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Assignment no 1

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

Solution:

Step 1: Create Custom Objects

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

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

Cloud
Setup
Home
Object Manager
New Custom Object
Help for this Page

SETUP
Object Manager

New Custom Object

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

Custom Object Definition Edit

Custom Object Information

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

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

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

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

Context-Sensitive Help Setting

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

Content Name

Enter Record Name Label and Format

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

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

Save
Save & New
Cancel

Step 2: Create a Master-Detail Relationship

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

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

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

Object Manager: CDepartment

Details tab selected.

Fields & Relationships section:

- Description
- API Name: CDepartment__c
- Custom: ✓
- Singular Label: CDepartment
- Plural Label: CDepartments

Enable Reports, **Track Activities**, **Track Field History**, **Deployment Status** (Deployed), **Help Settings**, and **Standard salesforce.com Help Window** are listed.

Edit and **Delete** buttons are at the top right.

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

Object Manager: CDepartment

Fields & Relationships tab selected.

New Relationship step 3 of 6: Enter the label and name for the lookup field.

Field Label: college

Field Name: college

Description: (empty)

Help Text: (empty)

Child Relationship Name: CDepartments

Sharing Setting:
Select the minimum access level required on the Master record to create, edit, or delete related Detail records:
 Read Only: Allows users with at least Read access to the Master record to create, edit, or delete related Detail records.
 Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.

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

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

Lookup Filter button is at the bottom.

The screenshot shows the Salesforce Setup interface for creating a new relationship. The top navigation bar includes 'Setup', 'Home', 'Object Manager', and a search bar. The main title is 'CDepartment New Relationship'. On the left, a sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The current section is 'Fields & Relationships'. The main content area is titled 'Step 2. Choose the related object' and shows a dropdown menu set to 'college'. A progress bar at the top right indicates 'Step 2 of 6'. Navigation buttons 'Previous', 'Next', and 'Cancel' are at the bottom right.

The screenshot shows the Salesforce Setup interface for creating a new custom field. The top navigation bar includes 'Setup', 'Home', 'Object Manager', and a search bar. The main title is 'CDepartment New Custom Field'. The left sidebar shows the 'Fields & Relationships' category is selected. The main content area is titled 'Step 1. Choose the field type' and displays a 'Data Type' section. Under 'Data Type', the 'Master-Detail Relationship' option is selected. A detailed description of this field type is provided, mentioning it creates a parent-child relationship between the master record and detail records. Other options like 'None Selected', 'Auto Number', 'Formula', 'Roll Up Summary', and 'External Lookup Relationship' are also listed. A progress bar at the top right indicates 'Step 1'. Navigation buttons 'Next' and 'Cancel' are at the bottom right.

Step 3: Create the Roll-Up Summary Field

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

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

Setup > OBJECT MANAGER

CDepartment

Details		Fields & Relationships				
		4 items, Sorted by Field Label				
		FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Fields & Relationships		college	college__c	Master-Detail(college)		✓
Page Layouts		Created By	CreatedById	Lookup(User)		
Lightning Record Pages		Department Name	Name	Text(80)		✓
Buttons, Links, and Actions		Last Modified By	LastModifiedById	Lookup(User)		
Compact Layouts						
Field Sets						
Object Limits						
Record Types						
Related Lookup Filters						
Restriction Rules						
Scoping Rules						
Triggers						
Flow Triggers						
Validation Rules						

Setup > Tabs

Tabs

Custom Tabs

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

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce 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.

Step 5. Add to page layouts

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

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

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

Add Field Page Layout Name
 college Layout

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

Step 4. Establish field-level security

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

Setup > OBJECT MANAGER college

New Custom Field

Step 3. Define the summary calculation Step 3 of 5

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

Select Roll-Up Type
 COUNT
 SUM
 MIN
 MAX
Field to Aggregate: None

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

Previous Next Cancel

Setup > OBJECT MANAGER college

New Custom Field

Step 2. Enter the details Step 2 of 5

Field Label: Total count
Field Name: Total_count
Description:
Help Text:
Auto add to custom report type Add this field to existing custom report types that contain this entity

Previous Next Cancel

Setup > OBJECT MANAGER college

Details

Fields & Relationships

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

New Custom Field

Step 1. Choose the field type

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

Data Type

Roll Up Summary

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

Lookup Relationship

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

Master-Detail Relationship

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

- The relationship field is required on the master object.
- The ownership and visibility of detail records are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

External Lookup Relationship

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

Boolean

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

Help for this Page

Step 1

Next **Cancel**

Fields & Relationships

4 items, Sorted by Field Label

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)		✓

Quick Find **New** **Deleted Fields** **Field Dependencies** **Set History Tracking**

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.

Setup Home Object Manager

Search Setup

User Interface Rename Tabs and Labels Tabs

New Custom Object Tab Step 2 of 3

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

Apply one tab visibility to all profiles [Default On] Apply a different tab visibility for each profile

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

Previous Next Cancel

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 Step 1 of 3

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

Object	CDepartment
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-
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Enter a short description

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

New Lightning App New Connected App

The screenshot shows the Salesforce Setup interface with the '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 a table for 'Custom Object Tabs' with columns for Action, Label, Tab Style, and Description. It lists tabs like 'Book1' (Box), 'Departments' (Lightning), 'colleges' (Jewel), 'Research_Proposal' (Square), and 'student' (Box). Below this are sections for 'Web Tabs', 'Visualforce Tabs', 'Lightning Component Tabs', and 'Lightning Page Tabs', each stating 'No [Tab Type] 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 includes fields for 'App Name' (My college), 'Developer Name' (My_college), and 'Description' (Enter a description...). It also features 'App Branding' with an image of a green circular logo with a graduation cap icon and the text 'Beyond Knowledge', and a color picker for 'Primary Color Hex Value' (#217AC7). A checkbox 'Use the app's image and color instead of the org's custom theme' is checked. The bottom of the screen shows the Salesforce footer with 'Salesforce Offline', '14 Sales', 'LightningSales', 'Manage your sales process with accounts, leads, opportunities, and more', '14/07/2023, 10:47 am', 'Lightning', and a dropdown menu.

Conclusion:

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

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

The screenshot shows the Salesforce Lightning interface for the 'colleges' object. The top navigation bar includes 'My college', 'colleges', 'CDepartments', 'student', and 'Content'. A search bar and various icons are also present. The main content area is titled 'Recently Viewed' and displays a message: 'You haven't viewed any colleges recently. Try switching list views.' There is a single column header 'college Name' with a checkbox. The status bar at the bottom indicates '0 items • Updated a few seconds ago'.

The screenshot shows the Salesforce Lightning interface for creating a new college record. The top navigation bar is identical to the previous screen. The main content area is titled 'New college' and contains a form with the following fields:

Information	
*college Name	kiot
phone	9087116402
Email	kiot@ac.in
Location	
Latitude	90
Longitude	80

The 'Owner' field is set to 'krishna s'. A note at the top right of the form says '*= Required Information'. At the bottom, there are 'Cancel', 'Save & New', and 'Save' buttons. The status bar at the bottom indicates '0 items • Updated a minute ago'.

The screenshot shows a web-based application interface for managing departments. At the top, there is a navigation bar with links for 'My college', 'colleges', 'CDepartments', 'student', and 'Content'. A search bar is located at the top right. Below the navigation, a header bar displays 'CDepartments' and 'Recently Viewed'. A message indicates '1 item • Updated a few seconds ago'. A table lists one item: 'cse'. The table has columns for 'Department Name' and 'Actions'. On the far right of the table, there are icons for 'New', 'Import', and other list management functions.

© History

The screenshot shows a 'New CDepartment' form. The title bar says 'New CDepartment'. The form is divided into sections: 'Information' and 'About'. The 'Information' section contains fields for 'Department Name' (set to 'information technology'), 'college' (set to 'kiot'), 'email' (set to 'it@gmail.com'), 'phone' (set to '897577568'), 'hod name' (set to 'arul'), and an 'about' text area which is empty. A note at the top right of the form indicates that a red asterisk (*) means 'Required Information'. At the bottom of the form are three buttons: 'Cancel', 'Save & New', and 'Save' (which is highlighted in blue).

My college colleges CDepartments student Content

CDepartment information technology

New Contact Edit New Opportunity

Related Details

Department Name
information technology

college
kiot

email
it@gmail.com

phone
897577568

hod name
arul

about

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

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

History

My college colleges CDepartments 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 CDepartments student Content

CDepartments Recently Viewed

1 item • Updated a few seconds ago

Department Name

cse

New Import

History

Recently Viewed

1 item • Updated a few seconds ago

college Name

kiot

Related Details

college Name
kiot

Total count
2

phone
9087116402

Email
kiot@gmail.com

Location
90.80

Owner
krishna.s.

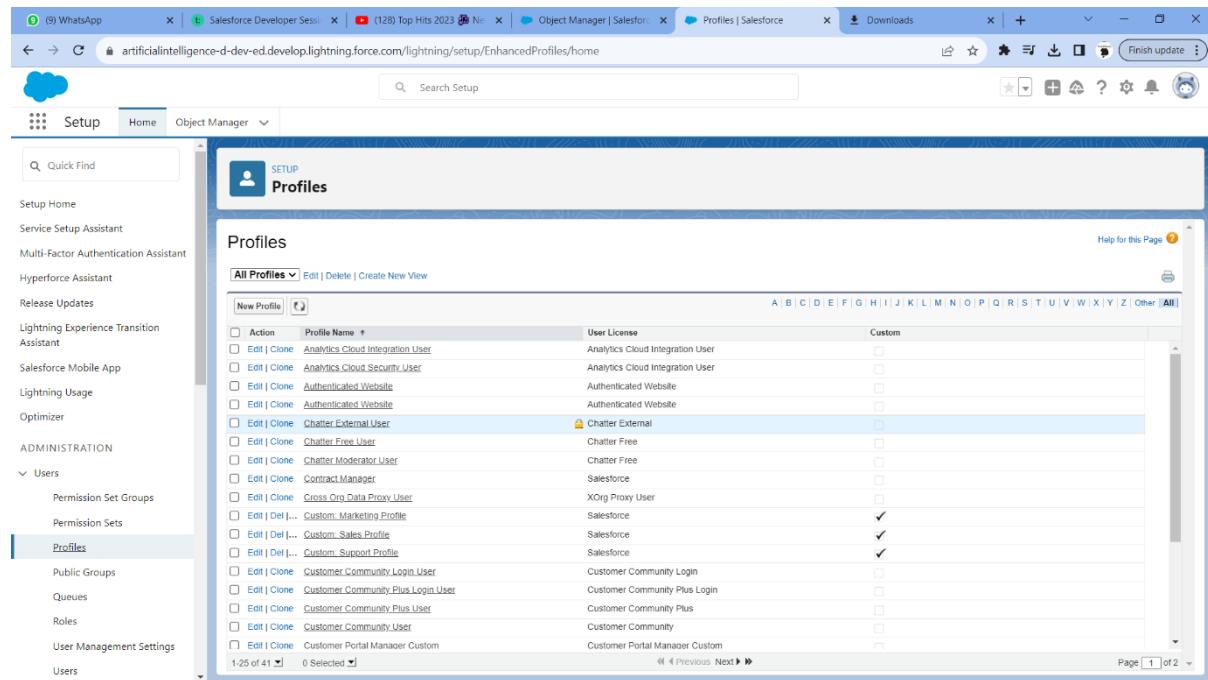
Created By
krishna.s., 01/10/2023, 11:16 am

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

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

Solution:

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



The screenshot shows the Salesforce Setup interface with the 'Profiles' page open. The left sidebar includes links for Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, Administration, Users, and Profiles. The 'Profiles' link under 'Users' is highlighted. The main content area displays a table of profiles with columns for Action, Profile Name, User License, and Custom status. The 'Chatter External' profile is selected, indicated by a blue highlight. Other profiles listed include Analytics Cloud Integration User, Analytics Cloud Security User, Authenticated Website, Chatter Free, Chatter Free User, Chatter Moderator User, Contract Manager, XOrg Proxy User, Salesforce, 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 table has a header row with letters A through Z and a 'Custom' column. Navigation buttons at the bottom indicate 1-25 of 41 profiles and 0 Selected.

Screenshot of the Salesforce Setup interface showing the Profiles page.

The left sidebar shows the following navigation:

- 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

The main content area displays the "Profiles" page with the following details:

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"/>

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

1 of 7 | 0 Selected | Previous | Next | Page 1 of 1

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from. (Required)

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

Save | Cancel

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

Profiles

Clone Profile

You must select an existing profile to clone from.

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

Save Cancel

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

Profiles

Manager

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

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

Profile Detail	
Name	Manager
User License	Salesforce Platform
Description	
Created By	GOPAL_S_01/10/2023, 7:09 pm
Modified By	GOPAL_S_01/10/2023, 7:09 pm
Page Layouts	
Standard Object Layouts	
Global	Global Layout [View Assignment]
Email Application	Not Assigned [View Assignment]
Home Page Layout	Home Page Default [View Assignment]
Account	Account Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]
Appointment Invitation	Appointment Invitation Layout [View Assignment]
Asset	Asset Layout [View Assignment]
Operating Hours	Operating Hours Layout [View Assignment]
Order	Order Layout [View Assignment]
Order Product	Order Product Layout [View Assignment]
Payment	Payment Layout [View Assignment]
Payment Authorization	Payment Authorization Layout [View Assignment]
Payment Authorization Adjustment	Payment Authorization Adjustment Layout [View Assignment]
Payment Gateway	Payment Gateway Layout [View Assignment]

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

- Header:** The URL is artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j000000WQBz%2Fe%3Fr?url%3D%252F00e5j0.... The title bar includes tabs for WhatsApp, Salesforce Developer Session, YouTube, Object Manager, Profiles, and Downloads.
- Left Sidebar:** The sidebar is titled "Setup" and contains the following sections:
 - Quick Find
 - Setup Home
 - Service Setup Assistant
 - Multi-Factor Authentication Assistant
 - Hyperforce Assistant
 - Release Updates
 - Lightning Experience Transition Assistant
 - Salesforce Mobile App
 - Lightning Usage
 - Optimizer- Administration:** A collapsed section under "ADMINISTRATION" includes "Users" (with "Permission Set Groups" and "Permission Sets" sub-options), "Profiles" (which is currently selected and highlighted in blue), "Public Groups", "Queues", "Roles", "User Management Settings", and "Users".

- Central Content:** The main area is titled "SETUP Profiles Manager". It displays the "Profile Edit" screen for the "Manager" profile.
- Profile Edit Form:** Fields include Name (Manager), User License (Salesforce Platform), Description (empty), and a "Custom Profile" checkbox which is checked and has a checkmark icon.
- Custom App Settings:** A table showing visibility and default status for various apps:

App	Visible	Default
Analytics Studio (standard_Insights)	<input type="checkbox"/>	<input checked="" type="radio"/>
App Launcher (standard_AppLauncher)	<input type="checkbox"/>	<input checked="" type="radio"/>
kiot (kiot)	<input checked="" type="checkbox"/>	<input type="radio"/>
Platform (standard_Platform)	<input type="checkbox"/>	<input checked="" type="radio"/>
WDC (standard_Work)	<input type="checkbox"/>	<input checked="" type="radio"/>
- Service Provider Access:** A section with "Tab Settings" containing a checkbox for "Overwrite users' personal tab customizations".
- Standard Tab Settings:** A table for managing tabs:

Tab	Home	Default On
Accounts	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>
Alert Settings	<input type="checkbox"/>	<input checked="" type="radio"/>
- Buttons:** Save, Save & New, Cancel.

The screenshot shows the Salesforce Setup interface under the Profiles section. The main content area displays a grid of checkboxes for various communication subscription types and their associated settings like Consent and Timings. Below this is a section for Custom Object Permissions, showing checkboxes for Read, Create, Edit, Delete, View All, and Modify All for specific objects like Bank and customers. The bottom sections include Session Settings (Session Times Out After: 2 hours of inactivity) and 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=%2F00e5j00000WQBz%2Fe%3FretURL%3D%252F00e5j0... | Profiles | Salesforce | Downloads | Finish update

Profiles

Custom Object Permissions

	Basic Access	Create	Edit	Delete	Data Administration
Contact Point Addresses	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contact Point Consents	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contact Point Emails	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Sellers	<input checked="" type="checkbox"/>				
Streaming Channels	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
User External Credentials	<input type="checkbox"/>				

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Profiles

Custom Object Permissions

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

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Profiles

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

Profiles

Custom Object Permissions

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

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Profiles

Custom Object Permissions

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

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Profiles

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

Profiles

Custom Object Permissions

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

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

User passwords expire in:	90 days
Enforce password history:	3 passwords remembered
Minimum password length:	8
Password complexity requirement:	Must include alpha and numeric characters
Password question requirement:	Cannot contain password
Maximum invalid login attempts:	10
Lockout effective period:	15 minutes
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 | (128) Top Hits 2023 | Object Manager | Salesforce | Users | Salesforce | Downloads | Finish update

Users

All Users

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

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

View: All Users | Edit | Create | New | View

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit Login	Adriana_Diva	dadan	test_diva_nas_4e0b0f0wtk_ts2grgktxpx_3nj0fof0yzewns_h43tkzw6meia@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	LMS User
<input type="checkbox"/> Edit	Chatter Export	Chatter	chatty_000d5000000crskkeap_lc0bhymn0is@chatter.salesforce.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit Login	Ellington_Amelia	aelli	amelia.ellington.1.46kxxc0poohh_6cyedcuodwh_hnbdlwmvvhtho_wguctor1dalv@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/> Edit	S_GOPAN	GS	kot120@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	User_Integration	integ	integration@000d500000crskkeab.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightssecurity@000d500000crskkeab.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

Aliases: [] 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
PLATFORM TOOLS
Apps

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: sowmya Role: <None Specified>

Last Name: bala User License: Salesforce Platform

Aliases: sba@ka Profile: Manager

Email: 2k20cse179@kiot.ac.in Active:

Username: 2k21t@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
PLATFORM TOOLS
Apps

The screenshot shows the Salesforce Setup interface for managing users. On the left, a sidebar lists various setup categories like Hyperforce Assistant, Lightning Experience Transition Assistant, and Administration. Under Administration, the 'Users' section is selected, showing sub-options for Data, Email, and Apps. The main content area displays the 'User Detail' for a user named 'SOWMYA bala'. The user's name is listed as 'sowmya bala' with an alias 'stala'. The email address is '2k21it@kiot.ac.in'. The user has a nickname 'User16961677128256452616' and a title 'worker'. The company is 'kiot bank'. The user is assigned to the 'Manager' profile, which is checked as active. Other profiles listed include Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Mobile Push Registrations (checked), Data.com User Type (checked), Accessibility Mode (Classic Only) (unchecked), Debug Mode (unchecked), High-Contrast Palette on Charts (unchecked), Load Lightning Pages While Scrolling (checked), and Salesforce CRM Content User (checked). The user's time zone is '(GMT+05:30) India Standard Time (Asia/Kolkata)', locale is 'English (India)', and language is 'English'. The user is a Delegated Approver for Manager. The 'Receive Approval Request Emails' setting is 'Only if I am an approver'. Federation ID, App Registration: One-Time Password Authenticator, and App Registration: Salesforce Authenticator fields are also present.

The screenshot shows a Gmail inbox with 5,318 messages. A new message from 'support@salesforce.com' is highlighted, addressed to the user. The subject of the email is 'Welcome to Salesforce!'. The body of the email contains a blue button labeled 'Verify Account' and a URL: <https://artificialintelligence-d-dev-ed.develop.my.salesforce.com>. Below the URL, it says 'To easily log in later, save this URL.' and provides the username '2k21it@kiot.ac.in'. The email concludes with 'Again, welcome to Salesforce!' and a copyright notice at the bottom: '© Copyright 2000-2018 salesforce.com, inc. All rights reserved. Various trademarks held by their respective owners.'

(9) WhatsApp x | (1) Salesforce Dev x | (128) Top Hit x | Object Manag 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

Incognito Finish update

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

AI Day

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Recently Viewed | Bank | Salesfo... x +

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

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&navigationLocation=LIST_VIEW&uid=16...

kiot Bank customers Home

Search...

Recently Viewed ▾

0 items • Updated a few seconds ago

Bank Name

New Bank

* = Required Information

Information
<p>Bank Name: boi</p> <p>Owner: sowmiya bala</p> <p>phoneno: 0897754534</p>

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... Incognito Finish update

kiot Bank customers Home

Recently Viewed ▾

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

customer Name ↓

New customer

* = Required Information

Information

* customer Name: madhu

* Bank: boi

Cancel Save & New Save

List View

madhu | customer | Salesforce

https://artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/r/customer__c/a025|00000f0YfaAAM/view Incognito Finish update

kiot Bank customers Home

customer madhu

✓ customer **madhu** was created.

New Contact Edit Delete

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

List View

Salesforce Developer Session 2 | (128) Top Hits 2023 | New Po... | 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

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

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

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

Save Cancel

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

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

Profile salesmanage

Profile Detail Name: salesmanage User License: Salesforce Platform Description: Created By: GOPALS_01/10/2023, 7:19 pm Modified By: GOPALS_01/10/2023, 7:19 pm

Page Layouts Standard Object Layouts Global Email Application Home Page Layout Account Alternative Payment Method Appointment Invitation Asset Global Layout [View Assignment] Not Assigned [View Assignment] Home Page Default [View Assignment] Account Layout [View Assignment] Alternative Payment Method Layout [View Assignment] Appointment Invitation Layout [View Assignment] Asset Layout [View Assignment]

Operating Hours Order Order Product Payment Payment Authorization Payment Authorization Adjustment Payment Gateway

Operating Hours Layout [View Assignment] Order Layout [View Assignment] Order Product Layout [View Assignment] Payment Layout [View Assignment] Payment Authorization Layout [View Assignment] Payment Authorization Adjustment Layout [View Assignment] Payment Gateway Layout [View Assignment]

Help for this Page

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

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

Profile Edit salesmanage

Profile Edit Name: salesmanage User License: Salesforce Platform Description:

Custom App Settings

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

Service Provider Access

Tab Settings

Overwrite users' personal tab customizations

Standard Tab Settings Home Default On Learning Default On

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

Setup Home Service Setup Assistant Multi-Factor Authentication Assistant Hyperforce Assistant Release Updates Lightning Experience Transition Assistant Salesforce Mobile App Lightning Usage Optimizer ADMINISTRATION ▾ Users Permission Set Groups 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	View All	Modify All			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"/>
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"/>
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 profile

Setup Home Service Setup Assistant Multi-Factor Authentication Assistant Hyperforce Assistant Release Updates Lightning Experience Transition Assistant Salesforce Mobile App Lightning Usage Optimizer ADMINISTRATION ▾ Users Permission Set Groups 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	View All	Modify All			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 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"/>
Enhancement Requests	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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 Page | Users | Salesforce | Welcome to Salesforce: Verify your...

Setup Home Object Manager

Search Setup

User Management Settings

New User

User Edit Save Save & New Cancel

General Information

First Name: Last Name: Role: <None Specified>

Aliases: User License: Salesforce Integration

Email: Profile: Salesforce API Only System Integrations

Username: Active:

Nickname: Marketing User:

Title: Offline User:

Company: Knowledge User:

Department: Flow User:

Division: Service Cloud User:

Data.com User Type: Site.com Contributor User:

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

Accessibility Mode (Classic Only):

High-Contrast Palette on Charts:

Load Lightning Pages While Scrolling:

Debug Mode:

Help for this Page

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

Setup Home Object Manager

Search Setup

User Management Settings

New User

User Edit Save Save & New Cancel

General Information

First Name: madhu Last Name: Role: <None Specified>

Aliases: mb User License: Sales Platform

Email: 2k20cse179@kiot.ac.in Profile: salesmanage

Username: 2k20cse179@kiot.ac.in Active:

Nickname: User169616842428854192 Marketing User:

Title: worker Offline User:

Company: kiot bank Knowledge User:

Department: Sales Flow User:

Division: Service Cloud User:

Data.com User Type: Site.com Contributor User:

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

Accessibility Mode (Classic Only):

High-Contrast Palette on Charts:

Load Lightning Pages While Scrolling:

Debug Mode:

Help for this Page

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' tab selected under 'User'. A new user record is being created. The 'Mailing Address' section contains empty input fields for Street, City, Zip/Postal Code, State/Province, and County. The 'Single Sign On Information' section has an empty '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', both currently empty. A dropdown menu for 'Receive Approval Request Emails' is set to 'Only if I am an approver'. A checked checkbox indicates 'Generate new password and notify user immediately'. 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 shows the same Salesforce Setup interface as the first one, but with specific address details filled in for the new user. In the 'Mailing Address' section, the 'Street' field contains '4/164, anyampalayam, uthamasalapuram...', the 'City' field contains 'SALEM', the 'Zip/Postal Code' field contains '636308', the 'State/Province' field contains 'TAMIL NADU', and the 'Country' field contains 'India'. The rest of the page remains identical to the first screenshot, including the empty approver fields and the checked password generation option.

Screenshot showing the Salesforce Developer Session 2 interface and a Gmail inbox.

Salesforce Developer Session 2:

- Tab: WhatsApp
- Tab: Salesforce Developer Session 2
- Tab: (128) Top Hits 2023
- Tab: New Po...
- Tab: Users | Salesforce
- Tab: Welcome to Salesforce: Verify yo...

The main window displays the Salesforce Setup interface under the "Users" section. A user named "madhu b" is selected. The "User Detail" tab is active, showing the following details:

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

Gmail:

- Tab: WhatsApp
- Tab: Salesforce Developer Session 2
- Tab: (128) Top Hits 2023
- Tab: New Po...
- Tab: Users | Salesforce
- Tab: Welcome to Salesforce: Verify yo...

The Gmail inbox shows an email from Salesforce with the subject "Welcome to Salesforce!". The email content is:

Welcome to Salesforce!

Click below to verify your account.

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

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

Again, welcome to Salesforce!

© Copyright 2000-2018 salesforce.com, inc. All rights reserved. Various trademarks held by their respective owners.
Salesforce.com, inc. The Landmark at One Market, Suite 300, San Francisco, CA, 94105, United States

Buttons: 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

New

Bank Name

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

List View

Recently Viewed | customers | [+ Incognito \(3\)](#) | [Finish update](#)

Recently Viewed

0 items • Updated a few seconds ago

customer Name

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

List View

(9) WhatsApp | Salesforce Developer Session | (128) Top Hits 2023 | Permission Sets | Salesfor... | Welcome to Salesforce! | Reset Password | Salesfor... | +

Setup Home Object Manager

Search Setup

Permission Sets

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

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

All Permission Sets | Edit | Delete | Create New View

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

1-25 of 29 | 0 Selected | < 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 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:

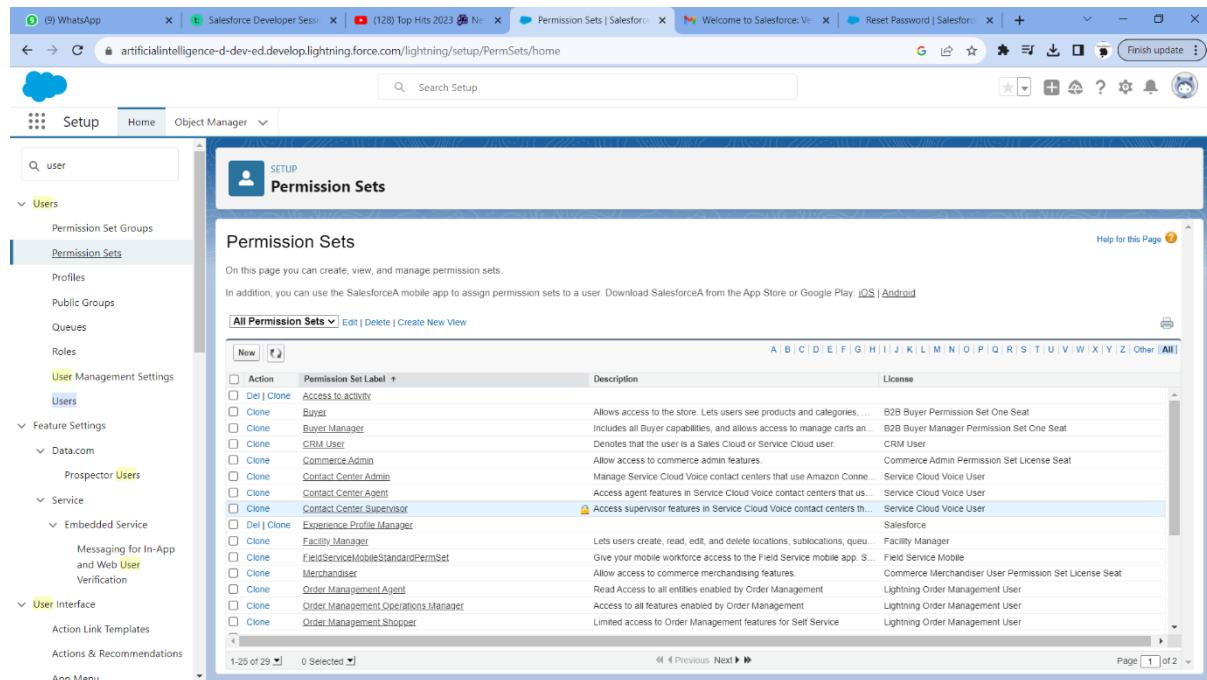
- Ensure that the Account records are owned by the respective users, with User A owning their records and User B owning their records.

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 following details:

- Left Navigation Bar:** Shows the navigation path: Home > Users > Permission Sets.
- Header:** The title is "Permission Sets".
- Table:** A list of permission sets with columns: Action, Permission Set Label, Description, and License.
- Table Data (Partial View):**

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

Salesforce Developer Session | artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2Fudd%2FPermissionSet%2FnewPermissionSet.apexp

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

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User Interface

Action Link Templates

Actions & Recommendations

App Menu

Permission Sets

Create

Enter permission set information

Label:

API Name:

Description:

Session Activation Required:

Select the type of users who will use this permission set

Who will use this permission set?

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

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

License: --None--

Save Cancel

Help for this Page

Salesforce Developer Session | artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2Fudd%2FPermissionSet%2FnewPermissionSet.apexp

Setup Home Object Manager

Search Setup

User

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App Menu

Permission Sets

Create

Enter permission set information

Label: salesmanager

API Name: salesmanager

Description:

Session Activation Required:

Select the type of users who will use this permission set

Who will use this permission set?

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

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

License: --None--

Save Cancel

Help for this Page

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

Permission Set Overview:

Setting	Description	Value
API Name	salesmanager	
Namespace Prefix	GOPALS_	
Created By	GOPALS_	
Last Modified By	GOPALS_	
Session Activation Required	unchecked	

Apps:

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

Object Settings:

Object Name	Object Permissions	Total Fields	Tab Settings
Accounts	No Access	40	--
AI Insights 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 Invitees	--	4	--
Appointment Schedule Aggregates	No Access	--	--
Appointment Schedule Logs	No Access	--	--
Appointment Topic Time Slots	No Access	6	--
Asset Actions	No Access	30	--
Asset Action Sources	No Access	18	--
Asset Relationships	--	10	--
Assets	No Access	42	--
Asset State Periods	No Access	11	--

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

Setup Home Object Manager

Search Setup

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Permission Set

salesmanager

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

Permission Set Overview > Object Settings Bank

Bank

Tab Settings

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

Object Permissions

Permission Name	Enabled
Read	<input type="checkbox"/>
Create	<input type="checkbox"/>
Edit	<input checked="" 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

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

Setup Home Object Manager

Search Setup

User Management Settings

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App Menu

Permission Set

salesmanager

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

Permission Set Overview > Object Settings Bank

Bank

Tab Settings

Save | Cancel

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

Object Permissions

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

Field Permissions

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

Search this list...

Full Name	All...	Username	Role	Action	Profile
Amelia Ellington	aelli	amelia.ellington.146kxcp9odih.d6cwpdcuo4wh.hnbdwmvwhhq.wguctpr1dalv@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Force.com - App Subscription User
Chatter Expert	Chatter	chatty.00d5j00000bcskkeab.lo0bfwmpqike@chatter.salesforce.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Chatter Free User
Diya Adanna	dadian	test_diya_pas.4w8bjybi9wik.tszrgsbbkpxp.3gi8ofovzwns.h43bkzw6mea@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	UIMS User
GOPAL S	GS	kiot520@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	System Administrator
Integration User	integ	integration@00d5j00000bcskkeab.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Integration User
madhu b	mb	2k20csit@kiot.ac.in	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	salesmanager
Security User	sec	insightssecurity@00d5j00000bcskkeab.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Security User
sowmiya bala	sbala	2k21it@kiot.ac.in	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Manager

Cancel Next

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

Setup Home Object Manager

Select an Expiration Option For Assigned Users

No expiration date (selected)

Specify the expiration date

Time Zone: Select a time zone...

Selected Users

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

Cancel Back Assign

PERMISSION SET 'SALESMANA' 1 assignments were successful.

Assignment Summary

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

Done

Search Setup

user

Users

Permission Set Groups

Permission Sets

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App Menu

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:

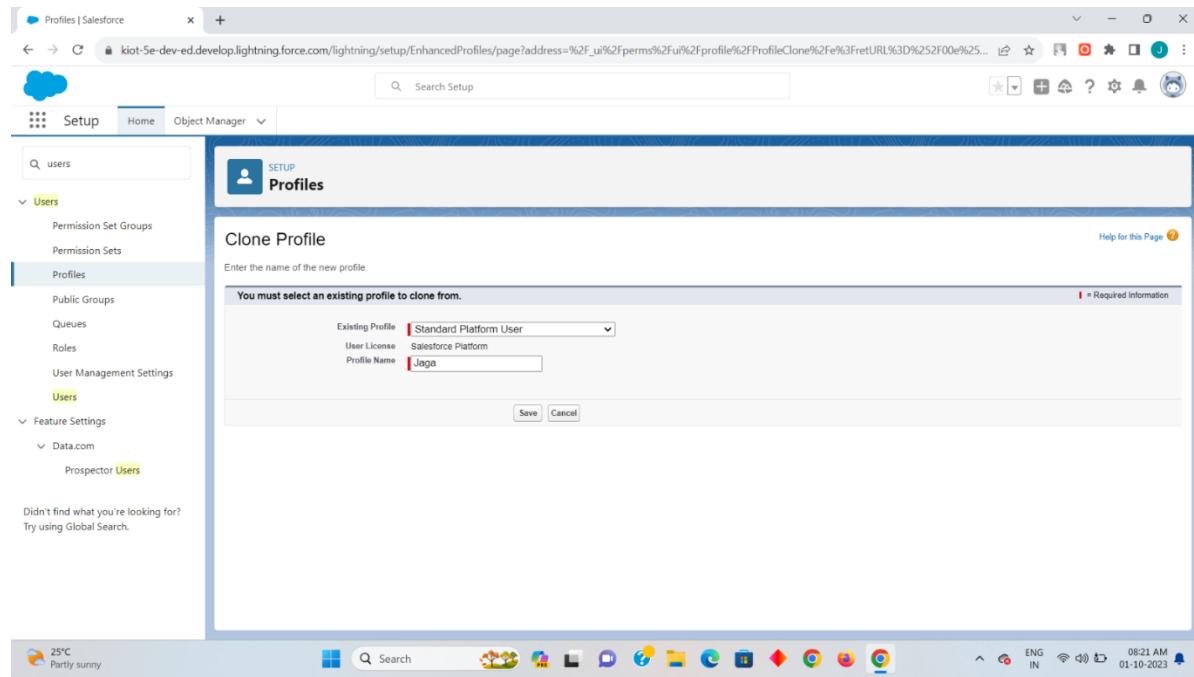
- Page Header:** Profiles | Salesforce
- Search Bar:** Search Setup
- Left Navigation:** Setup, Home, Object Manager. Under "Users", "Profiles" is selected.
- Section Header:** Profiles
- Sub-Header:** All Profiles
- Table:** A list of profiles with columns: Action, Profile Name, User License, and Custom. Some profiles have checkboxes next to them.

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

- Page Footer:** 25°C Partly sunny, Search bar, various icons, ENG IN, 08:20 AM, 01-10-2023

Step 2:

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



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

Step 3:

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

The screenshot shows the Salesforce Setup Profiles page for the 'Jaga' profile. The left sidebar is expanded, showing sections like 'Permission Set Groups', 'Permission Sets', 'Profiles' (which is selected), 'Public Groups', 'Queues', 'Roles', 'User Management Settings', 'Users' (selected), 'Feature Settings', 'Data.com', and 'Prospector Users'. The main content area displays the 'Profile Jaga' details. It includes fields for Name (Jaga), User License (Salesforce Platform), Description, Created by (Jagadesh S.), and Modified by (Jagadesh S.). Below this is the 'Page Layouts' section, which lists various standard object layouts and their global operating hours. The bottom of the page has tabs for 'Edit', 'Close', 'Delete', and 'View Users'.

The screenshot shows the same Salesforce Setup Profiles page, but the 'Custom Object Permissions' section is now visible. This section contains two tables: one for 'Basic Access' and one for 'Data Administration'. Under 'Basic Access', there are checkboxes for Read, Create, Edit, Delete, View All, and Modify All for 'Providers' and 'Resources'. Under 'Data Administration', there are checkboxes for View All and Modify All for 'Providers' and 'Resources'. Below these tables is the 'Session Settings' section, which includes fields for 'Session Times Out After' (set to 2 hours of inactivity), 'Session Security Level Required at Login' (set to None), and several checkboxes for login policies like 'Separate Experience Cloud site and Salesforce login authentication for employees', 'Relax login IP restrictions', and 'Skip employee device activation during Experience Cloud site login'.

Profiles | Salesforce

Search Setup

Setup Home Object Manager

Users

Profile Edit Jaga

Profile Edit Jaga

Set the permissions and page layouts for this profile.

Profile Edit Jaga

Name: Jaga

User License: Salesforce Platform

Description:

Custom Profile:

Custom App Settings

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

Service Provider Access

Tab Settings

Overwrite users' personal tab customizations

25°C Partly sunny

Search

ENG IN 08:21 AM 01-10-2023

Profiles | Salesforce

Search Setup

Setup Home Object Manager

Users

Profile Edit Jaga

Profile Edit Jaga

Set the permissions and page layouts for this profile.

Profile Edit Jaga

Name: Jaga

User License: Salesforce Platform

Description:

Custom Profile:

Custom App Settings

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

Service Provider Access

Tab Settings

Overwrite users' personal tab customizations

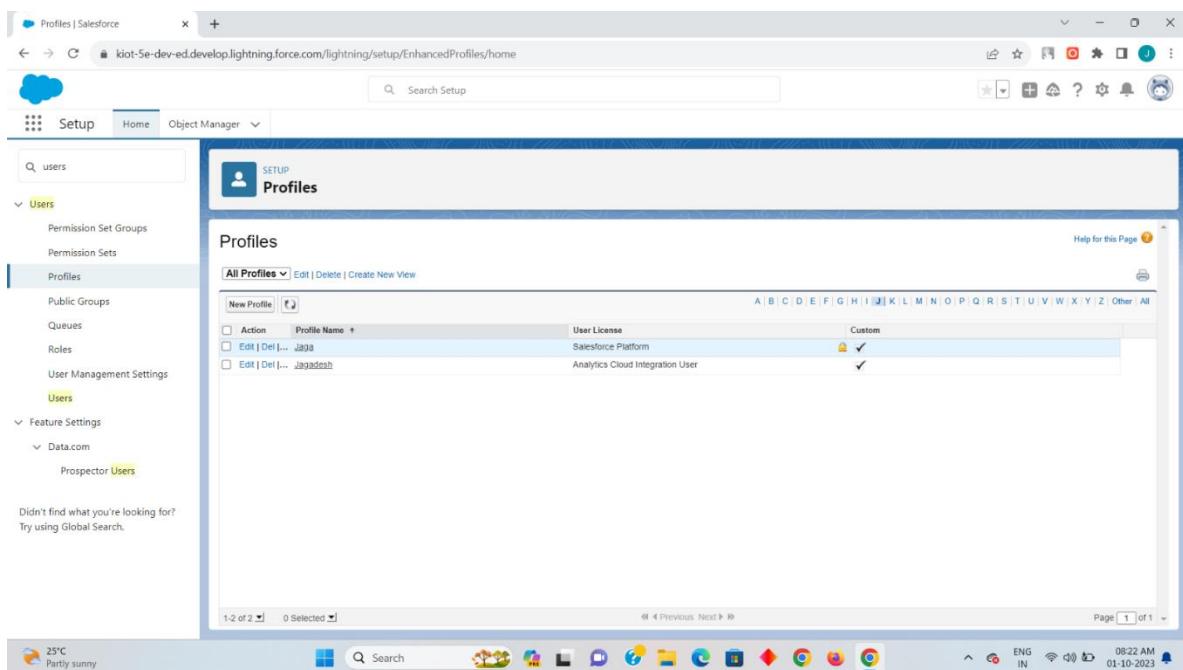
25°C Partly sunny

Search

ENG IN 08:21 AM 01-10-2023

Step 4

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



The screenshot shows the Salesforce Setup interface for managing Profiles. The left sidebar is collapsed, and the main content area displays the 'Profiles' section under the 'SETUP' tab. A search bar at the top right contains the text 'Search Setup'. The main table lists profiles, with one row selected for the 'jaga' profile. The table columns include 'Action', 'Profile Name', 'User License', and 'Custom'. The 'jaga' profile is listed under the 'Salesforce Platform' license and is marked as 'Custom'. The status bar at the bottom indicates the weather as '25°C Partly sunny' and the system time as '08:22 AM 01-10-2022'.

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit Del ...	jaga	Salesforce Platform	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Jagadeesh	Analytics Cloud Integration User	<input checked="" type="checkbox"/>

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.

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

- Header:** The URL is `kiot-5e-dev-ed.lightning.force.com/lightning/setup/ManageUsers/home`. The page title is "Users | Salesforce".
- Left Navigation Bar:** Includes links for Setup, Home, Object Manager, and a search bar for "users". A sidebar menu is open for "Users", showing options like Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and Feature Settings.
- Main Content Area:** The "All Users" page is displayed. It includes:
 - A header section with a "SETUP" button and a "Users" icon.
 - A sub-header "All Users" with a "Help for this Page" link.
 - A message: "On this page you can create, view, and manage users." and "In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: iOS | Android".
 - A "View:" dropdown set to "All Users" with options "Edit" and "Create New View".
 - A toolbar with buttons for "New User", "Reset Password(s)", and "Add Multiple Users".
 - A table listing users with columns: Action, Full Name, Alias, Username, Role, Active, and Profile. The table contains the following data:

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter_Expired	Chatter	chatty_00d5f00000c8joseaf_6z@pkrrkd4i@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	Grey_Jane	jgrey	jane_gray.ygnmrm0aim.cz7dk0npt3@gmail.com		<input checked="" type="checkbox"/>	Customer Community User
<input type="checkbox"/> Edit	S.Jagad	JS	jaga098@gmail.com	CEO	<input type="checkbox"/>	Standard Platform User
<input type="checkbox"/> Edit	S.Jagadesh	JS	wow@ymail.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@00d5f00000c8joseaf.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Secuthr	sec	insightssecurity@00d5f00000c8joseaf.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User
 - A toolbar at the bottom with buttons for "New User", "Reset Password(s)", and "Add Multiple Users".
 - Page navigation icons at the bottom.

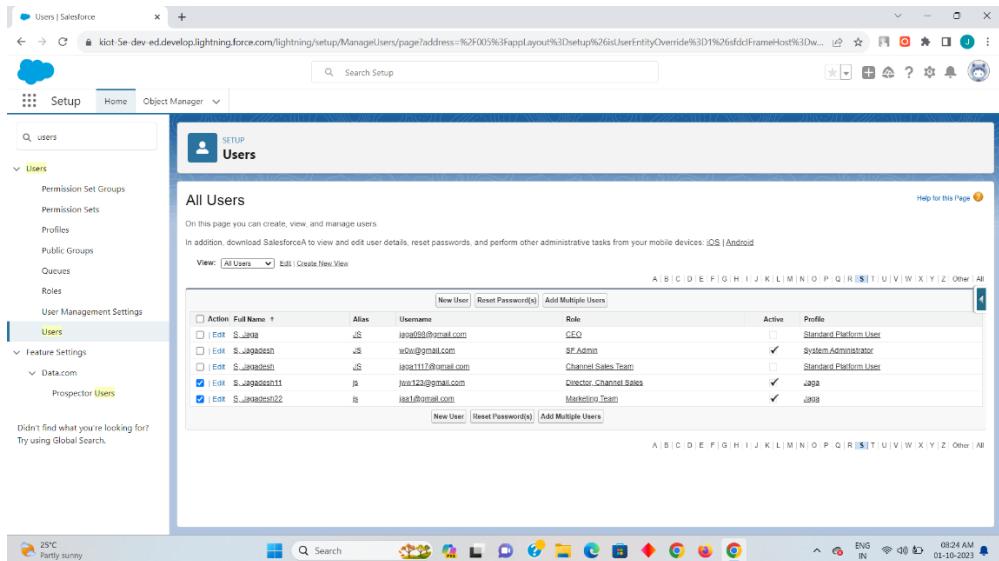
The screenshot shows the Salesforce Setup interface with the following details:

- Page Header:** Users | Salesforce
- Search Bar:** Search Setup
- Page Title:** Users
- Section:** New User
- User Edit Form:**
 - General Information:** Fields include First Name (Jagadesh11), Last Name (S), Alias (jb), Email (jwv123@gmail.com), Username (jwv123@gmail.com), Nickname (User169612075144962502), Title, Company, Department, and Division.
 - Role:** Director, Channel Sales
 - User License:** Salesforce Platform
 - Profile:** None
 - Active:** None
 - Marketing User:** Jagja (Standard Platform User)
 - Office User:** None
 - Knowledge User:** None
 - Flow User:** None
 - Service Cloud User:** None
 - Site.com Contributor User:** None
 - Site.com Publisher User:** None
 - WDC User:** None
 - Data.com User Type:** None
 - Data.com Monthly Addition Limit:** Default Limit (300)
 - Accessibility Mode:** (Classic Only)
 - High-Contrast Palette on Charts:** None
- Left Sidebar:** Includes sections for Setup, Home, Object Manager, and various system settings like Profiles, Public Groups, and Roles.
- Bottom Navigation:** Shows the current weather (25°C), a search bar, and various application icons.

The screenshot shows the Salesforce Setup interface. The left sidebar is titled "Setup" and includes sections for Home, Object Manager, and various system settings like Permission Set Groups, Profiles, and User Management Settings. A search bar at the top right says "Search Setup". The main content area is titled "New User" under the "Users" section. The "General Information" tab is selected. The form fields include:

- User Name: jaa1
- First Name: Jagadesh22
- Last Name: S
- Alt ID: JS
- Email: jaa1@gmail.com
- Username: jaa1@gmail.com
- Nickname: User169612879963618745
- Title:
- Company:
- Department:
- Division:
- Role: Marketing Team
- User License: Salesforce Platform
- Profile: **Marketing User** (highlighted)
- Active:
- Language: English
- Time Zone: Asia/Kolkata
- Marketing User: Standard Platform User
- Office User:
- Knowledge User:
- Flow User:
- Service Cloud User:
- Site.com Contributor User:
- Site.com Publisher User:
- WDC User:
- Data.com User Type: **None** (highlighted)
- Data.com Monthly Addition Limit: Default Limit (3000)
- Accessibility Mode (Classic Only):
- High-Contrast Palette on Charts:

At the bottom, there are "Save" and "Save & New" buttons. A message on the left says "Did you find what you're looking for? Try using Global Search."



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

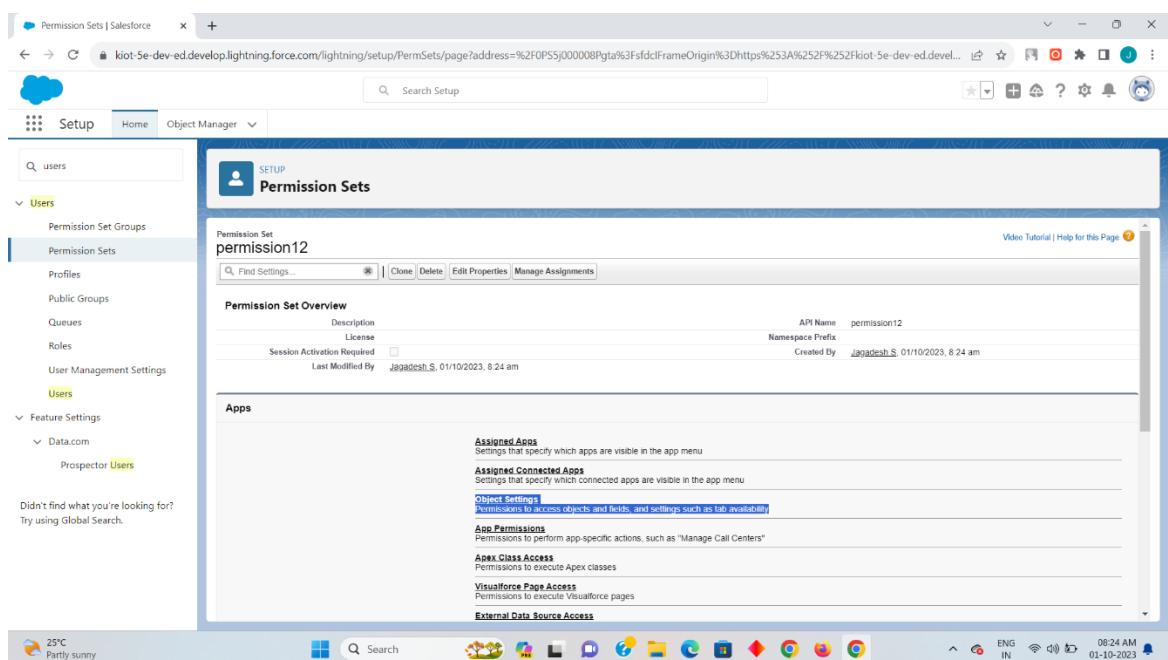
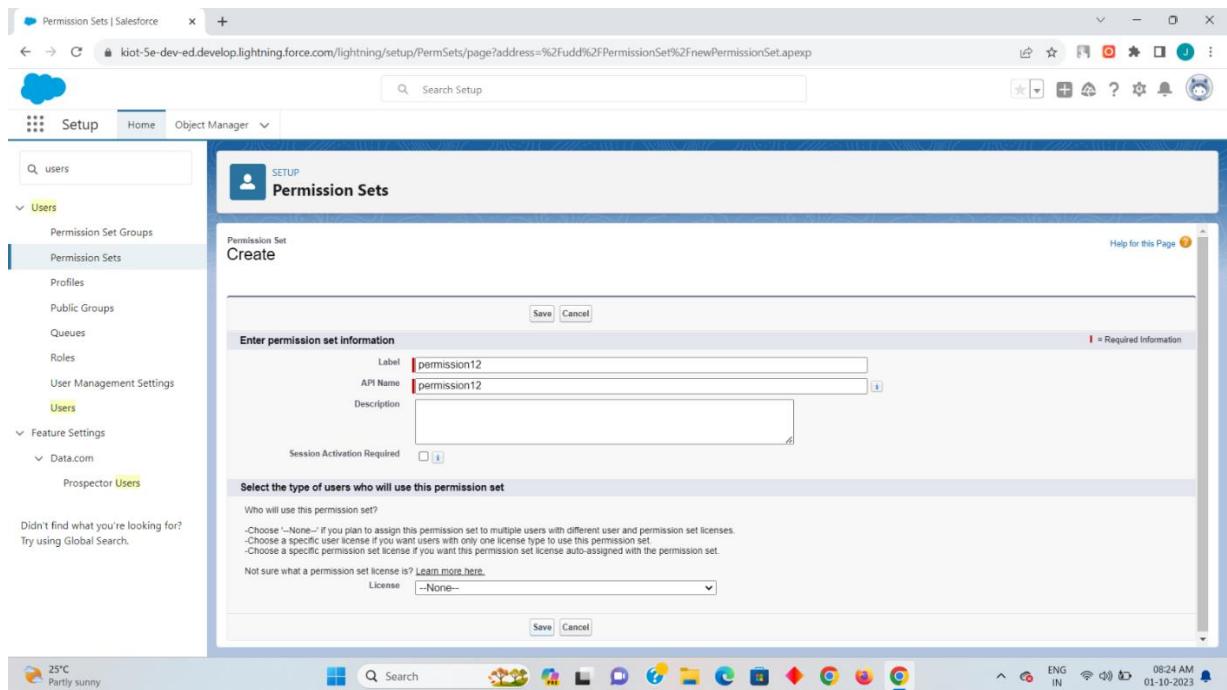
Step 6:

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

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

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 Licensee. The 'Permission Set Label' column lists various roles and system-defined permission sets. The 'Description' column provides a brief overview of each set's functionality. The 'Licensee' column indicates the specific license required for each set. The table is paginated at the bottom, showing page 1 of 2.

Action	Permission Set Label	Description	Licensee
<input type="checkbox"/>	Allow access to the store. Lets users see products and categories,...	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 Come...	Service Cloud Voice User
<input type="checkbox"/>	Clone	Access agent features in Service Cloud Voice contact centers that us...	Service Cloud Voice User
<input type="checkbox"/>	Clone	Access supervisor features in Service Cloud Voice contact centers th...	Service Cloud Voice User
<input type="checkbox"/>	Del/Clone	Experience Profile Manager	Salesforce
<input type="checkbox"/>	Clone	Facility Manager	Facility Manager
<input type="checkbox"/>	Clone	FieldServiceMobileStandardPermSet	Field Service Mobile
<input type="checkbox"/>	Clone	Merchandise	Commerce Merchandiser User: Permission Set License Seat
<input type="checkbox"/>	Clone	Order Management Agent	Lightning Order Management User
<input type="checkbox"/>	Clone	Order Management Operations Manager	Lightning Order Management User



Permission Sets | Salesforce

kiot-5e-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2F0PSSj000008Pgta%3Fs%3DentityPermissions

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

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

25°C Partly sunny

Object Settings

Object Name Object Permissions Total Fields 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	14	--
App Analytics Query Requests	No Access	--	--
Application Usage Assignments	No Access	--	--
Appointment Categories	No Access	3	--
Appointment Invitations	No Access	17	--
Appointment Invitees	--	4	--
Appointment Schedule Aggregates	No Access	--	--
Appointment Schedule Logs	No Access	--	--
Appointment Topic Time Slots	No Access	6	--
Asset Actions	No Access	30	--
Asset Action Sources	No Access	18	--

Video Tutorial | Help for this Page

ENG IN 08:25 AM 01-10-2023

Permission Sets | Salesforce

kiot-5e-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2F0PSSj000008Pgta%3Fs%3DentityPermissions%26o%3DAccount

Setup Home Object Manager

Search Setup

Users

Permission Set Groups

Permission Sets

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

25°C Partly sunny

Accounts

Object Permissions

Permission Name Enabled

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

Field Permissions

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

Video Tutorial | Help for this Page

ENG IN 08:25 AM 01-10-2023

Step 7:

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

Permission Sets | Salesforce

kiot-5e-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2F0P5\$J000008Pgta%3Fo%3DAccount%26%3DEntityPermissions%26sfclFrameOrigin%3D...

Setup Home Object Manager

Search Setup

Users

Permission Set Groups

Permission Sets

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User Management Settings

Users

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Prospector Users

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

25°C Partly sunny

Permission Sets | Salesforce

kiot-5e-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2F0P5\$J000008Pgta%2Fe%3Fs%3DEntityPermissions%26o%3DAccount

Setup Home Object Manager

Search Setup

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

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User Management Settings

Users

Feature Settings

Data.com

Prospector Users

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

25°C Partly sunny

Permission Sets | Salesforce

kiot-5e-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2F0P5\$J000008Pgta/e?i=EntityPermissions&o=Account&iscltp=p1

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

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 screenshots illustrate the process of assigning users to a permission set. In the first screenshot, the 'Current Assignments' page shows no existing assignments. In the second screenshot, the 'Select Users to Assign' page lists four users, with one user's name ('jagad') being searched for in the filter bar. The users listed are:

Full Name	Alias	Username	Role	System Administrator	Standard Platform User	Jaga
Jagad S	JS	wow@gmail.com	SF Admin	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Jagad S	JS	jaga1117@gmail.com	Channel Sales Team	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Jagad11 S	JS	jww123@gmail.com	Director, Channel Sales	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Jagad22 S	JS	jaa1@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

The screenshot shows the 'PERMISSION SET 'PERMISSION12' > MANAGE ASSIGNMENT EXPIRATION' page. The user 'Jagadesh11 S' has been selected for assignment. The interface includes a search bar, a sidebar with navigation links like Setup, Home, Object Manager, and a list of users. The main area displays a table of users with columns for Full Name, Alias, Username, Role, Active status, and Profile.

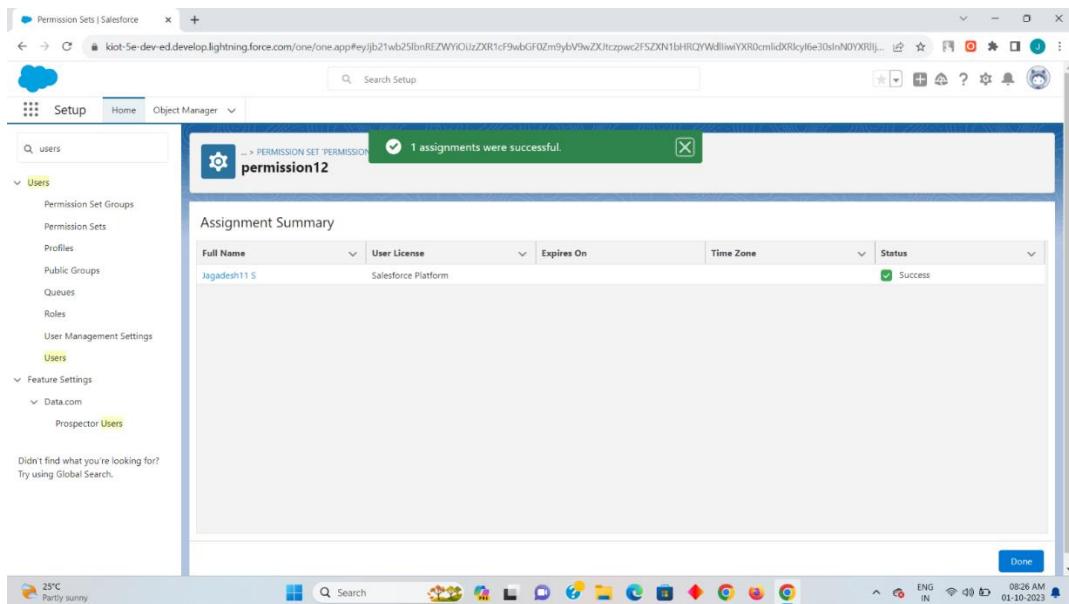
Full Name	Alias	Username	Role	Active	Profile
Jagadesh S	JS	w0w@gmail.com	SF Admin	<input checked="" type="checkbox"/>	System Administrator
Jagadesh S	JS	jega1117@gmail.com	Channel Sales Team	<input type="checkbox"/>	Standard Platform User
Jagadesh11 S	js	jwa123@gmail.com	Director, Channel Sales	<input checked="" type="checkbox"/>	Jaga
Jagadesh22 S	js	jaat1@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Jaga

Click on next.

The screenshot shows the 'PERMISSION SET 'PERMISSION12' > MANAGE ASSIGNMENT EXPIRATION' page. The user 'Jagadesh11 S' has been selected for assignment. The interface includes a search bar, a sidebar with navigation links like Setup, Home, Object Manager, and a list of users. The main area displays a table of users with columns for Full Name, Role, Profile, Active status, User License, and Expires On.

Full Name	Role	Profile	Active	User License	Expires On
Jagadesh11 S	Director, Channel Sales	Jaga	<input checked="" type="checkbox"/>	Salesforce Platform	Never Expires

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**.

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

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

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

Email Template
Thank You Email - Survey

Edit in Builder Edit Clone ▾

Details Related

Information

Email Template Name Thank You Email - Survey	Related Entity Type Survey Result
Description	Folder Public Email Templates
Made in Email Template Builder <input checked="" type="checkbox"/>	

Message Content

Subject Thank You For Completing Our Survey!	Enhanced Letterhead
HTML Value	<p>Hi {{Survey_Result__c.Name__c}},</p> <p>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.</p> <p>Once again, we are extremely grateful for your contributing your valuable time, your honest information, and your thoughtful suggestions.</p> <p>Thanks, Automation Champion</p>

Additional Information

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

Step 3: Create an Email Alert

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

Edit Email Alert

Survey - Thank You Email

Help for this Page 

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

Email Alert Edit

Edit Email Alert

Description: Survey - Thank You Email

Unique Name: Survey_Thank_You_Email 

Object: Survey Result

Email Template: Thank You Email - Survey 

Protected Component:

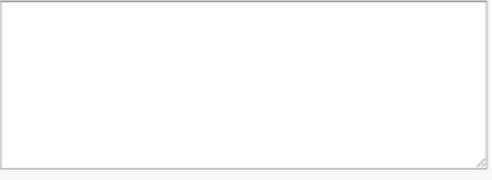
Recipient Type: User  for: 

Recipients

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

Add  Remove 

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

Additional Emails 

From Email Address: Current User's email address 

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

Save **Save & New** **Cancel**

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

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

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

1. Drag-and-drop the **Create Records** element onto the Flow designer.
2. Enter a name in the **Label (Save Response)** field; the **API Name** will auto-populate.
3. For **How Many Records to Create** – select **One**.
4. For **How to Set the Record Fields** – select **Use separate resources, and literal values**.

5. Select the **Survey_Result__c** object from the dropdown list.

6. Set Field Values for the Survey Result

1. Row 1:

1. **Field: Comment__c**

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

2. Click **Add Row**

3. Row 2:

1. **Field: Email__c**

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

4. Click **Add Row**

5. Row 3:

1. **Field: Name__c**

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

{!Name.lastName}

6. Click **Add Row**

7. Row 3:

1. **Field: Rating__c**

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

7. Click **Done**.

Edit Create Records

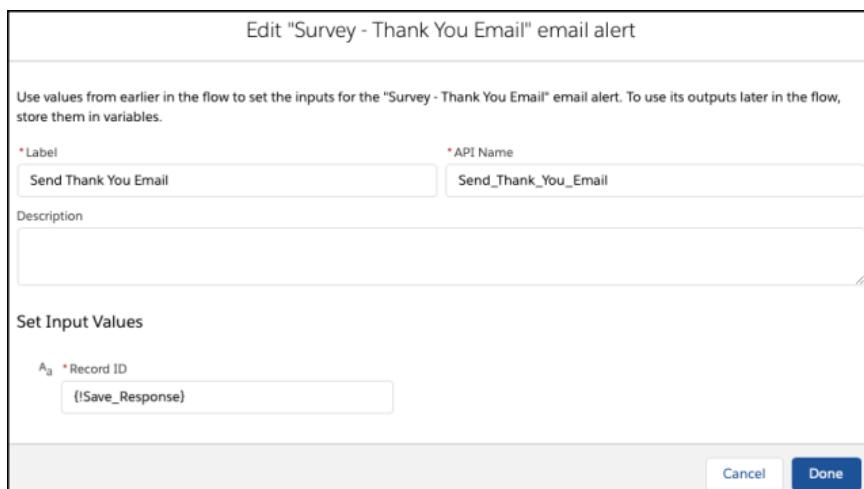
Create Salesforce records using values from the flow.

* Label	* API Name																				
Save Response	Save_Response																				
Description																					
<p>How Many Records to Create</p> <ul style="list-style-type: none"> <input checked="" type="radio"/> One <input type="radio"/> Multiple <p>How to Set the Record Fields</p> <ul style="list-style-type: none"> <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>← A_a Comment X</td> </tr> <tr> <td>Field</td> <td>Value</td> </tr> <tr> <td>Email__c</td> <td>← A_a Email > Value X</td> </tr> <tr> <td>Field</td> <td>Value</td> </tr> <tr> <td>Name__c</td> <td>← {!Name.firstName} {!Name.lastName}</td> </tr> <tr> <td>Field</td> <td>Value</td> </tr> <tr> <td>Rating__c</td> <td>← A_a Rating X</td> </tr> <tr> <td colspan="2"> + Add Field </td> </tr> <tr> <td colspan="2"> <input type="checkbox"/> Manually assign variables </td> </tr> </table>		Field	Value	Comment__c	← A_a Comment X	Field	Value	Email__c	← A_a Email > Value X	Field	Value	Name__c	← {!Name.firstName} {!Name.lastName}	Field	Value	Rating__c	← A_a Rating X	+ Add Field		<input type="checkbox"/> Manually assign variables	
Field	Value																				
Comment__c	← A_a Comment X																				
Field	Value																				
Email__c	← A_a Email > Value X																				
Field	Value																				
Name__c	← {!Name.firstName} {!Name.lastName}																				
Field	Value																				
Rating__c	← A_a Rating X																				
+ Add Field																					
<input type="checkbox"/> Manually assign variables																					
<input type="button" value="Cancel"/> <input type="button" value="Done"/>																					

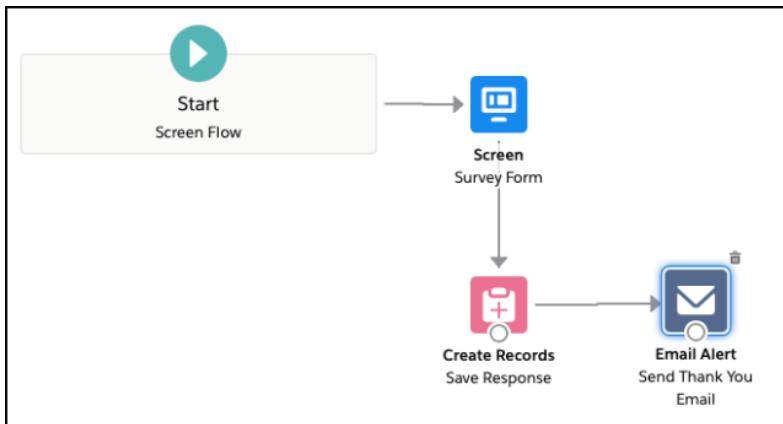
Step 4.3: Salesforce Flow — Call an Acton — Email Alert to Send Out Thank You Email

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

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



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



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

Save as

[A New Version](#) [A New Flow](#)

* Flow Label

* Flow API Name

Description

[Hide Advanced](#)

How to Run the Flow [?](#)

User or System Context—Depends on How Flow is Launched

* Type

* API Version for Running the Flow

Interview Label [?](#)

Insert a resource... [Search](#)

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

Status: [Active](#) Type: Screen Flow Version Number: 2

[Cancel](#) [Save](#)

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

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

1. Click **Setup | Developer Console**
2. Navigate to **File | New | Lightning Application**
3. Enter a **Name (VFPPageToLC)** 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.

File ▾ Edit ▾ Debug ▾ Test ▾ Workspace ▾ Help ▾ < >

VFPageToLC.app *

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

Logs, Tests, and Problems

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**.

Visualforce Page
Survey

Page Edit

Save Quick Save Cancel Where is this used? Component Reference Preview

Help for this Page ?

Page Information

Label: Survey

Name: Survey

Description:

Available for Lightning Experience, Experience Builder sites, and the mobile app

Require CSRF protection on GET requests

Visualforce Markup Version Settings

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

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

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

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

Site Edit

Save Cancel

Site Label	Survey
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 Users	<input checked="" type="checkbox"/>
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

5

*Comment

Awesome Blog

Next

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

