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1. Create a Master-Detail Relationship between two Custom objects and also create a RollUp 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 "Department_C". If you haven't already created these objects, you can do so by going to Setup > Object Manager > Create > Custom Object.

Setup Home Object Manager

New Custom Object

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

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

Custom Object Information [Help for this Page](#)

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

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

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

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

Context-Sensitive Help Setting:

- Open the standard Salesforce.com Help & Training window
- Open a window using a Visualforce page

Contact Name:

Enter Record Name Label and Format

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

Record Name:	<input type="text" value="College Name"/>	Example:	Account Name
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Data Type:

Optional Features

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

Object Classification

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

- Allow Sharing
- Allow Bulk API Access
- Allow Streaming API Access

Deployment Status

[What is this?](#)

- In Development
- Deployed

Search Status

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

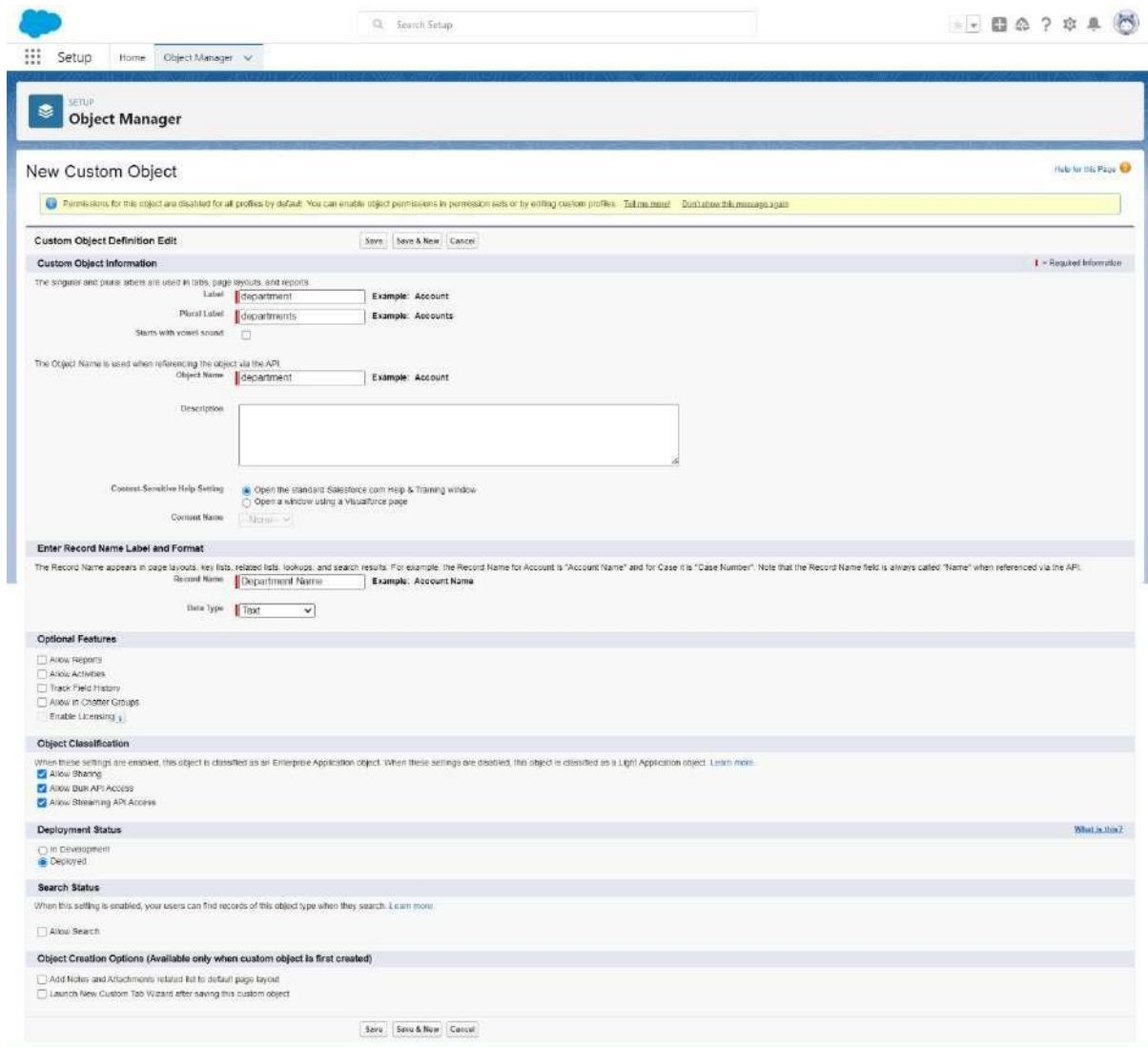
- Allow Search

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

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

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

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



Step2: Create a Master-Detail Relationship

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 the settings as needed and click "Next".
9. Specify the field-level security and add it to relevant page layouts.
10. Click "Next" and "Save" to create the relationship.

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

Object Details: CDepartment

Fields & Relationships:

- Page Layouts: API Name: CDepartment__c
- Buttons, Links, and Actions: Custom
- Compact Layouts: ✓
- Field Sets: Singular Label: CDepartment, Plural Label: CDepartments
- Object Limits: CDepartments
- Record Types: Standard salesforce.com Help Window
- Related Lookup Filters: None
- Restriction Rules: None
- Scoping Rules: None
- Triggers: None
- Flow Triggers: None
- Validation Rules: None

Object Settings:

- Description: None
- Enable Reports: None
- Track Activities: None
- Track Field History: None
- Deployment Status: Deployed
- Help Setting: None

Buttons: Edit, Delete

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

Object Details: CDepartment

Fields & Relationships:

- Page Layouts: None
- Lightning Record Pages: None
- Buttons, Links, and Actions: None
- Compact Layouts: None
- Field Sets: None
- Object Limits: None
- Record Types: None
- Related Lookup Filters: None
- Restriction Rules: None
- Scoping Rules: None
- Triggers: None
- Flow Triggers: None
- Validation Rules: None

New Relationship: Step 3. Enter the label and name for this lookup field.

Step 3 of 6:

Field Labels: college

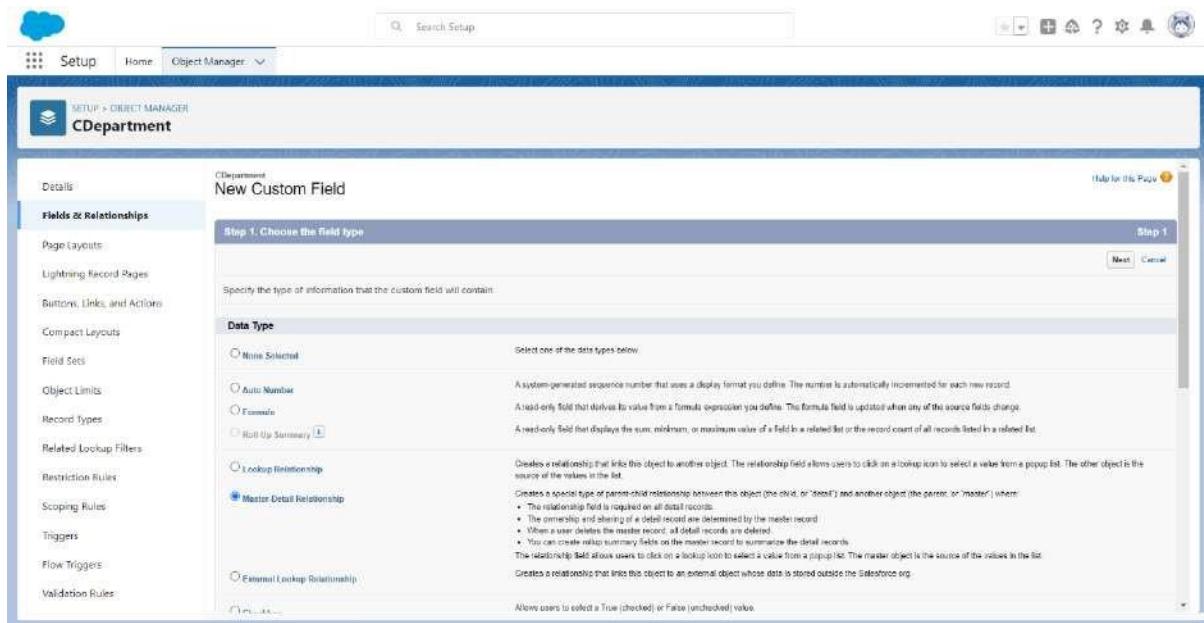
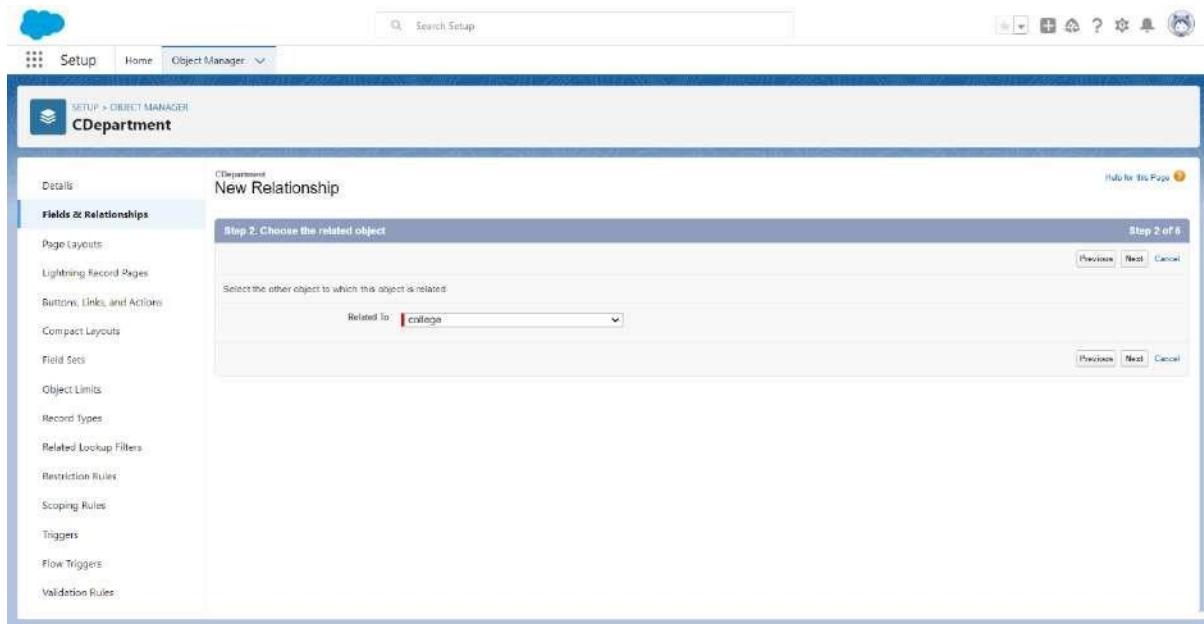
Field Names: college

Sharing Settings:

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

Allow Reparenting: Child records can be reparented to other parent records after they are created.

Auto Add to custom report type: Add this field to existing custom report types that contain this entry.



Step3:CíeatetheRoll-UpSummaíyField

**Now,let'scíeateaRoll-UpSummaíyFieldon
the "College_C"tocalculatethetotalnumbeí
ofírelatedíecoidsin "DepaítmentC":**

1. **Stillonthe "Collegec"settings,goto
"Fields & Relationships."**

2. Clice tkc "Ncw" b"tto" to cícatc a "cw
c"ztoÉ ricld.
- «. Ckoosc "Roll-UpS" ÉÉaíQ" a3tkc
datatQpc.
4. E"tcíalabclroítkcricld, c.g.,
5. Ckoosc "Co" "t" a3tkc Roll-UpL'Qpc.
6. Sclcct " KcpaítÉc" t_c" a3tkcobjcct
toíoll"pi" roíÉatio"ríoÉ.
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rltcí tkc íclatcd íccoíd3.
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addittoílc:a"tpagclaQo"t3.
10. Clice "Ncxt" a"d "Sa:c" to cícatc tkc
Roll-Up S"ÉÉaíQ Ficld.

SETUP > OBJECT MANAGER
CDepartment

Details

Fields & Relationships
4 items. Sorted by Field Label

	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Page Layouts	college	college__c	Master-Detail(college)		✓
Lightning Record Pages	Created By	CreatedById	Lookup(User)		
Buttons, Links, and Actions	Department Name	Name	Text(80)		✓
Compact Layouts	Last Modified By	LastModifiedById	Lookup(User)		

SETUP

tabs

User Interface

Rename Tabs and Labels

Tabs

Custom Tabs

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

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed 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	New	What Is This?	Description
Edit Del	Books		Books	
Edit Del	Research Proposal		Square	
Edit Del	student		Box	

Web Tabs

New What Is This?

No Web Tabs have been defined.

Visualforce Tabs

New What Is This?

No Visualforce Tabs have been defined.

Lightning Component Tabs

New What Is This?

No Lightning component tabs have been defined.

Lightning Page Tabs

New What Is This?

No Lightning Page Tabs have been defined.

Setup | Home | Object Manager | college

SETUP > OBJECT MANAGER college

New Custom Field

Step 5 of 5

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

Step 5: Add to page layouts

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

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

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

Add Field: Page Layout Name
 college Layout

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

Previous | Save & New | Save | Cancel

Setup | Home | Object Manager | college

SETUP > OBJECT MANAGER college

New Custom Field

Step 4 of 5

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

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	Write	Read Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cloud Kicks Admin	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contact Manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Customer	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Entire CRM - All Subscription User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Previous | Next | Cancel

New Custom Field

Step 3. Define the summary calculation

Select Object to Summarize

Master Object: college
Summarized Object: CDDepartments

Select Roll-Up Type

COUNT
 SUM
 MIN
 MAX

Field to Aggregate:

Filter Criteria

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

Help for this Page

Step 3 of 5

Previous Next Cancel

New Custom Field

Step 2. Enter the details

Field Label: Total count

Field Name: Total_count

Description:

Help Text:

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

Help for this Page

Step 2 of 5

Previous Next Cancel

New Custom Field

Step 1. Choose the Field type

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

Data Type

- None Selected** Select one of the data types below.
- Auto Number** A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
- Formula** A field-only field that derives its value from a formula expression you define. This formula field is updated when any of the source fields change.
- Roll Up Summary** A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
- Lookup Relationship** Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
- Master-Detail Relationship** Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.
- External Lookup Relationship** Allows users to select a True (checked) or False (unchecked) value.

Fields & Relationships

4 items. Sorted by Field Label

	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Page Layouts	college Name	Name	Text(80)		✓
Lightning Record Pages	Created By	CreatedById	Lookup(User)		
Buttons, Links, and Actions	Last Modified By	LastModifiedById	Lookup(User)		
Compact Layouts	Owner	OwnerId	Lookup(User/Group)		✓

Step 4: CícatcaLight → i → gApp

1. L'Qpca → d3clcct "App Ma → agcí."
2. Clice "NcwLight → i → gApp."
- «. Filli → bazici → roí Éatio → (Na Éc,

Kc:clopcíNaÉc, Kc3cíiptio →).

4. *Ckoozc tkc App L'Qpc (Sta ↗daíd, Co→bolc, C"ztoÉ).*
5. *C"ztoÉizctkcLogoa→dColo"í SckcÉc.*
6. *Co↗rig"íc Na:igatio↗ ItcÉz (objcct3toappcaíi→tkcapp'zÉc →').*
7. *ScttkcAppVizibilitQ(dcra"Itaccc33).*
- ⑧. *Optio↗allQ, ckoozc Rccoid Pagc3 (Ligt↗i↗g Rccoid Pagc3).*
9. *Rc:icwa→dSa:ctkcapp.*
10. *A33ig→tkcappto"zci3oípíorilc3.*
11. *L'c3ttkcappwitkca33ig→cd"zci3.*

Setup Home Object Manager

Search Setup

Tabs

New Custom Object Tab

Step 2 of 3

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.

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

Step 2: Add to Profiles

Help for this Page

Apply one tab visibility to all profiles (Default On) Apply a different tab visibility for each profile

Profile	Tab Visibility
Analytics Cloud Integration User	Default On
Analytics Cloud Security User	Default On
Authenticated Website	Default On
Authenticated Website	Default On
Cloud Tools Admin	Default On
Contact Manager	Default On
Cross Org Data Privacy 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 Pass Login User	Default On
Customer Community Pass 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 Subscribers User	Default On
Partner Community Login User	Default On
Partner Community User	Default On
Read Only	Default On
Research Manager	Default On
Research User	Default On
Salesforce API Only System Integrations	Default On
Sales User	Default On
Security Profile	Default On
Silver Partner User	Default On
Solution Manager	Default On
Standard Platform User	Default On
Standard User	Default On
System Administrator	Default On

Previous Next Cancel

New Custom Object Tab

Step 1. Enter the Details

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

Selected an existing custom object or create a new custom object now.

Object: config

Tab Style: Jewel

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

Splash Page Custom Link: None

Enter a short description.

Description:

Next Cancel

Step 2. Add to Custom Apps

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"/>
Edit Solutions (standard_LightningEdit)	<input checked="" type="checkbox"/>
Salesforce Scheduler Setup (standard_LightningScheduler)	<input checked="" type="checkbox"/>

Append tab to user's existing personal customizations

Previous Save Cancel

New Custom Object Tab

Step 1. Enter the Details

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

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 app types • Last Modified

App Name	Developer Name	Description	Last Modified Date	Type	Visibl...
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	Add launcher tabs	14/07/2023, 10:47 am	Classic	✓
4 Bulk 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 quotas.	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	Integrate on-page and 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	✓

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

- Header:** Includes the Salesforce logo, "Setup", "Home", "Object Manager", a search bar ("Search Setup"), and various navigation icons.
- Left Sidebar:** A navigation menu with sections like "User Interface" and "Tabs".
- Main Content Area:**
 - Section Header:** "Custom Tabs" (with a "Help for this Page" link).
 - Text:** "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."
 - Table:** "Custom Object Tabs" (with columns: Action, Label, Tab Style, Description). It lists five tabs:
 - Action: Edit | Delete, Label: Books, Tab Style: Box
 - Action: Edit | Delete, Label: Departments, Tab Style: Lightning
 - Action: Edit | Delete, Label: Courses, Tab Style: Round
 - Action: Edit | Delete, Label: Research Proposal, Tab Style: Square
 - Action: Edit | Delete, Label: Student, Tab Style: Box
 - Section Header:** "Web Tabs" (with "New" and "What Is This?" buttons).
 - Text:** "No Web Tabs have been defined."
 - Section Header:** "Visualforce Tabs" (with "New" and "What Is This?" buttons).
 - Text:** "No Visualforce Tabs have been defined."
 - Section Header:** "Lightning Component Tabs" (with "New" and "What Is This?" buttons).
 - Text:** "No Lightning component tabs have been defined."
 - Section Header:** "Lightning Page Tabs" (with "New" and "What Is This?" buttons).
 - Text:** "No Lightning Page Tabs have been defined."

Co-"*cl"ziō*"

Now, wkc → **c:cíQo**"cícáatcoí"pdatcaíccóíd
i → **tkc**"KcpaítÉc → **t_c**" íclatcd to a
"Collcg_c," tkc "L'otalCo" → **t_c**" ricld o → tkc
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oíga → izatio → '3 ícq"iícÉc → t3.

MECW

My college colleges Departments student Content

Search...

New Contact Edit New Opportunity

Related Details

college Name: mecw

Total count: 2

phone: 9087116402

email: kovi@gmail.com

Location: 90_00

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

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

History

This screenshot shows a college record in a CRM system. The college name is 'mecw'. There are two contacts associated with this college. The contact information includes a phone number (9087116402), an email address (kovi@gmail.com), and a location (90_00). The record was created by 'krishna s.' on 01/10/2023 at 11:10 am and last modified by the same user at 11:19 am.

2. Irtkícíci 2"3 cí, U3 cíAa→dU3 cíBi→tkc oíga→i3 atio→a→dwcwa→ti→Acco"→tob jcct tkatU3 cíA3 ko"1d→ot3 cctkcU3 cíBRccoid a→d"3 cíB3 ko"1d→ot3 ccU3 cíAíccoídtkc→ applQtkcScc"íitQroítkc"3 cí3.

Sol"tio→:

Stcp1:Cícatctwo3 cpaíatcc"3 toÉ píorilc3 , o→croíU3 cíAa→do→croíU3 cíB.

The screenshot shows the Salesforce Setup interface with the 'Profiles' page open. The left sidebar navigation includes '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', and 'Users'. The 'Profiles' section is currently selected. The main content area displays a table of profiles:

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

Page 1 of 41 | 0 Selected | Next >

The screenshot shows the Salesforce Setup interface under the Profiles section. The left sidebar includes options like Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, Administration, and Users. Under the Profiles section, there are links for Public Groups, Quotas, Roles, User Management Settings, and Users. The main content area displays a table titled 'Profiles' with columns for Action, Profile Name, and User License. The table lists several profiles, including 'Salesforce API Only System Integrations' (User License: Salesforce Integration), 'System Administrator' (User License: Salesforce), 'Silver Partner User' (User License: Silver Partner), 'Standard Manager' (User License: Standard), 'Standard Platform User' (User License: Salesforce Platform), 'Standard User' (User License: Salesforce), and 'System Administrator' (User License: Salesforce). A 'Custom' checkbox is checked for the first profile. Navigation buttons at the bottom include 'Page 1 of 1'.

The screenshot shows the 'Clone Profile' dialog box. The left sidebar is identical to the previous screenshot. The main dialog has a header 'Clone Profile' and a sub-header 'Enter the name of the new profile'. It contains a note 'You must select an existing profile to clone from.' Below this, there are three tabs: 'Existing Profile' (selected), 'Standard Platform User', and 'Profile Name'. A text input field is present under 'Profile Name'. At the bottom are 'Save' and 'Cancel' buttons.

Salesforce Developer Session

Object Manager | Salesforce

Profiles | Salesforce

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
- Quotas
- Roles
- User Management Settings
- Users

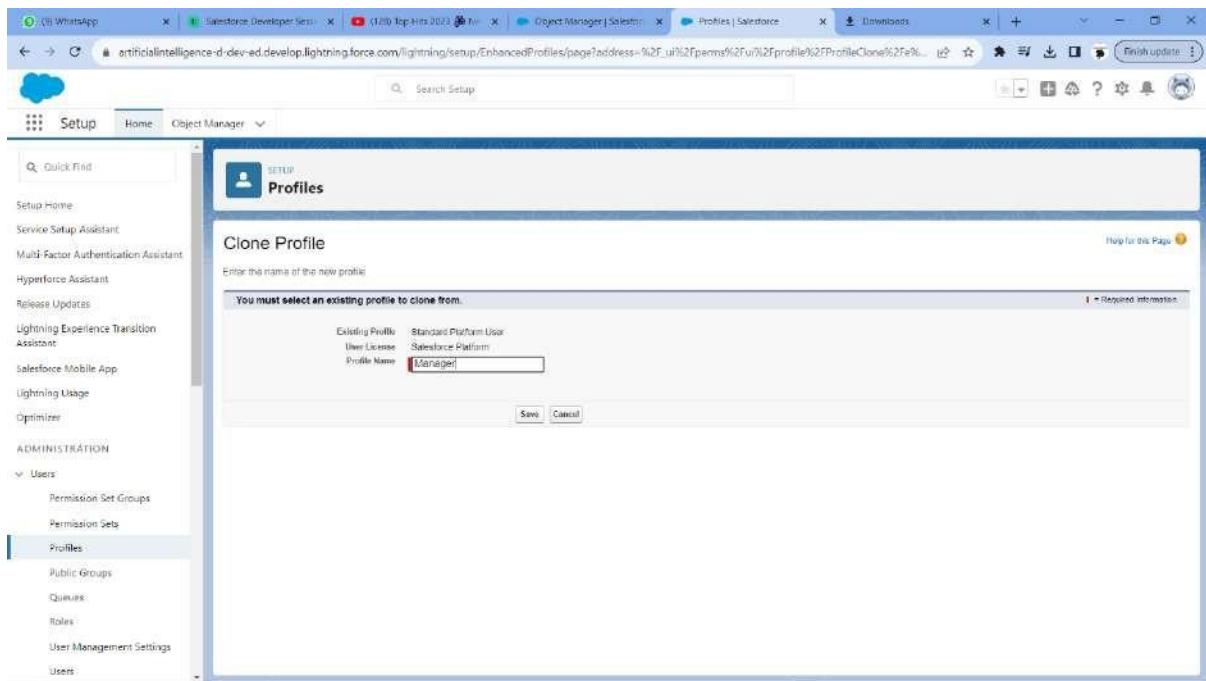
Clone Profile

You must select an existing profile to clone from.

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

Save Cancel

Help for this Page



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Profile Manager

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

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

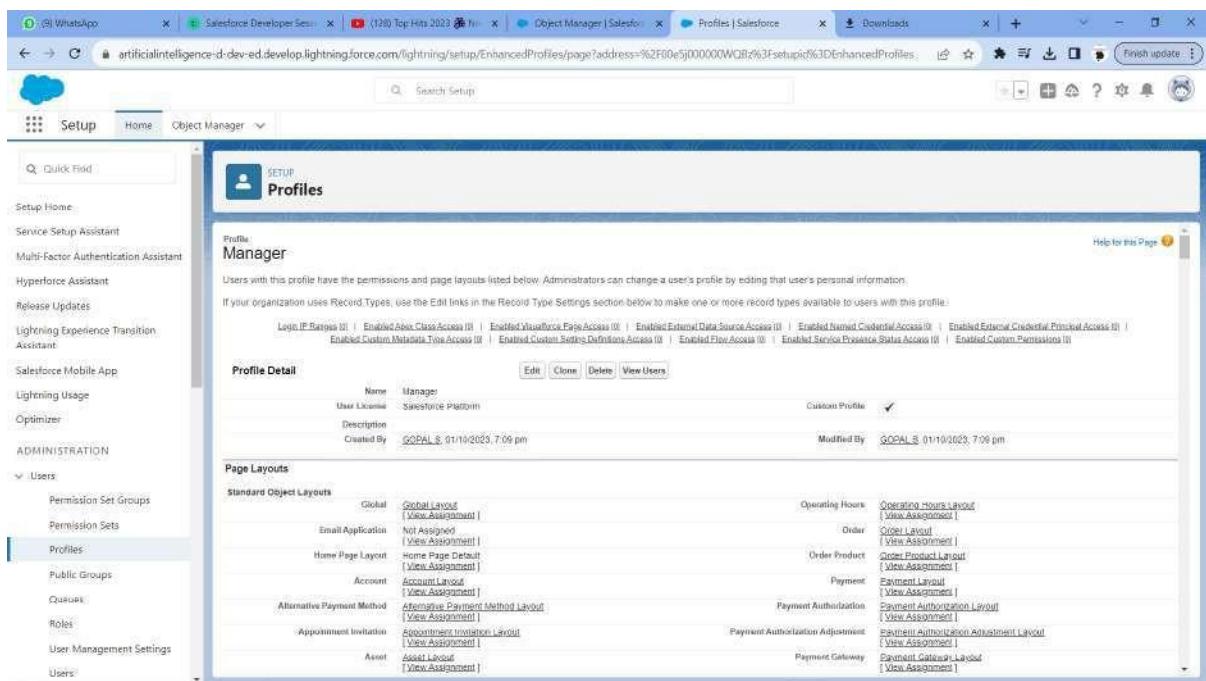
Log In | Logout | Enabled Read-Only Access | Enabled Read-Write Access | Enabled Edit-Only Data Source Access | Enabled Normal Data Source Access | Enabled External Credential Principal Access | Enabled Custom Metadata Type Access | Enabled Custom Settings Definition Access | Enabled Flexi Access | Enabled Service Province Status Access | Enabled Custom Permissions

Profile Detail

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

Page Layouts

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



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SETUP Profiles Manager

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

Custom App Settings

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

Service Provider Access

Tab Settings

Overwrite users' personal tab customizations

Standard Tab Settings

Home	Default On	Leaving	Default On
Accounts	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Alert Settings	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lightning Bolt Solutions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Communication Subscription Channel Types

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

Custom Object Permissions

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

Session Settings

Session Timeout Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

User password expire in: 90 days

Enforce password history: 3 passwords remembered

Minimum password length: 8

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Communication Subscription Channel Types

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

Custom Object Permissions

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

Session Settings

Session Timeout Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

User password expire in: 90 days

Enforce password history: 3 passwords remembered

Minimum password length: 8

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Streaming Channels

User External Credentials

Custom Object Permissions

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

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

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

Enhancement Requests

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User External Credentials

Custom Object Permissions

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

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

User passwords expire in:	80 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

Enhancement Requests

Custom Object Permissions

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

Session Settings

Session Timeout After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

- These 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 answers for password resets
- Require a minimum 1 day password lifetime
- Don't immediately expire links in forgot password emails

The screenshot shows the Salesforce Setup interface with the 'Users' page selected. The main content area displays a list of users with the following columns:

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Edit Login: Adarsh Divya	adarsh	first_divya_123@chatter.salesforce.com		<input checked="" type="checkbox"/>	Sales User
<input type="checkbox"/>	Edit Chatter	Chatter	chatr_001@00000000000000000000000000000000@chatter.salesforce.com		<input checked="" type="checkbox"/>	Guest User
<input type="checkbox"/>	Edit Login: Clinton, Amelia	ameli	amelia@clinton-14800000000000000000000000000000@salesforce.com		<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	Edit SISORAL	SS	sisoral2@gmail.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Edit User Integration	inted	integration@00d10000000000000000000000000000@salesforce.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	Edit User Security	sec	usersecurity@00d10000000000000000000000000000@salesforce.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

Below the table, there are buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'. The bottom of the page features a navigation bar with links for A-Z, and a 'View' dropdown menu.

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Data

Email

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Previous Versions

Search Setup

New User

User Edit Save Save & New Cancel

General Information

First Name: []

Last Name: []

Alias: []

Email: []

Username: []

Nickname: []

Title: []

Company: []

Department: []

Division: []

Role: <None Specified>

User License: Salesforce Integration

Profile: Salesforce API Only System Integrations

Active:

Marketing User:

Office User:

Knowledge User:

Flow User:

Service Cloud User:

Sit.com Contributor User:

Sit.com Publisher User:

VDC User:

Data.com User Type: -None-

Data.com Monthly Addition Limit: Default Limit (900)

Accessibility Mode (Classic Only):

High-Contrast Pallete on Charts:

Load Lightning Pages While Scrolling:

Debug Mode:

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New User

User Edit Save Save & New Cancel

General Information

First Name: SOWMYA

Last Name: bela

Alias: sbsa

Email: 2k20cse179@kiotlec.in

Username: 2k21g@kiot.ac.in

Nickname: User189616771282564528

Title: worker

Company: Kiot bank

Department: []

Division: []

Role: <None Specified>

User License: Salesforce Platform

Profile: Manager

Active:

Marketing User:

Office User:

Knowledge User:

Flow User:

Service Cloud User:

Sit.com Contributor User:

Sit.com Publisher User:

VDC User:

Data.com User Type: -None-

Data.com Monthly Addition Limit: Default Limit (900)

Accessibility Mode (Classic Only):

High-Contrast Pallete on Charts:

Load Lightning Pages While Scrolling:

Debug Mode:

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. The main content area displays the 'User Detail' page for a user named 'sowmyi bala'. The page includes fields for Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, Language, Unrelated Approver, Manager, Receive Approval Request Emails, Federation ID, App Registration: One-Time Password, and App Registration: Salesforce Authenticator. The 'Role' section shows 'Marketing User' as the primary role and 'Salesforce Platform Manager' as the user license. Other sections include 'User Licenses', 'Profile', 'Activity', 'Marketing User', 'Offline User', 'Knowledge User', 'Flow User', 'Service Cloud User', 'Site.com Contributor User', 'Sales.com Publisher User', 'WU User', 'Mobile Push Registrations', 'Device User Type', 'Accessibility Mode (Classic Only)', 'Debug Mode', 'High-Contrast Colors on Charts', 'Load Lightning Pages While Scrolling', and 'Salesforce CRM Content User'.

The screenshot shows a Gmail inbox with 5,318 messages. An email from 'support@salesforce.com' is selected, showing a welcome message from Salesforce. The message content includes a 'Verify Account' button, a URL 'https://artificialintelligence-d-dev-ed-developer.my.salesforce.com', and a placeholder for the username '2k21it@klot.ac.in'. Below the message, a note says 'Again, welcome to Salesforce!'. At the bottom of the screen, a copyright notice reads '© Copyright 2000-2016 salesforce.com, inc. All rights reserved. Various trademarks held by their respective owners.'

Salesforce

Change Your Password

Enter a new password for 2k21it@klot.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: sistem

Change Password

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

Salesforce

Login | Salesforce

Username: 2k21it@klot.ac.in

Password:

Log In

Remember me

[Forgot Your Password?](#)

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

WATCH ON DEMAND:

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Recently Viewed | Bank | Salesfo... +

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

MECW

meCW Bank customers Home

Bank Recently Viewed

Items • Sorted by Bank Name • Updated a few seconds ago

Bank Name

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

DISPLAY DENSITY

✓ Comfy

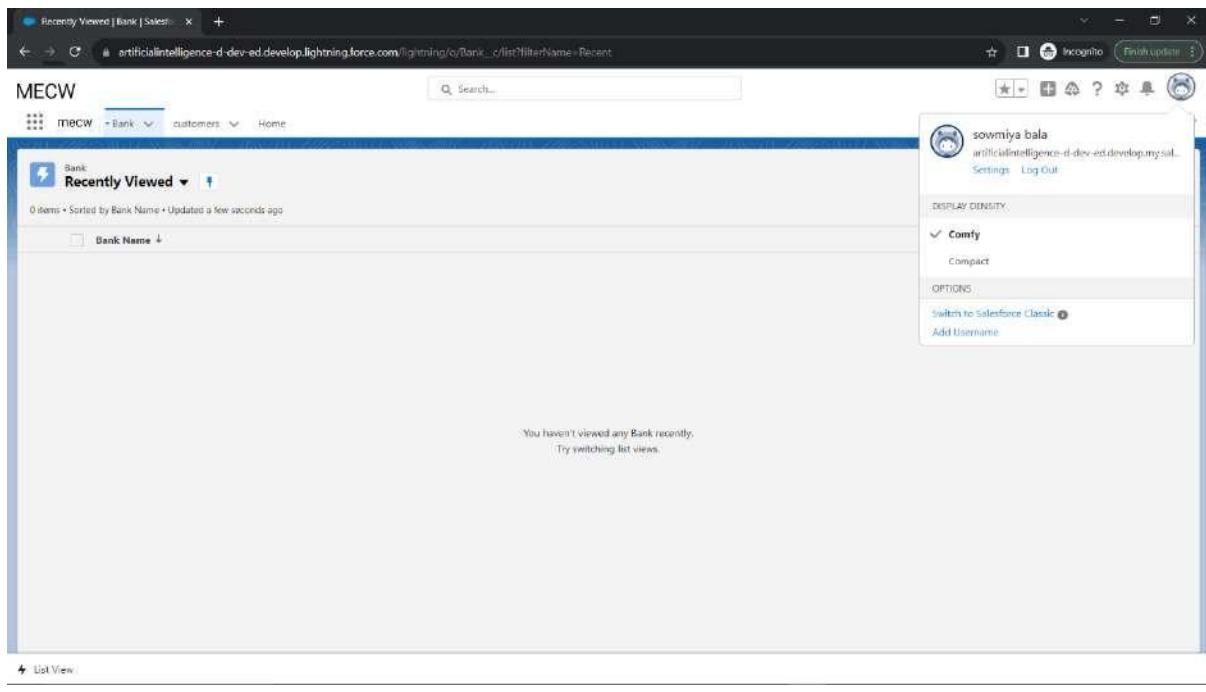
Compact

OPTIONS

Switch to Salesforce Classic

Add Username

List View



New Bank | Salesforce +

artificialintelligence-d-dev-ed-develop.lightning.force.com/lightning/c/Bank__c/new?count=1&nooverride=1&useRecordTypeCheck=1&navigationLocation=LIST_VIEW&buildId=16...

meCW Bank customers Home

Bank Recently Viewed

0 items • Updated a few seconds ago

Bank Name

New Bank

* Required information

Information

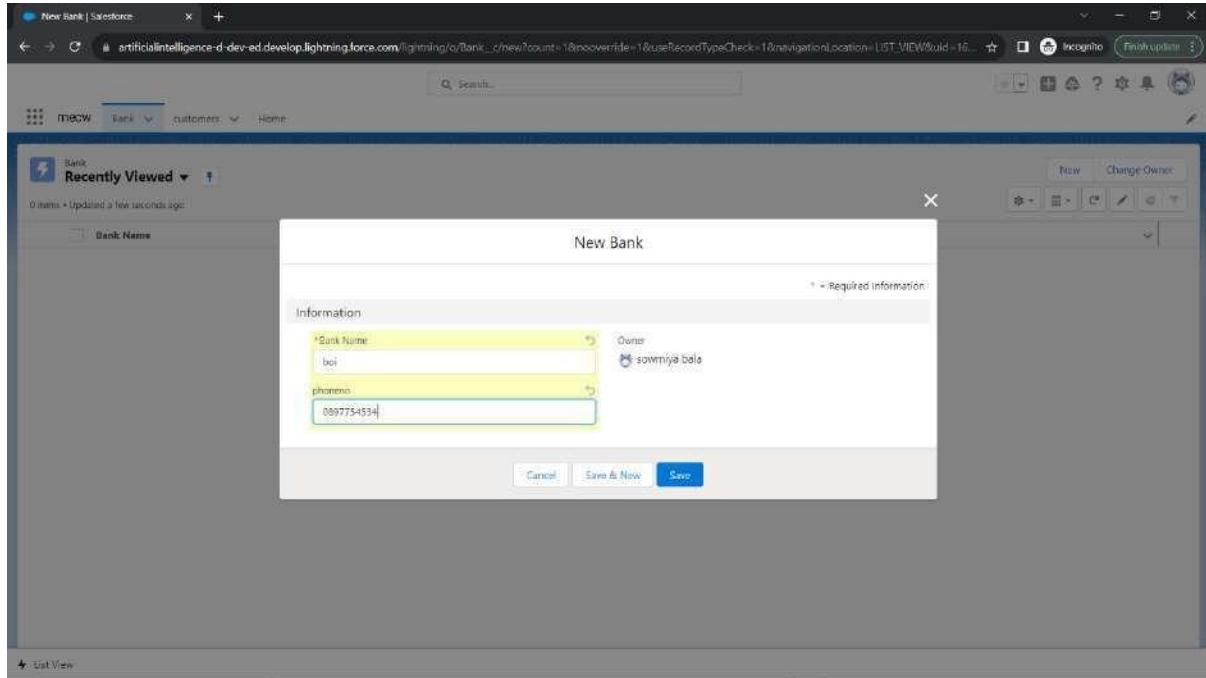
*Bank Name: boi

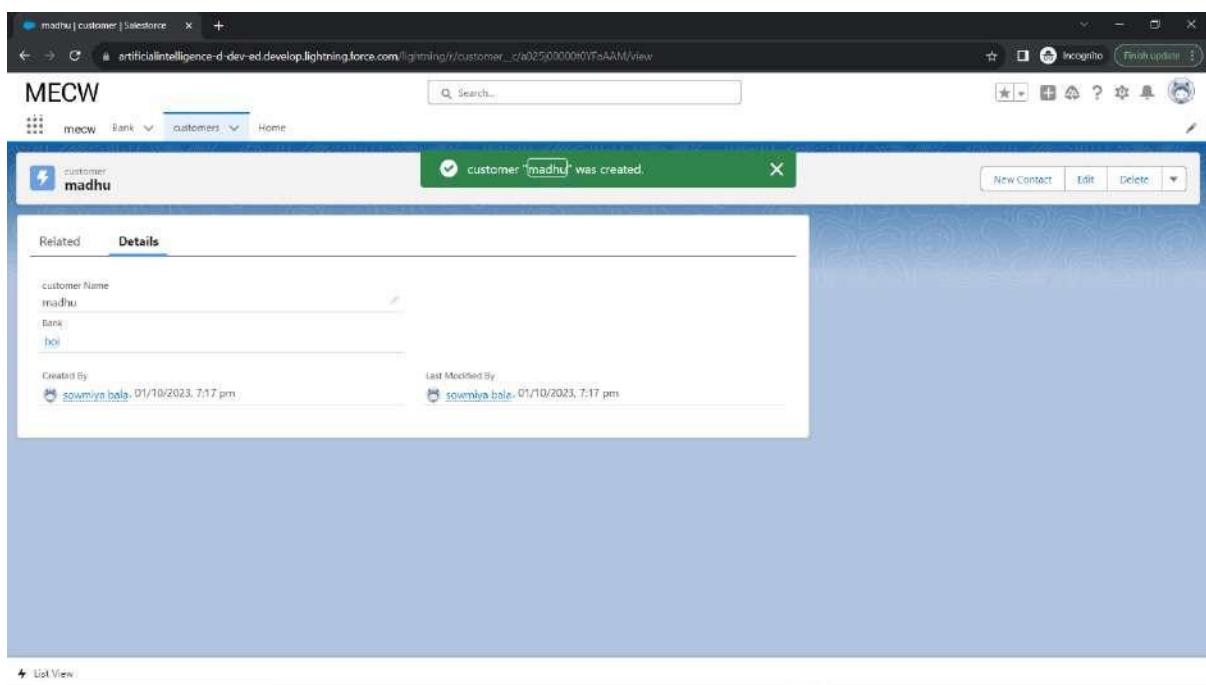
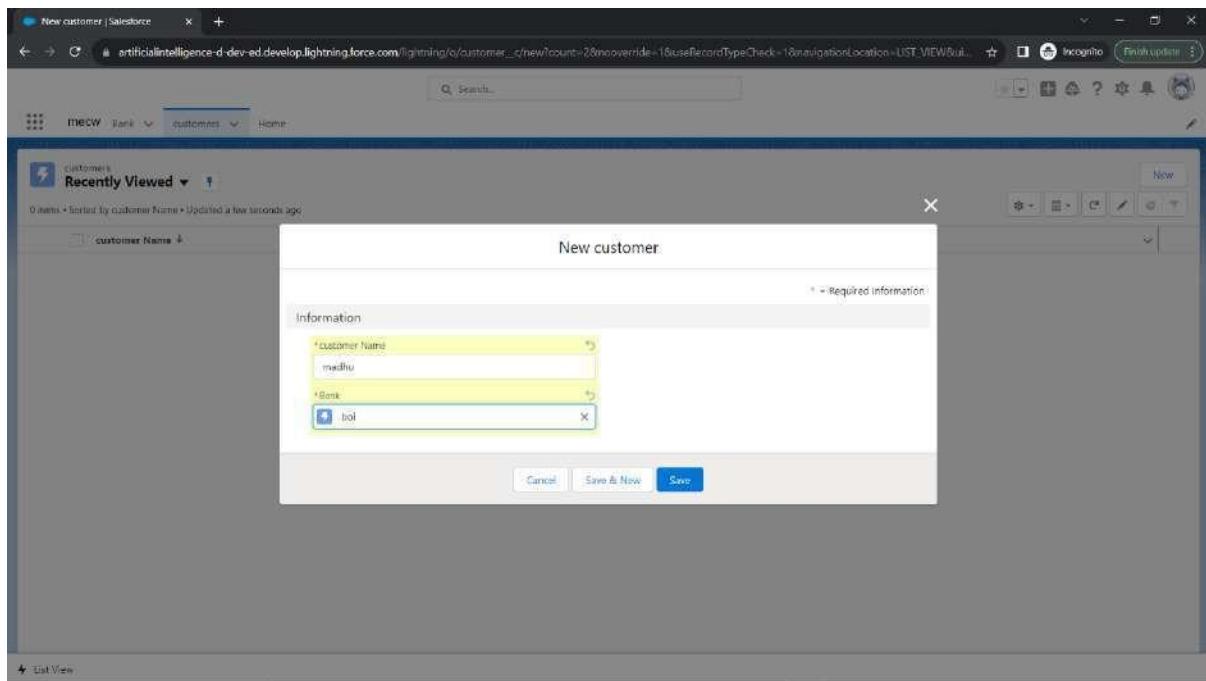
Owner: sowmiya bala

Phone No.: 0897754534

Cancel Save & New Save

List View





The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected. The left sidebar includes links for Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, Administration, and Users. Under the 'Profiles' section of the sidebar, 'Profiles' is selected, along with Public Groups, Queries, Roles, and User Management Settings. The main content area displays a table titled 'Profiles' with columns for Action, Profile Name, and User License. The table lists several profiles, including 'Salesforce API Only System Integrations', 'System Administrator', 'Silver Partner User', 'Standard Manager', 'Standard Platform User', 'Standard User', and 'System Administrator'. The 'User License' column shows values like 'Salesforce Integration', 'Salesforce Partner', 'Salesforce', 'Salesforce Platform', and 'Salesforce'. A 'Custom' checkbox is checked for the 'Standard Platform User' profile. A 'New Profile' button is located at the top left of the table.

The screenshot shows the Salesforce Setup interface with the 'Clone Profile' page open. The left sidebar is identical to the previous screenshot. The main content area has a heading 'Clone Profile' and a sub-instruction 'Enter the name of the new profile'. Below this, a note says 'You must select an existing profile to clone from.' A table shows the selection criteria: 'Existing Profile' (selected), 'Standard Platform User' (User License), and 'Profile Name' (set to 'salesmanager'). At the bottom of the form are 'Save' and 'Cancel' buttons.

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

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 Quotas Roles User Management Settings Users

Profile: salesmanage

Profile Detail

Name: salesmanage	User License: Salesforce Platform	Description:	Created By: QOPAL_S 01/10/2023, 7:19 pm	Modified By: QOPAL_S 01/10/2023, 7:19 pm
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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

Help for this Page

Log In Status (1) | Enabled Apex Class Access (1) | Enabled Visualforce Page Access (1) | Enabled External Data Source Access (1) | Enabled External Credential Access (1) | Enabled External Credential Principal Access (1) | Enabled Custom Metadata Type Access (1) | Enabled Custom Settings Definition Access (1) | Enabled Flow Access (1) | Enabled Service Pipeline Status Access (1) | Enabled Custom Permissions (1)

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

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Profile Edit

Profile Edit

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

Custom App Settings

Module	Visible	Default	Module	Visible	Default
Analytics Studio (standard_Analytics)	<input type="checkbox"/>	<input checked="" type="radio"/>	Platform (standard_Platform)	<input type="checkbox"/>	<input checked="" type="radio"/>
App Launcher (standard_AppLauncher)	<input type="checkbox"/>	<input checked="" type="radio"/>	WDC (standard_Work)	<input type="checkbox"/>	<input checked="" type="radio"/>
File (standard_File)	<input checked="" type="checkbox"/>	<input type="radio"/>			

Service Provider Access

Tab Settings

standard Tab settings

Home Default On

Logging: Default On

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Profiles

Custom Object Permissions

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

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

Observe secret answer for password resets:

Require a minimum 1 day password lifetime:

Don't immediately expire links in forgot password emails:

Save | Save & New | Cancel

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

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 Quotas Roles User Management Settings Users

Profiles

Custom Object Permissions

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

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

User passwords expire in: 90 days

Enforce password history: 2 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

Observe secret answer for password resets:

Require a minimum 1 day password lifetime:

Don't immediately expire links in forgot password emails:

Save | Save & New | Cancel

Salesforce Developer Session / Users | Salesforce

New User

User Edit

General Information

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

Role: <None Specified>

User License: Salesforce Integration

Profile: Salesforce API Only System Integrations

Active:

Marketing User:

Office User:

Knowledge User:

Flow User:

Service Cloud User:

Site.com Contributor User:

Site.com Publisher User:

VDC User:

Data.com User Type: -None-

Data.com Monthly Addition Limit: Default Limit (500)

Accessibility Mode (Classic Only):

High-Contrast Palms on Charts:

Load Lightning Pages While Scrolling:

Debug Mode:

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Save Save & New Cancel

Setup Home Object Manager

Q user

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New User

User Edit

General Information

First Name	madhu
Last Name	b
Alias	mb
Email	2k20cse179@kiot.ac.in
Username	2k20cse179@kiot.ac.in
Middle Name	User189616842426954192
Title	worker
Company	kiot bank
Department	Sales
Division	

Role: <None Specified>

User License: Salesforce Platform

Profile: salesmanager

Active:

Marketing User:

Office User:

Knowledge User:

Flow User:

Service Cloud User:

Site.com Contributor User:

Site.com Publisher User:

VDC User:

Data.com User Type: -None-

Data.com Monthly Addition Limit: Default Limit (500)

Accessibility Mode (Classic Only):

High-Contrast Palms on Charts:

Load Lightning Pages While Scrolling:

Debug Mode:

Help for this Page

Save Save & New Cancel

Setup Home Object Manager

Q user

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

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Datacom

Prospector Users

Service

Embedded Service

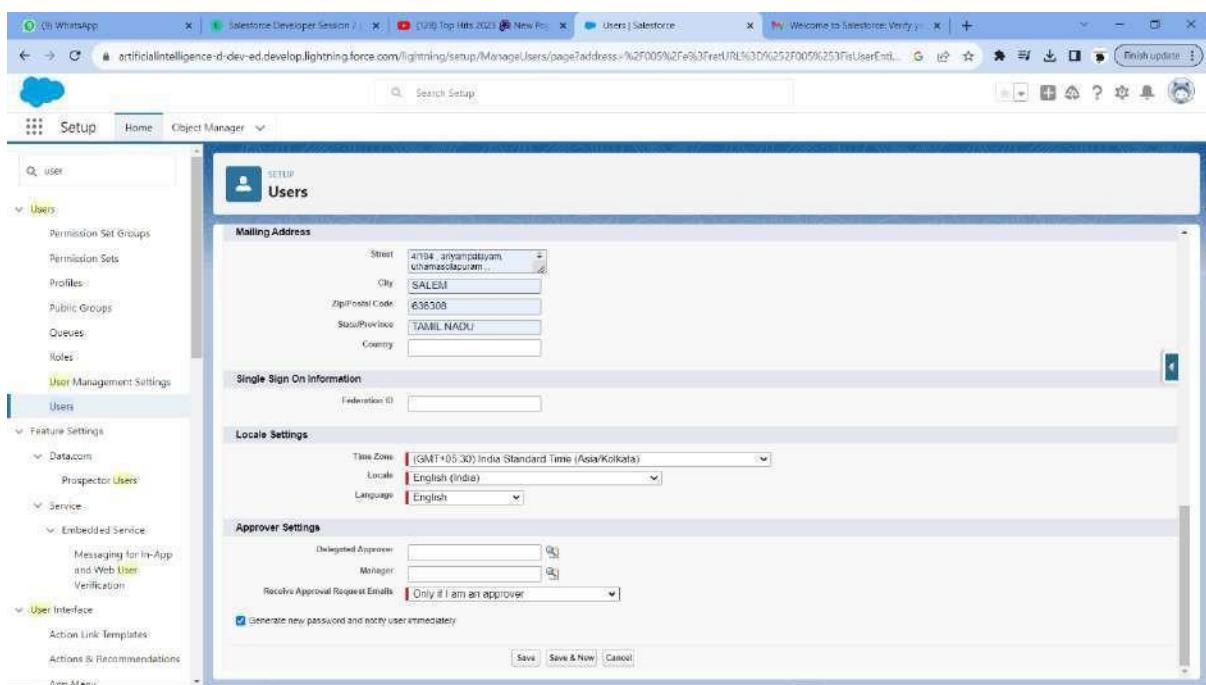
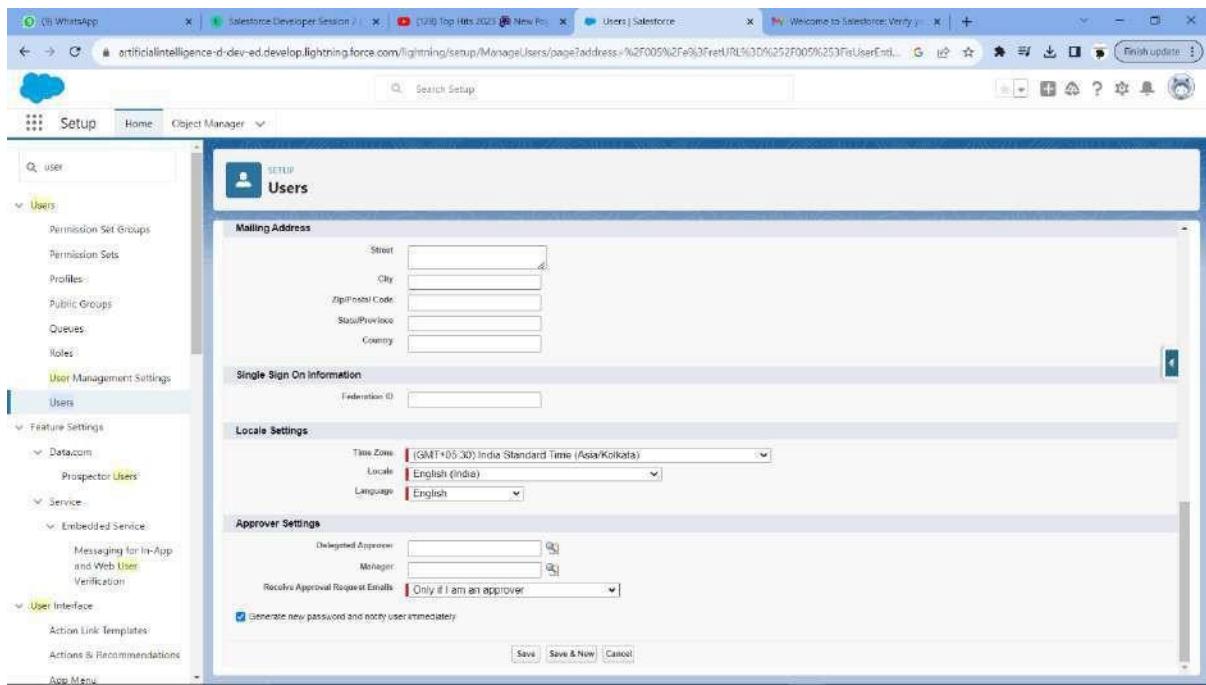
Messaging for In-App and Web User Verification

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Action Link Templates

Actions & Recommendations

App Menu



The screenshot shows the Salesforce Setup interface with the 'User Management Settings' section selected. Under 'Users', the 'Prospector' tab is active, showing a list of users including 'madhu b'. The main panel displays the 'User Detail' for 'madhu b', showing fields like Name, Alias, Email, Nickname, Title, Company, Department, Address, Phone, Fax, and various user roles and permissions.

The screenshot shows a Gmail inbox with 5,318 messages. A prominent message from 'Welcome to Salesforce!' is displayed, containing a verification link: <https://artificialintelligence-d-dev-ed.develop.my.salesforce.com>. The message also includes the recipient's username: '2k20osif@kiel.ac.in'.

Change Your Password | Salesfo... +

artificialintelligence-d-dev-ed-develop.my.salesforce.com/u/system/security/ChangePassword?retURL=%2fhome%2fhome.jsp&fromFrontdoor=1&setupId=ChangePa... Incognito [F] Finish update



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 01/30/2023, 7:24 pm.

Recently Viewed | Bank | Salesfo... +

artificialintelligence-d-dev-ed-develop.lightning.force.com/lightning/c/Bank__c/list?filterName=Recent Incognito [F] Finish update

MECW

Bank Recently Viewed

0 items • Updated a few seconds ago

Bank Name

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

List View

Recently Viewed | customers | +

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

MECW

MECW Bank customers Home

Search...

Recently Viewed

Items • Updated a few seconds ago

customer Name

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

List View

This screenshot shows the Salesforce Lightning interface. The top navigation bar includes links for 'Recently Viewed', 'customers', 'Bank', 'customers', and 'Home'. A search bar is at the top right. Below the header is a sidebar with 'Recently Viewed' and a dropdown menu. The main content area displays a message stating 'You haven't viewed any customers recently... Try switching list views.' There is a link to 'List View' at the bottom left of the content area.

WhatsApp

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

Setup

Home Object Manager

Search Setup

Permission Sets

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	Licenses
<input type="checkbox"/>	Allow 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 cards and documents that the user is a Sales Cloud or Service Cloud user.	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 Commerce.	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Admin	Access agent features in Service Cloud Voice contact centers that use Amazon Commerce.	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Agent	Access agent features in Service Cloud Voice contact centers that use Amazon Commerce.	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Supervisor	Access supervisor features in Service Cloud Voice contact centers that use Amazon Commerce.	Service Cloud Voice User
<input type="checkbox"/>	Experience Profile Manager	Access supervisor features in Service Cloud Voice contact centers that use Amazon Commerce.	Salesforce
<input type="checkbox"/>	Facility Manager	Let's users create, read, edit, and delete instances of locations.	Facility Manager
<input type="checkbox"/>	Field Service Mobile	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"/>	Merchandise User	Read access to all entities managed 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 Operator Manager	Access to all features enabled by Order Management.	Lightning Order Management User
<input type="checkbox"/>	Order Management Shopper	Unlimited access to Order Management features for Staff Services.	Lightning Order Management User

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

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

This screenshot shows the Salesforce Setup interface. The left sidebar includes 'User Management Settings', 'Users', 'Feature Settings', 'Datacom', 'Prospector', 'Service', 'Embedded Service', 'Messaging for In-App and Web User', 'Verification', 'User Interface', 'Action Link Templates', and 'Actions & Recommendations'. The main content area is titled 'Permission Sets' and displays a table of permission sets. The table columns are 'Action', 'Permission Set Label', 'Description', and 'Licenses'. The table lists various permission sets such as 'Buyer', 'Buyer Manager', 'CRM User', 'Commerce Admin', etc. At the bottom, there are navigation links for 'New', 'Selected', 'New', 'Previous', 'Next', and 'Page: 1 of 2'.

Stcp2:

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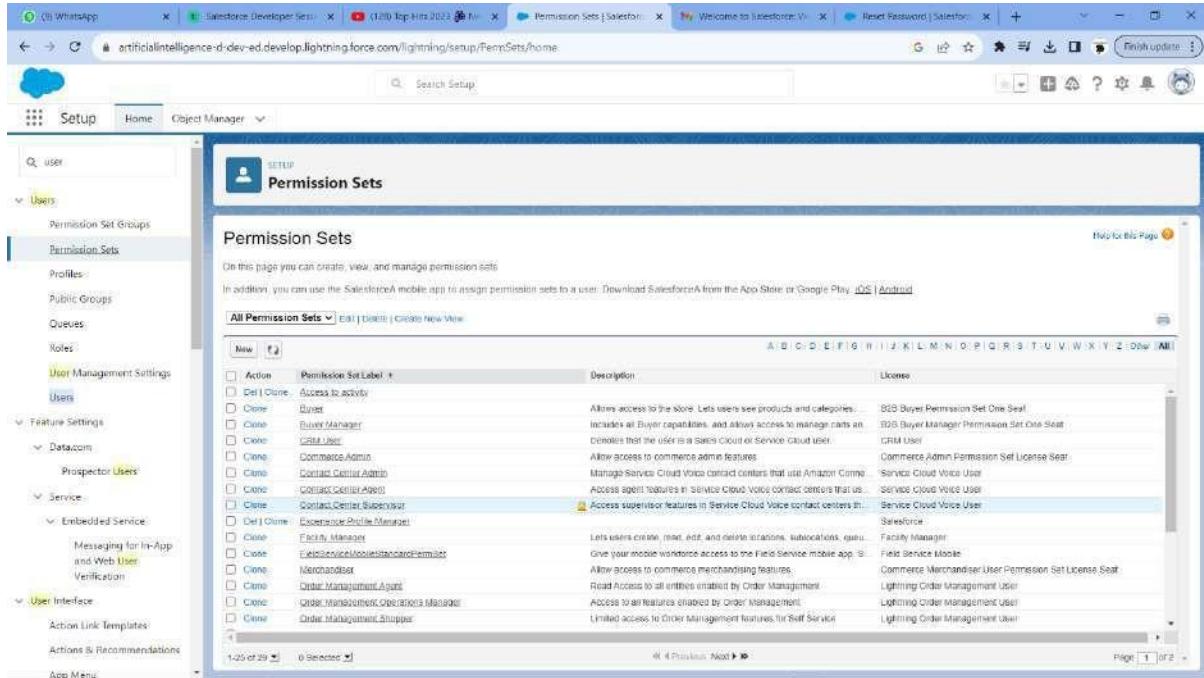
íccoíd3 o w → cdbQIJ3 cíBwitk"3 cí B.

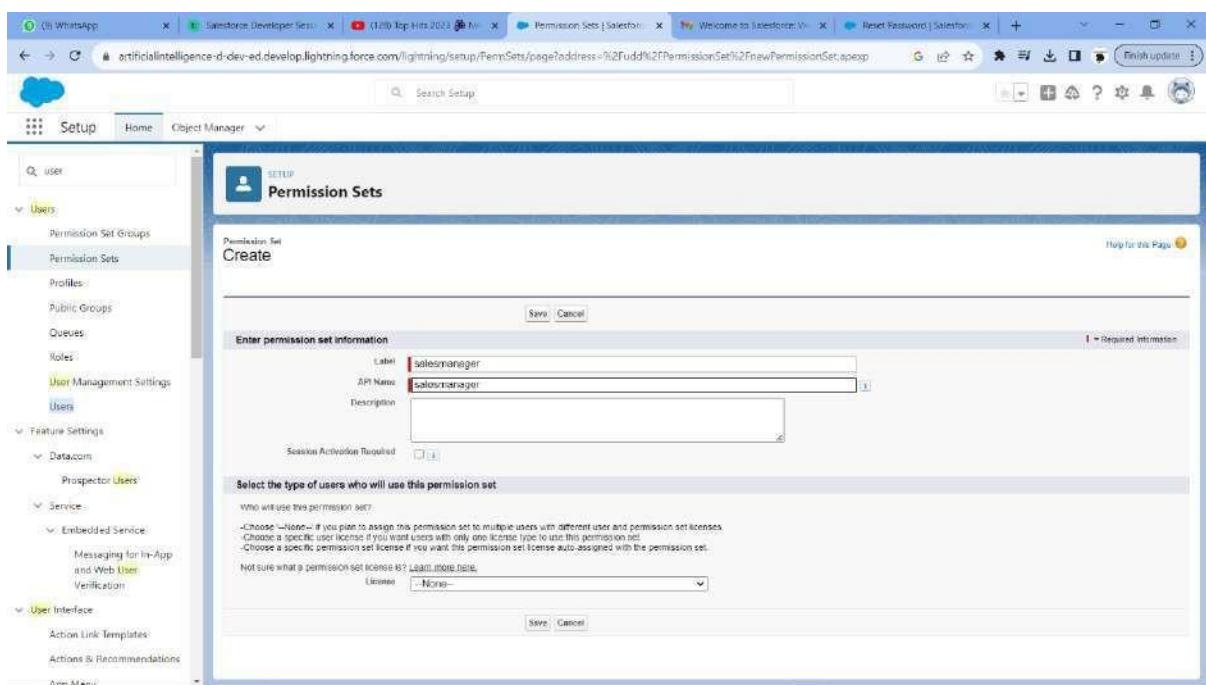
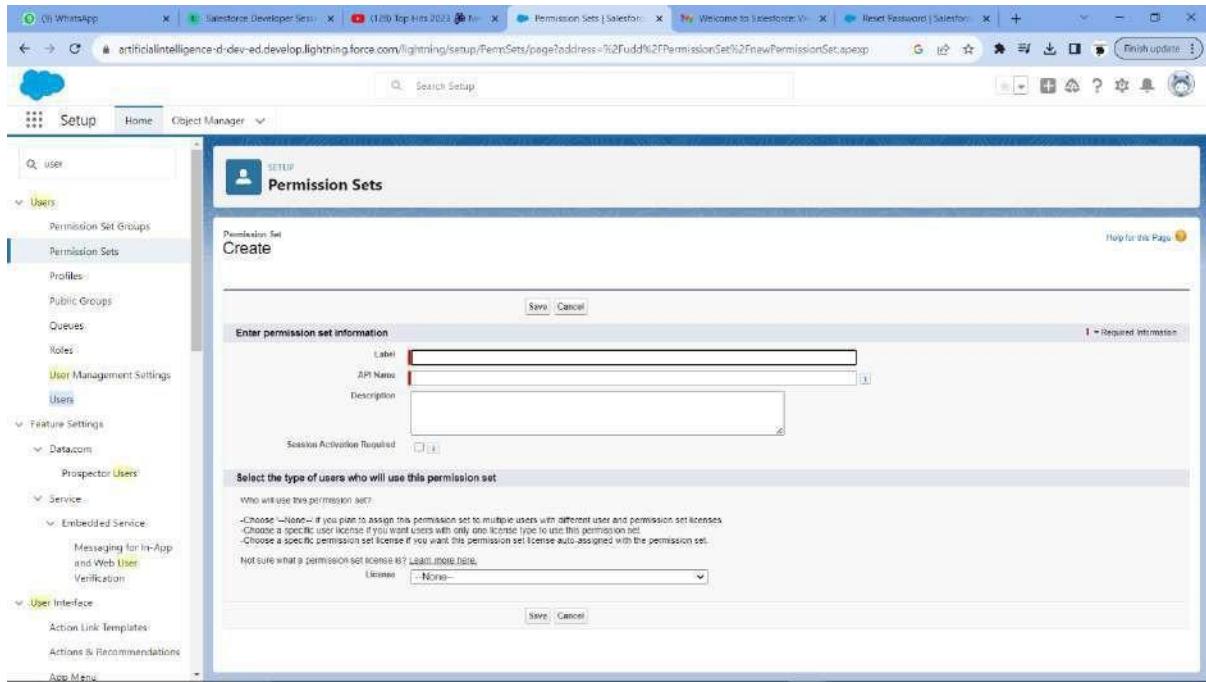
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o w → cdbQU3 cí Aaí c 3 kaícdwitk 3

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 - Scttkcoíga \rightarrow izatio \rightarrow -widcdcra"lt3 roítkc
Acco" \rightarrow tobjcctto"Pí:atc"toc \rightarrow 3 "íctkat
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Salesforce Developer Setup

Permission Sets | Salesforce

Welcome to Salesforce! | Reset Password | Salesforce

Finish update

Setup Home Object Manager

Search Setup

User

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Datacom

Prospector Users

Service

Embedded Service

Messaging for In-App and Web User Verification

User Interface

Action Link Templates

Actions & Recommendations

App Menu

Permission Set

salesmanager

Video Tutorial (HTML for this Page)

Find Settings Close Delete Edit Properties Manage Assignments

API Name salesmanager

Namespace Prefix

Created By QOBAL_S_01/10/2023, 7:29 pm

Session Activation Required

Last Modified By QOBAL_S_01/10/2023, 7:29 pm

Apps

Assigned Apps

Assigned Connected Apps

Object Settings

App Permissions

APEX Class Access

Visualforce Page Access

External Data Source Access

EWK Access

Learn More

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.

EWK Access

Permissions to execute Flows.

Salesforce Developer Setup

Permission Sets | Salesforce

Welcome to Salesforce! | Reset Password | Salesforce

Finish update

Setup Home Object Manager

Search Setup

User

Users

Permission Set Groups

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Profiles

Public Groups

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Permission Set

salesmanager

Video Tutorial (HTML for this Page)

Find Settings Close Delete Edit Properties Manage Assignments

Object Settings

Object Settings

Object Name	Object Permissions	Total Fields	Tab Settings
Accounts	No Access	40	—
AI Insights Reports	No Access	—	—
AI Report Insights	No Access	—	—
AI Insights Platform Methods	No Access	27	—
API Analytics Event Stores	No Access	14	—
App Analytics Query Requests	No Access	—	—
Application Usage Assessments	No Access	—	—
Appointment Calendars	No Access	8	—
Appointment Invitations	No Access	17	—
Appointment Schedule Appointments	No Access	—	—
Appointment Schedule Logs	No Access	—	—
Appointment Topic Time Slots	No Access	6	—
Asset Actions	No Access	50	—
Asset Action Sources	No Access	18	—
Asset Responses	No Access	10	—
Assets	No Access	42	—
Asset Status Reports	No Access	11	—

Screenshot of the Salesforce Permission Sets page for the 'salesmanager' set.

The 'Object Permissions' section shows the following settings:

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

The 'Field Permissions' section shows the following settings:

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

Screenshot of the Salesforce Permission Sets page for the 'salesmanager' set.

The 'Object Permissions' section shows the following settings:

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 shows the following settings:

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

Salesforce Developer Setup

Permission Sets | Salesforce

Welcome to Salesforce!

Finish update

Setup Home Object Manager

Search Setup

User

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Datacom

Prospector Users

Service

Embedded Service

Messaging for In-App and Web User Verification

User Interface

Action Link Templates

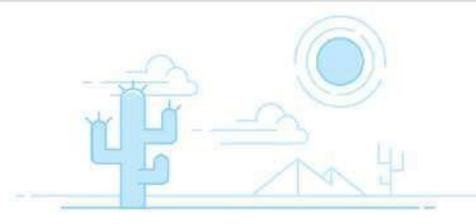
Actions & Recommendations

App Menu

SETUP > PERMISSION SET: SALESMANAGER

salesmanager

Current Assignments



No assignments defined.

Add Assignment

Salesforce Developer Setup

Permission Sets | Salesforce

Welcome to Salesforce!

Finish update

Setup Home Object Manager

Search Setup

User

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

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Users

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Prospector Users

Service

Embedded Service

Messaging for In-App and Web User Verification

User Interface

Action Link Templates

Actions & Recommendations

App Menu

lightning.force.com

SELECT USERS TO ASSIGN

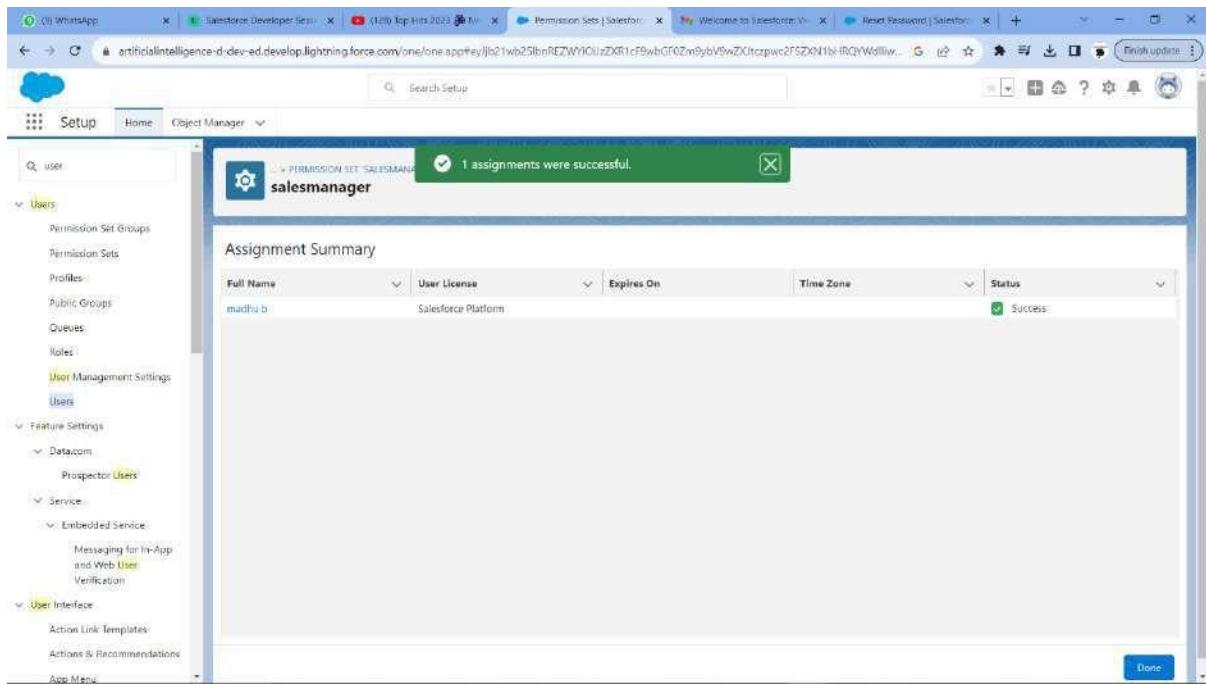
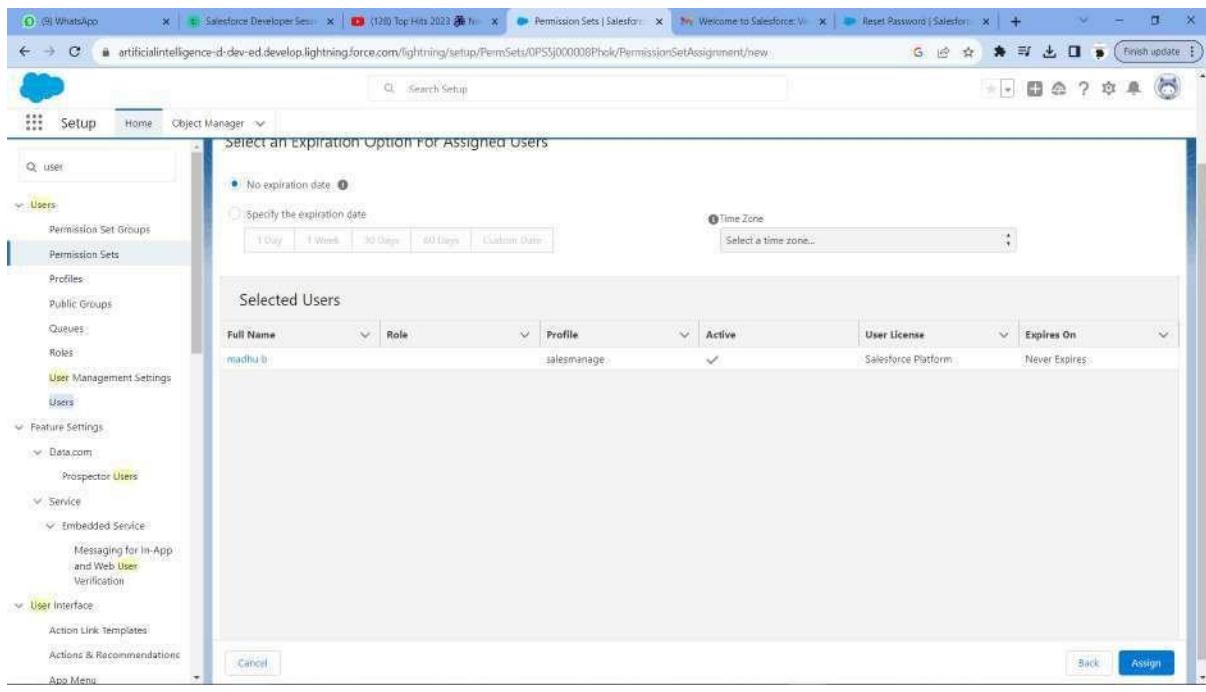
All Users

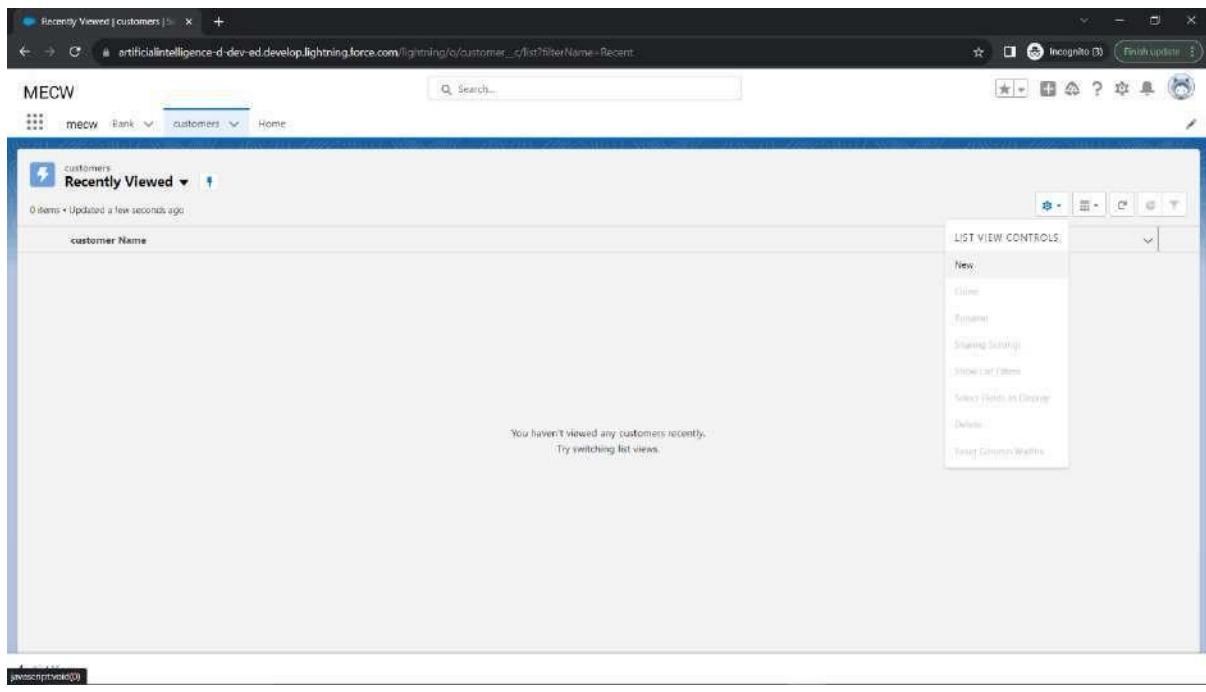
1 item selected

Full Name	Role	Profile
Amelia Ellington	Force.com - App Subscription User	Force.com - App Subscription User
Chatter Expert	Chatter Free User	Chatter Free User
Diya Adarna	LMS User	LMS User
GOPAL S	System Administrator	System Administrator
Integration User	Analytics Cloud Integration User	Analytics Cloud Integration User
madhu-b	salesmanag	salesmanag
Security User	Analytics Cloud Security User	Analytics Cloud Security User
soveniyyr bala	Manager	Manager

Search this list...

Cancel Next





«.. S"ppozctkcícaíc2U3 cí3 a→dtkcQaíc
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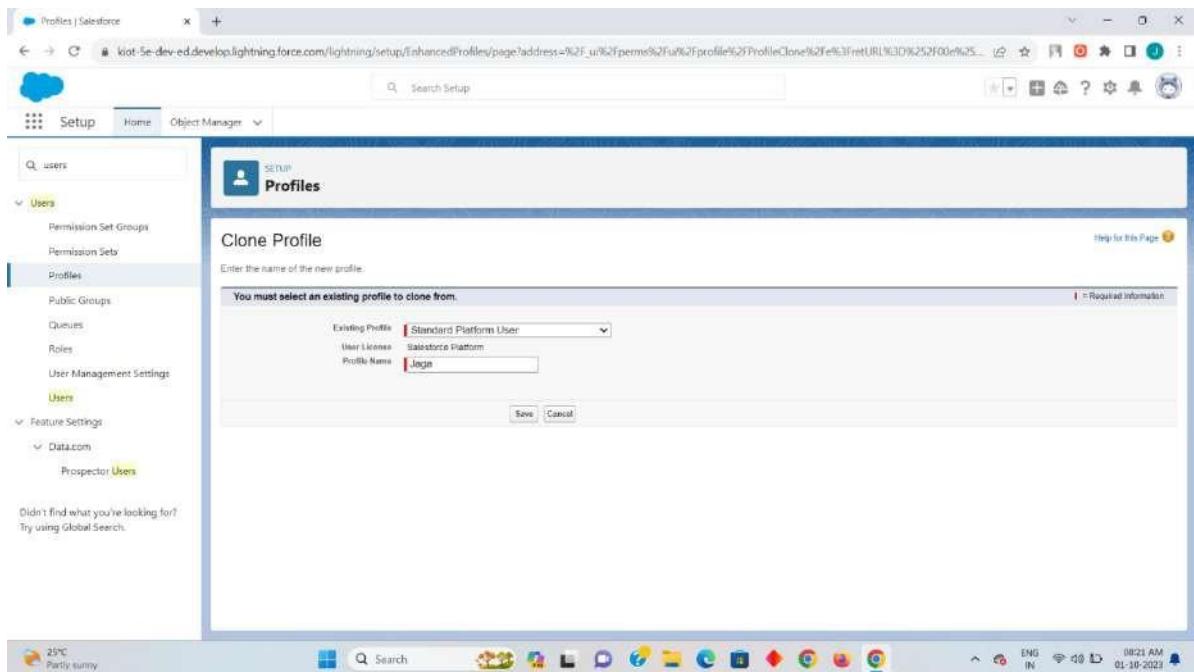
Sct "p-q" ic e3 caíck [píorilc]

The screenshot shows the Salesforce Setup interface for managing Profiles. The left sidebar navigation includes 'Setup' (selected), 'Home', and 'Object Manager'. Under 'Users', 'Profiles' is selected. The main content area displays a table titled 'Profiles' with columns for 'Action', 'Profile Name', 'User License', and 'Custom'. The table lists various profiles such as 'Analytics Cloud Integration User', 'Analytics Cloud Security User', 'Authenticated Website', etc. A search bar at the top right says 'Search Setup'.

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 Security User	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Chatter External User	Chatter External	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Chatter Free User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Chatter Moderate User	Chatter Moderate	<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 checked="" 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"/>

Stcp2:

Cliceo→tkc→cwtocícatca→lwpforilcalog
witktkclabcla→dApi



Hc|cIkadÉ adcitÉ Qpíorilc→iaÉ ca3 Jaga
a→dtkccxi3 ti→gpíorilca3 Sta→daídPlatrocí É U3 cí.

Stcp«:

Now click on the edit button to follow the steps to object settings. A note that click on the : icon option. Article that click on the : icon.

The screenshot shows the Salesforce Setup interface under the Profiles section. On the left, there's a sidebar with navigation links like Home, Object Manager, and various User-related options. The main content area is titled 'Profiles' and shows the 'Profile Detail' for 'Jaga'. The profile has the following details:

- Name:** Jaga
- User License:** Salesforce Platform
- Description:** (empty)
- Created By:** Jaganesh S (01/10/2023, 6:21 am)
- Modified By:** Jaganesh S (01/10/2023, 6:21 am)

Page Layouts section:

Standard Object Layouts	Operating Hours	Record Types
Global (Edit, Create) [View Assignment]	(View Assignment)	Opportunity (Edit, Create) [View Assignment]
Email Application (Edit, Create) [View Assignment]	Order (Edit, Create) [View Assignment]	Order Product (Edit, Create) [View Assignment]
Home Page Layout (Edit, Create) [View Assignment]	Order Payout (Edit, Create) [View Assignment]	Payment (Edit, Create) [View Assignment]
Account (Edit, Create) [View Assignment]	Payment Authorization (Edit, Create) [View Assignment]	Payment Authorization Approval (Edit, Create) [View Assignment]
Alternative Payment Method (Edit, Create) [View Assignment]	Payment Authorization Adjustment (Edit, Create) [View Assignment]	Payment Authorization Adjustment Approval (Edit, Create) [View Assignment]
Appointment Invitation (Edit, Create) [View Assignment]		

The screenshot continues from the previous one, showing the 'Profiles' page in the Setup interface. The left sidebar remains the same. The main content area now includes the 'Custom Object Permissions' and 'Session Settings' sections.

Custom Object Permissions section:

Object	Read	Create	Edit	Delete	View All	Modify All
Communication Subscription Contents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication Subscription Timings	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Address	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Contact	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Email	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Session Settings section:

- Session Times Out After: 2 hours of inactivity
- Enable different Experience Cloud login policies for employees: Separate Experience Cloud site and Salesforce login authentication for employees.
- Allow login IP restrictions: Skip employee device activation during Experience Cloud site login.
- Session Security Level Required at Login: None

Profiles | Salesforce

http://klot-se-dev-ed.lightning.force.com/lightning/setup/EnhancedProfile/page?address=%2F00e5j00000WQ2O%2Fe%3FrelURL%3D%252F00e5j00000WQ2O%253Fsetupid...

Setup Home Object Manager Search Setup

Q. User

Users

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

User

- Feature Settings
- Data.com
- Prospector Users

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

SETUP Profiles

Customize your user profile settings here.

Communication Subscription Permissions

Communication Subscription	Read	Create	Edit	Delete	View All	Modify All
Conversations	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Timings	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Addresses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Contacts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Emails	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Locations

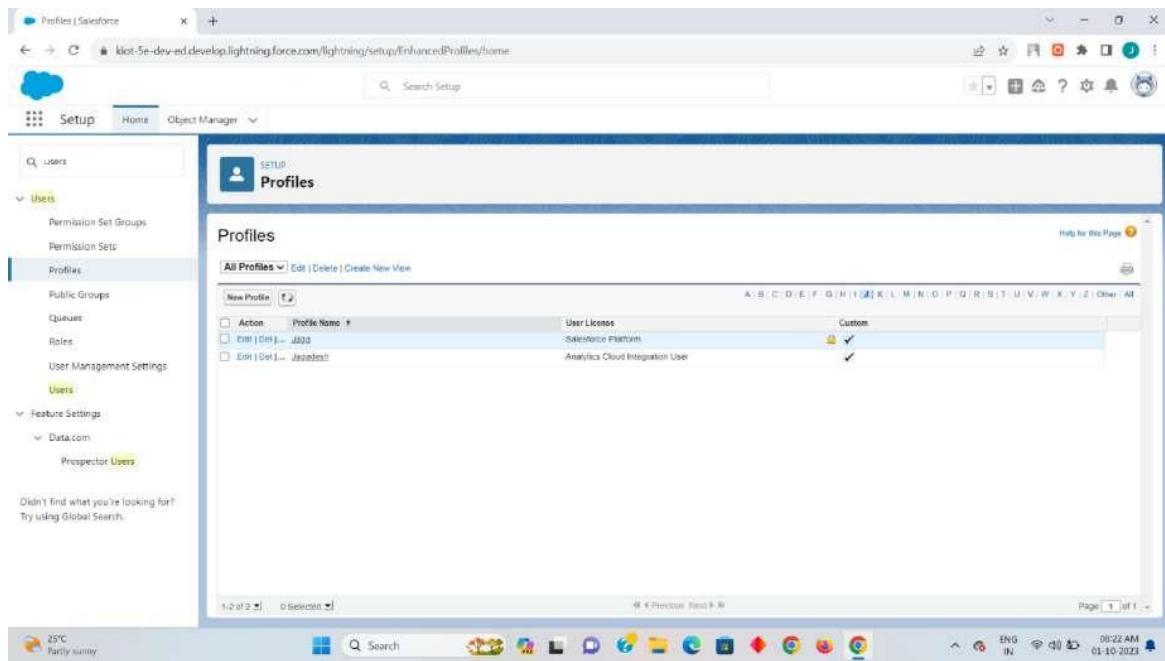
Location	Read	Create	Edit	Delete	View All	Modify All
Sales	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Marketing	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer Service	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Product Management	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
System	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Party Contracts

Party Contract	Read	Create	Edit	Delete	View All	Modify All
Opportunities	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Leads	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Accounts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contacts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Opportunity Line Items	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lead Source	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Case	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Task	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Event	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Meeting	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Opportunity Stage	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Opportunity Type	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Opportunity Product	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Opportunity Line Item Type	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Opportunity Line Item Status	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Opportunity Line Item Category	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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Stcp4

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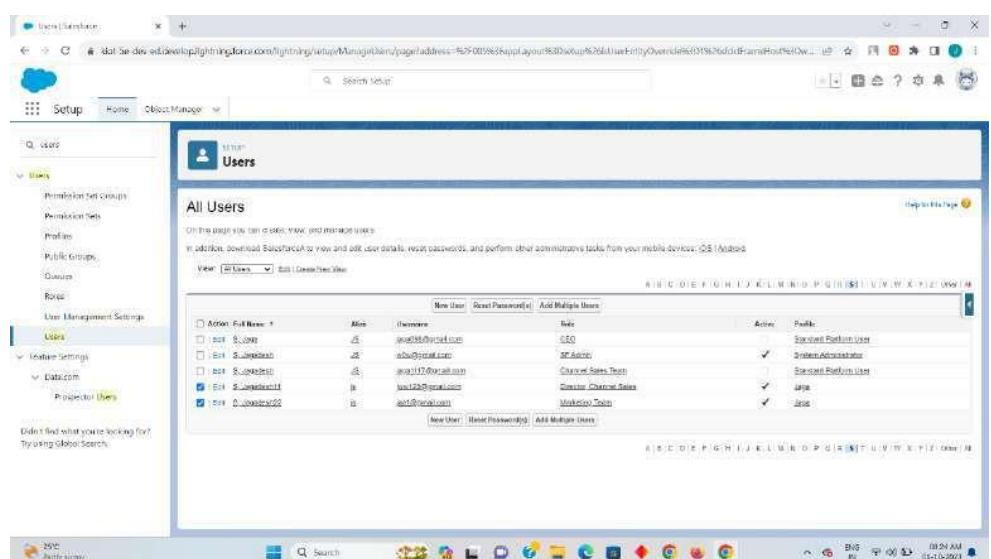
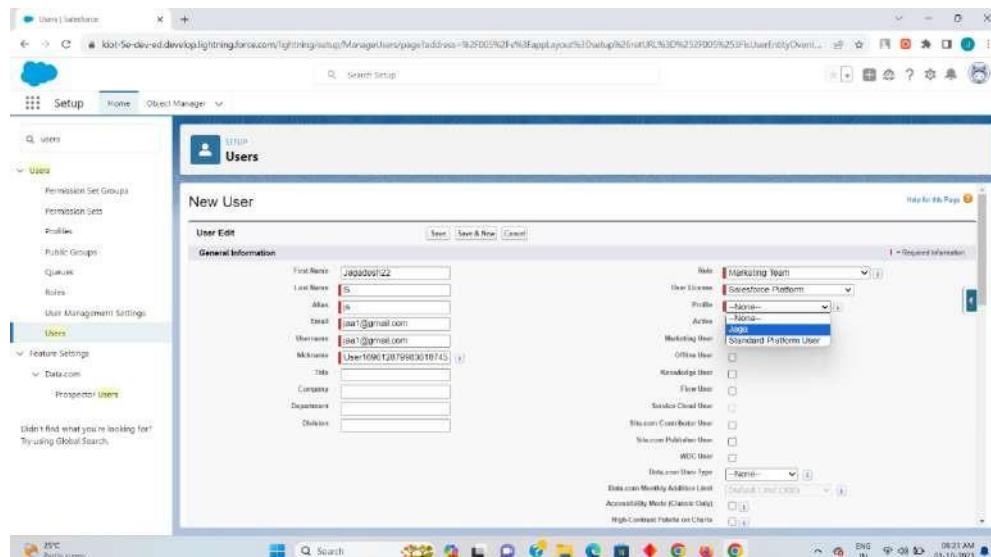
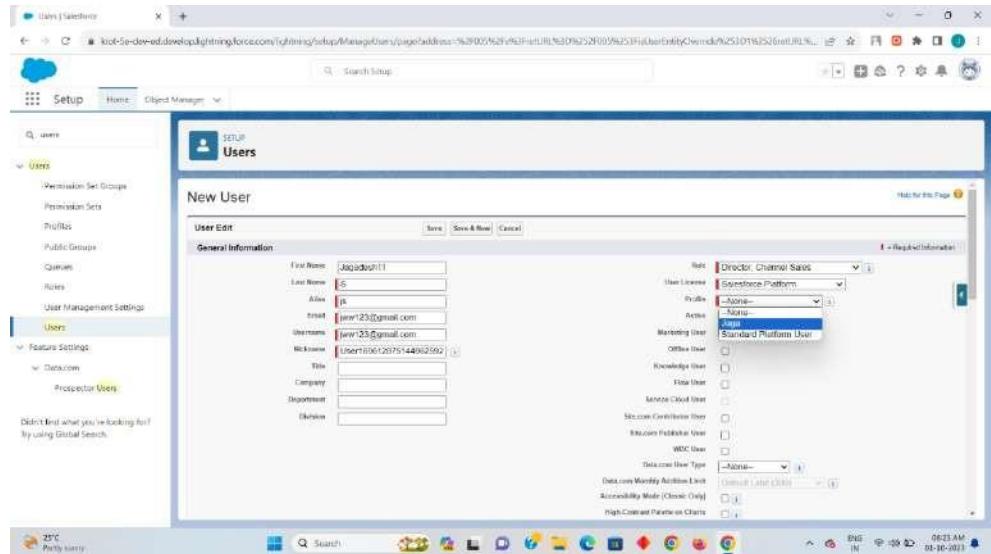


Stcp5:

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cícacatcd→tkc3tcp2. o→cctkco→c"3cíka3
bcc→cícacatcdcliceo→tkc3a:c&→cw3otkat
Qo"ca→cícacatktc3cco→d"3cía→dtkcíctkc
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The screenshot shows the Salesforce Setup interface with the following details:

- Page Header:** Users | Salesforce
- Page URL:** /iot-5e-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/home
- Page Title:** Users
- Left Sidebar:** Setup, Home, Object Manager, users (selected), Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings (selected), Users (selected), Feature Settings, Data.com, Prospectors Users.
- Content Area:**
 - Section:** All Users
 - Description:** On this page you can create, view, and manage users.
 - Links:** View: All Users, Edit, Create New View, Help for this Page.
 - Table:** A list of users with columns: Action, Full Name, Alias, Username, Role, Active, Profile. The table includes rows for Chatter_Essential, Chatter, Sales_Professional, Sales, S_Jag, S_Jagadeesh, S_Jagadeesh, User_Integration, and User_Security.
 - Buttons:** New User, Reset Password(s), Add Multiple Users.
- Bottom:** Navigation links (A-Z), Search bar, and system status bar (25°C Party sunny, ENG IN, 08:22 AM, 01-10-2023).



NowQo"ca→píc:icwQo"ítwo"3 cítkatQo"ka:ccícatcdi→
É Q3 idcIkadcícatctkctwo
"3 cí3 aJagadc3 k11a→dJagadc3 k22a3 a
diíctoícka→cl3alc3witktkcÉ aíecti→g tcaÉ .

Stcp6:

Nowtkctwo"3 cíá3bcc→cícatcdwitktkc
píorlc3otkattwo"3 cíca→pcíroíÉ tkc
Cícatc, Rcad, Edita→d:icwo→botktkc"3 cí.
Soa3pcítkcgi:c→ta3ewc→ccdtoallocatca
3pcciricaccc33a3dclctco→o→c"3círoítkat
wc→ccdcícatcapcíÉ i33io→3ctroío→c"3cí 3oitca→cícatcda3

3ct"p-q"ice 3caíck[pcíÉ i33io→3ct]→icw-
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objcct 3ctti→g3-acco"→t3.

Permission Sets | Salesforce

https://kiot-5c-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.

Permission Sets

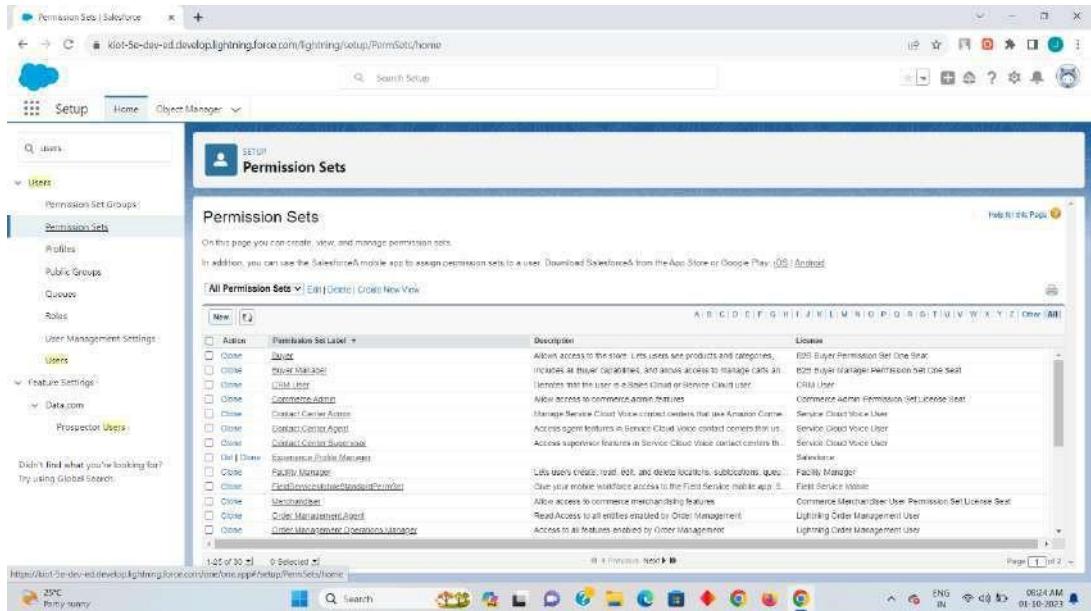
On this page you can create, view, and manage permission sets. In addition, you can use the Salesforce mobile app to assign permission sets to a user. Download Salesforce from the App Store or Google Play.

All Permission Sets | Edit | Delete | Create New

New

Action	Permission Set Label	Description	Licenses
<input type="checkbox"/>	None	None	0
<input type="checkbox"/>	Buyer	Allow access to the store. Lets users see products and categories, includes all buyer capabilities, and allows access to manage carts and items that the user is a buyer client or Service Cloud user.	0(B) Buyer Permission Set One Seat
<input type="checkbox"/>	CRM User	Allow access to CRM features.	0(CRM) CRM User
<input type="checkbox"/>	Commerce Admin	Manage Service Cloud Voice contact centers like Amazon Connect.	0(M) Commerce Admin Permissions Set One Seat
<input type="checkbox"/>	Commerce Contact Agent	Access agent features in Service Cloud Voice contact centers that use Amazon Connect.	Service Cloud Voice User
<input type="checkbox"/>	Commerce Contact Supervisor	Access supervisor features in Service Cloud Voice contact centers that use Amazon Connect.	Service Cloud Voice User
<input type="checkbox"/>	Customer Experience Manager	Allows users to create, read, edit, and delete locations, sublocations, and regions.	Salesforce
<input type="checkbox"/>	Facility Manager	Give your mobile workforce access to the Field Service mobile app.	Field Service Mobile
<input type="checkbox"/>	Field Representative/Assistant	Allow access to commerce merchandising features.	Commerce Merchandise User Permission Set One Seat
<input type="checkbox"/>	Marketing	Read Access to all entities installed by Order Management.	Marketing Order Management User
<input type="checkbox"/>	Order Management	Access to all features enabled by Order Management.	Lightning Order Management User
<input type="checkbox"/>	Order Management Operations Manager		

1-20 of 30 | 0 Selected | Page 1 of 2



Permission Sets | Salesforce

https://kiot-5c-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2Fuide%2FPermissionSet%2FnewPermissionSet.apexp

Setup Home Object Manager

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

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

Permission Sets

Create

Enter permission set information

Label: API Name: Description:
Session Activation Required:

Select the type of users who will use this permission set.

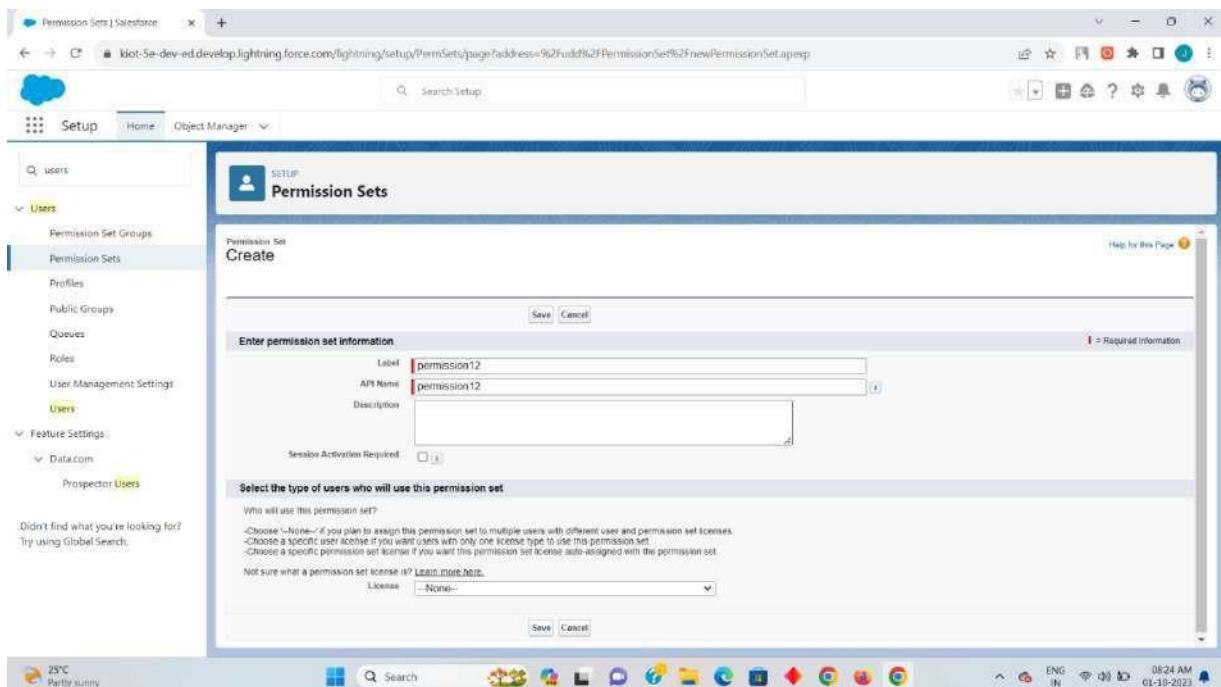
Who will use the permission set?

<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



Permission Sets | Salesforce

Setup Home Object Manager

Users

Permission Set Groups

Permission Sets

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Public Groups

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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

permission12

Find Settings Close Edit Properties Manage Assignments

Permission Set Overview

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

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

Apps

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

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

Object Settings: Permissions to access objects and tabs, 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

25°C Party sunny

Search

ENG IN 08:24 AM 01-10-2023

Permission Sets | Salesforce

Setup Home Object Manager

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector: Users

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

SETUP Permission Sets

permission12

Find Settings Close Edit Properties Manage Assignments

Permission Set Overview Object Settings

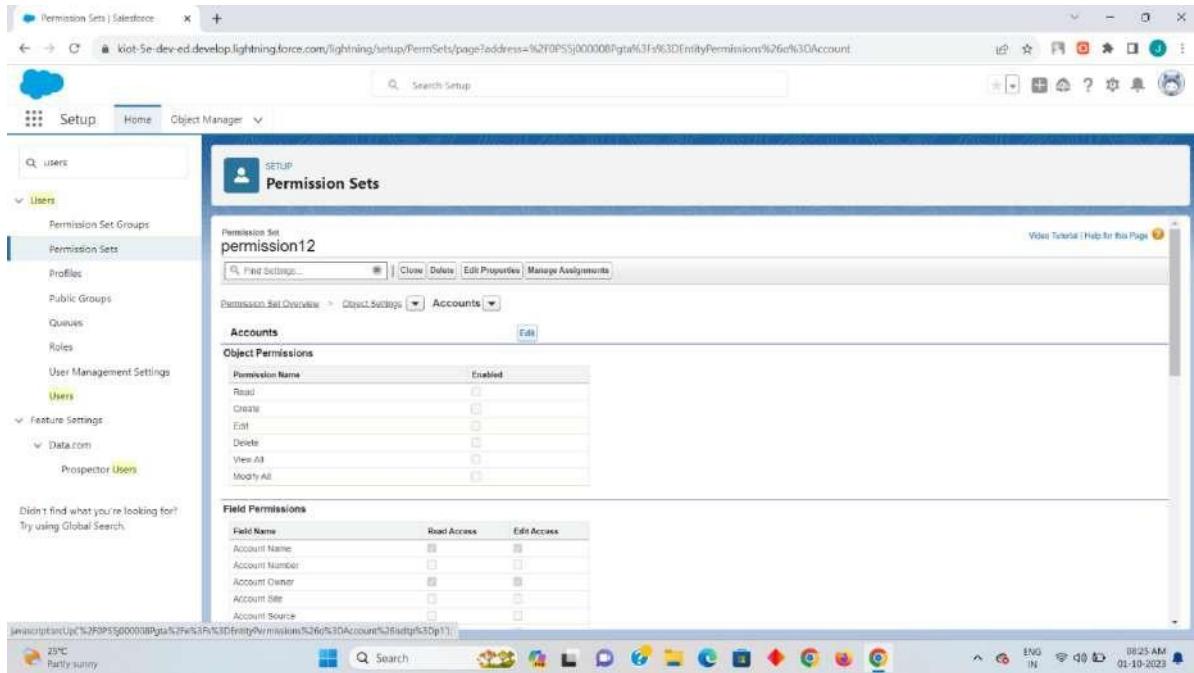
Object Settings

Object Name	Object Permissions	Total Fields	Tab Settings
Account	No Access	9	—
Account	No Access	44	—
Alt Intent Requests	No Access	—	—
Alt Record Involve	No Access	—	—
Alternative Payment Methods	No Access	27	—
API Anomaly Event Status	No Access	14	—
Bop Analytics Query Requests	No Access	—	—
Application Usage Aggregations	No Access	—	—
Appointment Categories	No Access	3	—
Appointment Invitations	No Access	17	—
Appointment Invites	—	4	—
Appointment Schedule Aggregates	No Access	—	—
Appointment Schedules Loss	No Access	—	—
Appointment Task Time Slots	No Access	5	—
Asset Actions	No Access	30	—
Asset Action Sources	No Access	18	—

25°C Party sunny

Search

ENG IN 08:25 AM 01-10-2023



Stcp7:

Nowtogi:ctkc3pcciricdcltcaccc33totkc
"3cícliceo→cdito→tkcAcco"→ta→dtkc→
c→ablctkcícad, cícate, cdita→dtkcdclctco→it
3otkattkpcíÉ i33io→3ctwillka:ca3pcciric
3pccialaccc33o→it.o→ccitka3bcc→do→c
cliffeo→3a:ca→dtkc→cliffeo→É a→agc a33ig→É c→t.

Permission Set | Salesforce

Setup Home Object Manager

Users

Permission Set Groups

Permission Sets

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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

Permission Set Overview > Object Settings Accounts

Object Permissions

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

Field Permissions

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

Permission Set | Salesforce

Setup Home Object Manager

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

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

25°C Partly sunny

Permission Set Overview > Object Settings Accounts

Object Permissions

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

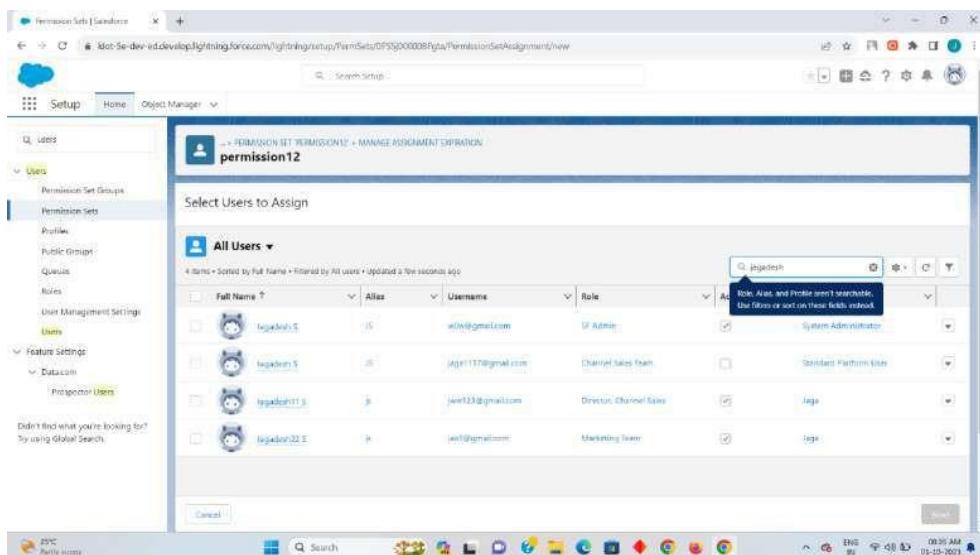
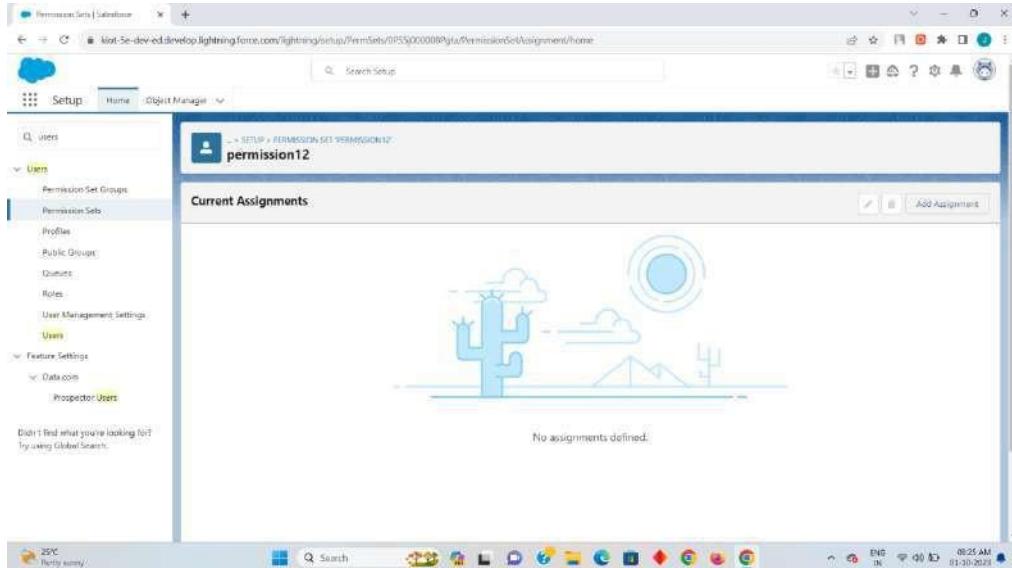
Field Permissions

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

Stcp®

Nowcliceo→adda33ig→É c→ttkcícQo"will
ri→dQo"ítwocícated"3cí3cliceo→a→Qo→ic
"3cítogi:ca3pccialacc33a3dclctco→it
a→dtkc→cliceo→a33ig→3otkattkc3pcciric

selected "selected" as primary access
selected to it.



The screenshot shows the Salesforce Setup interface for managing permission sets. The left sidebar is under the 'Users' section, with 'Permission Sets' selected. The main content area is titled 'PERMISSION SET permission12 > MANAGE ASSIGNMENT EXPIRATION'. It displays a table titled 'Select Users to Assign' with the following data:

Full Name	Role	Profile
legadev5	SF Admin	System Administrator
legadev5	Channel Sales Team	Standard Platform User
legadev115	Director, Channel Sales	Iega
legadev225	Marketing Team	Iega

At the bottom right of the main window are 'Cancel' and 'Next' buttons.

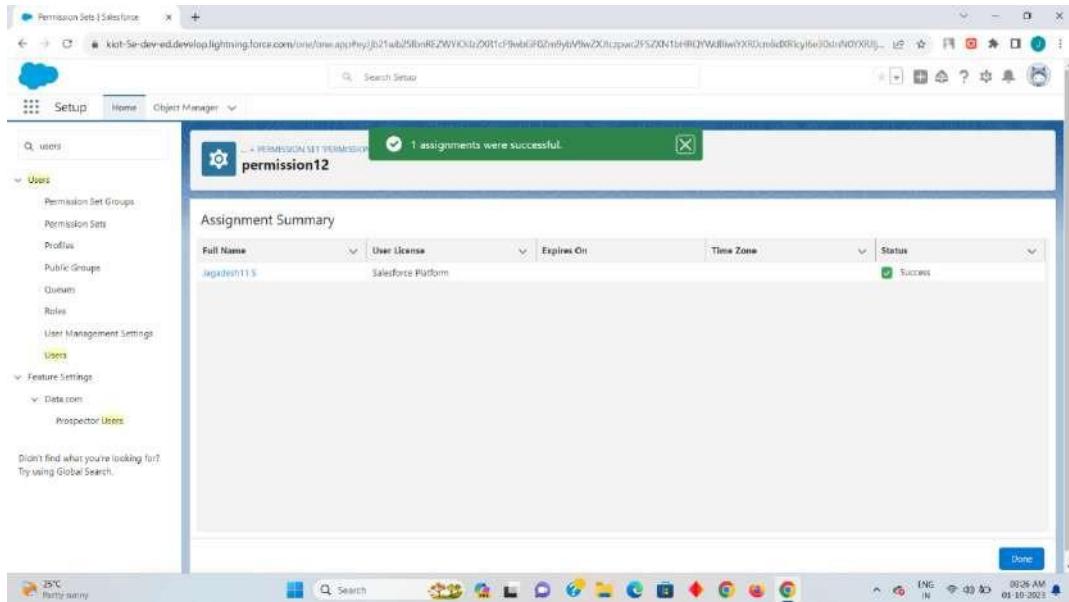
Cliceo→→lctxt.

The screenshot shows the continuation of the Salesforce Setup interface for managing permission sets. The left sidebar remains the same. The main content area is titled 'PERMISSION SET permission12 > MANAGE ASSIGNMENT EXPIRATION'. It displays a table titled 'Selected Users' with the following data:

Full Name	Role	Profile	Active	User License	Expires On
legadev115	Director, Channel Sales	Iega	✓	Salesforce Platform	Never Expires

At the top of this section, there are two radio button options: 'No expiration date' (selected) and 'Specify the expiration date'. Below these are buttons for '1 Day', '1 Week', '30 Days', 'All Days', and 'Custom Date'. To the right is a 'Time Zone' dropdown labeled 'Select a time zone...'. At the bottom right of the main window are 'Cancel', 'Back', and 'Assign' buttons.

Nowcliceo→A33ig→l.



Nowtkc3pcciricaccc33roítkcJagadc3k11
"3cíka3bcc→a33ig→cd3"ccc33r"1lQ.

4. Cícatca \exists cícc \rightarrow r lowroíaba \exists ic \exists "í:cQtorill i \rightarrow tkc dctail \exists roí a \rightarrow Q roíÉ .

Sol"tio \rightarrow :

Stcp1:CícatcaC" \exists toÉ Objcct
lkc \rightarrow cxt \exists tcpi \exists tocícatcac" \exists toÉ
objcct **S"í:cQRc3"Ita \rightarrow darcwc" \exists toÉ ricld \exists**
to \exists toíc \exists "í:cQíc \exists po \rightarrow 3 c \exists .

1. Clíce **Sct"*p*.**
2. I \rightarrow tkcObjcctMa \rightarrow agc|clíce **Cícatc/
C" \exists toÉ Objcct.**
«. Nowcícatcac" \exists toÉ objcct **S"í:cQ
Rc3"Ita \rightarrow dricld \exists a \exists 3 kow \rightarrow i \rightarrow tkc 3 cícc \rightarrow 3 kot
bclow:**
4. Clíce **Sa:c.**

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

Stcp2:CícatcaL' ka→eYo "FoÍS" í:cQ

L'igkt→i→gEÉ aill'L' cÉ platc

1. Clice **AppLa"→ckcí.**
2. I→tkcq "iceFi→dbox, tQpc **EÉail L'cÉplatc3.**
3. Clices o→tkc **Ncw EÉail tcÉplatcb"tto→!**
4. **NaÉc** tkc **Ligkt→i→g EÉailL'cÉplatca→dÉ aec3 "ícto3 toíciti→**
tkc P"blicEÉailL'cÉplatc3roldcí.
5. CícatcatcÉ platcliektkcrollowi→g

3 cícc → 3 kőt.

Email Template: Thank You Email - Survey

Edit in Builder Edit Clone

Details Related

Information

Email Template Name: Thank You Email - Survey
Description:
Made in Email Template Builder

Related Entity Type: Survey Result
Folder: Public Email Templates

Message Content

Subject: Thank You For Completing Our Survey!
Enhanced Letterhead

HTML Value:

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

Additional Information

Created By: Rakesh Gupta, 12/21/2020, 4:23 PM Last Modified By: Rakesh Gupta, 12/21/2020, 4:32 PM

Stop « :Cícatca → E-mail Alcít

1. Clique **Slect "p.**
2. Ir → tkc q "ice Fi → dbo x, tQpc **EAlcít3.**
- « . Select **EEmail Alcít3**, clique o → tkc **N**

EÉailAlcítb"tto→!.

4. **NaÉctkc EÉailAlcítatod click etabb"t to→!. L'kc U→iq"cNaÉc will pop"latc.**
 5. **FoíObjccts collect S"í:cQRc3"It.**
 6. **Foítkc EÉail**
L'cÉplatc cko o 3 c 3 Light→ing
EáL'cÉplatc L'ka→e Yo"EÉail-S"í:cQ.
 7. **FoíRccipic→tL'Qpc3 collect EÉailField: EÉail.**
- ® . Clice **Sa:c.**

Edit Email Alert

Survey - Thank You Email

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

Email Alert Edit

Save Save & New Cancel

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

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

Add Remove

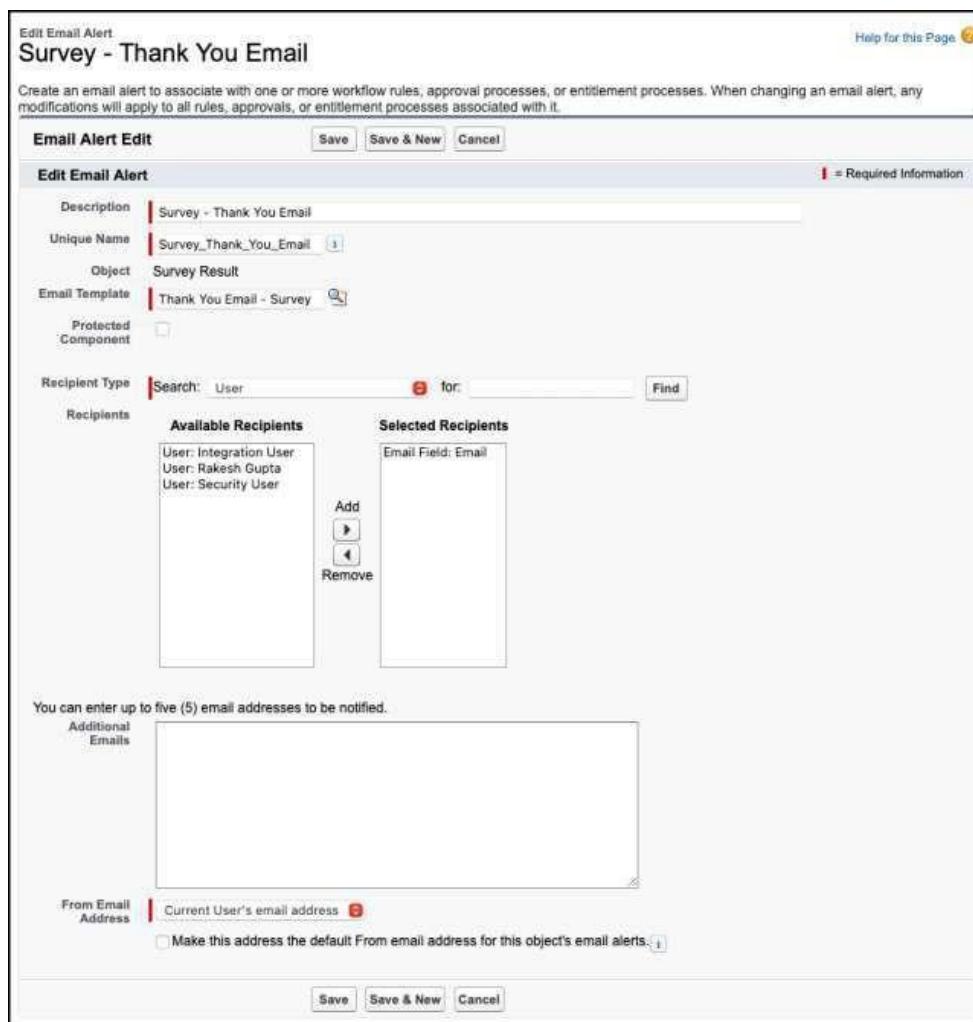
You can enter up to five (5) email addresses to be notified.

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



Stcp4. 1:Salc3 roíccFlow—CícatcaScícc→
tkatAllowU3 cí3 toFillS"í:cQ

1. Clice **Sct"p.**
2. I→tkcø "iceFi→dbox, tQpc **Flow3.**
- «. Sclccct **Flow3** tkc→cliceo→tkc **Ncw Flow.**
4. Sclcccttkc **Scícc→Flow** optio→a→d
cliceo→**Ncxt**a→dco→rig"ítkcrlowa3 rollow3 :
 1. **How do Qo" wa→t to 3taít
b"ildi→g: FíccroiÉ**
5. Wcwill"3 ctkc **Scícc→clcÉ** c→tto
capt"íca **S"í:cQ íc3po→3croíÉ**. Kíag
a→ddíopa **Scícc→clcÉ** c→tto→totkc ca→:a3.

Stcp4. 2:Salc3 roíccFlow—AddaRccoíd
Cícatc3 ElcÉ c→ttoSa:cS"í:cQRc3 po→3 c

1. Kíag-a→d-díop tkc **Cícatc**
Rccoíd3clcÉ c→tto→totkcFlow
dc3 ig→cí.
2. E→tcía→aÉ ci→tkc **Labcl(Sa:c**
Rc3po→3c) ricld;tkc **APINaÉc** willa"to-
pop"latc.
- «. Foí **How Ma→Q Rccoíd3 to Cícatc** - 3 clccct
O→c.

4. Foí **HowtoScttkcRccoidFicld3** – з clcct **Uзс зcpаіatc ícзo"íccз, a ↗d lItcіal :al"с3.**
5. Sclccttkc **S"í:cQ_Rc3"It_c** objcct ríоÉ tkcdopdow·li3 t.
6. **SctFicldVal"с3roítkcS"í:cQRc3"It**
 1. Row1:
 1. **Ficld:CoÉÉc→t__c**
 2. **Val"c:{!CoÉÉc→t}**
 2. Clice **AddRow**
 - « . Row2:
 1. **Ficld:EÉail__c**
 2. **Val"c:{!EÉail.:al"с}**
 4. Clice **AddRow**
 5. Row« :
 1. **Ficld:NaÉc__c**
 2. **Val"c:{!NaÉc.rií3tNaÉc}**
{!NaÉc.la3tNaÉc}
 6. Clice **AddRow**
 7. Row« :
 1. **Ficld:Rati→g__c**
 2. **Val"c:{!Rati→g}**
7. Clice **Ko→c.**

Edit Create Records

Create Salesforce records using values from the flow.

* Label	* API Name																				
Save Response	Save_Response																				
Description																					
<p>How Many Records to Create</p> <input checked="" type="radio"/> One <input type="radio"/> Multiple																					
<p>How to Set the Record Fields</p> <input type="radio"/> Use all values from a record <input checked="" type="radio"/> Use separate resources, and literal values																					
<p>Create a Record of This Object</p> <p>* Object</p> <p>Survey Result</p>																					
<p>Set Field Values for the Survey Result</p> <table border="1"> <tr> <td>Field</td> <td>Value</td> </tr> <tr> <td>Comment__c</td> <td><input type="text" value="A3 Comment X"/></td> </tr> <tr> <td>Field</td> <td>Value</td> </tr> <tr> <td>Email__c</td> <td><input type="text" value="A3 Email > Value X"/></td> </tr> <tr> <td>Field</td> <td>Value</td> </tr> <tr> <td>Name__c</td> <td><input type="text" value="({!Name.firstName} {!Name.lastName})"/></td> </tr> <tr> <td>Field</td> <td>Value</td> </tr> <tr> <td>Rating__c</td> <td><input type="text" value="A3 Rating X"/></td> </tr> <tr> <td colspan="2">+ Add Field</td> </tr> <tr> <td colspan="2"><input type="checkbox"/> Manually assign variables</td> </tr> </table>		Field	Value	Comment__c	<input type="text" value="A3 Comment X"/>	Field	Value	Email__c	<input type="text" value="A3 Email > Value X"/>	Field	Value	Name__c	<input type="text" value="({!Name.firstName} {!Name.lastName})"/>	Field	Value	Rating__c	<input type="text" value="A3 Rating X"/>	+ Add Field		<input type="checkbox"/> Manually assign variables	
Field	Value																				
Comment__c	<input type="text" value="A3 Comment X"/>																				
Field	Value																				
Email__c	<input type="text" value="A3 Email > Value X"/>																				
Field	Value																				
Name__c	<input type="text" value="({!Name.firstName} {!Name.lastName})"/>																				
Field	Value																				
Rating__c	<input type="text" value="A3 Rating X"/>																				
+ Add Field																					
<input type="checkbox"/> Manually assign variables																					
Cancel Done																					

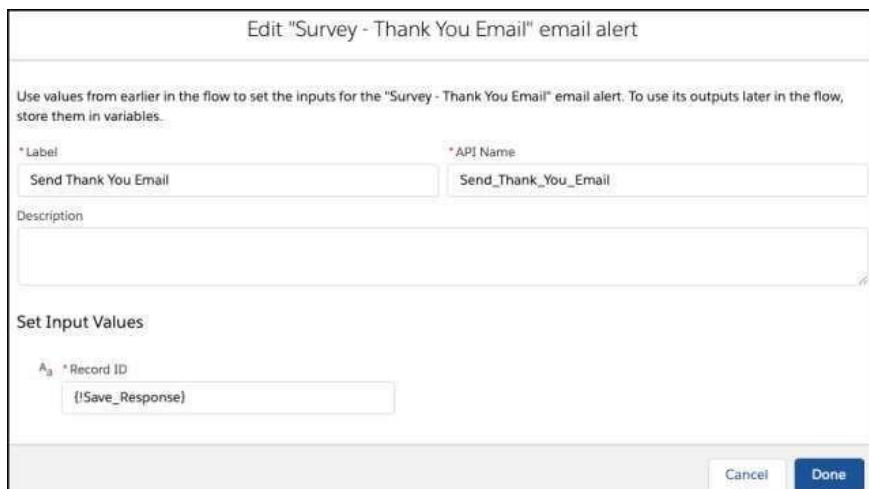
Stcp4. « :Salc3 roíccFlow-Calla→Acto→l-
EÉ ailAlcíttoSc→d0"tL'ka→eYo"EÉ ail

L'kc→lctxt3 tcpi3 tocalltkc **S"í:cQ-L'ka→e**
Yo"EÉailcÉ ailalcítríoÉ rlow3 otkatwkc→
 rlowriúc3 ittíiggcí3 tkctka→eQo"cÉ ailto 3 "í:cQ
 paíticipa→t3.

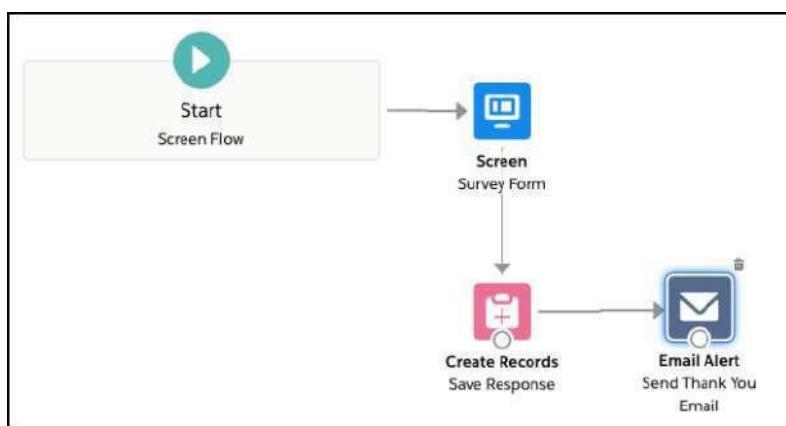
1. U→dcí **Loolbox**, 3 clcct **ElcÉc→t**.
2. Kíag-a→d-díop **Action**→clcÉ c→lto→to
 tkcFlowdc3 ig→cí.
- « . I→tkc **Action**→box, tQpc **S"í:cQ-L'ka→e**

Yo"EEail.

4. Clice 3 o→tkc S"í:cQ – L'ka→e Yo"
EEailcÉ ailalcít.
5. Clice **Ko→c**.



I→tkcc→d, Scígio' **3Flow** will looelieectkc rollowi→g
3 cícc→3 kot:



1. Clice **Sa:c**.
2. E→tcí **Flow Label** tkc **API NaÉc** will a"to-pop"latc.
3. Clice **SkowAd:a→ccd**.
4. **HowtoR"→tkcFlow: U3cíoíSQ3tcÉ**

Context—Keep track of How Flow is Launched

5. **LQPc: Scic Flow**
 6. **APIVc3io→roiR"→j→gtkcFlow: 51**
 7. **I→tcí:icwLabcl: S"í:cQ**
{!\$Flow.C"íc→tKatcL'iÉc}
- ⑧ . Click **Sa:c.**

Save as

A New Version **A New Flow**

* Flow Label: Survey

* Flow API Name: Survey

Description:

Hide Advanced

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

* Type: Screen Flow

* API Version for Running the Flow: 51

Interview Label: Survey {!\$Flow.CurrentDateTime}

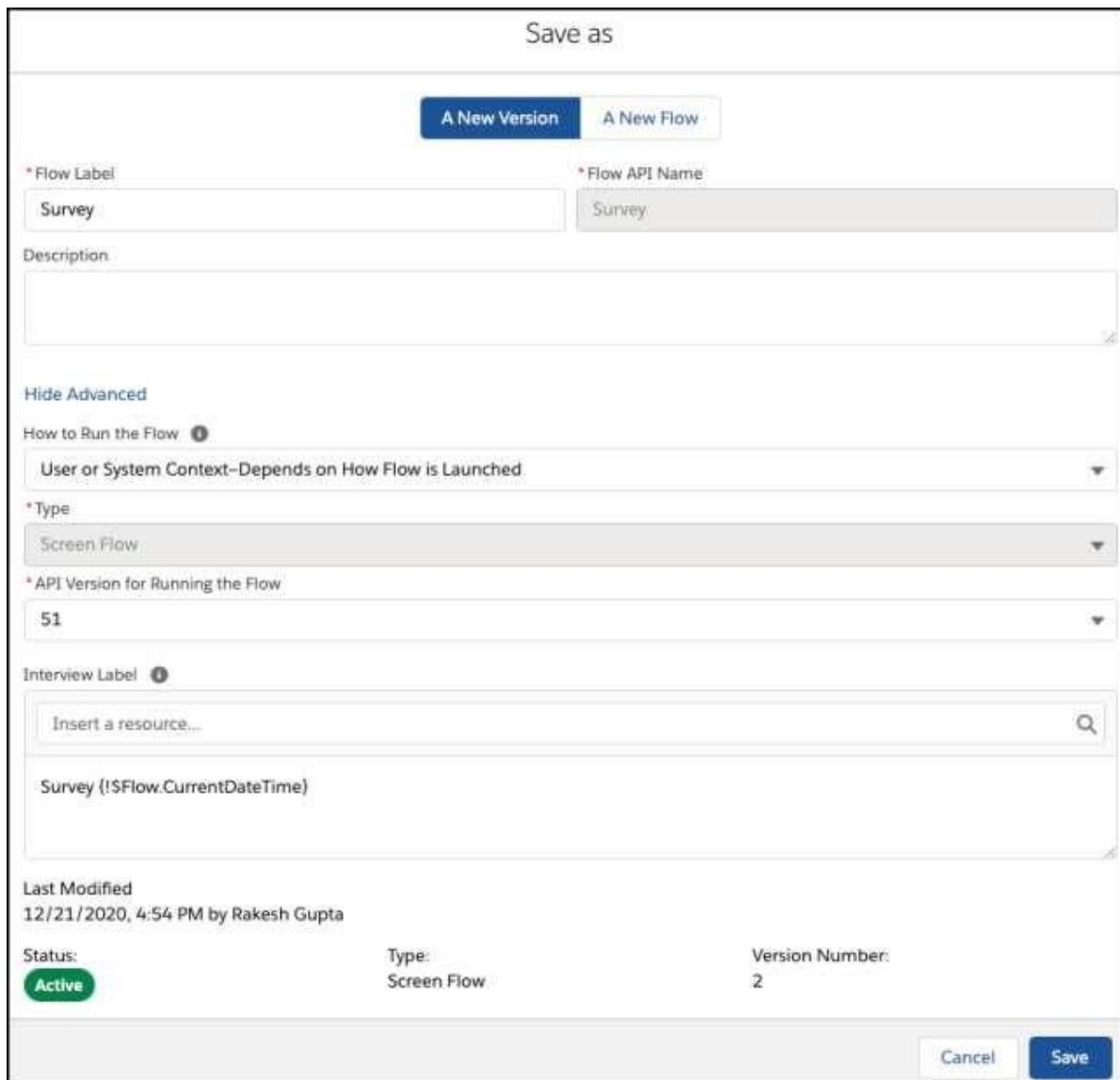
Last Modified: 12/21/2020, 4:54 PM by Rakesh Gupta

Status: **Active**

Type: Screen Flow

Version Number: 2

Cancel **Save**



Stcp5:Cícatcalight→i→gApplicatio→to
Rc→dcíL light→i→gR"→tiÉ croÍFlowi→a
Vi3 "alroíccPage

Nowwcwillcícaticatcalight→i→gApplicatio→
tkatdcclaíc3adcpct→dc→cQo→
tkc **light→i→g:rlow** coÉ po→c→t.

1. Clice **Sct"p/Kc:clopcíCo→3olc**

2. Na:igatcto **Filc/Ncw/Light→i→g**

Applicatio→

«. E→tcía **NaÉc** (**VFPagcLoLC**) ricld, É aec

3 "ic to 3clcct tkc **Light→i→gO"t**

Kcpct→dc→cQ App ckccebox.

4. Clice **S"bÉit.**

5. CopQcodcríoÉ **GitH"ba→dpa3** tcit

i→toQo"íL light→i→gApplicatio→.

6. **Sa:cQo"icodc.**

```
File ▾ Edit ▾ Debug ▾ Test ▾ Workspace ▾ Help ▾ < >
VFPageToLC.app *
1 <aura:application access="global"
2     extends="ltng:outApp"
3     implements="ltng:allowGuestAccess">
4     <aura:dependency resource="lightning:flow"/>
5 </aura:application>
```

Logs, Tests, and Problems

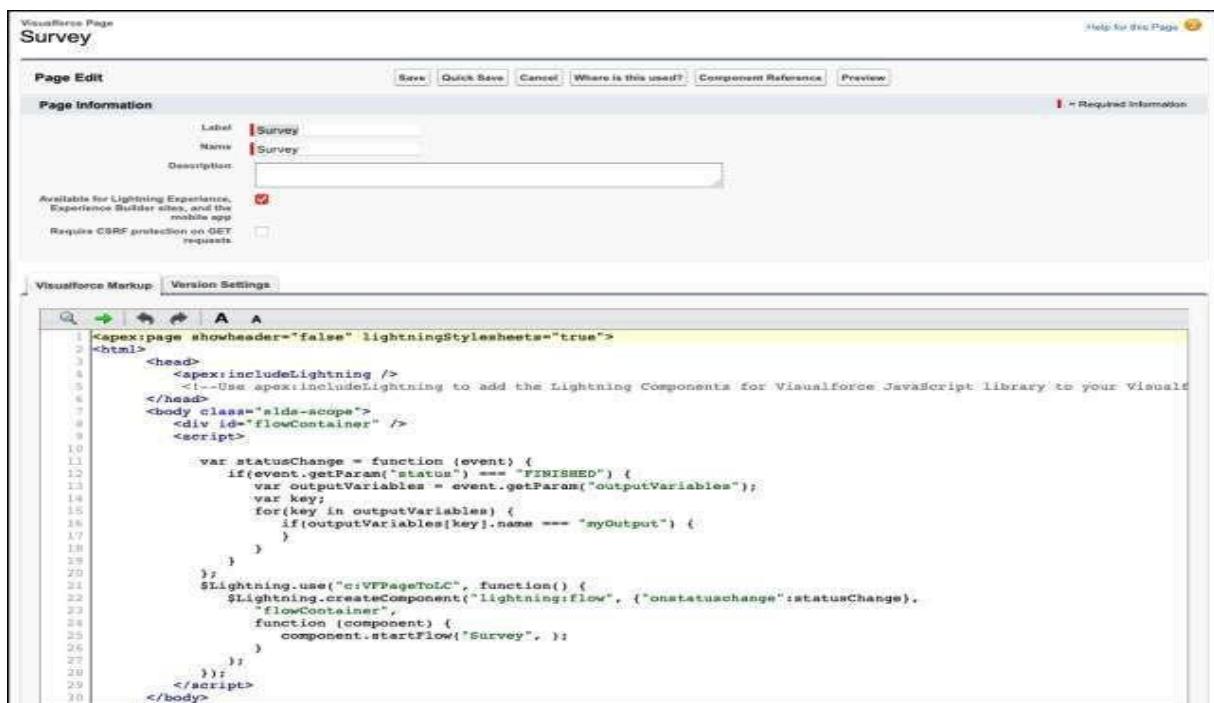
Stcp6:CícatcaVi3 "alroíccPagca→dEÉ bcd Yo"íFlowI→toIt

Nowwcwillcícatcal_ igkt→i→gApplicatio→
tkatdcclaíc3 adcpc→dc→cQo→
tkc **ligkt→i→g:rlow**coÉ po→c→t.

Addtkcl_ igkt→i→gCoÉ po→c→t3 roí
Vi3 "alroíccJa:aScíiptlibíaíQtQo"í Vi3 "alroícc pagc
"3 i→g
tkc »**apcx:i→cl"dcLigkt→i→g/»**coÉ po→c→t. I→
tkcVi3 "alroíccpagc, ícrcíc→cctkc
dcpc→dc→cQapp. L' kc→wíitcaJa:aScíipt

r"→ctio→tkatcícatic3 tkccóÉ po→c→to→tkc pagc "3 i→g
\$Light→i→g.cícatcCoÉpo→c→t()

1. Clice **Sct"p.**
2. I→tkcq "iceFi→dbox, tQpc **Vi3"alroícc**
3. «. Clice3 o→tkc **Ncw**"tto→l.
4. CopQcodcríoÉ **GitH"b**a→dpa3 tcit
i→toQo"í:i3 "alroíccpagc
5. Clice **Sa:c.**



The screenshot shows the Visualforce Page Editor interface. At the top, it says 'Visualforce Page Survey'. Below that is a 'Page Edit' toolbar with buttons for Save, Quick Save, Cancel, Where is this used?, Component Reference, and Preview. A note 'Help for this Page' is visible in the top right. The main area is divided into 'Page Information' and 'Visualforce Markup' tabs. Under 'Page Information', the 'Label' is set to 'Survey', 'Name' is 'Survey', and 'Description' is empty. There are checkboxes for 'Available for Lightning Experience, Experience Builder sites, and the mobile app' (unchecked) and 'Requires CSRF protection on GET requests' (unchecked). Under 'Visualforce Markup', the code is as follows:

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

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Site Edit

Save **Cancel**

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

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Survey

Name

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* Email
[redacted]

* Rating
5

* Comment
Awesome Blog 

Next

Artefíz "ccc33r" l3 "bE i33 io-!, kc/3kewillíccci:ca-icE ail.

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

 Survey Site Guest User via [redacted] bcdzwmaa.gsl.bnc.salesforce.com
to me 

8:09 PM (1 minute ago)   

Hi Alok Sinfal,

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

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

Thanks,
Automation Champion