

NAAN MUDHALVAN

ASSIGNMENT

on

[SALESFORCE]

**CREATION OF AN APPLICATION
FOR SCHOOL MANAGEMENT**

NAME – REMINA R

NM ID -

FC8350AF87EB2C5827F4F1BCEF36F061

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.

Setup Home Object Manager

New Custom Object

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

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

Custom Object Information: I = Required Information

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

Label: **Example:** Account

Plural Label: **Example:** Accounts

Start with vowel sound:

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

Object Name: **Example:** Account

Description:

Context-Sensitive Help Setting:

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

Contact Name:

Enter Record Name Label and Format: [What is this?](#)

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: **Example:** Account Name

Data Type:

Optional Features:

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

Object Classification: [What is this?](#)

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

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

Deployment Status: [What is this?](#)

- In Development
- Deployed

Search Status: [What is this?](#)

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

Allow Search

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

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

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

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

The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. A message 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

Custom Object Information:

- Label: Department (Required)
- Plural Label: Departments (Required)
- Description: (Empty text area)
- Context Sensitive Help Setting:
 - Open the standard Salesforce.com Help & Training window
 - Open a window using a Visualforce page
- Contact Name: (Empty dropdown menu)

Enter Record Name Label and Format:

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

- Record Name: Department Name (Required)
- Data Type: Text

Optional Features:

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

Object Classification:

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

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

Deployment Status:

- In Development
- Deployed

Search Status:

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

- Allow Search

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

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

Buttons: Save, Save & New, Cancel

Step 2: Create a Master-Detail Relationship

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

1. Go to Setup > Object Manager.
2. Click on "College__c" to open its settings.
3. In the left sidebar, click on "Fields & Relationships."

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

Setup | Home | Object Manager

SETUP > OBJECT MANAGER
CDepartment

Details **Details**

Fields & Relationships Description

Page Layouts API Name: CDepartment__c

Lightning Record Pages Custom

Buttons, Links, and Actions ✓

Compact Layouts Singular Label: CDepartment

Field Sets Plural Label: CDepartments

Object Limits Deployment Status: Deployed

Record Types Help Setting: Standard: salesforce.com Help Window

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

Edit **Delete**

Setup | Home | Object Manager

SETUP > OBJECT MANAGER
CDepartment

Details **New Relationship**

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

Help for this Page

Step 3 of 8

Previous Next Cancel

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

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.

ReadWrite: Allows users with at least ReadWrite access to the Master record to create, edit, or delete related Detail records.

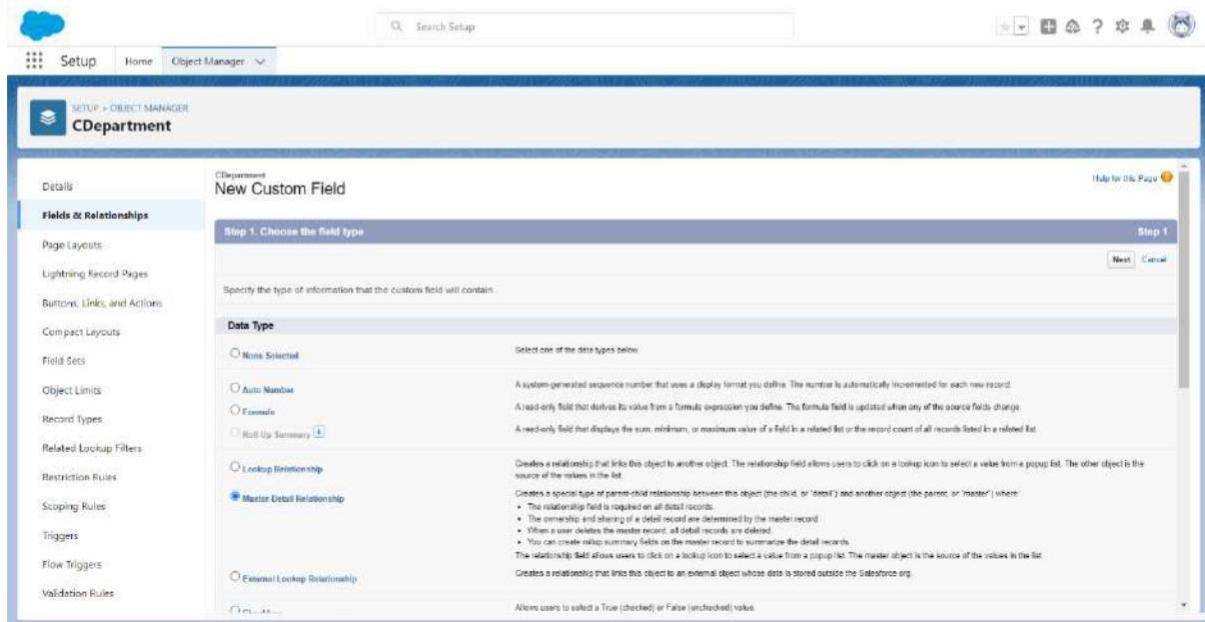
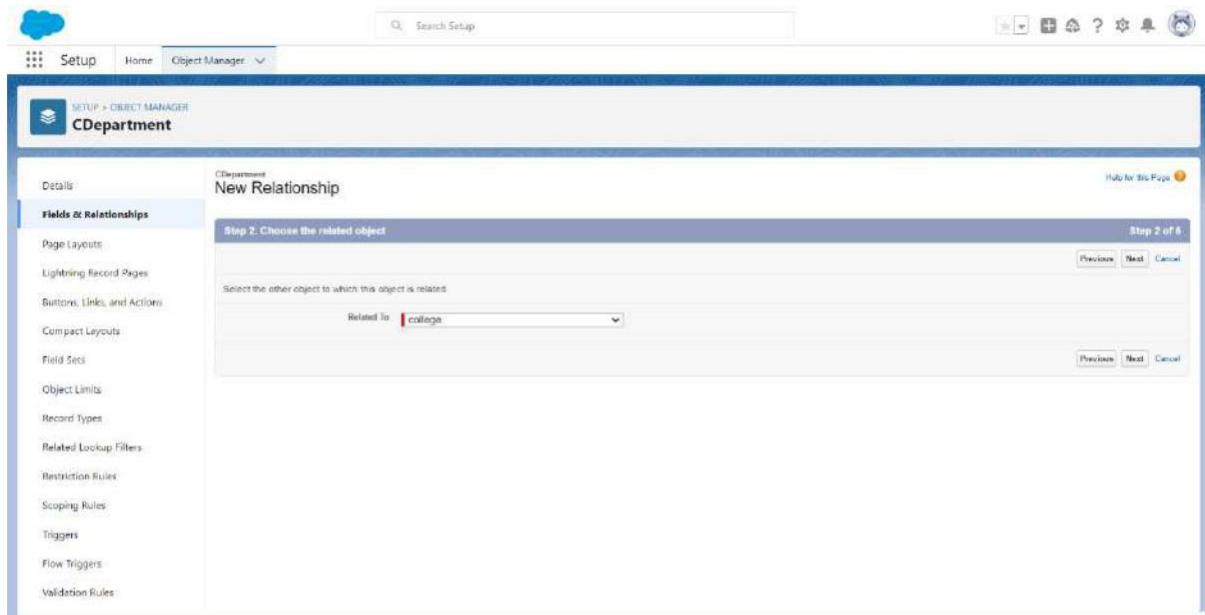
Allow re-parenting:

Child records can be re-parented 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



Step 3: Create the Roll-Up Summary Field

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

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

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

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

- Setup Home:** The user is in the Object Manager section under the CDepartment object.
- Fields & Relationships:** This is the active tab, showing a table of fields for the CDepartment object.
- Table Headers:** The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED.
- Table Data:**

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
college	college__c	Master-Detail(college)		✓
Created By	CreatedById	Lookup(User)		
Department Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
- Left Sidebar:** A sidebar on the left lists various setup categories such as Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, Scoping Rules, Triggers, Flow Triggers, and Validation Rules.

Setup Home Object Manager

SETUP Tabs

Custom Tabs

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

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Custom Object Tabs

Action	Label	Tab Style	Description
Edit Del	Book1	Box	
Edit Del	Research_Proposal	Square	
Edit Del	student	Icon	

Web Tabs

No Web Tabs have been defined.

Visualforce Tabs

No Visualforce Tabs have been defined.

Lightning Component Tabs

No Lightning component tabs have been defined.

Lightning Page Tabs

No Lightning Page Tabs have been defined.

Help for this Page

Setup Home Object Manager

SETUP > OBJECT MANAGER college

Details

Fields & Relationships

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

New Custom Field

Step 5: Add to page layouts Step 5 of 5

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

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

Add Field Page Layout Name college Layout

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

Previous Save & New Save Cancel

Setup | **Home** | **Object Manager** | **college**

New Custom Field

Step 4. Establish field-level security Step 4 of 5

Profile	Write	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cloud Kicks Admin	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contract 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"/>
Customer Support Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Customer	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Forrester - Ann Reservation User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Step 3. Define the summary calculation Step 3 of 5

Select Object to Summarize

Master Object: college
Summarized Object: Departments

Select Roll-Up Type

COUNT
 SUM
 MIN
 MAX

Field to Aggregate: -Territory-

Filter Criteria

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

Setup | Home | Object Manager | college

SETUP > OBJECT MANAGER college

New Custom Field

Step 2. Enter the details Step 2 of 5

Fields & Relationships

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

Field Label: Total count
 Field Name: Total_count
 Description:
 Help Text:

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

Previous Next Cancel

Setup | Home | Object Manager | college

SETUP > OBJECT MANAGER college

New Custom Field

Step 1. Choose the field type Step 1

Fields & Relationships

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

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

Data Type

None Selected Select one of the data types below.

Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

Formula A read-only field that derives its value from a formula expression you define. This formula field is updated when any of the source fields change.

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

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

Master-Detail Relationship Creates a specific type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "Master") where:

- The relationship field is required on all detail records.
- The permission to add and delete a detail record is determined by the master record.
- When a detail record is deleted, the parent record is also deleted.
- You can create related summary fields on the master record to summarize the detail records.

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

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

Next Cancel

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
college Name	Name	Text(100)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User/Group)	Owner	✓

Step 4: Create a Lightning App

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

10. Assign the app to users or profiles.

11. Test the app with the assigned users.

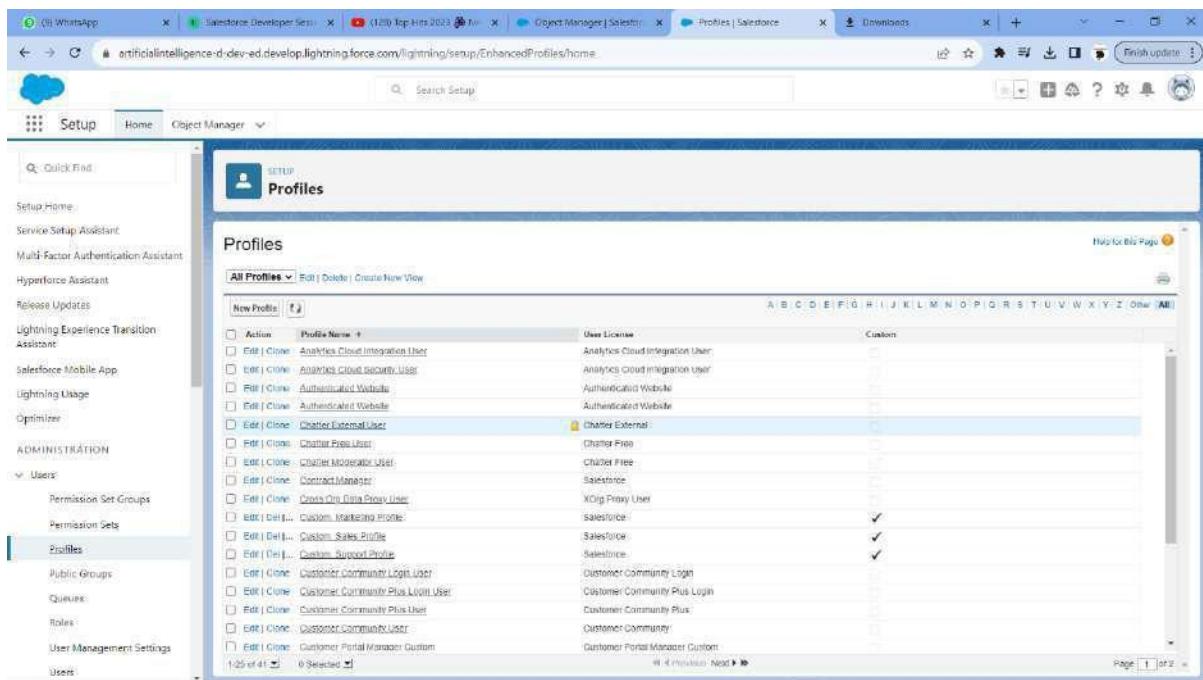
The screenshot shows the Salesforce Setup interface with the 'Tabs' tab selected under 'User Interface'. The main title is 'New Custom Object Tab' and the sub-step is 'Step 2: Add to Profiles'. A note says: 'Choose the user profiles for which the new custom tab will be available. You may also examine 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'. The left column lists various user profiles, and the right column shows their current visibility settings. At the bottom 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
Authorized Website	Default On
CivicXicks 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 User	Default On
Salesforce API Only System Integrations	Default On
Sales User	Default On
Security Profile	Default On
Silver Partner User	Default On
Solution Manager	Default On
Standard Platform User	Default On
Standard User	Default On
System Administrator	Default On

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

Solution:

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



The screenshot shows the Salesforce Setup interface with the 'Profiles' page open. The left sidebar includes links for Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, Administration, Users (with sub-links for Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and Users), and a Help section. The main content area displays a table titled 'Profiles' with columns for 'Action', 'Profile Name', 'User License', and 'Custom'. The table lists various profiles, including 'Analytics Cloud Integration User', 'Analytics Cloud Security User', 'Authenticated Website', 'Authorized Website', 'Chatter External User', 'Chatter Free', 'Customer Manager', 'Salesforce', 'XOrg Proxy User', 'Custom Marketing Profile', 'Custom Sales Profile', 'Custom Support Profile', 'Customer Community Login User', 'Customer Community Plus Login User', 'Customer Community Plus User', 'Customer Community User', and 'Customer Portal Manager Custom'. The 'Custom' column shows checkboxes for some profiles, indicating they are custom profiles.

Salesforce Developer Session

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

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

Search Setup

Profiles

All Profiles | Edit | Delete | Create New View

New Profile | f

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 | A:

Action	Profile Name	User License	Custos
<input type="checkbox"/> Edit Clone	Salesforce API Only System Integrator	Salesforce Integration	
<input type="checkbox"/> Edit Delete	SalesManager	Salesforce	
<input type="checkbox"/> Edit Clone	Basic Platform User	Silver Partner	
<input type="checkbox"/> Edit Clone	Business 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	

1 of 7 | 0 Selected | Page 1 of 1

Salesforce Developer Session

artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page/address=%2F%2Fperm%2F%2Fprofile%2FprofileClone%2F%2F...

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

Search Setup

Profiles

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

Existing Profile: Standard Platform User

User License: Salesforce Platform

Profile Name:

Save Cancel

Salesforce Developer Series | Top Hits 2023 | Object Manager | Salesforce | Profiles | Salesforce | Downloads

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

Profiles

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

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

Save Cancel

Salesforce Developer Series | Top Hits 2023 | Object Manager | Salesforce | Profiles | Salesforce | Downloads

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

Profiles

Manager

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

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

LuLo IP Range(s) | Enabled Apex Class Access (0) | Enabled Visualforce Page Access (0) | Enabled Patient Data Source Access (0) | Enabled Shared Credential Access (0) | Enabled Patient Credential Prerequisite Access (0) | Enabled Custom Metadata Type Access (0) | Enabled Custom Object Definition Access (0) | Enabled File Access (0) | Enabled Session Protection Status Access (0) | Enabled Custom Permissions (0)

Profile Detail

Name	Manager	Custom Profile	
User License	Salesforce Platform	<input checked="" type="checkbox"/>	
Description			
Created By	GOPAL_E 01/10/2020, 7:00 pm	Modified By	GOPAL_E 01/10/2020, 7:00 pm

Page Layouts

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

Salesforce Developer Setup

Profiles | Salesforce

Manager

Set the permissions and page layouts for this profile.

Profile Edit

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

Custom App Settings

App	Visible	Default
Analytics Studio (standard__Analytics)	<input type="checkbox"/>	<input type="radio"/>
App Launcher (standard__AppLauncher)	<input type="checkbox"/>	<input type="radio"/>
Kin (test)	<input checked="" type="checkbox"/>	<input type="radio"/>
Platform (standard__Platform)	<input type="checkbox"/>	<input checked="" type="radio"/>
WDC (standard__Work)	<input type="checkbox"/>	<input type="radio"/>

Service Provider Access

Tab Settings

Overwrite users' personal tab customizations

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

Communication Subscription Channel Types

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

Custom Object Permissions

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

Session Settings

Session Timeout After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

User password expires in: 60 days

Enforce password history: 3 passwords remembered

Minimum password length: 6

Salesforce Developer Setup

Profiles | Salesforce

Manager

Set the permissions and page layouts for this profile.

Profile Edit

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

Custom App Settings

App	Visible	Default
Analytics Studio (standard__Analytics)	<input type="checkbox"/>	<input type="radio"/>
App Launcher (standard__AppLauncher)	<input type="checkbox"/>	<input type="radio"/>
Kin (test)	<input checked="" type="checkbox"/>	<input type="radio"/>
Platform (standard__Platform)	<input type="checkbox"/>	<input checked="" type="radio"/>
WDC (standard__Work)	<input type="checkbox"/>	<input type="radio"/>

Service Provider Access

Tab Settings

Overwrite users' personal tab customizations

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

Communication Subscription Channel Types

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

Custom Object Permissions

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

Session Settings

Session Timeout After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

User password expires in: 60 days

Enforce password history: 3 passwords remembered

Minimum password length: 6

Salesforce Developer Setup | Object Manager | Salesforce | Profiles | Salesforce | Downloads | Refresh 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

Custom Object Permissions

	Bank					customers					Enhancement Requests				
	Basic Access	Create	Edit	Delete	View All	Modify All		Basic Access	Create	Edit	Delete	View All	Modify All		
Contact Point Addresses	<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>											
Contact Point Consents	<input type="checkbox"/>		<input checked="" type="checkbox"/>												
Contact Point Emails	<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>											
Sellers	<input checked="" type="checkbox"/>		<input type="checkbox"/>												
Streaming Channels	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>												
User External Credentials	<input type="checkbox"/>		<input type="checkbox"/>												

Session Settings

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

Custom Object Permissions

	Bank					customers					Enhancement Requests				
	Basic Access	Create	Edit	Delete	View All	Modify All		Basic Access	Create	Edit	Delete	View All	Modify All		
Contact Point Addresses	<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>											
Contact Point Consents	<input type="checkbox"/>		<input checked="" type="checkbox"/>												
Contact Point Emails	<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>											
Sellers	<input checked="" type="checkbox"/>		<input type="checkbox"/>												
Streaming Channels	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>												
User External Credentials	<input type="checkbox"/>		<input type="checkbox"/>												

Session Settings

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

Custom Object Permissions

	Bank					customers					Enhancement Requests				
	Basic Access	Create	Edit	Delete	View All	Modify All		Basic Access	Create	Edit	Delete	View All	Modify All		
Contact Point Addresses	<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>											
Contact Point Consents	<input type="checkbox"/>		<input checked="" type="checkbox"/>												
Contact Point Emails	<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>											
Sellers	<input checked="" type="checkbox"/>		<input type="checkbox"/>												
Streaming Channels	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>												
User External Credentials	<input type="checkbox"/>		<input type="checkbox"/>												

Session Settings

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

Custom Object Permissions

	Bank					customers					Enhancement Requests				
	Basic Access	Create	Edit	Delete	View All	Modify All		Basic Access	Create	Edit	Delete	View All	Modify All		
Contact Point Addresses	<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>											
Contact Point Consents	<input type="checkbox"/>		<input checked="" type="checkbox"/>												
Contact Point Emails	<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>											
Sellers	<input checked="" type="checkbox"/>		<input type="checkbox"/>												
Streaming Channels	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>												
User External Credentials	<input type="checkbox"/>		<input type="checkbox"/>												

Session Settings

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

Salesforce Developer Setup | Object Manager | Salesforce | Profiles | Salesforce | Downloads | Refresh 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

Custom Object Permissions

	Bank					customers					Enhancement Requests				
	Basic Access	Create	Edit	Delete	View All	Modify All		Basic Access	Create	Edit	Delete	View All	Modify All		
Contact Point Addresses	<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>											
Contact Point Consents	<input type="checkbox"/>		<input checked="" type="checkbox"/>												
Contact Point Emails	<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>											
Sellers	<input checked="" type="checkbox"/>		<input type="checkbox"/>												
Streaming Channels	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>												
User External Credentials	<input type="checkbox"/>		<input type="checkbox"/>												

Session Settings

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

Custom Object Permissions

	Bank					customers					Enhancement Requests				
	Basic Access	Create	Edit	Delete	View All	Modify All		Basic Access	Create	Edit	Delete	View All	Modify All		
Contact Point Addresses	<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>											
Contact Point Consents	<input type="checkbox"/>		<input checked="" type="checkbox"/>												
Contact Point Emails	<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>											
Sellers	<input checked="" type="checkbox"/>		<input type="checkbox"/>												
Streaming Channels	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>												
User External Credentials	<input type="checkbox"/>		<input type="checkbox"/>												

Session Settings

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

Custom Object Permissions

	Bank					customers					Enhancement Requests				
	Basic Access	Create	Edit	Delete	View All	Modify All		Basic Access	Create	Edit	Delete	View All	Modify All		
Contact Point Addresses	<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>											
Contact Point Consents	<input type="checkbox"/>		<input checked="" type="checkbox"/>												
Contact Point Emails	<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>											
Sellers	<input checked="" type="checkbox"/>		<input type="checkbox"/>												
Streaming Channels	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>												
User External Credentials	<input type="checkbox"/>		<input type="checkbox"/>												

Session Settings

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

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

Profiles

Custom Object Permissions

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

Session Settings

Session Timeout 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 answers for prevent reuse:
- Requires a minimum 1 day password lifetime:
- Don't immediately expire links in forgot password emails:

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

Users

All Users

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

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

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

Action	Last Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Adriana	adriana	test_adriana_1@sfdev001.apigee.net	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	IPM User
<input type="checkbox"/>	Chatter	Chatter	chatter-005900000b0000000000000000000000@chatter.salesforce.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	Elton	elton	elton.elton.1@00cp0000000000000000000000000000@salesforce.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	GQRN	gqrn	testgqrn2@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	User Integration	integ	integration-000d500000000000@cakestab.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	User Security	sec	integrationsecurity@000d500000000000@cakestab.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Security User

Salesforce Developer Session - artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005%2Fe%3FretURL%3D%252F005%253FitUserEntityOv... | Finish update

Users

New User

User Edit Save Save & New Cancel

General Information

First Name: <input type="text"/>	Last Name: <input type="text"/>	Role: <input type="text"/> <None Specified>
Alias: <input type="text"/>	Email: <input type="text"/>	User License: <input type="text"/> Salesforce Integration
Username: <input type="text"/>	Nickname: <input type="text"/>	Profile: <input type="text"/> Salesforce API Only System Integrations
Title: <input type="text"/>	Company: <input type="text"/>	Active: <input checked="" type="checkbox"/>
Department: <input type="text"/>	Division: <input type="text"/>	Marketing User: <input type="checkbox"/>
Office User: <input type="checkbox"/>		
Knowledge User: <input type="checkbox"/>		
File User: <input type="checkbox"/>		
Service Cloud User: <input type="checkbox"/>		
Site.com Contributor User: <input type="checkbox"/>		
Site.com Publisher User: <input type="checkbox"/>		
WDC User: <input type="checkbox"/>		
Data.com User Type: <input type="text"/> -None-		
Data.com Monthly Addition Limit: <input type="text"/> (Default Limit: 0)		
Accessibility Mode (Classic Only): <input type="checkbox"/>		
High Contrast Palette on Charts: <input type="checkbox"/>		
Load Lightning Pages While Scrolling: <input checked="" type="checkbox"/>		
Debug Mode: <input type="checkbox"/>		

Help for this Page

Salesforce Developer Session - artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005%2Fe%3FretURL%3D%252F005%253FitUserEntityOv... | Finish update

Users

New User

User Edit Save Save & New Cancel

General Information

First Name: <input type="text"/> sowmya	Last Name: <input type="text"/> bala	Role: <input type="text"/> <None Specified>
Alias: <input type="text"/> sba	Email: <input type="text"/> 2k20cse179@kot.ac.in	User License: <input type="text"/> Salesforce Platform
Username: <input type="text"/> 2k21me16771282564528	Nickname: <input type="text"/> User169616771282564528	Profile: <input type="text"/> Manager
Title: <input type="text"/> worker	Company: <input type="text"/> kot bark	Active: <input checked="" type="checkbox"/>
Department: <input type="text"/>	Division: <input type="text"/>	Marketing User: <input type="checkbox"/>
Office User: <input type="checkbox"/>		
Knowledge User: <input type="checkbox"/>		
File User: <input type="checkbox"/>		
Service Cloud User: <input type="checkbox"/>		
Site.com Contributor User: <input type="checkbox"/>		
Site.com Publisher User: <input type="checkbox"/>		
WDC User: <input type="checkbox"/>		
Data.com User Type: <input type="text"/> -None-		
Data.com Monthly Addition Limit: <input type="text"/> (Default Limit: 0)		
Accessibility Mode (Classic Only): <input type="checkbox"/>		
High Contrast Palette on Charts: <input type="checkbox"/>		
Load Lightning Pages While Scrolling: <input checked="" type="checkbox"/>		
Debug Mode: <input type="checkbox"/>		

Help for this Page

The screenshot displays two browser windows side-by-side.

Top Window (Salesforce Setup):

- URL:** artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005j00000A4UoC%3FnoRedirect%3D1%26isUserEntityO...
- Page:** Users - Setup
- User Details:** Name: sowmya bala, Alias: sthak, Email: 2k21@klot.ac.in, Nickname: User16961677122206-02616, Title: WORKER, Company: klot bank, Department: Division, Address: , Time Zone: (GMT+01:30) India Standard Time (Asia/Kolkata), Locale: English (India), Language: English, Delegated Approver: Manager, Receive Approval Request Emails: Only if I am an approver, Federation ID: App Registration: One-Time Password Authentication, App Registration: Salesforce Authentication.
- Role:** User License: Salesforce Platform Profile: Manager, Active: checked, Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Mobile Push Registrations: 0/250, Data.com User Type: , Accessibility Mode (Classic Only): , Deleting Mode: , High-Contrast Pallete on Charts: , Load Lightning Pages While Scrolling: checked, Salesforce CRM Content User: checked.

Bottom Window (Gmail):

- URL:** mail.google.com/mail/u/0/#inbox?MflngGtSbIsqKRLzCQHbDnRQxWf
- Inbox:** 5,318 messages.
- Message Preview:** From: support@salesforce.com (support@salesforce.com) To: me. Subject: Welcome to Salesforce! Click below to verify your account. Verify Account. To easily log in later, save this URL: https://artificialintelligence-d-dev-ed.lightning.force.com/. Username: 2k21@klot.ac.in Again, welcome to 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

saloni

Change Password

Password was last changed on 01/29/2023, 7:22 pm

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 | Salesforce

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

MECW

meow Bank customers Home

Bank 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

artificialintelligence-d-dev-ed-develop.lightning.force.com/lightning/o/Bank__c/new?count=1&nooverride=true&recordTypeCheck=true&navigationLocation=LIST_VIEW&wid=10...

meow Bank customers Home

Bank Recently Viewed

0 items • Updated a few seconds ago

Bank Name

New Bank

* Bank Name: bei

Owner: sowmiya bala

Phone No: 0897754534

Cancel Save & New Save

The image displays two screenshots of the Salesforce Lightning interface, illustrating the creation and viewing of a customer record.

Top Screenshot (New customer):

- Page Title:** New customer | Salesforce
- URL:** artificialintelligence-d-dev-ed.lightning.force.com/lightning/c/customer__c/new?count=2&mcovrde=1&useRecordTypeCheck=1&navigationLocation=LIST_VIEW&ui...
- Content:** A modal window titled "New customer" is open, showing the "Information" section. It contains two required fields:
 - *customer Name: madhu
 - *Bank: boi
- Buttons:** Cancel, Save & New, Save

Bottom Screenshot (Customer Detail View):

- Page Title:** madhu | customer | Salesforce
- URL:** artificialintelligence-d-dev-ed.lightning.force.com/lightning/c/customer__c/a02500000CV5AAM/view
- Content:** The customer record for "madhu" is displayed in the "Details" tab. The record shows:
 - customer Name: madhu
 - Bank: boi
 - Created By: soumya bala, 01/10/2023, 7:17 pm
 - Last Modified By: soumya bala, 01/10/2023, 7:17 pm
- Buttons:** New Contact, Edit, Delete

Salesforce Developer Session 2 | D365 Top Hits 2023 | New Page | Profiles | Salesforce | Welcome to Salesforce Verify | Refresh update

Setup Home Object Manager Search Setup

Profiles

All Profiles | Edit | Delete | Create New View

Action	Profile Name	User License	Custos
<input type="checkbox"/> Edit Clone	Salesforce API Only System Integrator	Salesforce Integration	
<input type="checkbox"/> Edit Delete	salesmanager	Salesforce	
<input type="checkbox"/> Edit Clone	Basic Platform User	Silver Partner	
<input type="checkbox"/> Edit Clone	Business 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	

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

1 of 2 Selected 41 Revision Since 10 Page 1 of 1

10:41:49 AM 10/25/2023

Salesforce Developer Session 2 | D365 Top Hits 2023 | New Page | Profiles | Salesforce | Welcome to Salesforce Verify | Refresh update

Setup Home Object Manager Search Setup

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: salesmanaged

Save Cancel

Required Information

10:41:49 AM 10/25/2023

Salesforce Developer Session 2 | D2L: Top Hits 2022 | New Proj | Profiles | Salesforce | Welcome to Salesforce: Verify | +

Setup Home Object Manager Search Setup

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.

Layouts [Edit] Enabled Record Access [] Enabled Visualforce Page Access [] Enabled External Data Source Access [] Enabled Shared Credential Access [] Enabled Enhanced Credential Principal Access [] Enabled Enhanced Credential Principal Access [] Enabled Custom Metadata Type Access [] Enabled Custom Setting Definitions Access [] Enabled File Access [] Enabled SObject Progress Status Access [] Enabled Custom Permissions []

Profile Detail

Name: salesmanage	User License: Salesforce Platform	Custom Profile: <input checked="" type="checkbox"/>
Description:	Created By: QOBAL S. 01/10/2023, 7:10 pm	Modified By: QOBAL S. 01/10/2023, 7:10 pm

Page Layouts

standard Object Layouts

Global	QOBAL S. [View Assignment]	Operating Hours	Describing Hours [View Assignment]
Email Application	Not Assigned [View Assignment]	Order	Open Layout [View Assignment]
Home Page Layout	Home Page Default [View Assignment]	Order Product	Order Product Layout [View Assignment]
Account	Account Layout [View Assignment]	Payment	Payment Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	Payment Authorization	Payment Authorization Layout [View Assignment]
Appointment Invitations	Appointment Invitations Layout [View Assignment]	Payment Authorization Adjustment	Payment Authorization Adjustment Layout [View Assignment]
Asset	Asset Layout [View Assignment]	Payment Gateway	Payment Gateway Layout [View Assignment]

Help for this Page

Salesforce Developer Session 2 | D2L: Top Hits 2022 | New Proj | Profiles | Salesforce | Welcome to Salesforce: Verify | +

Setup Home Object Manager Search Setup

Profiles

Profile Edit

Profile salesmanage

Set the permissions and page layouts for this profile.

Profile Edit

Name: salesmanage	Save Save & New Cancel
User License: Salesforce Platform	Custom Profile: <input checked="" type="checkbox"/>
Description:	

Custom App Settings

Analytics Studio (standard_Analytics)	Visible: <input type="checkbox"/>	Default: <input checked="" type="radio"/>	Platform (standard_Platform)	Visible: <input checked="" type="checkbox"/>	Default: <input checked="" type="radio"/>
App Launcher (standard_AppLauncher)	Visible: <input type="checkbox"/>	Default: <input checked="" type="radio"/>	WDC (standard_WDC)	Visible: <input type="checkbox"/>	Default: <input checked="" type="radio"/>
Info (Info)	Visible: <input checked="" type="checkbox"/>	Default: <input type="radio"/>			

Service Provider Access

Tab Settings

Overwrite user's personal tab customizations:

Standard Tab Settings

Home	Default On	Leaving	Default On
Accounts	<input type="radio"/>	Leaving	<input checked="" type="radio"/>

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

Setup Home Object Manager

Quick Find Search Setup

Profiles

Custom Object Permissions

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

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"/>

Enhancement Requests

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

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

Setup Home Object Manager

Quick Find Search Setup

Profiles

Custom Object Permissions

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

Enhancement Requests

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

Save Save & New Cancel

Salesforce Developer Session 2 | D2B Top Hits 2022 | New Page | Users | Salesforce | Welcome to Salesforce Verify | +

Setup Home Object Manager

Q user

v **Users**

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

Search Setup

Users

New User

User Edit Save Save & New Cancel

General Information

First Name	madhu
Last Name	b
Alias	mb
Email	2k20cae179@kotl.ec.in
Username	2k20cae179@kotl.ac.in
Nickname	User18961684240654192
Title	worker
Company	kotl bark
Department	Sales
Division	

Role <None Specified> User License Salesforce Integration Profile Salesforce API Only System Integrations Active Marketing User Office User Knowledge User File User Service Cloud User Site.com Contributor User Site.com Publisher User WDC User Datacom User Type -None- Datacom Monthly Addition Limit (Default Limit 1000) Accessibility Mode (Classic Only) High Contrast Palette on Charts Load Lightning Pages While Scrolling Debug Mode

Help for this Page

Salesforce Developer Session 2 | D2B Top Hits 2022 | New Page | Users | Salesforce | Welcome to Salesforce Verify | +

Setup Home Object Manager

Q user

v **Users**

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

Search Setup

Users

New User

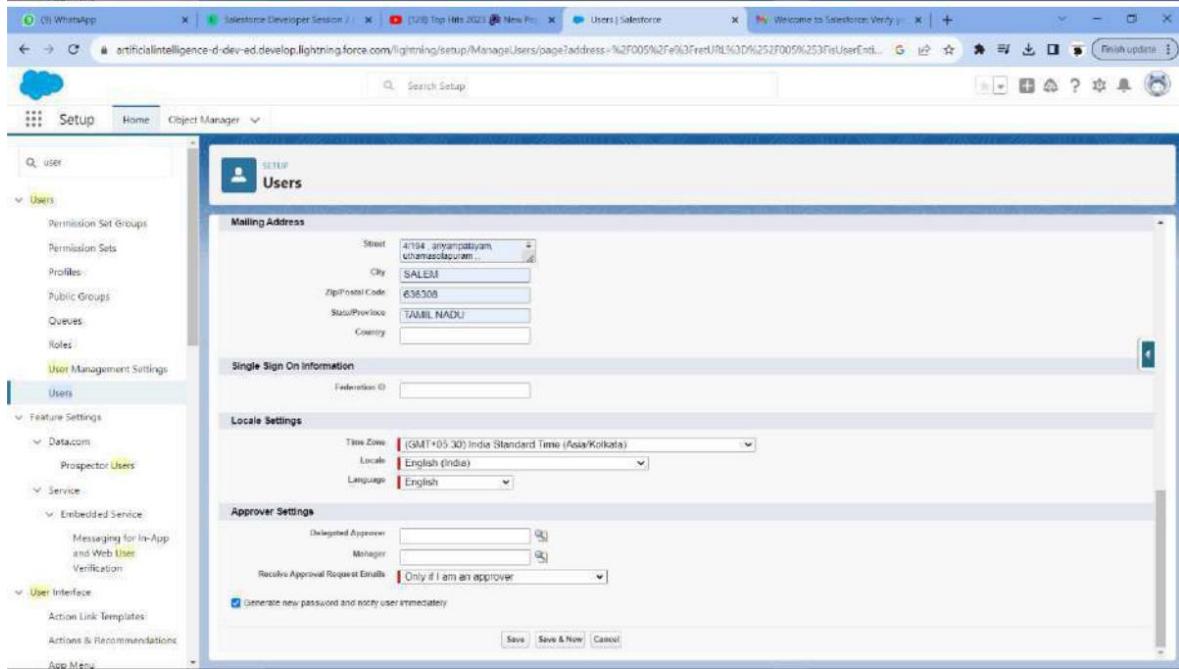
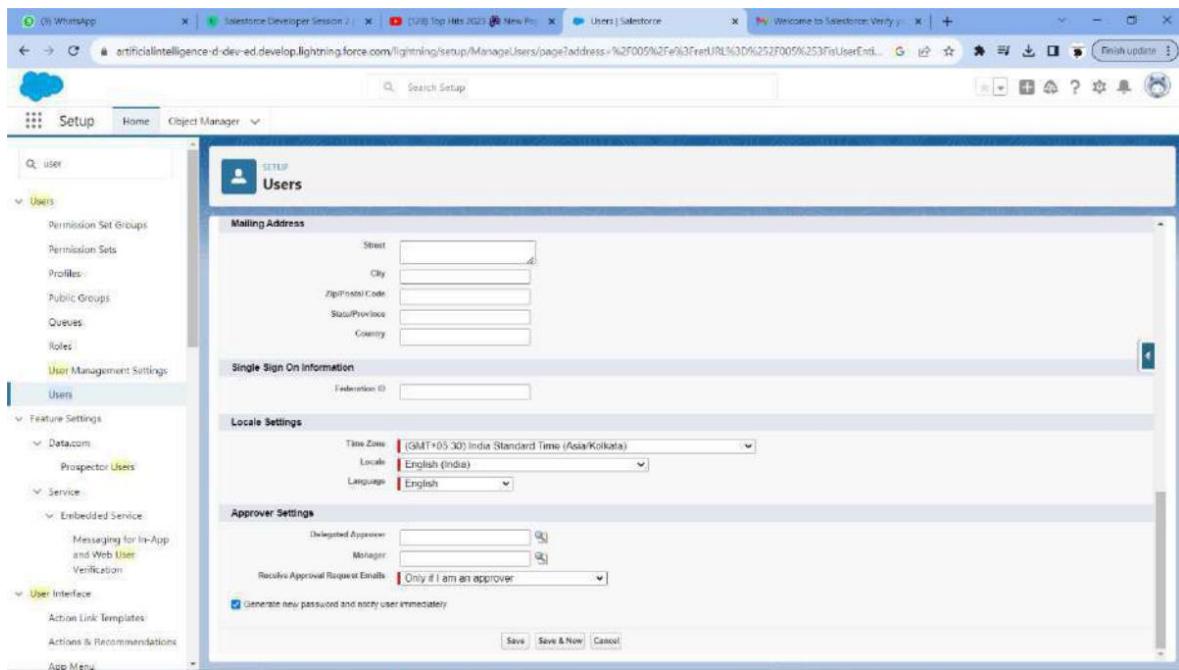
User Edit Save Save & New Cancel

General Information

First Name	madhu
Last Name	b
Alias	mb
Email	2k20cae179@kotl.ec.in
Username	2k20cae179@kotl.ac.in
Nickname	User18961684240654192
Title	worker
Company	kotl bark
Department	Sales
Division	

Role <None Specified> User License Salesforce Platform Profile salesmanager Active Marketing User Office User Knowledge User File User Service Cloud User Site.com Contributor User Site.com Publisher User WDC User Datacom User Type -None- Datacom Monthly Addition Limit (Default Limit 1000) Accessibility Mode (Classic Only) High Contrast Palette on Charts Load Lightning Pages While Scrolling Debug Mode

Help for this Page



The image displays two browser windows side-by-side.

Top Window (Salesforce Developer Session):

- URL:** <https://artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005%2F0000A4UV%3Bnoredirect%3D1%26UserCn...>
- Page:** Users | Salesforce
- Content:** The page shows user details for "madhu b".
 - User Detail:** Name: madhu b, Alias: mb, Email: 2k20csit25@kcl.ac.in, Username: 2k20csit25@kcl.ac.in, Nickname: User16991684242005115206, Title: WORKER, Company: kcl.kcl.ac.in, Department: Itales, Division: Address: 67/1A, Anna Nagar, Uthamalapuram, Parakala, Salem- 636008, State: Tamil Nadu, Time Zone: (GMT +03:00) India Standard Time (Asia/Kolkata), Locale: English (India), Language: English, Delegated Approvals: Manager: Only I am an approver, Federation ID: App Registrations: One-Time Password Authentication.
 - Role:** User License: Salesforce Platform Profile: salesforceplatform, Active: checked, Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Commerce User.
 - Mobile Push Registrations:** Device Type: View.
 - Accessibility Mode:** Classic Only, Debug Mode, High-Contrast Palettes on Charts, Load Lightning Pages With Scrolling.

Bottom Window (Gmail):

- URL:** <https://mail.google.com/mail/u/0/#inbox/MfogzGtGfOsqXKLzCGhbDnOckv>
- Page:** Welcome to Salesforce!
- Content:** A welcome message from Salesforce.
 - Click below to verify your account.
 - Verify Account** button.
 - To easily log in later, save this URL:
<https://artificialintelligence-d-dev-ed.lightning.force.com>
 - Username: 2k20csit25@kcl.ac.in
 - Again, welcome to Salesforce!

Change Your Password | Salesforce

artificialintelligence-d-dev-ed-develop.my.salesforce.com/_ui/system/security/ChangePassword.jsp?fromFrontdoor=1&setupid=ChangePa... Incognito Finish update



Change Your Password

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

- 8 characters
- 1 letter
- 1 number

* New Password:
.....
Code

* Confirm New Password:
.....
M0m

Security Question:
In what city were you born?

* Answer:
India

Change Password

Password was last changed on 01/30/2023, 7:24 pm.

Recently Viewed | Bank | Salesforce

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

MECW

meow Bank customers Home

Bank Recently Viewed

0 items • Updated a few seconds ago

Bank Name

New

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

List View

Recently Viewed | customers | +

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

MECW

meow Bank customers Home

Search...

customer Name

Recently Viewed

0 items • Updated a few seconds ago

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

List View

01 WhistleApp Salesforce Developer Studio Top Hits 2023 Permission Sets SalesForce Welcome to Salesforce! Reset Password Selector

Search Setup

Setup Home Object Manager

Q user

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](#) [Create new View](#)

Action	Permission Set Label	Description	Users
<input type="checkbox"/> Delete	Access to activity	Allows access to the store. Lets users see products and categories... Includes all Buyer capabilities, and allows access to manage carts an...	BBG Buyer Permission Set One Seat
<input type="checkbox"/> Create	Buyer	Denotes that the user is a sales cloud or service cloud user.	BBG Buyer Manager Permission Set One Seat
<input type="checkbox"/> Create	CRM User	Allows access to commerce admin features.	CRM User
<input type="checkbox"/> Create	Commerce Admin	Manages Service Cloud Voice contact centers that use Amazon Conn...	Commerce Admin Permission Set License Seat
<input type="checkbox"/> Create	Contact Center Admin	Access agent features in Service Cloud Voice contact centers th...	Service Cloud Voice User
<input type="checkbox"/> Create	Contact Center Supervisor	Access supervisor features in Service Cloud Voice contact centers th...	Service Cloud Voice User
<input type="checkbox"/> Create	Expense Profile Manager	Allows users create, read, edit, and delete locations, sublocations, equi...	Salesforce
<input type="checkbox"/> Create	Facility Manager	Give your mobile workers access to the Field Service mobile app. S...	Field Service Mobile
<input type="checkbox"/> Create	FieldServiceMobileUserPermSet	Allows access to commerce merchandising features.	Commerce Merchandise User Permission Set License Seat
<input type="checkbox"/> Create	Merchandise	Read Access to all entities enabled by Order Management	Lightning Order Management User
<input type="checkbox"/> Create	Order Management Agent	Access to all features enabled by Order Management.	Lightning Order Management User
<input type="checkbox"/> Create	Order Management Operations Manager	Limited access to Order Management features for Draft Service	Lightning Order Management User
<input type="checkbox"/> Create	Order Management Shippa		

1-20 of 29 [0 Selected](#) [4 Previous](#) [Next >](#) Page 1 of 2

<https://artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/c/customers/home>

Step 2:

Permission Sets:

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

Object-Level Security:

- In each profile and permission set, set the object-level security for the Account object to "Read" to ensure that both I-Jser A and I-Jser 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 IJser 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 has columns for 'Action', 'Permission Set Label', 'Description', and 'License'. The 'Permission Set Label' column lists various roles such as 'Access to activity', 'Buyer', 'Buyer Manager', 'CRM User', 'Commerce Admin', 'Contact Center Admin', 'Contact Center Agent', 'Contact Center Supervisor', 'Experience Profile Manager', 'Facility Manager', 'Field Service Mobile', 'Merchandiser', 'Order Management Agent', 'Order Management Operations Manager', and 'Order Management Shopper'. The 'Description' column provides a brief overview of the permissions granted by each role. The 'License' column indicates the specific license required for each role, such as 'BBG Buyer Permission Set One Seat', 'BBG Buyer Manager Permission Set One Seat', 'CRM User', 'Commerce Admin Permission Set License Seat', 'Service Cloud Voice User', 'Service Cloud Voice User', 'Service Cloud Voice User', 'Salesforce', 'Facility Manager', 'Field Service Mobile', 'Commerce Merchandiser User Permission Set License Seat', 'Lightning Order Management User', 'Lightning Order Management User', and 'Lightning Order Management User'. The table shows 29 total permission sets, with 10 selected.

Action	Permission Set Label	Description	License
<input type="checkbox"/>	Access to activity	Allows access to the Store. Lets users see products and categories.	BBG Buyer Permission Set One Seat
<input type="checkbox"/>	Buyer	Includes all Buyer capabilities, and allows access to manage carts in the store.	BBG 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	Denotes that the user is a sales cloud or Service Cloud user.	CRM User
<input type="checkbox"/>	Commerce Admin	Allows access to commerce admin features.	Commerce Admin Permission Set License Seat
<input type="checkbox"/>	Contact Center Admin	Manages Service Cloud Voice contact centers that use Amazon Connect.	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Agent	Access agent features in Service Cloud Voice contact centers that use Amazon Connect.	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Supervisor	Access supervisor features in Service Cloud Voice contact centers that use Amazon Connect.	Service Cloud Voice User
<input type="checkbox"/>	Experience Profile Manager	Lets users create, edit, and delete profiles, subprofiles, and profile groups.	Salesforce
<input type="checkbox"/>	Facility Manager	Give your mobile workforce access to the Field Service mobile app.	Facility Manager
<input type="checkbox"/>	Field Service Mobile	Allow access to commerce merchandising features.	Commerce Merchandiser User Permission Set License Seat
<input type="checkbox"/>	Merchandiser	Read access to all entities managed by Order Management.	Lightning Order Management User
<input type="checkbox"/>	Order Management Agent	Access to all features enabled by Order Management.	Lightning Order Management User
<input type="checkbox"/>	Order Management Operations Manager	Unlimited access to Order Management features for Staff Services.	Lightning Order Management User
<input type="checkbox"/>	Order Management Shopper		

Salesforce Developer Session

Permission Sets | Salesforce

artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2Fudid%2FPermissionSet%2FnNewPermissionSet.apexp

Finish update

Setup Home Object Manager

Q user

v Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

v Feature Settings

v Datacom

Prospector Users

v Service

v Embedded Service

Messaging for In-App and Web User Verification

v User Interface

Action Link Templates

Actions & Recommendations

App Menu

SETUP

Permission Sets

Create

Enter permission set information

Label:

API Name:

Description:

Session Activation Required:

Select the type of users who will use this permission set

Who will use this permission set?

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

Not sure what a permission set license is? Learn more here.

Licenses: -None-

Save Cancel

Salesforce Developer Session

Permission Sets | Salesforce

artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2Fudid%2FPermissionSet%2FnNewPermissionSet.apexp

Finish update

Setup Home Object Manager

Q user

v Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

v Feature Settings

v Datacom

Prospector Users

v Service

v Embedded Service

Messaging for In-App and Web User Verification

v User Interface

Action Link Templates

Actions & Recommendations

App Menu

SETUP

Permission Sets

Create

Enter permission set information

Label: salesmanager

API Name: salesmanager

Description:

Session Activation Required:

Select the type of users who will use this permission set

Who will use this permission set?

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

Not sure what a permission set license is? Learn more here.

Licenses: -None-

Save Cancel

Salesforce Developer Session

Permission Sets | Salesforce

Welcome to Salesforce! | Reset Password | Salesforce

Finish update

Setup Home Object Manager

Q Search Setup

User

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Datacom

Prospector Users

Service

Embedded Service

Messaging for In-App and Web User Verification

User Interface

Action Link Templates

Actions & Recommendations

App Menu

Permission Set Overview

Description: salesmanager

API Name: salesmanager

Namespace Prefix: salesmanager

Created By: GLOBAL_S_01/10/2023, 7:29 pm

Session Activation Required: No

Last Modified By: GLOBAL_S_01/10/2023, 7:29 pm

Assigned Apps

Assigned Connected Apps

Object Settings

App Permissions

Apex Class Access

Visualforce Page Access

External Data Source Access

Tab Access

Learn More

Salesforce Developer Session

Permission Sets | Salesforce

Welcome to Salesforce! | Reset Password | Salesforce

Finish update

Setup Home Object Manager

Q Search Setup

User

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Datacom

Prospector Users

Service

Embedded Service

Messaging for In-App and Web User Verification

User Interface

Action Link Templates

Actions & Recommendations

App Menu

Permission Set Overview > Object Settings

Object Settings

Object Name	Object Permissions	Total Fields	Tab Settings
Accounts	No Access	40	—
AI Insights Reasons	No Access	—	—
AI Insights Insights	No Access	—	—
Appointment Scheduling Methods	No Access	27	—
API Anomaly Event Stores	No Access	14	—
Analytics Query Requests	No Access	—	—
Application Usage Assessments	No Access	—	—
Appointment Calendars	No Access	0	—
Appointment Instances	No Access	17	—
Appointment Invitations	—	4	—
Appointment Schedules Assignments	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 Setup

Permission Sets | Salesforce

https://artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2F0P5900000Ph0l%3Fs%3DEntityPermissions%26o%3D...

Setup Home Object Manager

Q user

v Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

v Feature Settings

v Datacom

Prospector **Users**

v Service

v Embedded Service

Messaging for In-App and Web User Verification

v User Interface

Action Link Templates

Actions & Recommendations

https://artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2F0P5900000Ph0l%3Fs%3DEntityPermissions%26o%3D...

Setup Home Object Manager

Q Search Setup

SETUP

Permission Sets

Permission Set salesmanager

Find Settings Close Delete Edit Properties Manage Assignments

Permission Set Overview > Object Settings Bank

Bank

Edit

Tab Settings

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

Object Permissions

Permission Name	Enabled
Read	<input type="checkbox"/>
Create	<input type="checkbox"/>
Edit	<input 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 type="checkbox"/>	<input type="checkbox"/>
Last Modified By	<input type="checkbox"/>	<input type="checkbox"/>

Video Tutorial Help for This Page

Salesforce Developer Setup

Permission Sets | Salesforce

https://artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2F0P5900000Ph0l%3Fs%3DEntityPermissions%26o%3D...

Setup Home Object Manager

Q user

v Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

v Feature Settings

v Datacom

Prospector **Users**

v Service

v Embedded Service

Messaging for In-App and Web User Verification

v User Interface

Action Link Templates

Actions & Recommendations

https://artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2F0P5900000Ph0l%3Fs%3DEntityPermissions%26o%3D...

Setup Home Object Manager

Q Search Setup

SETUP

Permission Sets

Permission Set salesmanager

Find Settings Close Delete Edit Properties Manage Assignments

Permission Set Overview > Object Settings Bank

Bank

Save Cancel

Tab Settings

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

Object Permissions

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

Field Permissions

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

Video Tutorial Help for This Page

Salesforce Developer Setup

Permission Sets | Salesforce

Welcome to Salesforce

Reset Password | Salesforce

Search Setup

Setup Home Object Manager

User

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Datacom

Prospector Users

Service

Embedded Service

Messaging for In-App and Web User Verification

User Interface

Action Link Templates

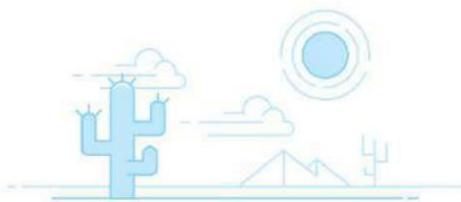
Actions & Recommendations

App Menu

salesmanager

Current Assignments

No assignments defined.



Salesforce Developer Setup

Permission Sets | Salesforce

Welcome to Salesforce

Reset Password | Salesforce

Search Setup

Setup Home Object Manager

User

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Datacom

Prospector Users

Service

Embedded Service

Messaging for In-App and Web User Verification

User Interface

Action Link Templates

Actions & Recommendations

App Menu

All Users

Amelia Ellington

Chatter Expert

Diya Adarna

GOPAL S

Integration User

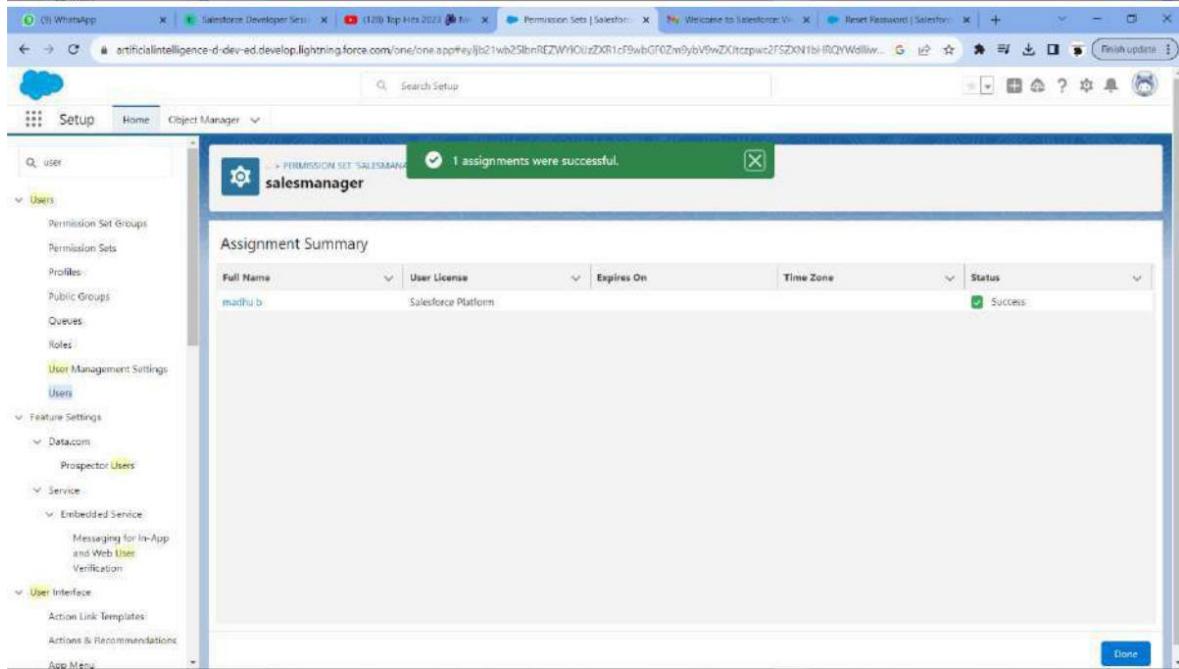
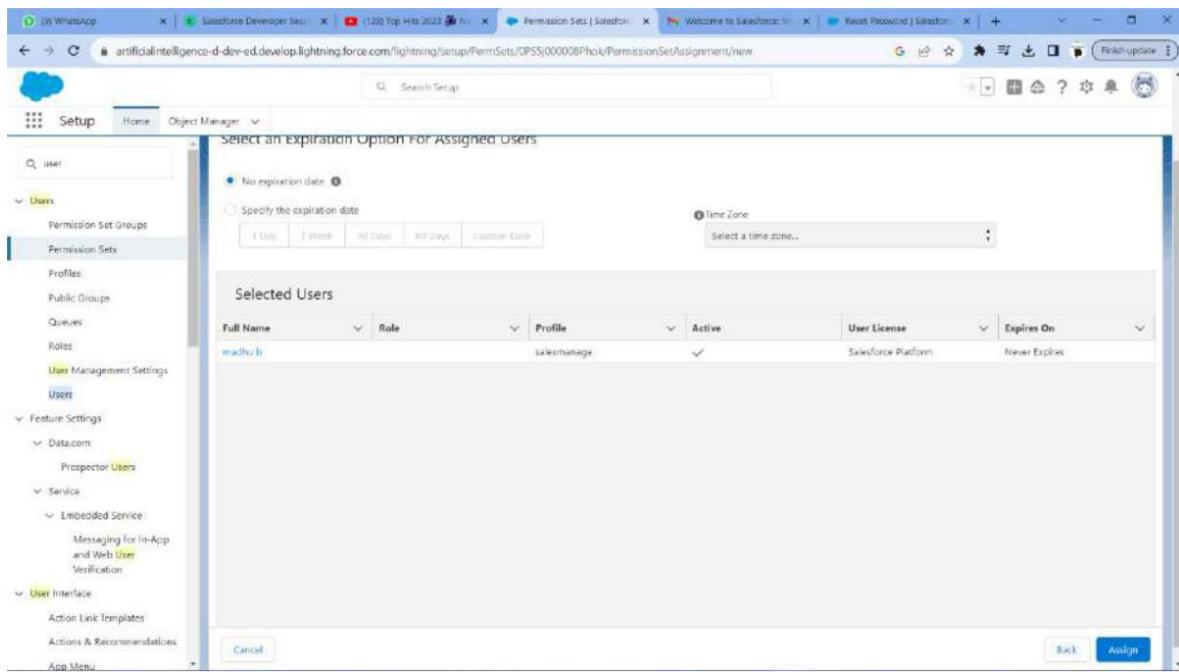
madhu b

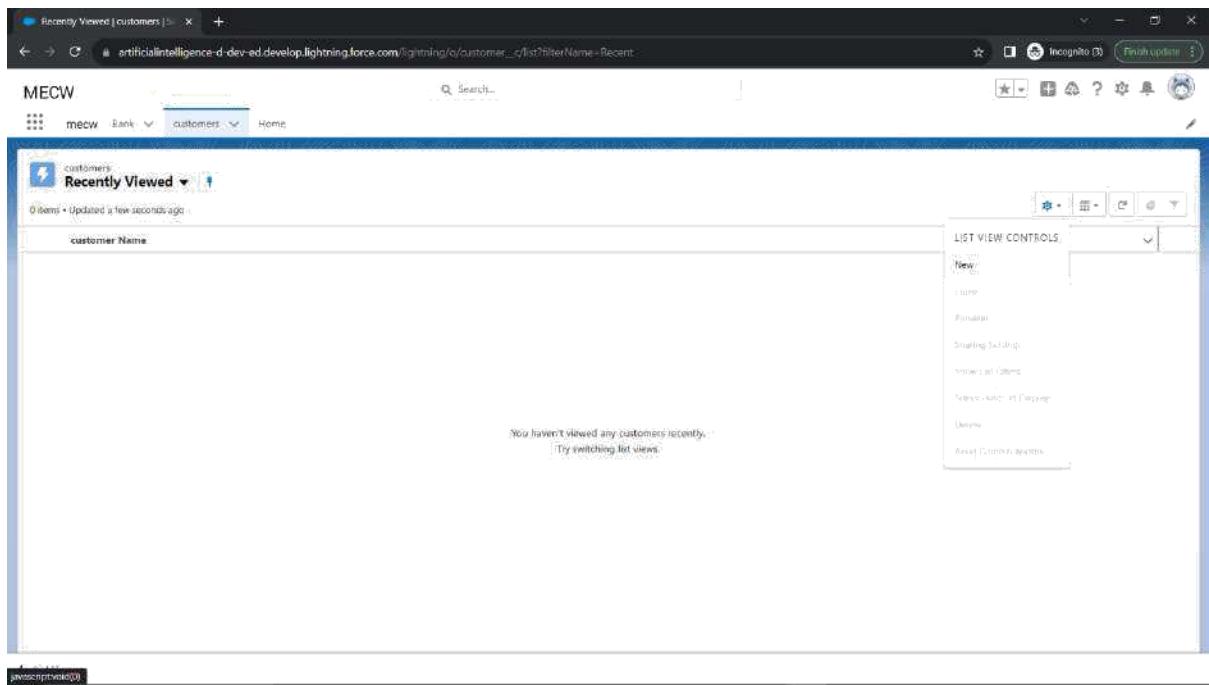
Security User

sevamya bale

Cancel

Next



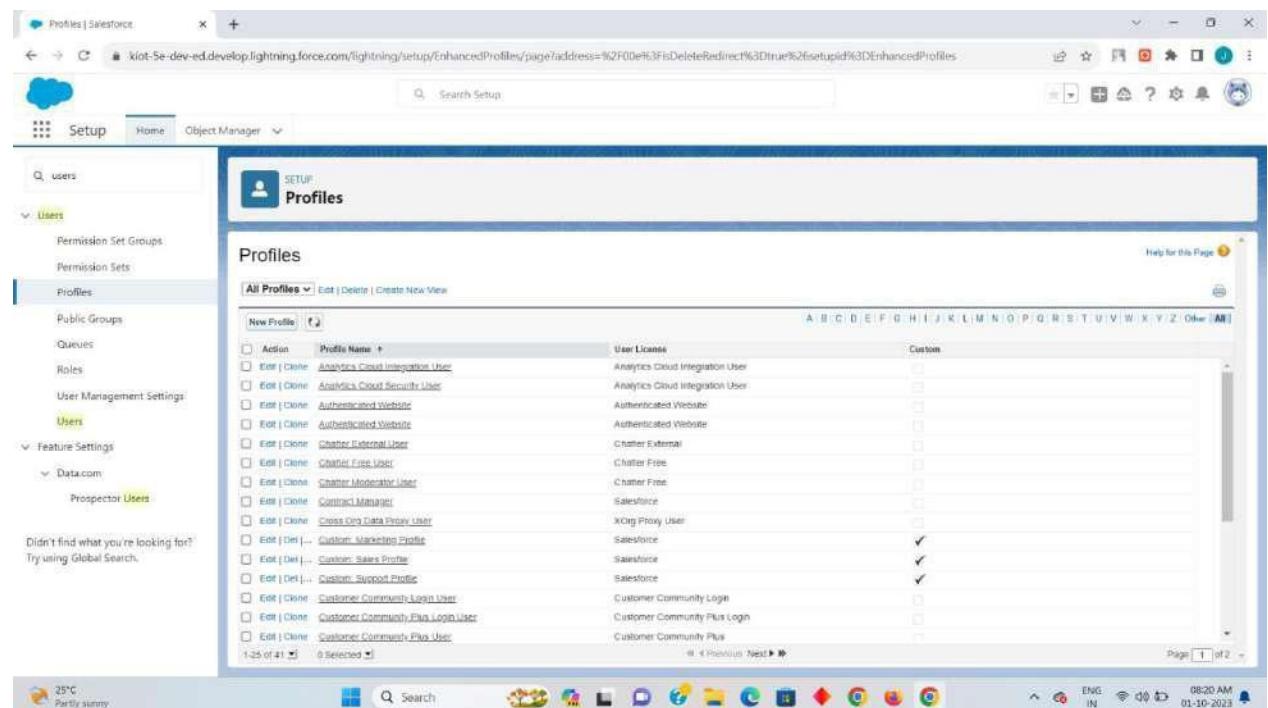


3. . Suppose there are 2 Users and they are having Create, Read, Edit access on Account Object with the same profile but we want to open up the access for one user to delete how will you implement the Security setting.

Solution:

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

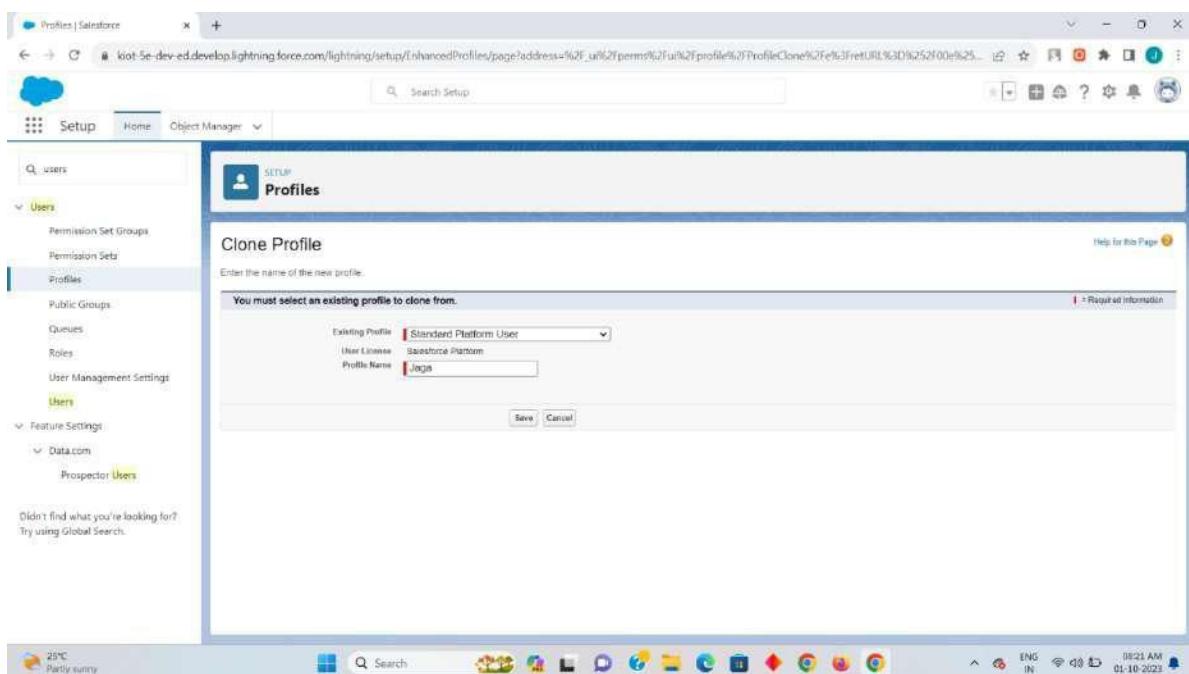
Setup-quick search[profile]



The screenshot shows the Salesforce Setup interface for managing profiles. The left sidebar navigation includes 'Setup' (selected), 'Home', and 'Object Manager'. Under 'Users', 'Profiles' is selected, showing a list of profiles. The main content area displays the 'Profiles' section with a table titled 'All Profiles'. The table columns are 'Action', 'Profile Name', 'User License', and 'Custom'. The 'User License' column lists various user types such as 'Analytics Cloud Integration User', 'Authenticated Website', 'Chatter External', 'Chatter Free', 'Contract Manager', 'Salesforce', 'XOrg Proxy User', 'Salesforce', 'Customer Community Logon User', 'Customer Community Plus Logon', and 'Customer Community Plus'. The 'Custom' column contains checkboxes, many of which are checked. A navigation bar at the bottom indicates 'Page 1 of 2'.

Step 2:

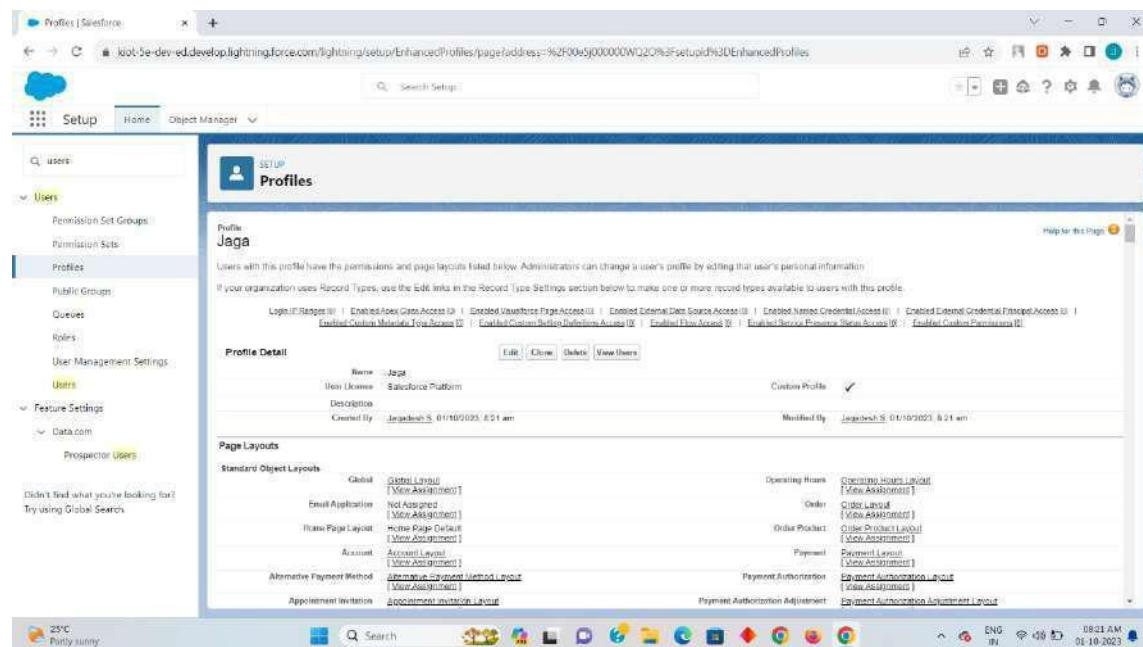
Click on the new to create a new profile along with the label and Api



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

Setup Home Object Manager

Q users

Users

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

Users

- Feature Settings
- Data.com
- Prospector Users

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

25°C Partly sunny

Search Setup

SETUP Profiles

Profile Name: [REDACTED]

Profile Type: [REDACTED]

Object Permissions

Object	Read	Create	Edit	Delete	View All	Modify All
Communication Subscription Contracts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication Subscription Timings	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contacts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Addresses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Contracts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Emails	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Locations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Party Contracts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Push Topics	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sellers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Streaming Channels	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
User External Credentials	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Custom Object Permissions

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

Session Settings

Session Times Out After: 2 hours of inactivity

Enable different Experience Cloud login policies for employees:

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

Session Security Level Required at Login: None

25°C Partly sunny

Search

08:21 AM 01-10-2023

Profiles | Salesforce

Setup Home Object Manager

Q users

Users

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

Users

- Feature Settings
- Data.com
- Prospector Users

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

25°C Partly sunny

Search Setup

SETUP Profiles

Profile Name: [REDACTED]

Profile Type: [REDACTED]

Object Permissions

Object	Read	Create	Edit	Delete	View All	Modify All
Communication Subscription Contracts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication Subscription Timings	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contacts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Addresses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Contracts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Emails	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Locations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Party Contracts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Push Topics	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sellers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Streaming Channels	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
User External Credentials	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Custom Object Permissions

Object	Read	Create	Edit	Delete	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"/>
Resources	<input checked="" type="checkbox"/>					

Session Settings

Session Times Out After: 2 hours of inactivity

Enable different Experience Cloud login policies for employees:

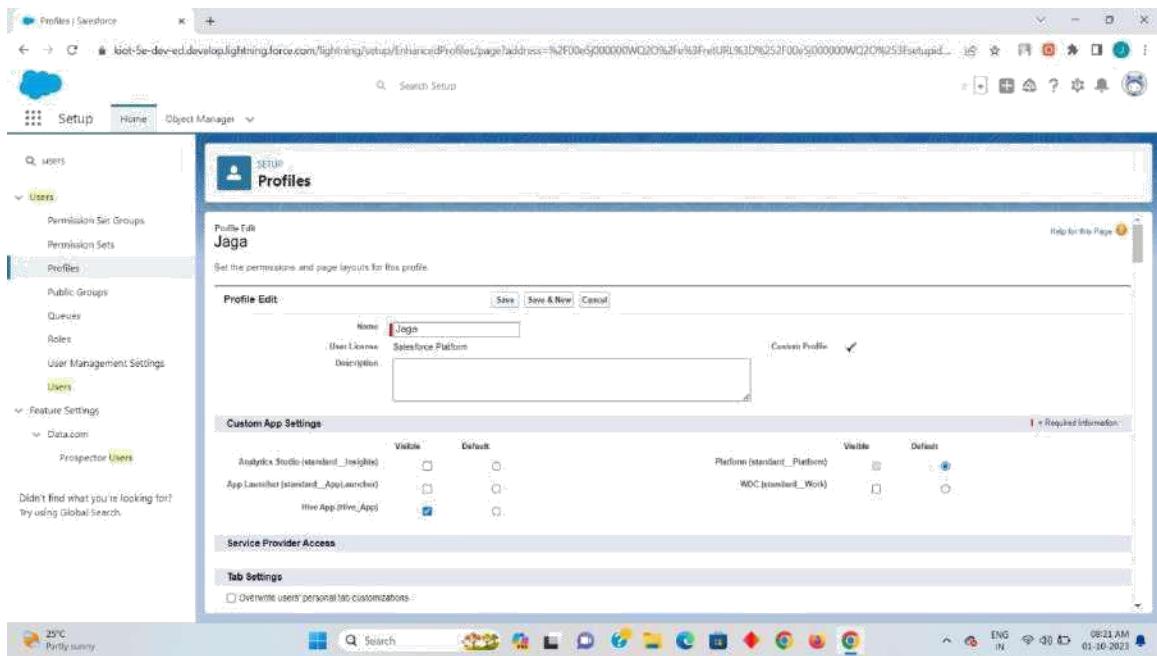
- Separate Experience Cloud site and Salesforce login authentication for employees.
- Role login IP restrictions
- Skip employee device activation during Experience Cloud site login

Session Security Level Required at Login: None

25°C Partly sunny

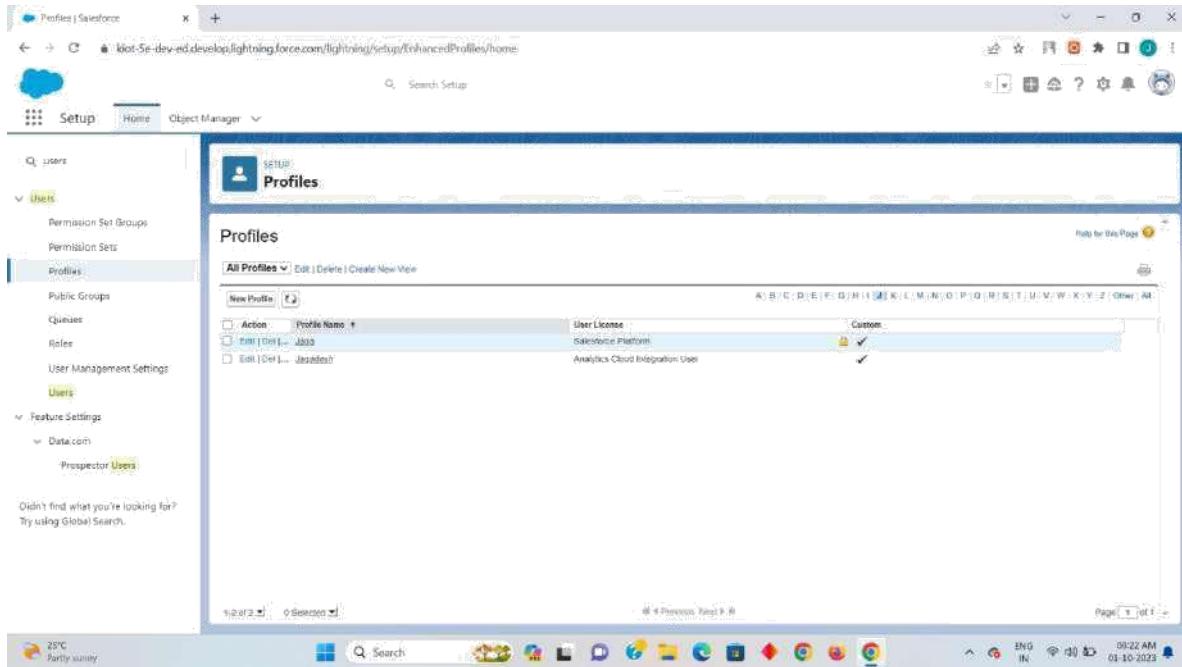
Search

08:21 AM 01-10-2023



Step 4

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



Step 5:

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

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

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Chatter_Excel	Chatter	chatty_005@0000000000000000000000000000000@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	Grey_Jaga	grey	jagc_grey-lightningmain.cz7d2kopt3@gmail.com		<input checked="" type="checkbox"/>	Customer Community User
<input type="checkbox"/>	S_Jaga	js	jagc_js@outlook.com	CEO	<input type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	S_Jagadeesh	js	jagc1117@gmail.com	SP Admin	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	User_Integration	integ	integration00049@0000000000000000000000000000000@ceef2.com	Channel Sales Team	<input checked="" type="checkbox"/>	Analox Cloud Integration User
<input type="checkbox"/>	User_Security	sec	usersecurity@00d9000000000000@ceef2.com		<input checked="" type="checkbox"/>	Analox Cloud Security User

Users | Salesforce

https://dot_SF-dev-ed-dev.lightning.force.com/lightning/setup/ManageUser?pageAddress=%2F005%2Fv%2FvL0%2FD003%2F3F1UserEntity?entityId=005|01n326mtUJL9...

Setup Home Object Manager

Q Users

Users

Provider Set Groups

Permission Sets

Profiles

Public Groups

Quotas

Roles

User Management Settings

Users

Feature Settings

Datacom

Prospectors Users

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

New User

User Edit Save Save & New Cancel

General Information

First Name: Jagadeesh11
Last Name: S
Alias: S
Email: new123@gmail.com
Username: new123@gmail.com
Nickname: User1091207514895299
Title:
Company:
Department:
Division:

Role: Director - Channel Sales
User License: Salesforce Platform
Profile: Admin - Name - Jag
Active: Marketing User
Office User:
Knowledge User:
Flow User:
Service Cloud User:
Business Coordinator User:
Salesforce Publisher User:
WDC User:
Data.com User Type: Admin
Data.com Monthly Address Limit: Default (1000)
Accessibility Mode (Classic Only):
High-Contrast Panels on Charts:

Help for this page

25°C Party sunny

Q Search

ENG IN 08:21 AM 03-10-2023

Users | Salesforce

https://dot_SF-dev-ed-dev.lightning.force.com/lightning/setup/ManageUser?pageAddress=%2F005%2Fv%2FvL0%2FD003%2F3F1UserEntity?entityId=005|01n326mtUJL9...

Setup Home Object Manager

Q Users

Users

Provider Set Groups

Permission Sets

Profiles

Public Groups

Quotas

Roles

User Management Settings

Users

Feature Settings

Datacom

Prospectors Users

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

New User

User Edit Save Save & New Cancel

General Information

First Name: Jagadeesh22
Last Name: S
Alias: S
Email: new1@gmail.com
Username: new1@gmail.com
Nickname: User109120753018743
Title:
Company:
Department:
Division:

Role: Marketing Team
User License: Salesforce Platform
Profile: Admin - Name - Jag
Active: Marketing User
Office User:
Knowledge User:
Flow User:
Service Cloud User:
Business Coordinator User:
Salesforce Publisher User:
WDC User:
Data.com User Type: Admin
Data.com Monthly Address Limit: Default (1000)
Accessibility Mode (Classic Only):
High-Contrast Panels on Charts:

Help for this page

25°C Party sunny

Q Search

ENG IN 08:21 AM 03-10-2023

Users | Salesforce

https://dot_SF-dev-ed-dev.lightning.force.com/lightning/setup/ManageUser?pageAddress=%2F005%2Fv%2FvL0%2FD003%2F3F1UserEntity?entityId=005|01n326mtUJL9...

Setup Home Object Manager

Q Users

Users

Provider Set Groups

Permission Sets

Profiles

Public Groups

Quotas

Roles

User Management Settings

Users

Feature Settings

Datacom

Prospectors Users

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

All Users

On this page you can create, view, and manage users. In addition, download Salesforce1 to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices. Q3 | Andra

View: All Users Edit | Create New User

Action	Full Name	Mo	Username	Role	Action	Profile
<input type="checkbox"/>	test_S_009	S	test09@outlook.com	CEO	<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	test_SubAdmin	S	sub09@outlook.com	SP Admin	<input checked="" type="checkbox"/>	Administrative
<input type="checkbox"/>	test_SubAdmin0	S	sub010@outlook.com	Chair of Sales Team	<input checked="" type="checkbox"/>	Standard Platform User
<input checked="" type="checkbox"/>	test_SubAdmin11	S	sub123@outlook.com	Director - Channel Sales	<input checked="" type="checkbox"/>	Jag
<input checked="" type="checkbox"/>	test_SubAdmin22	S	sub123@outlook.com	Marketing Team	<input checked="" type="checkbox"/>	Jag

New User Reset Password(s) Add Multiple Users

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

Help for this page

25°C Party sunny

Q Search

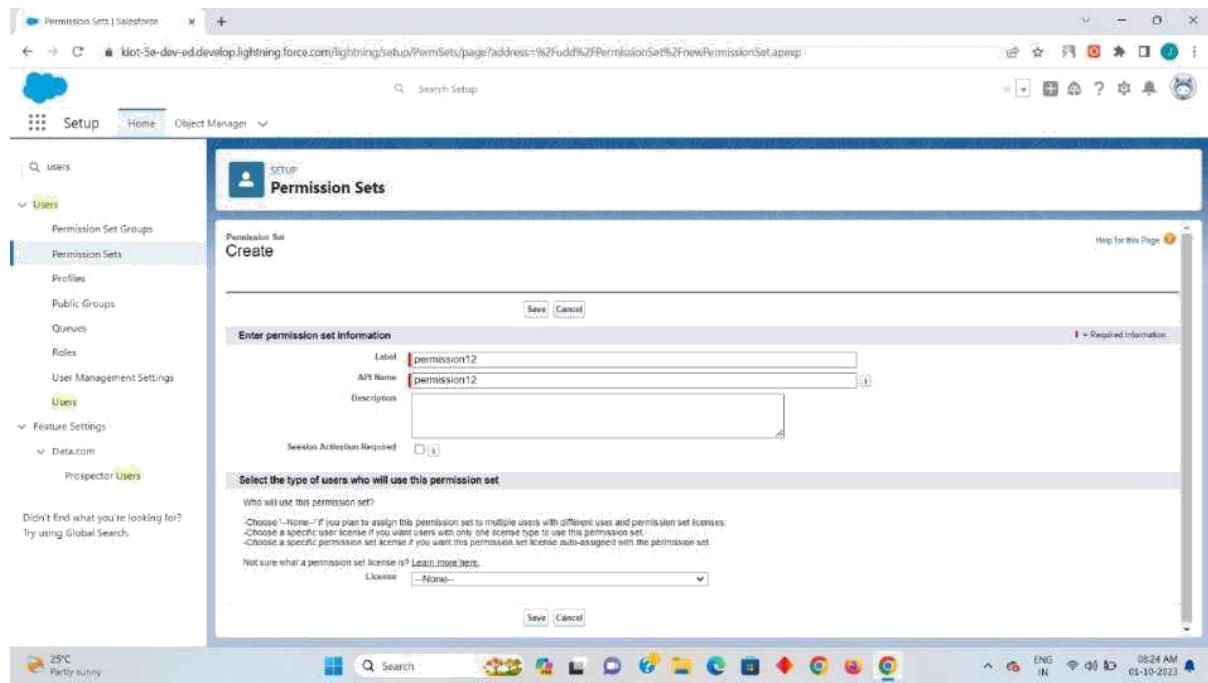
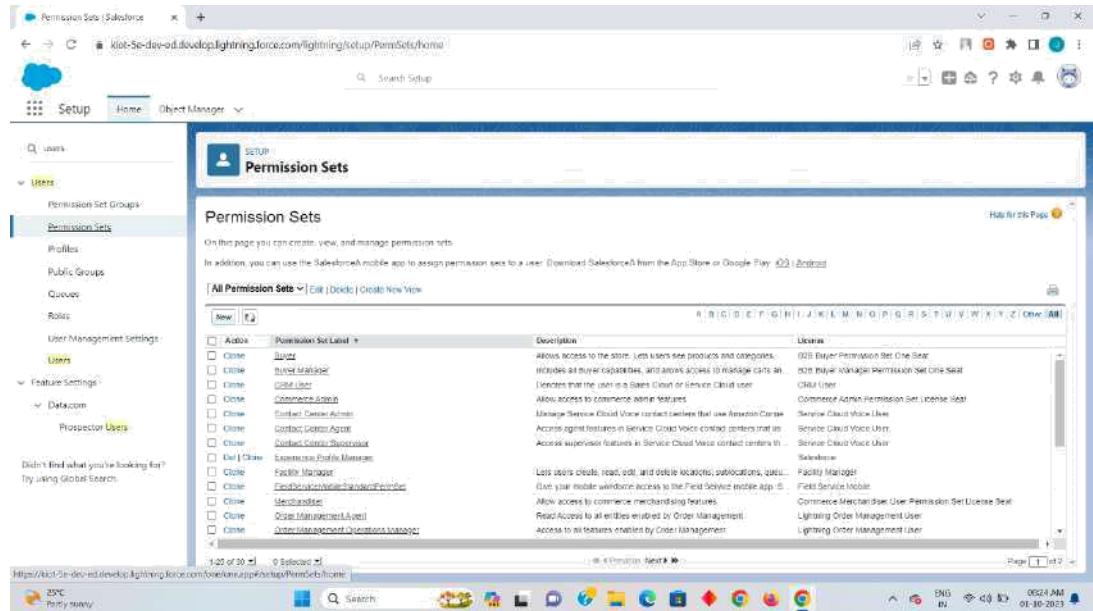
ENG IN 08:24 AM 03-10-2023

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

Setup Home Object Manager

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Quotas

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector

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

25°C Partly sunny

Search Setup

SETUP Permission Sets

permission12

Find Settings Close Delete Edit Properties Manage Assignments

Permission Set Overview

Description	API Name	permission12
License	Name Prefix	
Session Activation Required	Created By	jayadev.S 01/10/2023 8:24 am
Last Modified By		

Apps

Assigned Apps

Assigned Connected Apps

Object Settings

App Permissions

Apex Class Access

Visualforce Page Access

External Data Source Access

API Version: 100.0 Last Modified: 01/10/2023 8:24 am

08:24 AM 01-10-2023 ENG IN

Permission Sets | Salesforce

Setup Home Object Manager

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Quotas

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector

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

25°C Partly sunny

Search Setup

SETUP Permission Sets

permission12

Find Settings Close Delete Edit Properties Manage Assignments

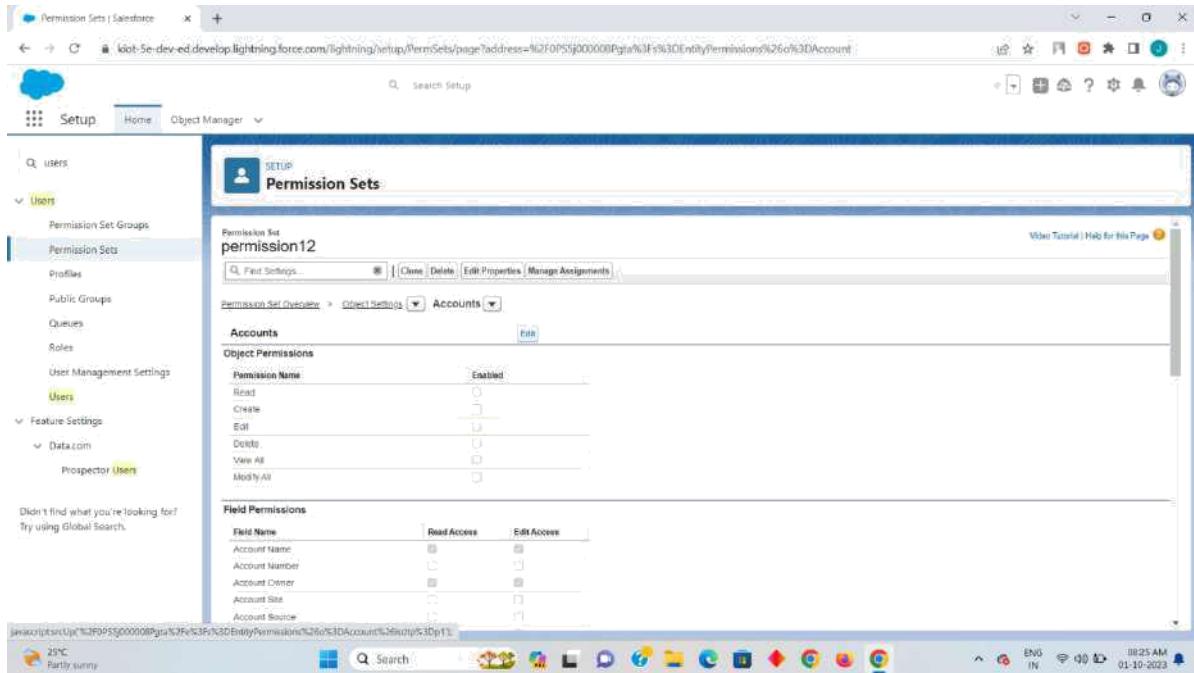
Permission Set Overview Object Settings

Object Settings

Object Name	Object Permissions	Total Fields	Tab Settings
Account	No Access	3	—
Account Brands	No Access	44	—
Activity	No Access	—	—
Attachment	No Access	—	—
Attachment Items	No Access	—	—
Attachment Parent Methods	No Access	27	—
API Apex Callout Stores	No Access	14	—
Asia Analytics Query Requests	No Access	—	—
Appointment Usage Aggregates	No Access	—	—
Appointment Categories	No Access	3	—
Appointment Invitations	No Access	17	—
Appointment Invitations	—	4	—
Appointment Schedule Aggregates	No Access	—	—
Appointment Schedule Loss	No Access	—	—
Appointment Task Time Slots	No Access	5	—
Asset Actions	No Access	30	—
Asset Action Sources	No Access	18	—

API Version: 100.0 Last Modified: 01/10/2023 8:24 am

08:25 AM 01-10-2023 ENG IN



Step 7:

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

The screenshots show the Salesforce Setup interface for managing Permission Sets. In the first screenshot, the 'Delete' permission is checked for both Object and Field levels. In the second screenshot, the 'Delete' permission has been uncheck for both levels.

Permission Set	Object	Object Permissions	Field Permissions
permission12	Accounts	Read	Read Access
		Create, Edit, Delete, View All, Modify All	Read Access
	Account Name, Account Number, Account Owner, Account Site, Account Source	Read	Read Access
		Write	Edit Access

Step 8

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

The screenshots illustrate the process of creating and assigning a Permission Set named "permission12".

Screenshot 1: Current Assignments

The "Current Assignments" screen shows a cactus and sun illustration. A message indicates "No assignments defined."

Screenshot 2: Select Users to Assign

The "Select Users to Assign" screen displays a list of users under the "All Users" filter. The user "Jagadish" is selected, highlighted with a blue border.

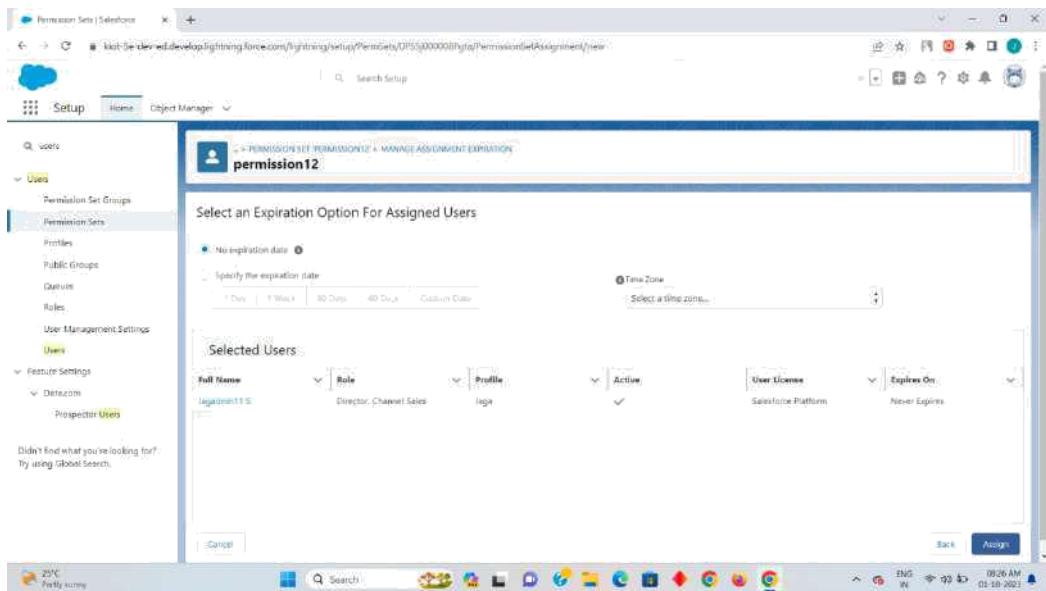
Full Name	Alias	Username	Role	Active	Profile
Jagadish S	JS	js@gmail.com	SI Admin	<input checked="" type="checkbox"/>	System Administrator
Jagadish S	JS	jag111@gmail.com	Channel Sales Team	<input type="checkbox"/>	Standard Platform User
Jagadish11 S	JS	jw123@gmail.com	Director, Channel Sales	<input checked="" type="checkbox"/>	Jago
Jagadish22 S	JS	jw1@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Jago

Screenshot 3: Select Users to Assign

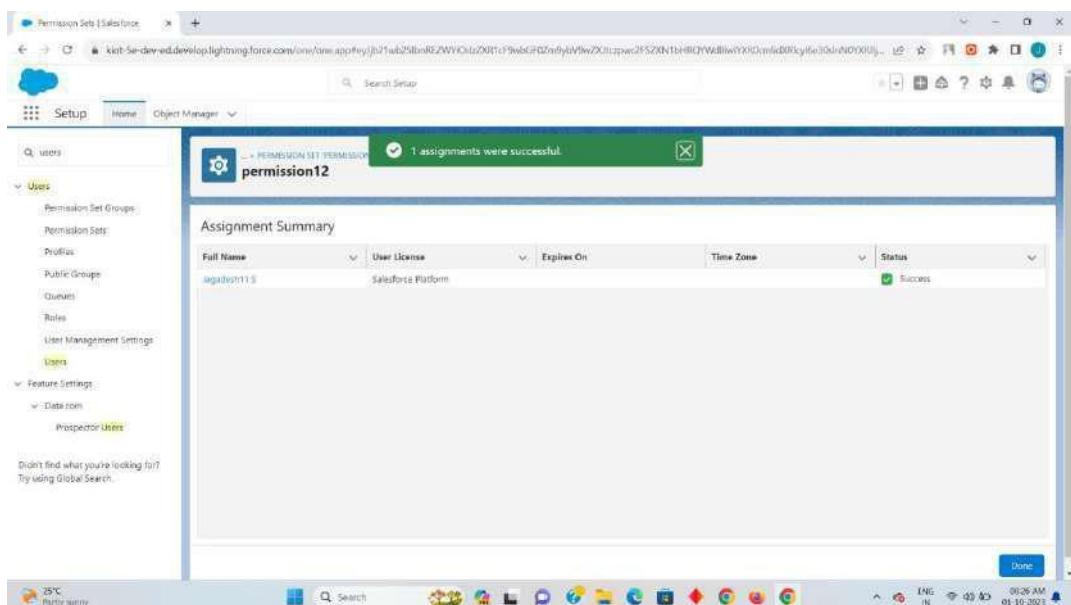
The "Select Users to Assign" screen shows the same list of users, but the user "Jagadish" is now deselected, indicated by a gray border.

Full Name	Alias	Username	Role	Active	Profile
Jagadish S	JS	js@gmail.com	SI Admin	<input type="checkbox"/>	System Administrator
Jagadish S	JS	jag111@gmail.com	Channel Sales Team	<input type="checkbox"/>	Standard Platform User
Jagadish11 S	JS	jw123@gmail.com	Director, Channel Sales	<input checked="" type="checkbox"/>	Jago
Jagadish22 S	JS	jw1@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Jago

Click on next.



Now click on Assign.



Now the specific access for the Jagadeesh11 user has been assigned successfully.

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

Solution:

Step 1: Create a Custom Object

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

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

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

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

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

The screenshot shows the 'Email Template' page in Salesforce. At the top, it displays the template name 'Thank You Email - Survey'. On the right, there are buttons for 'Edit in Builder', 'Edit', and 'Clone'. Below the title, there are two tabs: 'Details' (which is selected) and 'Related'. Under the 'Information' section, there are fields for 'Email Template Name' (set to 'Thank You Email - Survey'), 'Description' (empty), 'Related Entity Type' (set to 'Survey Result'), 'Folder' (set to 'Public Email Templates'), and a checkbox labeled 'Made in Email Template Builder' which is checked. In the 'Message Content' section, there are two tabs: 'Subject' (set to 'Thank You For Completing Our Survey!') and 'Enhanced Letterhead'. The 'HTML Value' tab contains the following content:

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

Below the message content, under 'Additional Information', there are fields for 'Created By' (set to 'Rakesh Gupta, 12/21/2020, 4:23 PM') and 'Last Modified By' (set to 'Rakesh Gupta, 12/21/2020, 4:32 PM').

Step 3: Create an Email Alert

- 1.Click Setup.**
- 2.In the Quick Find box, type Email Alerts.**
- 3.Select Email Alerts, click on the New Email Alert button.**

- 4.Name the Email Alert and click the Tab button. The Unique Name will populate.**

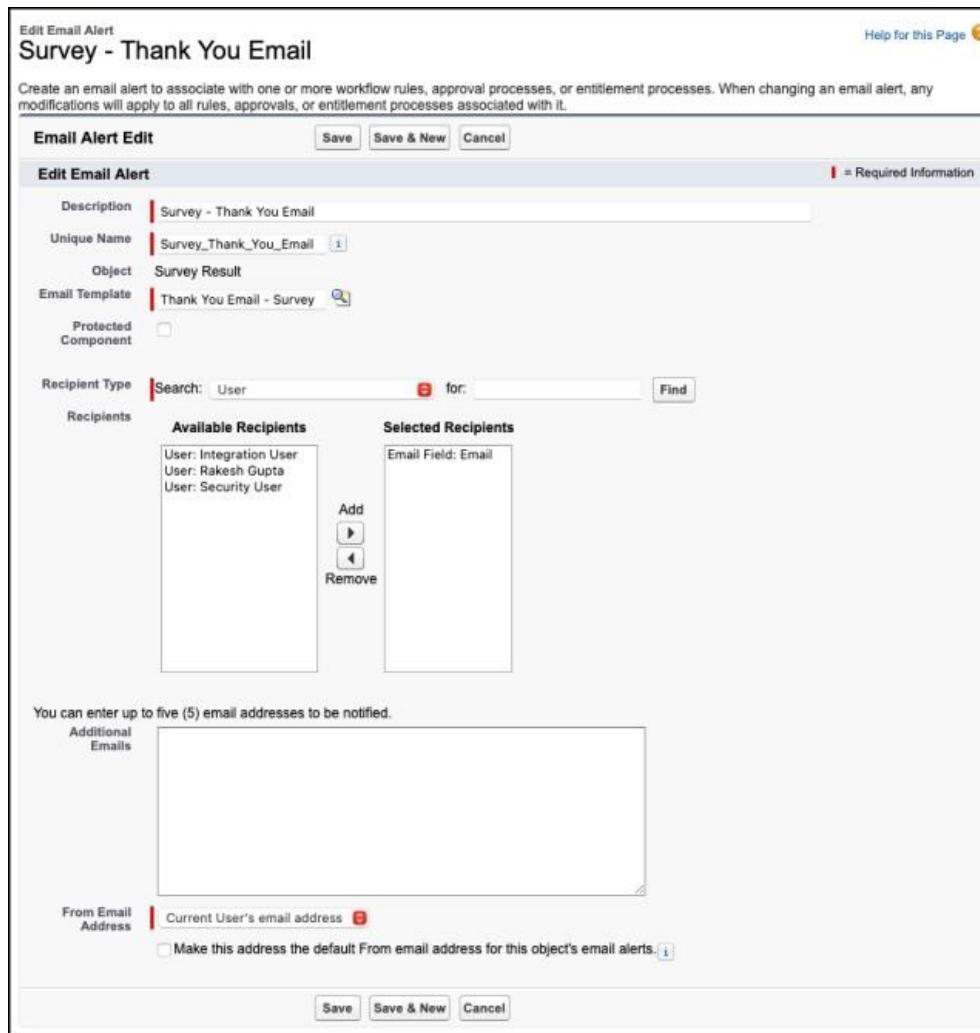
5. For Object select Survey Result.

6. For the Email Template chooses Lightning Email Template Thank You Email – Survey.

7. For Recipient Type select Email Field: Email.

8. Click Save.

Salesforce screenshot showing the 'Edit Email Alert' page for 'Survey - Thank You Email'. The alert is configured to trigger on 'Survey Result' using the 'Thank You Email - Survey' template. The recipient type is set to 'Email Field: Email'. Under 'Recipients', three users are listed in the available recipients list: 'User: Integration User', 'User: Rakesh Gupta', and 'User: Security User'. The 'Selected Recipients' list contains 'Email Field: Email'. The 'From Email Address' field is set to 'Current User's email address'. The 'Additional Emails' field is empty. Buttons at the bottom include 'Save', 'Save & New', and 'Cancel'.



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

1. Click Setup.

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

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

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

1.Row 1:

1.Field: Comment__c

2.Value: {!Comment}

2.Click Add Row

3.Row 2:

1.Field: Email_c

2.Value: {!Email.value}

4.Click Add Row

5.Row 3:

1.Field: Name_c

2.Value: {!Name.firstName}

{!Name.lastName}

6.Click Add Row

7.Row 3:

1.Field: Rating_c

2.Value: {!Rating}

7.Click Done.

Edit Create Records

Create Salesforce records using values from the flow.

* Label	* API Name
Save Response	Save_Response
Description	
How Many Records to Create	
<input checked="" type="radio"/> One <input type="radio"/> Multiple	
How to Set the Record Fields	
<input type="radio"/> Use all values from a record <input checked="" type="radio"/> 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"/> A3 Comment X
Field	Value
Email__c	<input type="text"/> A3 Email > Value X
Field	Value
Name__c	<input type="text"/> (!Name.firstName) (!Name.lastName)
Field	Value
Rating__c	<input type="text"/> A3 Rating X
+ Add Field	
Manually assign variables	
Cancel Done	

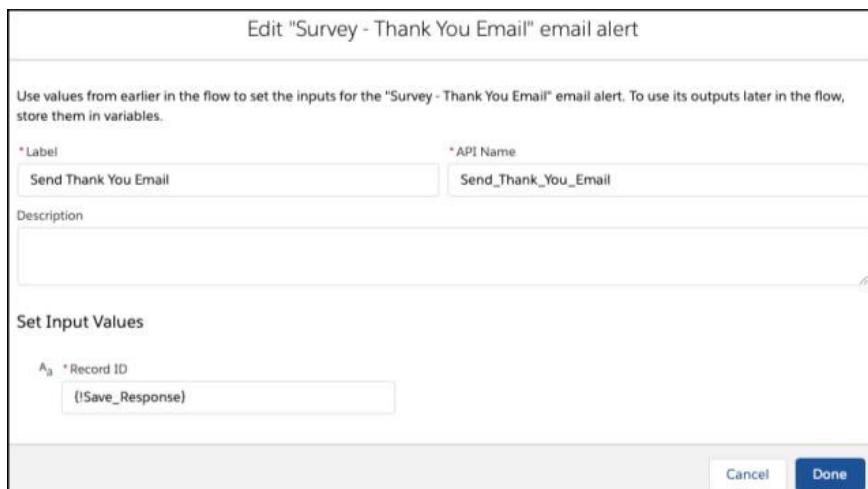
Step 4.3: Salesforce Flow — Call an Action — Email Alert to Send Out Thank You Email

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

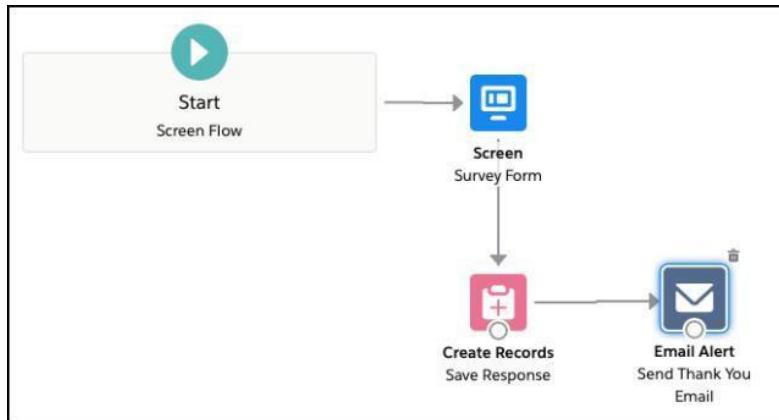
- 1.Under **Toolbox**, select **Element**.
- 2.Drag-and-drop **Action** element onto the Flow designer.
- 3.In the **Action** box, type **Survey – Thank You Email**.

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

5. Click Done.



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



1. Click Save.

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

3. Click Show Advanced.

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

5. Type: Screen Flow

6. API Version for Running the Flow: 51

7. Interview Label: Survey

{!\$Flow.CurrentDateTime}

8. Click Save.

Save as

A New Version **A New Flow**

* Flow Label: Survey

* Flow API Name: Survey

Description:

Hide Advanced

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

* Type: Screen Flow

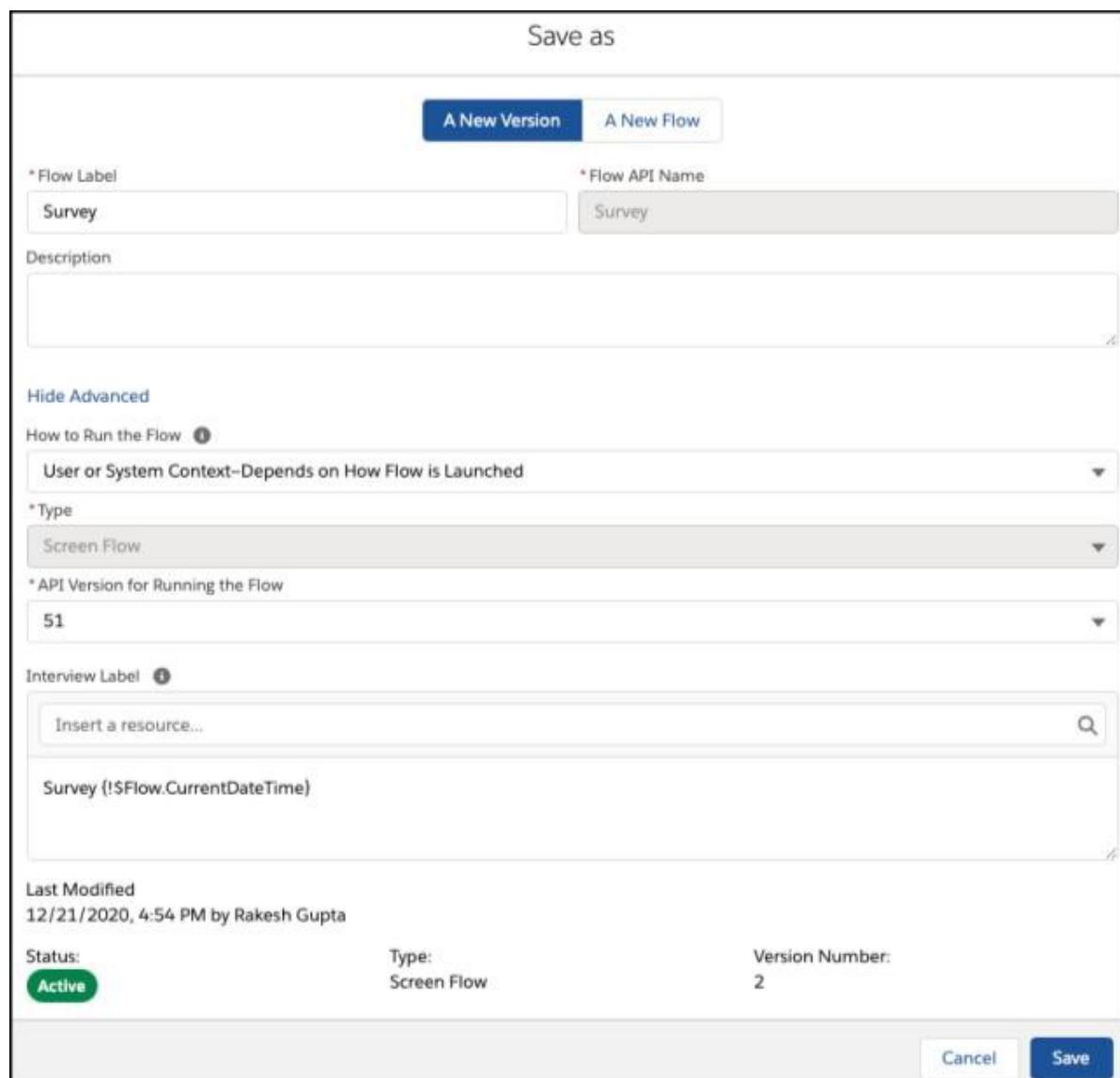
* API Version for Running the Flow: 51

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

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

Status: **Active** Type: Screen Flow Version Number: 2

Cancel **Save**

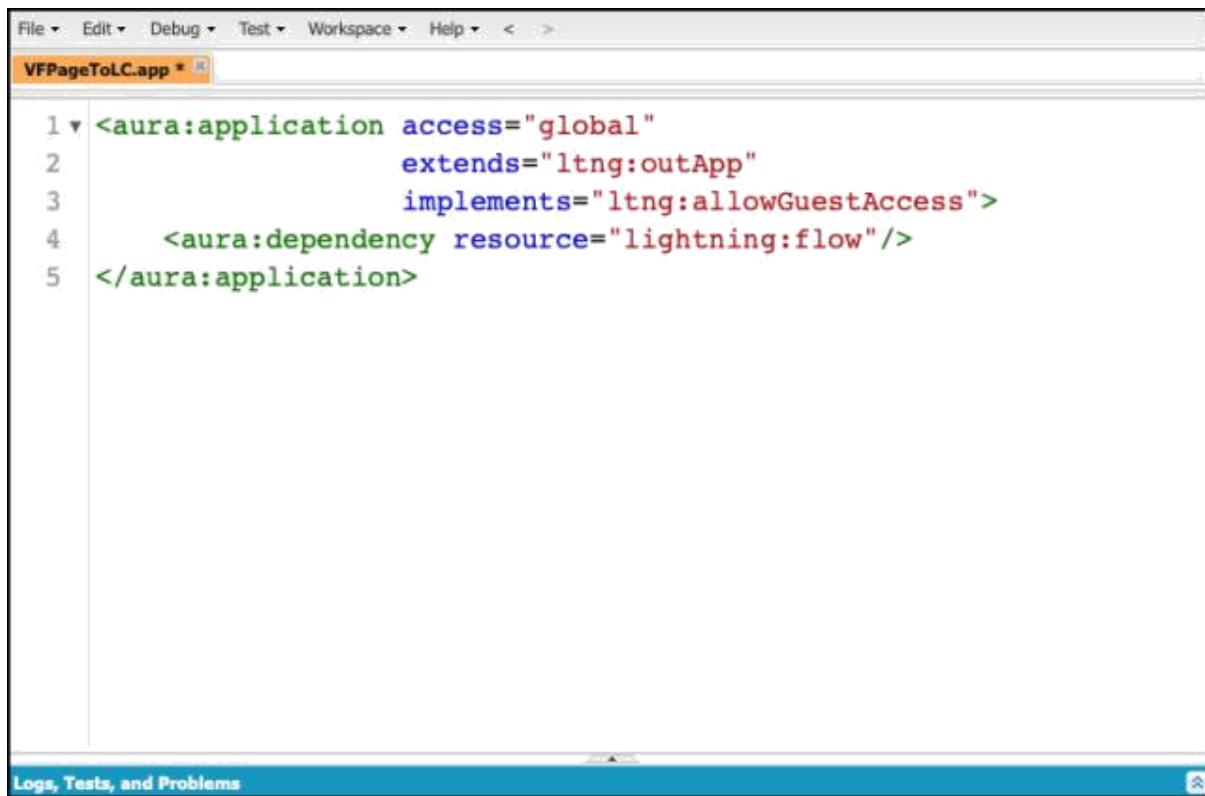


Step 5: Create a Lightning Application to Render Lightning Runtime for Flow in a Visualforce Page

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

- 1.Click Setup | Developer Console**
- 2.Navigate to File | New | Lightning Application**
- 3.Enter a Name (VFPPageToLC) field, make sure to select the Lightning Out Dependency App checkbox.**
- 4.Click Submit.**

- 5.Copy code from [GitHub](#) and paste it into your Lightning Application.**
- 6.Save your code.**



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

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

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

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

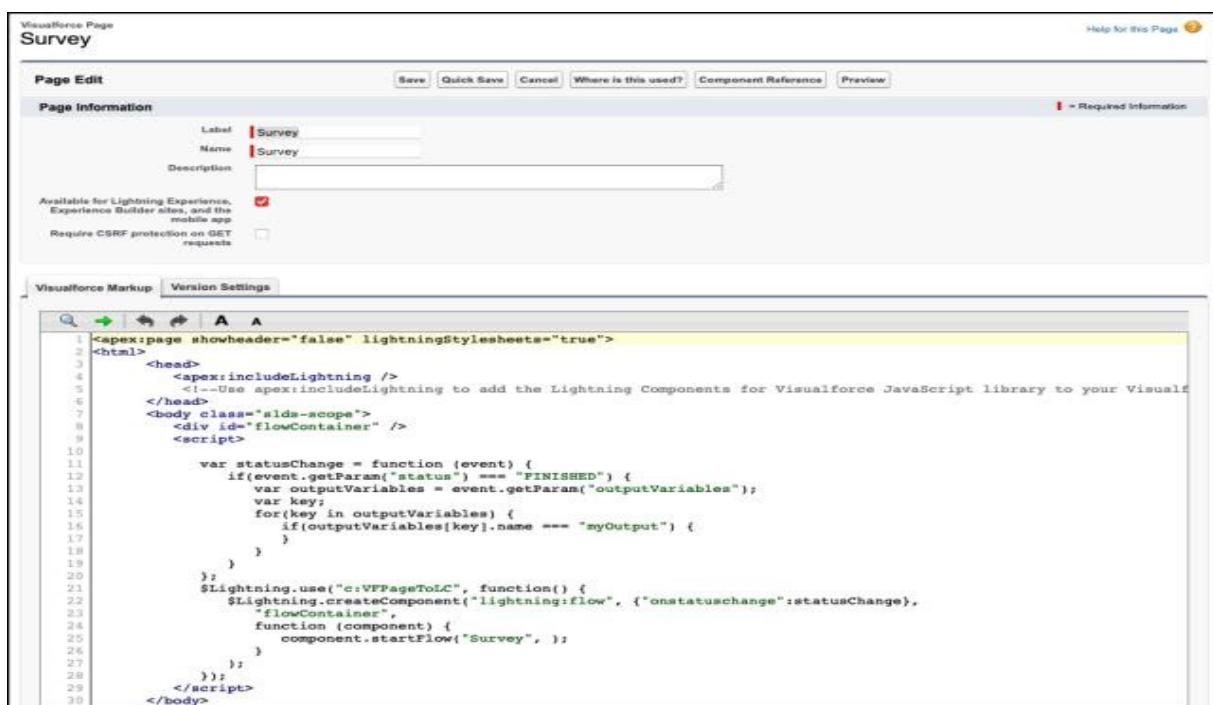
Now we will create a Lightning Application that declares a dependency on the **lightning:flow** component.

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

component on the page using `$Lightning.createComponent()`

1. Click **Setup**.
2. In the Quick Find box, type **Visualforce Pages**.
3. Clicks on the **New** button.

4. Copy code from [GitHub](#) and paste it into your visualforce page
5. Click **Save**.



The screenshot shows the Salesforce Visualforce Page Editor. At the top, there's a header with tabs like 'Visualforce Page', 'Survey', 'Help for this Page', and a gear icon. Below the header 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 with fields for 'Label' (Survey), 'Name' (Survey), and 'Description'. It also includes 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 is active, showing a code editor with the following JavaScript 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") {
                            ...
                        }
                    }
                };
                $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://kathar-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 Users	<input checked="" type="checkbox"/>	
Upgrade all requests to HTTPS	<input checked="" type="checkbox"/>	
Enable Content Sniffing Protection	<input checked="" type="checkbox"/>	
Enable Browser Cross Site Scripting Protection	<input checked="" type="checkbox"/>	
Referrer URL Protection	<input checked="" type="checkbox"/>	
Guest Access to the Payments API	<input type="checkbox"/>	

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

Proof of Concept

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

Survey

Name

First Name
Alok

Last Name
Sinfal

* Email
[REDACTED]

* Rating
5

* Comment
Awesome Blog 

[Next](#)

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

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

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

Thanks,
Automation Champion

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