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Salesforce Developer(Course)
Assignment no 1

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Year & Dep : 4th year & CSE
Batch : 2024
Zone no : Zone 8

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

Solution:

Step 1: Create Custom Objects

Assuming you have two custom objects, let's call them "College_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.

Setup Home Object Manager

New Custom Object

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more](#) [Go to object permissions page](#)

Save Save & New Cancel

Custom Object Information

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

Label Example: Account

Plural Label Example: Accounts

Starts with vowel sound ☐

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

Object Name Example: Account

Description

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

Content Name

Enter Record Name Label and Format

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

Record Name Example: Account Name

Data Type

Optional Features

☐ Allow Reports
☐ Allow Activities
☐ Track Field History
☐ Allow in Chatter Groups
☐ Enable LiveBinding

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 [What is this?](#)

Search Status

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

☐ Allow Search

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

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

Save Save & New Cancel

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

The screenshot shows the Salesforce Setup interface, specifically the Object Manager section. The page title is "New Custom Object". A warning banner at the top states: "Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more](#) [Go to where this message was posted](#)".

The main form is titled "Custom Object Definition Edit" and includes buttons for "Save", "Save & New", and "Cancel". It is divided into several sections:

- Custom Object Information:** This section contains fields for "Label" (with value "department" and example "Account"), "Plural Label" (with value "departments" and example "Accounts"), and "Object Name" (with value "department" and example "Account"). There is also a "Description" text area. Below these are checkboxes for "Context: Sensitive Help Setting" (selected) and "Content Name" (set to "None").
- Enter Record Name Label and Format:** This section includes a "Record Name" field (with value "Department Name" and example "Account Name") and a "Data Type" dropdown menu (set to "Text").
- Optional Features:** This section contains checkboxes for "Allow Reports", "Allow Activities", "Track Field History", "Allow in Chatter Groups", and "Enable LiveBinding".
- Object Classification:** This section includes checkboxes for "Allow Sharing", "Allow Bulk API Access", and "Allow Streaming API Access".
- Deployment Status:** This section includes checkboxes for "In Development" and "Deployed" (selected).
- Search Status:** This section includes a checkbox for "Allow Search".
- Object Creation Options (Available only when custom object is first created):** This section includes checkboxes for "Add Notes and Attachments related list to default page layout" and "Launch New Custom Tab Wizard after saving this custom object".


At the bottom of the form are buttons for "Save", "Save & New", and "Cancel".

Step 2: Create a Master-Detail Relationship

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

1. 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.



SetupHomeObject Manager

Search Setup

Setup > OBJECT MANAGER

CDepartment

Details

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

Details

Description

API Name
CDepartment__c

Custom

✓

Singular Label
CDepartment

Plural Label
CDepartments

Enable Reports

Track Activities


Track Field History

Deployment Status
Deployed

Help Settings

Standard salesforce.com Help Window

EditDelete



SetupHomeObject Manager

Search Setup

Setup > OBJECT MANAGER

CDepartment

Details

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

New Relationship

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

Field Labelcollege

Field Namecollege

Description

Help Text

Child Relationship NameCDepartments

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

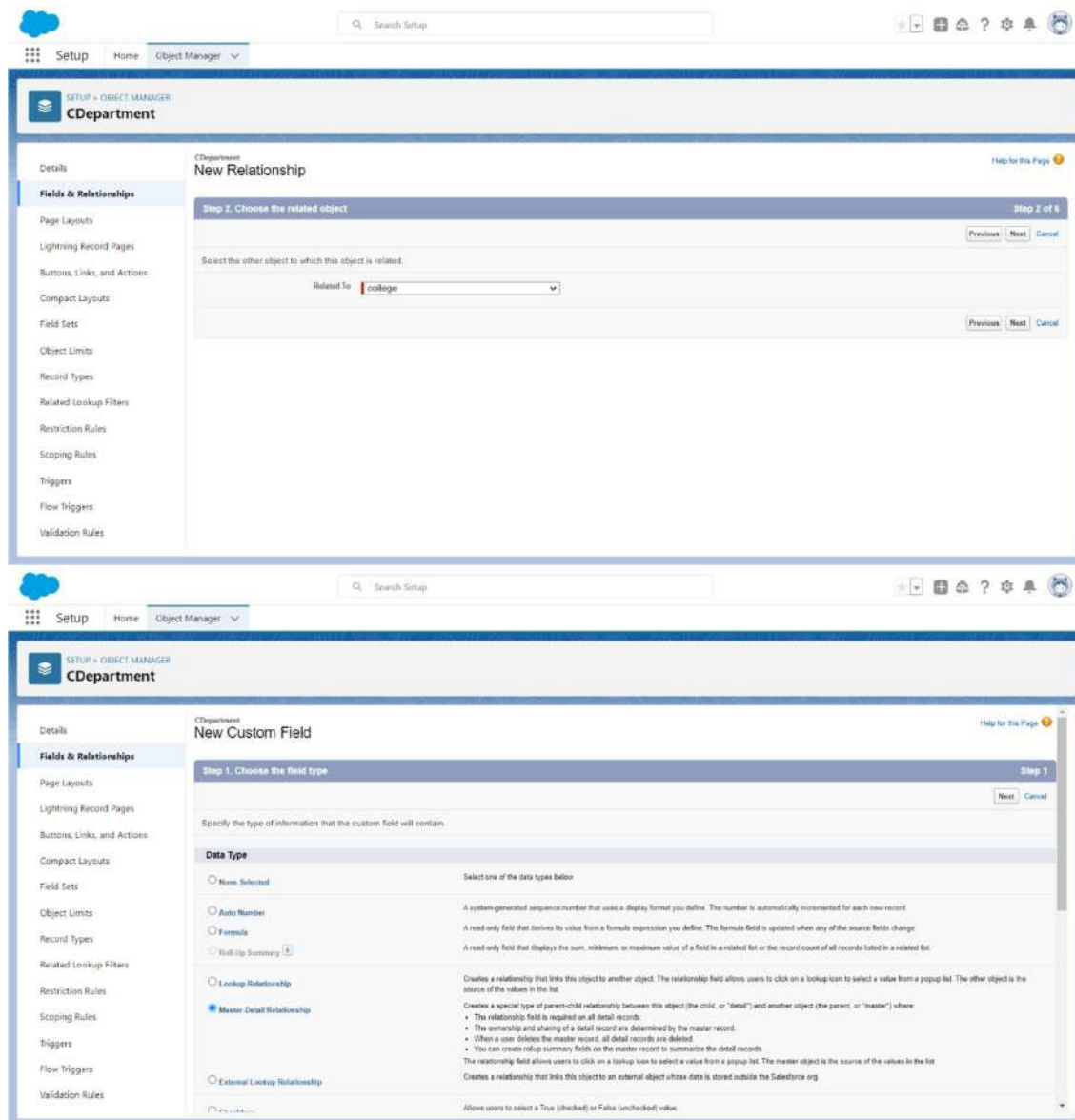
Allow reparenting
Child records can be reparented to other parent records after they are created.
☐ Child records can be reparented to other parent records after they are created.

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

Lookup Filter

PreviousNextCancel

Help for this Page

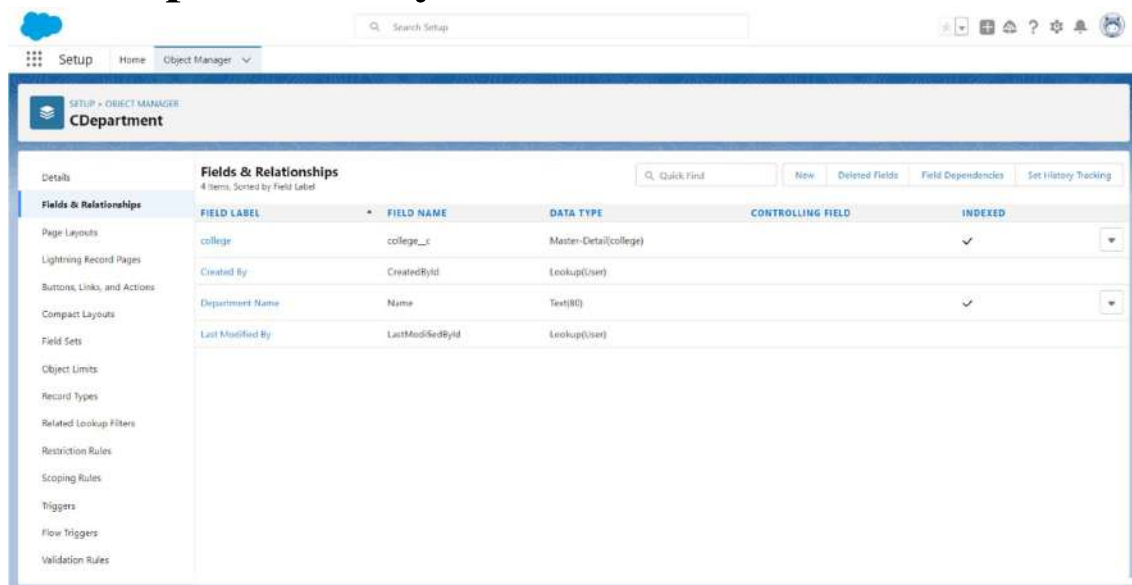


Step 3: Create the Roll-Up Summary Field

Now, let's create a Roll-Up Summary Field on the "College_C" to calculate the total number of related records in "Department__C":

1. Still on the "College__c" settings, go to "Fields & Relationships."

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



Setup

Home

Object Manager

Search Setup

tabs

User Interface

Rename Tabs and Labels

Tabs

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

SETUP

Tabs

Help for this Page

Custom Tabs

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

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

Custom Object Tabs

New What Is This?

Action	Label	Tab Style	Description
Edit Del	Book1	Icon	
Edit Del	Research Proposal	Icon Square	
Edit Del	Student	Icon	

Web Tabs

New What Is This?

No Web Tabs have been defined

Visualforce Tabs

New What Is This?

No Visualforce Tabs have been defined

Lightning Component Tabs

New What Is This?

No Lightning component tabs have been defined

Lightning Page Tabs

New What Is This?

No Lightning Page Tabs have been defined

Setup

Home

Object Manager

Search Setup

college

college

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

college

New Custom Field

Help for this Page

Step 5: Add to page layouts

Step 5 of 6

Previous Save & New Save Cancel

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

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

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

☒ Add Field Page Layout None

☒ college Layout

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

Previous Save & New Save Cancel

SetupHomeObject Manager

college

DetailsFields & RelationshipsPage LayoutsLightning Record PagesButtons, Links, and ActionsCompact LayoutsField SetsObject LimitsRecord TypesRelated Lookup FiltersRestriction RulesScoping RulesTriggersFlow TriggersValidation Rules

college

New Custom Field

Help for this Page

Step 4 of 5

PreviousNextCancel

Field Label	Total count
Data Type	Roll-Up Summary
Field Name	Total_count
Description	
Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.	
Field-Level Security for Profile	<input type="checkbox"/> Visible <input type="checkbox"/> Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
Cloud Kicks Admin	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
Contact Manager	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
customer	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
Platform.com - App Subscription User	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>

SetupHomeObject Manager

college

DetailsFields & RelationshipsPage LayoutsLightning Record PagesButtons, Links, and ActionsCompact LayoutsField SetsObject LimitsRecord TypesRelated Lookup FiltersRestriction RulesScoping RulesTriggersFlow TriggersValidation Rules

college

New Custom Field

Help for this Page

Step 3 of 5

PreviousNextCancel

Select Object to Summarize

Master Objectcollege

Summarized ObjectCDepartments

Required Information

Select Roll-Up Type

☒ COUNT☐ SUM☐ MIN☐ MAX

Field to Aggregate

Filter Criteria

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

PreviousNextCancel

SetupHomeObject Manager

college

DetailsFields & RelationshipsPage LayoutsLightning Record PagesButtons, Links, and ActionsCompact LayoutsField SetsObject LimitsRecord TypesRelated Lookup FiltersRestriction RulesScoping RulesTriggersFlow TriggersValidation Rules

collegeNew Custom FieldHelp for this Page

Step 2 of 5Step 2. Enter the detailsPreviousNextCancel

Field LabelTotal count

Field NameTotal_count

Description

Help Text

Auto add to custom report typeAdd this field to existing custom report types that contain this entity

PreviousNextCancel

SetupHomeObject Manager

college

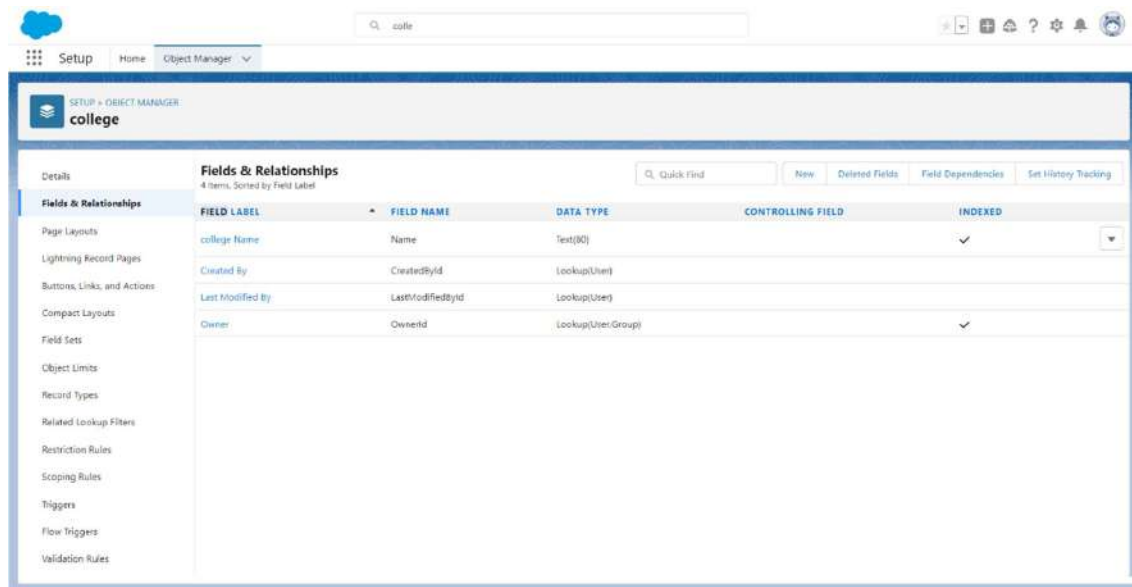
DetailsFields & RelationshipsPage LayoutsLightning Record PagesButtons, Links, and ActionsCompact LayoutsField SetsObject LimitsRecord TypesRelated Lookup FiltersRestriction RulesScoping RulesTriggersFlow TriggersValidation Rules

collegeNew Custom FieldHelp for this Page

Step 1 of 5Step 1. Choose the field typeNextCancel

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

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



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.

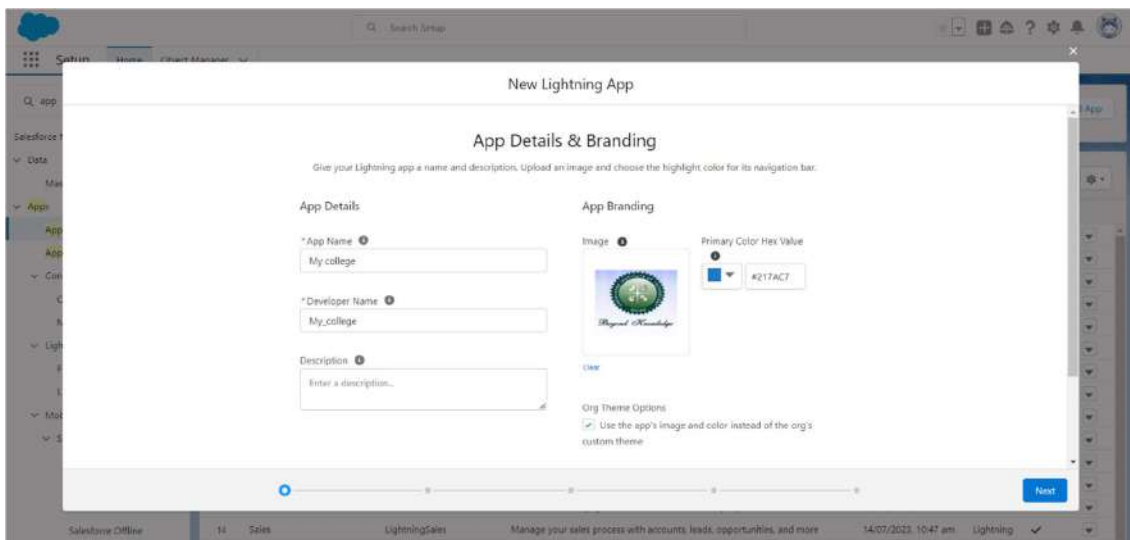
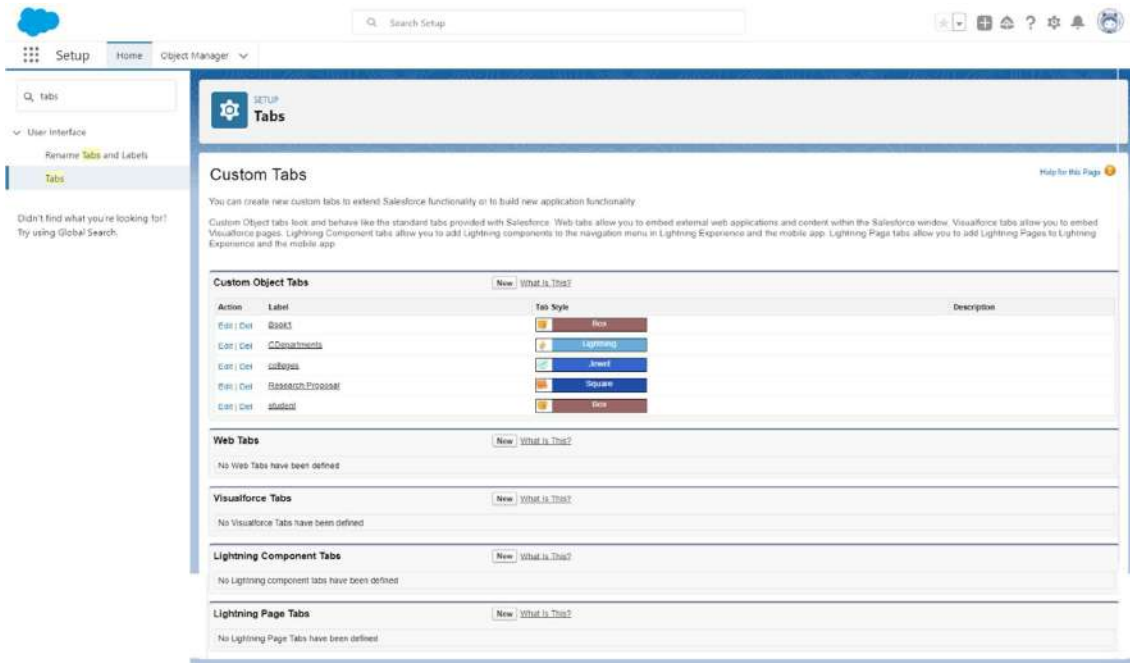
11. Test the app with the assigned users.

The screenshot shows the Salesforce Setup interface. The left sidebar contains navigation links: Setup, Home, Object Manager, and a search bar. The main content area is titled 'New Custom Object Tab' and is part of the 'Setup Tabs' section. It is currently on 'Step 2 of 3: Add to Profiles'. Below the title, there is a dropdown menu for 'Apply one tab visibility to all profiles' (Default On) and a radio button option for 'Apply a different tab visibility for each profile'. A table lists various user profiles with a 'Tab Visibility' column for each. The profiles include Analytics Cloud Integration User, Analytics Cloud Security User, Authenticated Website, Cloud Kicks Admin, Contract Manager, Cross Org Data Proxy User, Custom Marketing Profile, Custom Sales Profile, Custom Support Profile, customer, Customer Community Login User, Customer Community Plus Login User, Customer Community Plus User, Customer Community User, Customer Portal Manager Custom, Customer Portal Manager Standard, External Apps Login User, External Identity User, Force.com - App Subscription User, Force.com - Free User, Gold Partner User, High Volume Customer Portal, High Volume Customer Portal User, Identity User, Manager, Marketing User, Minimum Access - Salesforce, Partner App Subscription User, Partner Community Login User, Partner Community User, Read Only, Research Manager, Research Users, Salesforce API Only System Integrations, Sales User, security profile, Silver Partner User, Solution Manager, Standard Platform User, Standard User, and System Administrator. At the bottom right, there are 'Previous', 'Next', and 'Cancel' buttons.

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

The screenshot shows the Salesforce Lightning Experience App Manager interface. The left sidebar contains navigation links: Setup, Home, and Object Manager. The main content area is titled "Lightning Experience App Manager" and shows a list of 20 items, sorted by App Name. The list includes various Salesforce apps, each with columns for App Name, Developer Name, Description, Last Modified Date, App type, and Visibility.

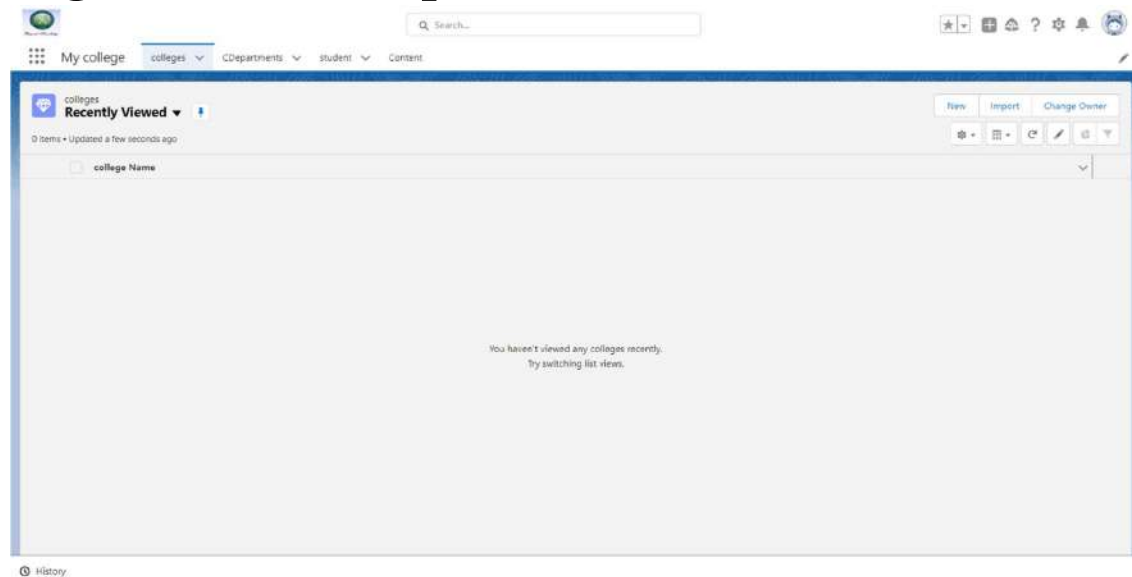
App Name ↑	Developer Name	Description	Last Modified Date	App ...	Visi...
1 All Tabs	AllTabsSet		14/07/2023, 10:47 am	Classic	✓
2 Analytics Studio	Insights	Build CRM Analytics dashboards and apps	14/07/2023, 10:47 am	Classic	✓
3 App Launcher	AppLauncher	App Launcher tabs	14/07/2023, 10:47 am	Classic	✓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



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.



app-d-der-ed.develop.lightning.force.com/lightning/u?college_c/new?context=1&nooverride=1&useRecordTypeCheck=1&navigationLocation=LIST_VIEW&uid=16961390...

My college colleges CDDepartments student Content

Recently Viewed 0 items • Updated a minute ago

college Name

New college

* = Required Information

Information

* college Name klor

phone 9087116402

Email klor@ac.in

Location

Latitude 90

Longitude 80

Owner krishna s

Cancel Save & New Save

History

My college colleges CDDepartments student Content

Recently Viewed 1 item • Updated a few seconds ago

Department Name

1 CDE

History

app-d-dee-ed.develop.lightning.force.com/lightning/o/CDepartment_c/new?count=3&nooveride=1&useRecordTypeCheck=1&navigationLocation=LIST_VIEW&uid=159...

My college

CDepartments

Recently Viewed

1 item • Updated a minute ago

Department Name

1

CDepartments

New CDepartment

to update, per another list view

* Required Information

Information

* Department Name

information technology

* college

kiot

email

it@gmail.com

phone


007577568

hod name

arul








about


Cancel Save & New Save



My collegecollegesCDepartmentsstudentContent

Search...



CDepartment

information technology

New ContactEditNew Opportunity

RelatedDetails

Department Name
information technology

college
kiot

email
it@gmail.com


phone
097577568

hod name
arul

about








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


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



My collegecollegesCDepartmentsstudentContent

Search...



college

kiot

New ContactEditNew Opportunity

RelatedDetails

college Name
kiot

Total count
1

phone
9087116402


Email
kiot@gmail.com

Location
90, 90

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








Last Modified By
krishna s. 01/10/2023, 11:17 am

Owner
krishna s.



My collegecollegesCDepartmentsstudentContent

Search...



CDepartments

Recently Viewed

NewImport


1 item • Updated a few seconds ago

Department Name

1

CDP

History



★


📁

🏠

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⚙️

🔔



My college

colleges

CDepartments

student

Content

colleges


Recently Viewed

1 item • Updated a few seconds ago

NewImportChange Owner

🔍📄🔄✎🗑️⌵

	college Name	
1	kiot	⌵



★


📁

🏠

?

⚙️

🔔



My college

colleges

CDepartments

student




Content

college

kiot

New ContactEditNew Opportunity

RelatedDetails

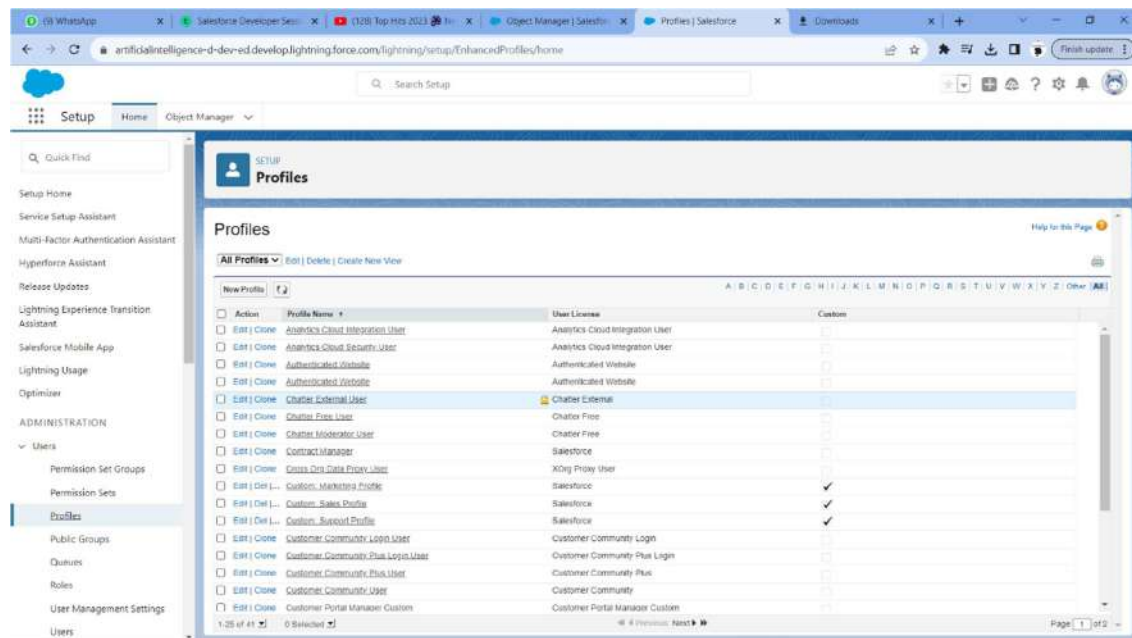
college Name	kiot	✎	Owner	 krishna s	⌵
Total count	2				
phone	9087116402	✎			
Email	kiot@gmail.com	✎			
Location	90, 80	✎			
Created By	 krishna s, 01/10/2023, 11:16 am		Last Modified By	 krishna s, 01/10/2023, 11:19 am	

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.



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

Profiles

Help for this Page

All Profiles | Edit | Delete | Create New View

New Profile

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

1.7 of 7 | 0 Selected | 4 Profiles listed | Page 1 of 1

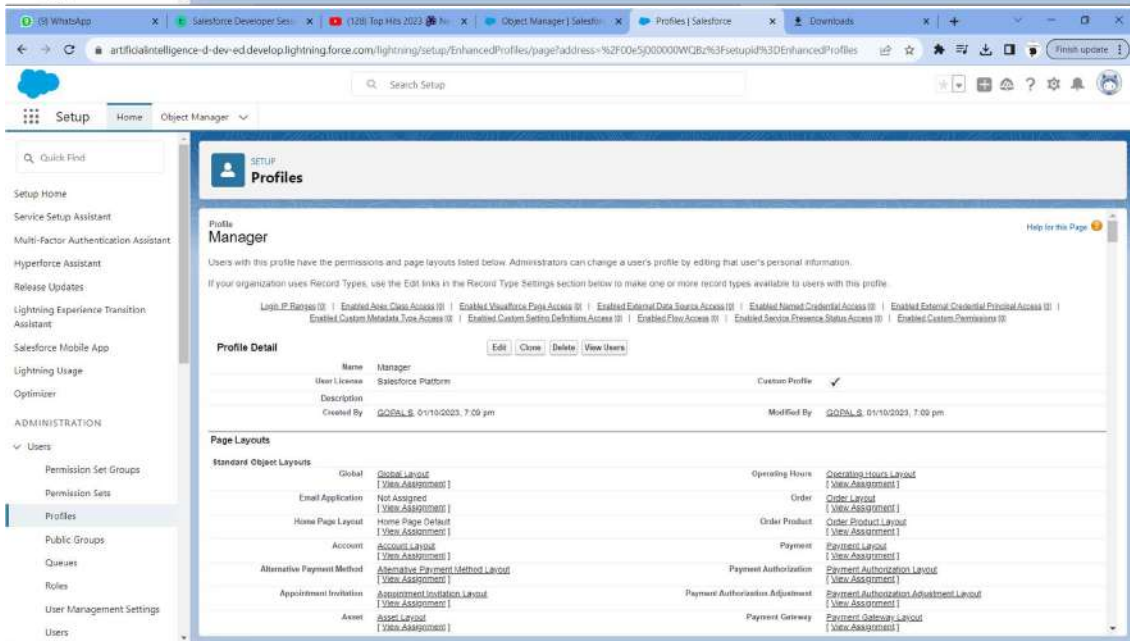
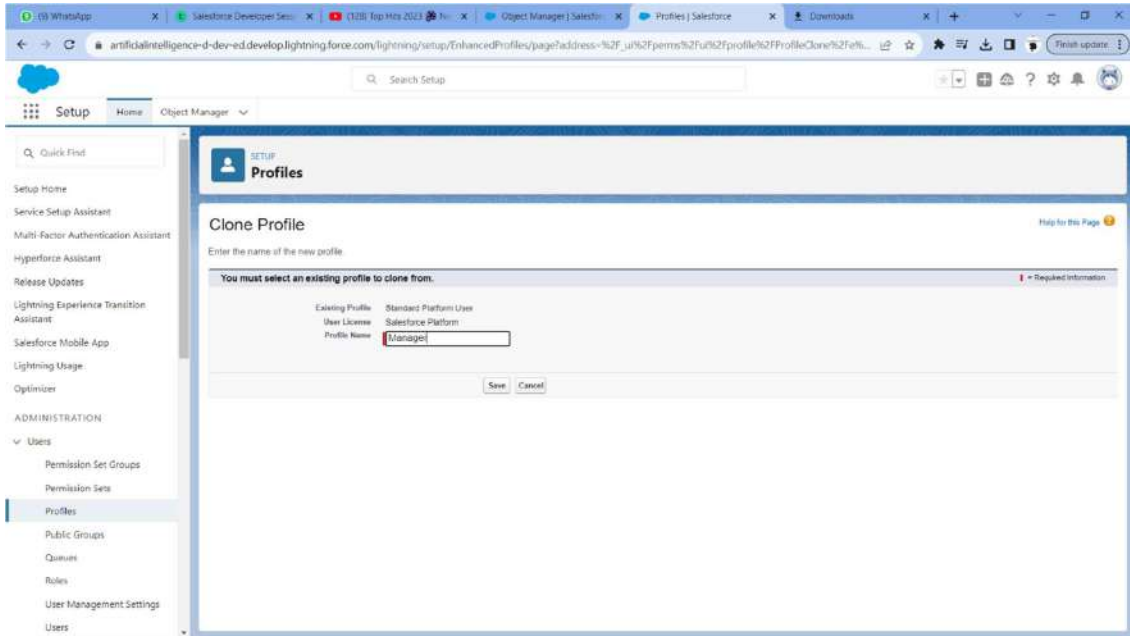
Clone Profile

Help for this Page

Enter the name of the new profile

You must select an existing profile to clone from. Required Information

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



Setup Profiles

Manager

Set the permissions and page layouts for this profile.

Profile Edit

Name: Manager

User License: Salesforce Platform

Description:

Custom Profile: ☒

Custom App Settings

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

Service Provider Access

Tab Settings

☐ Override user's personal tab customizations

Standard Tab Settings

Home: ☐ Default On

Accounts: ☒ Default On

Alert Settings: ☒ Default On

Learning: ☐ Default On

Libraries: ☒ Tab Hidden

Lightning Bulk Solutions: ☒ Default On

Setup Profiles

Communication Subscription Channel Types

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

Individuals

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

Custom Object Permissions

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

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: --None--

Password Policies

User passwords expire in: 90 days

Enforce password history: 3 passwords remembered

Minimum password length: 8

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Hyperforce Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage Optimizer

ADMINISTRATION

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Profiles

Object	Read	Create	Edit	Delete	View All	Modify All
Contact Point Addresses	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contact Point Consents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contact Point Emails	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Custom Object Permissions

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

Obtain secret answers for password: ☐

Require a minimum 1 day password shadow: ☐

Don't immediately expire links in forgot password emails: ☐

Setup Home

Service Setup Assistant

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Hyperforce Assistant

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ADMINISTRATION

Users

Permission Set Groups

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Users

Profiles

Object	Read	Create	Edit	Delete	View All	Modify All
Task	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
customers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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Require a minimum 1 day password shadow: ☐

Don't immediately expire links in forgot password emails: ☐

Setup Home

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Permission Sets

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Public Groups

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Users

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Custom Object Permissions

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

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Lockout effective period: 15 minutes

Obtain secret answer for password: ☐

Require a minimum 1 day password: ☐

Don't immediately expire links in forgot password emails: ☐

Users

All Users

On this page you can create, view, and manage users. In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices. [iOS](#) / [Android](#)

View: All Users | Edit | Create New User

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

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit Login	Adrianne Chis	adrianne	adrianne_chis@salesforce.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit Login	Charles Ernest	charles	charles_ernest@salesforce.com		<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/> Edit Login	Elanora Amela	elanora	elanora_amela@salesforce.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	S. JCPRL	SJ	SJ@salesforce.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	User Integration	user	user_integration@salesforce.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	user	user_security@salesforce.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

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

Setup Home Object Manager Users | Salesforce

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User Management Settings
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Data
Email
PLATFORM TOOLS
App

Users

New User

Help for this Page

User Edit Save Save & New Cancel

General Information

First Name
Last Name
Alias
Email
Username
Nickname
Title
Company
Department
Division

Role
User License
Profile
Action
Marketing User
Offline User
Knowledge User
Flow User
Service Chat User
Site.com Contributor User
Site.com Publisher User
Web User
Data.com User Type
Data.com Monthly Addition Limit
Accessibility Mode (Classic Only)
High Contrast Palette on Charts
Load Lightning Pages While Scrolling
Debug Mode

Required Information

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PLATFORM TOOLS
App

Users

New User

Help for this Page

User Edit Save Save & New Cancel

General Information

First Name
Last Name
Alias
Email
Username
Nickname
Title
Company
Department
Division

Role
User License
Profile
Action
Marketing User
Offline User
Knowledge User
Flow User
Service Chat User
Site.com Contributor User
Site.com Publisher User
Web User
Data.com User Type
Data.com Monthly Addition Limit
Accessibility Mode (Classic Only)
High Contrast Palette on Charts
Load Lightning Pages While Scrolling
Debug Mode

Required Information

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005500000AMuG03Fnoedirect%3D1%26SetUserEntityO...

Setup Home Object Manager Users

User: **sowmiya bala**

Permission Set Assignments (0) | Permission Set Group Assignments (0) | Permission Set License Assignments (0) | Personal Groups (0) | Public Groups Memberships (0) | Queue Memberships (0) | Roles (0) | Managers in the Role Hierarchy (0) | Default Roles (0) | Third-Party Account Links (0) | Installed Mobile Apps (0) | Authentication Settings for External Systems (0) | Login History (0) | User-Provided Accounts (0)

User Detail

Name	sowmiya bala	Role	Salesforce Platform
Alias	sbiata	User License	Profile
Email	2k20ce178@kot.ac.in Verify	Active	Manage
Username	2k216@kot.ac.in	Marketing User	<input checked="" type="checkbox"/>
Nickname	User1695467720295402616	Offline User	<input type="checkbox"/>
Title	worker	Knowledge User	<input type="checkbox"/>
Company	kot bank	Flow User	<input type="checkbox"/>
Department		Service Cloud User	<input type="checkbox"/>
Division		Site.com Contributor User	<input type="checkbox"/>
Address		Site.com Publisher User	<input type="checkbox"/>
Time Zone	(GMT+05:30: India Standard Time (Asia/Kolkata)	WDC User	<input type="checkbox"/>
Locale	English (India)	Mobile Push Registrations	<input type="checkbox"/>
Language	English	Data.com User Type	<input type="checkbox"/>
Delegated Approver		Accessibility Mode (Classic Only)	<input type="checkbox"/>
Manager		Debug Mode	<input type="checkbox"/>
Receive Approval Request Emails	Only if I'm an approver	High-Contrast Palette on Charts	<input type="checkbox"/>
Federation ID		Load Lightning Pages While Scrolling	<input type="checkbox"/>
App Registration: One-Time Password Authenticator	<input type="checkbox"/>	Salesforce CRM Context User	<input checked="" type="checkbox"/>
App Registration: Salesforce Authenticator	<input type="checkbox"/>		

mail.google.com/mail/u/0/#inbox/FMfcgGtStISqK0LzC0i6DnsQk0v

Compose

Inbox 5,216

Starred

Snoozed

Sent

Drafts 5

More

Labels

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

7:13 PM (0 minutes ago)

1 of 6,486

salesforce

Welcome to Salesforce!

Click below to verify your account

[Verify Account](#)

To easily log in later, save this URL:

<https://artificialintelligence-d-dev-ed.develop.my.salesforce.com>


Username:

[2k216@kot.ac.in](#)

Again, welcome to Salesforce!

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artificialintelligence-d-dev-ed.develop.my.salesforce.com/_ui/system/security/ChangePassword?retURL=%2Fhome%2Fhome.jsp&fromFrontdoor=1&setupId=Ch...



Change Your Password

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

- 8 characters
- 1 letter
- 1 number

* New Password

* Confirm New Password

Security Question

In what city were you born?


* Answer

Change Password

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

Login | Salesforce

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



Username

Password


Log In

☐ Remember me

[Forgot Your Password?](#)

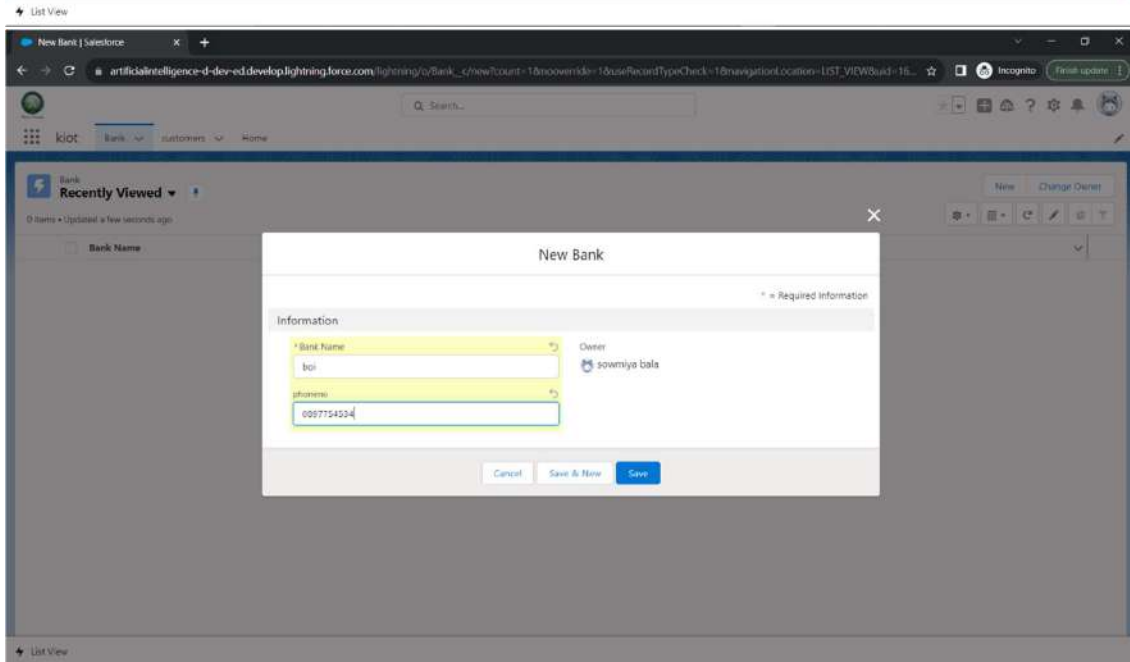
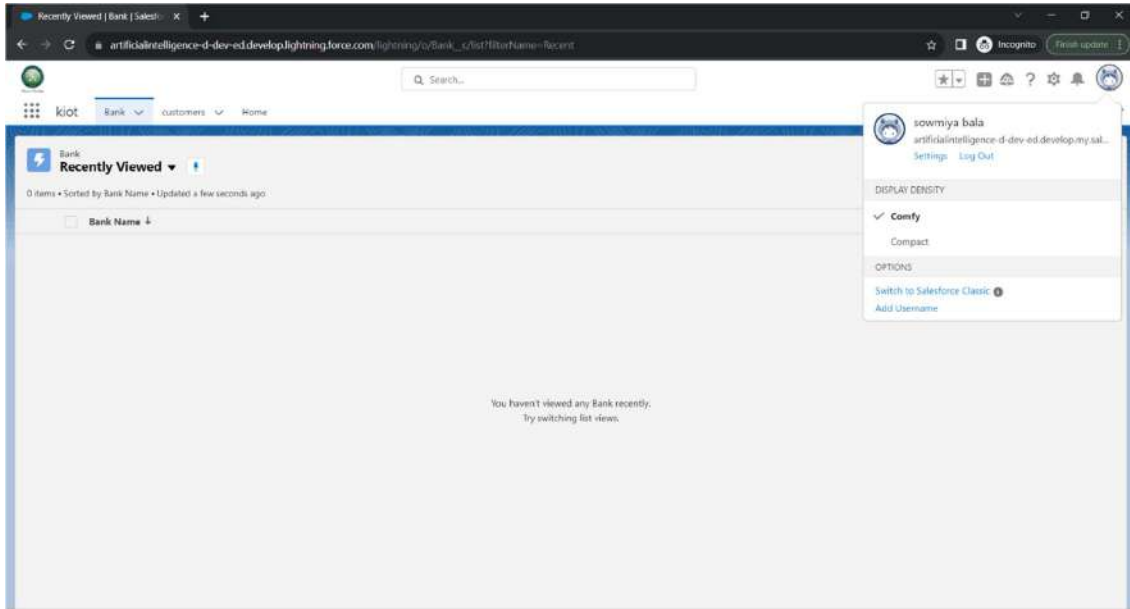
Join us for the future of trusted enterprise AI, streaming on Salesforce+.

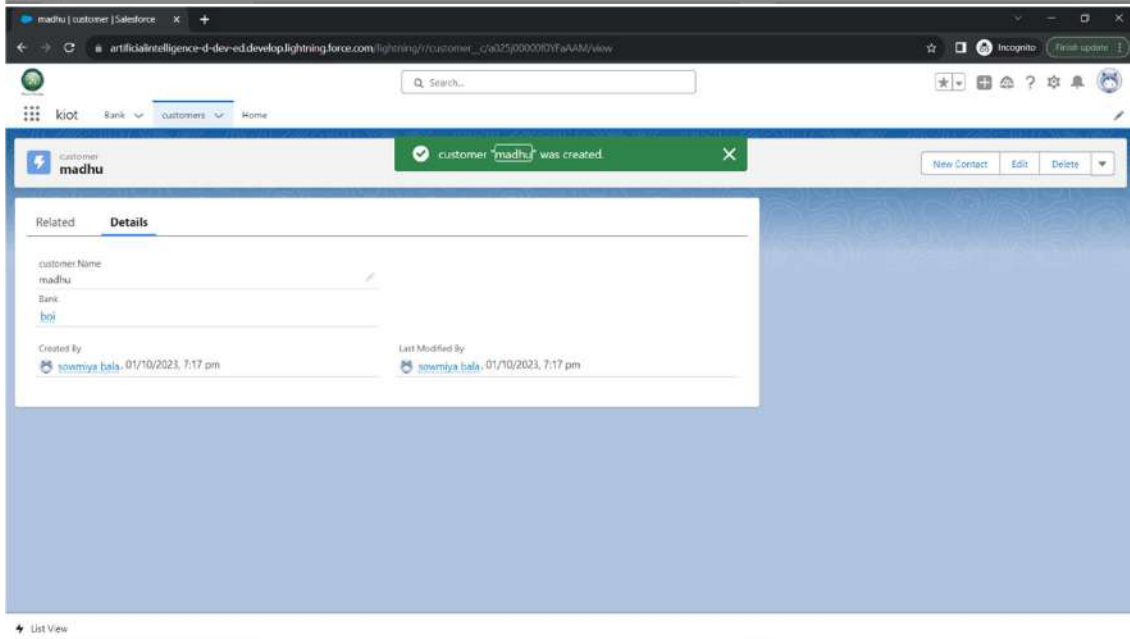
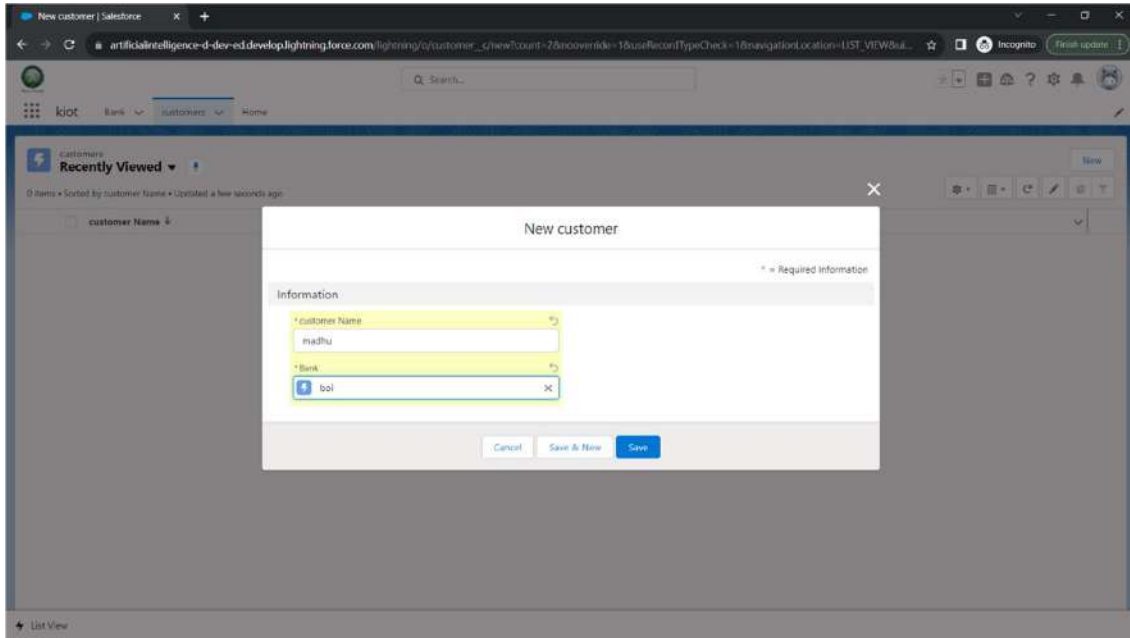
WATCH ON DEMAND



AI Day

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

Profiles

Help for this Page

All Profiles | Edit | Create New View

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

1 of 7 | 0 Selected | 4 Previous Next >

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

Clone Profile

Help for this Page

Enter the name of the new profile

You must select an existing profile to clone from. * Required information

Existing Profile	User License
Standard Platform User	Salesforce Platform

Profile Name:

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

Profiles

Profile: **salesmanage**

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

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

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

Profile Detail [Edit] [Clone] [Delete] [View Users]

Name	salesmanage	Custom Profile	<input checked="" type="checkbox"/>
User License	Salesforce Platform		
Description			
Created By	GD0SLB, 01/10/2023, 7:19 pm	Modified By	GD0SLB, 01/10/2023, 7:19 pm

Page Layouts

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

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Profiles

Profile Edit: **salesmanage**

Set the permissions and page layouts for this profile.

Profile Edit [Save] [Save & New] [Cancel]

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

Custom App Settings [Required Information]

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

Service Provider Access

Tab Settings

☐ Override user's personal tab customizations

Standard Tab Settings

Name	Default On	Learning
Accounts	<input checked="" type="checkbox"/>	Default On

Setup Profiles

Custom Object Permissions

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

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: --None--

Password Policies

User passwords expire in: 90 days

Enforce password history: 3 passwords remembered

Minimum password length: 8

Password complexity requirement: Must include alpha and numeric characters

Password question requirement: Cannot contain password

Maximum invalid login attempts: 10

Lockout effective period: 15 minutes

Obscure secret answer for password resets: ☐

Require a minimum 1 day password lifetime: ☐

Don't immediately expire links in forgot password email: ☐

Setup Profiles

Custom Object Permissions

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

Session Settings

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User passwords expire in: 90 days

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Password complexity requirement: Must include alpha and numeric characters

Password question requirement: Cannot contain password

Maximum invalid login attempts: 10

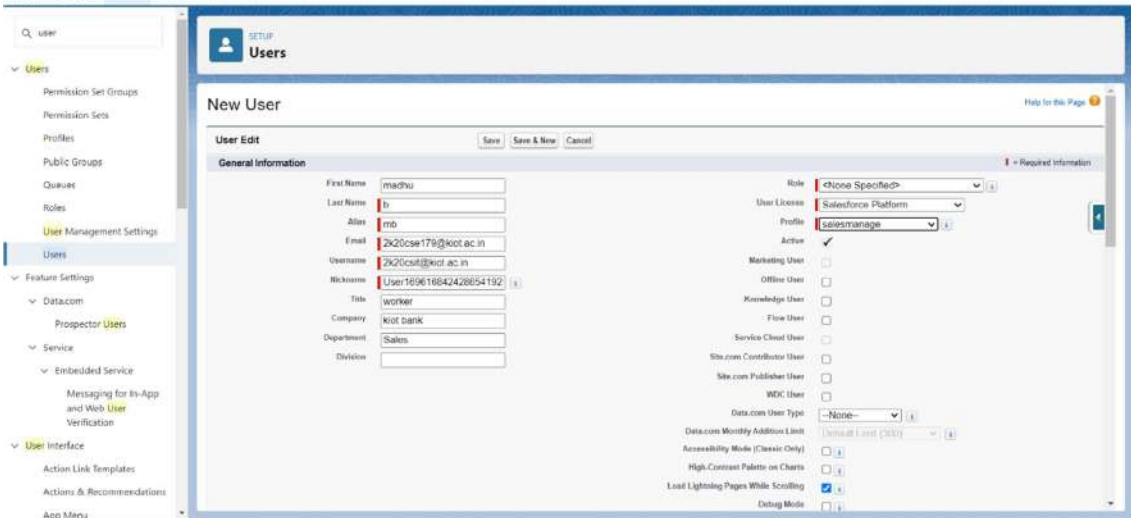
Lockout effective period: 15 minutes

Obscure secret answer for password resets: ☐

Require a minimum 1 day password lifetime: ☐

Don't immediately expire links in forgot password email: ☐

Save Save & New Cancel



Setup Home Object Manager

Search Setup

user

Users

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

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

Setup Home Object Manager

Search Setup

user

Users

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

Setup Users

Mailing Address

Street 4794 aryanpalayam, uthamapalayam

City SALEM

Zip/Postal Code 636308

State/Province TAMIL NADU

Country

Single Sign On Information

Federation ID

Locale Settings

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

Locale English (India)

Language English

Approver Settings

Delegated Approver

Manager

Receive Approval Request Emails Only if I am an approver

☒ Generate new password and notify user immediately

Save Save & New Cancel

Setup

Users

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Service

Embedded Service

Messaging for In-App and Web User Verification

User Interface

Action Link Templates

Actions & Recommendations

App Menu

Users

User Detail

Name: madhu b

Alias: mb

Email: 2k20cast178@knot.ac.in

Username: 2k20cast@knot.ac.in

Nickname: User16951684242855419205

Title: worker

Company: knot bank

Department: Sales

Division:

Address: A/194, arjampalayam, umamangalapuram, Palakkadu, 686008, TAMIL NADU

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

Locale: English (India)

Language: English

Delegated Approver Manager: Only if I am an approver

Federation ID:

App Registration One-Time Password Authenticator:

Role

User License: Salesforce Platform

Profile: salesmanager

Active: ☒

Marketing User: ☐

Offline User: ☐

Knowledge User: ☐

Flow User: ☐

Service Cloud User: ☐

Site.com Contributor User: ☐

Site.com Publisher User: ☐

WDC User: ☐

Mobile Push Registrations: ☐

Data.com User Type: ☐

Accessibility Mode (Classic Only): ☐

Debug Mode: ☐

High-Contrast Palette on Chatter: ☐

Load Lightning Pages While Scrolling: ☒

WhatsApp

Salesforce Developer Session 2

11:20 Top Mts 2023

New P...

Users | Salesforce

Welcome to Salesforce: Verify y...

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005J00000AMuV%3Fnooredirect%3D1%26%3FUserEn...

Search Setup

Setup

Home

Object Manager

Search in mail

Compose

Mail

Inbox 5,218

Starred

Snoozed

Sent

Drafts 5

More

Labels

Active

1 of 6,486

Knowledge

Verify Account

Click below to verify your account.

To easily log in later, save this URL:

<https://artificialintelligence-d-dev-ed.develop.my.salesforce.com>

Username:

2k20cast@knot.ac.in

Again, welcome to Salesforce!

© Copyright 2000-2019 salesforce.com, inc. All rights reserved. Various trademarks held by their respective owners.

Salesforce.com, inc. The Landmark at One Market, Suite 200, San Francisco, CA, 94105, United States


Reply

Forward

Change Your Password | Salesforce

artificialintelligence-d-dev-ed.develop.my.salesforce.com / ui/system/security/ChangePassword?urlURL=%2Fhome%2Fhome.jsp&fromFrontdoor=1&startUrl=ChangePa...

Incognito (3) Finish update



Change Your Password

Enter a new password for 2k20cst@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 | Sales | X

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

Incognito (3) Finish update

Search...

kiot Bank customers Home

Bank

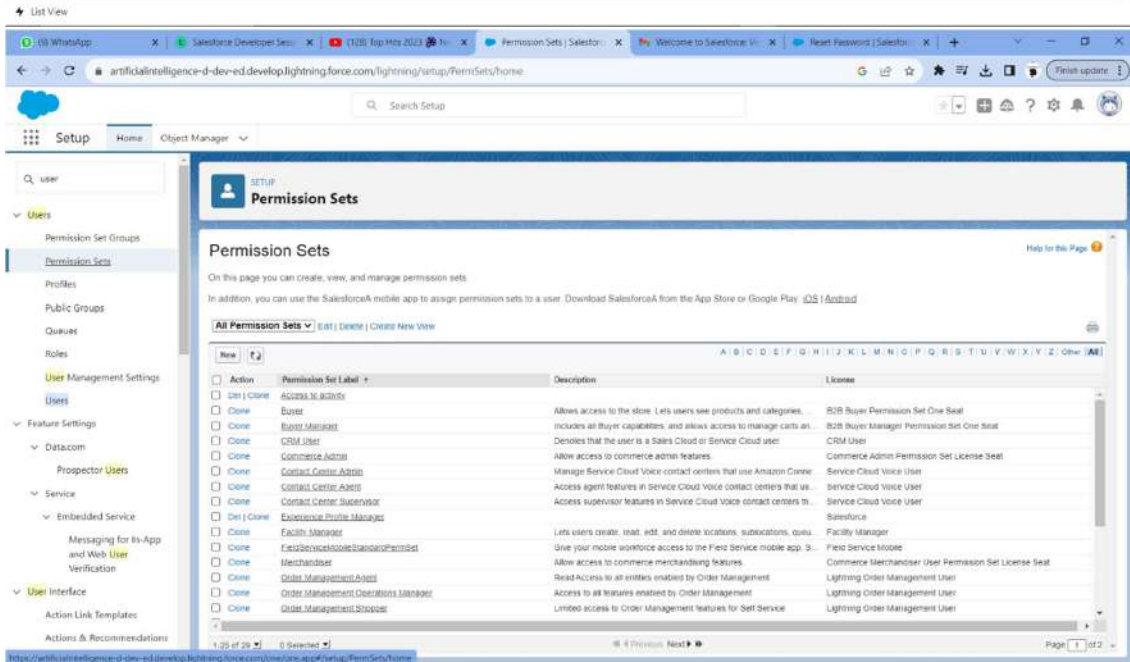
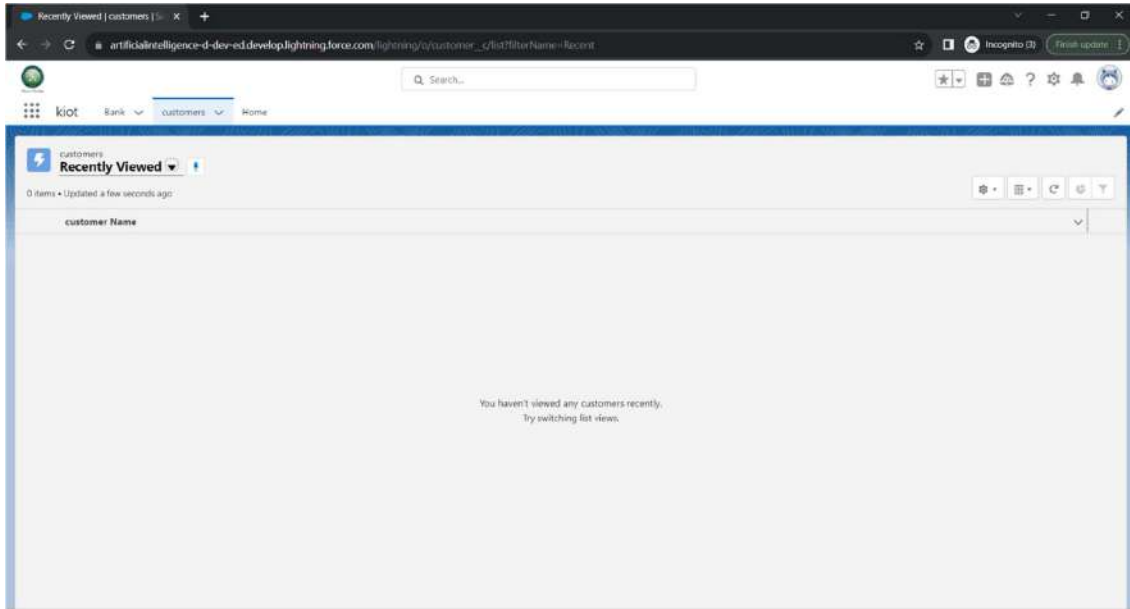
Recently Viewed

0 items • Updated a few seconds ago

Bank Name

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

List View



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 I-Jser A and I-Jser 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 IJser 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:

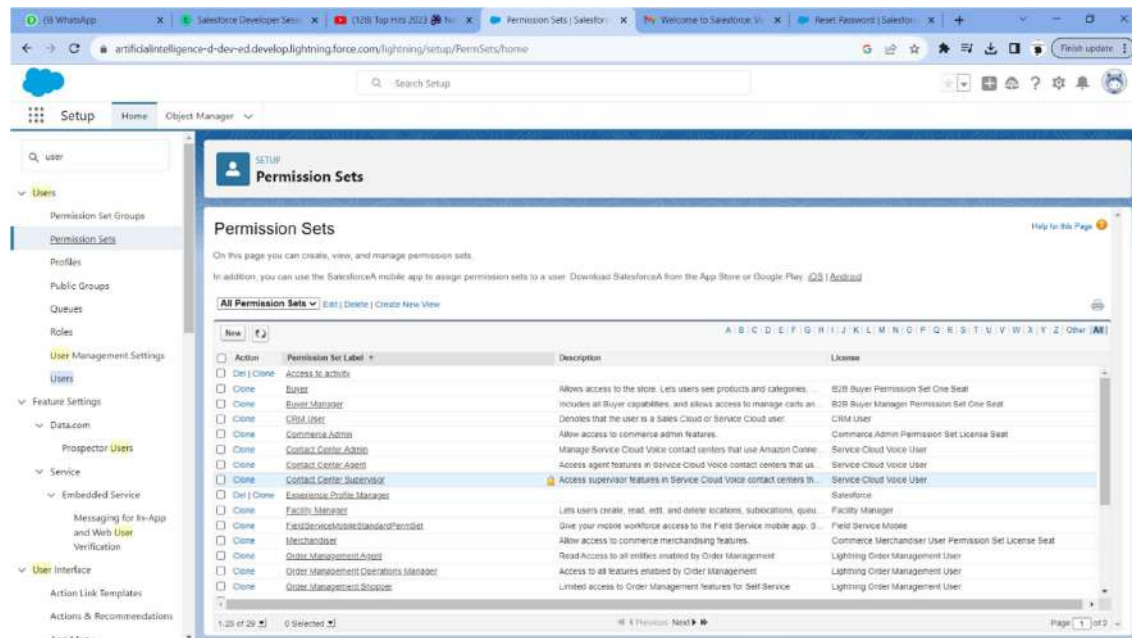
- Ensure that the Account records are owned by the respective users, with User A owning their records and User B owning their records.

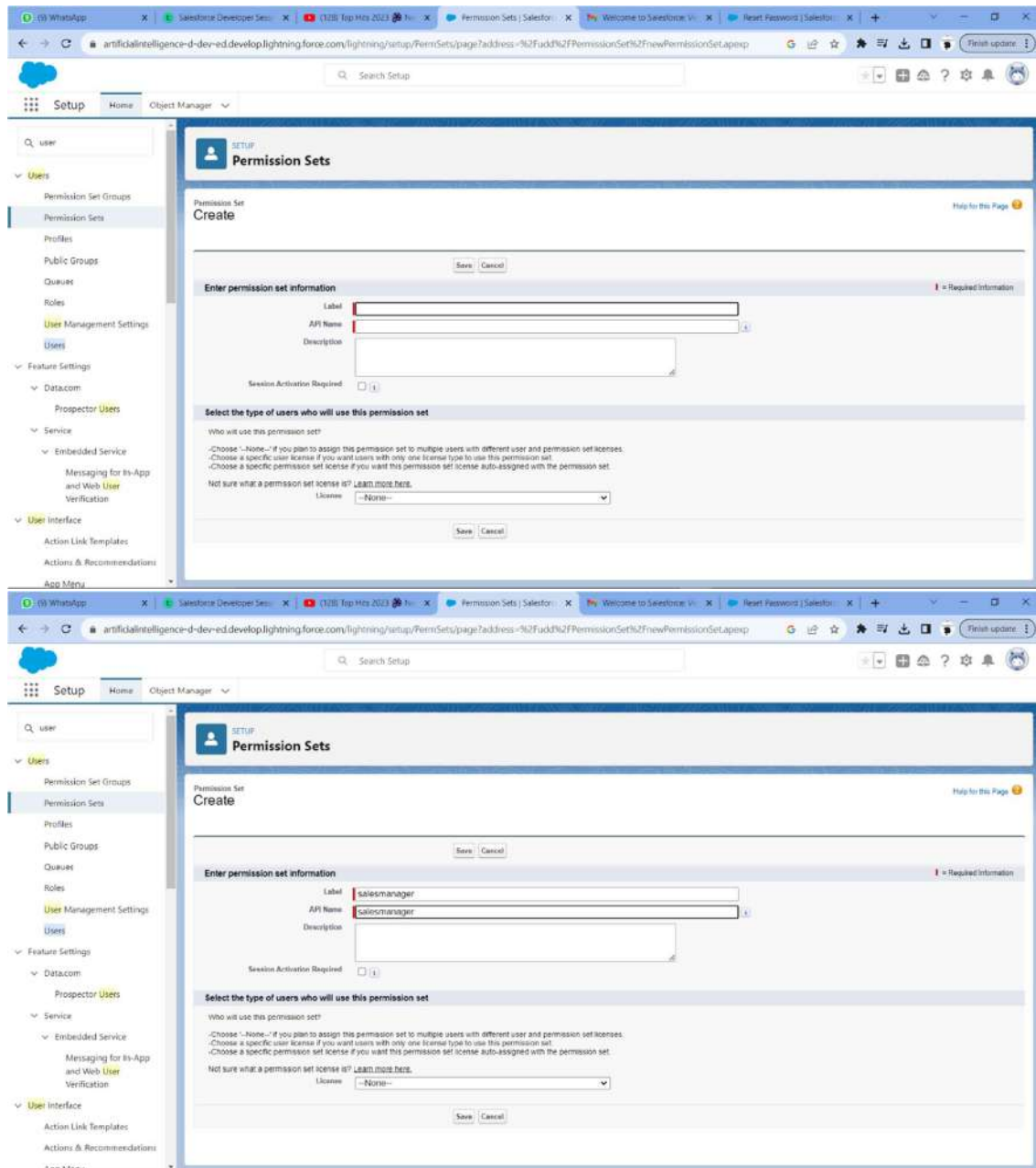
Organization-Wide Defaults:

- 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.





Setup Home Object Manager

user

Users

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

Feature Settings

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

User Interface

- Action Link Templates
- Actions & Recommendations
- App Menu

Permission Sets

Permission Set: salesmanager

Find Settings Clone Delete Edit Properties Manage Assignments

Permission Set Overview

Description	API Name
License	salesmanager

Session Activation Required: ☐ Namespace Prefix:
Created By: GORAL S. 01/19/2023, 7:29 pm
Last Modified By: GORAL S. 01/19/2023, 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

Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform [Learn More](#)

Setup Home Object Manager

user

Users

- Permission Set Groups
- Permission Sets
- Profiles
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Feature Settings

- Data.com
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- Service
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- Actions & Recommendations

Permission Sets

Permission Set: salesmanager

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	42	—
AI Insight Reasons	No Access	—	—
AI Record Insights	No Access	—	—
Alternative Payment Methods	No Access	27	—
API Anonymous Event Stores	No Access	14	—
App Analytics Query Results	No Access	—	—
Application Usage Assessments	No Access	—	—
Appointment Categories	No Access	3	—
Appointment Invitations	No Access	17	—
Appointment Invites	—	4	—
Appointment Schedule Arrangements	No Access	—	—
Appointment Schedule Logs	No Access	—	—
Appointment Topic Time Slots	No Access	6	—
Asset Actions	No Access	30	—
Asset Action Sources	No Access	18	—
Asset Relationships	—	10	—
Assets	No Access	42	—
Asset Data Periods	No Access	11	—

Setup Home Object Manager

user

Users

- Permission Set Groups
- Permission Sets
- Profiles
- Public Groups
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- User Management Settings
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Feature Settings

- Data.com
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- Actions & Recommendations

Permission Set

salesmanager

Find Settings Clone Delete Edit Properties Manage Assignments

Permission Set Overview Object Settings Bank

Bank

Tab Settings

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

Object Permissions

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

Field Permissions

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

Setup Home Object Manager

user

Users

- Permission Set Groups
- Permission Sets
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- Public Groups
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- App Menu

Permission Set

salesmanager

Find Settings Clone Delete Edit Properties Manage Assignments

Permission Set Overview Object Settings Bank

Bank

Save Cancel

Tab Settings

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

Object Permissions

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

Field Permissions

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

Setup Home Object Manager

Search Setup

user

Users

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

Feature Settings

- Data.com
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User Interface

- Action Link Templates
- Actions & Recommendations
- App Menu

salesmanager

Current Assignments

No assignments defined.

Add Assignment

Setup Home Object Manager

Search Setup

user

Users

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

Feature Settings

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User Interface

- Action Link Templates
- Actions & Recommendations
- App Menu

Select Users to Assign

All Users

1 item selected

Search this list...

	Full Name ↑	All...	Username	Role	Act...	Profile
<input type="checkbox"/>	Amelia Ellington	aelli	amelia.ellington.146kcp3oodh.d5cwpdcu04wh.hnb0wmvwhq.aguctpr1delv@gmail.com		<input checked="" type="checkbox"/>	Force.com - App Subscription User
<input type="checkbox"/>	Chatter Expert	Chatter	chatty0045j00000bckkxwb.t09bhempgjke@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter First User
<input type="checkbox"/>	Diya Adams	dadan	test_diya_ges-felljybtwkt.rugrgskvpx.3gikofozzems.M43kuzefmne@gmail.com		<input checked="" type="checkbox"/>	UMS User
<input type="checkbox"/>	GPCL S	GS	kio6209@gmail.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Integration User	integ	integration@0045j00000bckkxwb.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input checked="" type="checkbox"/>	mudhu In	mb	2k20csh@kio.ac.in		<input checked="" type="checkbox"/>	salesmanager
<input type="checkbox"/>	Security User	sec	insightssecurity@0045j00000bckkxwb.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User
<input type="checkbox"/>	sreemya bala	sbala	2k21n@kio.ac.in		<input checked="" type="checkbox"/>	Manager

Cancel

Assign

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/DPSJ00008PHok/PermissionSetAssignment/new

Setup Home Object Manager

Search Setup

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

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Data.com

Prospector Users

Service

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Action Link Templates

Actions & Recommendations

App Menu

Select an Expiration Option for Assigned Users

☒ No expiration date

☐ Specify the expiration date

Time Zone: Select a time zone...

Selected Users

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

Cancel Back Assign

artificialintelligence-d-dev-ed.develop.lightning.force.com/one/one.app#eyJib21wb25lbnREZWY0LjZXR1cF9wbG9ZwZURic2F5ZDZlM1hRQWdlbm...

Setup Home Object Manager

Search Setup

Users

Permission Set Groups

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User Management Settings

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Action Link Templates

Actions & Recommendations

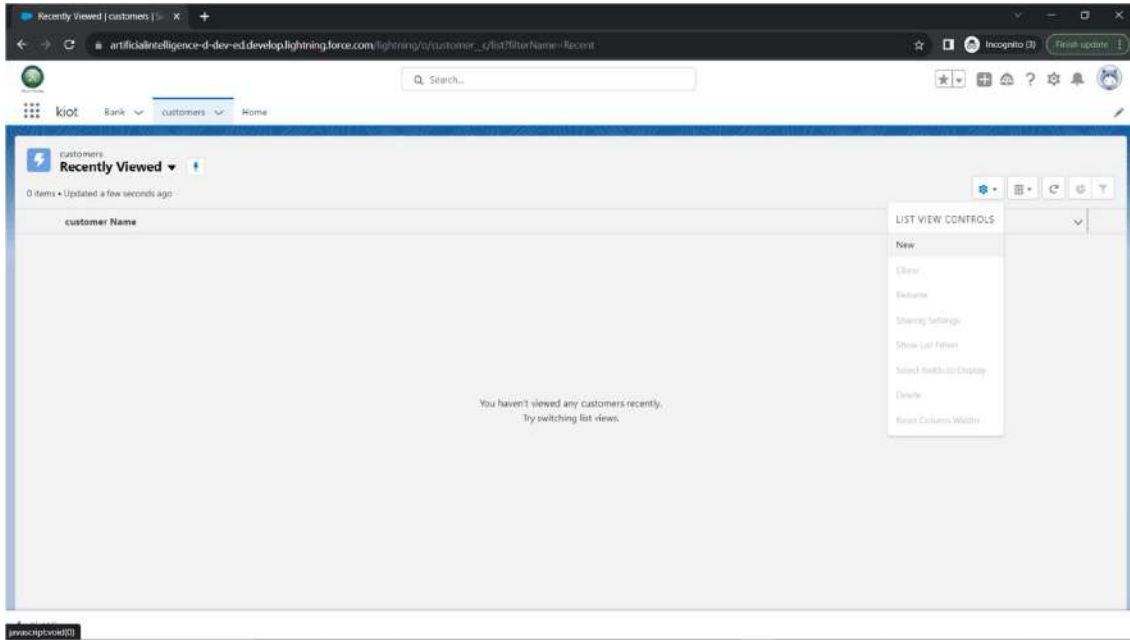
App Menu

PERMISSION SET SALESMANAGER 1 assignments were successful

Assignment Summary

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

Done

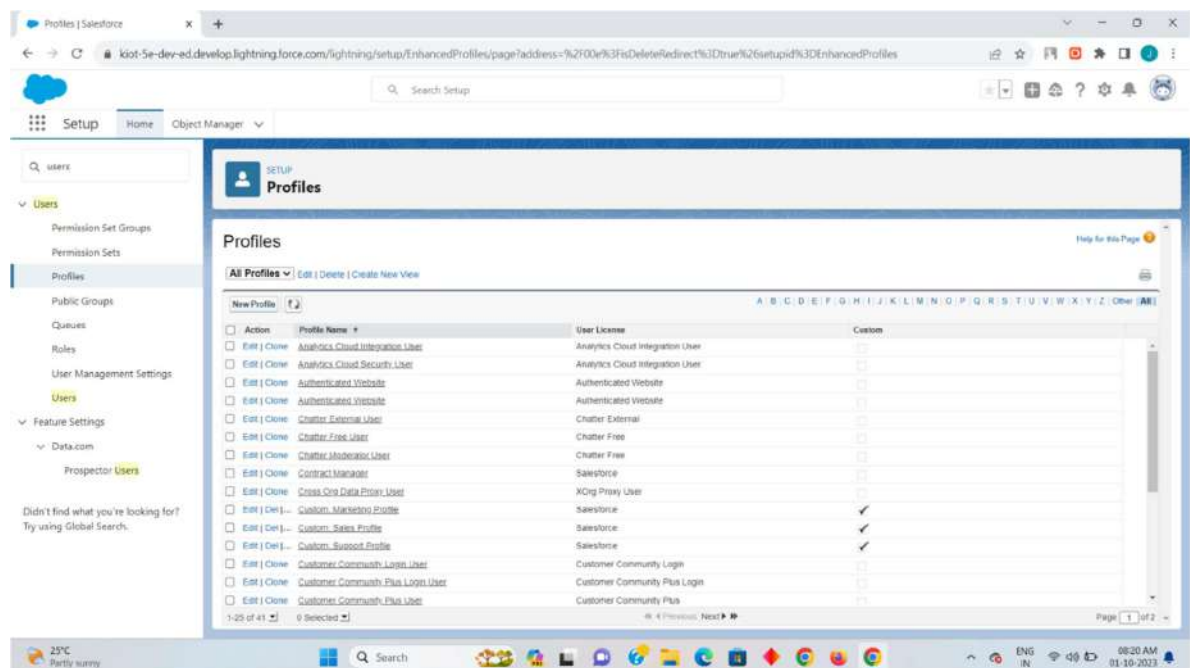


3. . Suppose there are 2 Users and they are having Create, Read, Edit access on Account Object with the same profile but we want to open up the access for one user to delete how will you implement the Security setting.

Solution:

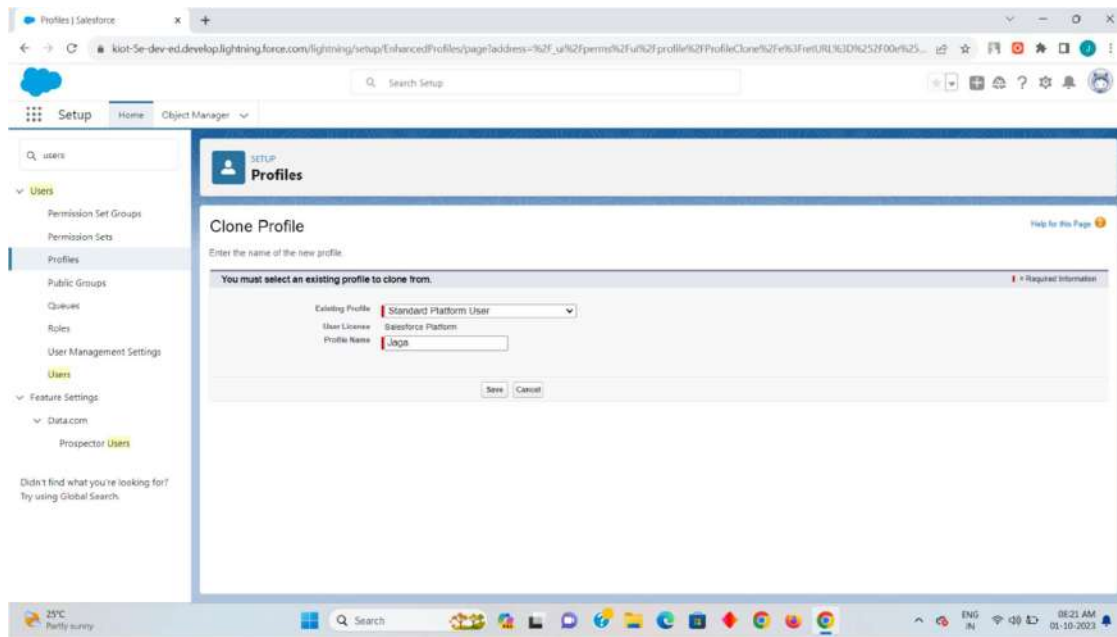
Step 1: we need create a profile for the two user which has the access to Create, Read, Edit for follow as per.

Setup-quick search[profile]



Step 2:

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



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

Step 3:

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

The screenshot shows the Salesforce Setup interface for the 'Profiles' section. The left sidebar contains navigation links for Users, Profiles, Public Groups, Outposts, Rules, User Management Settings, Users, Feature Settings, Data.com, and Prospector Users. The main content area displays the 'Jaga' profile configuration. The 'Profile Detail' section shows the profile name 'Jaga', user license 'Salesforce Platform', and a checked 'Custom Profile' checkbox. The 'Page Layouts' section lists various standard object layouts and their associated page layouts, including Global, Email Application, Home Page Layout, Account, Alternative Payment Method, Appointment Location, Operating Hours, Order, Order Product, Payment, Payment Authorization, and Payment Authorization Adjustment. The bottom status bar shows the system time as 08:21 AM on 01-10-2023.

Profiles | Salesforce

Setup Home Object Manager

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Outposts

Rules

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

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

Profile: Jaga

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.

Setup, Profiles | Enabled Apex Class Access | Enabled Visualforce Page Access | Enabled External Data Source Access | Enabled Named Credential Access | Enabled External Credential/External Access | Enabled Custom Metadata View Access | Enabled Custom Settings/Definitions Access | Enabled Chatter Access | Enabled Service Resource Status Access | Enabled Custom Permissions

Profile Detail

Name: Jaga

User License: Salesforce Platform

Custom Profile: ☒

Description:

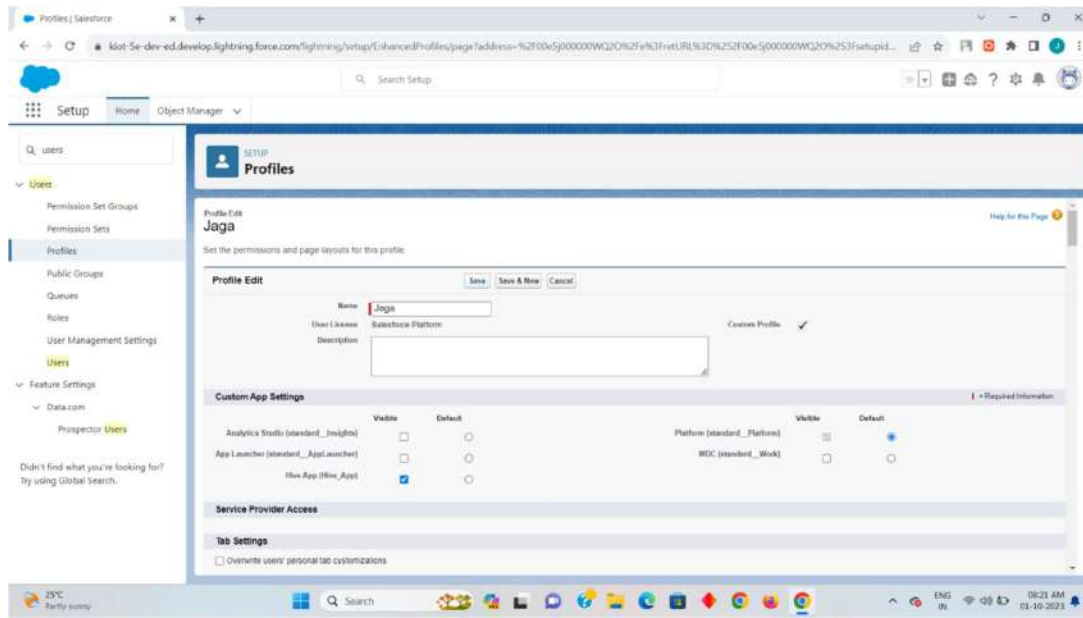
Created By: jayashree S. 01/10/2023, 9:21 am

Modified By: jayashree S. 01/10/2023, 9:21 am

Page Layouts

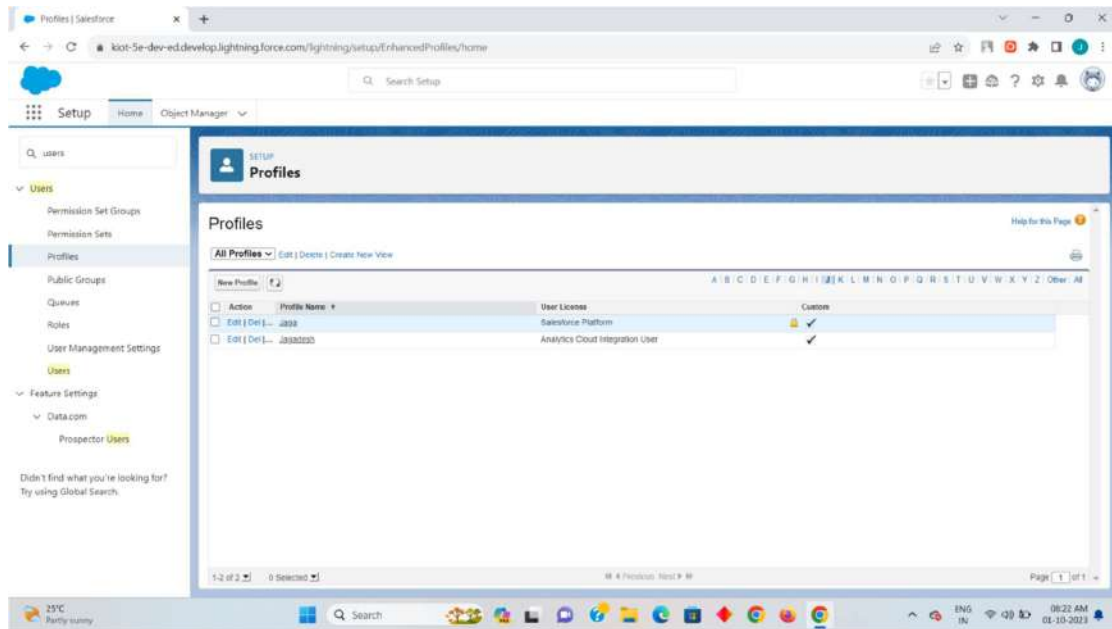
Standard Object Layouts	Global	Operating Hours	Order
Global Layout	[View Assignment]	Operating Hours Layout	[View Assignment]
Email Application	Not Assigned	Order Layout	[View Assignment]
Home Page Layout	Home Page Default	Order Product	Order Product Layout
Account	Account Layout	Payment	Payment Layout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

The screenshot shows the Salesforce Setup page for Profiles. The left sidebar contains the navigation menu with 'Profiles' selected. The main content area is titled 'Profiles' and displays a table of permissions for the 'Profiles' object. The table has columns for 'Communication Subscription Consents', 'Communication Subscription Settings', 'Contacts', 'Contact Point Addresses', 'Contact Point Consents', and 'Contact Point Emails'. Each column has a row of checkboxes. Below the table, there are sections for 'Custom Object Permissions', 'Session Settings', and 'Session Security Level Required at Login'.



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



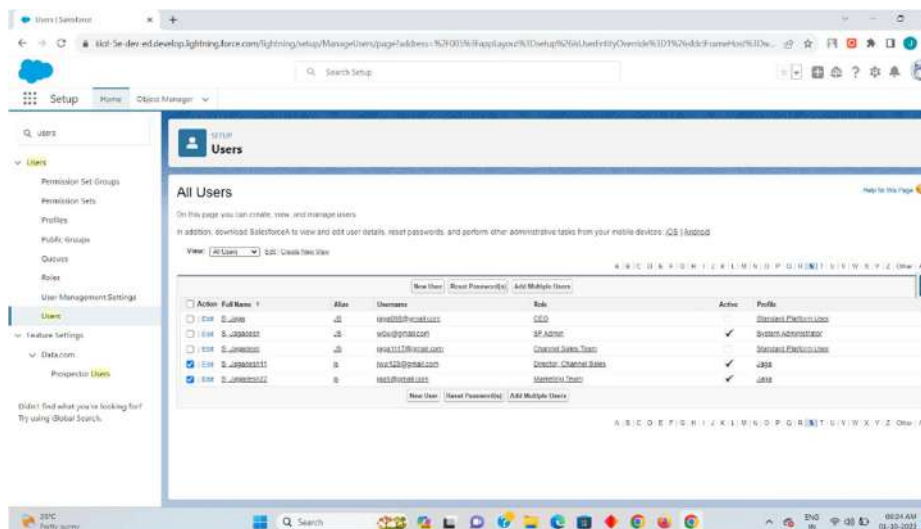
Step 5:

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 users are created click on save.

The screenshot displays the Salesforce 'Users' management interface. The left sidebar contains the 'Setup' menu with 'Users' selected. The main content area is titled 'All Users' and provides instructions on how to create, view, and manage users. Below the instructions, there is a table of users with columns for Action, Full Name, Alias, Username, Role, Active status, and Profile. The table lists several users, including Chatter, Jaga, and various system users. The 'Active' column has checkboxes, and the 'Profile' column lists the assigned profiles. The bottom of the page shows a Windows taskbar with the date 01-18-2023 and time 08:22 AM.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Chatter, Expert	Chatter	chatter.00000000000000000000000000000000@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	Goer, Jane	GOER	jane_goer@goer.com		<input checked="" type="checkbox"/>	Customer Community User
<input type="checkbox"/>	Jaga	J	jaga@jaga.com	CEO	<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	Jaga	J	jaga@jaga.com	SF Admin	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Jaga	J	jaga1111@jaga.com	Channel Sales Team	<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	User Integration	integ	integration@00000000000000000000000000000000.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	User Security	sec	security@00000000000000000000000000000000.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User



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

kit-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 SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play.

All Permission Sets | Edit | Delete | Create New View

New	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48	49	50	51	52	53	54	55	56	57	58	59	60	61	62	63	64	65	66	67	68	69	70	71	72	73	74	75	76	77	78	79	80	81	82	83	84	85	86	87	88	89	90	91	92	93	94	95	96	97	98	99	100
<input type="checkbox"/>	Admin	Permission Set Label: Admin	Allows access to the store. Lets users see products and categories. Includes all RiverCat abilities, and allows access to manage carts and orders.	License: B2B Buyer Permission Set One Seat																																																																																																
<input type="checkbox"/>	Clone	Admin	Includes all RiverCat abilities, and allows access to manage carts and orders.	License: B2B Buyer Manager Permission Set One Seat																																																																																																
<input type="checkbox"/>	Clone	Admin	Includes all RiverCat abilities, and allows access to manage carts and orders.	License: CRM User																																																																																																
<input type="checkbox"/>	Clone	Admin	Includes all RiverCat abilities, and allows access to manage carts and orders.	License: Commerce Admin Permission Set License Seat																																																																																																
<input type="checkbox"/>	Clone	Admin	Includes all RiverCat abilities, and allows access to manage carts and orders.	License: Service Cloud Voice User																																																																																																
<input type="checkbox"/>	Clone	Admin	Includes all RiverCat abilities, and allows access to manage carts and orders.	License: Service Cloud Voice User																																																																																																
<input type="checkbox"/>	Clone	Admin	Includes all RiverCat abilities, and allows access to manage carts and orders.	License: Service Cloud Voice User																																																																																																
<input type="checkbox"/>	Clone	Admin	Includes all RiverCat abilities, and allows access to manage carts and orders.	License: Salesforce																																																																																																
<input type="checkbox"/>	Clone	Admin	Includes all RiverCat abilities, and allows access to manage carts and orders.	License: Field Manager																																																																																																
<input type="checkbox"/>	Clone	Admin	Includes all RiverCat abilities, and allows access to manage carts and orders.	License: Field Service Mobile																																																																																																
<input type="checkbox"/>	Clone	Admin	Includes all RiverCat abilities, and allows access to manage carts and orders.	License: Commerce Merchandiser User Permission Set License Seat																																																																																																
<input type="checkbox"/>	Clone	Admin	Includes all RiverCat abilities, and allows access to manage carts and orders.	License: Lightning Order Management User																																																																																																
<input type="checkbox"/>	Clone	Admin	Includes all RiverCat abilities, and allows access to manage carts and orders.	License: Lightning Order Management User																																																																																																

1-23 of 30 | 0 Selected | 44 (Previous) Next | Page 1 of 2

Permission Sets | Salesforce

kit-5e-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page-address=%2Fudd%2FPermissionSet%2FnewPermissionSetLapexp

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 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?

- Choose --None-- if you plan to assign this permission set to multiple users with different user and permission set licenses.

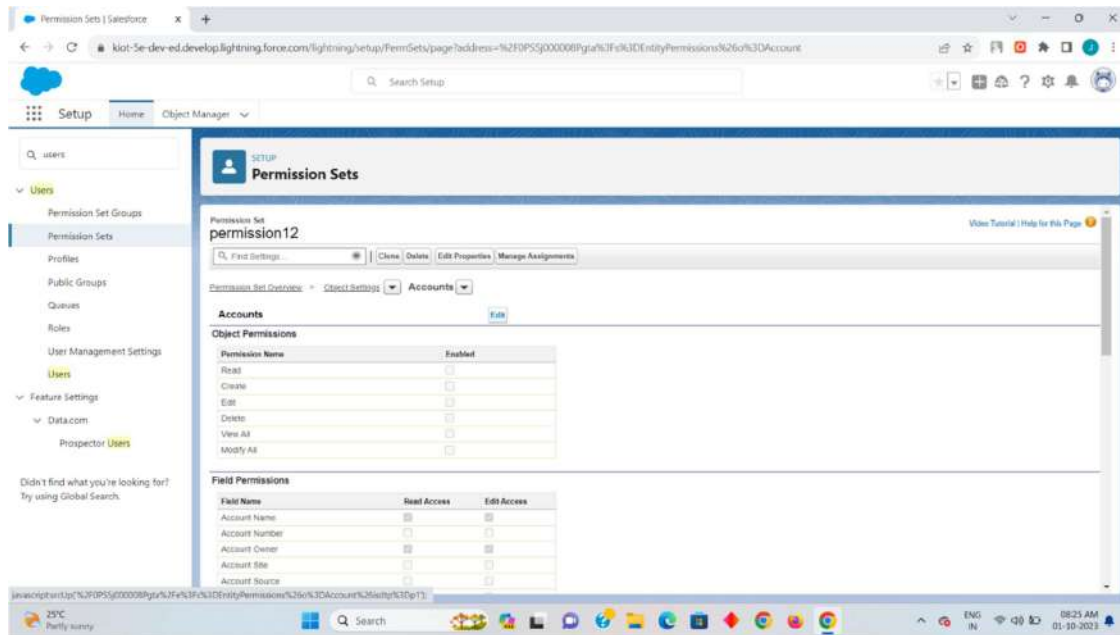
- Choose a specific user license if you want users with only one license type to use this permission set.

- Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.

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

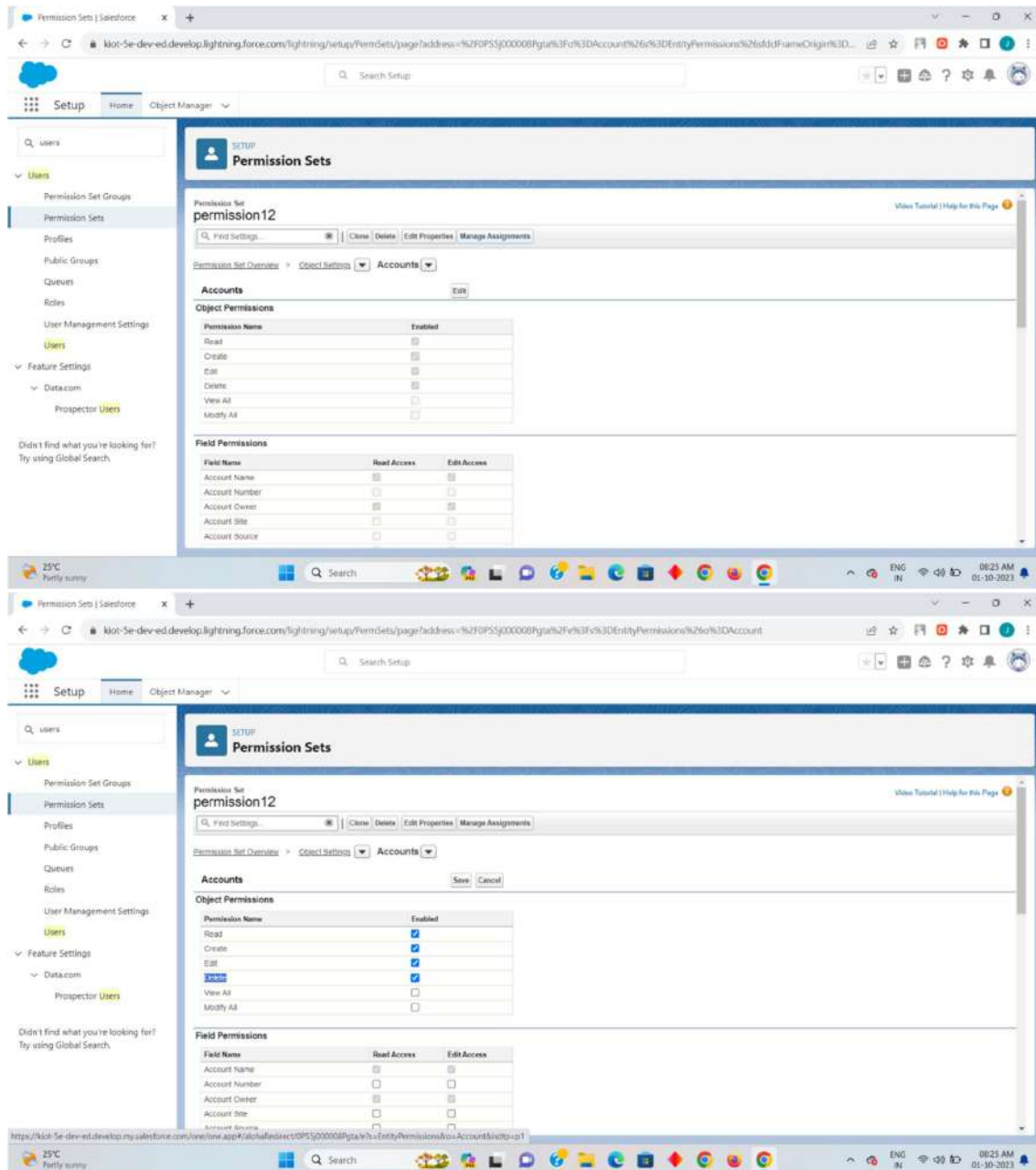
License: --None--

Save Cancel



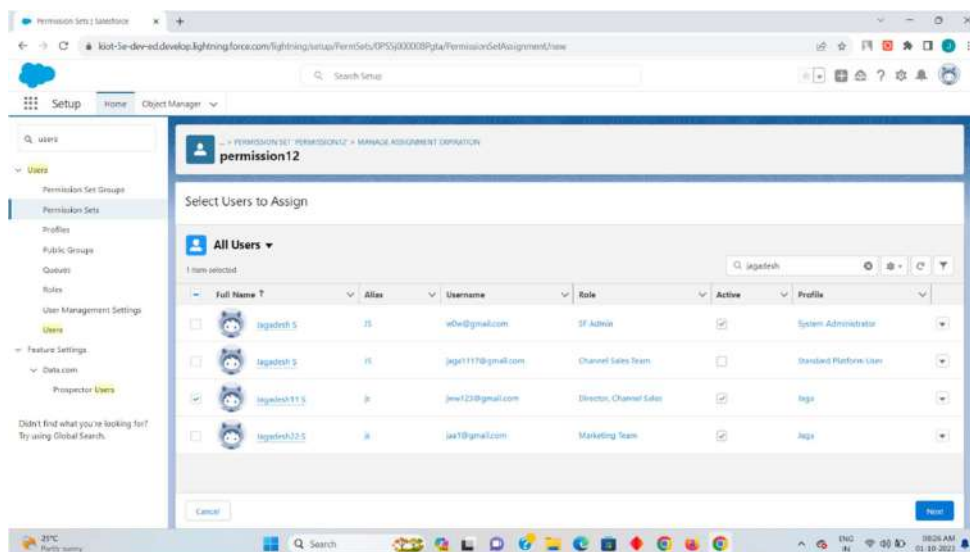
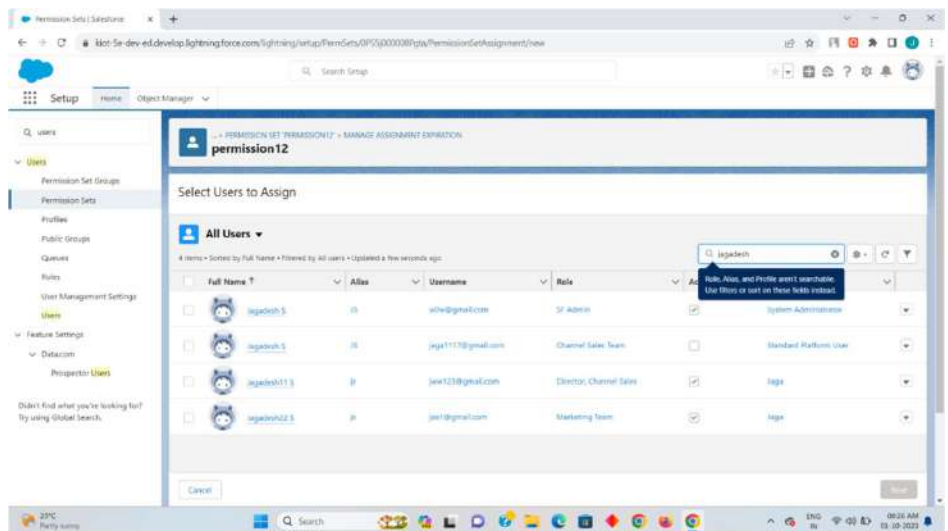
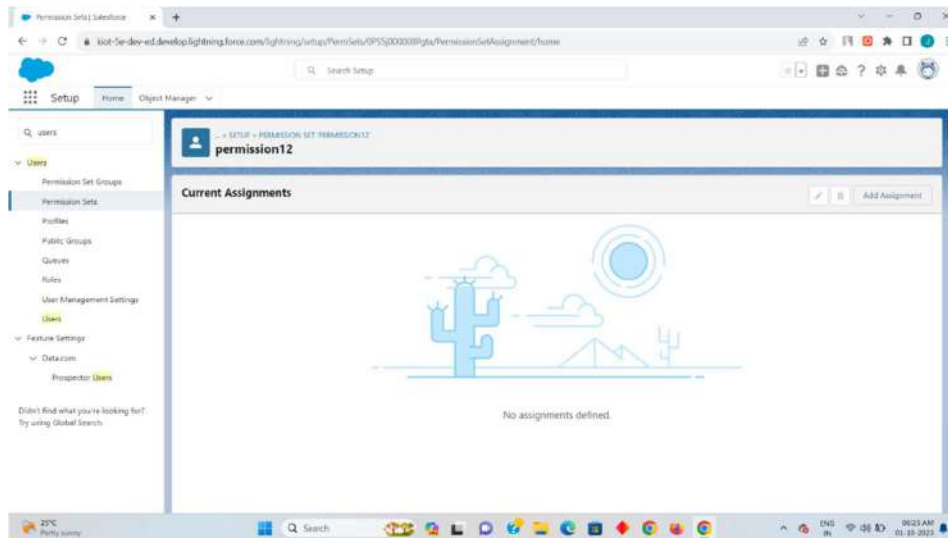
Step 7:

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.

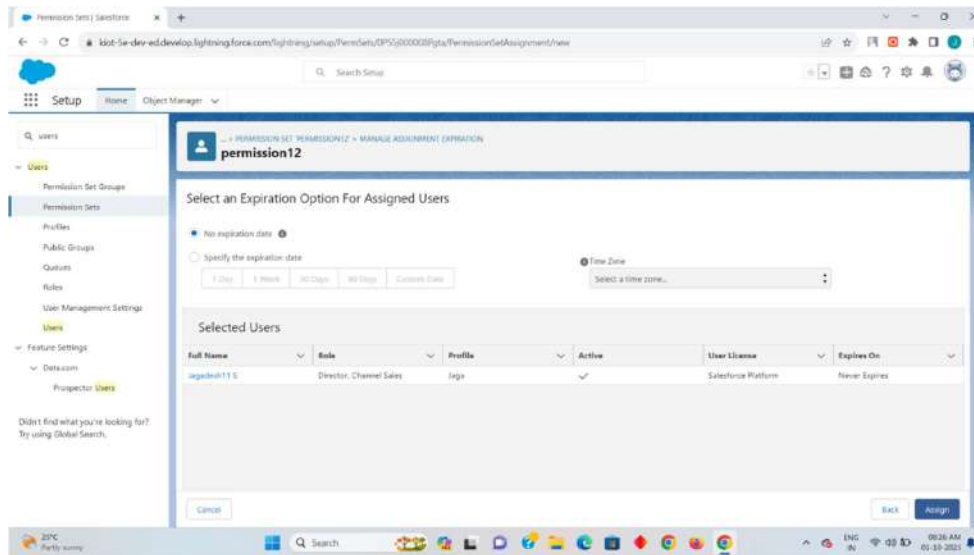


Step 8

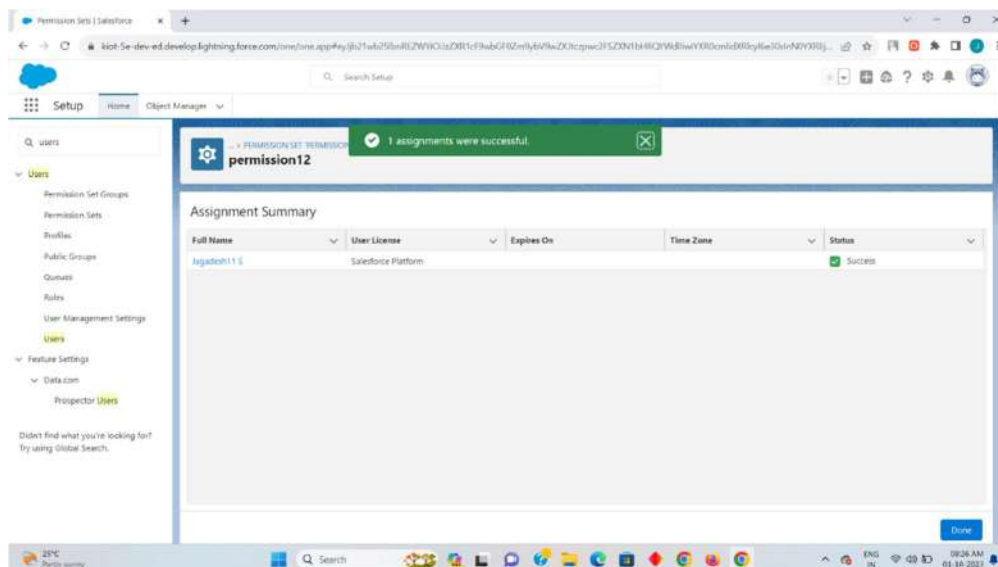
Now click on add assignment there you will find your two created users click on any one user to give a special access as delete on it and then click on assign so that the specific selected user can have a special access as delete on it.



Click on next.



Now click on Assign.



Now the specific access for the Jagadeh11 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**.

SETUP > OBJECT MANAGER

Survey Result

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Search Layouts for Salesforce Classic

Triggers

Validation Rules

Fields & Relationships

8 Items, Sorted by Name

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

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

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

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

Email Template

Thank You Email - Survey

Edit in Builder Edit Clone

Details

Related

Information

Email Template Name

Thank You Email - Survey

Description

Made in Email Template Builder

☒

Related Entity Type

Survey Result

Folder

Public Email Templates

Message Content

Subject

Thank You For Completing Our Survey!

Enhanced Letterhead

HTML Value

Hi {{{Survey_Result__c.Name__c}}},

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

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

Thanks,

Automation Champion

Additional Information

Created By

Rakesh Gupta, 12/21/2020, 4:23 PM

Last Modified By

Rakesh Gupta, 12/21/2020, 4:32 PM

Step 3: Create an Email Alert

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

Edit Email Alert
Survey - Thank You Email

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

Email Alert Edit Save Save & New Cancel

Edit Email Alert ⓘ = Required Information

Description Survey - Thank You Email

Unique Name Survey_Thank_You_Email ⓘ

Object Survey Result

Email Template Thank You Email - Survey ⓘ

Protected Component ☐

Recipient Type Search: User ⓘ for: ⓘ Find

Recipients

Available Recipients

User: Integration User
User: Rakesh Gupta
User: Security User

Selected Recipients

Email Field: Email

Add
Remove

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

Additional Emails

From Email Address Current User's email address ⓘ
☐ Make this address the default From email address for this object's email alerts. ⓘ

Save Save & New Cancel

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

1. Click **Setup**.

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

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

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

2. **Value: {!Comment}**

2. **Click Add Row**

3. **Row 2:**

1. **Field: Email__c**

2. **Value: {!Email.value}**

4. **Click Add Row**

5. **Row 3:**

1. **Field: Name__c**

2. **Value: {!Name.firstName}**
{!Name.lastName}

6. **Click Add Row**

7. **Row 3:**

1. **Field: Rating__c**

2. **Value: {!Rating}**

7. **Click Done.**

Edit Create Records

Create Salesforce records using values from the flow.

*Label: *API Name:

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:

Set Field Values for the Survey Result

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

☐ Manually assign variables

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

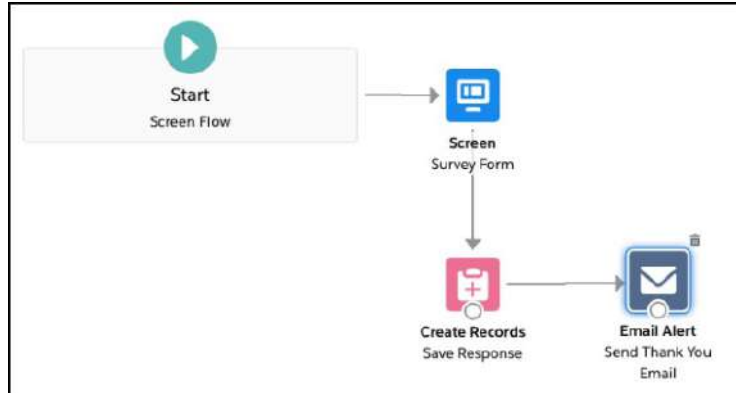
The next step is to call the **Survey – Thank You Email** email alert from flow so that when flow fires it triggers the thank you email to survey participants.

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

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

The screenshot shows a configuration window titled "Edit 'Survey - Thank You Email' email alert". It contains a description field, a "Label" field with the value "Send Thank You Email", an "API Name" field with the value "Send_Thank_You_Email", and a "Set Input Values" section with a "Record ID" field containing the expression "{!Save_Response}". At the bottom right are "Cancel" and "Done" buttons.

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

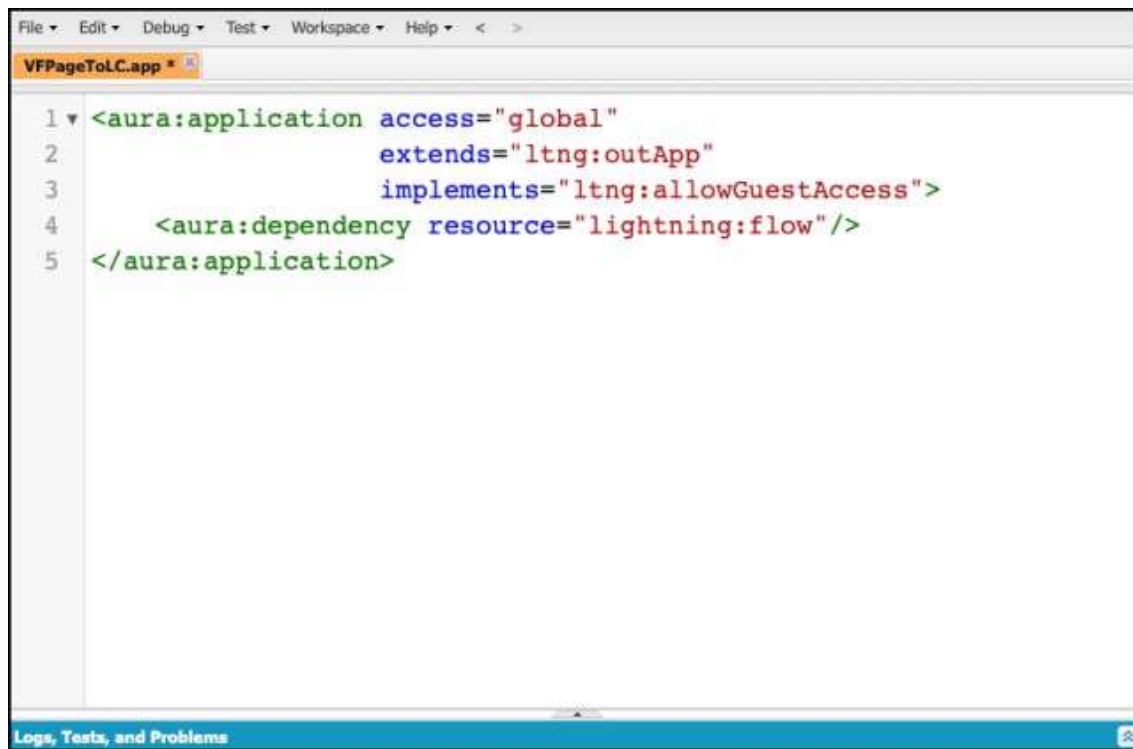
Cancel

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.



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

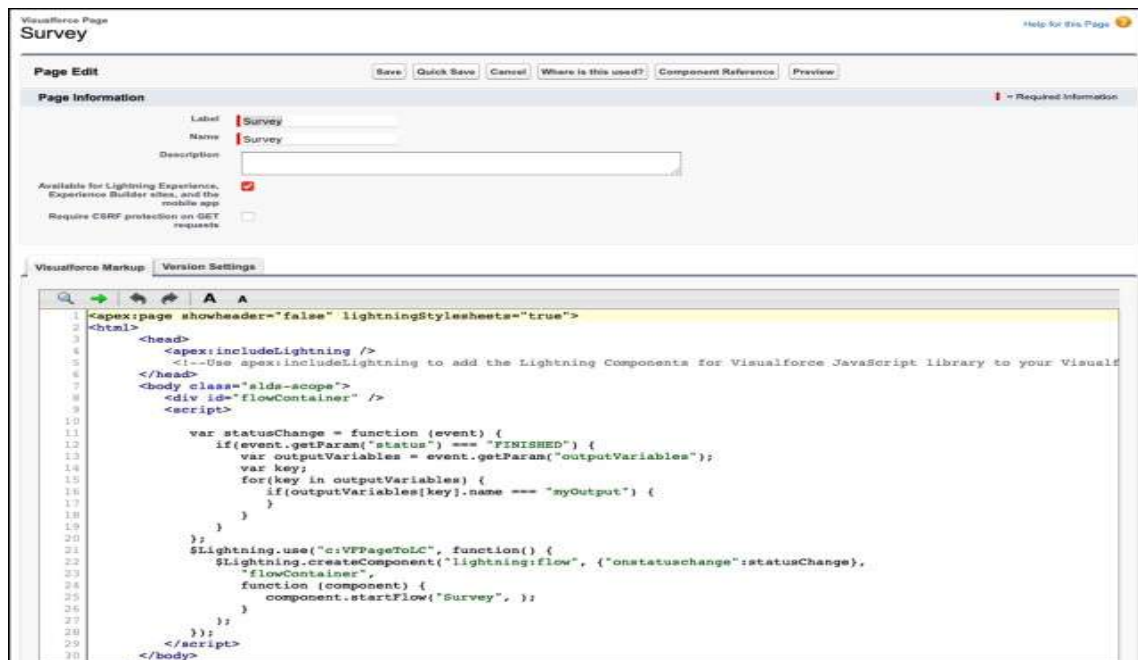
Step 6: Create a Visualforce Page and Embed Your Flow Into It

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**.



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

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

1. Click **Setup**.

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

Site Edit [Save] [Cancel]

Site Label: Survey [i]

Site Name: Survey [i]

Site Description: [Text Area]

Site Contact: Rakesh Gupta [i]

Default Record Owner: Rakesh Gupta [i]

Default Web Address: http://kathar-developer-edition.gus.force.com/survey [i]

Active: ☒ [i]

Active Site Home Page: Survey [Preview]

Inactive Site Home Page: InMaintenance [Preview]

Site Template: SiteTemplate [i]

Site Robots.txt: [Text Field]

Site Favorite Icon: [Image Field]

Analytics Tracking Code: [Text Field]

URL Rewriter Class: [Text Field]

Enable Feeds: ☐

Clickjack Protection Level: Allow framing by the same origin only (Recommended) [i]

Require Secure Connections (HTTPS): ☒ [i]

Lightning Features for Guest Users: ☒ [i]

Upgrade all requests to HTTPS: ☒ [i]

Enable Content Sniffing Protection: ☒ [i]

Enable Browser Cross Site Scripting Protection: ☒ [i]

Referrer URL Protection: ☒ [i]

Guest Access to the Payments API: ☐ [i]

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

Proof of Concept

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

