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Assignment no 1

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Year & Dep : 4<sup>th</sup> year & IT  
Batch : 2024  
Zone no : Zone 8

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

Solution:

### Step 1: Create Custom Objects

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

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

- Header:** Includes the Salesforce logo, a search bar labeled "Search Setup", and various navigation icons.
- Breadcrumbs:** "Setup" > "Object Manager" > "New Custom Object".
- Title Bar:** "SETUP" and "New Custom Object".
- Page Content:**
  - New Custom Object**
  - A message bar at the top states: "Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more!](#) [Don't show this message again](#)".
  - Custom Object Definition Edit** section with buttons: "Save", "Save & New", "Cancel". A note says "I = Required Information".
  - Custom Object Information** section:
    - The singular and plural labels are used in tabs, page layouts, and reports.
    - Label:** college (Example: Account)
    - Plural Label:** colleges (Example: Accounts)
    - Starts with vowel sound:**
  - The Object Name is used when referencing the object via the API.
  - Object Name:** college (Example: Account)
  - Description:** (Large text area)
  - Context-Sensitive Help Setting:**
    - Open the standard Salesforce.com Help & Training window
    - Open a window using a Visualforce page
  - Content Name:** (dropdown menu) -None-
  - Enter Record Name Label and Format** section:
    - The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.
    - Record Name:** college Name (Example: Account Name)
    - Data Type:** Text (dropdown menu)
  - Optional Features** section (checkboxes):
    - Allow Reports
    - Allow Activities
    - Track Field History
    - Allow in Chatter Groups
    - Enable Licensing
  - Object Classification** section (checkboxes):
    - Allow Sharing
    - Allow Bulk API Access
    - Allow Streaming API Access
  - Deployment Status** section (radio buttons):
    - In Development
    - Deployed
  - Search Status** section (checkbox):
    - Allow Search
  - Object Creation Options (Available only when custom object is first created)** section (checkboxes):
    - Add Notes and Attachments related list to default page layout
    - Launch New Custom Tab Wizard after saving this custom object
  - Buttons at the bottom: "Save", "Save & New", "Cancel".

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

The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. A message at the top indicates that permissions for the object are disabled for all profiles by default. The 'Custom Object Definition Edit' page is displayed, with the 'Custom Object Information' section active. Fields include 'Label' (department), 'Plural Label' (departments), and 'Object Name' (department). Other sections like 'Enter Record Name Label and Format' and 'Optional Features' are also visible.

## 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.

Cloud icon

Setup Home Object Manager

SETUP > OBJECT MANAGER CDepartment

**Details**

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

Edit Delete

Cloud icon

Setup Home Object Manager

SETUP > OBJECT MANAGER CDepartment

**Details**

**Fields & Relationships**

New Relationship

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

Help for this Page

Previous Next Cancel

Field Label: college

Field Name: college

Description:

Help Text:

Child Relationship Name: CDepartments

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

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

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

Lookup Filter

The top screenshot shows the 'New Relationship' wizard, Step 2 of 6. It asks to select a related object, with 'college' typed into the search bar. The bottom screenshot shows the 'New Custom Field' wizard, Step 1 of 6. It asks to choose a field type, with 'Roll-Up Summary' selected. A detailed description of roll-up summary fields is provided, mentioning they calculate values from related records.

## 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.**

Fields & Relationships				
4 Items, Sorted by Field Label				
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
college	college__c	Master-Detail(college)	college	✓
Created By	CreatedBy	Lookup(User)		
Department Name	Name	Text(80)		✓
Last Modified By	LastModifiedBy	Lookup(User)		

The screenshot shows the Salesforce Setup interface under the 'Tabs' section. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar at the top right contains the text 'Search Setup'. The main content area is titled 'Custom Tabs' and contains several sections:

- Custom Object Tabs**: A table showing three tabs: 'Book1' (Box style), 'Research Proposal' (Square style), and 'student' (Box style). Actions for each tab include 'Edit' and 'Delete'.
- Web Tabs**: A section stating "No Web Tabs have been defined".
- Visualforce Tabs**: A section stating "No Visualforce Tabs have been defined".
- Lightning Component Tabs**: A section stating "No Lightning component tabs have been defined".
- Lightning Page Tabs**: A section stating "No Lightning Page Tabs have been defined".

A help link 'Help for this Page' is located in the top right corner of the content area.

The screenshot shows the Salesforce Setup interface under the 'Object Manager' section, specifically for the 'college' object. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar at the top right contains the text 'college'. The main content area is titled 'New Custom Field' and is currently on 'Step 5. Add to page layouts'. The left sidebar lists various customization options:

- Details
- Fields & Relationships** (selected)
- 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

The 'Fields & Relationships' section is expanded, showing the configuration for the 'Total count' field:

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

Below this, instructions state: "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." There are two checkboxes:  Add Field and  Page Layout Name, with 'college Layout' selected. Buttons for 'Previous', 'Save & New', 'Save', and 'Cancel' are at the bottom.

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

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

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

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

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

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

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

## Step 4: Create a Lightning App

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

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

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

The screenshot shows the Salesforce Setup interface with the 'Tabs' tab selected. The main title is 'New Custom Object Tab'. Below it, the sub-section title is 'Step 2. Add to Profiles'. A note says: '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.' There are two radio button options: 'Apply one tab visibility to all profiles [Default On]' (selected) and 'Apply a different tab visibility for each profile'. To the right, there is a table with two columns: 'Profile' (list of user profiles) and 'Tab Visibility' (dropdown menu for each profile). At the bottom right of the table, there are 'Previous', 'Next', and 'Cancel' buttons.

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

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

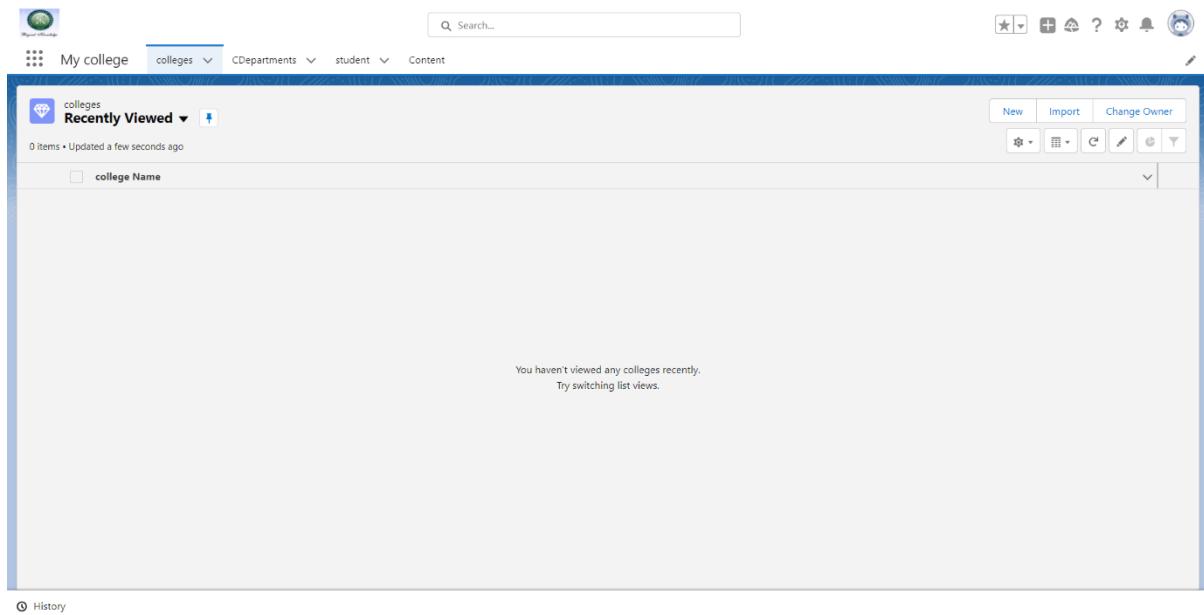
The screenshot shows the Salesforce Setup interface with the 'Tabs' page selected. The left sidebar has a search bar and navigation links for 'User Interface' and 'Rename Tabs and Labels'. The main content area is titled 'Custom Tabs' and contains sections for 'Custom Object Tabs', 'Web Tabs', 'Visualforce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

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

## **Conclusion:**

**Now, whenever you create or update a record in the "Department\_\_c" related to a "College\_\_c," the "TotalCount\_\_c" field on the "College\_\_c" will automatically update to show the total number of related records.**

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



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

My college colleges CDdepartments student Content

New college

\* = Required Information

Information

Owner krishna s

college Name kiot

phone 9087116402

Email kiot@ac.in

Location

Latitude 90

Longitude 80

Cancel Save & New Save

History

This screenshot shows the 'New college' form in the Salesforce Lightning interface. The 'college Name' field is populated with 'kiot'. The 'phone' field contains '9087116402'. The 'Email' field contains 'kiot@ac.in'. Under 'Location', the 'Latitude' is set to '90' and the 'Longitude' is set to '80'. The 'Owner' field shows 'krishna s'. At the bottom, there are three buttons: 'Cancel', 'Save & New' (which is highlighted in blue), and 'Save'.

My college colleges CDdepartments student Content

CDepartments Recently Viewed

1 item • Updated a few seconds ago

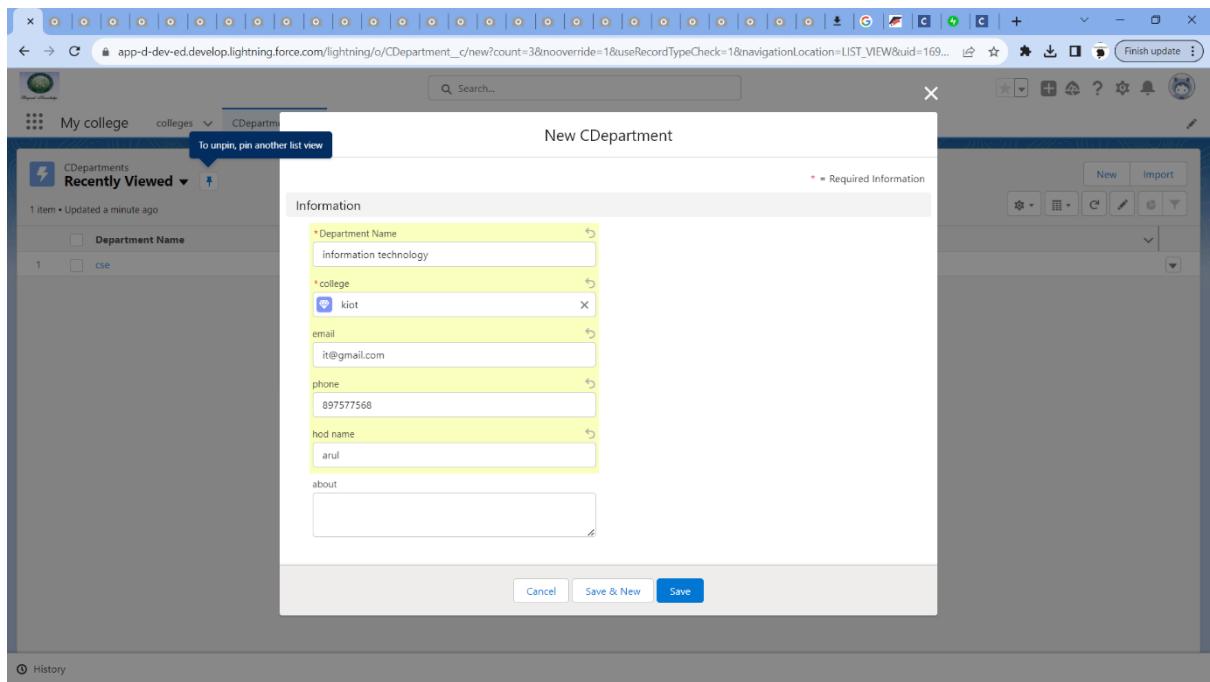
Department Name

cse

New Import

History

This screenshot shows the 'CDepartments' list view in the Salesforce Lightning interface. A single item named 'cse' is listed under the 'Department Name' column. At the top right, there are buttons for 'New' and 'Import' (which is highlighted in blue). The 'History' button is also visible at the bottom.



My college colleges CDDepts student Content

CDDepartment information technology

New Contact Edit New Opportunity

Related Details

Department Name  
information technology

college  
kiot

email  
it@gmail.com

phone  
897577568

hod name  
arul

about

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

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

History

My college colleges CDDepts student Content

college kiot

New Contact Edit New Opportunity

Related Details

college Name  
kiot

Total count  
1

phone  
9087116402

Email  
kiot@gmail.com

Location  
90, 80

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

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

History

My college colleges CDDepts student Content

CDDepts Recently Viewed

New Import

1 item • Updated a few seconds ago

Department Name

cse

History

My college colleges Recently Viewed

1 item • Updated a few seconds ago

college Name
1 kiot

New Import Change Owner

History

My college colleges CDdepartments student Content

college kiot

**Details**

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

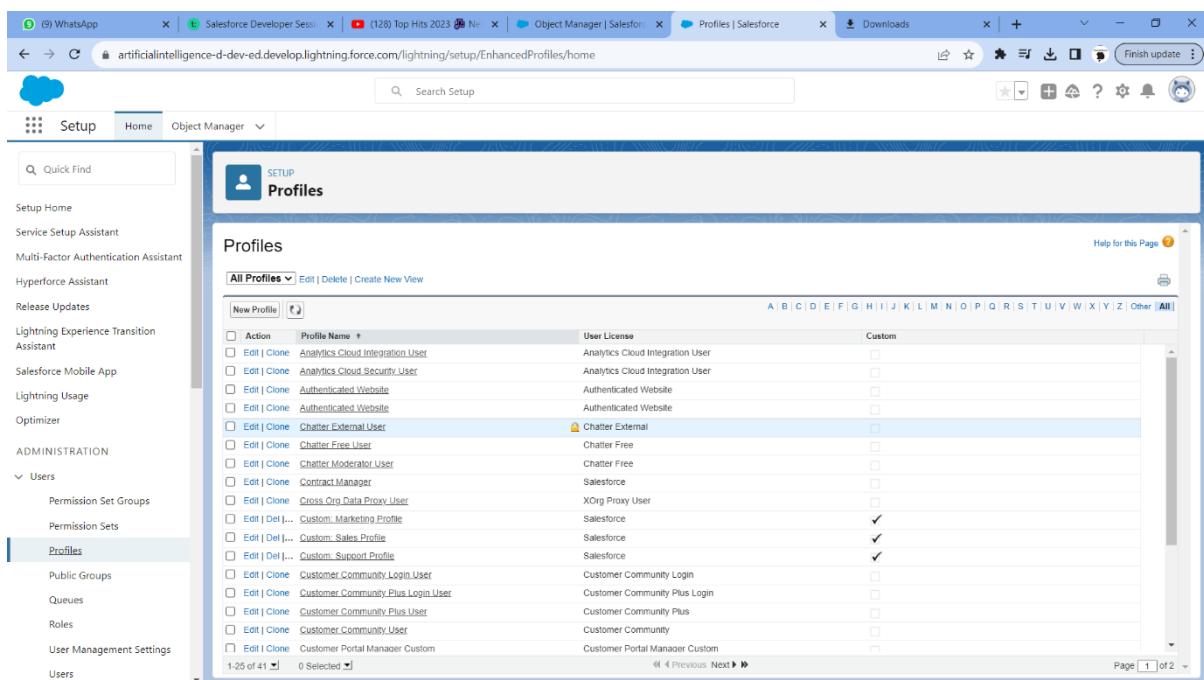
New Contact Edit New Opportunity

History

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

Solution:

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



The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected. The main area displays a list of profiles, each with a checkbox, a profile name, a user license, and a status column. The status column contains icons indicating whether the profile is standard or custom. The list includes profiles like 'Analytics Cloud Integration User', 'Analytics Cloud Security User', 'Authenticated Website', 'Chatter External User', 'Chatter Free User', 'Chatter Moderator User', 'Contract Manager', 'Cross Org Data Proxy User', 'Custom Marketing Profile', 'Custom Sales Profile', 'Custom Support Profile', 'Customer Community Login User', 'Customer Community Plus Login User', 'Customer Community Plus User', 'Customer Community User', and 'Customer Portal Manager Custom'. The status column for most profiles shows 'Custom' with a checkmark, except for a few which show 'Standard' with a standard icon.

The screenshot shows the Salesforce Setup interface under the Profiles section. The left sidebar includes options like Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, ADMINISTRATION, and Users (with sub-options: Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and Users). The main content area displays a table titled "Profiles" with the following data:

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

At the bottom, there are navigation links for "1 of 7" and "0 Selected".

The screenshot shows the "Clone Profile" page in the Salesforce Setup interface. The left sidebar is identical to the previous screenshot. The main content area has a heading "Clone Profile" and a sub-instruction "Enter the name of the new profile." Below this, a note says "You must select an existing profile to clone from." A table provides details about the existing profile being cloned:

Existing Profile	Standard Platform User
User License	Salesforce Platform
Profile Name	[Redacted]

At the bottom right are "Save" and "Cancel" buttons.

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

## Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

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

Save Cancel

Help for this Page

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

SETUP Home Object Manager

Quick Find Search Setup

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

## Manager

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

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

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

**Profile Detail**

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

**Page Layouts**

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

Help for this Page

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

SETUP Home Object Manager

Quick Find Search Setup

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

Finish update

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

Manager

Set the permissions and page layouts for this profile.

**Profile Edit**

Name	Manager	User License	Salesforce Platform	Description	Custom Profile
Analytics Studio (standard__Insights)	<input type="radio"/>	<input checked="" type="radio"/>	Platform (standard__Platform)	Visible	Default
App Launcher (standard__AppLauncher)	<input type="radio"/>	<input checked="" type="radio"/>	WDC (standard__Work)	<input type="radio"/>	<input checked="" type="radio"/>
slot (slot)	<input checked="" type="radio"/>	<input type="radio"/>			

**Custom App Settings**

Visible	Default
Analytics Studio (standard__Insights)	<input type="radio"/>
App Launcher (standard__AppLauncher)	<input type="radio"/>
slot (slot)	<input checked="" type="radio"/>

**Service Provider Access**

Tab Settings

Overwrite users' personal tab customizations

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

Custom Object Permissions

Object	Basic Access	Data Administration
Bank	Read Create Edit Delete View All Modify All	
customers	Read Create Edit Delete View All Modify All	

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Custom Object Permissions

Object	Basic Access	Data Administration
Enhancement Requests	Read Create Edit Delete View All Modify All	

Custom Object Permissions

Object	Basic Access	Data Administration
User External Credentials	Read Create Edit Delete View All Modify All	

Communication Subscription Channel Types

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

Custom Object Permissions

Object	Basic Access	Data Administration
Individuals	<input checked="" type="checkbox"/>	<input type="checkbox"/>
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Party Consents	<input type="checkbox"/>	<input type="checkbox"/>
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Custom Object Permissions

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

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

## Profiles

Custom Object Permissions

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

Session Settings

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

Password Policies

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

Changelog: Last updated 1 hour ago by anonymous

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

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

## Profiles

Custom Object Permissions

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

Session Settings

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

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

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

**Custom Object Permissions**

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

**Session Settings**

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

**Password Policies**

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

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

**All Users**

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

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

View: All Users | Edit | Create New | View

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>   Edit   Login	Adriana_Diva	dadan	test_diva_pas_4w@bytb9wtk.tszgrgshkpx3q8efoywms.h43hkzw6mea@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	JMS User
<input type="checkbox"/>   Edit	Chatter_Expert	Chatter	chatty.00d500000bcskkeab.lo0hfwmn0ite@chatter.salesforce.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>   Edit   Login	Ellington_Amelia	aell	amelia.ellington.146kxc95000jh.d6cwyodcu04wh.hnb0wmvwhho.wguctor1dalv@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/>   Edit	S_GCPA	GS	kot520@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>   Edit	User_Integration	integ	integration@00d500000bcskkeab.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>   Edit	User_Security	sec	insightssecurity@00d500000bcskkeab.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Security User

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

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

Finish update

Setup Home Object Manager

Users

New User

User Edit Save Save & New Cancel

General Information

First Name: [ ] Role: <None Specified>

Last Name: [ ] User License: Salesforce Integration

Alias: [ ] Profile: Salesforce API Only System Integrations

Email: [ ] Active:

Username: [ ] Marketing User:

Nickname: [ ] Offline User:

Title: [ ] Knowledge User:

Company: [ ] Flow User:

Department: [ ] Service Cloud User:

Division: [ ] Site.com Contributor User:

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

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

Accessibility Mode (Classic Only):

High-Contrast Palette on Charts:

Load Lightning Pages While Scrolling:

Debug Mode:

Help for this Page

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

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

Finish update

Setup Home Object Manager

Users

New User

User Edit Save Save & New Cancel

General Information

First Name: sowmya Role: <None Specified>

Last Name: balaji User License: Salesforce Platform

Alias: sbala Profile: Manager

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

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

Nickname: User169616771282564526 Offline User:

Title: worker Knowledge User:

Company: kiot bank Flow User:

Department:

Division:

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

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

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

High-Contrast Palette on Charts:  WDC User:

Load Lightning Pages While Scrolling:

Debug Mode:

Help for this Page

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

User Sowmya bala

User Detail

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

Compose

Inbox 5,318

support@salesforce.com <support@salesforce.com> to me

7:13 PM (0 minutes ago)

Welcome to Salesforce!

Click below to verify your account.

Verify Account

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

Username:  
2k21it@kiot.ac.in

Again, welcome to Salesforce!

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

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

**salesforce**

### Change Your Password

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

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

\* New Password

..... Good

\* Confirm New Password

..... Match

Security Question

In what city were you born?

\* Answer

salem

Change Password

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

Login | Salesforce x +

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

**salesforce**

Username  
2k21it@kiot.ac.in

Password  
.....

Log In

Remember me

Forgot Your Password?

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

WATCH ON DEMAND

AIDay

© 2023 Salesforce, Inc. All rights reserved.

Recently Viewed | Bank | Salesfo... x +

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

Incognito Finish update

kiot Bank customers Home

Search...

Recently Viewed ▾

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

Bank Name ↓

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

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

DISPLAY DENSITY

✓ Comfy

Compact

OPTIONS

Switch to Salesforce Classic ⓘ

Add Username

New Bank | Salesforce x +

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

Incognito Finish update

kiot Bank customers Home

Search...

Recently Viewed ▾

0 items • Updated a few seconds ago

Bank Name

New Bank

\* = Required Information

Information

\*Bank Name boi

Owner sowmiya bala

phoneno 0897754534

Cancel Save & New Save

**New customer | Salesforce**

Recently Viewed ▾

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

customer Name ↓

New customer

\* = Required Information

Information

\* customer Name: madhu

\* Bank: boi

Cancel Save & New Save

**madhu | customer | Salesforce**

customer madhu was created.

Related Details

customer Name: madhu

Bank: boi

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

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

New Contact Edit Delete

List View

This image shows two screenshots of the Salesforce Lightning Experience. The top screenshot displays the 'New customer' form with 'customer Name' set to 'madhu' and 'Bank' set to 'boi'. The bottom screenshot shows the newly created customer record 'madhu' on the details page, with the same name and bank information, and a green success message at the top stating 'customer madhu was created.'

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

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

Profiles

All Profiles | Edit | Delete | Create New View

New Profile

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

1.7 of 7 0 Selected | Page 1 of 1

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

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

Clone Profile

Enter the name of the new profile.

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

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

Save Cancel

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

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

Profiles

Profile salesmanage

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

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

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

**Profile Detail**

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

**Page Layouts**

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

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

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

Profiles

Profile Edit salesmanage

Set the permissions and page layouts for this profile.

**Profile Edit**

Name	salesmanage	User License	Salesforce Platform	Description	Custom Profile
					✓

**Custom App Settings**

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

**Service Provider Access**

**Tab Settings**

Overwrite users' personal tab customizations

**Standard Tab Settings**

Home	Default On
Accounts	Learning

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

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

Custom Object Permissions

	Basic Access	Create	Edit	Delete	Data Administration	Basic Access	Create	Edit	Data Administration
	Read	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"/>				
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 setup

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

Custom Object Permissions

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

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

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

Save | Save & New | Cancel

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

Setup Home Object Manager

Search Setup

User Management Settings

New User

User Edit

General Information

First Name:

Last Name:

Alias:

Email:

Username:

Nickname:

Title:

Company:

Department:

Division:

Role: <None Specified>

User License: Salesforce Integration

Profile: Salesforce API Only System Integrations

Active:

Marketing User:

Offline User:

Knowledge User:

Flow User:

Service Cloud User:

Site.com Contributor User:

Site.com Publisher User:

WDC User:

Data.com User Type: -None-

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

Accessibility Mode (Classic Only):

High-Contrast Palette on Charts:

Load Lightning Pages While Scrolling:

Debug Mode:

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

Setup Home Object Manager

Search Setup

User Management Settings

New User

User Edit

General Information

First Name: madhu

Last Name: b

Alias: mb

Email: 2k20cse179@kiot.ac.in

Username: 2k20cse179@kiot.ac.in

Nickname: User169616842428654192

Title: worker

Company: kiot bank

Department: Sales

Division:

Role: <None Specified>

User License: Salesforce Platform

Profile: salesmanager

Active:

Marketing User:

Offline User:

Knowledge User:

Flow User:

Service Cloud User:

Site.com Contributor User:

Site.com Publisher User:

WDC User:

Data.com User Type: -None-

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

Accessibility Mode (Classic Only):

High-Contrast Palette on Charts:

Load Lightning Pages While Scrolling:

Debug Mode:

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

Setup Home Object Manager

user

Users

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

Search Setup

Users

Mailing Address

Street: 4/194, ariyampalayam, utthamasolapuram ..  
City: SALEM  
Zip/Postal Code: 636308  
State/Province: TAMIL NADU  
Country:

Single Sign On Information

Federation ID:

Locale Settings

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

Approver Settings

Delegated Approver:   
Manager:   
Receive Approval Request Emails: Only if I am an approver  
 Generate new password and notify user immediately

Save Save & New Cancel

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

Setup Home Object Manager

user

Users

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

Search Setup

Users

Mailing Address

Street: 4/194, ariyampalayam, utthamasolapuram ..  
City: SALEM  
Zip/Postal Code: 636308  
State/Province: TAMIL NADU  
Country:

Single Sign On Information

Federation ID:

Locale Settings

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

Approver Settings

Delegated Approver:   
Manager:   
Receive Approval Request Emails: Only if I am an approver  
 Generate new password and notify user immediately

Save Save & New Cancel

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

Setup Home Object Manager

Search Setup

Cloud icon

User madhu b

User Detail

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

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Service

Embedded Service

Messaging for In-App and Web User Verification

User Interface

Action Link Templates

Actions & Recommendations

App Menu

Compose

Inbox 5,318

Starred

Snoozed

Sent

Drafts 5

More

Labels +

Welcome to Salesforce!

Click below to verify your account.

Verify Account

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

Username:  
2k20csit@kiot.ac.in

Again, welcome to Salesforce!

Reply Forward

Change Your Password | Salesforce

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



## Change Your Password

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

- 8 characters
- 1 letter
- 1 number

\* New Password  
..... Good

\* Confirm New Password  
..... Match

Security Question  
In what city were you born?

\* Answer  
india

Change Password

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

Recently Viewed | Bank | Salesforce

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

Recently Viewed

0 items • Updated a few seconds ago

Bank Name

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

List View

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... | + | Finish update

Setup Home Object Manager

Search Setup

Permission Sets

Permission Sets

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

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

All Permission Sets | Edit | Delete | Create New View

Action	Permission Set Label	Description	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 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	Access supervisor features in Service Cloud Voice contact centers th...	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Supervisor	Salesforce	
<input type="checkbox"/>	Experience Profile Manager	Lets users create, read, edit, and delete locations, sublocations, que...	Facility Manager
<input type="checkbox"/>	Facility Manager	Give your mobile workforce access to the Field Service mobile app. S...	Field Service Mobile
<input type="checkbox"/>	FieldServiceMobileStandardPermSet	Allow access to commerce merchandising features.	Commerce Merchandiser User Permission Set License Seat
<input type="checkbox"/>	Merchandiser	Read Access to all entities enabled by Order Management	Lightning Order Management User
<input type="checkbox"/>	Order Management Agent	Access to all features enabled by Order Management	Lightning Order Management User
<input type="checkbox"/>	Order Management Operations Manager	Limited access to Order Management features for Self Service	Lightning Order Management User
<input type="checkbox"/>	Order Management Shopper		

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 | 1-25 of 29 | 0 Selected |

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:

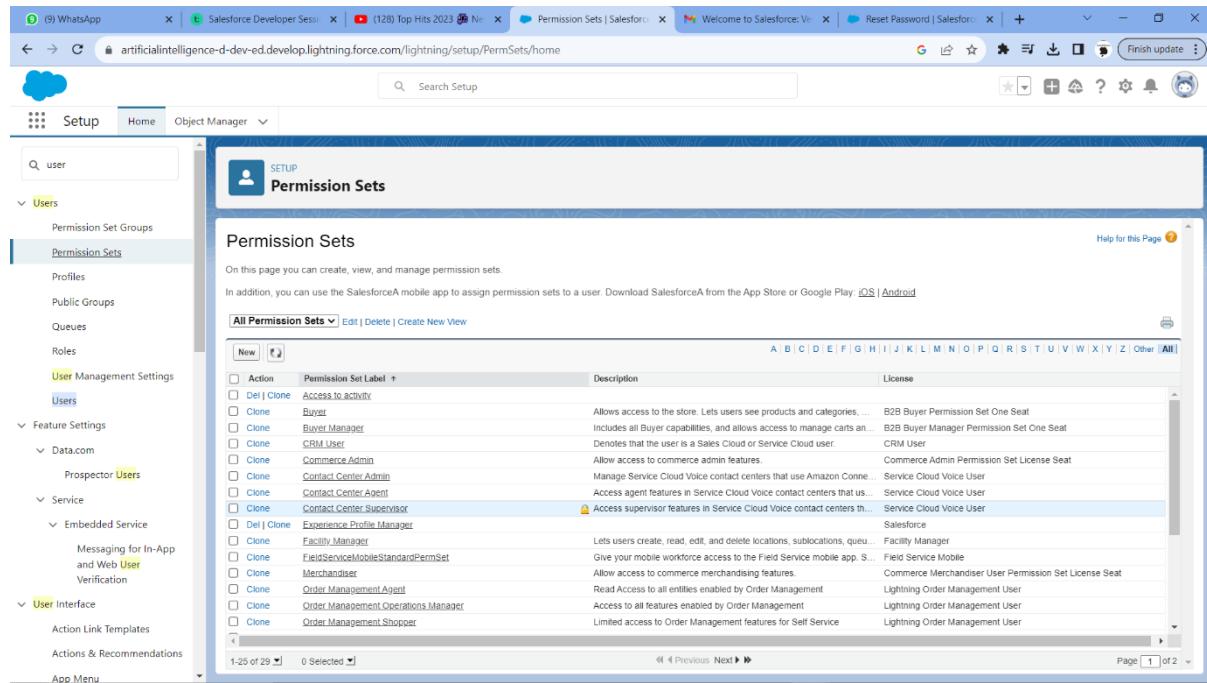
- Ensure that the Account records are owned by the respective users, with User A owning their records and User B owning their records.

## 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 'Permission Sets' page open. The left sidebar is collapsed, and the main content area displays a table of permission sets. The table columns are 'Action', 'Permission Set Label', 'Description', and 'License'. The 'Description' column contains detailed explanations for each permission set, such as 'Allows access to the store. Lets users see products and categories.' for the 'Access\_to\_Activity' permission set. The 'License' column indicates which license is required for each permission set, such as 'B2B Buyer Permission Set One Seat' for the 'Access\_to\_Activity' permission set. The table also includes links for 'Edit', 'Delete', and 'Create New 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 Conne...	Service Cloud Voice User
<input type="checkbox"/>	Contact_Center_Admin	Access agent features in Service Cloud Voice contact centers that u...	Service Cloud Voice User
<input type="checkbox"/>	Contact_Center_Agent	Access supervisor features in Service Cloud Voice contact centers th...	Salesforce
<input type="checkbox"/>	Contact_Center_Supervisor	Lets users create, read, edit, and delete locations, sublocations, que...	Facility Manager
<input type="checkbox"/>	Experience_Profile_Manager	Give your mobile workforce access to the Field Service mobile app. S...	Field Service Mobile
<input type="checkbox"/>	Facility_Manager	Allow access to commerce merchandising features.	Commerce Merchandiser User Permission Set License Seat
<input type="checkbox"/>	FieldServiceMobileStandardPermSet	Read Access to all entities enabled by Order Management	Lightning Order Management User
<input type="checkbox"/>	Merchandiser	Access to all features enabled by Order Management	Lightning Order Management User
<input type="checkbox"/>	Order_Management_Agent	Limited access to Order Management features for Self Service	Lightning Order Management User
<input type="checkbox"/>	Order_Management_Operations_Manager		
<input type="checkbox"/>	Order_Management_Shopper		

The screenshot shows the Salesforce Setup interface with the 'Permission Sets' section selected. A sub-menu for 'Users' is open, showing options like 'User Management Settings' and 'Users'. The main panel displays a 'Create' form for a new permission set. The 'Label' field contains 'user', and the 'API Name' field contains 'User'. The 'Description' field is empty. The 'Session Activation Required' checkbox is unchecked. Below the form, a note asks 'Who will use this permission set?' with three options: 'None', 'Specific user license', and 'Specific permission set license'. A link 'Learn more here.' is provided. The 'License' dropdown is set to '-None-'.

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

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

**Permission Set Overview:**

Setting	Description
License	Permissions to access objects and fields, and settings such as tab availability
Session Activation Required	checkbox
Last Modified By	GOPAL_S 01/10/2023, 7:29 pm

**Apps:**

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

**User Management Settings:**

- Data.com
- Prospector Users
- Service
- Embedded Service
- Messaging for In-App and Web User Verification
- Action Link Templates
- Actions & Recommendations

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

**Object Settings:**

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

Salesforce Developer Session | WhatsApp | Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce: Ve... | Reset Password | Salesforce | Finish update

Setup Home Object Manager

Search Setup

User

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Service

Embedded Service

Messaging for In-App and Web User Verification

User Interface

Action Link Templates

Actions & Recommendations

Permission Set

**salesmanager**

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

Permission Set Overview > Object Settings Bank

Bank

Tab Settings

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

Object Permissions

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

Field Permissions

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

Video Tutorial | Help for this Page

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

Salesforce Developer Session | WhatsApp | Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce: Ve... | Reset Password | Salesforce | Finish update

Setup Home Object Manager

Search Setup

User

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Service

Embedded Service

Messaging for In-App and Web User Verification

User Interface

Action Link Templates

Actions & Recommendations

App Menu

Permission Set

**salesmanager**

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

Permission Set Overview > Object Settings Bank

Bank

Tab Settings

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

Object Permissions

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

Field Permissions

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

Video Tutorial | Help for this Page

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

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

Setup Home Object Manager

Search Setup

User salesmanager

Current Assignments

No assignments defined.

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

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

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

Setup Home Object Manager

Search Setup

Select Users to Assign

All Users

1 item selected

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

Cancel Next

This screenshot shows the 'Select Users to Assign' dialog box. The left sidebar is identical to the previous screenshot. The main area lists users with checkboxes next to their names. The user 'madhu b' has a checked checkbox. The 'Next' button is visible at the bottom right of the dialog.

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

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

Setup Home Object Manager

Select an Expiration Option For Assigned Users

No expiration date

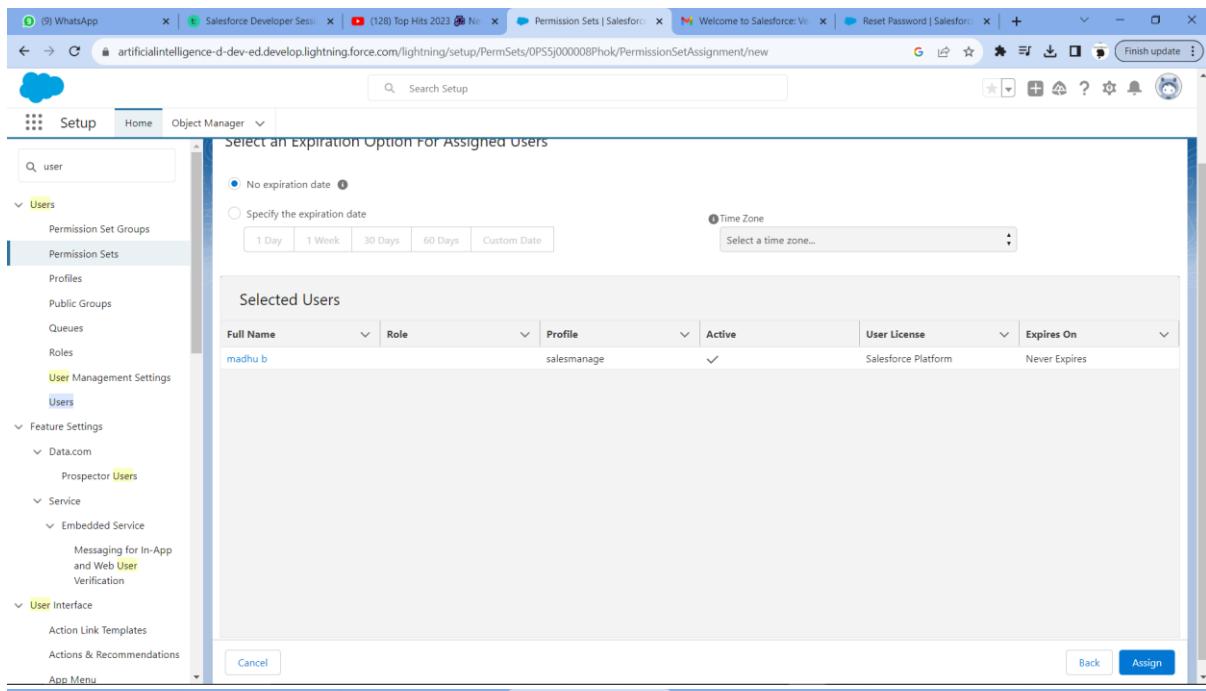
Specify the expiration date

Time Zone

Selected Users

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

Cancel Back Assign



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

artificialintelligence-d-dev-ed.lightning.force.com/one/one.app#eyjjb21wb25lbREZWYiOjUzZXr1cF9wbGF0Zm9ybV9wZXItczpwc2FSZXN1bHRQYWdliw...

Setup Home Object Manager

PERMISSION SET 'SALESMANA'

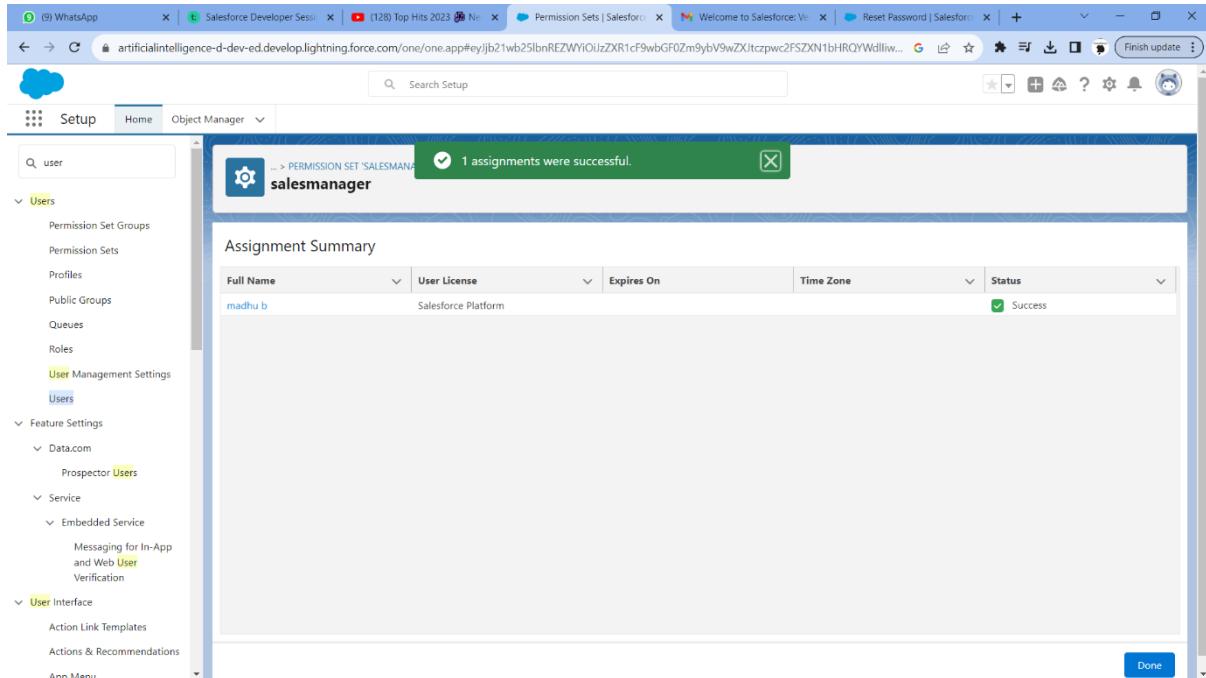
1 assignments were successful.

salesmanager

Assignment Summary

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

Done



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.

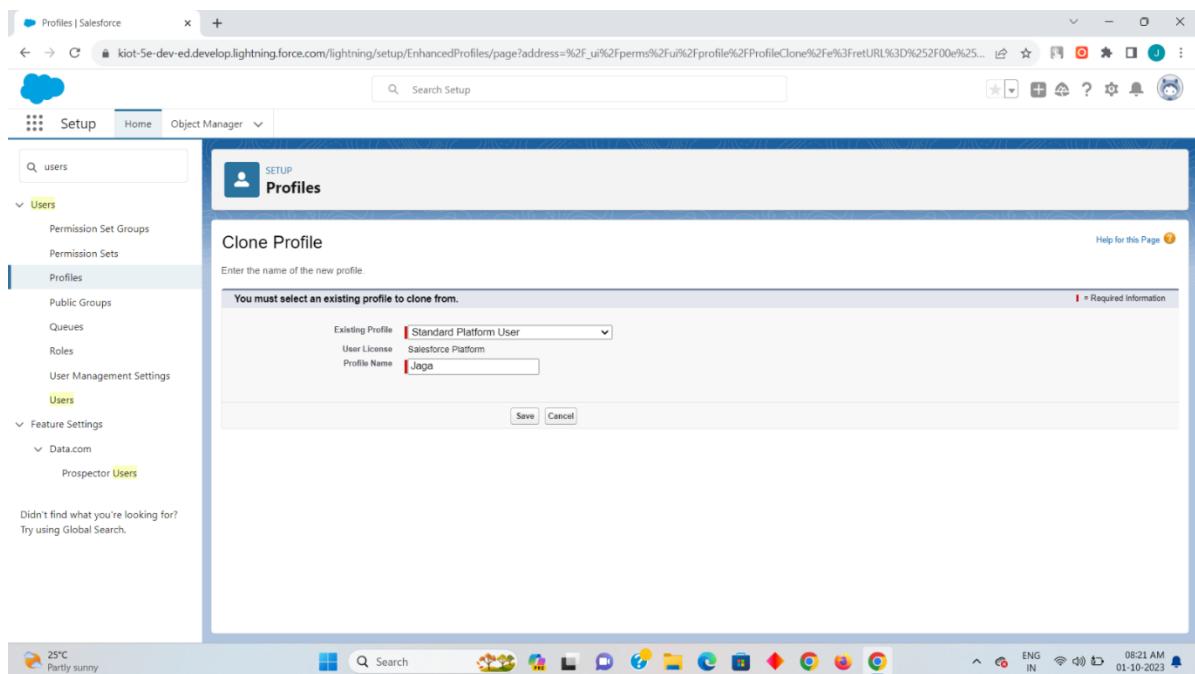
## Setup-quick search[profile]

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.
- Central Content:** The "Profiles" section with the heading "All Profiles". It includes a table with columns: Action, Profile Name, User License, and Custom.
- Table Data:** A list of profiles with their respective User Licenses and checkboxes for selection. Some profiles have checkmarks in the "Custom" column.
- Bottom Navigation:** Page 1 of 2, Previous, Next, and a weather widget indicating 25°C and Partly sunny.

## Step 2:

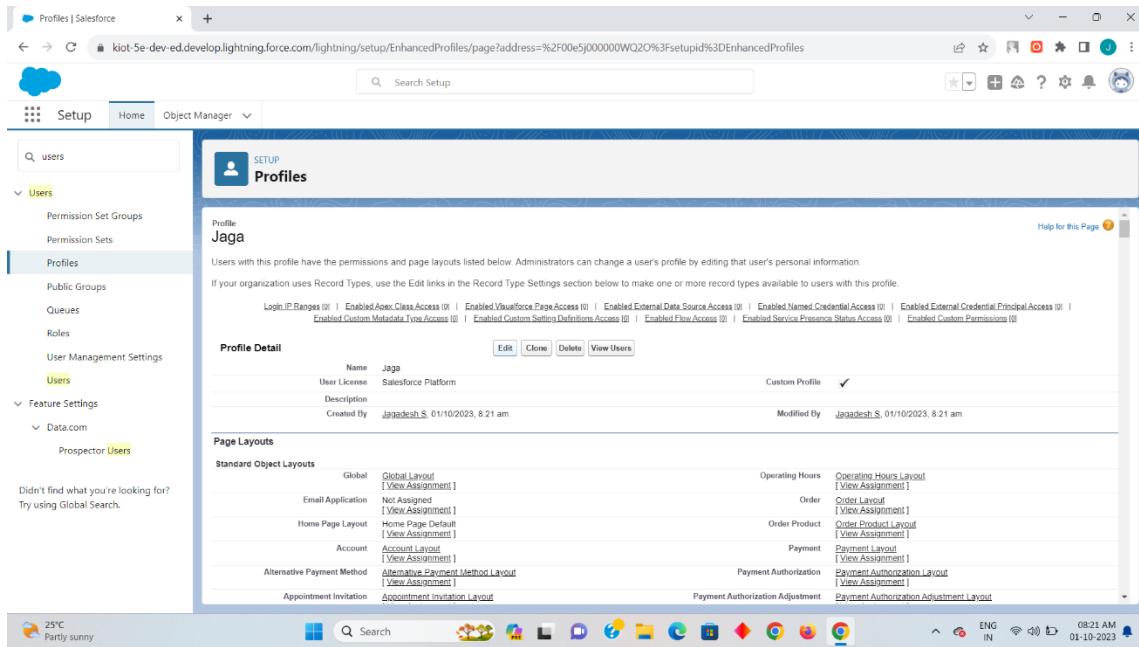
Click on the new to create a new profile along with the label and Api



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

## Step 3:

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



Profiles | Salesforce

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

Setup Home Object Manager

Search Setup

Users

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

Users

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

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

25°C Partly sunny

SETUP Profiles

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

Custom Object Permissions

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

Session Settings

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

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

ENG IN 08:21 AM 01-10-2023

This screenshot shows the 'Profiles' section of the Salesforce Setup. It displays a grid of checkboxes for enabling various features like Communication Subscription, Locations, and Push Topics across different profile types. Below this is a 'Custom Object Permissions' section with two tables for 'Providers' and 'Resources'. At the bottom, there's a 'Session Settings' section with options for session timeout and security level, and a note about Experience Cloud login policies. The interface includes standard Salesforce navigation elements like a search bar and a left sidebar with user management links.

Profiles | Salesforce

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

Setup Home Object Manager

Search Setup

Users

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

Users

- Feature Settings
- Data.com
- Prospector Users

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

25°C Partly sunny

SETUP Profiles

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

Custom Object Permissions

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

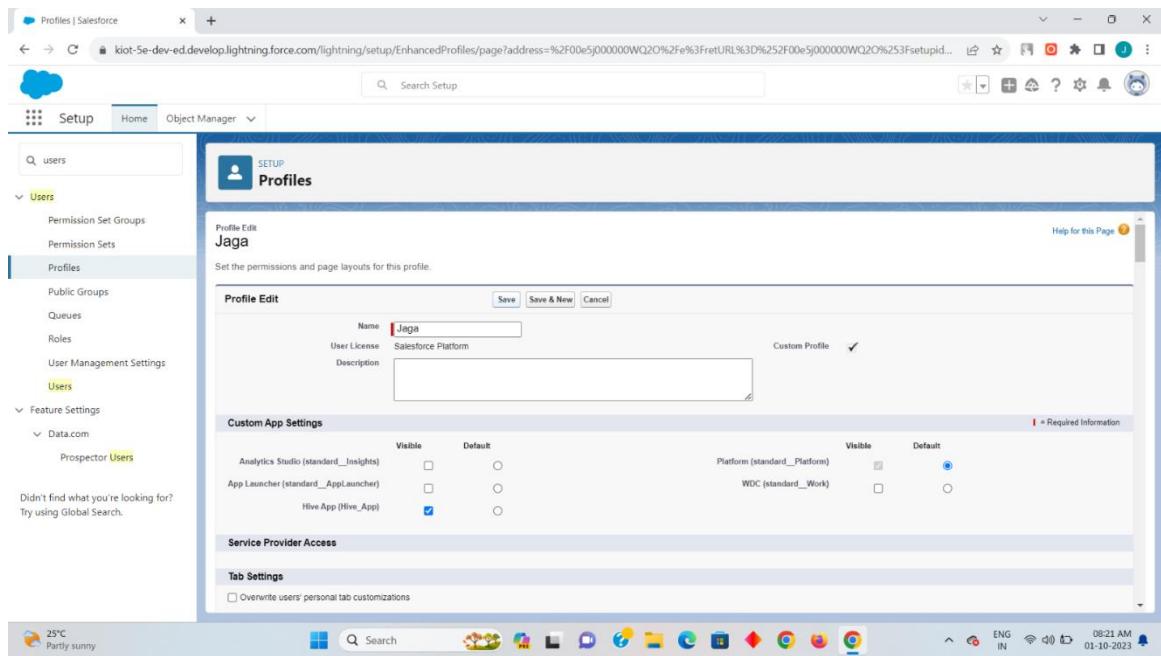
Session Settings

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

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

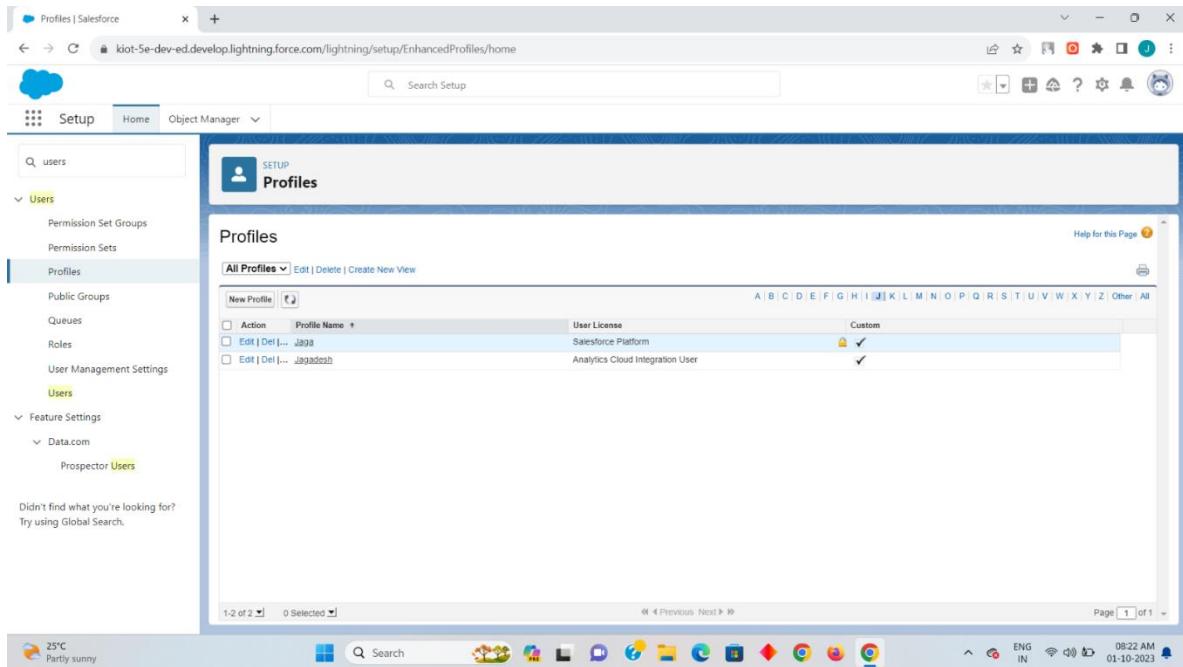
ENG IN 08:21 AM 01-10-2023

This screenshot is identical to the one above, showing the 'Profiles' section of the Salesforce Setup. It displays the same grid of checkboxes for enabling various features, the same 'Custom Object Permissions' tables, and the same 'Session Settings' section. The interface and layout are consistent with the first screenshot.



## Step 4

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



## Step 5:

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

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

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Chatter Expert	Chatter	chatty.00d500000c8josef.6z9bkrkhd4@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	Edit	Grey Jane	jgrey	jane_gran_fygnimmajm.c27d2kiogth@gmail.com	<input checked="" type="checkbox"/>	Customer Community User
<input type="checkbox"/>	Edit	S.Jaga	JS	jaga38@gmail.com	<input type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	Edit	S.Jagadesh	JS	w0w@gmail.com	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Edit	S.Jagadesh	JS	jaga1117@gmail.com	<input type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	Edit	User_Integration	Integ	integration@00d500000c8josef.com	<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	Edit	User_Security	sec	insightssecurity@00d500000c8josef.com	<input checked="" type="checkbox"/>	Analytics Cloud Security User

Users | Salesforce

Setup Home Object Manager

Search Setup

New User

User Edit Save Save & New Cancel

General Information

First Name: Jagadesh11  
Last Name: S  
Alias: J  
Email: jwv123@gmail.com  
Username: jwv123@gmail.com  
Nickname: User169612875144962592  
Title:   
Company:   
Department:   
Division:

Role: Director, Channel Sales  
User License: Salesforce Platform  
Profile: -None-  
Active: Jaga  
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-  
Data.com Monthly Addition Limit: Default Limit (300)  
Accessibility Mode (Classic Only):   
High-Contrast Palette on Charts:

Help for this Page

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

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Q Search

08:23 AM ENG IN 01-10-2023

Users | Salesforce

Setup Home Object Manager

Search Setup

New User

User Edit Save Save & New Cancel

General Information

First Name: Jagadesh22  
Last Name: S  
Alias: J  
Email: jw11@gmail.com  
Username: jw11@gmail.com  
Nickname: User169612879983618745  
Title:   
Company:   
Department:   
Division:

Role: Marketing Team  
User License: Salesforce Platform  
Profile: -None-  
Active: Jaga  
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-  
Data.com Monthly Addition Limit: Default Limit (300)  
Accessibility Mode (Classic Only):   
High-Contrast Palette on Charts:

Help for this Page

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

25°C Partly sunny

Q Search

08:23 AM ENG IN 01-10-2023

Users | Salesforce

Setup Home Object Manager

Search Setup

All Users

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

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

View: All Users

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	<input type="button" value="Edit"/> S.Jagadeesh	J	jwv11@gmail.com	CEO	<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	<input type="button" value="Edit"/> S.Jagadeesh	J	jwv117@gmail.com	SE Admin	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	<input type="button" value="Edit"/> S.Jagadeesh	J	jwv117@gmail.com	Channel Sales Team	<input type="checkbox"/>	Standard Platform User
<input checked="" type="checkbox"/>	<input type="button" value="Edit"/> S.Jagadeesh11	J	jwv123@gmail.com	Director, Channel Sales	<input checked="" type="checkbox"/>	Jaga
<input checked="" type="checkbox"/>	<input type="button" value="Edit"/> S.Jagadeesh22	J	jwv123@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Marketing Team

New User  Add Multiple Users

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

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

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Q Search

08:24 AM ENG IN 01-10-2023

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

## Step 6:

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

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

Permission Sets | Salesforce

kiot-5e-dev-ed.lightning.force.com/lightning/setup/PermSets/home

Setup Home Object Manager

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

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](#)

New [Clone](#)

Action	Permission Set Label	Description	License
<input type="checkbox"/>	<a href="#">Clone</a>	Buyer	B2B Buyer Permission Set One Seat
<input type="checkbox"/>	<a href="#">Clone</a>	Buyer Manager	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/>	<a href="#">Clone</a>	CRM User	CRM User
<input type="checkbox"/>	<a href="#">Clone</a>	Commerce Admin	Commerce Admin Permission Set License Seat
<input type="checkbox"/>	<a href="#">Clone</a>	Contact Center Admin	Manage Service Cloud Voice contact centers that use Amazon Commerce
<input type="checkbox"/>	<a href="#">Clone</a>	Contact_Center_Agent	Access agent features in Service Cloud Voice contact centers that use Amazon Commerce
<input type="checkbox"/>	<a href="#">Clone</a>	Contact_Center_Supervisor	Access supervisor features in Service Cloud Voice contact centers that use Amazon Commerce
<input type="checkbox"/>	<a href="#">Del/Clone</a>	Experience Profile Manager	Salesforce
<input type="checkbox"/>	<a href="#">Clone</a>	Facility Manager	Facility Manager
<input type="checkbox"/>	<a href="#">Clone</a>	FieldServiceMobileStandardPermSet	Field Service Mobile
<input type="checkbox"/>	<a href="#">Clone</a>	Merchandise	Commerce Merchandise User Permission Set License Seat
<input type="checkbox"/>	<a href="#">Clone</a>	OrderManagementAgent	Lightning Order Management User
<input type="checkbox"/>	<a href="#">Clone</a>	OrderManagementOperationsManager	Lightning Order Management User

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

1-25 of 30 | [Selected](#)

Page | 1 of 2

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

25°C Partly sunny

Q Search

ENG IN 08:24 AM 01-10-2023

Permission Sets | Salesforce

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

Setup Home Object Manager

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Permission Set Create

Enter permission set information

Label:  API Name:  Session Activation Required:

Select the type of users who will use this permission set

Who will use this permission set?

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

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

License:

Save Cancel

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

25°C Partly sunny

Q Search

ENG IN 08:24 AM 01-10-2023

Permission Sets | Salesforce

https://kiot-5e-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2FOP5\$000008Pgt%3FsfdclframeOrigin%3Dhttps%253A%252F%252Fkiot-5e-dev-ed.devel...

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

ENG IN 08:24 AM 01-10-2023

## SETUP Permission Sets

### Permission Set permission12

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

Video Tutorial | Help for this Page

**Permission Set Overview**

Description	API Name	permission12
License	Namespace Prefix	
Session Activation Required	Created By	Jagadesh_S_01/10/2023, 8:24 am
Last Modified By		

**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

Permission Sets | Salesforce

https://kiot-5e-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2FOP5\$000008Pgt%3DsfdlEntityPermissions

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

ENG IN 08:25 AM 01-10-2023

## SETUP Permission Sets

### Permission Set permission12

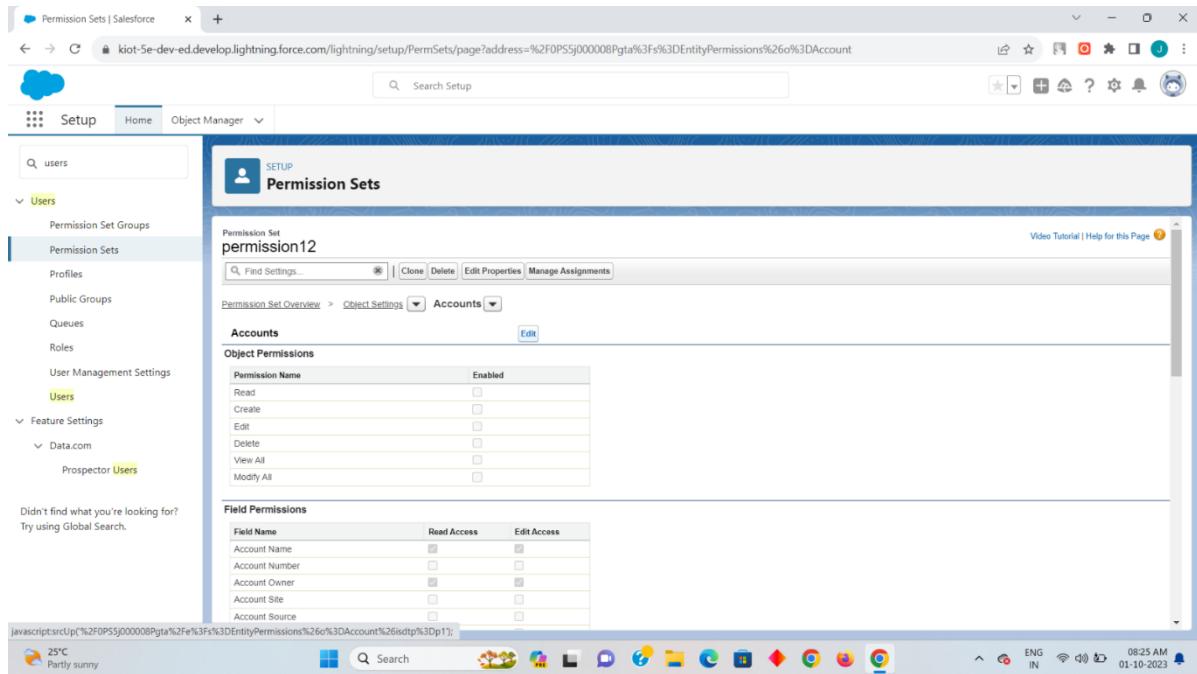
Find Settings | Clone | Delete | Edit Properties | Manage Assignments

Video Tutorial | Help for this Page

Permission Set Overview > Object Settings

**Object Settings**

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



## Step 7:

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

The screenshots illustrate the configuration of a Permission Set in the Salesforce Setup. The permission set, named 'permission12', is applied to the 'Accounts' object. In the 'Object Permissions' section, the 'Delete' checkbox is checked under the 'Enabled' column for the 'Delete' permission. This change is reflected in the 'Field Permissions' section, where the 'Delete' checkbox is also checked for the 'Account' object's 'Delete' field.

## Step 8

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

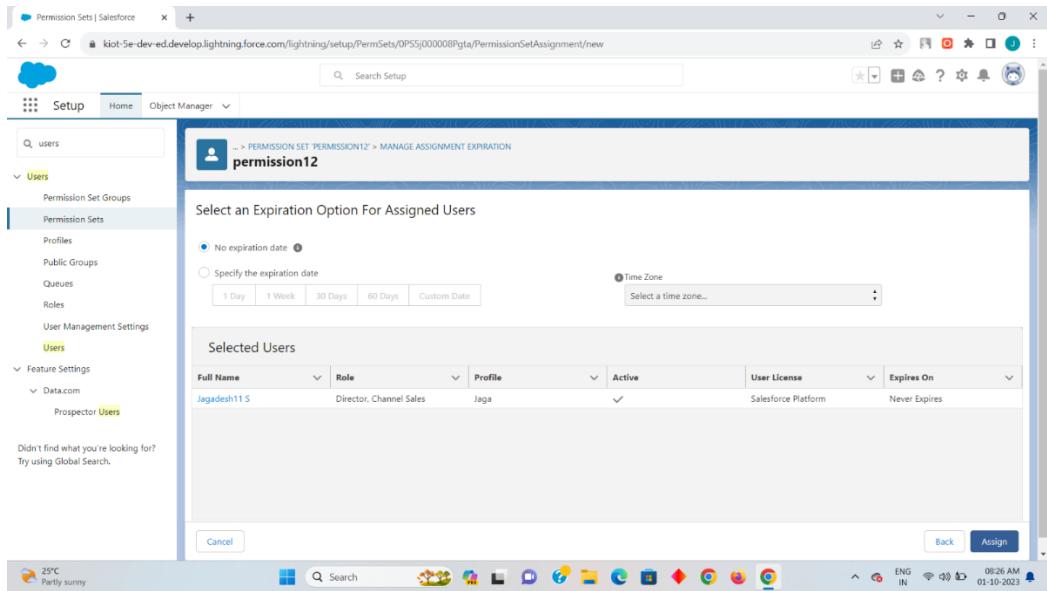
The screenshot shows the 'Permission Sets | Salesforce' page. The left sidebar is expanded, showing 'Users' selected under 'Permission Sets'. The main content area is titled 'permission12' and shows a decorative illustration of a cactus and sun. Below it, a message says 'No assignments defined.' A small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

This screenshot shows the 'PERMISSION SET permission12 > MANAGE ASSIGNMENT EXPIRATION' screen. It displays a list of users under 'All Users'. One user, 'jagadesh', is highlighted in the search bar. The list includes:

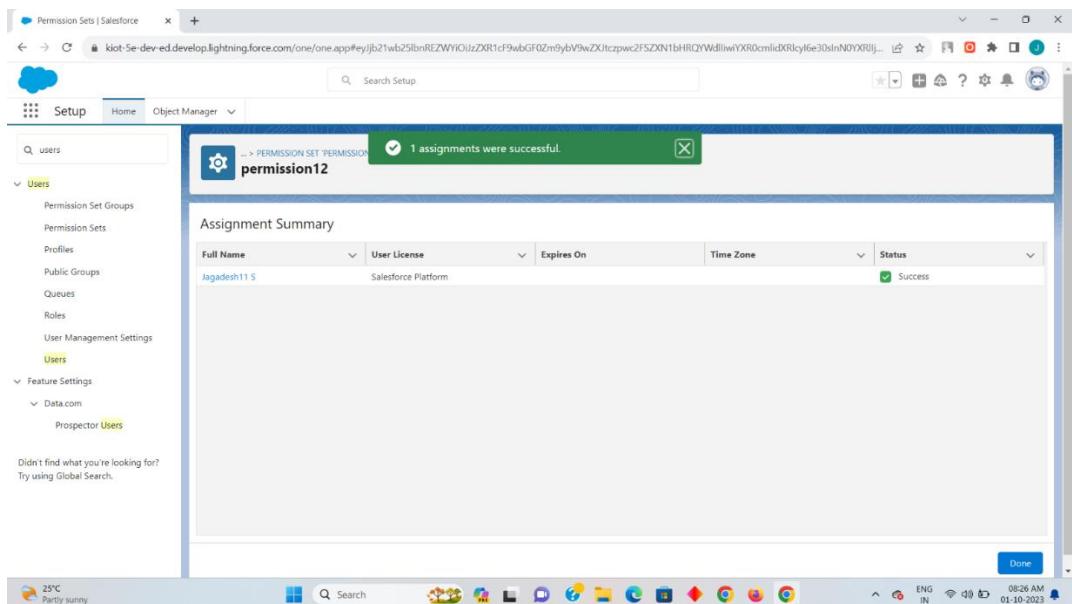
Full Name	Alias	Username	Role	Active	Profile
jagadesh S	JS	w0w@gmail.com	SF Admin	<input checked="" type="checkbox"/>	System Administrator
jagadesh S	JS	jaga1117@gmail.com	Channel Sales Team	<input type="checkbox"/>	Standard Platform User
jagadesh11 S	js	jww123@gmail.com	Director, Channel Sales	<input checked="" type="checkbox"/>	Jaga
jagadesh22 S	js	jaat@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Jaga

This screenshot shows the same 'PERMISSION SET permission12 > MANAGE ASSIGNMENT EXPIRATION' screen. Now, two users are selected: 'Jagadesh S' and 'Jagadesh11 S'. The list remains the same as in the previous screenshot.

Click on next.



Now click on Assign.



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

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

Solution:

#### Step 1: Create a Custom Object

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

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

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

**Details** Related

**Information**

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

**Message Content**

Subject <b>Thank You For Completing Our Survey!</b>	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 <a href="#">Rakesh Gupta</a> , 12/21/2020, 4:23 PM	Last Modified By <a href="#">Rakesh Gupta</a> , 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.**

Survey - Thank You Email

Description: Survey - Thank You Email

Unique Name: Survey\_Thank\_You\_Email

Object: Survey Result

Email Template: Thank You Email - Survey

Recipient Type: User

Available Recipients:

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

Selected Recipients:

- Email Field: Email

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: Save Response      \* API Name: Save\_Response

Description:

How Many Records to Create  
 One  
 Multiple

How to Set the Record Fields  
 Use all values from a record  
 Use separate resources, and literal values

Create a Record of This Object  
\* Object: Survey Result

Set Field Values for the Survey Result

Field	Value
Comment__c	<input type="text" value="A_a Comment"/>
Email__c	<input type="text" value="A_a Email &gt; Value"/>
Name__c	<input type="text" value="(!Name.firstName) (!Name.lastName)"/>
Rating__c	<input type="text" value="A_a Rating"/>
<a href="#">+ Add Field</a>	
<input type="checkbox"/> Manually assign variables	

Cancel      Done

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

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

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

## 4. Clicks on the Survey – Thank You Email email alert.

### 5. Click Done.

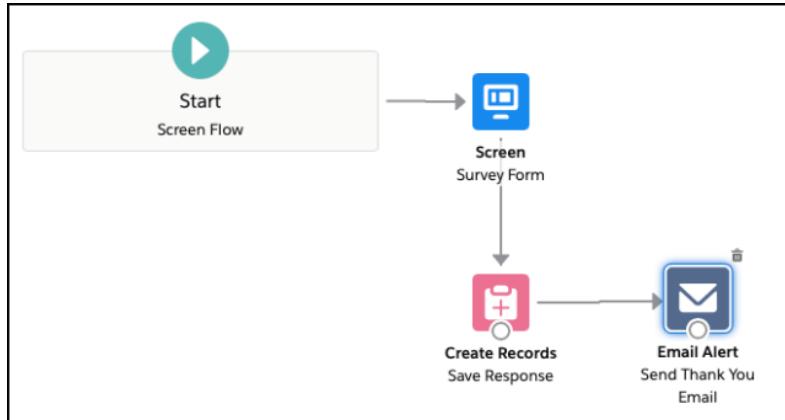
Edit "Survey - Thank You Email" email alert

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

* Label	* API Name
Send Thank You Email	Send_Thank_You_Email
Description	
Set Input Values	
A_a * Record ID	{!Save_Response}

Cancel Done

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



### 1. Click Save.

2. Enter Flow Label the API Name will auto-populate.

3. Click Show Advanced.

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

5. Type: Screen Flow

6. API Version for Running the Flow: 51

7. Interview Label: Survey

{!\$Flow.CurrentDateTime}

8. Click Save.

Save as

A New Version A New Flow

\* Flow Label \* Flow API Name

Survey Survey

Description

Hide Advanced

How to Run the Flow i

User or System Context—Depends on How Flow is Launched

\* Type

Screen Flow

\* API Version for Running the Flow

51

Interview Label i

Insert a resource... 🔍

Survey {!\$Flow.CurrentDateTime}

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

Status: Active

Type: Screen Flow

Version Number: 2

Cancel Save

The screenshot shows the 'Save as' dialog for a new flow. The 'A New Version' button is highlighted. The flow is named 'Survey' with an API name of 'Survey'. The 'How to Run the Flow' setting is 'User or System Context—Depends on How Flow is Launched'. The flow type is 'Screen Flow' and the API version is '51'. The interview label is set to the formula '{!\$Flow.CurrentDateTime}'. The status is 'Active', the type is 'Screen Flow', and the version number is '2'. The dialog includes 'Cancel' and 'Save' buttons.

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

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

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

The screenshot shows the Salesforce IDE interface. At the top, there is a menu bar with options like File, Edit, Debug, Test, Workspace, Help, and navigation arrows. Below the menu is a tab bar with 'VFPageToLC.app \*'. The main area contains the following code:

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

At the bottom of the interface, there is a blue footer bar with the text 'Logs, Tests, and Problems' and a small icon.

## 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**.

The screenshot shows the Visualforce Page Editor interface. At the top, there's a header with 'Visualforce Page' and 'Survey'. Below it is a 'Page Edit' toolbar with buttons for 'Save', 'Quick Save', 'Cancel', 'Where is this used?', 'Component Reference', and 'Preview'. A note 'I = Required Information' is present. The main area has a 'Page Information' section where 'Label' and 'Name' are set to 'Survey', and a 'Description' field is empty. Underneath are checkboxes for 'Available for Lightning Experience, Experience Builder sites, and the mobile app' (checked) and 'Require CSRF protection on GET requests' (unchecked). Below this is a 'Visualforce Markup' tab which contains the following code:

```
<apex:page showheader="false" lightningStylesheets="true">
<html>
<head>
<apex:includeLightning />
<!--Use apex:includeLightning to add the Lightning Components for Visualforce JavaScript library to your Visualforce page-->
</head>
<body class="slds-scope">
<div id="flowContainer" />
<script>
var statusChange = function (event) {
    if(event.getParam("status") === "FINISHED") {
        var outputVariables = event.getParam("outputVariables");
        var key;
        for(key in outputVariables) {
            if(outputVariables[key].name === "myOutput") {
                // Your logic here
            }
        }
    }
};
$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://kathiarch-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	   	
Clickjack Protection Level	Allow framing by the same origin only (Recommended)	
Require Secure Connections (HTTPS)	<input checked="" type="checkbox"/>	
Lightning Features for Guest	<input checked="" type="checkbox"/>	
Users	   	
Upgrade all requests to HTTPS	<input checked="" type="checkbox"/>	
Enable Content Sniffing Protection	<input checked="" type="checkbox"/>	
Enable Browser Cross Site Scripting Protection	<input checked="" type="checkbox"/>	
Referrer URL Protection	<input checked="" type="checkbox"/>	
Guest Access to the Payments API	<input type="checkbox"/>	

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

## Proof of Concept

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

Survey

Name

First Name  
Alok

Last Name  
Sinfal

\*Email  
[REDACTED]

\*Rating  
5

\*Comment  
Awesome Blog 

**Next**

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

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

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

8:09 PM (1 minute ago)   

Hi Alok Sinfal,

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

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

Thanks,  
Automation Champion