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Assignment no 1

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Year & Dep : 4th year &B.TECH-IT

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Zone no : Zone 8

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

Solution:

Step 1: Create Custom Objects

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

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

- Page Header:** Includes a cloud icon, navigation tabs (Setup, Home, Object Manager), a search bar (Search Setup), and various system icons.
- Section:** SETUP / New Custom Object
- Section Title:** New Custom Object
- Message Bar:** A yellow bar at the top indicates that permissions for this object are disabled by default and provides links to "Tell me more!" and "Don't show this message again".
- Custom Object Definition Edit:** Contains tabs for Save, Save & New, and Cancel.
- Custom Object Information:**
 - The singular and plural labels are used in tabs, page layouts, and reports.
 - Label:** College (Example: Account)
 - Plural Label:** colleges (Example: Accounts)
 - Starts with vowel sound:**
- Object Name:** college (Example: Account)
- Description:** (Empty text area)
- Context-Sensitive Help Setting:**
 - Open the standard Salesforce.com Help & Training window
 - Open a window using a Visualforce page
- Content Name:** None
- Enter Record Name Label and Format:**
 - The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.
 - Record Name:** college Name (Example: Account Name)
 - Data Type:** Text
- Optional Features:**
 - Allow Reports
 - Allow Activities
 - Track Field History
 - Allow in Chatter Groups
 - Enable Licensing
- Object Classification:**
 - When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more](#).
 - Allow Sharing
 - Allow Bulk API Access
 - Allow Streaming API Access
- Deployment Status:**
 - In Development
 - Deployed
- Search Status:**
 - When this setting is enabled, your users can find records of this object type when they search. [Learn more](#).
 - Allow Search
- Object Creation Options (Available only when custom object is first created):**
 - Add Notes and Attachments related list to default page layout
 - Launch New Custom Tab Wizard after saving this custom object

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

The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. A message at the top indicates that permissions for the new object are disabled by default. The 'Custom Object Definition Edit' screen is displayed, with the 'Label' field set to 'department' and the 'Plural Label' field set to 'departments'. The 'Content Name' dropdown is set to 'None'. Under 'Optional Features', 'Allow Sharing' is checked. In the 'Deployment Status' section, 'Deployed' is selected. At the bottom, there are 'Save', 'Save & New', and 'Cancel' buttons.

Step 2: Create a Master-Detail Relationship

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

1. Go to Setup > Object Manager.
2. Click on "College__c" to open its settings.

In the left sidebar, click on "Fields & Relationships."

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

Cloud icon

Setup Home Object Manager

SETUP > OBJECT MANAGER CDepartment

Details

Fields & Relationships	Description
Page Layouts	API Name
Lightning Record Pages	CDepartment__c
Buttons, Links, and Actions	Custom
Compact Layouts	✓
Field Sets	Singular Label
Object Limits	CDepartment
Record Types	Plural Label
Related Lookup Filters	CDepartments
Restriction Rules	
Scoping Rules	
Triggers	
Flow Triggers	
Validation Rules	

Edit Delete

Cloud icon

Setup Home Object Manager

SETUP > OBJECT MANAGER CDepartment

Details

Fields & Relationships

New Relationship

Step 3. Enter the label and name for the lookup field Step 3 of 6

Help for this Page Previous Next Cancel

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

Lookup Filter

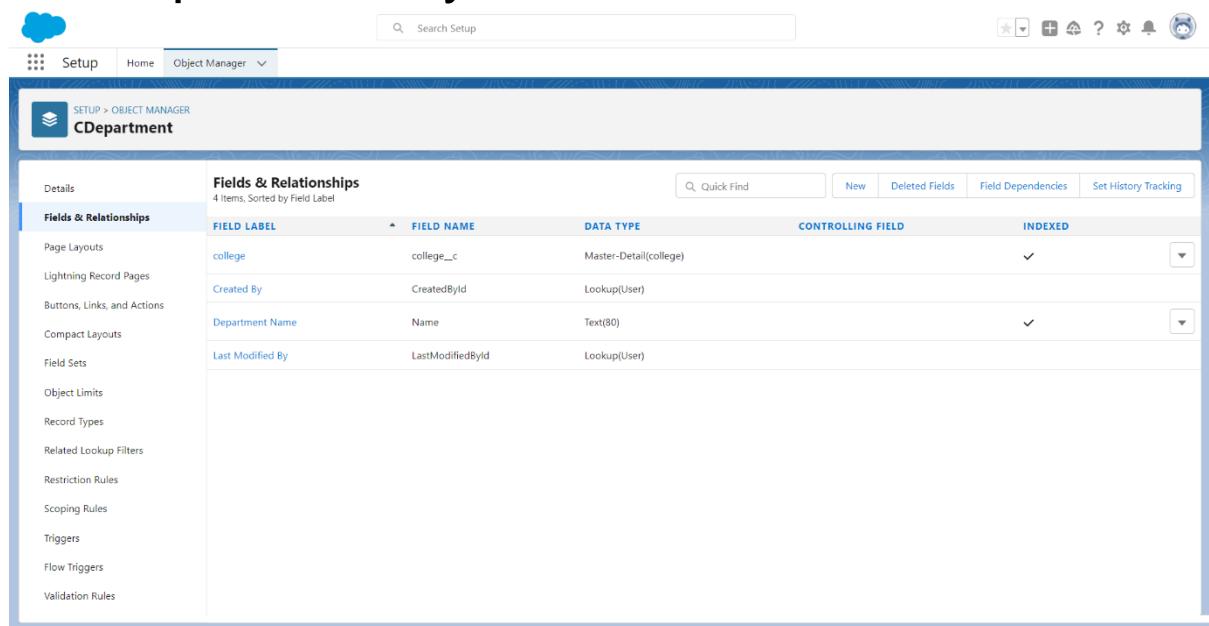
The top screenshot shows the 'New Relationship' wizard, Step 2 of 6. It asks to choose a related object, with 'college' selected in the dropdown. The bottom screenshot shows the 'New Custom Field' wizard, Step 1 of 6. It asks to choose the field type, with 'Roll-Up Summary' selected.

Step 3: Create the Roll-Up Summary Field

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

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

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



The screenshot shows the Salesforce Object Manager interface for the 'CDepartment' object. The left sidebar lists various setup options like Page Layouts, Lightning Record Pages, Buttons, etc. The main content area displays the 'Fields & Relationships' section. It shows four items sorted by Field Label. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The data is as follows:

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

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.

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

Web Tabs

No Web Tabs have been defined.

Visualforce Tabs

No Visualforce Tabs have been defined.

Lightning Component Tabs

No Lightning component tabs have been defined.

Lightning Page Tabs

No Lightning Page Tabs have been defined.

Details

Fields & Relationships

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

New Custom Field

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.

Add Field Page Layout Name
 college Layout

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

The screenshot shows the 'New Custom Field' setup page in Salesforce. The left sidebar lists various configuration options under 'Fields & Relationships'. The main area is titled 'Step 4. Establish field-level security' with a sub-header 'Field Label: Total count, Data Type: Roll-Up Summary, Field Name: Total_count, Description:'. It displays a table of profiles and their access levels:

Field Level Security for Profile	Visible	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"/>
Force.com - App Subscription User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

The screenshot shows the 'New Custom Field' setup page in Salesforce. The left sidebar lists various configuration options under 'Fields & Relationships'. The main area is titled 'Step 3. Define the summary calculation' with a sub-header 'Master Object: college, Summarized Object: CDDepartments'. It includes sections for 'Select Object to Summarize' (Master Object: college, Summarized Object: CDDepartments), 'Select Roll-Up Type' (COUNT selected, SUM, MIN, MAX options available), and 'Filter Criteria' (All records should be included in the calculation selected). Navigation buttons at the bottom right include 'Previous', 'Next', and 'Cancel'.

The screenshot shows the Salesforce Setup interface for creating a new custom field. The object being created is 'college'. The field name is 'Total count' and the field label is also 'Total count'. The field type is set to 'Roll Up Summary'. The 'Add this field to existing custom report types' checkbox is checked. The page is labeled 'Step 2 of 5'.

The screenshot shows the Salesforce Setup interface for creating a new custom field. The object being created is 'college'. The field type is selected as 'Roll Up Summary'. The page is labeled 'Step 1'.

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar at the top right contains the text 'college'. Below the navigation is a breadcrumb trail: 'SETUP > OBJECT MANAGER college'. On the left, a sidebar lists various setup categories like 'Page Layouts', 'Lightning Record Pages', and 'Validation Rules'. The main content area is titled 'Fields & Relationships' and displays a table of four items. The table columns are 'FIELD LABEL', 'FIELD NAME', 'DATA TYPE', 'CONTROLLING FIELD', and 'INDEXED'. The data is as follows:

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

Step 4: Create a Lightning App

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

9. Review and Save the app.

10. Assign the app to users or profiles.

11. Test the app with the assigned users.

The screenshot shows the Salesforce Setup interface with the 'Tabs' page open. The left sidebar includes 'Setup', 'Home', 'Object Manager', and sections for 'User Interface' like 'Rename Tabs and Labels' and 'Tabs'. A search bar at the top right has 'Search Setup' and a magnifying glass icon. The main content area has a header 'New Custom Object Tab' and 'Step 2. Add to Profiles' (Step 2 of 3). It asks to choose user profiles for the new tab. Two radio buttons are shown: 'Apply one tab visibility to all profiles [Default On]' (selected) and 'Apply a different tab visibility for each profile'. A large table lists various user profiles on the left and their corresponding 'Tab Visibility' dropdown menus on the right. Most dropdowns show 'Default On'. At the bottom are 'Previous', 'Next', and 'Cancel' buttons.

The screenshot shows the Salesforce Setup interface with the 'Tabs' tab selected. The main content area is titled 'New Custom Object Tab' and is divided into three steps. Step 1, 'Enter the Details', is currently active. It allows users to choose a custom object ('Object' dropdown set to 'college') and a tab style ('Tab Style' dropdown set to 'Jewel'). A note indicates that users can choose a 'Splash Page Custom Link' to show as a splash page when users click on the tab. Step 2, 'Customize the Tab', is visible below. Step 3, 'Add to Custom Apps', is also visible. The top navigation bar includes links for Home, Object Manager, and various system icons.

The screenshot shows the 'Step 3: Add to Custom Apps' page. It lists various standard and custom apps available for adding to the new custom tab. Each app has a checkbox labeled 'Include Tab'. Most checkboxes are checked. A note at the bottom states: 'Append tab to users' existing personal customizations'. The top navigation bar includes links for Home, Object Manager, and various system icons.

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

New Custom Object Tab

Step 1. Enter the Details

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

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

Object	CDDepartment
Tab Style	Lightning

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

Splash Page Custom Link: [-None--](#)

Description:

Next Cancel

Lightning Experience App Manager

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

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

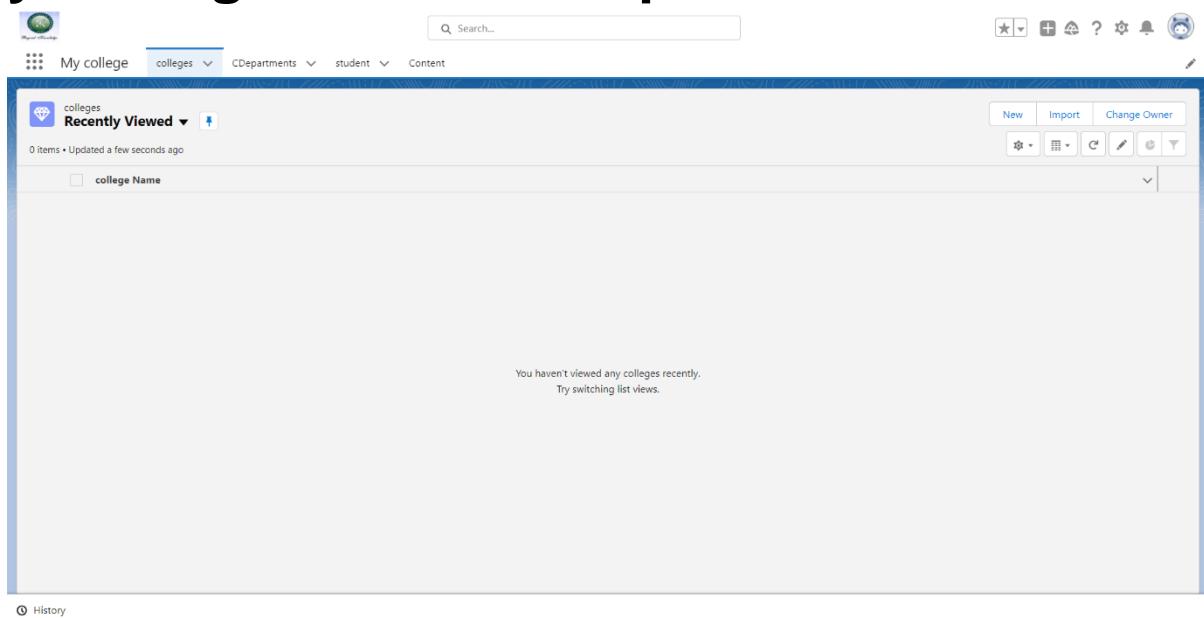
The screenshot shows the Salesforce Setup interface with the 'Tabs' page selected. The left sidebar has a search bar and navigation links for 'User Interface' and 'Rename Tabs and Labels'. The main content area is titled 'Custom Tabs' and contains sections for 'Custom Object Tabs', 'Web Tabs', 'Visualforce Tabs', 'Lightning Component Tabs', and 'Lightning Page Tabs'. Each section includes a 'New' button and a 'What Is This?' link. Under 'Custom Object Tabs', there is a table with columns 'Action', 'Label', 'Tab Style', and 'Description'. The table lists five tabs: 'Book1' (Box), 'Departments' (Lightning), 'colleges' (Jewel), 'Research_Proposal' (Square), and 'student' (Box). The 'Web Tabs' section indicates 'No Web Tabs have been defined'. The 'Visualforce Tabs' section indicates 'No Visualforce Tabs have been defined'. The 'Lightning Component Tabs' section indicates 'No Lightning component tabs have been defined'. The 'Lightning Page Tabs' section indicates 'No Lightning Page Tabs have been defined'.

The screenshot shows the Salesforce Setup interface with the 'New Lightning App' page selected. The left sidebar has a search bar and navigation links for 'Salesforce', 'Data', 'Apps', 'Components', 'Lightning', 'Mobile', and 'Setup'. The main content area is titled 'App Details & Branding' and contains fields for 'App Name' (My college), 'Developer Name' (My_college), and 'Description' (Enter a description...). It also includes sections for 'App Branding' (Image, Primary Color Hex Value #217AC7, Org Theme Options checked), and a progress bar with several steps. At the bottom, there are buttons for 'Next' and 'Cancel'.

Conclusion:

Now, whenever you create or update a record in the "Department__c" related to a "College__c," the "TotalCount__c" field on the "College__c" will automatically update to show the total number of related records.

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



app-d-dev-ed.develop.lightning.force.com/lightning/o/college_c/new?count=1&nooverride=1&useRecordTypeCheck=1&navigationLocation=LIST_VIEW&uid=16961390...

My college colleges CDdepartments student Content

New college

* = Required Information

Information

Owner krishna s

college Name kiot

phone 9087116402

Email kiot@ac.in

Location

Latitude 90

Longitude 80

Cancel Save & New Save

History

This screenshot shows the 'New college' form in the Salesforce Lightning interface. The form is titled 'New college' and includes fields for 'college Name' (set to 'kiot'), 'phone' (set to '9087116402'), 'Email' (set to 'kiot@ac.in'), 'Location' (with 'Latitude' set to '90' and 'Longitude' set to '80'), and an 'Owner' field (set to 'krishna s'). The 'Save' button at the bottom right is highlighted in blue.

My college colleges CDdepartments student Content

CDdepartments Recently Viewed

1 item • Updated a few seconds ago

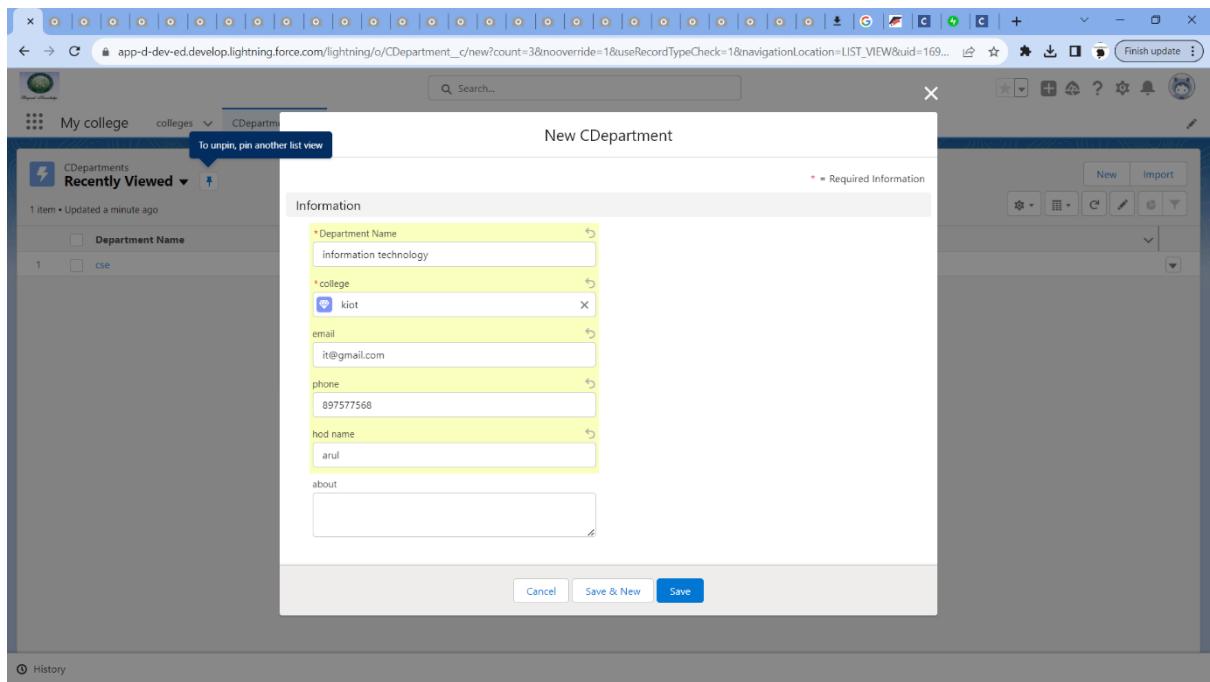
Department Name

cse

New Import

History

This screenshot shows the 'CDdepartments' list view in the Salesforce Lightning interface. It displays a single item named 'cse'. The 'New' and 'Import' buttons are located at the top right of the list view.



My college colleges CDDepts student Content

CDDepartment information technology

New Contact Edit New Opportunity

Related Details

Department Name
information technology

college
kiot

email
it@gmail.com

phone
897577568

hod name
arul

about

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

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

History

My college colleges CDDepts student Content

college kiot

New Contact Edit New Opportunity

Related Details

college Name
kiot

Total count
1

phone
9087116402

Email
kiot@gmail.com

Location
90, 80

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

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

History

My college colleges CDDepts student Content

CDDepts Recently Viewed

New Import

1 item • Updated a few seconds ago

Department Name

cse

My college colleges Recently Viewed

1 item • Updated a few seconds ago

college Name

1 kiot

New Import Change Owner

Search...

History

My college colleges CDdepartments student Content

college kiot

New Contact Edit New Opportunity

Related Details

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

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

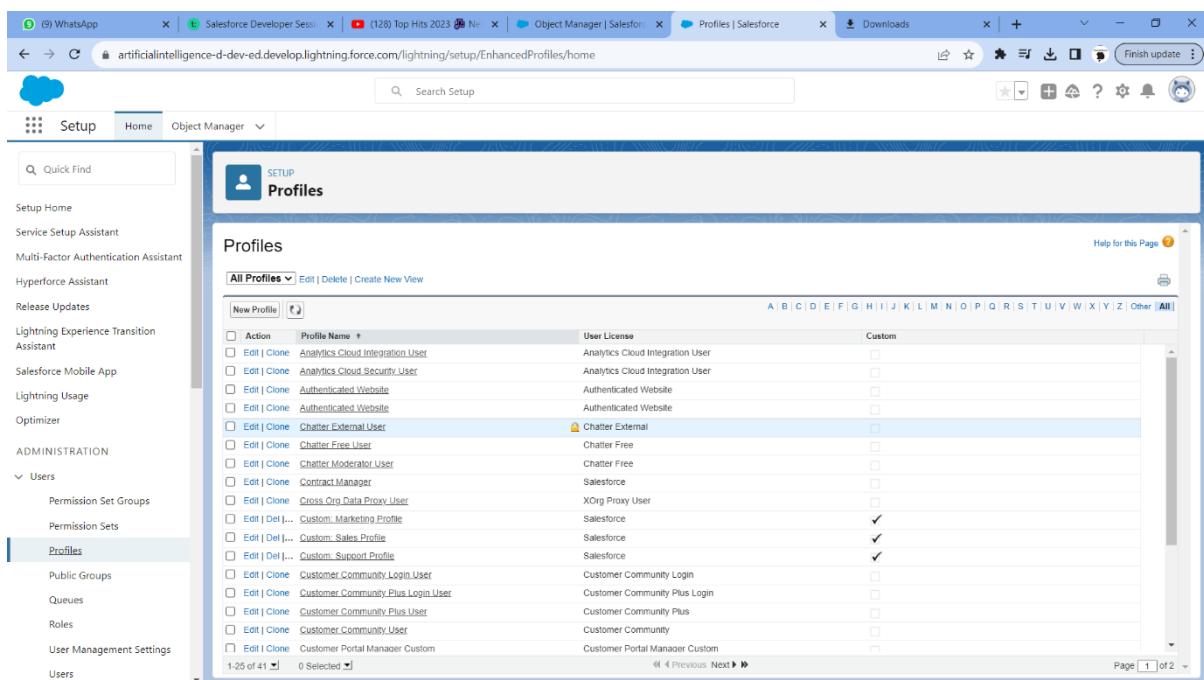
Last Modified By krishna s. 01/10/2023, 11:19 am

History

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

Solution:

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



The screenshot shows the Salesforce Setup interface with the 'Profiles' page 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, Lighting Usage, Optimizer, Administration, Users, and various Profile-related sections like Permission Set Groups, Permission Sets, and Profiles. The main content area displays a table of profiles. One profile, 'Chatter External', is highlighted with a blue selection bar. The table columns include Action, Profile Name, User License, and Custom. The 'User License' column lists various license types such as Analytics Cloud Integration User, Authenticated Website, Chatter External, Chatter Free, Chatter Moderator User, Contract Manager, Cross Org Data Proxy User, Custom Marketing Profile, Custom Sales Profile, Custom Support Profile, Customer Community Login User, Customer Community Plus Login User, Customer Community Plus User, Customer Community User, and Customer Portal Manager Custom. The 'Custom' column contains checkmarks for several profiles, indicating they are custom profiles.

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

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 (with sub-options: Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and Users). The main content area displays a table titled "Profiles" with columns: Action, Profile Name, User License, and Custom. The table lists various profiles such as "Salesforce API Only System Integrations", "salesmanager", "Silver Partner User", "Solution Manager", "Standard Platform User", "Standard User", and "System Administrator". A navigation bar at the bottom indicates "1 of 7" and "0 Selected".

The screenshot shows the "Clone Profile" dialog box. 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." It shows a table with columns: Existing Profile, User License, and Profile Name. Under "Existing Profile", it lists "Standard Platform User". Under "User License", it lists "Salesforce Platform". Under "Profile Name", there is a text input field containing a redacted value. At the bottom of the dialog are "Save" and "Cancel" buttons.

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

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

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

Save Cancel

Help for this Page

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

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

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.

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

Profile Detail

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

Custom Profile ✓

Page Layouts

Standard Object Layouts	Global	Operating Hours
Email Application	Global Layout [View Assignment]	Operating Hours Layout [View Assignment]
Home Page Layout	No Assigned [View Assignment]	Order [View Assignment]
Account	Home Page Default [View Assignment]	Order Product [View Assignment]
Alternative Payment Method	Account Layout [View Assignment]	Payment [View Assignment]
Appointment Invitation	Alternative Payment Method Layout [View Assignment]	Payment Authorization [View Assignment]
Asset	Appointment Invitation Layout [View Assignment]	Payment Authorization Adjustment [View Assignment]
	Asset Layout [View Assignment]	Payment Gateway [View Assignment]

Help for this Page

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

Salesforce Developer Session | artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j00000WQBz%2Fe%3FretURL%3D%252F00e5j0... | Profiles | Salesforce | Downloads | + | - | X | Finish update

Manager

Set the permissions and page layouts for this profile.

Profile Edit

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

Custom App Settings

Visible	Default	Platform (standard_Platform)	Visible	Default
<input type="checkbox"/>	<input type="radio"/>	Analytics Studio (standard_Insights)	<input type="checkbox"/>	<input checked="" type="radio"/>
<input type="checkbox"/>	<input type="radio"/>	App Launcher (standard_AppLauncher)	<input type="checkbox"/>	<input type="radio"/>
<input checked="" type="checkbox"/>	<input type="radio"/>	slot (slot)	<input type="checkbox"/>	<input type="radio"/>
WDC (standard_Work)				

Service Provider Access

Tab Settings

Overwrite users' personal tab customizations

Standard Tab Settings	Home	Default On	Learning	Default On
Accounts	<input checked="" type="checkbox"/>	<input type="radio"/>	Libraries	<input type="checkbox"/>
Alert Settings	<input type="checkbox"/>	<input checked="" type="radio"/>	Lightning Bolt Solutions	<input type="checkbox"/>

Salesforce Developer Session | artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j00000WQBz%2Fe%3FretURL%3D%252F00e5j0... | Profiles | Salesforce | Downloads | + | - | X | Finish update

Communication Subscription Channel Types

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

Custom Object Permissions

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

Salesforce Developer Session | artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e500000WQBz%2Fe%3FretURL%3D%252F00e5j0... | Object Manager | Salesforce | Profiles | Salesforce | Downloads | + | - | Search Setup | Finish update

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

Profiles

Custom Object Permissions

	Bank	customers	Sellers	Streaming Channels	User External Credentials
Contact Point Addresses	Read	Read	Read	Read	Read
Contact Point Consents	Read	Read	Read	Read	Read
Contact Point Emails	Read	Read	Read	Read	Read
Basic Access	Read	Create	Edit	Delete	Data Administration
Bank	✓	✓	✓	✓	✓
customers	✓	✓	✓	✓	✓
Enhancement Requests	Read	Read	Read	Read	Read

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

Changelog: Last updated 1 hour ago by anonymous

Salesforce Developer Session | artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e500000WQBz%2Fe%3FretURL%3D%252F00e5j0... | Object Manager | Salesforce | Profiles | Salesforce | Downloads | + | - | Search Setup | Finish update

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

Profiles

Custom Object Permissions

	Bank	customers	Enhancement Requests		
Contact Point Addresses	Read	Read	Read		
Contact Point Consents	Read	Read	Read		
Contact Point Emails	Read	Read	Read		
Basic Access	Read	Create	Edit	Delete	Data Administration
Bank	✓	✓	✓	✓	✓
customers	✓	✓	✓	✓	✓
Enhancement Requests	Read	Read	Read	Read	Read

Session Settings

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

Password Policies

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

Obscure secret answer for password resets: Require a minimum 1 day password lifetime: Don't immediately expire links in forgot password emails:

Salesforce Developer Session | artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j00000WQbz%2Fe%3FretURL%3D%252F00e5j0... | Object Manager | Salesforce | Profiles | Salesforce | Downloads | + | - | Search Setup | Finish update

Custom Object Permissions

	Bank	customers	Enhancement Requests									
	Read	Create	Edit	Delete	View All	Modify All	Read	Create	Edit	Delete	View All	Modify All
Basic Access	<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
- Obfuscate secret answer for password resets
- Require a minimum 1 day password lifetime
- Don't immediately expire links in forgot password emails

Salesforce Developer Session | artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/ManageUsers/home | Object Manager | Salesforce | Users | Salesforce | Downloads | + | - | Search Setup | Finish update

All Users

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

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

View: All Users | Edit | Create New | View

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit Login	Adriana_Diva	dadan	test_diva_pas_4w@bytb9wtk.tszgrgshkpx3nj8efoyzwns.h43hkzw6mea@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	JMS User
<input type="checkbox"/> Edit	Chatter_Expert	Chatter	chatty.00d500000bcsskeab.lo0hfwmqote@chatter.salesforce.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit Login	Ellington_Amelia	aell	amelia.ellington.146kxc95000jh.d6cwyodcu04wh.hnbdwmyvhho.wguctor1dalv@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/> Edit	S_GCPA	GS	kot520@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	User_Integration	integ	integration@00d500000bcsskeab.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightssecurity@00d500000bcsskeab.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Security User

Salesforce Developer Session | Top Hits 2023 | Object Manager | Salesforce | Users | Salesforce | Downloads

Finish update

Setup Home Object Manager

Users

New User

User Edit Save Save & New Cancel

General Information

First Name: [] Role: <None Specified>

Last Name: [] User License: Salesforce Integration

Alias: [] Profile: Salesforce API Only System Integrations

Email: [] Active:

Username: [] Marketing User:

Nickname: [] Offline User:

Title: [] Knowledge User:

Company: [] Flow User:

Department: [] Service Cloud User:

Division: [] Site.com Contributor User:

Data.com User Type: [] Site.com Publisher User:

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

Accessibility Mode (Classic Only):

High-Contrast Palette on Charts:

Load Lightning Pages While Scrolling:

Debug Mode:

Help for this Page

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

Salesforce Developer Session | Top Hits 2023 | Object Manager | Salesforce | Users | Salesforce | Downloads

Finish update

Setup Home Object Manager

Users

New User

User Edit Save Save & New Cancel

General Information

First Name: sowmiya Role: <None Specified>

Last Name: balaji User License: Salesforce Platform

Alias: sbala Profile: Manager

Email: 2k20ose179@kiot.ac.in Active:

Username: 2k21it@kiot.ac.in Marketing User:

Nickname: User169616771282564526 Offline User:

Title: worker Knowledge User:

Company: kiot bank Flow User:

Department:

Division:

Data.com User Type: [] Service Cloud User:

Data.com Monthly Addition Limit: Default Limit (300) Site.com Contributor User:

Accessibility Mode (Classic Only): Site.com Publisher User:

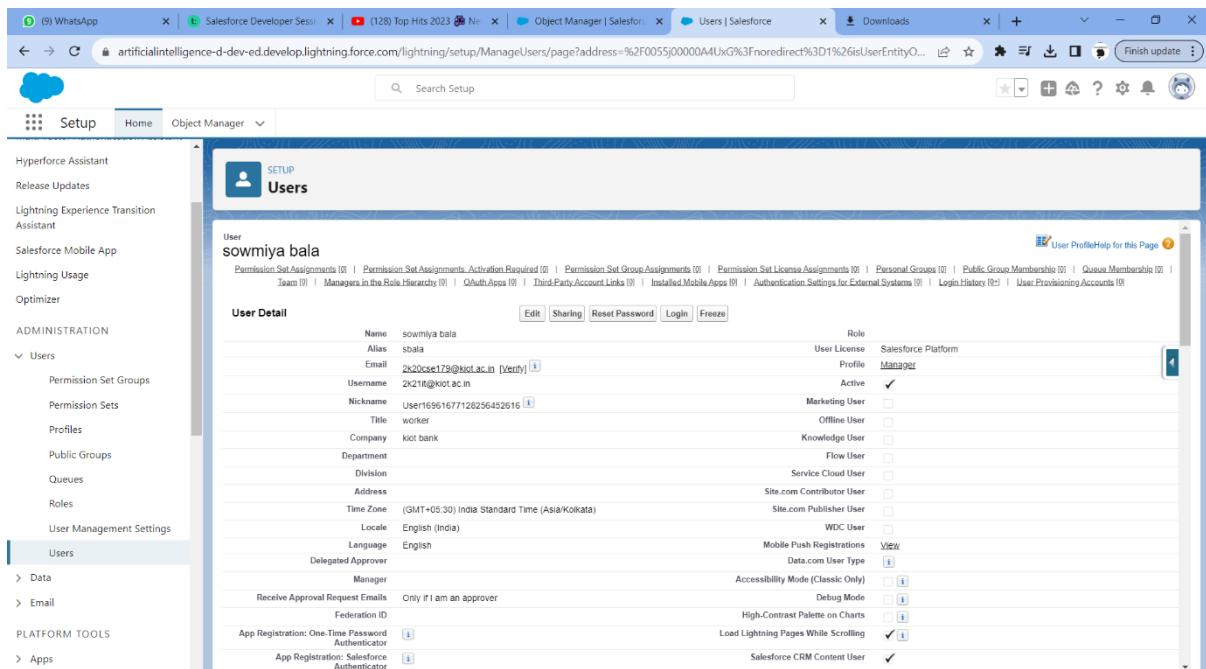
High-Contrast Palette on Charts: WDC User:

Load Lightning Pages While Scrolling:

Debug Mode:

Help for this Page

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



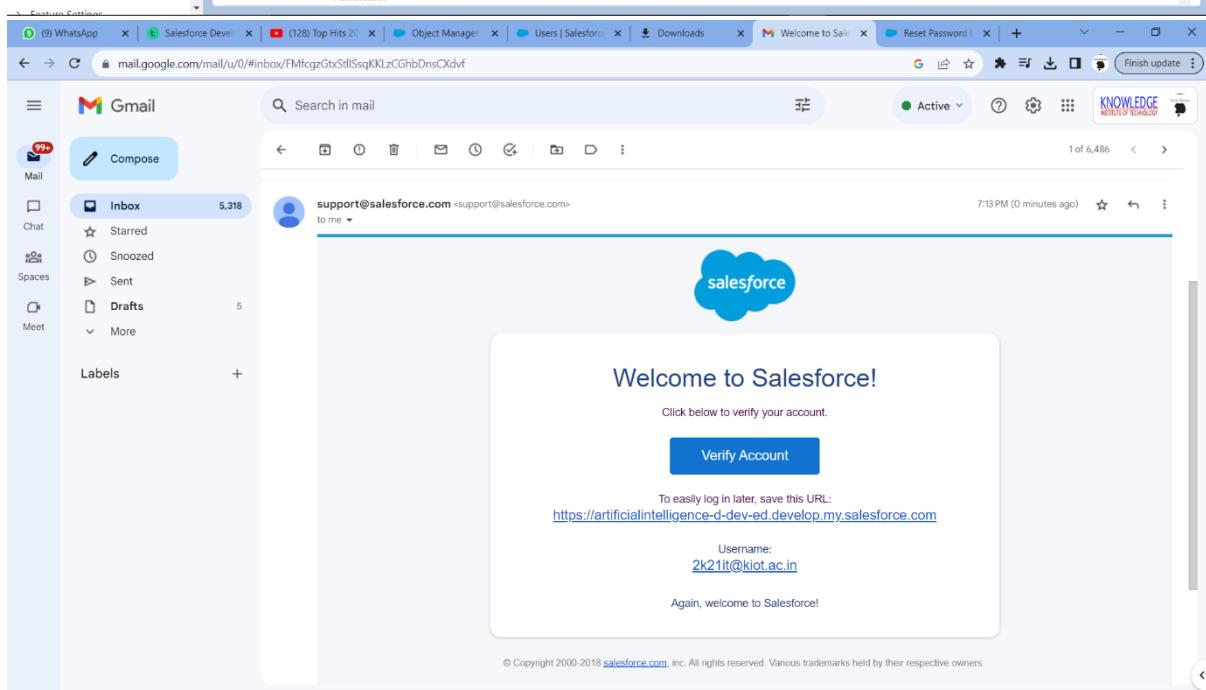
User Sowmya bala

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

User Detail

Name	sowmya bala	Role	Salesforce Platform
Alias	sbala	User License	Manager
Email	2k20case179@kiot.ac.in [Verify]	Active	<input checked="" type="checkbox"/>
Username	2k21it@kiot.ac.in	Marketing User	<input type="checkbox"/>
Nickname	User16961677128256452616	Offline User	<input type="checkbox"/>
Title	worker	Knowledge User	<input type="checkbox"/>
Company	kiot bank	Flow User	<input type="checkbox"/>
Department		Service Cloud User	<input type="checkbox"/>
Division		Site.com Contributor User	<input type="checkbox"/>
Address		Site.com Publisher User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	WDC User	<input type="checkbox"/>
Locale	English (India)	Mobile Push Registrations	<input checked="" type="checkbox"/>
Language	English	Data.com User Type	<input type="checkbox"/>
Delegated Approver		Accessibility Mode (Classic Only)	<input type="checkbox"/>
Manager	Only if I am an approver	Debug Mode	<input type="checkbox"/>
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/>
App Registration: One-Time Password Authenticator		Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>
App Registration: Salesforce Authenticator		Salesforce CRM Content User	<input checked="" type="checkbox"/>

User Profile Help for this Page



Welcome to Salesforce!

Click below to verify your account.

Verify Account

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

Username:
2k21it@kiot.ac.in

Again, welcome to Salesforce!

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(9) WhatsApp x | (1) Salesforce Dev x | (128) Top Hit x | Object Manager x | Users | Sales x | Downloads x | Welcome to x | Recently Viewed x | Change Your x + - _ Finish update

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

salesforce

Change Your Password

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

- ✓ 8 characters
- ✓ 1 letter
- ✓ 1 number

* New Password

..... Good

* Confirm New Password

..... Match

Security Question

In what city were you born?

* Answer

salem

Change Password

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

Login | Salesforce x +

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

salesforce

Username
2k21it@kiot.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

AIDay

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Recently Viewed | Bank | Salesfo... x +

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

Incognito Finish update

kiot Bank customers Home

Search...

Recently Viewed ▾

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

Bank Name ↓

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

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

DISPLAY DENSITY

✓ Comfy

Compact

OPTIONS

Switch to Salesforce Classic ⓘ

Add Username

New Bank | Salesforce x +

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/o/Bank__c/new?count=1&nooverride=1&useRecordTypeCheck=1&navigation.location=LIST_VIEW&uid=16...

Incognito Finish update

kiot Bank customers Home

Search...

Recently Viewed ▾

0 items • Updated a few seconds ago

Bank Name

New Bank

* = Required Information

Information

*Bank Name boi

Owner sowmiya bala

phoneno 0897754534

Cancel Save & New Save

New customer | Salesforce

https://artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/o/customer__c/new?count=2&nooverride=1&useRecordTypeCheck=1&navigationLocation=LIST_VIEW&ui...

Recently Viewed ▾

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

customer Name ↓

New customer

* = Required Information

Information

* customer Name: madhu

* Bank: boi

Cancel Save & New Save

madhu | customer | Salesforce

https://artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/r/customer__c/a02500000f0YfaAM/view

customer madhu was created.

Related Details

customer Name: madhu

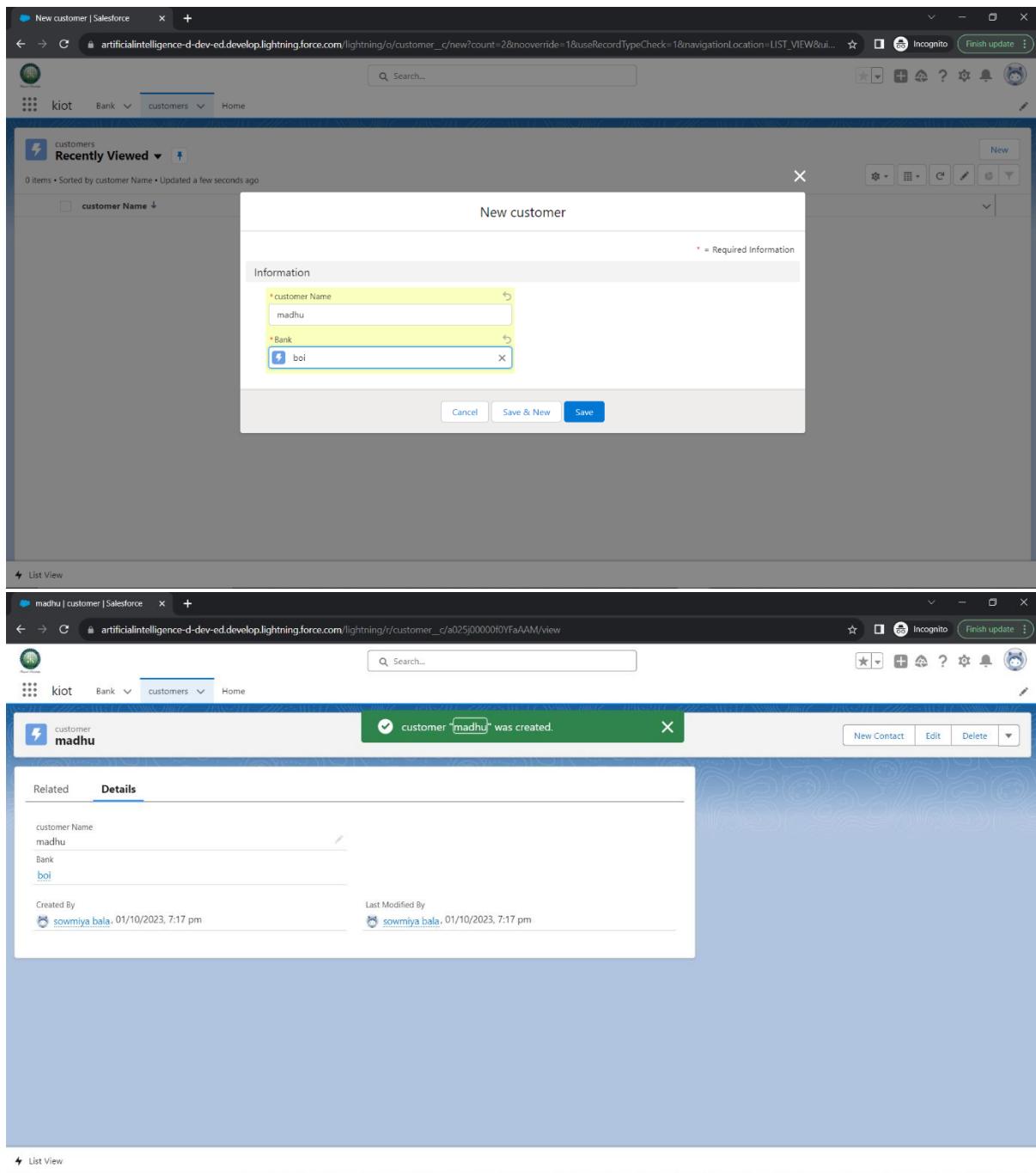
Bank: boi

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

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

New Contact Edit Delete

List View



Salesforce Developer Session 2 | Profiles | Salesforce | Welcome to Salesforce: Verify... | + | Finish update

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

Profiles

All Profiles | Edit | Delete | Create New View

New Profile

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

1.7 of 7 0 Selected | Page 1 of 1

Salesforce Developer Session 2 | Profiles | Salesforce | Welcome to Salesforce: Verify... | + | Finish update

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

Clone Profile

Enter the name of the new profile.

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

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

Save Cancel

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

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

Profiles

Profile salesmanage

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

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

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

Profile Detail

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

Page Layouts

Standard Object Layouts	Global	Operating Hours
Email Application	Global Layout [View Assignment]	Order Layout [View Assignment]
Home Page Layout	Home Page Default [View Assignment]	Order Product Layout [View Assignment]
Account	Account Layout [View Assignment]	Payment Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	Payment Authorization Layout [View Assignment]
Appointment Invitation	Appointment Invitation Layout [View Assignment]	Payment Authorization Adjustment Layout [View Assignment]
Asset	Asset Layout [View Assignment]	Payment Gateway Layout [View Assignment]

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

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

Profiles

Profile Edit salesmanage

Set the permissions and page layouts for this profile.

Profile Edit

Name	salesmanage	User License	Salesforce Platform	Description	Custom Profile
					✓

Custom App Settings

Visible	Default	Visible	Default
<input type="checkbox"/>	<input checked="" type="radio"/>	<input type="checkbox"/>	<input checked="" type="radio"/>
<input type="checkbox"/>	<input checked="" type="radio"/>	<input type="checkbox"/>	<input checked="" type="radio"/>
<input checked="" type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input checked="" type="radio"/>

Service Provider Access

Tab Settings

Overwrite users' personal tab customizations

Standard Tab Settings

Home	Default On
Accounts	Learning

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

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

Custom Object Permissions

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

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

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

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

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

Custom Object Permissions

	Basic Access	Create	Edit	Delete	Data Administration	Basic Access	Create	Edit	Data Administration	
	Read	Read	Create	Edit	View All	Modify All	Read	Read	View All	Modify All
Contact Point Emails	<input checked="" type="checkbox"/>									
User External Credentials	<input type="checkbox"/>									
Bank	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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"/>
Enhancement Requests	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

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

Save | Save & New | Cancel

Salesforce Developer Session 2 | (128) Top Hits 2023 | New Post | Users | Salesforce | Welcome to Salesforce: Verify your email | + | Finish update

Setup Home Object Manager

Search Setup

User Management Settings

New User

User Edit

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:

Offline User:

Knowledge User:

Flow User:

Service Cloud User:

Site.com Contributor User:

Site.com Publisher User:

WDC User:

Data.com User Type: -None-

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

Accessibility Mode (Classic Only):

High-Contrast Palette on Charts:

Load Lightning Pages While Scrolling:

Debug Mode:

Salesforce Developer Session 2 | (128) Top Hits 2023 | New Post | Users | Salesforce | Welcome to Salesforce: Verify your email | + | Finish update

Setup Home Object Manager

Search Setup

User Management Settings

New User

User Edit

General Information

First Name: madhu

Last Name: b

Alias: mb

Email: 2k20cse179@kiot.ac.in

Username: 2k20cse179@kiot.ac.in

Nickname: User169616842428654192

Title: worker

Company: kiot bank

Department: Sales

Division:

Role: <None Specified>

User License: Salesforce Platform

Profile: salesmanager

Active:

Marketing User:

Offline User:

Knowledge User:

Flow User:

Service Cloud User:

Site.com Contributor User:

Site.com Publisher User:

WDC User:

Data.com User Type: -None-

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

Accessibility Mode (Classic Only):

High-Contrast Palette on Charts:

Load Lightning Pages While Scrolling:

Debug Mode:

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

The screenshot shows the Salesforce Setup interface with the 'User Management Settings' section selected under 'User'. The 'Users' tab is active. The main content area displays the 'Users' configuration page with sections for 'Mailing Address', 'Single Sign On Information', 'Locale Settings', and 'Approver Settings'. The 'Mailing Address' section includes fields for Street, City, Zip/Postal Code, State/Province, and Country. The 'Single Sign On Information' section has a 'Federation ID' field. The 'Locale Settings' section shows the Time Zone as '(GMT+05:30) India Standard Time (Asia/Kolkata)', Locale as 'English (India)', and Language as 'English'. The 'Approver Settings' section includes fields for 'Delegated Approver' and 'Manager', and a dropdown for 'Receive Approval Request Emails' set to 'Only if I am an approver'. A checkbox for 'Generate new password and notify user immediately' is checked. At the bottom are 'Save', 'Save & New', and 'Cancel' buttons.

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

This screenshot is identical to the one above, showing the 'User Management Settings' page for 'Users' in the Salesforce Setup interface. The configuration fields for Mailing Address, Single Sign On Information, Locale Settings, and Approver Settings are the same, with the 'Generate new password and notify user immediately' checkbox checked. The 'Save', 'Save & New', and 'Cancel' buttons are visible at the bottom.

Screenshot of the Salesforce Developer Session 2 interface showing the User Management Settings for a user named "madhu b".

User Detail:

- Name: madhu b
- Alias: mb
- Email: 2k20csit79@kiot.ac.in [Verify]
- Username: 2k20csit@kiot.ac.in
- Nickname: User16961684242855419206
- Title: worker
- Company: kiot bank
- Department: Sales
- Division: Address: 41/94, aryanpalayam, uhamasolapuram .., Paraikkadu , salem- 636308
- Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata)
- Locale: English (India)
- Language: English
- Delegated Approver: Manager
- Receive Approval Request Emails: Only if I am an approver
- Federation ID: App Registration: One-Time Password Authenticator
- Role: User License: Active, Profile: salesmanager, Site.com Contributor User
- Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User
- Site.com Publisher User, WDC User, Mobile Push Registrations
- Data.com User Type, Accessibility Mode (Classic Only), Debug Mode, High-Contrast Palette on Charts
- Load Lightning Pages While Scrolling

Gmail inbox:

Welcome to Salesforce!

Click below to verify your account.

Verify Account

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

Again, welcome to Salesforce!

Reply Forward

Change Your Password | Salesforce

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



Change Your Password

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

- 8 characters
- 1 letter
- 1 number

* New Password
..... Good

* Confirm New Password
..... Match

Security Question
In what city were you born?

* Answer
india

Change Password

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

Recently Viewed | Bank | Salesforce

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

Recently Viewed

0 items • Updated a few seconds ago

Bank Name

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

List View

The image shows two screenshots of the Salesforce Lightning Experience.

The top screenshot displays the 'Recently Viewed' page under the 'customers' tab. The page header includes the URL https://artificialintelligence-d-dev-ed-develop.lightning.force.com/lightning/o/customer_c/list?filterName=Recent. The main content area shows a message: "You haven't viewed any customers recently. Try switching list views." There is a search bar at the top and a toolbar with various icons.

The bottom screenshot shows the 'Permission Sets' page in the 'Setup' section. The URL is <https://artificialintelligence-d-dev-ed-develop.lightning.force.com/lightning/setup/PermSets/home>. The left sidebar lists various user management categories like 'Users', 'Feature Settings', 'Data.com', 'Prospector Users', 'Service', 'Embedded Service', and 'User Interface'. The main content area is titled 'Permission Sets' and contains a table listing permission sets. The table columns are 'Action', 'Permission Set Label', 'Description', and 'License'. The table shows numerous permission sets such as 'Buyer', 'CRM User', 'Commerce Admin', 'Contact Center Admin', 'Contact Center Agent', 'Contact Center Supervisor', 'Experience Profile Manager', 'Facility Manager', 'FieldServiceMobileStandardPermSet', 'Merchandiser', 'Order Management Agent', 'Order Management Operations Manager', and 'Order Management Shopper'. A navigation bar at the bottom of the table includes links for 'All Previous Next >> Page 1 of 2'.

Step 2:

Permission Sets:

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

Object-Level Security:

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

Record-Level Security:

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

Ownership:

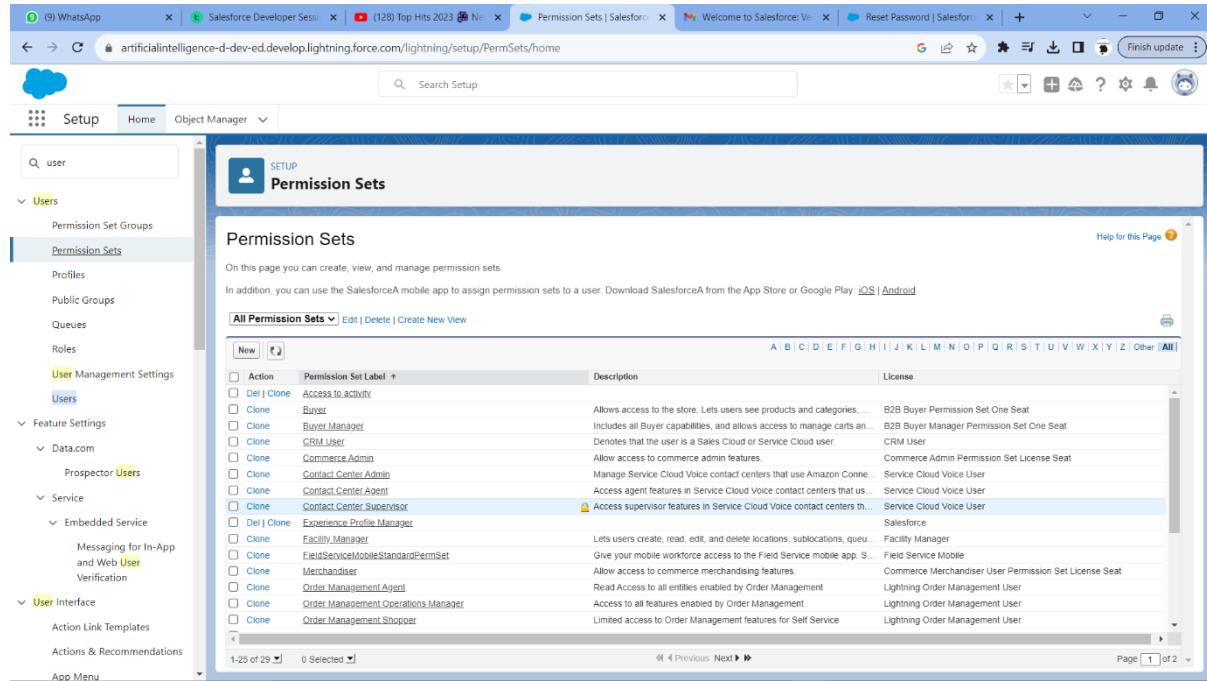
- Ensure that the Account records are owned by the respective users, with User A owning their records and User B owning their records.

Organization-Wide Defaults:

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

Testing:

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



The screenshot shows the Salesforce Setup interface with the 'Permission Sets' page open. The left sidebar is collapsed, and the main content area displays a table of permission sets. The table has columns for Action, Permission Set Label, Description, and License. The 'Description' column contains brief descriptions of the permissions granted by each set. The 'License' column indicates which license seat each set requires. The table includes rows for various roles like 'Buyer', 'CRM User', 'Commerce Admin', etc., and specific supervisor roles. The bottom of the page shows pagination controls and a note about mobile app availability.

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

The screenshot shows the Salesforce Setup interface with the 'Permission Sets' tab selected. On the left, the navigation sidebar is open, showing categories like 'Users', 'Feature Settings', 'Data.com', 'Service', 'User Interface', and 'App Menu'. The 'Users' section is expanded, showing sub-options such as 'User Management Settings' and 'Prospector Users'. The main content area displays the 'Permission Set Create' page. The 'Enter permission set information' section requires the 'Label' (set to 'user') and 'API Name' (set to 'user'). The 'Description' field is empty. The 'Session Activation Required' checkbox is unchecked. Below this, the 'Select the type of users who will use this permission set' section includes a note about who will use the permission set ('None') and options for assigning it to multiple users or specific user or permission set licenses. The 'License' dropdown is set to '-None-'.

This screenshot is identical to the one above, except the 'Label' field now contains 'salesmanager' and the 'API Name' field also contains 'salesmanager'. All other fields and settings remain the same as in the first screenshot.

Screenshot of the Salesforce Setup interface showing the Permission Sets page.

Permission Set Overview:

Setting	Description
API Name	salesmanager
Namespace Prefix	GOPALS_
Created By	GOPALS_ 01/10/2023, 7:29 pm

Apps:

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

Screenshot of the Salesforce Setup interface showing the Permission Sets page.

Object Settings:

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

Salesforce Developer Session | WhatsApp | Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce: Version 43.0 | 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

Data.com

Prospector Users

Service

Embedded Service

Messaging for In-App and Web User Verification

User Interface

Action Link Templates

Actions & Recommendations

Permission Set salesmanager

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

Permission Set Overview > Object Settings Bank

Bank

Tab Settings

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

Object Permissions

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

Field Permissions

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

Video Tutorial | Help for this Page

<https://artificialintelligence-d-dev-ed-develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0P55j000008Phok%3Fs%3DEntityPermissions%26o%3D...>

Salesforce Developer Session | WhatsApp | Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce: Version 43.0 | 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

Data.com

Prospector Users

Service

Embedded Service

Messaging for In-App and Web User Verification

User Interface

Action Link Templates

Actions & Recommendations

App Menu

Permission Set salesmanager

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

Permission Set Overview > Object Settings Bank

Bank

Tab Settings

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

Object Permissions

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

Field Permissions

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

Video Tutorial | Help for this Page

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

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

Setup Home Object Manager

Search Setup

User salesmanager

Current Assignments

No assignments defined.

This screenshot shows the Salesforce Setup interface for managing users. The left sidebar is expanded to show the 'Users' section under 'User Management Settings'. The main area is titled 'salesmanager' and shows the 'Current Assignments' section, which displays a cactus and sun illustration and a message stating 'No assignments defined.' There are buttons for 'Edit', 'Delete', and 'Add Assignment'.

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

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

Setup Home Object Manager

Search Setup

Select Users to Assign

All Users

1 item selected

Full Name ↑	All... ↓	Username	Role	Ac... ↓	Profile
Amelia Ellington	aelli	amelia.ellington.146kxcp9oodih.d6cwpdcuo4wh.hnbdwvwvhq.wguctpr1dalv@gmail.com	<input checked="" type="checkbox"/>	Force.com - App Subscription User	<input type="button" value="▼"/>
Chatter Expert	Chatty	chatty.00d5j00000bcskkkeab.lo0bfwmpqike@chatter.salesforce.com	<input checked="" type="checkbox"/>	Chatter Free User	<input type="button" value="▼"/>
Diya Adanna	dadan	test_diya_pas.4w8bjybi9wik.tszgrgsbkbpx.3gi8ofovzwns.h43bkzw6mea@gmail.com	<input checked="" type="checkbox"/>	UMS User	<input type="button" value="▼"/>
GOPAL S	GS	kiot520@gmail.com	<input checked="" type="checkbox"/>	System Administrator	<input type="button" value="▼"/>
Integration User	integ	integration@00d5j00000bcskkkeab.com	<input checked="" type="checkbox"/>	Analytics Cloud Integration User	<input type="button" value="▼"/>
madhu b	mb	2k20csit@kiot.ac.in	<input checked="" type="checkbox"/>	salesmanage	<input type="button" value="▼"/>
Security User	sec	insightssecurity@00d5j00000bcskkkeab.com	<input checked="" type="checkbox"/>	Analytics Cloud Security User	<input type="button" value="▼"/>
sowmya bala	sbala	2k21it@kiot.ac.in	<input checked="" type="checkbox"/>	Manager	<input type="button" value="▼"/>

Cancel Next

This screenshot shows the 'Select Users to Assign' dialog box. It lists several users with their full names, usernames, and profiles. One user, 'madhu b', has a checked checkbox next to it, indicating they are selected for assignment. The dialog includes a search bar at the top and buttons for 'Cancel' and 'Next' at the bottom.

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

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

Setup Home Object Manager

Select an Expiration Option For Assigned Users

No expiration date

Specify the expiration date

1 Day 1 Week 30 Days 60 Days Custom Date

Time Zone Select a time zone...

Selected Users

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

Cancel Back Assign

This screenshot shows the 'Select an Expiration Option For Assigned Users' page in the Salesforce Setup. It displays a table of selected users, with one user ('madhu b') assigned to the 'salesmanager' profile. The user has a 'Salesforce Platform' license and 'Never Expires'. The 'Expires On' column is set to 'Never Expires'.

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

artificialintelligence-d-dev-ed.lightning.force.com/one/one.app#eyjjb21wb25lbREZWYiOjUzZXR1cF9wbGF0Zm9ybV9wZXItczpwc2FSZXN1bHRQYWdliw...

Setup Home Object Manager

PERMISSION SET 'SALESMANA' 1 assignments were successful.

salesmanager

Assignment Summary

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

Done

This screenshot shows the 'Assignment Summary' page after the permission set assignment was completed. A success message indicates '1 assignments were successful.' The summary table shows the user 'madhu b' assigned to the 'Salesforce Platform' license with a status of 'Success'.

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

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

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

Incognito (3) [Finish update](#)

kiot Bank customers Home

Search...

Recently Viewed

customers

Recently Viewed

0 items • Updated a few seconds ago

customer Name

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

LIST VIEW CONTROLS

New

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

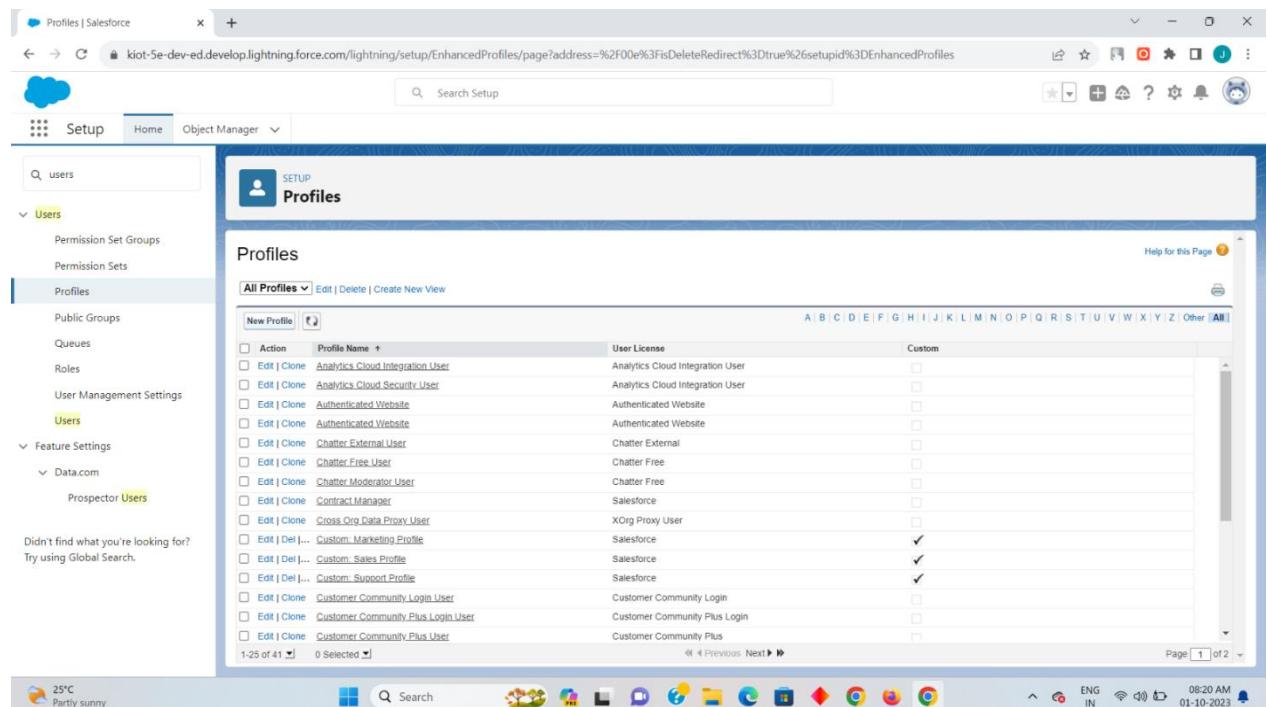
javascript:void(0)

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

Solution:

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

Setup-quick search[profile]

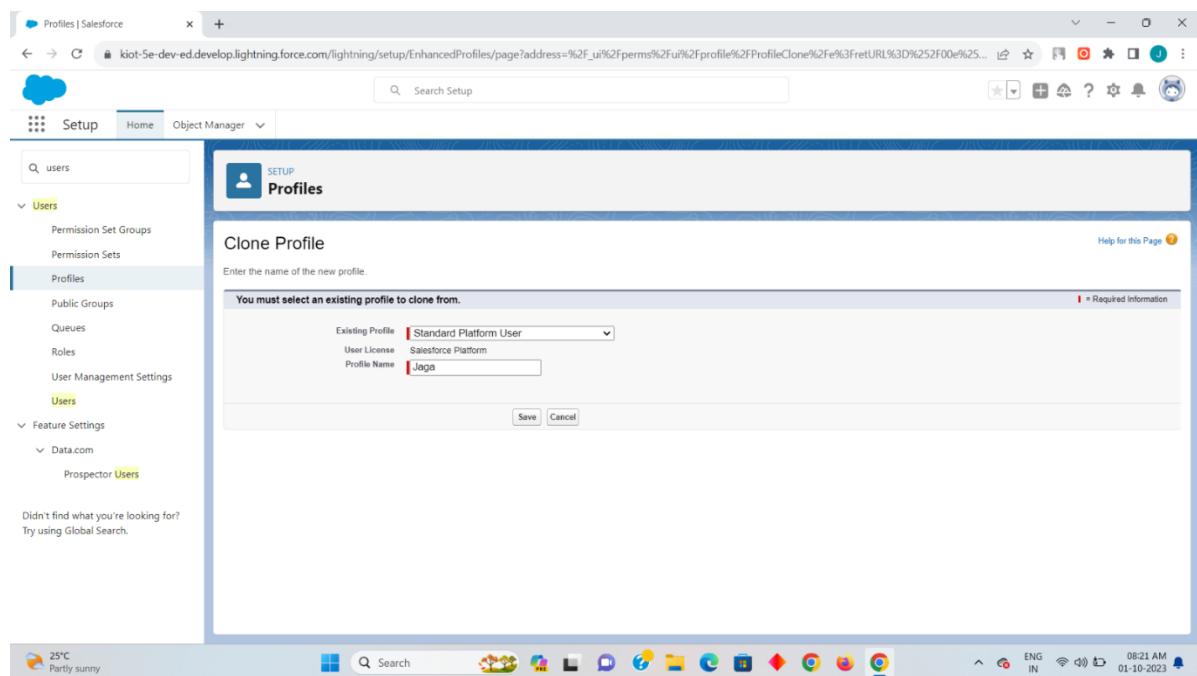


The screenshot shows the Salesforce Setup interface with the following details:

- Page Header:** Profiles | Salesforce
- Search Bar:** Search Setup
- Left Navigation:** Setup, Home, Object Manager, Users (selected), Profiles, Public Groups, Queues, Roles, User Management Settings, Feature Settings, Data.com, Prospector.
- Central Content:** **Profiles** page. The title bar includes "All Profiles" and "Edit | Delete | Create New View". A "Help for this Page" link is also present.
- Table:** A list of profiles with columns: Action, Profile Name, User License, and Custom. Some profiles have checkboxes next to them. Examples include:
 - Analytics Cloud Integration User (User License: Analytics Cloud Integration User)
 - Analytics Cloud Security User (User License: Analytics Cloud Integration User)
 - Authenticated Website (User License: Authenticated Website)
 - Chatter External User (User License: Chatter External)
 - Chatter Free User (User License: Chatter Free)
 - Chatter Moderator User (User License: Chatter Free)
 - Contract Manager (User License: Salesforce)
 - Cross Org Data Proxy User (User License: XOrg Proxy User)
 - Custom Marketing Profile (User License: Salesforce)
 - Custom Sales Profile (User License: Salesforce)
 - Custom Support Profile (User License: Salesforce)
 - Customer Community Login User (User License: Customer Community Login)
 - Customer Community Plus Login User (User License: Customer Community Plus Login)
 - Customer Community Plus User (User License: Customer Community Plus)
- Page Footer:** Includes weather information (25°C, Partly sunny), a search bar, and various system icons.
- Page Bottom:** Shows the date (01-10-2023) and time (08:20 AM).

Step 2:

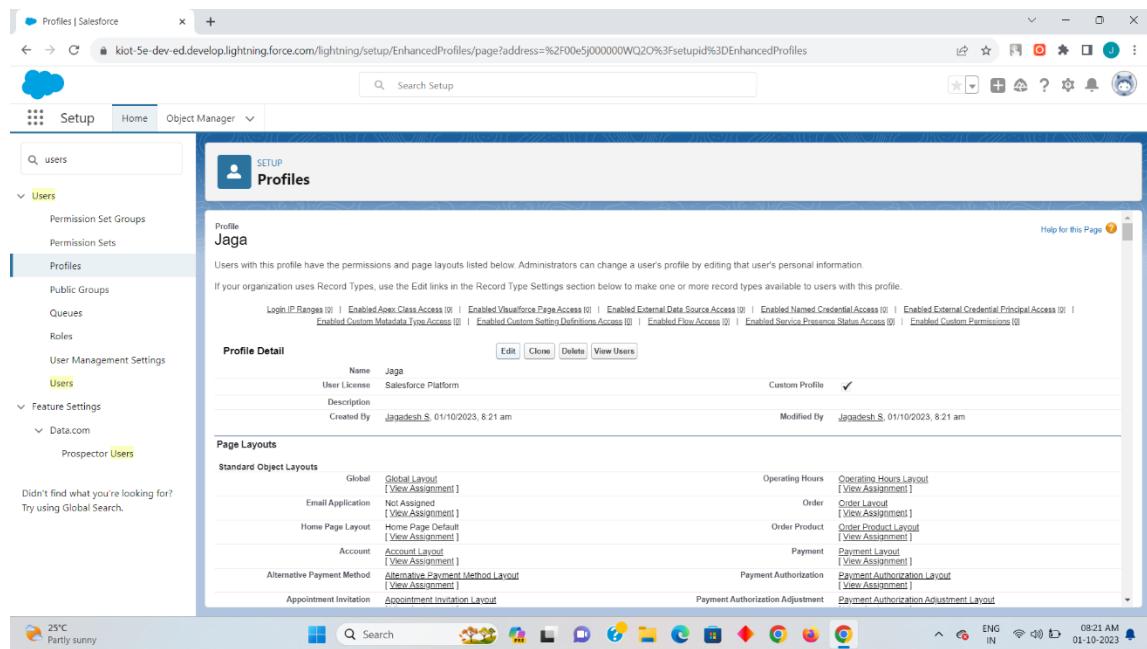
Click on the new to create a new profile along with the label and Api



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

Step 3:

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



Profiles | Salesforce

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

Setup Home Object Manager

Search Setup

Users

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

Users

- Feature Settings
- Data.com
- Prospector Users**

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

25°C Partly sunny

SETUP Profiles

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

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

Custom Object Permissions

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

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Enable different Experience Cloud login policies for employees: Separate Experience Cloud site and Salesforce login authentication for employees. Relax login IP restrictions. Skip employee device activation during Experience Cloud site login.

25°C Partly sunny

ENG IN 08:21 AM 01-10-2023

Profiles | Salesforce

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

Setup Home Object Manager

Search Setup

Users

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

Users

- Feature Settings
- Data.com
- Prospector Users

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

25°C Partly sunny

SETUP Profiles

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

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

Custom Object Permissions

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

Session Settings

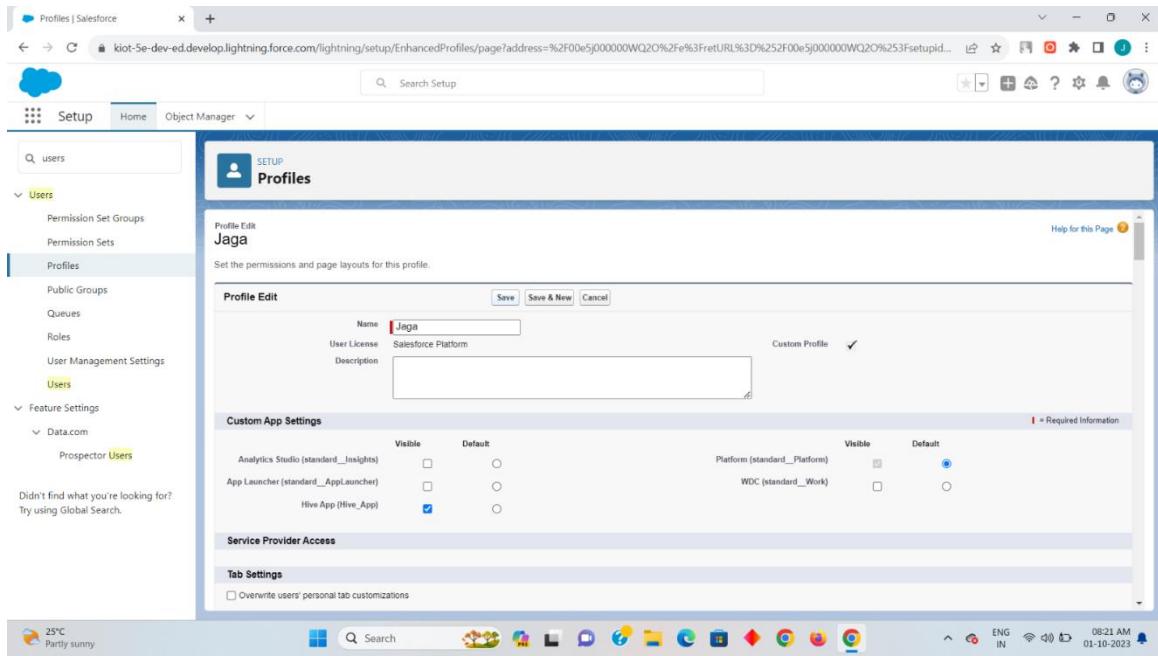
Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Enable different Experience Cloud login policies for employees: Separate Experience Cloud site and Salesforce login authentication for employees. Relax login IP restrictions. Skip employee device activation during Experience Cloud site login.

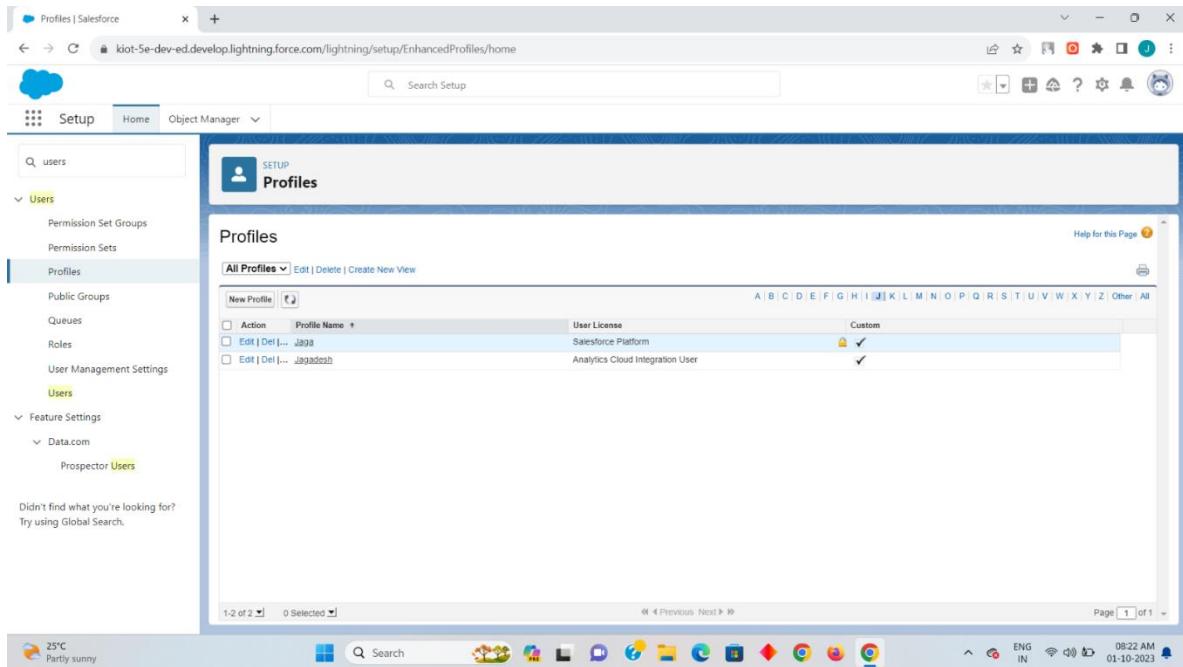
25°C Partly sunny

ENG IN 08:21 AM 01-10-2023



Step 4

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



Step 5:

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

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

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty00d500000c0joseaf.6z10krkhd4@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	Jgrey_Jane	Jgrey	jane_gray.fygnimmoalm.c27d2kogta@gmail.com		<input checked="" type="checkbox"/>	Customer Community User
<input type="checkbox"/> Edit	S_Jaga	JS	jaga098@gmail.com	CEO	<input type="checkbox"/>	Standard Platform User
<input type="checkbox"/> Edit	S_Jagadesh	JS	wow@gmail.com	SF Admin	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	S_Jagadesh	JS	jaga1117@gmail.com	Channel Sales Team	<input type="checkbox"/>	Standard Platform User
<input type="checkbox"/> Edit	User_Integration	Integ	integration@00d500000c0joseaf.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightssecurity@00d500000c0joseaf.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

The screenshot shows two consecutive screenshots of the Salesforce Setup interface.

Screenshot 1: New User Creation

This screenshot shows the "New User" page under the "Users" section of the Setup menu. The "General Information" tab is selected. The user details are as follows:

Field	Value
First Name	Jagadesh22
Last Name	S
Alias	JS
Email	jaa1@gmail.com
Username	jaa1@gmail.com
Nickname	User169612879963619745
Title	
Company	
Department	
Division	

The "Role" dropdown is set to "Marketing Team". Other settings include "User License: Salesforce Platform", "Profile: Standard Platform User", and "Active: Jagaa".

Screenshot 2: All Users List

This screenshot shows the "All Users" page under the "Users" section. It lists four users:

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	S Jagade	JS	jaa99@gmail.com	CEO	<input type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	S Jagadeesh	JS	voiva@gmail.com	SP Admin	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	S Jagadeesh11	JS	jaa111@gmail.com	Channel Sales Team	<input checked="" type="checkbox"/>	Standard Platform User
<input checked="" type="checkbox"/>	S Jagadeesh22	JS	jaa123@gmail.com	Director_Channel Sales	<input checked="" type="checkbox"/>	jaga
<input checked="" type="checkbox"/>	S Jagadeesh22	JS	last@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	jaa12

Now you can preview your two user that you have created in my side I had create the two users a Jagadeesh11 and Jagadeesh22 as a director channel sales with the marketing team.

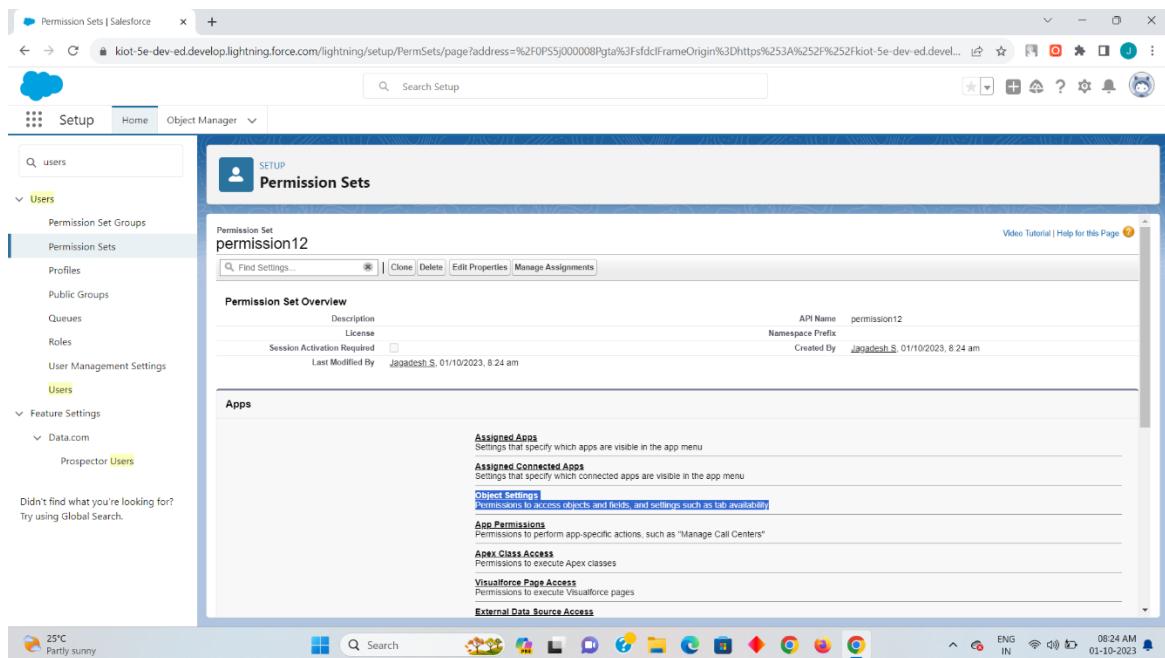
Step 6:

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

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

The screenshot shows the Salesforce 'Permission Sets' page. The left sidebar is collapsed, and the main area displays a table of permission sets. The table has columns for Action, Permission Set Label, Description, and License. The 'Action' column contains checkboxes for 'Clone'. The 'Permission Set Label' column lists various roles and profiles. The 'Description' column provides a brief overview of each role's permissions. The 'License' column indicates the license type for each role. The table is paginated at the bottom, showing page 1 of 2.

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



The screenshot shows the Salesforce Setup interface with the 'Permission Sets' page open. The left sidebar is collapsed, and the main area displays the 'Object Settings' for the permission set 'permission12'. The table lists object names, their current permission status (No Access), total fields, and tab settings.

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

The screenshot shows the 'Accounts' tab for the permission set 'permission12' in the Salesforce Setup interface. The 'Object Permissions' section lists various permissions for the 'Account' object, such as Read, Create, Edit, Delete, View All, and Modify All. The 'Field Permissions' section below shows specific field-level access for fields like Account Name, Account Number, Account Owner, Account Site, and Account Source.

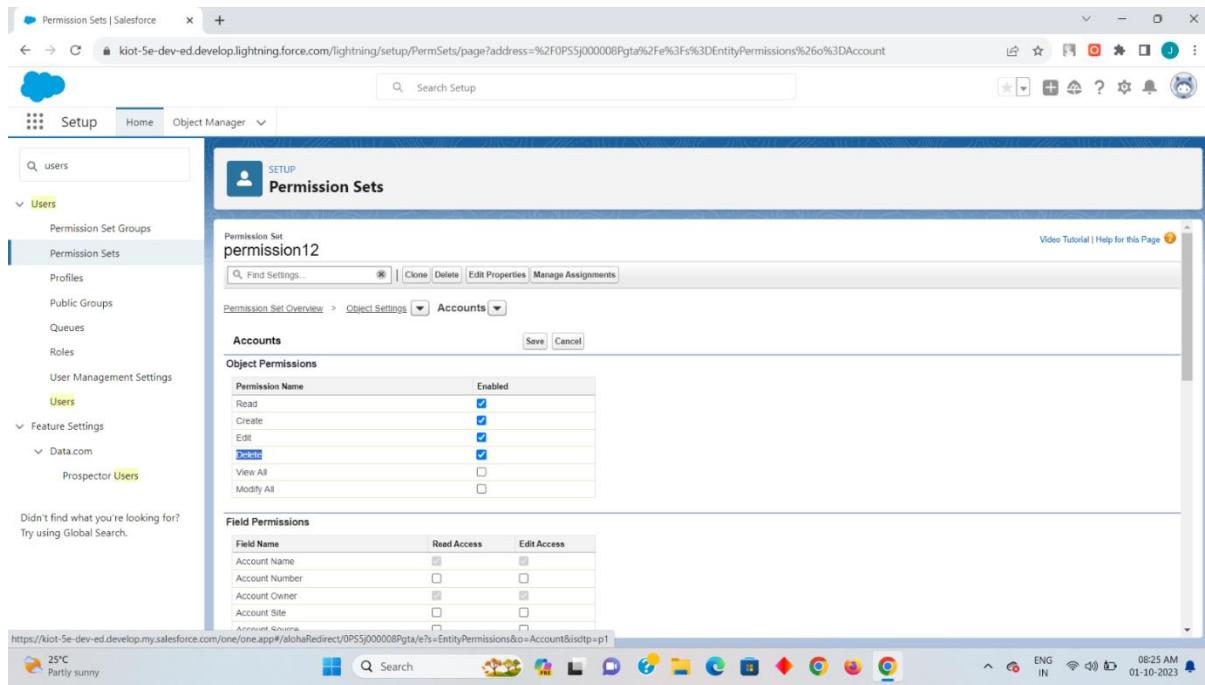
Permission Name	Enabled
Read	<input type="checkbox"/>
Create	<input type="checkbox"/>
Edit	<input type="checkbox"/>
Delete	<input type="checkbox"/>
View All	<input type="checkbox"/>
Modify All	<input type="checkbox"/>

Field Name	Read Access	Edit Access
Account Name	<input type="checkbox"/>	<input 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 type="checkbox"/>	<input type="checkbox"/>

Step 7:

Now to give the specific delete access to the user click on edit on the Account and then

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



Step 8

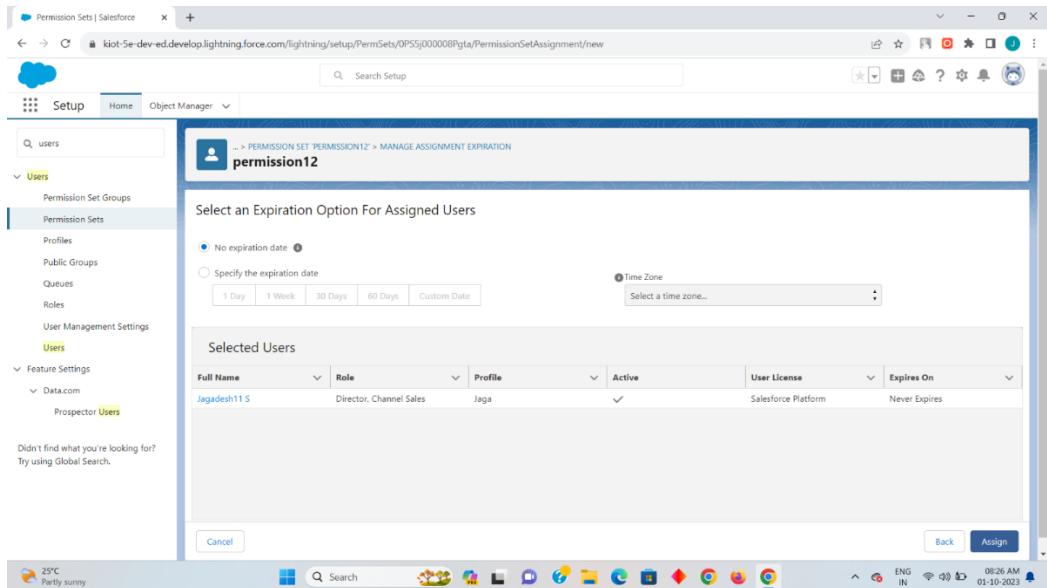
Now click on add assignment there you will find your two created users click on any one user to give a special access as delete on it and then click on assign so that the specific selected user can have a special access as delete on it.

The screenshot shows the 'Permission Sets | Salesforce' page. The left sidebar is expanded, showing 'Users' selected under 'Permission Sets'. The main content area is titled 'permission12' and shows a section titled 'Current Assignments' with a cactus and sun icon. Below it, a message says 'No assignments defined.' A small note at the bottom left says 'Didn't find what you're looking for? Try using Global Search.'

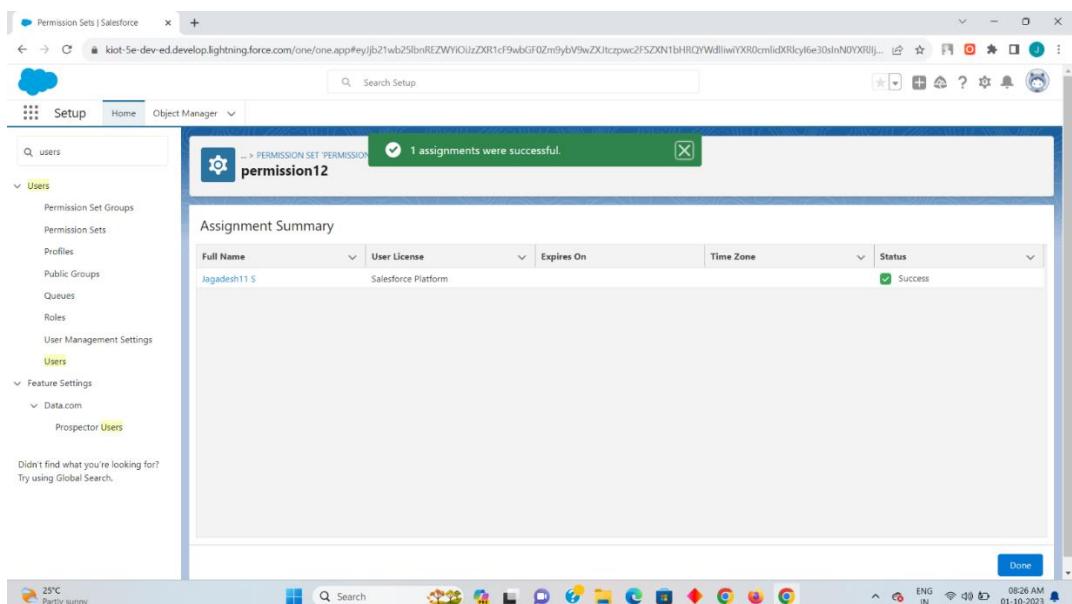
This screenshot shows the 'PERMISSION SET permission12 > MANAGE ASSIGNMENT EXPIRATION' dialog. It has a header 'permission12' and a sub-header 'Select Users to Assign'. A search bar at the top right contains 'jagadesh'. The main table lists four users: Jagadesh S, Jagadesh S, Jagadesh11 S, and Jagadesh22 S. The 'Jagadesh11 S' row is highlighted with a blue selection box around its entire row. A tooltip above the table says 'Roles, Alias, and Profile aren't searchable. Use filters or sort on these fields instead.' Buttons for 'Cancel' and 'Next' are at the bottom.

This screenshot shows the same 'PERMISSION SET permission12 > MANAGE ASSIGNMENT EXPIRATION' dialog. The 'Jagadesh11 S' row is now fully selected, indicated by a blue box around the entire row. The 'Next' button is visible at the bottom right of the dialog.

Click on next.



Now click on Assign.



Now the specific access for the Jagadeth11 user has been assigned successfully.

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

Solution:

Step 1: Create a Custom Object

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

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

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

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

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

5. Create a template like the following screenshot.

The screenshot shows the 'Email Template' page in Salesforce. The title bar says 'Email Template' and 'Thank You Email - Survey'. On the right, there are buttons for 'Edit in Builder', 'Edit', 'Clone', and a dropdown. Below the title, there are two tabs: 'Details' (selected) and 'Related'. The 'Information' section contains fields for 'Email Template Name' (set to 'Thank You Email - Survey'), 'Related Entity Type' (set to 'Survey Result'), 'Description' (set to 'Public Email Templates'), and a checkbox 'Made in Email Template Builder' which is checked. The 'Message Content' section has a 'Subject' field ('Thank You For Completing Our Survey!') and an 'HTML Value' field containing the following text:

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

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

Step 3: Create an Email Alert

1. Click **Setup**.
2. In the Quick Find box, type **Email Alerts**.

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

Edit Email Alert
Survey - Thank You Email

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

Email Alert Edit		Save	Save & New	Cancel
Edit Email Alert				
Description	Survey - Thank You Email			
Unique Name	Survey_Thank_You_Email i			
Object	Survey Result			
Email Template	Thank You Email - Survey o			
Protected Component	<input type="checkbox"/>			
Recipient Type	Search: User <input type="button" value="Find"/> for:			
Recipients	Available Recipients User: Integration User User: Rakesh Gupta User: Security User Add <input type="button" value=">"/> <input type="button" value="<"/> Remove			
You can enter up to five (5) email addresses to be notified. Additional Emails <input type="text"/>				
From Email Address	Current User's email address <input type="button" value="o"/> <input type="checkbox"/> Make this address the default From email address for this object's email alerts. i			
<input type="button" value="Save"/> <input type="button" value="Save & New"/> <input type="button" value="Cancel"/>				

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

1. Click **Setup**.
2. In the Quick Find box, type **Flows**.
3. Select **Flows** then click on the **New Flow**.
4. Select the **Screen Flow** option and click on **Next** and configure the flow as follows:
 1. How do you want to start building: Freeform

5. We will use the **Screen** element to capture a **Survey response** form. Drag and drop a **Screen** element onto the canvas.

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

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

1. **Field: Email__c**
2. **Value: {!Email.value}**
4. Click **Add Row**
5. Row 3:
 1. **Field: Name__c**
 2. **Value: {!Name.firstName}**
{!Name.lastName}
6. Click **Add Row**
7. Row 3:
 1. **Field: Rating__c**
 2. **Value: {!Rating}**
7. Click **Done.**

Edit Create Records

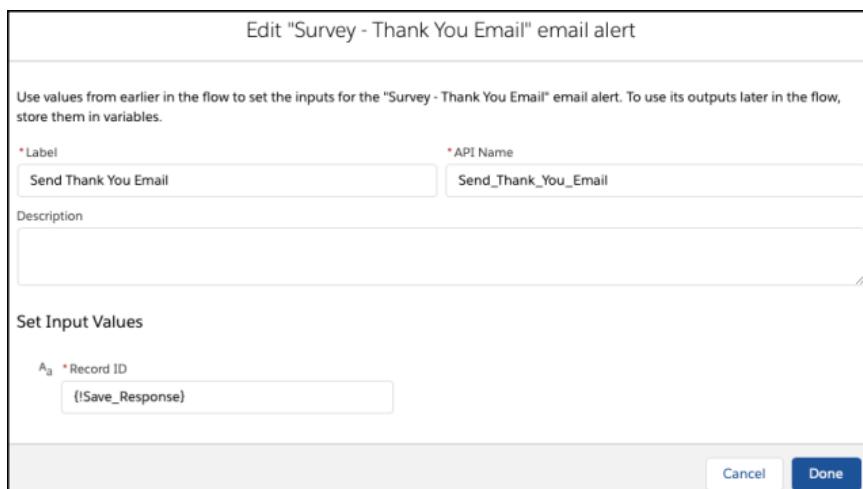
Create Salesforce records using values from the flow.

* Label	* API Name										
Save Response	Save_Response										
Description											
<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> <input type="text" value="Survey Result"/>											
<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="Aa Comment"/></td> </tr> <tr> <td>Email__c</td> <td><input type="text" value="Aa Email > Value"/></td> </tr> <tr> <td>Name__c</td> <td><input type="text" value="(!Name.firstName) (!Name.lastName)"/></td> </tr> <tr> <td>Rating__c</td> <td><input type="text" value="Aa Rating"/></td> </tr> </table> <p>+ Add Field</p> <p><input type="checkbox"/> Manually assign variables</p>		Field	Value	Comment__c	<input type="text" value="Aa Comment"/>	Email__c	<input type="text" value="Aa Email > Value"/>	Name__c	<input type="text" value="(!Name.firstName) (!Name.lastName)"/>	Rating__c	<input type="text" value="Aa Rating"/>
Field	Value										
Comment__c	<input type="text" value="Aa Comment"/>										
Email__c	<input type="text" value="Aa Email > Value"/>										
Name__c	<input type="text" value="(!Name.firstName) (!Name.lastName)"/>										
Rating__c	<input type="text" value="Aa Rating"/>										
Cancel Done											

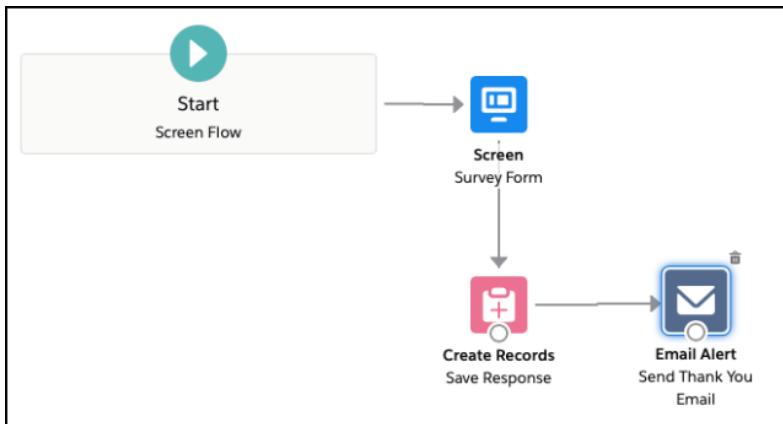
Step 4.3: Salesforce Flow — Call an Action — Email Alert to Send Out Thank You Email

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

1. Under **Toolbox**, select **Element**.
2. Drag-and-drop **Action** element onto the Flow designer.
3. In the **Action** box, type **Survey – Thank You Email**.
4. Clicks on the **Survey – Thank You Email** email alert.
5. Click **Done**.



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



1. Click **Save**.
2. Enter **Flow Label** the **API Name** will auto-populate.
3. Click **Show Advanced**.
4. **How to Run the Flow: User or System Context—Depends on How Flow is Launched**
5. **Type: Screen Flow**
6. **API Version for Running the Flow: 51**
7. **Interview Label: Survey {!\$Flow.CurrentDateTime}**
8. Click **Save**.

Save as

A New Version A New Flow

* Flow Label Survey * Flow API Name Survey

Description

Hide Advanced

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

* Type Screen Flow

* API Version for Running the Flow 51

Interview Label Insert a resource... Survey {!\$Flow.CurrentDateTime}

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

Status: Active Type: Screen Flow Version Number: 2

Cancel Save

The screenshot shows the 'Survey' flow configuration in the Salesforce developer console. Key details include:

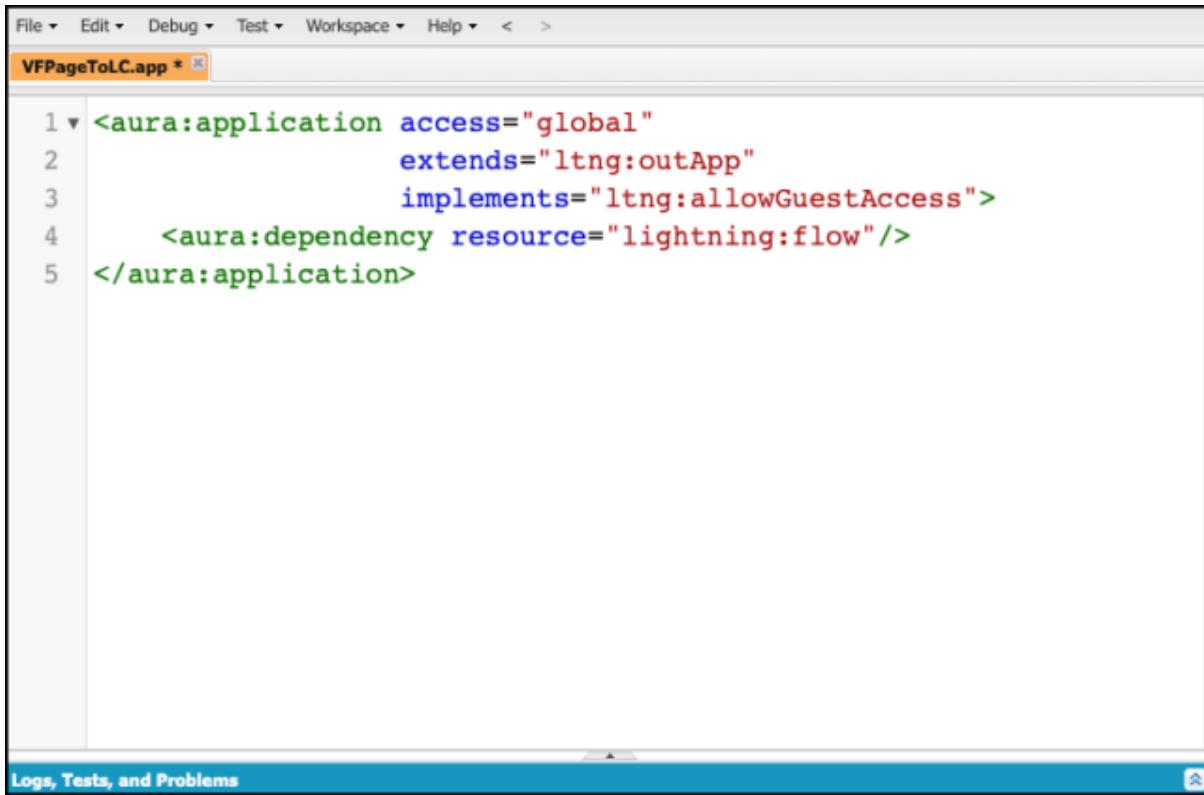
- Flow Label:** Survey
- Flow API Name:** Survey
- Type:** Screen Flow
- API Version for Running the Flow:** 51
- Interview Label:** Survey {!\$Flow.CurrentDateTime}
- Status:** Active
- Type:** Screen Flow
- Version Number:** 2

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

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

1. Click Setup | Developer Console

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



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

- Toolbar:** File, Edit, Debug, Test, Workspace, Help.
- File List:** VFPageToLC.app *
- Code Editor:** Displays the following XML code:

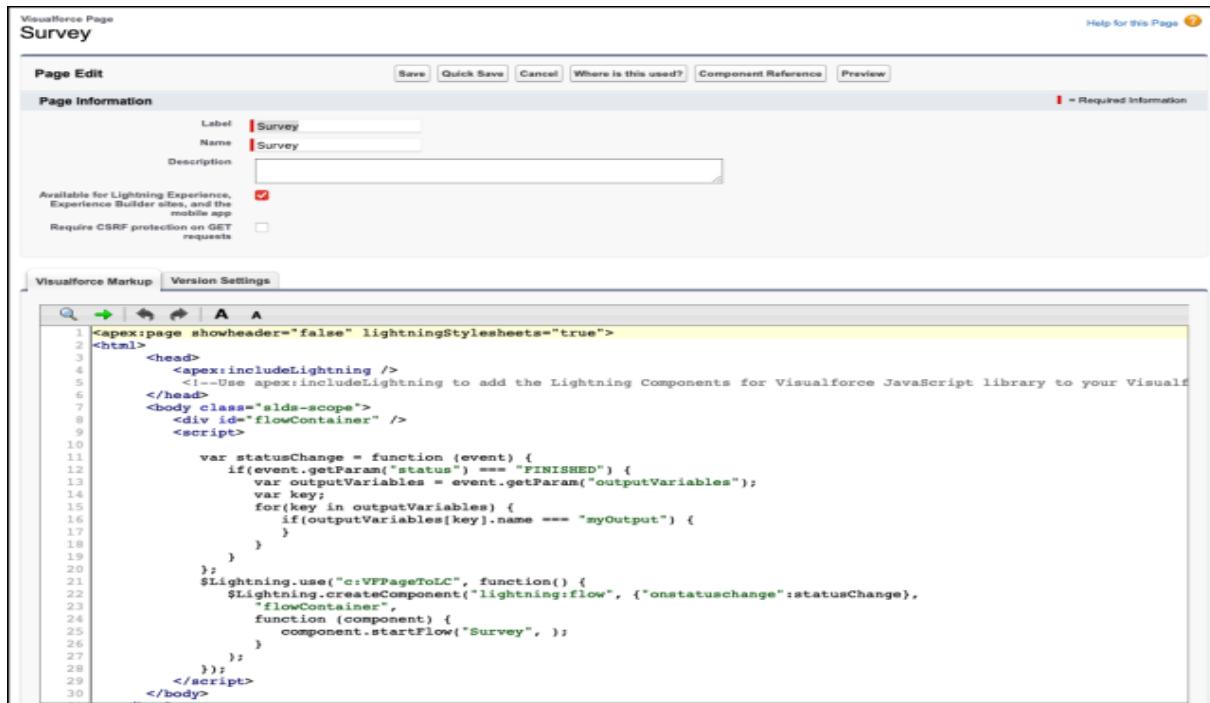
```
1 <aura:application access="global"
2             extends="ltng:outApp"
3             implements="ltng:allowGuestAccess">
4             <aura:dependency resource="lightning:flow"/>
5 </aura:application>
```
- Bottom Bar:** Logs, Tests, and Problems.

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

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

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

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



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

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

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

Site Edit

Save Cancel

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

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

Proof of Concept

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

Survey

Name

First Name
Alok

Last Name
Sinfal

*Email
[REDACTED]

*Rating
5

*Comment
Awesome Blog 

Next

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

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

 **Survey Site Guest User** via [bj9amq6fe7r.b-cdzwmaa.gs0.bnc.salesforce.com](#)
to me 

8:09 PM (1 minute ago)   

Hi Alok Sinfal,

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

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

Thanks,
Automation Champion