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Salesforce Developer(Course)  
Assignment no 1

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Year & Dep : 4<sup>th</sup> 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.

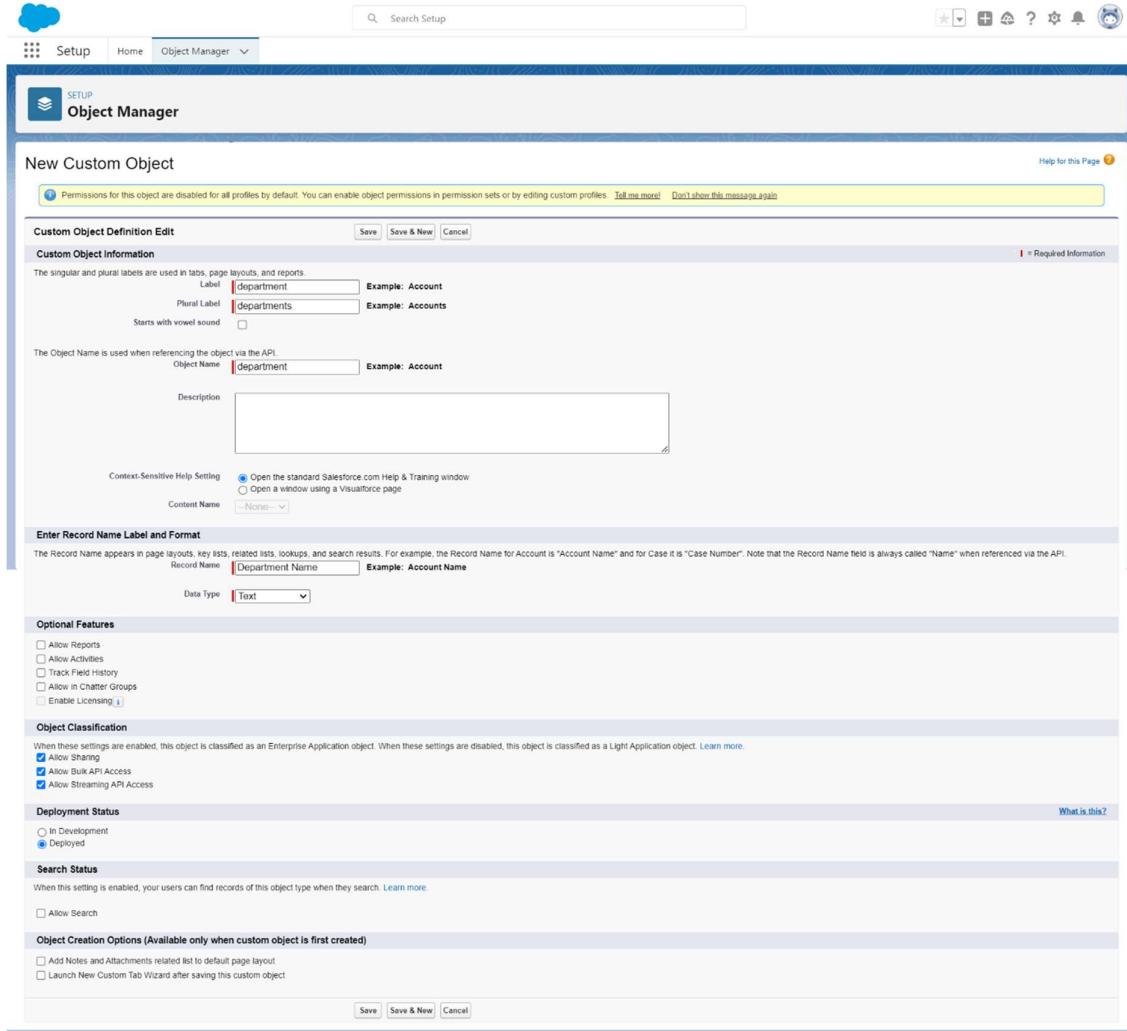
Solution:

## 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.

The screenshot shows the 'New Custom Object' page in the Salesforce Setup. The page title is 'New Custom Object'. It includes sections for 'Custom Object Definition Edit', 'Custom Object Information', 'Enter Record Name Label and Format', 'Optional Features', 'Object Classification', 'Deployment Status', 'Search Status', and 'Object Creation Options'. The 'Custom Object Information' section has fields for Label ('college'), Plural Label ('colleges'), and Description. The 'Enter Record Name Label and Format' section has fields for Record Name ('college Name') and Data Type ('Text'). The 'Optional Features' section has checkboxes for Allow Reports, Allow Activities, Track Field History, Allow in Chatter Groups, and Enable Licensing. The 'Object Classification' section has checkboxes for Allow Sharding, Allow Bulk API Access, and Allow Streaming API Access. The 'Deployment Status' section has checkboxes for In Development and Deployed. The 'Search Status' section has a checkbox for Allow Search. The 'Object Creation Options' section has 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, there are 'Save', 'Save & New', and 'Cancel' buttons.

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



## Step 2: Create a Master-Detail Relationship

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

1. Go to Setup > Object Manager.
2. Click on "College\_c" to open its settings.

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

Setup Home Object Manager

SETUP > OBJECT MANAGER  
**CDepartment**

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

Edit Delete

Setup Home Object Manager

SETUP > OBJECT MANAGER  
**CDepartment**

Details	New Relationship
Fields & Relationships	Step 3. Enter the label and name for the lookup field Step 3 of 6
Page Layouts	Field Label: college
Lightning Record Pages	Field Name: college
Buttons, Links, and Actions	Description:
Compact Layouts	Help Text:
Field Sets	Child Relationship Name: CDepartments
Object Limits	Sharing Setting: Select the minimum access level required on the Master record to create, edit, or delete related Detail records: <input checked="" type="radio"/> Read Only: Allows users with at least Read access to the Master record to create, edit, or delete related Detail records. <input type="radio"/> Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.
Record Types	Allow reparenting: <input type="checkbox"/> Child records can be reparented to other parent records after they are created
Related Lookup Filters	Auto add to custom report type: <input checked="" type="checkbox"/> Add this field to existing custom report types that contain this entry
Restriction Rules	
Scoping Rules	
Triggers	
Flow Triggers	
Validation Rules	Lookup Filter

The image contains two screenshots of the Salesforce Setup interface, both titled "CDepartment".

**Screenshot 1: New Relationship**

- Left Panel:** Shows the "Fields & Relationships" section of the Object Manager.
- Right Panel:** Step 2 of 6, titled "Choose the related object". It shows a dropdown menu set to "college".

**Screenshot 2: New Custom Field**

- Left Panel:** Shows the "Fields & Relationships" section of the Object Manager.
- Right Panel:** Step 1 of 6, titled "Choose the field type". It shows a list of data types:
  - None Selected**: A system-generated sequence number.
  - Auto Number**: A read-only field derived from a formula expression.
  - Formula**: A read-only field displaying the sum, minimum, or maximum value of a field in a related list.
  - Roll Up Summary**: A read-only field showing the count of all records in a related list.
  - Lookup Relationship**: A relationship field linking to another object.
  - Master-Detail Relationship**: A special type of parent-child relationship where the master record owns the detail records. This is the selected option.
  - External Lookup Relationship**: A relationship to an external object.

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

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

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

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

The screenshot shows the Salesforce Object Manager interface for the 'CDepartment' object. The 'Fields & Relationships' section is active, displaying four items sorted by field label. The table includes columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED.

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

Cloud icon

Setup Home Object Manager

Search bar: Search Setup

User Interface: Rename Tabs and Labels

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.

Help for this Page

Custom Object Tabs

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

Web Tabs

No Web Tabs have been defined.

Visualforce Tabs

No Visualforce Tabs have been defined.

Lightning Component Tabs

No Lightning component tabs have been defined.

Lightning Page Tabs

No Lightning Page Tabs have been defined.

Cloud icon

Setup Home Object Manager

college

SETUP > OBJECT MANAGER 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

New Custom Field

Help for this Page

Step 5 of 5

Step 5. Add to page layouts

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 Name  college Layout

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

Previous Save & New Save Cancel

**New Custom Field**

**Step 4. Establish field-level security**

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

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

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

Help for this Page

**New Custom Field**

**Step 3. Define the summary calculation**

Select Object to Summarize  
Master Object: college  
Summarized Object: CDepartments

Select Roll-up Type  
COUNT (radio button selected)  
SUM  
MIN  
MAX  
Field to Aggregate: None

Filter Criteria  
All records should be included in the calculation (radio button selected)  
Only records meeting certain criteria should be included in the calculation

Help for this Page

The screenshot shows the second step of a five-step wizard for creating a new custom field. The title is "New Custom Field". The sub-step is "Step 2. Enter the details". The "Field Label" is set to "Total count" and the "Field Name" is "Total\_count". There is a checkbox "Auto add to custom report type" which is checked. A note says "Add this field to existing custom report types that contain this entity". Navigation buttons at the top right include "Previous", "Next", and "Cancel".

The screenshot shows the first step of a five-step wizard for creating a new custom field. The title is "New Custom Field". The sub-step is "Step 1. Choose the field type". It asks to "Specify the type of information that the custom field will contain". The "Data Type" section shows various options: "None Selected" (selected), "Auto Number", "Formula", "Roll Up Summary" (selected), "Lookup Relationship", "Master-Detail Relationship", and "External Lookup Relationship". Each option has a detailed description below it. Navigation buttons at the top right include "Next" and "Cancel".

The screenshot shows the Salesforce Object Manager interface. At the top, there's a navigation bar with icons for Setup, Home, and Object Manager. A search bar contains the text 'college'. On the right side of the header are various global navigation links. Below the header, the main content area has a title 'SETUP > OBJECT MANAGER college'. On the left, a sidebar lists several configuration options under 'Fields & Relationships': Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, Scoping Rules, Triggers, Flow Triggers, and Validation Rules. The main panel is titled 'Fields & Relationships' and shows a table with four items. The table has columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The data is as follows:

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

## Step 4: Create a Lightning App

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

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

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

The screenshot shows the Salesforce Setup interface with the 'Tabs' tab selected under 'User Interface'. The main content area is titled 'New Custom Object Tab' and 'Step 2. Add to Profiles'. It displays a list of user profiles on the left and their corresponding 'Tab Visibility' settings on the right. Most profiles have 'Default On' selected. A note at the top states: 'Choose the user profiles for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each profile.' Buttons at the bottom include 'Previous', 'Next', and 'Cancel'.

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

Setup Home Object Manager

tabs

User Interface

Rename Tabs and Labels

**Tabs**

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

SETUP Tabs

### New Custom Object Tab

Step 1. Enter the Details Step 1 of 3

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

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

Object: college

Tab Style: Jewel

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.  
Splash Page Custom Link: None

Description:

Next Cancel

This screenshot shows the initial step of creating a new custom object tab. The user has selected the 'college' object and chosen the 'Jewel' tab style. There is a note at the top right for creating a new custom object.

Setup Home Object Manager

tabs

User Interface

Rename Tabs and Labels

**Tabs**

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

SETUP Tabs

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

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

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

Append tab to users' existing personal customizations

Previous Save Cancel

This screenshot shows the final step of adding the new tab to custom apps. Most checkboxes for including the tab in various apps are checked.

**New Custom Object Tab**

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

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

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

Object: CDDepartment

Tab Style: Lightning

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

Splash Page Custom Link: None

Description:

**Next** **Cancel**

**Lightning Experience App Manager**

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

App Name ↑	Developer Name	Description	Last Modified Date	App ...	Visi...
1 All Tabs	AllTabSet	Build CRM Analytics dashboards and apps	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	✓

**Setup**   **Home**   **Object Manager**

**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**

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

**Web Tabs**

No Web Tabs have been defined.

**Visualforce Tabs**

No Visualforce Tabs have been defined.

**Lightning Component Tabs**

No Lightning component tabs have been defined.

**Lightning Page Tabs**

No Lightning Page Tabs have been defined.

**New Lightning App**

**App Details & Branding**

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

**App Details**

- \*App Name: My college
- \*Developer Name: My\_college
- Description: Enter a description...

**App Branding**

- Image:
- Primary Color Hex Value: #217AC7
- Org Theme Options:  Use the app's image and color instead of the org's custom theme

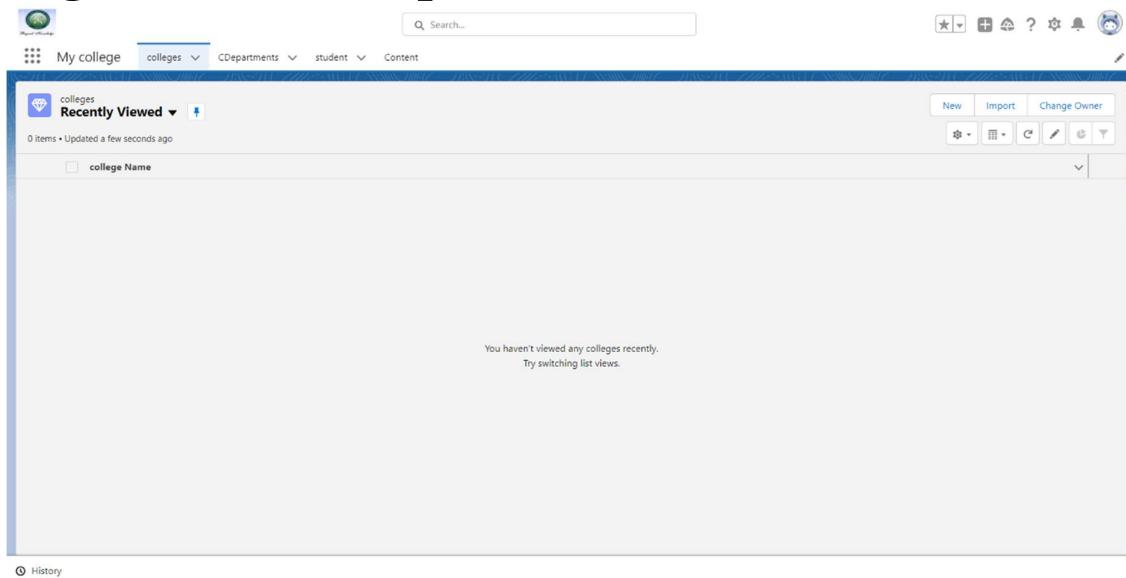
Next

Salesforce Offline   14 Sales   LightningSales   Manage your sales process with accounts, leads, opportunities, and more   14/07/2023, 10:47 am   Lightning

## **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-dev-ed.develop.lightning.force.com/lightning/o/college\_\_c/new?count=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

Owner krishna s

\*college Name kiot

phone 9087116402

Email kiot@ac.in

Location

Latitude 90

Longitude 80

Cancel Save & New Save

History

app-d-dev-ed.develop.lightning.force.com/lightning/o/CDepartment\_\_c/new?count=1&nooverride=1&useRecordTypeCheck=1&navigationLocation=LIST\_VIEW&uid=16961390...

My college colleges CDdepartments student Content

CDepartments Recently Viewed ▾

1 item • Updated a few seconds ago

Department Name

1 cse

New Import

Save & New Save

History

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

Finish update

My college colleges CDepartment

To unpin, pin another list view

CDepartments Recently Viewed

1 item • Updated a minute ago

Department Name cse

New CDepartment

Information

\*Department Name information technology

\*college kiot

email it@gmail.com

phone 897577568

hod name arul

about

New Import

Cancel Save & New Save

History

My college colleges CDdepartments student Content

CDepartment information technology

New Contact Edit New Opportunity

Related Details

Department Name  
information technology

college  
kiot

email  
it@gmail.com

phone  
897577568

hod name  
arul

about

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

History

My college colleges CDdepartments student Content

college kiot

New Contact Edit New Opportunity

Related Details

college Name  
kiot

Total count  
1

phone  
9087116402

Email  
kion@gmail.com

Location  
90.80

Owner krishna s

Created By krishna s, 01/10/2023, 11:16 am Last Modified By krishna s, 01/10/2023, 11:17 am

History

My college colleges CDdepartments student Content

CDepartments Recently Viewed

1 item • Updated a few seconds ago

New Import

Department Name

cse

The screenshot displays two views of a CRM application interface.

**Top View (Recently Viewed):**

- Header: My college, colleges, CDepartments, student, Content.
- Search bar: Search...
- Toolbar: New, Import, Change Owner, etc.
- Section: Recently Viewed (1 item updated a few seconds ago)
- Table: College Name (kiot)

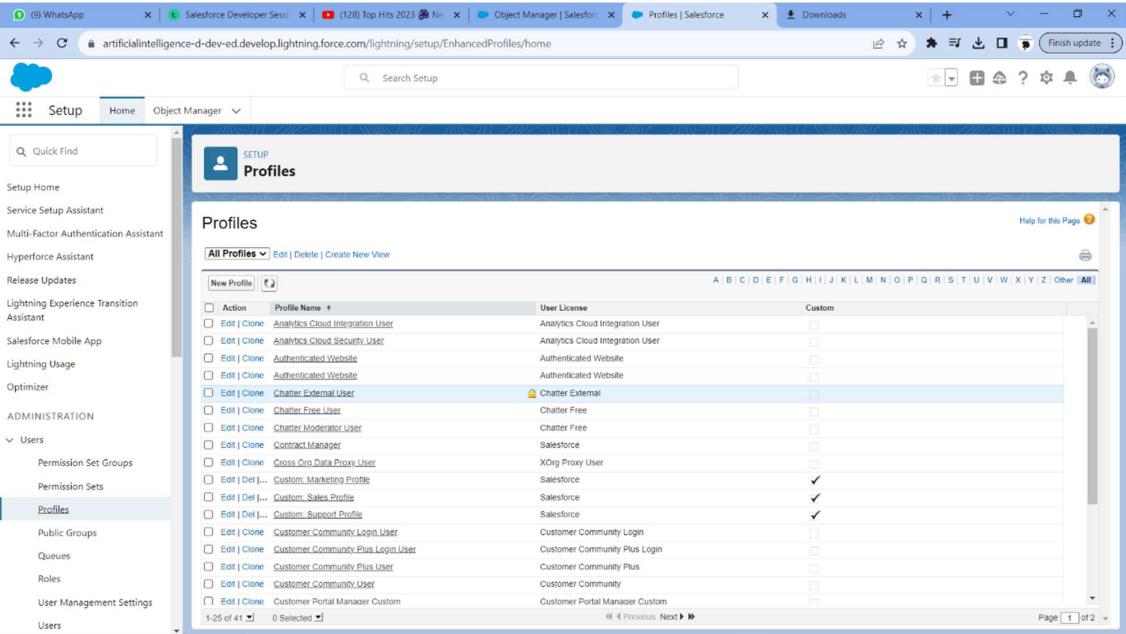
**Bottom View (College Record):**

- Header: My college, colleges, CDepartments, student, Content.
- Search bar: Search...
- Toolbar: New Contact, Edit, New Opportunity.
- Section: kiot (Details tab selected)
- Form fields:
  - Related: college Name (kiot)
  - Owner: krishna s
  - Total count: 2
  - phone: 9087116402
  - Email: kiot@gmail.com
  - Location: 90.80
  - Created By: krishna s, 01/10/2023, 11:16 am
  - Last Modified By: krishna s, 01/10/2023, 11:19 am

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

Solution:

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



The screenshot shows the Salesforce Setup interface with the 'Profiles' page open. The left sidebar is collapsed, and the main area displays a table of profiles. The table has columns for 'Action', 'Profile Name', 'User License', and 'Custom'. The 'User License' column includes options like 'Analytics Cloud Integration User', 'Authenticated Website', 'Chatter External', 'Chatter Free', 'Contract Manager', 'Salesforce', 'XOrg Proxy User', and 'Customer Community Login User'. The 'Custom' column contains checkboxes, many of which are checked for certain profiles. The table is paginated at the bottom with 'Page 1 of 2'.

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

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

**Profiles**

All Profiles | Edit | Delete | Create New View

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit   Clone	Salesforce API Only System Integrations	Salesforce Integration	<input type="checkbox"/>
<input type="checkbox"/> Edit   Del   ...	salesmanager001	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"/>

Help for this Page

New Profile

1-7 of 7 | 0 Selected | Page 1 of 1

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

**Clone Profile**

Enter the name of the new profile

You must select an existing profile to clone from.

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

Save | Cancel

javascript:srcUp(%27%2fui%2fperms%2fprofile%2fprofileClone%2fe%3Fid%3D00e5j000003uvKu%26setupid%3DEnhancedProfiles%26refURL%3D%252f00e%253Ffc%253D0085j00000Oc7U%2526rolodexIndex%253D18%2526page%253D1%2526sortP%253Dp1%26sortP%

Salesforce Developer Session | Object Manager | Profiles | Salesforce

**Clone Profile**

Enter the name of the new profile.

You must select an existing profile to clone from.

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

**Save** **Cancel**

**Profile Manager**

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

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

**Profile Detail**

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

**Page Layouts**

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

Salesforce Developer Session | Object Manager | Profiles | Salesforce

Setup Home Object Manager

Manager

Set the permissions and page layouts for this profile.

**Profile Edit**

Custom App Settings		Service Provider Access	
Name	User License	Platform	WDC
Manager	Salesforce Platform	Analytics Studio (standard__Insights)	Platform (standard__Platform)
		App Launcher (standard__AppLauncher)	WDC (standard__Work)
		slot (slot)	

**Tab Settings**

Standard Tab Settings

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

**Communication Subscription Channel Types**

Individuals	Locations
Checkmarks	None

**Communication Subscription Consents**

Party Consents	Push Topics
Checkmarks	Checkmarks

**Communication Subscription Timings**

Streaming Channels	User External Credentials
Checkmarks	None

**Contacts**

Bank	customers	Enhancement Requests
None	None	None

**Contact Point Addresses**

Bank	customers	Enhancement Requests
None	None	None

**Contact Point Consents**

Bank	customers	Enhancement Requests
None	None	None

**Contact Point Emails**

Bank	customers	Enhancement Requests
None	None	None

**Custom Object Permissions**

Bank	customers	Enhancement Requests
None	None	None

**Session Settings**

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

**Password Policies**

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

Salesforce Developer Session | Object Manager | Profiles | Salesforce

artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j00000WQBz%2Fe%3FretURL%3D%252F00e5j0...

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

### SETUP Profiles

**Custom Object Permissions**

	Contact Point Addresses	Contact Point Consents	Contact Point Emails	Streaming Channels	User External Credentials
Contact Point Addresses	<input checked="" type="checkbox"/>				
Contact Point Consents	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contact Point Emails	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sellers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Streaming Channels	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
User External Credentials	<input type="checkbox"/>				

**Session Settings**

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

**Password Policies**

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

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

### SETUP Profiles

**Custom Object Permissions**

	Bank	customers	Enhancement Requests
Basic Access	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Create	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Edit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Delete	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Data Administration	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
View All	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Modify All	<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
- Password question requirement: Cannot contain password
- Maximum invalid login attempts: 10
- Lockout effective period: 15 minutes
- Obscure secret answer for password resets
- Require a minimum 1 day password lifetime
- Don't immediately expire links in forgot password emails

**Profiles**

**Custom Object Permissions**

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

**Session Settings**

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

**Password Policies**

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

**Users**

**All Users**

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

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

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

Action	Full Name	Alias	Username	Role	Active	Profile
<a href="#">Edit</a>   <a href="#">Login</a>	Ananya_Diva	dadan	test_diva_pas_4w8bybz9wtk_tzqrgstbkxxo_3o8bf0zywms_h12tazwfmea@gmail.com		<input checked="" type="checkbox"/>	UAMS User
<a href="#">Edit</a>	Charter_Export	Charter	charth_0015000000cakkeab.lo0tldvmp0jka@charter.salesforce.com		<input checked="" type="checkbox"/>	Charter Free User
<a href="#">Edit</a>   <a href="#">Login</a>	Ellington_Amelia	aelli	amelia.ellington.1.46kxcg00lnh0cyedcup4vh.hnb0avymvtho.wguctor1dah@gmail.com		<input checked="" type="checkbox"/>	Standard Platform User
<a href="#">Edit</a>	S_GOPAL	GS	k0520@gmail.com		<input checked="" type="checkbox"/>	System Administrator
<a href="#">Edit</a>	User_Integration	integ	integration@00d5000000csakean.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<a href="#">Edit</a>	User_Security	sec	insightssecurity@00d5000000csakean.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

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

Setup Home Object Manager

Hyperforce Assistant Release Updates Lightning Experience Transition Assistant Salesforce Mobile App Lightning Usage Optimizer ADMINISTRATION > Users > Data > Email PLATFORM TOOLS > Apps > Feature Catalog

SETUP Users

### New User

User Edit Save Save & New Cancel

General Information

First Name	sowmya
Last Name	bella
Alias	sbal8
Email	2k20ce179@kiot.ac.in
Username	2k21it@kiot.ac.in
Nickname	User169616771282564526
Title	worker
Company	kiot bank
Department	
Division	

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

Help for this Page

Search Setup

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

Setup Home Object Manager

Hyperforce Assistant Release Updates Lightning Experience Transition Assistant Salesforce Mobile App Lightning Usage Optimizer ADMINISTRATION > Users > Data > Email PLATFORM TOOLS > Apps > Feature Catalog

SETUP Users

### New User

User Edit Save Save & New Cancel

General Information

First Name	sowmya
Last Name	bella
Alias	sbal8
Email	2k20ce179@kiot.ac.in
Username	2k21it@kiot.ac.in
Nickname	User169616771282564526
Title	worker
Company	kiot bank
Department	
Division	

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

Help for this Page

Search Setup

Screenshot of the Salesforce Developer Session showing the User Management page for a user named "sowmyi bala".

**User Detail:**

- Name: sowmyi bala
- Alias: bala
- Email: 2k20ce179@kiot.ac.in (Verify) [i]
- Username: 2k21it@kiot.ac.in
- Nickname: User16961677128256452616 [i]
- Title: worker
- Company: kiot bank
- Department:
- Division:
- Address:
- Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata)
- Locale: English (India)
- Language: English
- Delegated Approver:
- Manager:
- Receive Approval Request Emails: Only if I am an approver
- Federation ID:
- App Registration: One-Time Password Authenticator [i]
- App Registration: Salesforce Authenticator [i]
- Role: Salesforce Platform Manager
- User License Profile: Manager
- Active: ✓
- Marketing User: [checkbox]
- Offline User: [checkbox]
- Knowledge User: [checkbox]
- Flow User: [checkbox]
- Service Cloud User: [checkbox]
- Site.com Contributor User: [checkbox]
- Site.com Publisher User: [checkbox]
- WDC User: [checkbox]
- Mobile Push Registrations: [checkbox] View [i]
- Data.com User Type: [checkbox]
- Accessibility Mode (Classic Only): [checkbox] [i]
- Debug Mode: [checkbox] [i]
- High-Contrast Palette on Charts: [checkbox] [i]
- Load Lightning Pages While Scrolling: ✓ [i]
- Salesforce CRM Content User: ✓

**Gmail inbox:**

- Inbox: 5,318
- Starred: 0
- Snoozed: 0
- Sent: 0
- Drafts: 5
- More: 0

**Welcome to Salesforce!**

Click below to verify your account.

Verify Account

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

Username:  
2k21it@kiot.ac.in

Again, welcome to Salesforce!

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Salesforce Change Your Password

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

- 8 characters
- 1 letter
- 1 number

\* New Password  
..... Good

\* Confirm New Password  
..... Match

Security Question  
In what city were you born?

\* Answer  
salem

Change Password

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

Login | Salesforce

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

WATCH ON DEMAND

AIDay

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Recently Viewed | Bank | Salesfo... +

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

Search...

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

DISPLAY DENSITY  
Comfy (selected)  
Compact

OPTIONS  
Switch to Salesforce Classic ⓘ  
Add Username

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

New Bank | Salesforce

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

Search...

New Change Owner

Bank Name

New Bank

\* = Required Information

Information

Bank Name: boi

Owner: sowmiya bala

phoneno: 0897754534

Cancel Save & New Save

The image consists of two vertically stacked screenshots of the Salesforce Lightning Experience.

**Screenshot 1: New customer creation**

This screenshot shows the "New customer" creation screen. The "Information" section contains two required fields: "customer Name" (set to "madhu") and "Bank" (set to "boi"). The "Save" button is highlighted in blue.

**Screenshot 2: Customer detail view**

This screenshot shows the detail view for the newly created customer "madhu". The "Details" tab is selected. The customer's name is listed as "madhu", and the bank is listed as "boi". The "Created By" field shows "sowmiya bala" on 01/10/2023, 7:17 pm, and the "Last Modified By" field also shows "sowmiya bala" on the same date and time. A green success message at the top states "customer 'madhu' was created."

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

**Profiles**

All Profiles | Edit | Delete | Create New View

Action Profile Name User License Custom

<input type="checkbox"/>	Profile Name	Salesforce Integration	<input checked="" type="checkbox"/>
<input type="checkbox"/>	salesmanager001	Salesforce	<input type="checkbox"/>
<input type="checkbox"/>	Silver Partner User	Silver Partner	<input type="checkbox"/>
<input type="checkbox"/>	Solution Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/>	Standard Platform User	Salesforce Platform	<input type="checkbox"/>
<input type="checkbox"/>	Standard User	Salesforce	<input type="checkbox"/>
<input type="checkbox"/>	System Administrator	Salesforce	<input type="checkbox"/>

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

1.7 of 7 0 Selected 4 Previous Next Page 1 of 1

javascript:srcUp(%27%2fui%2fperms%2fu%2fprofile%2fProfileClone%2f%3Fid%3D00e5j00003uvKu%26setupid%3DEnhancedProfiles%26retURL%3D%252f00%253Fk%253D0085j00000Oc7U%2526rolodexIndex%253D1%2526dtp%253Dp1%26adtp...

**Clone Profile**

Enter the name of the new profile.

You must select an existing profile to clone from.

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

Save Cancel

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

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

- Setup Home**: The current page is "Profiles".
- Service Setup Assistant**, **Multi-Factor Authentication Assistant**, **Hyperforce Assistant**, **Release Updates**, **Lightning Experience Transition Assistant**, and **Salesforce Mobile App** are listed under "Setup Home".
- Lightning Usage Optimizer** is listed under "ADMINISTRATION".
- Users** is expanded, showing:
  - Permission Set Groups**
  - Permission Sets**
  - Profiles**: This is the active tab, showing the "salesmanage" profile details. The profile has a Name of "salesmanage", a User License of "Salesforce Platform", and a Description of "Created By GOPALS\_S 01/10/2023, 7:19 pm". It is assigned to the "Custom Profile" checkbox. The "Modified By" field also shows "GOPALS\_S 01/10/2023, 7:19 pm".
  - Standard Object Layouts**: Displays layouts for Global, Email Application, Home Page Layout, Account, Alternative Payment Method, Appointment Invitation, and Asset objects.
  - Page Layouts**: Displays layouts for Global, Operating Hours, Order, Order Product, Payment, Payment Authorization, Payment Authorization Adjustment, and Payment Gateway objects.
- Queues**, **Roles**, **User Management Settings**, and **Users** are listed under "Users".

The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected. The main content area displays the 'Profile Edit' screen for the 'salesmanage' profile. The profile name is 'salesmanage'. The 'User License' is set to 'Salesforce Platform' and the 'Custom Profile' checkbox is checked. In the 'Custom App Settings' section, 'Analytics Studio (standard\_Insights)' and 'App Launcher (standard\_AppLauncher)' are listed with their visibility and default settings. Under 'Service Provider Access', there is a 'Tab Settings' section with an unchecked checkbox for 'Override users' personal tab customizations'. At the bottom, there is a 'Standard Tab Settings' section with tabs for Home, Default On, Accounts, Contacts, Leads, Opportunities, and Learning, all of which have their 'Default On' checkboxes checked.

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

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

Custom Object Permissions

	Basic Access					Data Administration						
	Read	Create	Edit	Delete	View All	Modify All	Read	Create	Edit	Delete	View All	Modify All
Contact Point Emails	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>							
User External Credentials	<input type="checkbox"/>	<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"/>
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
Obfuscate secret answer for password reset:	<input type="checkbox"/>
Require a minimum 1 day password lifetime:	<input type="checkbox"/>
Don't immediately expire links in forgot password emails:	<input type="checkbox"/>

Custom Object Permissions

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

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

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

Save | Save & New | Cancel

Salesforce Developer Session 2 | Top Hits 2023 | New Post | Users | Salesforce | Welcome to Salesforce: Verify...

Setup Home Object Manager

Search Setup

Users

New User

User Edit Save Save & New Cancel

General Information

First Name [ ] Last Name [ ] Role <None Specified>

Alias [ ] User License Salesforce Integration

Email [ ] Profile Salesforce API Only System Integrations

Username [ ] Active ✓

Nickname [ ] Marketing User

Title [ ] Offline User

Company [ ] Knowledge User

Department [ ] Flow User

Division [ ] Service Cloud User

Data.com User Type None Data.com Monthly Addition Limit Default Limit (300)

Accessibility Mode (Classic Only) High-Contrast Palette on Charts

Load Lightning Pages While Scrolling Debug Mode

Help for this Page

Setup Home Object Manager

Search Setup

Users

New User

User Edit Save Save & New Cancel

General Information

First Name madhu Last Name b Role <None Specified>

Alias mb User License Salesforce Platform

Email 2k20cse179@kiot.ac.in Profile Salesmanage

Username 2k20cst@kiot.ac.in Active ✓

Nickname User 169616842428654192 Marketing User

Title worker Offline User

Company kiot bank Knowledge User

Department Sales Flow User

Division Service Cloud User

Data.com User Type None Site.com Contributor User

Accessibility Mode (Classic Only) Site.com Publisher User

Load Lightning Pages While Scrolling Debug Mode

Help for this Page

Salesforce Developer Session 2 | Top Hits 2023 | New Post | Users | Salesforce | Welcome to Salesforce: Verify...

Setup Home Object Manager

Search Setup

Cloud icon

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

Cloud icon

Users

Mailing Address

Street: 4/194, ariyampalayam, unhamaslapuram...

City: SALEM

Zip/Postal Code: 636308

State/Province: TAMIL NADU

Country: [ ]

Single Sign On information

Federation ID: [ ]

Locale Settings

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

Locale: English (India)

Language: English

Approver Settings

Delegated Approver: [ ]

Manager: [ ]

Receive Approval Request Emails: Only if I am an approver

Generate new password and notify user immediately

Save Save & New Cancel

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

Setup Home Object Manager

Search Setup

User madhu b

User Detail

Name: madhu b	Role: Salesforce Platform
Alias: mb	User License Profile: salesmanager
Email: 2k20csit179@kiot.ac.in [Verify]	Active: <input checked="" type="checkbox"/>
Username: 2k20csit@kiot.ac.in	Marketing User: <input type="checkbox"/>
Nickname: User1695168424265419206	Offline User: <input type="checkbox"/>
Title: worker	Knowledge User: <input type="checkbox"/>
Company: kiot bank	Flow User: <input type="checkbox"/>
Department: Sales	Service Cloud User: <input type="checkbox"/>
Division:	Site.com Contributor User: <input type="checkbox"/>
Address: 4194, amampayam, uthamaslapuram.., Paraikadu, salem- 636308 SALEM 636308 TAMIL NADU	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"/> View
Language: English	Data.com User Type: <input type="checkbox"/>
Delegated Approver: Manager	Accessibility Mode (Classic Only): <input type="checkbox"/> <input type="checkbox"/>
Receive Approval Request Emails: Only if I am an approver	Debug Mode: <input type="checkbox"/> <input type="checkbox"/>
Federation ID:	High-Contrast Palette on Charts: <input type="checkbox"/> <input type="checkbox"/>
App Registration: One-Time Password Authenticator	Load Lightning Pages While Scrolling: <input checked="" type="checkbox"/> <input type="checkbox"/>

KNOWLEDGE CENTER OF SCHOOLS

Compose

Inbox 5,318

Starred

Snoozed

Sent

Drafts 5

More

Labels +

Welcome to Salesforce!

Click below to verify your account.

Verify Account

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

Username:  
2k20csit@kiot.ac.in

Again, welcome to Salesforce!

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Salesforce.com, inc. The Landmark at One Market, Suite 300, San Francisco, CA, 94105, United States

Reply Forward

**Change Your Password | Salesforce**

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

**salesforce**

### Change Your Password

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

- 8 characters
- 1 letter
- 1 number

\* New Password  
..... Good

\* Confirm New Password  
..... Match

Security Question  
In what city were you born?

\* Answer  
india

Change Password

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

---

**Recently Viewed | Bank | Salesforce**

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

kiot Bank customers Home

Search...

**Recently Viewed**

Bank Recently Viewed

0 items • Updated a few seconds ago

New

Bank Name

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

List View

Recently Viewed | customers | S +

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

kiot Bank customers Home

Search... Incognito (3) Finish update

**Recently Viewed** (1)

0 items • Updated a few seconds ago

customer Name

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

List View

(9) WhatsApp | Salesforce Developer Session | Top Hits 2023 | No | Permission Sets | Salesforce | Welcome to Salesforce! | Reset Password | Salesforce | Finish update

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

Setup Home Object Manager

Search Setup

**Permission Sets**

Help for this Page

Permission Sets

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

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

All Permission Sets | Edit | Delete | Create New View

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

1-25 of 29 0 Selected

Page 1 of 2

<https://artificialintelligence-d-dev-ed.lightning.force.com/one/app4/1/setup/PermSets/home>

Step 2:

Permission Sets:

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

Object-Level Security:

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

Record-Level Security:

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

Ownership:

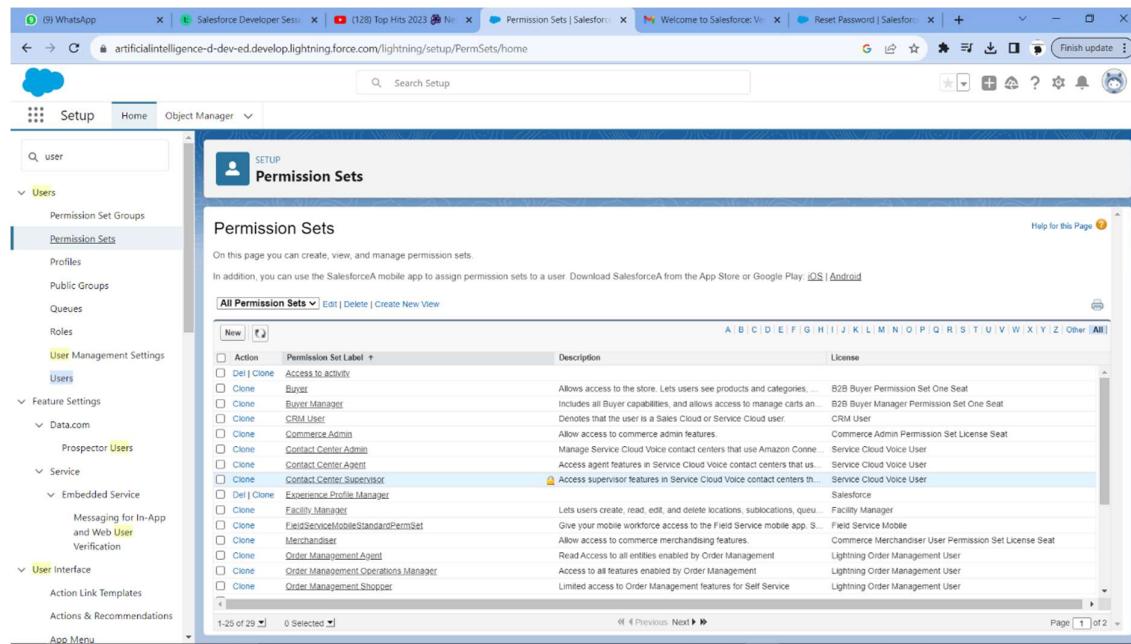
- Ensure that the Account records are owned by the respective users, with User A owning their records and User B owning their records.

## Organization-Wide Defaults:

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

## Testing:

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



The screenshot shows the Salesforce Setup interface for managing Permission Sets. The left sidebar navigation includes 'Setup', 'Home', and 'Object Manager'. Under 'Users', 'Permission Set Groups' is expanded, showing 'Permission Sets' selected. The main content area is titled 'Permission Sets' and displays a table of existing permission sets. The table columns are 'Action', 'Permission Set Label', 'Description', and 'License'. Some rows have a yellow warning icon next to them. The table includes entries like 'Buyer', 'CRM User', 'Commerce Admin', 'Contact Center Agent', 'Contact Center Supervisor', 'Experience Profile Manager', 'Facility Manager', 'Field Service Mobile Standard PermSet', 'Merchandiser', 'Order Management Agent', 'Order Management Operations Manager', and 'Order Management Shopper'. The 'Description' column provides a brief overview of each permission set's capabilities. The 'License' column indicates which license is required for each set. At the bottom of the table, there are pagination controls showing '1-25 of 29' and '0 Selected'.

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

The image displays two identical screenshots of the Salesforce 'Permission Sets' creation interface, positioned side-by-side. Both screenshots are taken from the 'Setup' menu under the 'Users' category.

**Left Screenshot:**

- Label:** salesmanager
- API Name:** salesmanager
- Description:** (empty)
- Session Activation Required:** (unchecked)

**Right Screenshot:**

- Label:** salesmanager
- API Name:** salesmanager
- Description:** (empty)
- Session Activation Required:** (unchecked)

In both screenshots, the 'Enter permission set information' section is filled with the same values: 'Label' and 'API Name' both set to 'salesmanager'. The 'Description' field is empty. The 'Session Activation Required' checkbox is unchecked. Below this section, the 'Select the type of users who will use this permission set' section contains a note about license assignment and a dropdown menu set to '-None-'.

Salesforce Developer Session | artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2FOPSSj000008Phok%3FsfdcFrameOrigin%3Dhttps%253A... | Reset Password | Salesforce | + | Finish update

**Permission Set Overview**

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

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

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

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

**Apex Class Access**  
Permissions to execute Apex classes

**Visualforce Page Access**  
Permissions to execute Visualforce pages

**External Data Source Access**  
Permissions to authenticate against external data sources

**Flow Access**  
Permissions to execute Flows

**Object Settings**

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

Two screenshots of the Salesforce Setup interface showing the configuration of a Permission Set named "salesmanager".

**Screenshot 1 (Top):** The "Object Settings" tab is selected for the "Bank" object. The "Tab Settings" section shows the "Available" and "Visible" checkboxes for the "Bank" tab. The "Object Permissions" section lists permissions for the "Bank" object:

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

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

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

**Screenshot 2 (Bottom):** The "Object Settings" tab has been changed to "Bank". The "Tab Settings" section shows the "Save" and "Cancel" buttons. The "Object Permissions" section now shows different permission settings for the "Bank" object:

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

The "Field Permissions" section remains the same as in Screenshot 1.

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

Setup Home Object Manager

User Management Settings

Current Assignments

No assignments defined.

Select Users to Assign

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

Salesforce Developer Session | artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/PermSets/QPS5j00000Phok/PermissionSetAssignment/new

Setup Home Object Manager

Select an Expiration Option For Assigned Users

No expiration date

Specify the expiration date

Time Zone

Selected Users

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

Back Assign

Search Setup

... > PERMISSION SET 'SALESMANAGER'

1 assignments were successful.

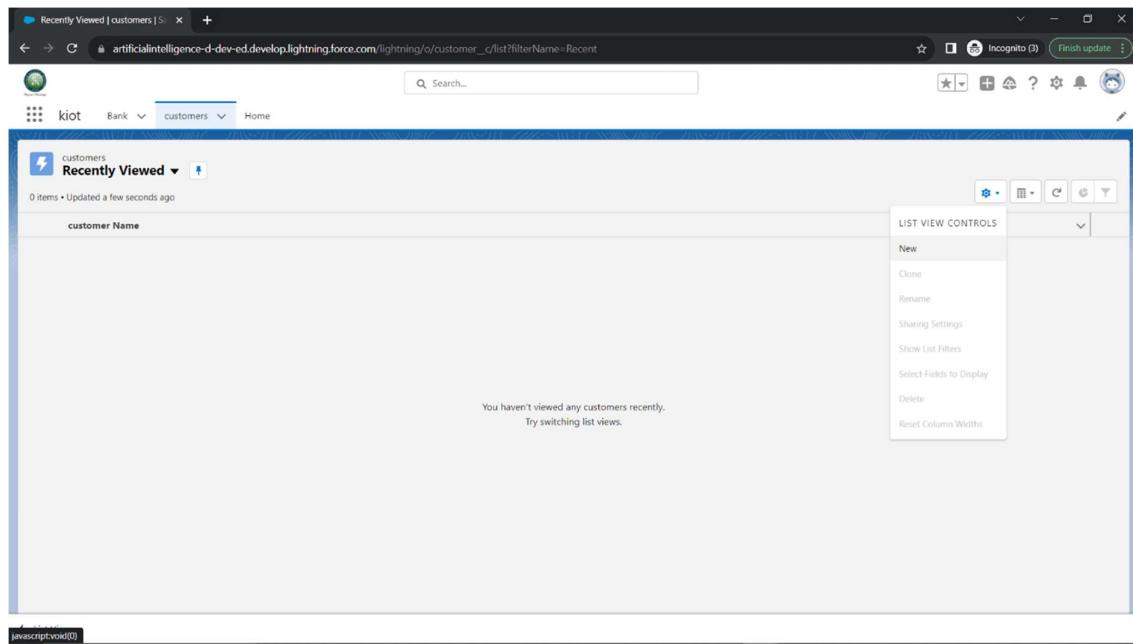
Assignment Summary

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

Done

Setup Home Object Manager

Search Setup

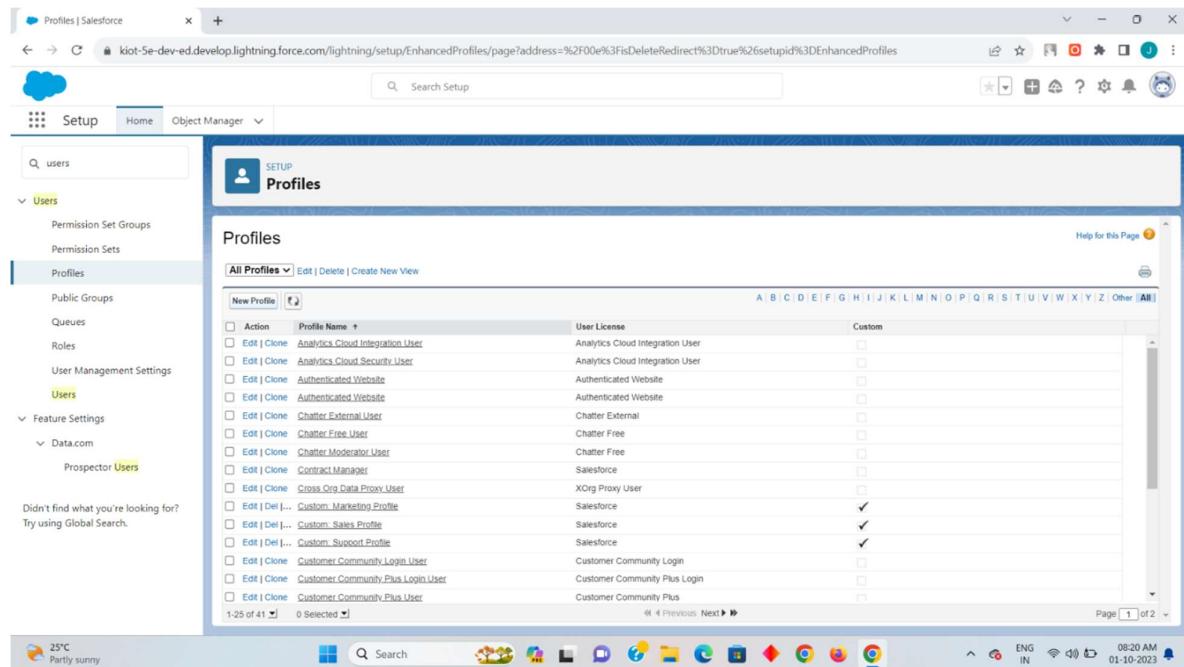


3.. Suppose there are 2 Users and they are having Create, Read, Edit access on Account Object with the same profile but we want to open up the access for one user to delete how will you implement the Security setting.

## Solution:

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

## Setup-quick search[profile]

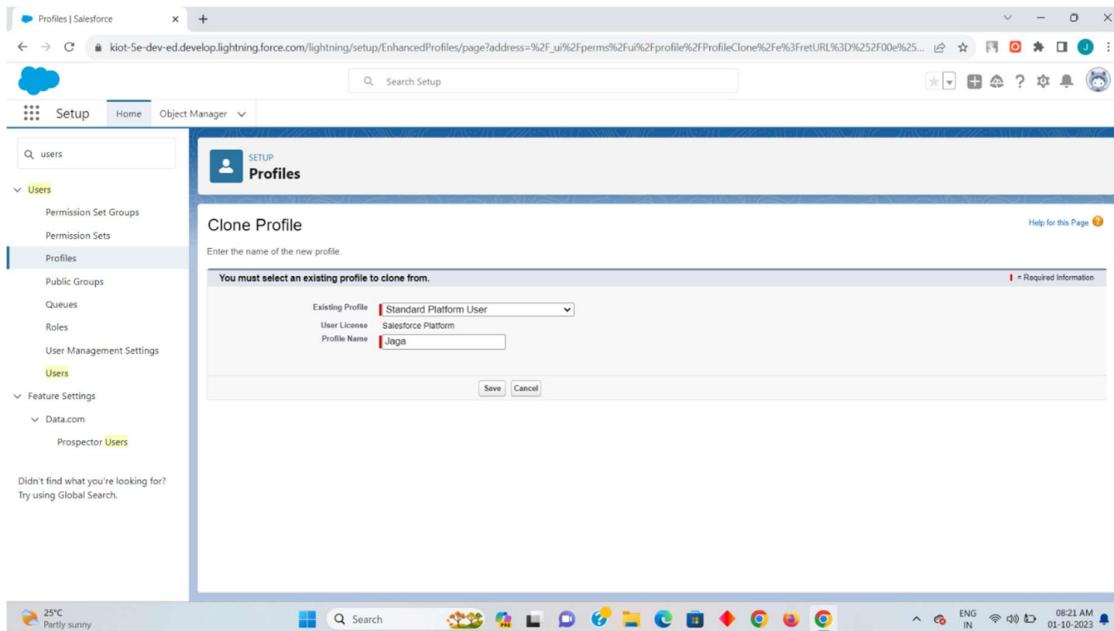


The screenshot shows the Salesforce Setup interface with the following details:

- Page Header:** Profiles | Salesforce
- Search Bar:** Search Setup
- Left Navigation:** Setup, Home, Object Manager, Users (selected), Profiles, Public Groups, Queues, Roles, User Management Settings, Feature Settings, Data.com, Prospector Users.
- Message:** Didn't find what you're looking for? Try using Global Search.
- Content Area:** **Profiles** page. The URL is [kot-5e-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e%3FisDeleteRedirect%3Dtrue%26setupid%3DEnhancedProfiles](https://kot-5e-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e%3FisDeleteRedirect%3Dtrue%26setupid%3DEnhancedProfiles).
  - Table Headers:** Action, Profile Name, User License, Custom.
  - Table Data:** A list of profiles including Analytics Cloud Integration User, Analytics Cloud Security User, Authenticated Website, Chatter External, Chatter Free, Contract Manager, XOrg Proxy User, Customer Community Login, Customer Community Plus Login, Customer Community Plus User, etc.
- Page Footer:** 25°C Partly sunny, Search bar, various browser icons, and system status indicators (ENG IN, 08:20 AM, 01-10-2023).

## Step 2:

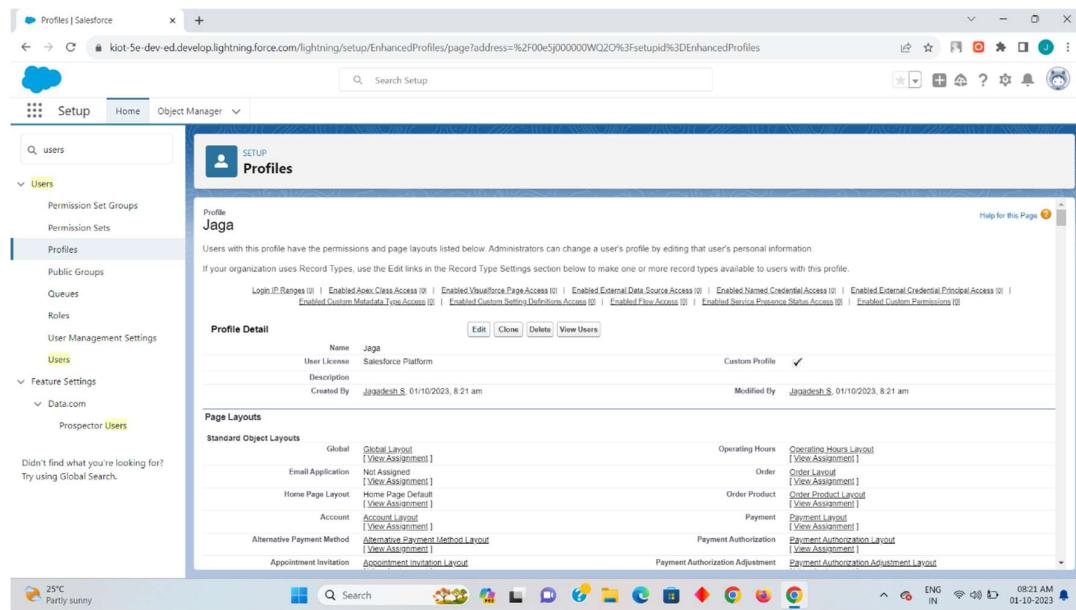
Click on the new to create a new profile along with the label and Api



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

## Step 3:

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



Profiles | Salesforce

Search Setup

Setup Home Object Manager

Q users

Users

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

Communication Subscription Consents

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

Custom Object Permissions

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

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Enable different Experience Cloud login policies for employees:

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

25°C Partly sunny

Search

ENG IN 08:21 AM 01-10-2023

Profiles | Salesforce

Search Setup

Setup Home Object Manager

Q users

Users

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

Communication Subscription Consents

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

Custom Object Permissions

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

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

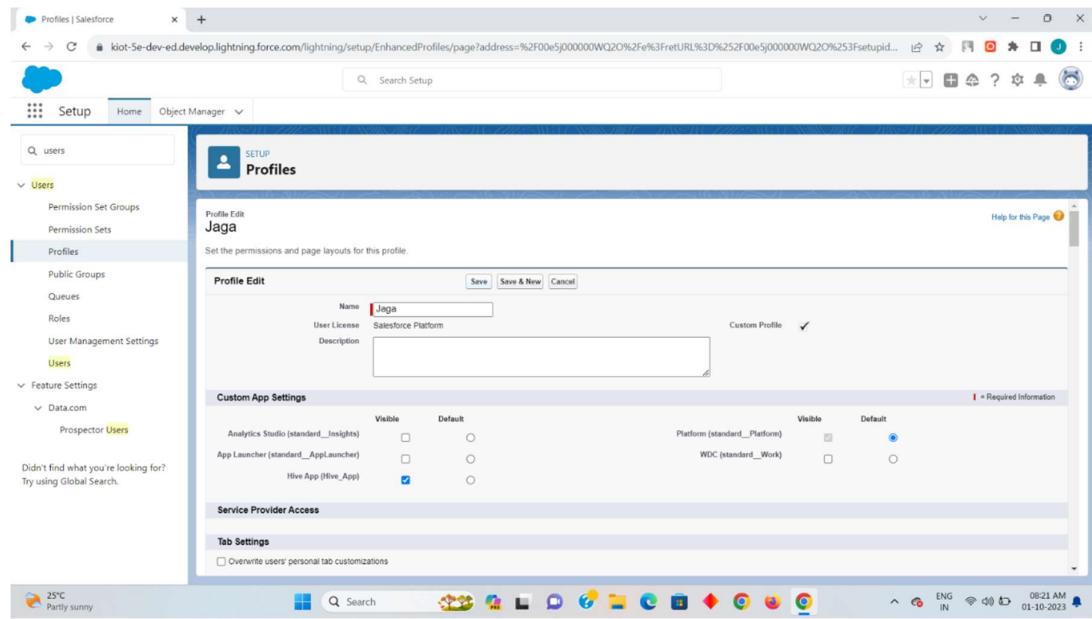
Enable different Experience Cloud login policies for employees:

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

25°C Partly sunny

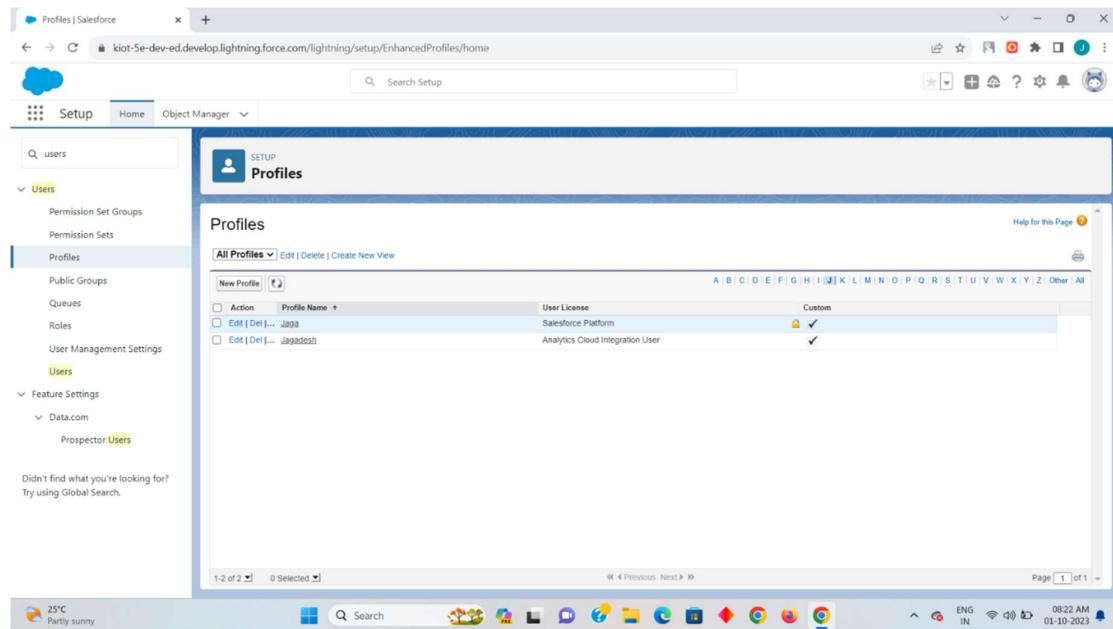
Search

ENG IN 08:21 AM 01-10-2023



## Step 4

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



## Step 5:

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

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

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>   Edit	Chatter_Expert	Chatter	chatty_000500000cBroseaf.6z9t8krkd4@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>   Edit	Grey_Jan	grey	jane_gray.fyqnmimoaim.cz7d2konto3@gmail.com		<input checked="" type="checkbox"/>	Customer Community User
<input type="checkbox"/>   Edit	S.Jaga	JS	jaga098@gmail.com	CEO	<input type="checkbox"/>	Standard Platform User
<input type="checkbox"/>   Edit	S.Jagadeesh	JS	x0w@gmail.com	SF Admin	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>   Edit	S.Jagadeesh	JS	jaga1117@gmail.com	Channel Sales Team	<input type="checkbox"/>	Standard Platform User
<input type="checkbox"/>   Edit	User_Integration	Integ	integration@00d900000cc@useaf.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>   Edit	User_Security	sec	insightssecurity@00e500000cB@oseaf.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

Users | Salesforce

Setup Home Object Manager

Q users

Users

Permission Set Groups

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

New User

User Edit Save Save & New Cancel

General Information

First Name: Jagadish11  
Last Name: S  
Alias: JS  
Email: jsr123@gmail.com  
Username: jsr123@gmail.com  
Nickname: User169612875144962592  
Title:   
Company:   
Department:   
Division:

Role: Director, Channel Sales  
User License: Salesforce Platform  
Profile: None  
Active:  Standard Platform User  
Marketing User:   
Office User:   
Knowledge User:   
Flow User:   
Service Cloud User:   
Site.com Contributor User:   
Site.com Publisher User:   
WDC User:   
Data.com User Type: None  
Data.com Monthly Addition Limit: Default Limit (500)  
Accessibility Mode (Classic Only):   
High-Contrast Palette on Charts:

Help for this Page

Did you find what you're looking for?  
Try using Global Search.

25°C Party sunny

Search

08:23 AM 01-10-2023 ENG IN

Users | Salesforce

Setup Home Object Manager

Q users

Users

Permission Set Groups

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

New User

User Edit Save Save & New Cancel

General Information

First Name: Jagadish22  
Last Name: S  
Alias: JS  
Email: jaa1@gmail.com  
Username: jaa1@gmail.com  
Nickname: User169612879963618745  
Title:   
Company:   
Department:   
Division:

Role: Marketing Team  
User License: Salesforce Platform  
Profile: None  
Active:  Standard Platform User  
Marketing User:   
Office User:   
Knowledge User:   
Flow User:   
Service Cloud User:   
Site.com Contributor User:   
Site.com Publisher User:   
WDC User:   
Data.com User Type: None  
Data.com Monthly Addition Limit: Default Limit (500)  
Accessibility Mode (Classic Only):   
High-Contrast Palette on Charts:

Help for this Page

Did you find what you're looking for?  
Try using Global Search.

25°C Party sunny

Search

08:23 AM 01-10-2023 ENG IN

Users | Salesforce

Setup Home Object Manager

Q users

Users

Permission Set Groups

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

All Users

Help for this Page

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

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

View: All Users | Edit | Create New View

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Edit S.jsr123	JS	jsr123@gmail.com	CEO	<input type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	Edit S.Jagadish	JS	js@gmail.com	SF Admin	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Edit S.Jagadish	JS	jsr117@gmail.com	Channel Sales Team	<input type="checkbox"/>	Standard Platform User
<input checked="" type="checkbox"/>	Edit S.Jagadish11	JS	jsr123@gmail.com	Director, Channel Sales	<input checked="" type="checkbox"/>	jaga
<input checked="" type="checkbox"/>	Edit S.Jagadish22	JS	jsr123@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	jsr123

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

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

Help for this Page

Did you find what you're looking for?  
Try using Global Search.

25°C Party sunny

Search

08:24 AM 01-10-2023 ENG IN

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

## Step 6:

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

setup-quick search[permission set]-new-fill label name [auto select the API name]-click on save-object settings-accounts.

Permission Sets | Salesforce

kiot-5e-dev-ed.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.

25°C Partly sunny

Search Setup

Permission Sets

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

All Permission Sets | Edit | Delete | Create New View

New

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

1-25 of 30 0 Selected

Page 1 of 2

https://kiot-5e-dev-ed.lightning.force.com/one/app#/setup/PermSets/home

ENG IN 08:24 AM 01-10-2023

Permission Sets | Salesforce

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

Setup Home Object Manager

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

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

25°C Partly sunny

Search Setup

Permission Sets

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:

Save Cancel

https://kiot-5e-dev-ed.lightning.force.com/one/app#/setup/PermSets/page?address=%2Fudd%2FPermissionSet%2FnewPermissionSet.apex

ENG IN 08:24 AM 01-10-2023

Permission Sets | Salesforce

kiot-5e-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2FOPSS%000008Pgtu%3FfdcFrameOrigin%3Dhttps%25A%252F%252Fkiot-5e-dev-ed.devel...

Setup Home Object Manager

Q users Search Setup

Users

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

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

SETUP Permission Sets

Permission Set permission12

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

Permission Set Overview

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

Apps

Assigned Apps  
Assigned Connected Apps  
Object Settings  
Apex Permissions  
Apex Class Access  
Visualforce Page Access  
External Data Source Access

25°C Partly sunny

Search

ENG IN 08:24 AM 01-10-2023

Permission Sets | Salesforce

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

Setup Home Object Manager

Q users Search Setup

Users

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

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

SETUP Permission Sets

Permission Set permission12

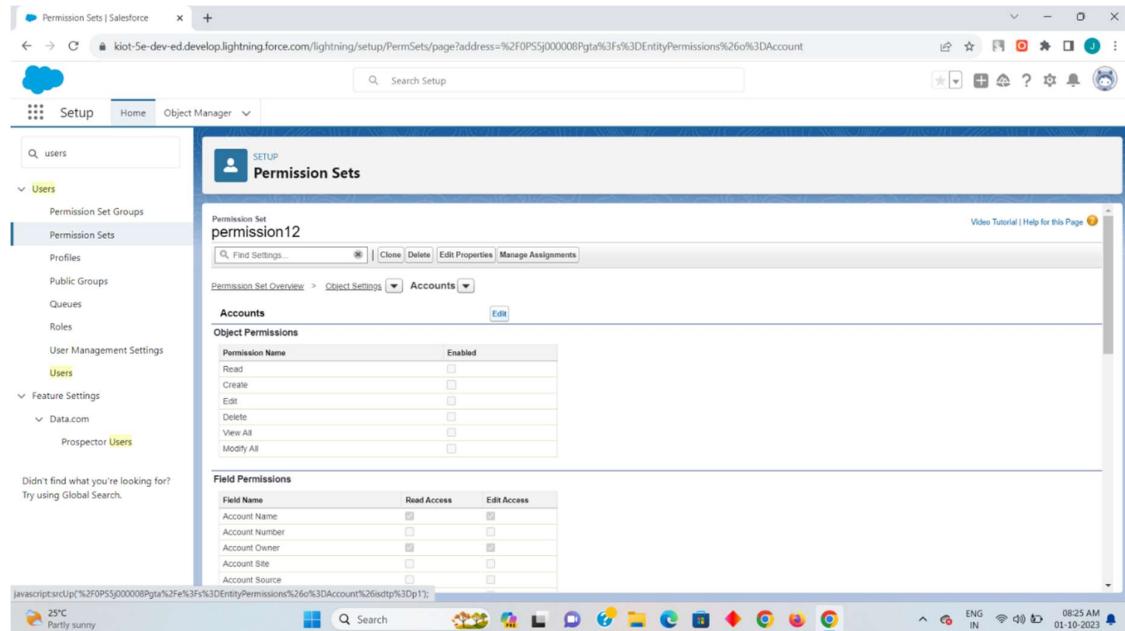
Object Settings

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

25°C Partly sunny

Search

ENG IN 08:25 AM 01-10-2023



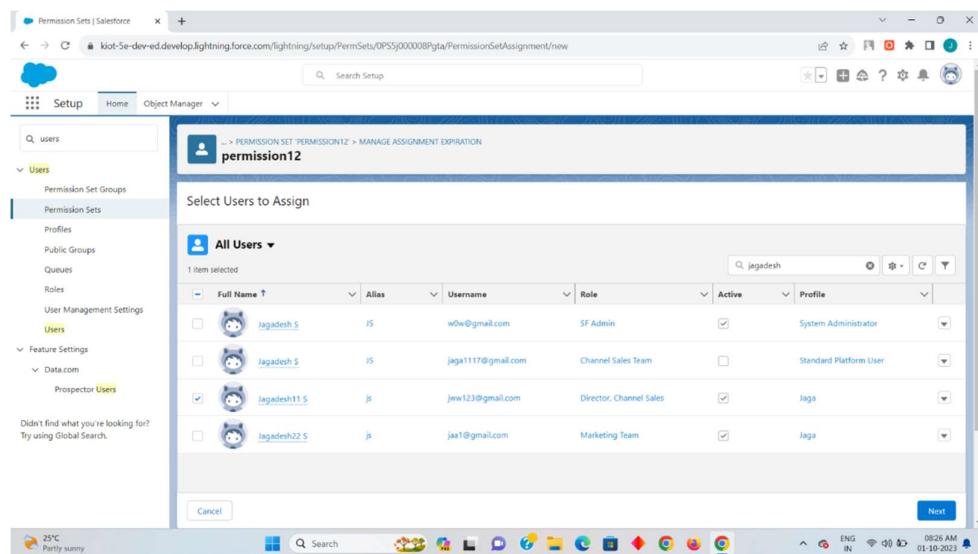
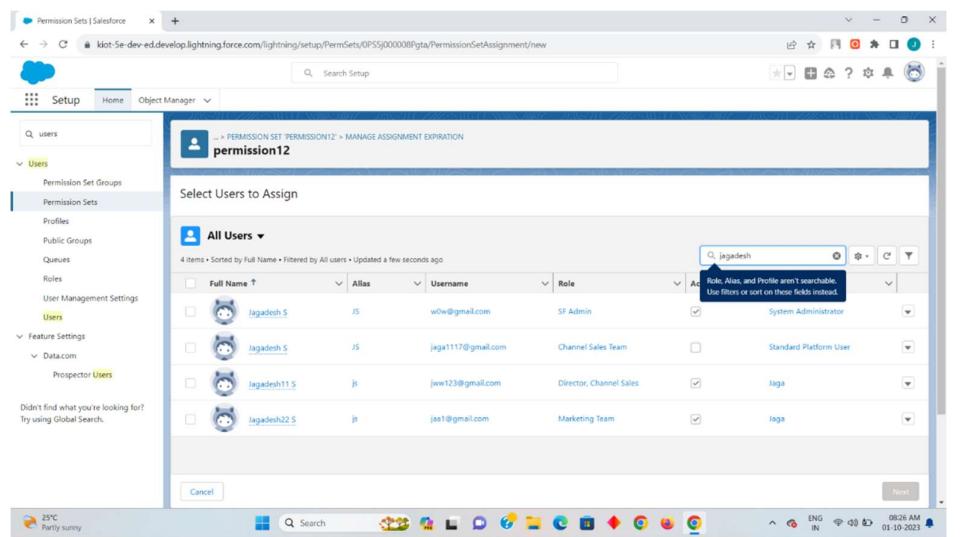
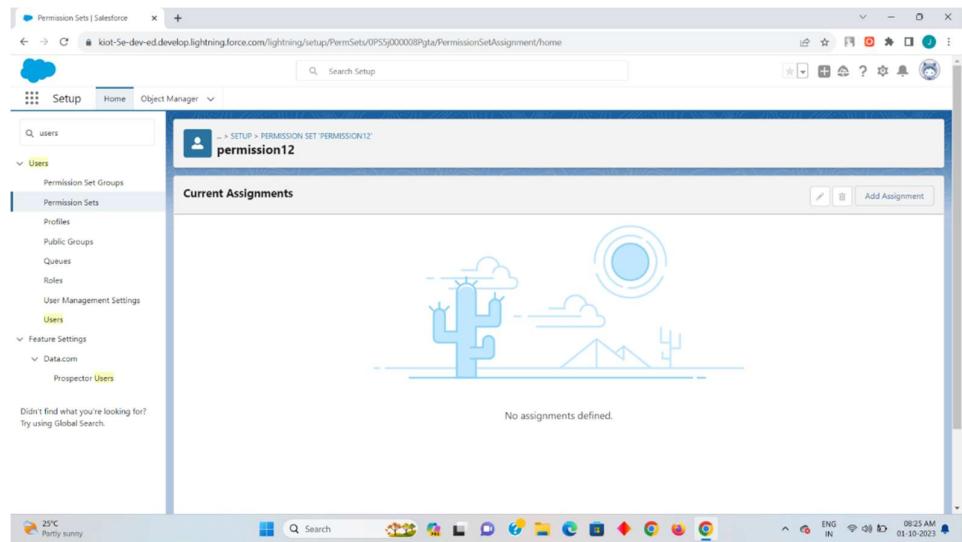
## Step 7:

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

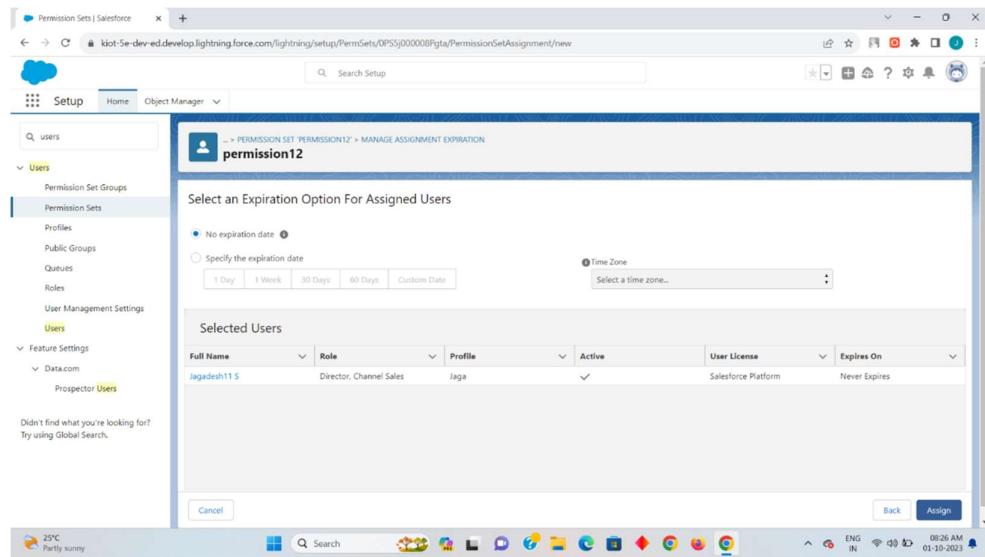
The screenshots show the Salesforce Setup interface for managing Permission Sets. In the top screenshot, the 'Edit' checkbox is unchecked. In the bottom screenshot, the 'Edit' checkbox is checked, indicating the change has been saved.

## Step 8

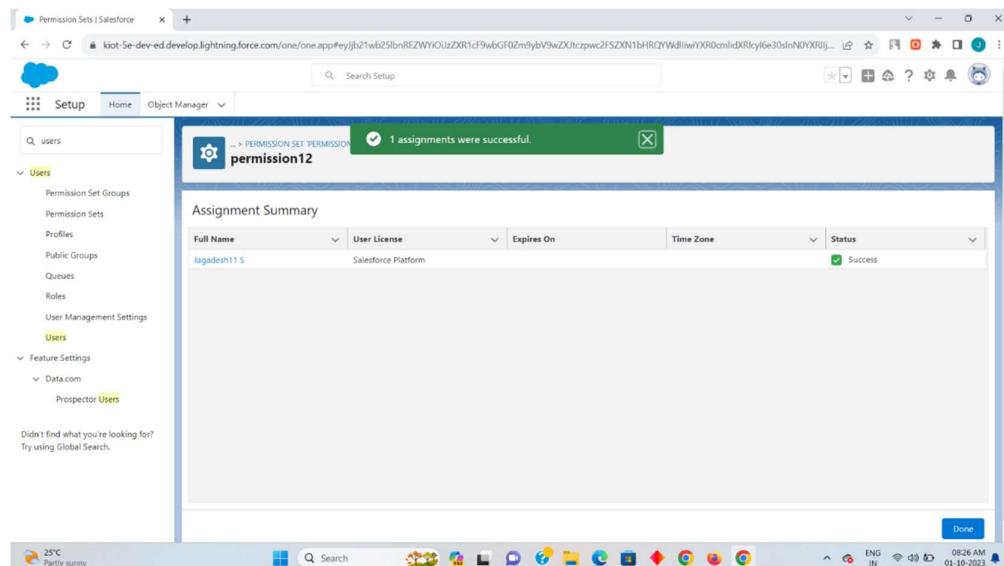
Now click on add assignment there you will find your two created users click on any one user to give a special access as delete on it and then click on assign so that the specific selected user can have a special access as delete on it.



Click on next.



Now click on Assign.



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

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

Solution:

Step 1: Create a Custom Object

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

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

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

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

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

The screenshot shows the 'Email Template' page in Salesforce. The template is named 'Thank You Email - Survey'. The 'Details' tab is selected. In the 'Information' section, the 'Email Template Name' is 'Thank You Email - Survey', 'Related Entity Type' is 'Survey Result', and 'Folder' is 'Public Email Templates'. A checkbox 'Made in Email Template Builder' is checked. In the 'Message Content' section, the 'Subject' is 'Thank You For Completing Our Survey!', 'Enhanced Letterhead' is selected, and the 'HTML Value' contains the following text:

```
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
```

In the 'Additional Information' section, 'Created By' is Rakesh Gupta, 'Created Date' is 12/21/2020, 4:23 PM, 'Last Modified By' is Rakesh Gupta, and 'Last Modified Date' is 12/21/2020, 4:32 PM.

## Step 3: Create an Email Alert

- 1. Click Setup.**
- 2. In the Quick Find box, type Email Alerts.**
- 3. Select Email Alerts, click on the New Email Alert button.**
- 4. Name the Email Alert and click the Tab button. The Unique Name will populate.**

5. For Object select Survey Result.
6. For the Email Template chooses Lightning Email Template Thank You Email – Survey.
7. For Recipient Type select Email Field: Email.
8. Click Save.

**Edit Email Alert**

**Survey - Thank You Email**

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

**Email Alert Edit**

Description: Survey - Thank You Email

Unique Name: Survey\_Thank\_You\_Email

Object: Survey Result

Email Template: Thank You Email - Survey

Protected Component:

Recipient Type: Search: User for: Find

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

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

Additional Emails:

From Email Address: Current User's email address

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

Save | Save & New | Cancel

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

1. Click Setup.

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

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

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

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

**2. Click Add Row**

**3. Row 2:**

**1. Field: Email\_c**

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

**4. Click Add Row**

**5. Row 3:**

**1. Field: Name\_c**

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

**{!Name.lastName}**

**6. Click Add Row**

**7. Row 3:**

**1. Field: Rating\_c**

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

**7. Click Done.**

Edit Create Records

Create Salesforce records using values from the flow.

* Label	* API Name
Save Response	Save_Response

Description

How Many Records to Create

- One
- Multiple

How to Set the Record Fields

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

Create a Record of This Object

\* Object

Survey Result

Set Field Values for the Survey Result

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

+ Add Field

Manually assign variables

Cancel Done

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

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

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

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

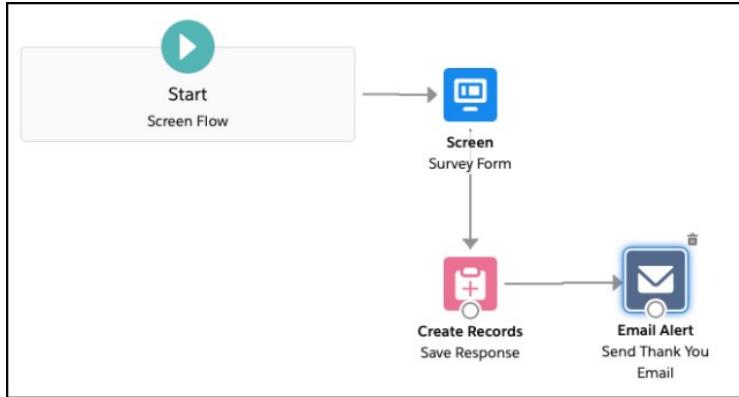
Edit "Survey - Thank You Email" email alert

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

* Label	* API Name
Send Thank You Email	Send_Thank_You_Email
Description	
<pre>-----</pre>	
Set Input Values	
A_a * Record ID	(!Save_Response)

Cancel      Done

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



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

## **4. How to Run the Flow: User or System Context—Depends on How Flow is Launched**

**5. Type: Screen Flow**

**6. API Version for Running the Flow: 51**

**7. Interview Label: Survey**

**{!\$Flow.CurrentDateTime}**

**8. Click Save.**

Save as

**A New Version** **A New Flow**

\* Flow Label  \* Flow API Name

Description

Hide Advanced

How to Run the Flow i

\* Type

\* API Version for Running the Flow

Interview Label i  
Insert a resource...

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

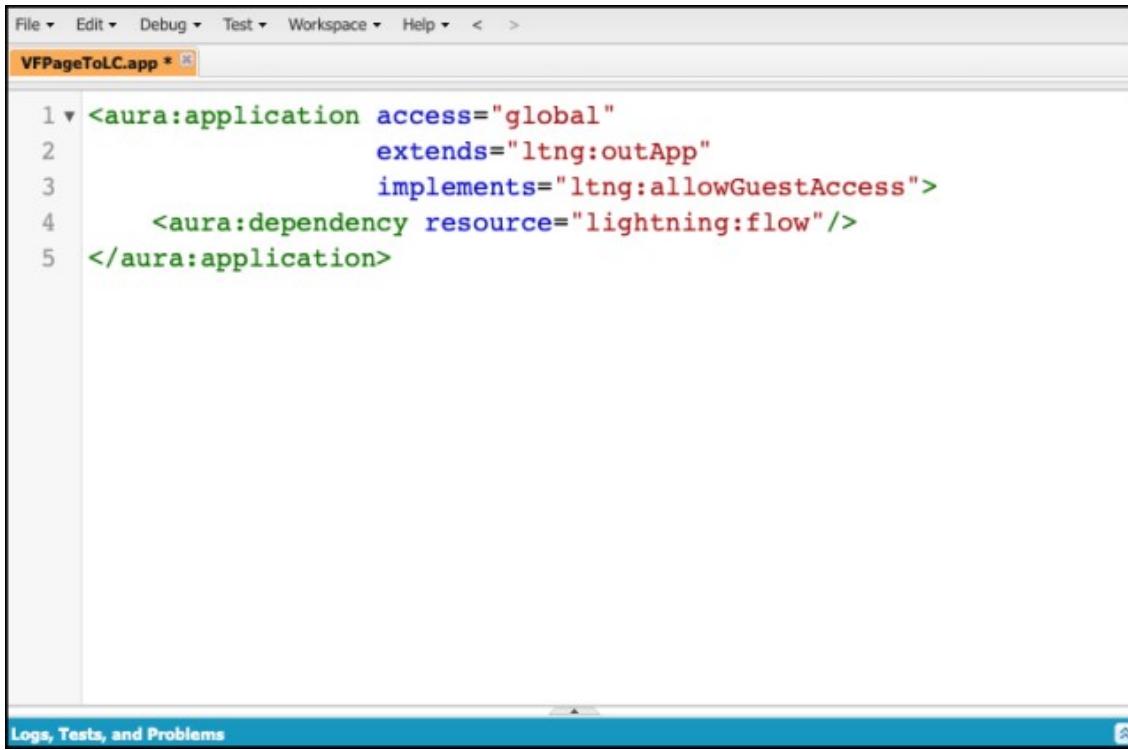
Status: Active Type: Screen Flow Version Number: 2

**Cancel** **Save**

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

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

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



The screenshot shows the Eclipse IDE interface with a code editor window titled "VFPPageToLC.app \*". The code in the editor is an Aura component definition:

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

Below the code editor, there is a status bar with the text "Logs, Tests, and Problems".

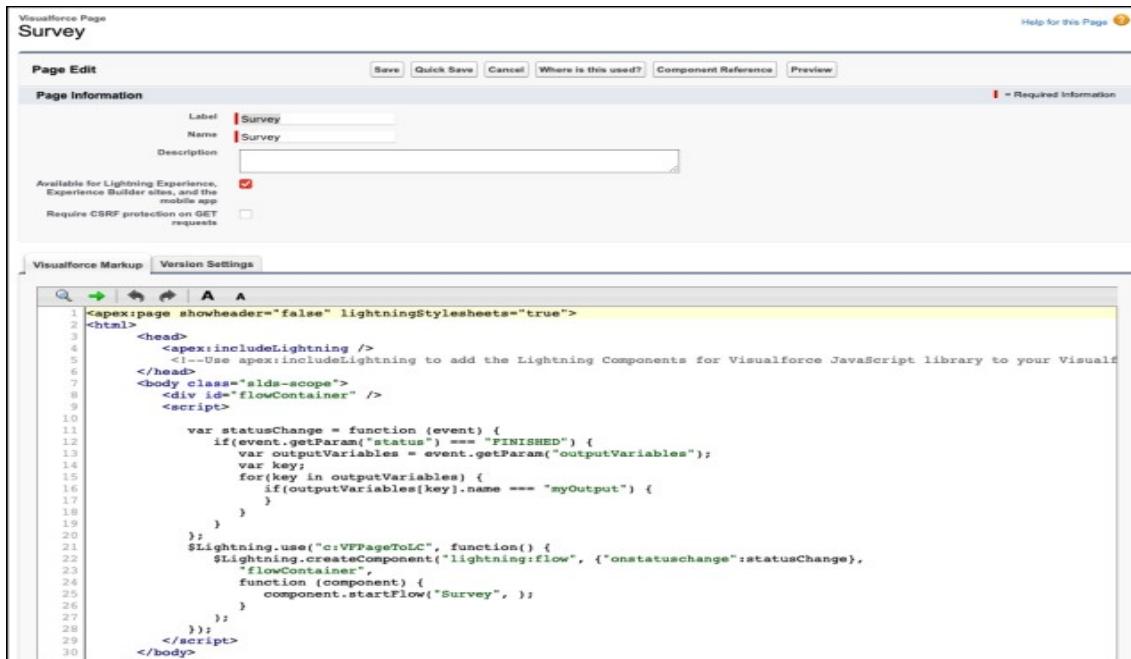
## Step 6: Create a Visualforce Page and Embed Your Flow Into It

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

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

# component on the page using **\$Lightning.createComponent()**

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



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

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

1. Click **Setup**.

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

The screenshot shows the 'Site Edit' page in Salesforce. The 'Site Label' is set to 'Survey'. The 'Site Name' is also 'Survey'. The 'Site Description' field is empty. The 'Site Contact' and 'Default Record Owner' are both set to 'Rakesh Gupta'. The 'Default Web Address' is 'http://kathar-developer-edition.gus.force.com/survey'. The 'Active' checkbox is checked. The 'Active Site Home Page' is 'Survey' and has a preview link. The 'Inactive Site Home Page' is 'InMaintenance' and has a preview link. The 'Site Template' is 'SiteTemplate'. There are several other fields like 'Site Robots.txt', 'Site Favorite Icon', 'Analytics Tracking Code', 'URL Rewriter Class', 'Enable Feeds', 'Clickjack Protection Level' (set to 'Allow framing by the same origin only (Recommended)'), 'Require Secure Connections (HTTPS)' (checked), 'Lightning Features for Guest Users' (checked), 'Upgrade all requests to HTTPS' (checked), 'Enable Content Sniffing Protection' (checked), 'Enable Browser Cross Site Scripting Protection' (checked), 'Referrer URL Protection' (checked), and 'Guest Access to the Payments API' (unchecked).

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

## Proof of Concept

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

Survey

Name

First Name

Alok

Last Name

Sinhal

\*Email

[REDACTED]

\*Rating

5

\*Comment

Awesome Blog

G

Next

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

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

 Survey Site Guest User [yia b|9amq6fe7r.b-cdzwmaa.gso.bnc.salesforce.com](#) 8:09 PM (1 minute ago) [Star](#) [Reply](#) [Forward](#) [More](#)

to me \*

Hi Alok Sinhal,

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

[Reply](#) [Forward](#)