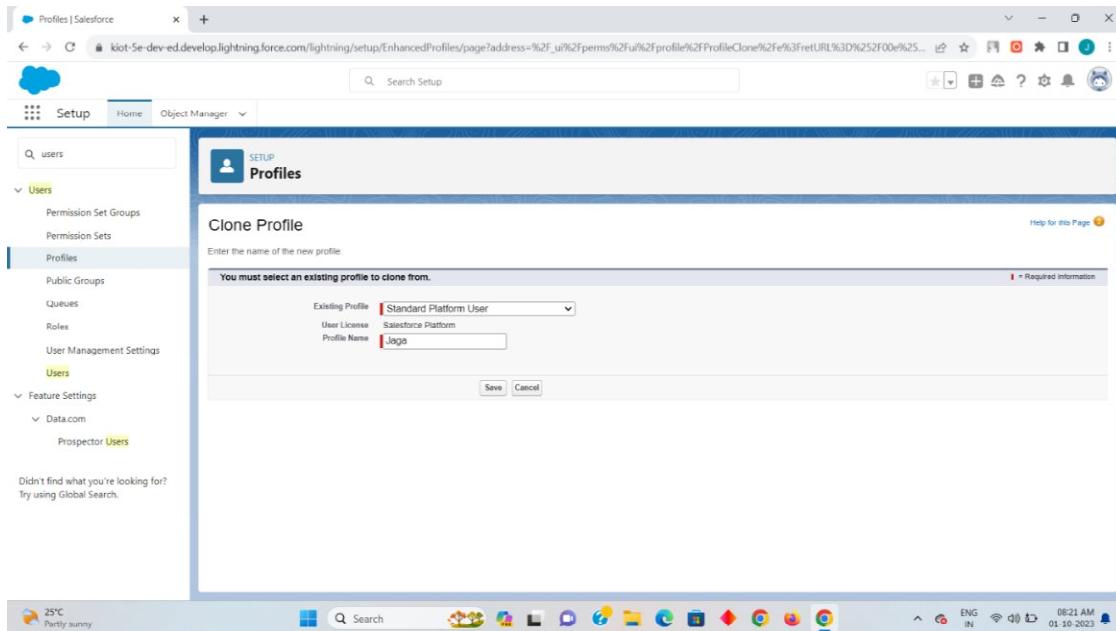


The screenshot shows the Salesforce Setup interface with the following details:

- Page Header:** Profiles | Salesforce
- Search Bar:** Search Setup
- Left Navigation:** Setup, Home, Object Manager
- Left Sidebar:** users, Permission Set Groups, Permission Sets, Profiles (selected), Public Groups, Queues, Roles, User Management Settings, Users, Feature Settings, Data.com, Prospector: Users.
- Message:** Didn't find what you're looking for? Try using Global Search.
- Current Page:** Profiles
- Table Headers:** All Profiles, Edit | Delete | Create New View, Action, Profile Name, User License, Custom.
- Table Data:** A list of profiles including Analytics Cloud Integration User, Analytics Cloud Security User, Authenticated Website, Authenticated External, Chatter External, Chatter Free, Chatter Moderator, Contact Manager, Cross Org Data Proxy User, Custom Marketing Profile, Custom Sales Profile, Custom Support Profile, Customer Community Login User, Customer Community Plus Login, Customer Community Plus User, etc.
- Page Footer:** Page 1 of 2, 08:20 AM, 01-10-2023, ENG IN.

## Step 2:

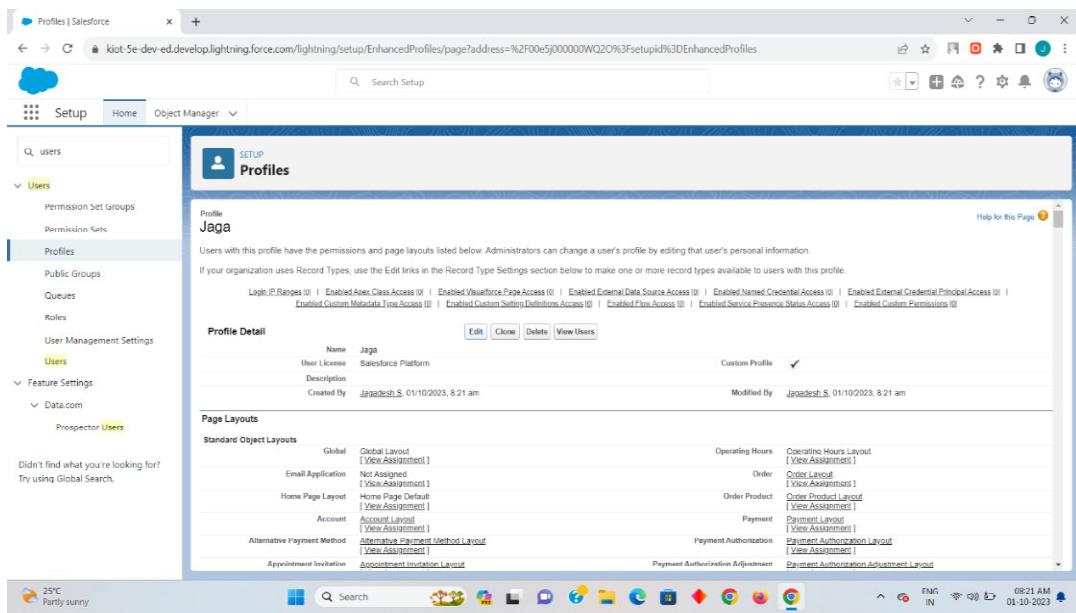
Click on the new to create a new profile along with the label and Api



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

## Step 3:

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



Profiles | Salesforce

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

Setup Home Object Manager

users

Users

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

Feature Settings

Data.com

Prospector Users

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

28°C Partly sunny

SETUP Profiles

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

Custom Object Permissions

	Basic Access	Create	Edit	Delete	View All	Modify All
Providers	<input type="checkbox"/>					
Resources	<input type="checkbox"/>					

Session Settings

Session Times Out After: 2 hours of inactivity

Enable different Experience Cloud login policies for employees:

- Separate Experience Cloud site and Salesforce login authentication for employees.
- Relax login IP restrictions
- Skip employee device activation during Experience Cloud site login

Session Security Level Required at Login: -None-

Search Setup

08:21 AM 01-10-2023 ENG IN

Basic Access Read Create Edit Delete View All Modify All

Basic Access Read Create Edit Delete View All Modify All

Profiles | Salesforce

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

Setup Home Object Manager

users

Users

- permission Set Groups
- permission Sets
- profiles**
- public Groups
- Queues
- Roles
- User Management Settings
- Users

Feature Settings

Data.com

Prospector Users

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

28°C Partly sunny

SETUP Profiles

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

Custom Object Permissions

	Basic Access	Create	Edit	Delete	View All	Modify All
Providers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Resources	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Session Settings

Session Times Out After: 2 hours of inactivity

Enable different Experience Cloud login policies for employees:

- Separate Experience Cloud site and Salesforce login authentication for employees.
- Relax login IP restrictions
- Skip employee device activation during Experience Cloud site login

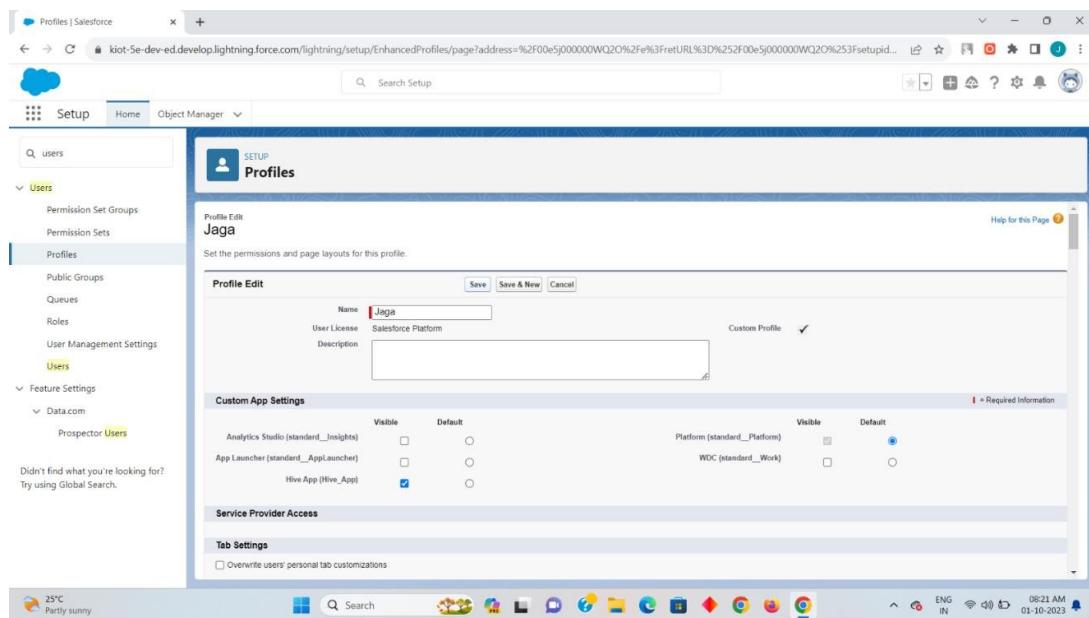
Session Security Level Required at Login: -None-

Search Setup

08:21 AM 01-10-2023 ENG IN

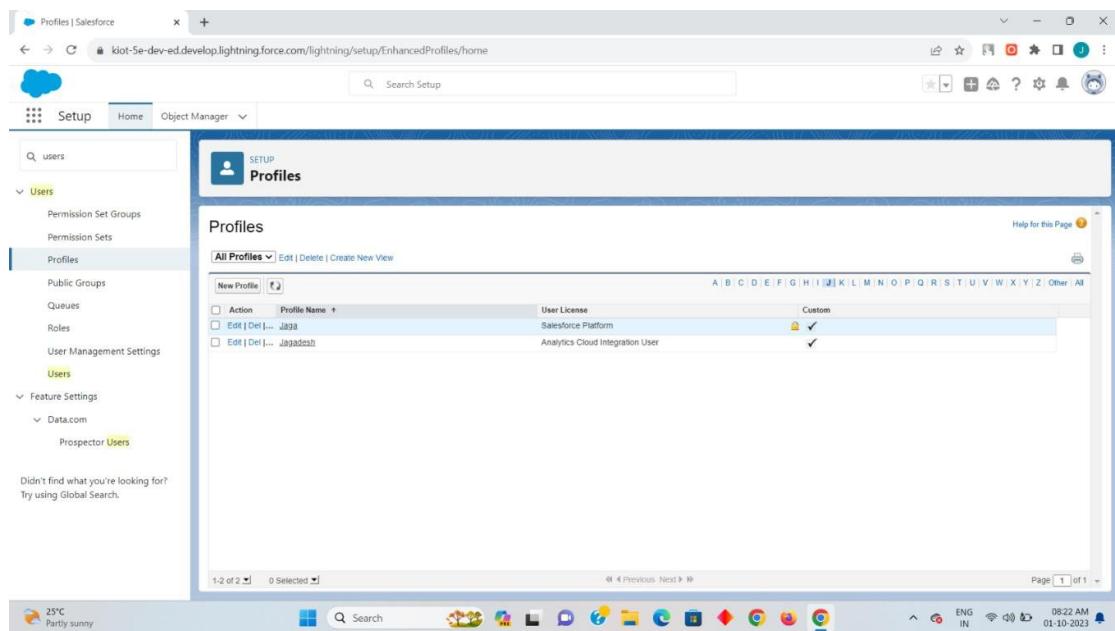
Basic Access Read Create Edit Delete View All Modify All

Basic Access Read Create Edit Delete View All Modify All



## 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



## Step 5:

Now create two users by enter into the Setup-quick search[user] and then click on new user after clicking that you need to create two user along

with the profile as Jaga which we have created on the step 2.once the one user has been created click on the save&new so that you can create the second user and there the user name can be created with alternate name but with the same user profile and once the two user are created click on save.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Chatter Expert	Chatter	chatty.00d500000c8iseaf.629blkrrkd4@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	Jane	jgray	jane_prahyagnamam.cz7d2koph3@gmail.com		<input checked="" type="checkbox"/>	Customer Community User
<input type="checkbox"/>	S.Jaga	JS	jaga098@gmail.com	CEO	<input type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	S.Jagadeesh	JS	xivo@gmail.com	System Admin	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	S.Jagadeesh	JS	jaga1117@gmail.com	Channel Sales Team	<input type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	User Integration	Integ	integration@004500000c8iseaf.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	User Security	sec	insightssecurity@00d500000c8iseaf.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

Users | Salesforce

kot-5e-dev-ed.lightning.force.com/lightning/setup/ManageUsers/page?address=%2f005%2fe%3fretURL%3D%252F005%253fisUserEntityOverride%253D1%252ferURL%...

Setup Home Object Manager

Users

New User

User Edit Save Save & New Cancel

General Information

First Name: Jagadeesh11  
Last Name: S  
Alias: JS  
Email: www123@gmail.com  
Username: www123@gmail.com  
Nickname: User109612875144902592  
Title:   
Company:   
Department:   
Division:

Role: Director\_Channel\_Sales  
User License: Salesforce Platform  
Profile:  -None-  
Active:  -None-  
Marketing User:  Jagad  
Office User:   
Knowledge User:   
Flow User:   
Service Cloud User:   
Site.com Contributor User:   
Mtn.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:

Help for this Page

25°C Party sunny

Search

08:23 AM 01-10-2023 ENG IN

Users | Salesforce

kot-5e-dev-ed.lightning.force.com/lightning/setup/ManageUsers/page?address=%2f005%2fe%3fretURL%3D%252F005%253fisUserEntityOverride%253D1%252ferURL%...

Setup Home Object Manager

Users

New User

User Edit Save Save & New Cancel

General Information

First Name: Jagadeesh22  
Last Name: S  
Alias: JS  
Email: jaa1@gmail.com  
Username: jaa1@gmail.com  
Nickname: User10961287993618745  
Title:   
Company:   
Department:   
Division:

Role: Marketing Team  
User License: Salesforce Platform  
Profile:  -None-  
Active:  -None-  
Marketing User:  Jagad  
Office User:   
Knowledge User:   
Flow User:   
Service Cloud User:   
Site.com Contributor User:   
Mtn.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:

Help for this Page

25°C Party sunny

Search

08:23 AM 01-10-2023 ENG IN

Users | Salesforce

kot-5e-dev-ed.lightning.force.com/lightning/setup/ManageUsers/page?address=%2f005%2fe%3fretURL%3D%252F005%253fisUserEntityOverride%253D1%252ferURL%...

Setup Home Object Manager

Users

All Users

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

In addition, download Salesforce1 to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices. [iOS](#) | [Android](#)

View: All Users  Create New View

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	S.Jagad	JS	www123@gmail.com	CEO	<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/> Edit	S.Jagadeesh	JS	wow@gmail.com	SF Admin	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	S.Jagadeesh	JS	jaa112@gmail.com	Channel Sales Team	<input checked="" type="checkbox"/>	Standard Platform User
<input checked="" type="checkbox"/> Edit	S.Jagadeesh11	JS	www123@gmail.com	Director_Channel_Sales	<input checked="" type="checkbox"/>	Jagad
<input checked="" type="checkbox"/> Edit	S.Jagadeesh22	JS	raat@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Jaata

New User Reset Password(s) Add Multiple Users

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

Help for this Page

25°C Party sunny

Search

08:24 AM 01-10-2023 ENG IN

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.

Permission Sets | Salesforce

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

Setup Home Object Manager

Users

Permission Set Groups

**Permission Sets**

Profiles

Public Groups

Queues

Roles

User Management Settings

**Users**

Feature Settings

Data.com

Prospector **Users**

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

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® mobile app from the App Store or Google Play® iOS | Android

All Permission Sets | Edit | Delete | Create New View

New

Action	Permission Set Label	Description	Licenses
<input type="checkbox"/>	Store	Allows access to the store. Lets users see products and categories, increases all buyer capabilities, and allows access to manage carts and orders.	B2B Buyer Permission Set One Seat
<input type="checkbox"/>	Buyer Manager	Denotes that the user is a Sales Cloud or Service Cloud user.	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/>	CRM User		CRM User
<input type="checkbox"/>	Commerce Admin	Allow access to commerce admin features.	Commerce Admin Permission Set License Seat
<input type="checkbox"/>	Contact Center Admin	Manage Service Cloud Voice contact centers that use Amazon Connect.	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Agent	Access agent features in Service Cloud Voice contact centers that use Amazon Connect.	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Supervisor	Access supervisor features in Service Cloud Voice contact centers that use Amazon Connect.	Service Cloud Voice User
<input type="checkbox"/>	Delhi One Experience Profile Manager		
<input type="checkbox"/>	Facility Manager	Lets users create, read, edit, and delete locations, sublocations, areas, and facilities.	Facility Manager
<input type="checkbox"/>	Field Service Standard PermSet	Give your mobile workforce access to the Field Service mobile app. Standard permission set.	Field Service Mobile
<input type="checkbox"/>	Merchandise	Allow access to commerce merchandising features.	Commerce Merchandise User Permission Set License Seat
<input type="checkbox"/>	Order Management Agent	Read Access to all entities enabled by Order Management.	Lightning Order Management User
<input type="checkbox"/>	Order Management Operations Manager	Access to all features enabled by Order Management.	Lightning Order Management User

1-25 of 30 0 Selected

Page 1 of 2

https://kiot-5e-dev-ed.develop.lightning.force.com/home/home.apexp?setup/PermSets/home

25°C Partly sunny

Permission Sets | Salesforce

kiot-5e-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2Fudd%2FPermissionSet%2FnewPermissionSet.apexp

Setup Home Object Manager

Users

Permission Set Groups

**Permission Sets**

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User Management Settings

**Users**

Feature Settings

Data.com

Prospector **Users**

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

Permission Set Create

Enter permission set information

Label **permission12**

API Name **permission12**

Description

Session Activation Required

Select the type of users who will use this permission set

Who will use this permission set?

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

Not sure what a permission set license is? Learn more here.

License **--None--**

Save Cancel

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Permission Sets | Salesforce

kiot-5e-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2FOPSS%000008Pgt%3fsfdcFrameOrigin%3Dhttps%253A%252F%252Fkiot-5e-dev-ed.devel...

Setup Home Object Manager

Users

Permission Set Groups

permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

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

25°C Partly sunny

Search Setup

SETUP Permission Sets

Permission Set permission12

Find Settings... Clone Delete Edit Properties Manage Assignments

Permission Set Overview

Description License Session Activation Required Last Modified By

API Name permission12 Namespace Prefix Created By Jagadeesh S. 01/10/2023, 8:24 am

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

ENG IN 08:24 AM 01-10-2023

Permission Sets | Salesforce

kiot-5e-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2FOPSS%000008Pgt%3fsfdcEntityPermissions

Setup Home Object Manager

Users

Permission Set Groups

permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

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

25°C Partly sunny

Search Setup

SETUP Permission Sets

Permission Set permission12

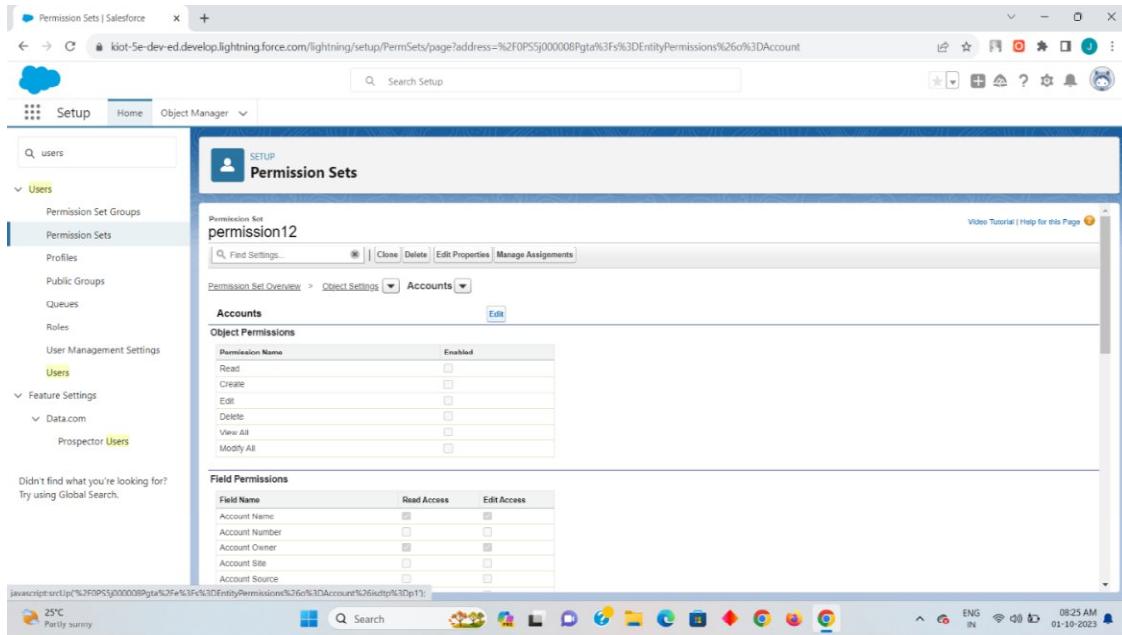
Find Settings... Clone Delete Edit Properties Manage Assignments

Permission Set Overview > Object Settings

Object Settings

Object Name	Object Permissions	Total Fields	Tab Settings
Account	No Access	9	--
Account Brands	No Access	44	--
AI Insight Reasons	No Access	--	--
AI Record Insights	No Access	--	--
Alternative Payment Methods	No Access	27	--
API Anomaly Event Stores	No Access	14	--
App Analytics Query Requests	No Access	--	--
Aplication 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	--

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## Step 7:

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

The screenshots show the Salesforce Setup interface for creating a Permission Set. The permission set is named 'permission12' and is assigned to the 'Accounts' object. In the 'Object Permissions' section, the 'Edit' permission is initially selected. After saving, the 'Delete' permission is also selected. The 'Field Permissions' section shows standard field access for Account Name, Number, Owner, Site, and Source.

## 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.

Permission Sets | Salesforce

Users

Current Assignments

No assignments defined.

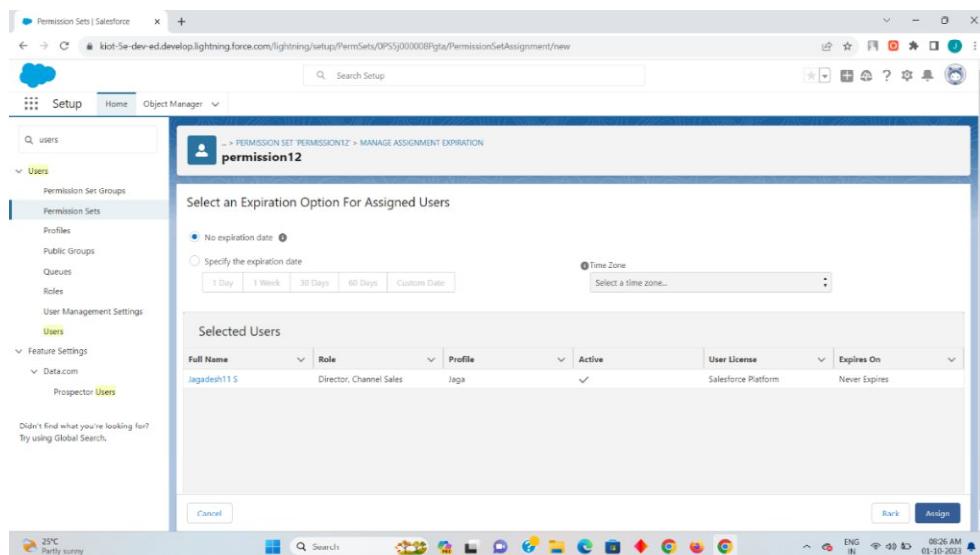
Select Users to Assign

Full Name	Alias	Username	Role	Active	Profile
Jagadeesh S	JS	w0w@gmail.com	SF Admin	<input checked="" type="checkbox"/>	System Administrator
Jagadeesh S	JS	jaga1117@gmail.com	Channel Sales Team	<input type="checkbox"/>	Standard Platform User
Jagadeesh11 S	Ji	jww123@gmail.com	Director, Channel Sales	<input checked="" type="checkbox"/>	Jaga
Jagadeesh22 S	Ji	jaat@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Jaga

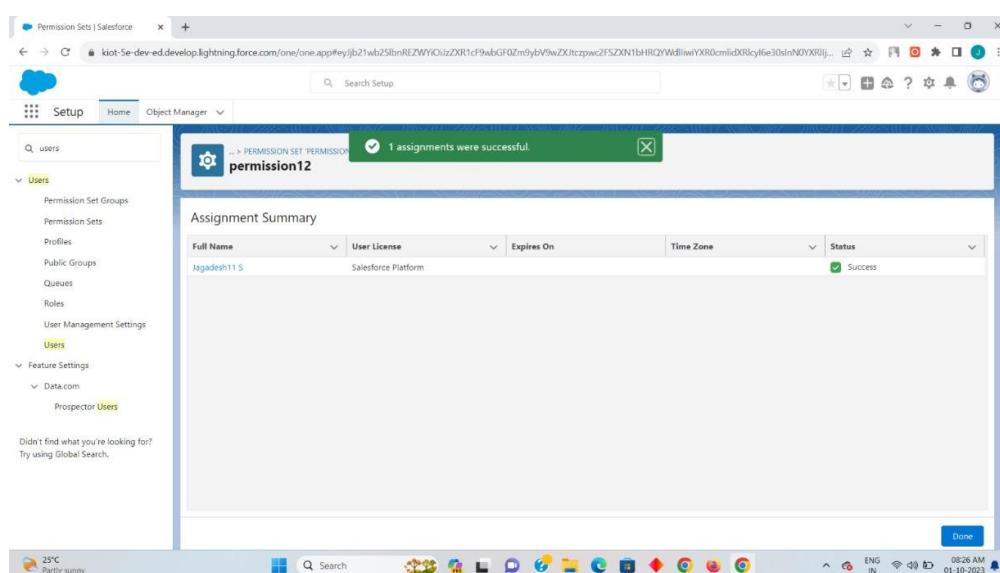
Select Users to Assign

Full Name	Alias	Username	Role	Active	Profile
Jagadeesh S	JS	w0w@gmail.com	SF Admin	<input checked="" type="checkbox"/>	System Administrator
Jagadeesh S	JS	jaga1117@gmail.com	Channel Sales Team	<input type="checkbox"/>	Standard Platform User
Jagadeesh11 S	Ji	jww123@gmail.com	Director, Channel Sales	<input checked="" type="checkbox"/>	Jaga
Jagadeesh22 S	Ji	jaat@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Jaga

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**.

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

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

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

The screenshot shows the 'Email Template' page in Salesforce. At the top, there's a header with a 'Thank You Email - Survey' title, 'Edit in Builder', 'Edit', and 'Clone' buttons. Below the header, there are two tabs: 'Details' (which is selected) and 'Related'. Under the 'Information' section, there are fields for 'Email Template Name' (set to 'Thank You Email - Survey'), 'Description' (empty), 'Related Entity Type' (set to 'Survey Result'), 'Folder' (set to 'Public Email Templates'), and a checkbox for 'Made in Email Template Builder' which is checked. In the 'Message Content' section, there are two tabs: 'Subject' (set to 'Thank You For Completing Our Survey!') and 'Enhanced Letterhead'. The 'HTML Value' tab contains the following content:

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

Under the 'Additional Information' section, it shows 'Created By' as 'Rakesh Gupta, 12/21/2020, 4:23 PM' and 'Last Modified By' as 'Rakesh Gupta, 12/21/2020, 4:32 PM'.

## Step 3: Create an Email Alert

- 1. Click Setup.**
- 2. In the Quick Find box, type Email Alerts.**
- 3. Select Email Alerts, click on the 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**

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:

Available Recipients	Selected Recipients
User: Integration User User: Rakesh Gupta User: Security User	Email Field: Email
Add <input type="button" value="&gt;"/>	<input type="button" value="&lt;"/> Remove

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

Additional Emails:

From Email Address: Current User's email address

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

Save Save & New Cancel

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

1. Click Setup.

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

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

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

- 2. Value: {!Comment}**
- 2. Click Add Row**
- 3. Row 2:**
  - 1. Field: Email\_c**
  - 2. Value: {!Email.value}**
- 4. Click Add Row**
- 5. Row 3:**
  - 1. Field: Name\_c**
  - 2. Value: {!Name.firstName}**
  - {!Name.lastName}**
- 6. Click Add Row**
- 7. Row 3:**
  - 1. Field: Rating\_c**
  - 2. Value: {!Rating}**
- 7. Click Done.**

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  
 Multiple

How to Set the Record Fields  
 Use all values from a record  
 Use separate resources, and literal values

Create a Record of This Object  
\* Object  
Survey Result

Set Field Values for the Survey Result

Field	Value
Comment__c	<input type="text"/> A_a Comment X
Email__c	<input type="text"/> A_a Email > Value X
Name__c	<input type="text"/> {!Name.firstName} {!Name.lastName}
Rating__c	<input type="text"/> A_a Rating X

[+ Add Field](#)

Manually assign variables

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

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

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

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

- 4. Clicks on the Survey – Thank You Email email alert.**
- 5. Click Done.**

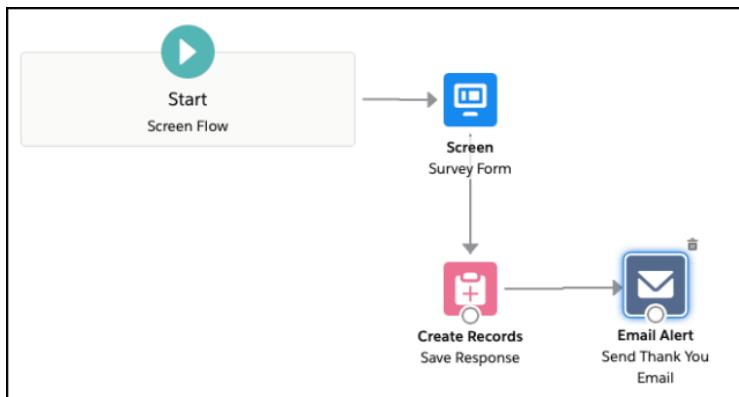
Edit "Survey - Thank You Email" email alert

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

* Label	* API Name
Send Thank You Email	Send_Thank_You_Email
Description	
Set Input Values	
A_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

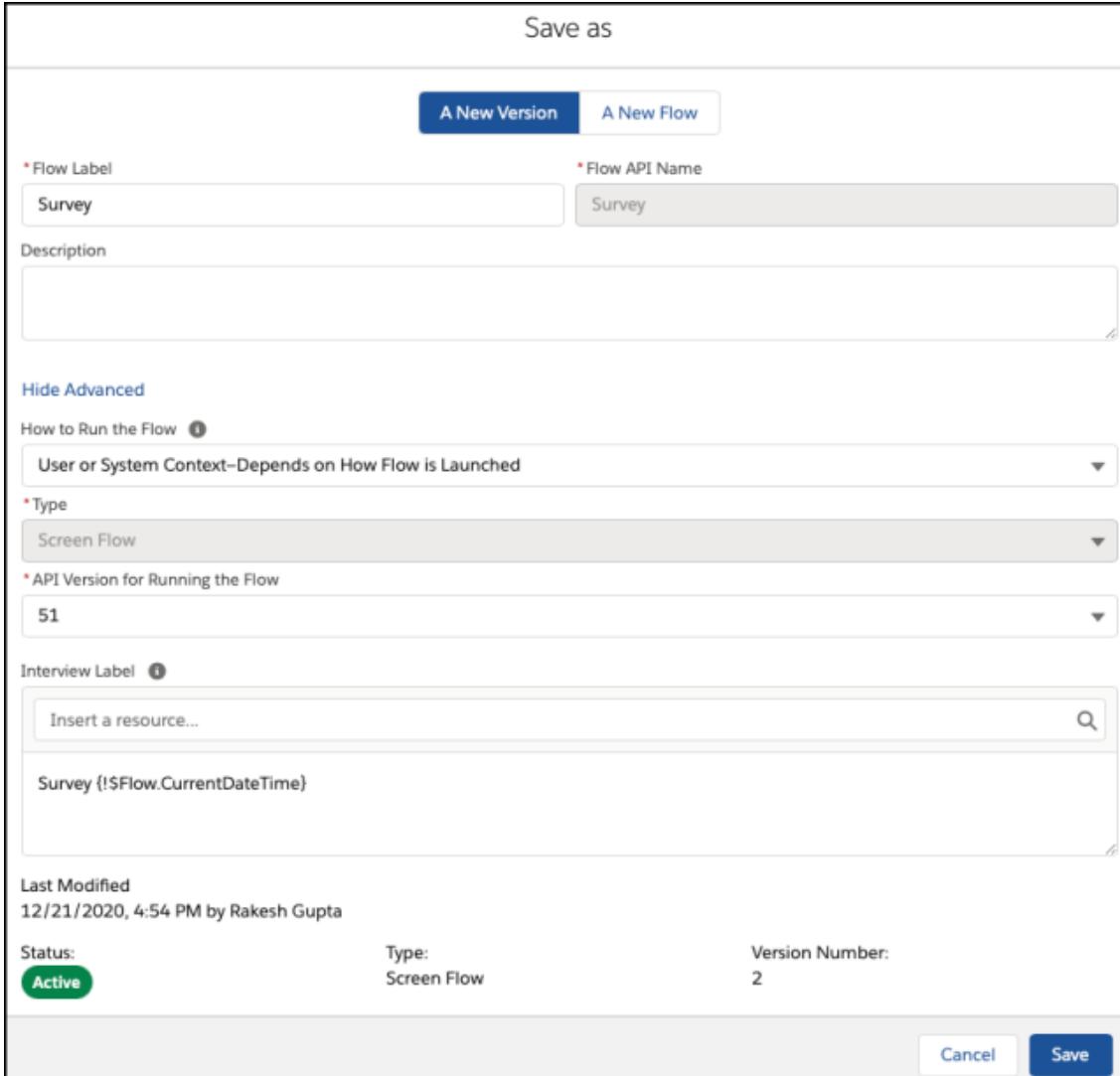
Interview Label ⓘ Insert a resource...

Survey {!\$Flow.CurrentDateTime}

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

Status: Active Type: Screen Flow Version Number: 2

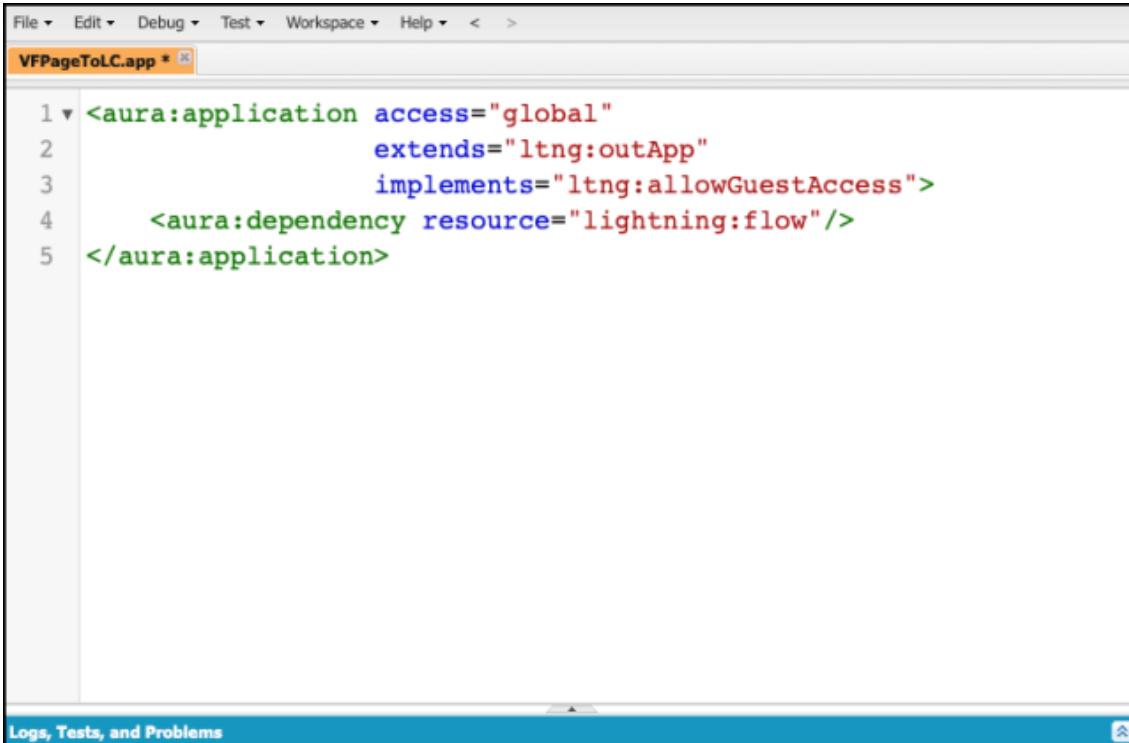
Cancel Save



## 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 IDE interface with the file 'VFPageToLC.app' open. The code editor contains the following XML:

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

The code editor has syntax highlighting for the XML tags. The status bar at the bottom indicates 'Logs, Tests, and Problems'.

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

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

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

component on the page  
using `$Lightning.createComponent()`

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

The screenshot shows the Visualforce Page Editor for a page named 'Survey'. The 'Page Information' section has 'Label' and 'Name' both set to 'Survey'. Under 'Available for Lightning Experience, Experience Builder sites, and the mobile app', the checkbox is checked. The 'Visualforce Markup' tab is selected, showing the following code:

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

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

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

1. Click **Setup**.

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

**Site Edit**

Save Cancel

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

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

## Proof of Concept

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

Survey

Name  
First Name  
Alok

Last Name  
Sinfal

\*Email  
[REDACTED]

\*Rating  
5

\*Comment  
Awesome Blog 

**Next**

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

Thank You For Completing Our Survey!  [Inbox](#) 

 Survey Site Guest User via b9amq6fe7r-b-cdzwmaa.gs0.bnc.salesforce.com to me 8:09 PM (1 minute ago)   

Hi Alok Sinfal,

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

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

Thanks,  
Automation Champion