

**NAAN MUDHALVAN**

**ASSIGNMENT**

**on**

**[SALESFORCE]**

**CREATION OF AN APPLICATION**

**FOR SCHOOL MANAGEMENT**

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**NM ID -**

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

Solution:

Step 1: Create Custom Objects

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

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

- Page Header:** SETUP, Home, Object Manager
- Section:** New Custom Object
- Custom Object Definition Edit:**
  - Custom Object Information:**
    - Label: college
    - Plural Label: colleges
    - Stems with violent sound:
    - The Object Name is used when referencing the object via the API.
    - Object Name: college
    - Description: (empty text area)
    - Context-Sensitive Help Setting: Open the standard Salesforce.com Help & Training window (selected)
    - Context Name: college
  - Enter Record Name Label and Format:**
    - The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.
    - Record Name: college Name
    - Date Type: Text
  - Optional Features:**
    - Allow Reporting
    - 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.
    - Allow Sharding
    - 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.
    - 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

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

The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. A banner at the top indicates that permissions for this object are disabled for all profiles by default. The main section is titled 'New Custom Object' and contains the following fields:

- Custom Object Definition Edit**: Includes tabs for 'Save', 'Save & New', and 'Cancel'.
- Custom Object Information**: Fields include:
  - Label**: department (Example: Account)
  - Plural Label**: departments (Example: Accounts)
  - Stems with visual studio**:
- The Object Name is used when referencing the object via the API**: Fields include:
  - Object Name**: department (Example: Account)
  - Description**: (Empty text area)
- Case-Sensitive Help Setting**: Options include:
  - Open the standard Salesforce.com Help & Training window
  - Open a window using a Visualforce page
- Context Name**: dropdown menu
- Enter Record Name Label and Format**: Fields include:
  - Record Name**: Department Name (Example: Account Name)
  - Date Type**: Text (dropdown menu)
- Optional Features**: Options include:
  - Allow Reporting
  - Allow Activities
  - Track Field History
  - Allow in Chatter Groups
  - Enable Licensing
- Object Classification**: Options include:
  - Allow Sharding
  - Allow DDL API Access
  - Allow Streaming API Access
- Deployment Status**: Options include:
  - In Development
  - Deployed
- Search Status**: Options include:
  - Allow Search
- Object Creation Options (Available only when custom object is first created)**: Options include:
  - Add Notes and Attachments related list to default page layout
  - Launch New Custom Tab Wizard after saving this custom object

At the bottom are 'Save', 'Save & New', and 'Cancel' buttons.

## Step 2: Create a Master-Detail Relationship

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

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

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

The screenshot shows the Salesforce Object Manager interface for the CDepartment object. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'CDepartment'. The left sidebar lists various configuration tabs: 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. The 'Fields & Relationships' tab is selected. The right panel displays the 'Details' section for the CDepartment object. It includes fields for API Name ('CDepartment\_\_c'), Description ('Custom'), Singular Label ('CDepartment'), Plural Label ('CDepartments'), and a 'Track Field History' checkbox. Other sections like 'Tracked Reports', 'Track Activities', 'Deployment Status', and 'Help Setting' are also present.

The screenshot shows the process of creating a new relationship for the CDepartment object. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'CDepartment'. The left sidebar lists various configuration tabs: 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. The 'Fields & Relationships' tab is selected. The right panel shows a 'New Relationship' wizard. Step 3, titled 'Enter the label and name for the lookup field', is displayed. It asks for 'Field Label' (set to 'college') and 'Field Name' (set to 'college'). Below these are 'Description' and 'Help Text' fields. Under 'Sharing Settings', the 'Child Relationship Name' is set to 'CDepartments'. It includes options for 'Read Only' (selected) and 'ReadWrite' (which allows users with at least ReadWrite access to the Master record to create, edit, or delete related Detail records). There are also checkboxes for 'Allow reparenting' and 'Auto add to existing report type'. A 'Lookup Filter' section is at the bottom.

The top screenshot shows the 'New Relationship' step 2 of 6. It asks to select the related object, with 'college' typed into the search bar. The bottom screenshot shows the 'New Custom Field' step 1 of 6, choosing the field type as 'Master-Detail Relationship'.

## Step 3: Create the Roll-Up Summary Field

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

1. Still on the "College\_C" settings, go to "Fields & Relationships."

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

The screenshot shows the Salesforce Object Manager interface for the 'CDepartment' object. The 'Fields & Relationships' section displays the following fields:

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)		

The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar at the top right says 'Search Setup'. Below the navigation, a sidebar on the left lists 'User Interface' sections: 'Customize Tabs and Labels' (selected), 'Customize Buttons and Labels', 'Customize Fields and Labels', 'Customize Forms and Labels', 'Customize Layouts and Labels', 'Customize Record Types', 'Customize Reports and Dashboards', and 'Customize Reports and Dashboards'. A message at the bottom of the sidebar says 'Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'Custom Tabs' and contains a sub-section 'Custom Object Tabs'. It shows a table with three rows:

Action	Label	Tab Style	Description
Edit / Del	Books	Basic	
Edit / Del	Research Proposal	Advanced	
Edit / Del	Stress	Basic	

Below this are sections for 'Web Tabs', 'Visualforce Tabs', 'Lightning Component Tabs', and 'Lightning Page Tabs', each with a note 'No [tab type] tabs have been defined'.

The screenshot shows the Salesforce Setup interface for creating a new custom field. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar at the top right says 'college'. The main content area is titled 'New Custom Field' and shows the 'Step 5: Add to page layouts' screen. On the left, a sidebar lists 'Fields & Relationships' sections: 'Page Layouts' (selected), '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'. The main form has a header 'Step 5: Add to page layouts' with a progress bar 'Step 5 of 5'. It contains fields for 'Field Label' (Total count), 'Data Type' (Setup Summary), 'Field Name' (Total\_count), and 'Description'. A note says '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.' Below this is a section for 'Page Layout Name' with checkboxes for 'Add Field' and 'college Layout'. At the bottom, a note says 'When finished, click Save & New to create more custom fields, or click Save if you are done.' and buttons for 'Previous', 'Save & New', 'Save', and 'Cancel'.

The screenshot shows the Salesforce setup interface for creating a new custom field named "Total count". The field is defined as a Roll-up Summary type with the internal name "Total\_count". The "Field Level Security for Profile" section lists various user profiles, each with checkboxes for "Write" and "Read Only". Most profiles have both checkboxes checked, except for "Franchisee Admin - Non-Subscription User" which only has "Read Only" checked.

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 Pages Admin	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contact Manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cross Org Data Prof User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom Marketing Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom Sales Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom Support Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Customer	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Franchisee Admin - Non-Subscription User	<input type="checkbox"/>	<input checked="" type="checkbox"/>

The screenshot shows the Salesforce setup interface for defining a summary calculation for the "Total count" field. In the "Select Object to Summarize" section, "college" is chosen as the Master Object and "Departments" is chosen as the Summarized Object. Under "Select Roll-Up Type", "COUNT" is selected. A yellow highlighted area shows the "Field to Aggregate" dropdown set to "Name". The "Filter Criteria" section contains two options: "All records should be included in the calculation" (selected) and "Only records meeting certain criteria should be included in the calculation".

**New Custom Field**

**Step 2. Enter the details**

Help for this page [?](#)

Field Label:  [\(1\)](#)

Field Name:  [\(1\)](#)

Description:

Help Text:

Auto add to custom report type:  Add this field to existing custom report types that contain this entity [\(1\)](#)

Previous Next Cancel

**New Custom Field**

**Step 1. Choose the field type**

Help for this page [?](#)

**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. The 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 ownership and sharing of a detail record are determined by the master record.
- You can create relationship fields on the master record to summarize the detail records.
- You can create relationship summary fields on the master record to summarize the detail records.

The [Master-Detail](#) field allows users to click on a lookup icon to select a value from a pop-up list. The master object is the source of the values in the list.

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

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

Next Cancel

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'college'. On the left, there's a sidebar with various configuration links like 'Page Layouts', 'Lightning Record Pages', etc. The main content area is titled 'Fields & Relationships' and lists four items: 'college Name', 'Created By', 'Last Modified By', and 'Owner'. Each item has columns for 'FIELD LABEL', 'FIELD NAME', 'DATA TYPE', 'CONTROLLING FIELD', and 'INDEXED'. Buttons at the top right include 'Quick-Field', 'New', 'Deleted Fields', 'Field Dependencies', and 'Set History Tracking'.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
college Name	Name	Text(10)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User/Group)		

## Step 4: Create a Lightning App

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

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

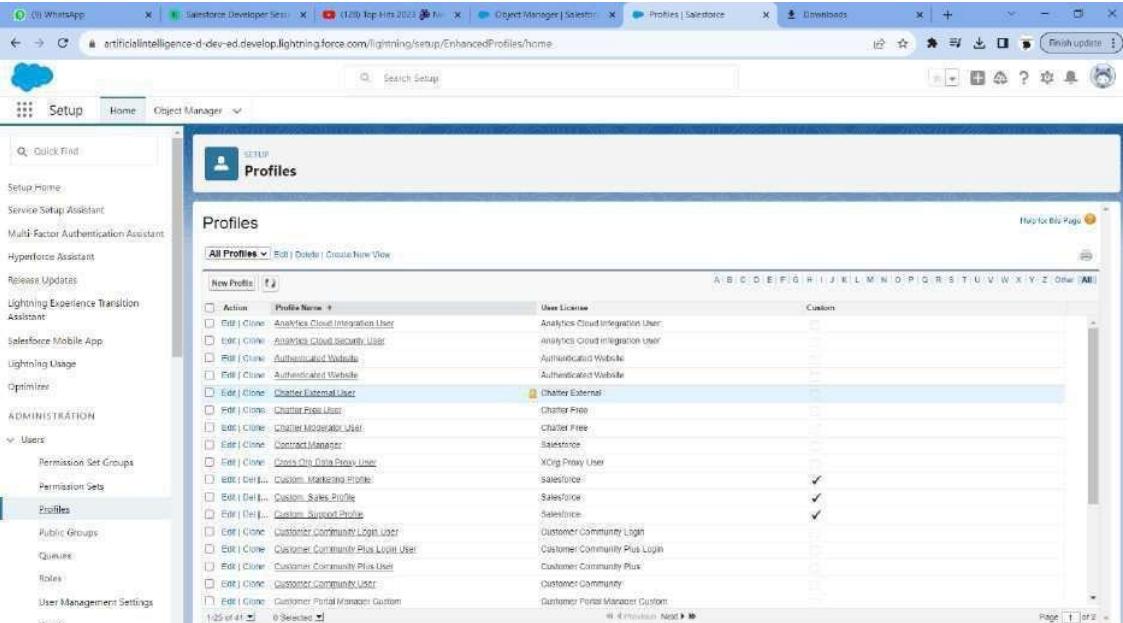
## 11. Test the app with the assigned users.

The screenshot shows the Salesforce Setup interface with the 'Tabs' tab selected under 'User Interface'. The page title is 'New Custom Object Tab' and it is Step 2 of 3. The sub-step is 'Add to Profiles'. The instructions say: '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'. A list of user profiles is shown on the left, and their corresponding 'Tab Visibility' dropdown menus are on the right. The profiles listed include: Analytics Cloud Integration User, Analytics Cloud Security User, Authenticated Website, Authenticated Website, Cloud Kicks Admin, Contract Manager, Cross Org Data Proxy User, Customer Marketing Profile, Custom\_Sales Profile, Custom\_Support Profile, customer, Customer Community Login User, Customer Community Plus Login User, Customer Community Plus User, Customer Community User, Customer Portal Manager - Custom, Customer Portal Manager - Standard, External Apps Login User, External Identity User, Force.com - App Subscription User, Force.com - Free User, Gold Partner User, High Volume Customer Portal User, Identity User, Manager, Marketing User, Minimum Access - Salesforce, Partner App Subscription User, Partner Community Login User, Partner Community User, Read Only, Research Manager, Research User, Salesforce API Only System Integrations, Sales User, security profile, Silver Partner User, Solution Manager, Standard Platform User, Standard User, System Administrator. At the bottom right are 'Previous', 'Next', and 'Cancel' buttons.

**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 is collapsed, and the main area displays a list of profiles. The 'Profiles' tab is selected at the top. The list includes various standard and custom profiles, each with an 'Edit | Clone' link and a 'User License' column. The 'Custom' column indicates which profiles are custom. The 'Actions' column contains checkboxes for selecting multiple profiles. The bottom of the list shows pagination with '1 of 2' pages.

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

The screenshot shows two instances of the Salesforce Setup interface. The top instance displays the 'Profiles' page, which lists various profiles with their names, actions (Edit, Clone), and user licenses (Salesforce Integration, Salesforce, Salesforce Partner, Salesforce Platform). The bottom instance shows a 'Clone Profile' dialog box, prompting the user to enter a new profile name and select an existing profile to clone from. Both dialogs are centered over a background of the 'Profiles' page.

**Profiles**

All Profiles | Edit | Delete | Create New View

New Profile:

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit   Clone	Salesforce API Only System Integrator	Salesforce Integration	
<input type="checkbox"/> Edit   Clone	Administrator	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Super Partner User	Salesforce Partner	
<input type="checkbox"/> Edit   Clone	System Manager	Salesforce	
<input type="checkbox"/> Edit   Clone	Standard Platform User	Salesforce Platform	
<input type="checkbox"/> Edit   Clone	System Administrator	Salesforce	

Help for this Page

**Clone Profile**

Enter the name of the new profile.

You must select an existing profile to clone from.

1 = Required information

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

Save Cancel

Help for this Page

**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	<input type="text" value="Manager"/>

**Save** **Cancel**

**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.

Logoff Buttons | Enabled User Click Access | Enabled Visualforce Page Access | Enabled External Data Source Access | Enabled Shared Credential Access | Enabled External Credential Principal Access | Enabled Custom Metadata Type Access | Enabled Custom Listing Definitions Access | Enabled File Access | Enabled Search Results Status Access | Enabled Custom Permissions

**Profile Detail**

Name	Manager	Custom Profile	<input checked="" type="checkbox"/>
User License	Salesforce Platform		
Description	QSEPLS - 01/10/2023, 7:00 pm	Modified By	QSEPLS - 01/10/2023, 7:00 pm

**Page Layouts**

Standard Object Layout	Global	Operating Hours
Email Application	Global Layout [View Assignment]	Operating Hours Layout [View Assignment]
Home Page Layout	Not Available	Order [View Assignment]
Account	Home Page Default [View Assignment]	Order Product [View Assignment]
Alternative Payment Method	Account Layout [View Assignment]	Payment [View Assignment]
Appointment Invitation	Alternative Payment Method Layout [View Assignment]	Payment Authorization Adjustment [View Assignment]
Asset	Appointment Invitation Layout [View Assignment]	Payment Gateway [View Assignment]

Screenshot of the Salesforce Setup interface showing the Profiles Manager screen.

**Profile Edit**

Name	Visible	Default
Manager	<input type="checkbox"/>	<input checked="" type="radio"/>
Salesforce Platform	<input checked="" type="checkbox"/>	<input type="radio"/>

**Custom App Settings**

Analytics Studio (standard_analytics)	Visible	Default
App Launcher (standard_AppLauncher)	<input type="checkbox"/>	<input checked="" type="radio"/>
Not (not)	<input checked="" type="checkbox"/>	<input type="radio"/>

Platform (standard_Platform)	Visible	Default
WDC (standard_Work)	<input type="checkbox"/>	<input checked="" type="radio"/>

**Service Provider Access**

**Tab Settings**

Overwrite users' personal tab customizations

Name	Default On
Accounts	<input checked="" type="radio"/>
Alert Settings	<input type="radio"/>

Leaving  Default On  
Licenses  Tab Hidden

**Communication Subscription Channel Types**

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

**Individuals**

Locations	Visible	Default
Party Contacts	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Push Topics	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Salesforce	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Streaming Channels	<input checked="" type="checkbox"/>	<input type="checkbox"/>
User External Credentials	<input type="checkbox"/>	<input type="checkbox"/>

**Custom Object Permissions**

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

**Session Settings**

Session Timeout Out After: 2 hours of inactivity

Session Security Level Required at Login: None

**Password Policies**

User password expire in: 90 days  
Enforce password history: 3 passwords remembered  
Minimum password length: 8

The screenshot shows the Salesforce Setup Profiles page. The left sidebar lists various setup categories like Service Setup Assistant, Multi-Factor Authentication Assistant, and Lightning Experience Transition Assistant. The main content area is titled "Profiles". It displays "Custom Object Permissions" for the "Bank" and "Customers" objects, with columns for Read, Create, Edit, Delete, View All, and Modify All. Below this is a "Session Settings" section with "Session Times Out After" set to "2 hours of inactivity" and "Session Security Level Required at Login" set to "None". At the bottom is a "Password Policies" section with various configuration options.

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

- Setup Home**: The main navigation bar includes links like Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, and Salesforce Mobile App.
- Object Manager**: A dropdown menu under the Setup icon.
- Search Bar**: A search bar at the top right with placeholder text "Search Setup".
- Profiles Page**: The main content area displays the "Profiles" section of the Object Manager. It includes:
  - Custom Object Permissions**: A table showing permissions for "Bank" and "customers" objects across "Basic Access" and "Data Administration" categories.
  - Session Settings**: Fields for "Session Timeout Duration" (set to "2 hours of inactivity") and "Session Security Level Required at Login" (set to "None").
  - Password Policies**: A detailed configuration section with the following settings:
    - "User passwords expire in" dropdown set to "90 days".
    - "Enforce password history" dropdown set to "3 passwords remembered".
    - "Minimum password length" input field set to "8".
    - "Password complexity requirement" dropdown set to "Must include alpha and numeric characters".
    - "Password question requirement" dropdown set to "Cannot contain password".
    - "Maximum invalid login attempts" dropdown set to "10".
    - "Lockout effective period" dropdown set to "15 minutes".
    - "Disclose secret answer for password reset" checkbox is unchecked.
    - "Require a minimum 1 day password lifetime" checkbox is unchecked.
    - "Don't immediately expire links to temporary password emails" checkbox is unchecked.

**Profiles**

Custom Object Permissions

	Basic Access	Data Administration	Basic Access	Data Administration								
	Read	Create	Edit	Delete	View All	Modify All	Read	Create	Edit	Delete	View All	Modify All
Bank	<input 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 replacement: Cannot contain password
- Maximum invalid login attempts: 10
- Lockout effective period: 15 minutes
- Obligate secret answer for password: No
- Requires a minimum 1 day password lifetime: No
- Don't immediately expire links in forgot password emails: No

**Users**

All Users

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

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

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

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> <a href="#">Edit</a>   <a href="#">Login</a>	Alexandra.Doe	alex	test_cwe_cas_b0ff1c9f8a92fb0e9a3d10ffcc9a52e9@mail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	HR User
<input type="checkbox"/> <a href="#">Edit</a>	Charlie.Frost	charlie	charlie000000000000000000000000000000@mail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Charlie Free User
<input type="checkbox"/> <a href="#">Edit</a>   <a href="#">Login</a>	Elton.Jones	elton	elton.vision11@salesforce.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/> <a href="#">Edit</a>	J.O.Brown	j.brown	jbrown000000000000000000000000000000@mail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> <a href="#">Edit</a>	User.Interaction	interact	interaction0000000000000000@mail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> <a href="#">Edit</a>	User.Security	sec	security0000000000000000@mail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Security User

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Setup Home Object Manager

Hyperforce Assistant Release Updates Lightning Experience Transition Assistant Salesforce Mobile App Lightning Usage Optimizer ADMINISTRATION > Users > Data > Email PLATFORM TOOLS > Apps > Previous Versions

Users

New User

User Edit Save Save & New Cancel

General Information

First Name	sohansya
Last Name	bain
Alias	sohansya
Email	2620cse179@kot.ac.in
Username	2621e@kot.ac.in
Nickname	User189616771292564528
Title	worker
Company	kot bank
Department	
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:  WSC User:  Data.com User Type: -None- Data.com Monthly Addition Limit: Default Level (1000) Accessibility Mode (Classic Only):  High Contrast Palette on Charts:  Load Lightning Pages While Scrolling:  Debug Mode:

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Setup Home Object Manager

Hyperforce Assistant Release Updates Lightning Experience Transition Assistant Salesforce Mobile App Lightning Usage Optimizer ADMINISTRATION > Users > Data > Email PLATFORM TOOLS > Apps > Previous Versions

Users

New User

User Edit Save Save & New Cancel

General Information

First Name	sohansya
Last Name	bain
Alias	sohansya
Email	2620cse179@kot.ac.in
Username	2621e@kot.ac.in
Nickname	User189616771292564528
Title	worker
Company	kot bank
Department	
Division	

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

Help for this Page

Screenshot showing the creation of a new user in Salesforce and the resulting welcome email.

**Salesforce User Creation:**

- User Detail:**
  - Name: sowmya bala
  - Email: 2k21@klot.ac.in
  - Username: 2k21@klot.ac.in
  - Title: worker
  - Company: kkt bank
  - Department:
  - Address:
  - Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata)
  - Locale: Region (India)
  - Language: English
  - Unlocked By: Manager
  - Receive Approval Requests: Only if I am an approver
  - Feedback ID:
  - App Registrations: One-Time Password Authentication
  - App Registrations: Two-Factor Authentication
- Role:** Salesforce Platform Manager
- Profile:** Manager
- Active:** ✓
- Marketing User:** ✓
- Office User:** ✓
- Knowledge User:** ✓
- File User:** ✓
- Service Cloud User:** ✓
- Sales.com Contributor User:** ✓
- Mkt.com Participant User:** ✓
- WDC User:** ✓
- Mobile Push Registrations:** Off
- Data.com User Type:** Data.com User
- Accessibility Mode (Classic Only):** Off
- Deleting Mode:** Off
- High-Contrast Colors on Charts:** Off
- Load Lightning Pages Wide Scrolling:** ✓
- Salesforce CRM Content User:** ✓

**Gmail Welcome Email:**

Subject: Welcome to Salesforce!

Dear sowmya bala,

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

Username: 2k21@klot.ac.in

Again, welcome to Salesforce!

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The image displays two screenshots of the Salesforce login interface.

**Top Screenshot:** This is the "Change Your Password" page. It features a blue header with the word "salesforce". Below it, the title "Change Your Password" is centered. A note at the top says: "Enter a new password for 2k21it@kiot.ac.in. Make sure to include at least:". It lists three requirements with green checkmarks: "8 characters", "1 letter", and "1 number". Below these are fields for "New Password" and "Confirm New Password", both containing masked text. Under "Security Question", there is a dropdown menu set to "In what city were you born?" and an "Answer" field containing "salem". At the bottom is a blue "Change Password" button. A small note at the very bottom states: "Password was last changed on 02/10/2023, 7:13 pm."

**Bottom Screenshot:** This is the standard Salesforce login page. It has a white header with the word "salesforce". The main area contains fields for "Username" (2k21it@kiot.ac.in) and "Password" (also masked). Below these are "Log In" and "Remember me" buttons, and a "Forgot Your Password?" link. To the right of the login form is a large, dark purple sidebar. On the left side of the sidebar, the text "Join us for the future of trusted enterprise AI, streaming on Salesforce+." is displayed in white. On the right side, there is a "WATCH ON DEMAND" button. The central part of the sidebar features a cartoon character with white hair and a black hoodie running towards the right, with the text "AI Day" written in large, bold, white letters.

The screenshots illustrate the Salesforce Lightning Experience interface for the Bank object.

**Top Screenshot:** Shows the "Recently Viewed" list for the Bank object. The list is currently empty, displaying the message: "You haven't viewed any Bank recently. Try switching list view."

**Bottom Screenshot:** Shows a new Bank record being created. The "Bank Name" field is populated with "bpi". Other fields visible include "Owner" (set to "sowmiya bala") and "Phone".

The screenshot displays two screenshots of the Salesforce Lightning Experience interface.

**Top Screenshot:** A modal window titled "New customer" is open, showing the "Information" section. It contains two required fields: "customer\_name" (set to "madhu") and "Bank" (set to "bol"). Below the form are three buttons: "Cancel", "Save & New", and "Save".

**Bottom Screenshot:** The customer record "madhu" has been created, as indicated by the green success message "customer 'madhu' was created." The "Details" tab is selected, showing the same information: "customer\_name" (madhu) and "Bank" (bol). The "Created by" field shows "sewamya.bala" at "01/10/2023, 7:17 pm", and the "Last Modified by" field also shows "sewamya.bala" at the same time. Navigation buttons "New Contact", "Edit", and "Delete" are visible at the top right of the card.

The image displays two screenshots of the Salesforce Setup interface, illustrating the process of cloning a profile.

**Screenshot 1: Profiles Page**

This screenshot shows the "Profiles" page in the Setup interface. The left sidebar is open, showing navigation options like Quick Find, Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, Administration, and Users. Under the "Profiles" section of the sidebar, "Profiles" is selected. The main content area displays a table of profiles:

Action	Profile Name	User License
<input type="checkbox"/>	Edit   Clone: Salesforce API Only System Integrator	Salesforce Integration
<input type="checkbox"/>	Edit   Clone: salesadmin	Salesforce
<input type="checkbox"/>	Edit   Clone: Super Partner User	Super Partner
<input type="checkbox"/>	Edit   Clone: System 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 navigation bar at the top includes links for All Profiles, Edit, Delete, Create New View, and Help for this Page. A breadcrumb trail at the bottom indicates the current location: artificialintelligence-d-dev-ed-develop.lightning.force.com /lightning/setup/EnhancedProfiles/home.

**Screenshot 2: Clone Profile Dialog**

This screenshot shows the "Clone Profile" dialog box. The title bar says "Clone Profile". The main area contains the following text: "Enter the name of the new profile." Below this, a message states: "You must select an existing profile to clone from." A dropdown menu titled "Profile Name" is open, showing three options: Existing Profile, Standard Platform User, and User License. The "SalesManager" option is selected. At the bottom of the dialog are "Save" and "Cancel" buttons.

**Setup** | Home | Object Manager | Search Setup | Profiles | Salesforce | Help for this Page

**Profiles**

**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.

**Profile Detail**

Name	salesmanage	User License	Salesforce Platform	Custom Profile	
Description		Created By	QSRMILE 01/10/2022, 7:10 pm	Modified By	QSRMILE 01/10/2022, 7:10 pm

**Page Layouts**

Standard Object Layouts	Global	Operating Hours
Email Application	GLOBAL LAYOUT [VIEW AS LIST]	GLOBAL HOURS LAYOUT [VIEW AS LIST]
Home Page Layout	Not Assigned [View Assignment]	Order Layout [View Assignment]
Account	Home Page Default [View Assignment]	Order Product Layout [View Assignment]
Alternative Payment Method	Account Layout [View Assignment]	Order Line Item Layout [View Assignment]
Appointment Invitations	Alternative Payment Method Layout [View Assignment]	Payment Layout [View Assignment]
Asset	Appointment Invitations Layout [View Assignment]	Payment Authorization Layout [View Assignment]
	Asset Layout [View Assignment]	Payment Authorization Adjustment Layout [View Assignment]
		Payment Gateway Layout [View Assignment]

**Profile Edit**

**Profile Edit**

**Custom App Settings**

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

**Service Provider Access**

**Tab Settings**

Overwrite users' personal tab customizations

**Standard Tab Settings**

Name	Default On	Leaving	Default On
Accounts	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Setup | Home | Object Manager | Search Setup: Profiles | Salesforce | Welcome to Salesforce Verify | Finish update: |

Quick Find: Profiles

Custom Object Permissions

	Bank	customers	Enhancement Requests			
	Read	Create	Edit	Delete	View All	Modify All
Bank	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
customers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Enhancement Requests	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<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
Login attempt effective period:	15 minutes
Obfuscate secret answers for password resets:	<input type="checkbox"/>
Require a minimum 1 day password lifetime:	<input type="checkbox"/>
Don't immediately expire links to forget password emails:	<input type="checkbox"/>

Custom Object Permissions

	Bank	customers	Enhancement Requests			
	Read	Create	Edit	Delete	View All	Modify All
Bank	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" 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"/>
Enhancement Requests	<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
Login attempt effective period:	15 minutes
Obfuscate secret answers for password resets:	<input type="checkbox"/>
Require a minimum 1 day password lifetime:	<input type="checkbox"/>
Don't immediately expire links to forget password emails:	<input type="checkbox"/>

Save | Save & New | Cancel

Setup Home Object Manager

Users

New User

User Edit Save Save & New Cancel

General Information

First Name	machu
Last Name	b
Alias	mb
Email	2k20cs179@kotek.ac.in
Username	2k20cs179
Nickname	User189618642426654192
Title	worker
Company	kot bank
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   
WMC User   
Data.com User Type -None-  
Data.com Monthly Addition Limit Default Level (1000)  
Accessibility Mode (Classic Only)   
High Contrast Palette on Charts   
Load Lightning Pages While Scrolling   
Debug Mode

Help for this Page

Setup Home Object Manager

Users

New User

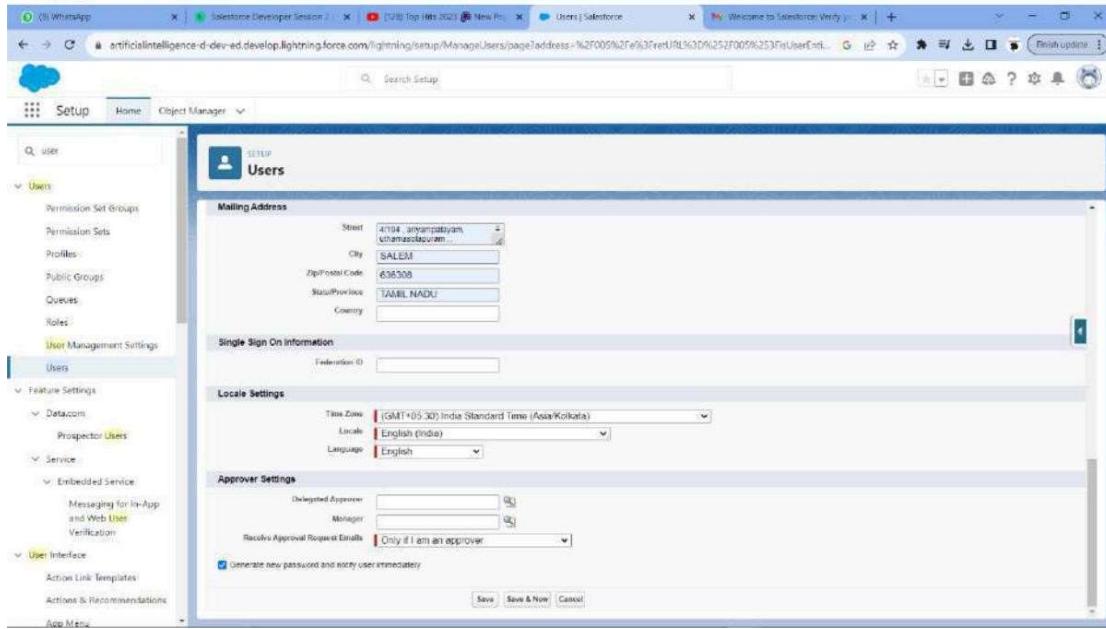
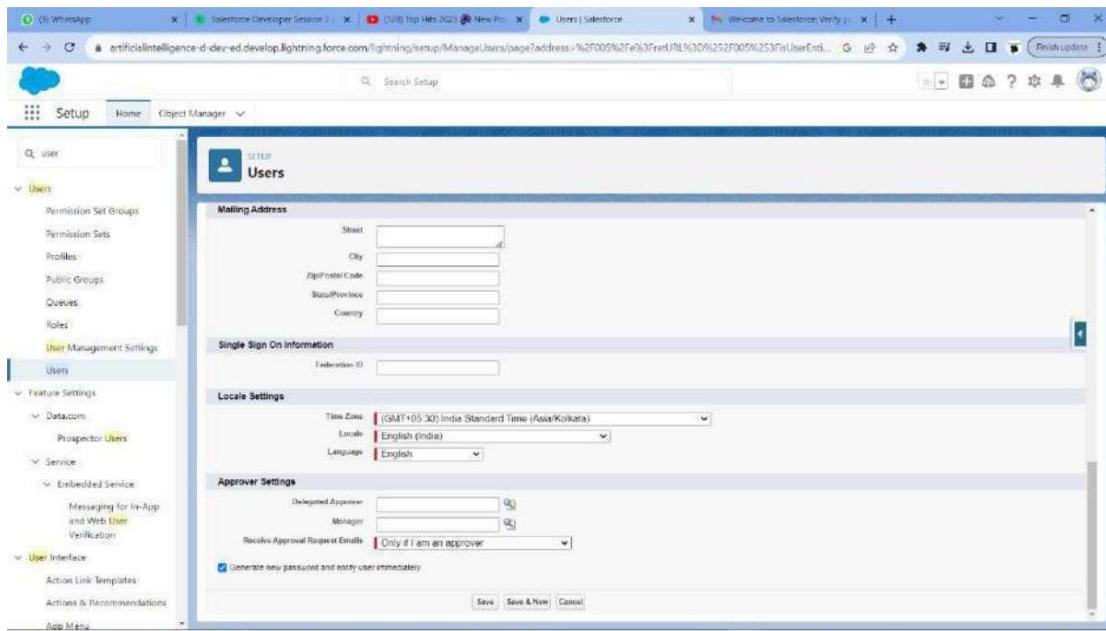
User Edit Save Save & New Cancel

General Information

First Name	machu
Last Name	b
Alias	mb
Email	2k20cs179@kotek.ac.in
Username	2k20cs179
Nickname	User189618642426654192
Title	worker
Company	kot bank
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   
WMC User   
Data.com User Type -None-  
Data.com Monthly Addition Limit Default Level (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 overlapping browser windows. The top window is the Salesforce Setup interface, specifically the 'Users' section. It shows a user record for 'madhu b'. The user details include:

- Name: madhu b
- Email: 2k20csit25@kcot.ac.in
- Username: 2k20csit25@kcot.ac.in
- Nickname: User16916424235419209
- Title: worker
- Company: kcot bank
- Department: Sales
- Address: 4101, Anna Nagar, Uthamapalayam, Uthamapalayam, Tamil Nadu - 623008
- Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata)
- Locale: English (India)
- Language: English
- Delegated Approver: None
- Manager: None
- Receive Approval Request Emails: Only if I'm an approver
- Feedback ID: None
- App Registration One-Time Password: None
- Authenticator: None

The bottom window is a Gmail inbox. An incoming email from Salesforce is visible, titled 'Welcome to Salesforce!'. The email contains a verification link: <https://artificialintelligence-d-dev-ed-develop.my.salesforce.com>. The email also includes the username '2k20csit25@kcot.ac.in' and a message: 'Again, welcome to Salesforce!'.

The image displays two screenshots of a Salesforce application interface.

**Top Screenshot:** A "Change Your Password" page. The page title is "Change Your Password". It contains a form with the following fields:

- Input field: "Enter a new password for 2k20csit@klotac.in. Make sure to include at least:
  - 8 characters
  - 1 letter
  - 1 number
- Input field: "New Password" (containing "Good")
- Input field: "Confirm New Password" (containing "Good")
- Section: "Security Question"
  - Question: "In what city were you born?"
  - Answer: "India"
- Button: "Change Password"

A note at the bottom states: "Password was last changed on 01/10/2023, 7:26 pm."

**Bottom Screenshot:** A "Recently Viewed" page for the "Bank" object. The page title is "Recently Viewed". The content area shows the following:

- Section header: "Bank Recently Viewed" with a dropdown arrow.
- Text: "0 items • Updated a few seconds ago."
- Search bar: "Search..."
- Table header: "Bank Name" (with columns for Name, Type, Status, and Last Modified).
- Text: "You haven't viewed any Bank recently.  
Try switching list views."
- Buttons: "Now", "List View", and "Card View".

Recently Viewed | customers

MECW

meow Rank customers Home

customer's Recently Viewed

0 items • Updated a few seconds ago

customer Name

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

List View

Setup Home Object Manager

Q user

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Permission Sets

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

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

All Permission Sets

Action	Permission Set Label	Description	Users
<input type="checkbox"/>	Core	Access to Activities	365 Buyer Permission Set One Seat
<input type="checkbox"/>	Core	Buyer	Includes all Buyer capabilities, and allows access to manage carts in Commerce Cloud.
<input type="checkbox"/>	Core	Buyer Manager	Connects the user to a specific account or Service Cloud site.
<input type="checkbox"/>	Core	CMA User	
<input type="checkbox"/>	Core	Commerce Admin	Allows access to commerce admin features.
<input type="checkbox"/>	Core	Contact Center Admin	Manage Service Cloud Voice contact centers that use Amazon Connect.
<input type="checkbox"/>	Core	Contact Center Agent	Access agent features in Service Cloud Voice contact centers that use Amazon Connect.
<input type="checkbox"/>	Core	Contact Center Supervisor	Access supervisor features in Service Cloud Voice contact centers that use Amazon Connect.
<input type="checkbox"/>	Core	Customer Profile Manager	
<input type="checkbox"/>	Core	Facility Manager	Lets users create, read, edit, and delete locations, sublocations, spaces, and rooms.
<input type="checkbox"/>	Core	Field Service Mobile	Give your mobile workforce access to the Field Service mobile app.
<input type="checkbox"/>	Core	Commerce Merchandise User Permission Set License Seat	Allow access to commerce merchandising features.
<input type="checkbox"/>	Core	Merchandise	Read Access to all entities managed by Order Management.
<input type="checkbox"/>	Core	Order Management Agent	Access to all features shared by Order Management.
<input type="checkbox"/>	Core	Order Management One-Off Order Manager	Lightning Order Management User
<input type="checkbox"/>	Core	Order Management Shipment	Limited access to Order Management features for Self Service.

1-25 of 29 | 0 Second(s)

44 Positions Next ►

Page 1 of 2

[https://artificialintelligence-d-dev-ed.lightning.force.com/lightning/c/customer/\\_c/0/filterName=Recent](https://artificialintelligence-d-dev-ed.lightning.force.com/lightning/c/customer/_c/0/filterName=Recent)

## Step 2:

### Permission Sets:

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

### Object-Level Security:

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

### Record-Level Security:

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

### Ownership:

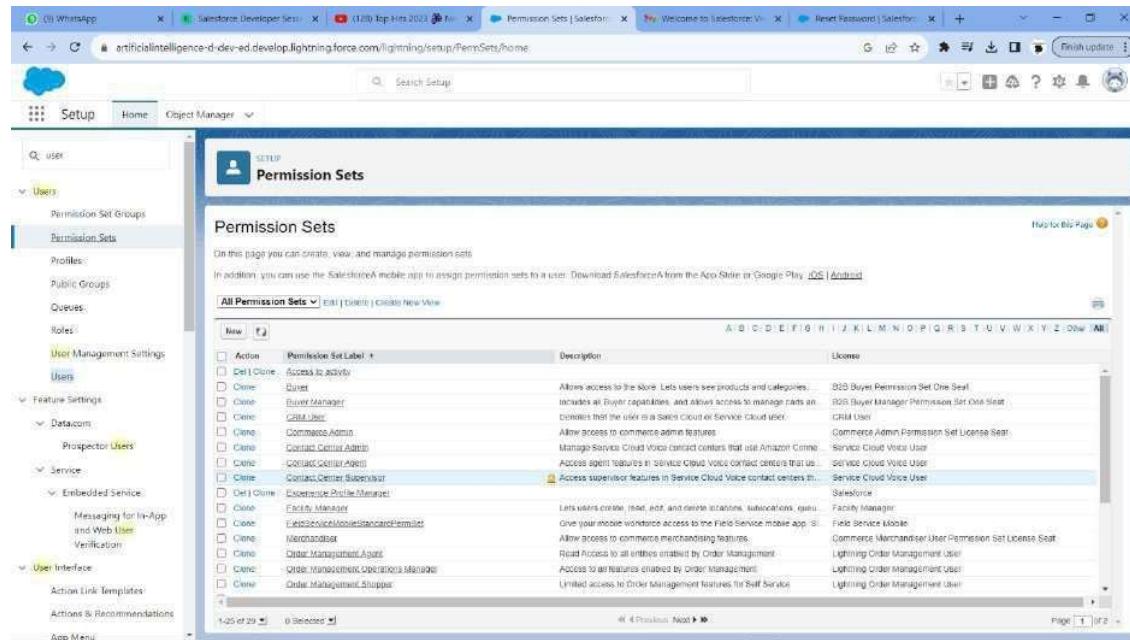
- Ensure that the Account records are owned by the respective users, with User A owning their records and User B owning their records.

## Organization-Wide Defaults:

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

## Testing:

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



The screenshot shows the Salesforce Setup interface with the 'Permission Sets' page open. The left sidebar is collapsed, and the main content area displays a table of permission sets. The table columns are 'Action', 'Permission Set Label', 'Description', and 'Users'. The 'Permission Set Label' column includes links for 'Edit' and 'Delete'. The 'Description' column provides a brief overview of the permissions granted by each set. The 'Users' column lists the specific user profiles assigned to each permission set. The table has 29 rows, with the 1st, 2nd, 3rd, 10th, 11th, 12th, 13th, 14th, 15th, 16th, 17th, 18th, 19th, 20th, 21st, 22nd, 23rd, 24th, 25th, 26th, 27th, 28th, and 29th rows visible.

Action	Permission Set Label	Description	Users
<input type="checkbox"/>	Access to activity		
<input type="checkbox"/>	User	Allows access to the store. Lets users see products and categories, includes all buyer capabilities, and allows access to manage items and themes from the user in a Sales Cloud or Service Cloud user.	B2B Buyer Permission Set One Seat B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/>	Buyer Manager		CRM User
<input type="checkbox"/>	CRM User	Allow access to commerce admin features.	Commerce Admin Permission Set License Seat
<input type="checkbox"/>	Commerce Admin	Manage Service Cloud Voice contact centers that use Amazon 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"/>	Executive Profile Manager	Lets users create, edit, and delete instances, subaccounts, and give your mobile workforce access to the Field Service mobile app.	Facility Manager Field Service Mobile
<input type="checkbox"/>	Executive Profile Manager	Allow access to commerce merchandising features.	Commerce Merchandise User Permission Set License Seat
<input type="checkbox"/>	Merchandise	Read Access to all entities enabled by Order Management.	Lightning Order Management User
<input type="checkbox"/>	Order Management Agent	Access to all features enabled by Order Management.	Lightning Order Management User
<input type="checkbox"/>	Order Management Operations Manager	United access to Order Management features in Self Service.	Lightning Order Management User
<input type="checkbox"/>	Order Management Shopper		

Two screenshots of the Salesforce Setup interface showing the creation of a new Permission Set.

**Screenshot 1:** The first screenshot shows the initial "Enter permission set information" step. The "Label" field contains "SalesManager", the "API Name" field contains "SalesManager", and the "Description" field is empty. The "Session Activation Required" checkbox is unchecked. Below this, the "Select the type of users who will use this permission set" section is visible, with the note: "Who will use this permission set?". It lists three options: "Choose -None- if you plan to assign this permission set to multiple users with different user and permission set licenses.", "Choose -One- if you want users with only one license type to use this permission set.", and "Choose a specific permission set license if you want this permission set license auto-assigned with the permission set." A note at the bottom says "Not sure what a permission set license is? Learn more [link].".

**Screenshot 2:** The second screenshot shows the same "Enter permission set information" step, but with the "Label" field now containing "salesmanager" and the "API Name" field containing "salesmanager". The "Description" field is still empty. The "Session Activation Required" checkbox is still unchecked. The "Select the type of users who will use this permission set" section is also present, identical to the first screenshot.

Two screenshots of the Salesforce Setup interface showing the 'Permission Sets' page.

**Screenshot 1: Permission Set Overview**

The 'Permission Sets' page displays the details for the permission set 'salesmanager'. The 'Permission Set Overview' section shows:

- Description: salesmanager
- License: Standard
- Session Activation Required: No
- Last Modified By: QMALS (01-Nov-2023, 7:29 pm)
- API Name: salesmanager
- Namespace Prefix: None
- Created By: QMALS (01-Nov-2023, 7:29 pm)

The 'Apps' section lists various app-related permissions:

- Assigned Apps: Settings that specify which apps are visible in the app menu.
- Assigned Connected Apps: Settings that specify which connected apps are visible in the app menu.
- Object Settings: Permissions to access objects and fields, and settings such as tab availability.
- Ajax Permissions: Permissions to perform app-specific actions, such as "Handle Car Centers".
- Ajax Class Access: Permission to execute Apex classes.
- Visualforce Page Access: Permission to execute Visualforce pages.
- External Data Source Access: Permissions to authenticate against external data sources.
- File Access: Permissions to view file types.

**Screenshot 2: Object Settings**

The 'Object Settings' section of the 'Object Settings' page for the 'salesmanager' permission set shows the following table:

Object Name	Object Permissions	Total Fields	Tab Settings
Account	No Access	40	—
AI Insights Reasons	No Access	—	—
AI Record Insights	No Access	—	—
ASSIGNING PAYMENT METHODS	No ACCESS	27	—
AEI Activity Event Stores	No Access	—	—
Analytics Query Requests	No Access	—	—
Application License Assessments	No Access	—	—
Appointment Categories	No Access	3	—
Appointment Instances	No Access	17	—
Appointment Invitations	—	4	—
Appointment Scenario Assignments	No Access	—	—
Appointment Scenario Logs	No Access	—	—
Appointment Time Slots	No Access	6	—
Asset Actions	No Access	50	—
Asset Action Sources	No Access	18	—
Asset Recipients	—	10	—
Assets	No Access	42	—
Asset Status Records	No Access	11	—

Salesforce Developer Setup

Permission Sets | Salesforce

https://artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2F0PS500000Pho&sfEntityPermissions%26o%3D...

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Permission Set Groups

Permission Sets

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Object Manager

Search Setup

Permission Set

**salesmanager**

Find Settings Close Delete Edit Properties Manage Assignments

Permission Set Owner: QuesLettuce Bank

Bank

Tab Settings

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

Object Permissions

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

Value Tutorial Help for this Page

Salesforce Developer Setup

Permission Sets | Salesforce

https://artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2F0PS500000Pho&sfEntityPermissions%26o%3D...

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Search Setup

Permission Set

**salesmanager**

Find Settings Close Delete Edit Properties Manage Assignments

Permission Set Owner: QuesLettuce Bank

Bank

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 type="checkbox"/>
Created By	<input type="checkbox"/>	<input type="checkbox"/>
Last Modified By	<input type="checkbox"/>	<input type="checkbox"/>

Value Tutorial Help for this Page

Screenshot of the Salesforce Setup interface showing the creation of a new Permission Set.

The top window shows the "Permission Sets | Salesforce" page for a new permission set named "salesmanager". The sidebar navigation includes:

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

Setup Home Object Manager

Select an Expiration Option For Assigned Users

No expiration date.

Specify the expiration date.

1 Day 1 Week 30 Days 60 Days Custom Date

Time Zone Select a time zone...

Selected Users

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

Cancel Back Assign

1 assignments were successful.

PROMOTIONAL SET SALESMANAGER

Assignment Summary

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

Done

Q user

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Service

Embedded Service

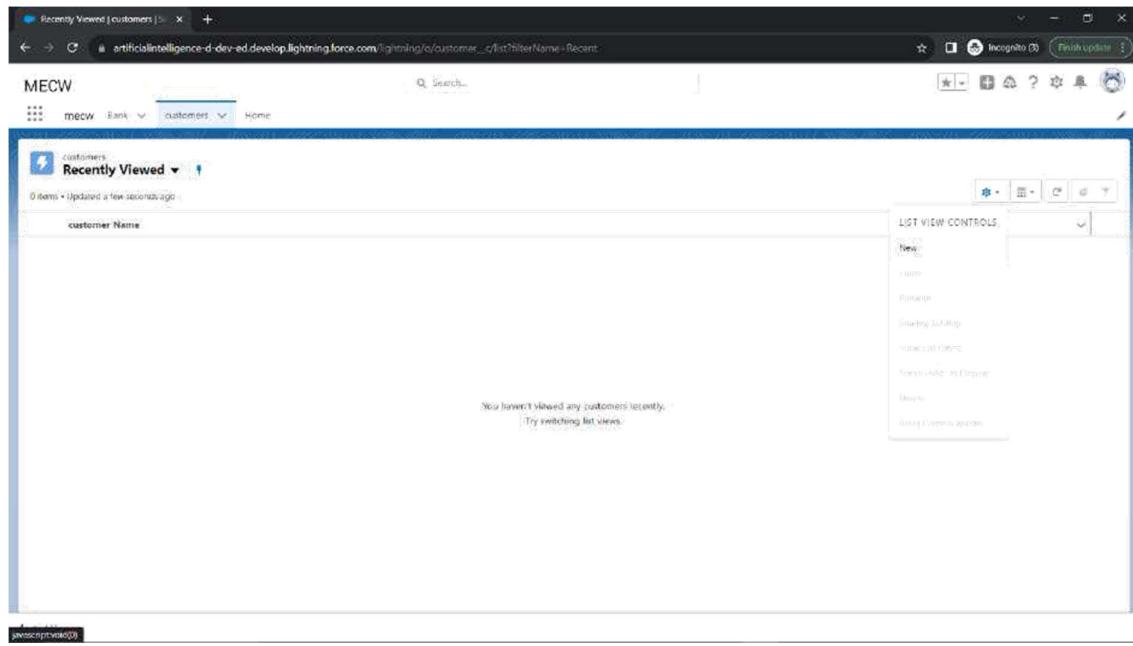
Messaging for In-App and Web User Verification

User Interface

Action Link Templates

Actions & Recommendations

App Menu

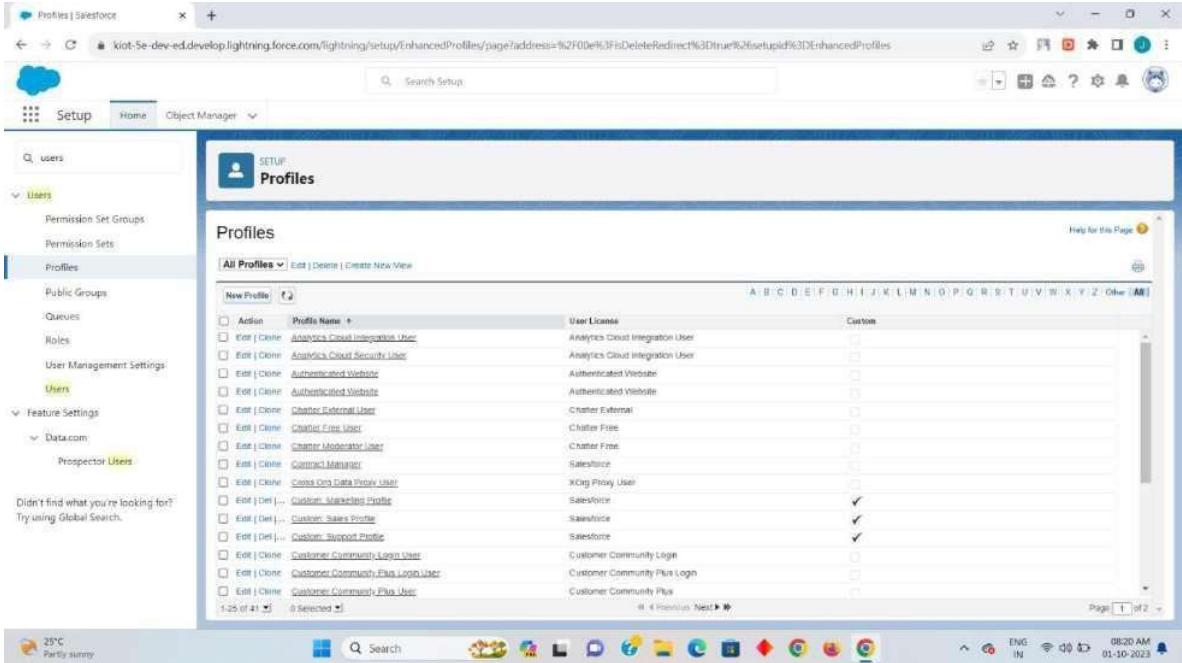


**3. . Suppose there are 2 Users and they are having Create, Read, Edit access on Account Object with the same profile but we want to open up the access for one user to delete how will you implement the Security setting.**

**Solution:**

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

### Setup-quick search[profile]

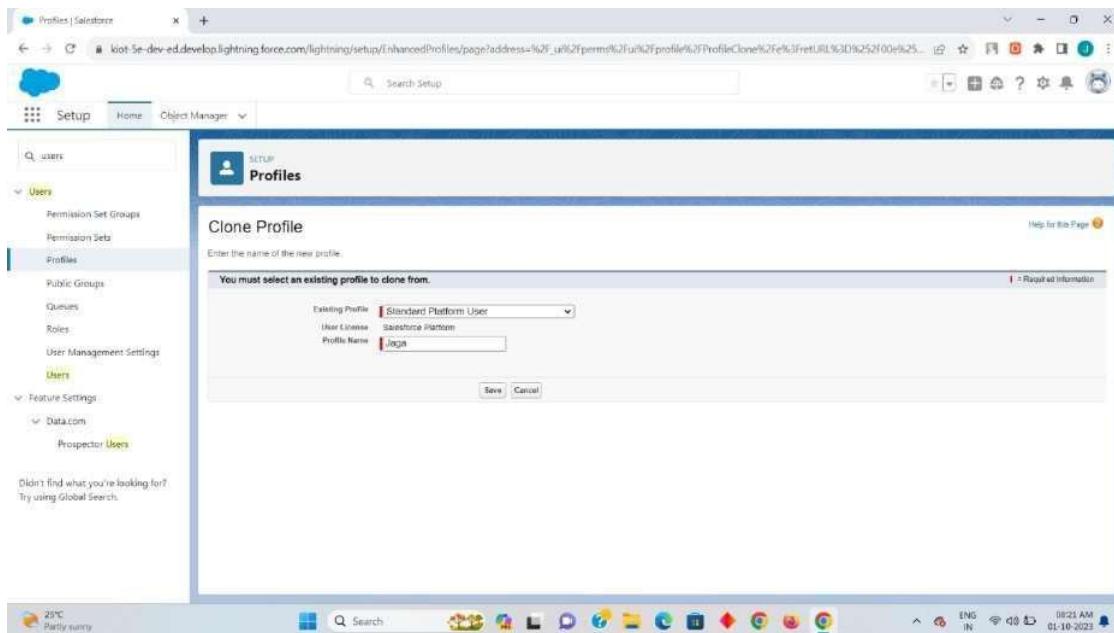


The screenshot shows the Salesforce Setup interface with the following details:

- Page Header:** Profiles | Salesforce
- Search Bar:** Search Setup
- Left Navigation:** Setup, Home, Object Manager, Q users, Users (selected), Permission Set Groups, Permission Sets, Profiles (selected), Public Groups, Queues, Roles, User Management Settings, Users, Feature Settings, Data.com, Prospector Users.
- Message:** Didn't find what you're looking for? Try using Global Search.
- Current Page:** Profiles
- Table Headers:** Action, Profile Name, User License, Custom
- Table Data:** A list of profiles including:
  - Edit | Create: Analytics Cloud Integration User (User License: Analytics Cloud Integration User)
  - Edit | Create: Analytics Cloud Security User (User License: Analytics Cloud Integration User)
  - Edit | Create: Authenticated Website (User License: Authenticated Website)
  - Edit | Create: Authenticated Website (User License: Authenticated Website)
  - Edit | Create: Chatter External (User License: Chatter External)
  - Edit | Create: Chatter Free User (User License: Chatter Free)
  - Edit | Create: Chatter Moderator User (User License: Chatter Free)
  - Edit | Create: Community Manager (User License: SalesForce)
  - Edit | Create: Cross-Org Data Proxy User (User License: XOrg Proxy User)
  - Edit | Create: Customer Interacted Profile (User License: SalesForce)
  - Edit | Create: Customer Sales Profile (User License: SalesForce)
  - Edit | Create: Customer Support Profile (User License: SalesForce)
  - Edit | Create: Customer Community Logon User (User License: Customer Community Logon)
  - Edit | Create: Customer Community Plus Logon User (User License: Customer Community Plus Logon)
  - Edit | Create: Customer Community Plus User (User License: Customer Community Plus)
- Pagination:** 1-25 of 41, 0 Selected, Page 1 of 2
- System Status:** 25°C Partly sunny
- System Icons:** Search, Home, Object Manager, etc.
- Page Footer:** ENG IN, 0820 AM, 01-10-2023

## Step 2:

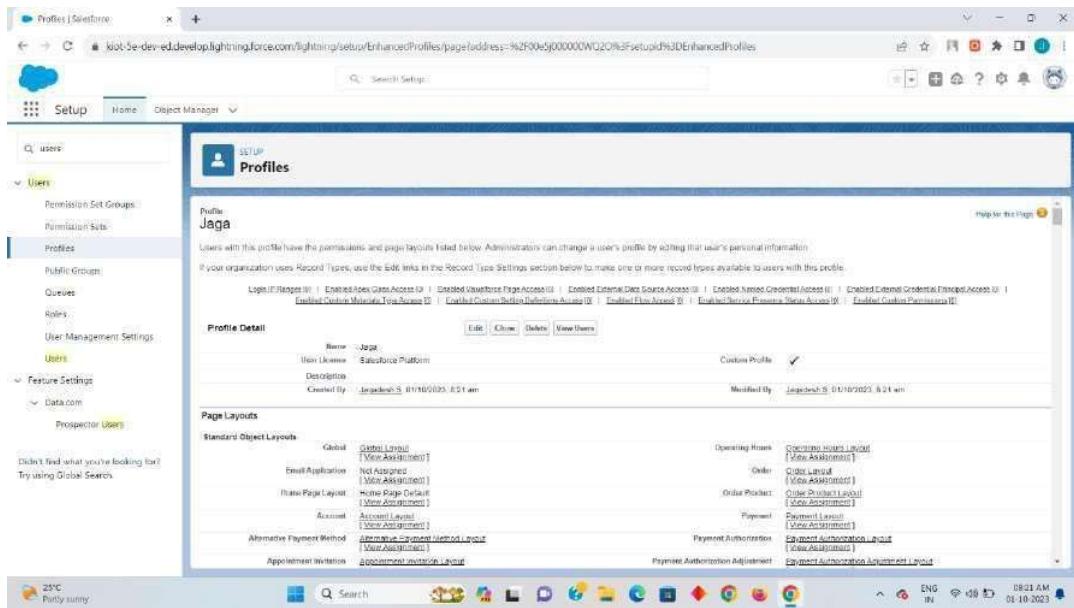
Click on the new to create a new profile along with the label and Api



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

## Step 3:

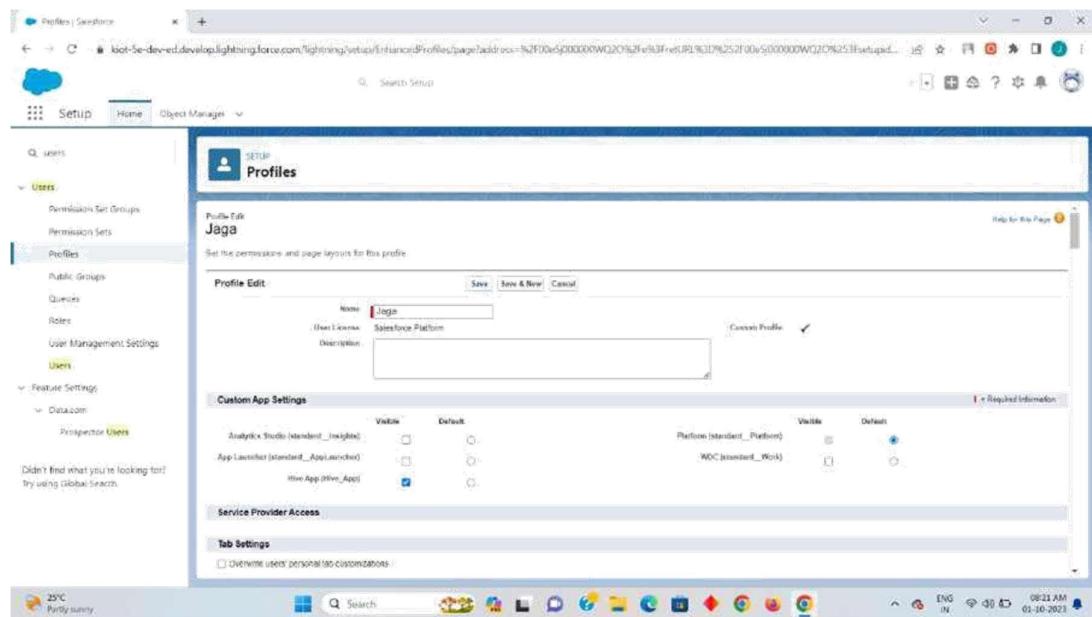
Now click on the edit and scroll down to custom object settings and enable the read,create,edit and view options. After that click on save.



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

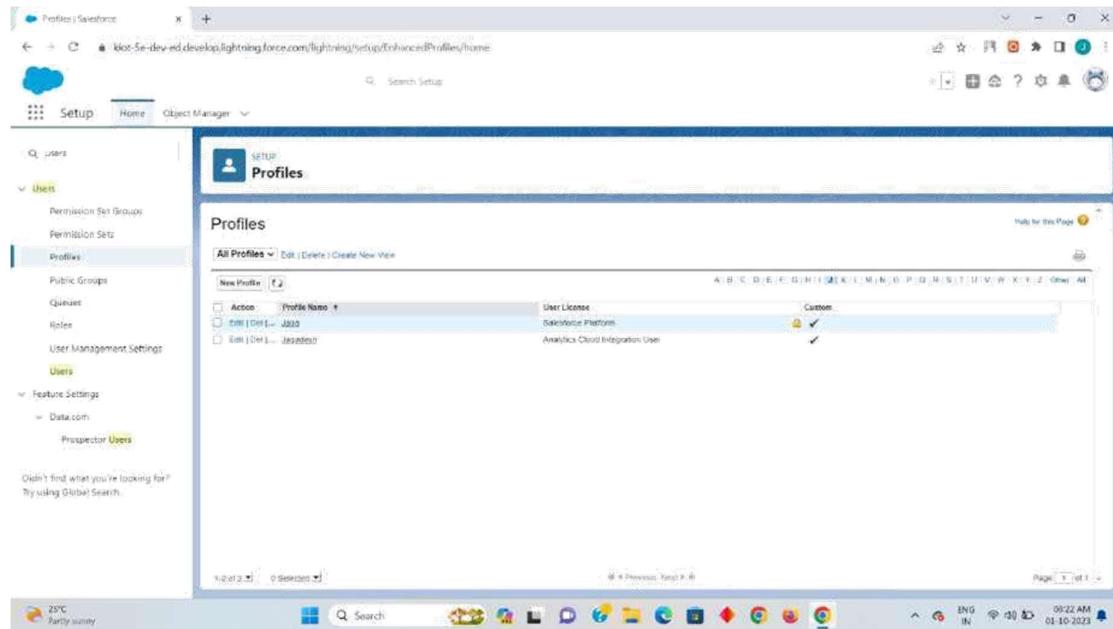
- Page Header:** kiot-5e-dev.lightning.force.com/lightning/setup/EnhancedProfiles/page?adde... (partially visible)
- Search Bar:** Search Setup
- Top Navigation:** Setup, Home, Object Manager
- Left Sidebar:** Users (selected), Permission Set Groups, Permission Sets, Profiles (selected), Public Groups, Quotas, Roles, User Management Settings, Users, Feature Settings, Data.com, Prospectors, Users.
- Content Area:**
  - Profiles Section:** Shows a grid of profiles with checkboxes for various permissions like Communication Subscriptions, Contact Point Address, Contact Point Contacts, Contact Point Details, Licenses, Party Contracts, Push Topics, Sellers, Streaming Channels, and User External Credentials.
  - Custom Object Permissions Section:** Shows permissions for Custom Object (Read, Create, Edit, Delete, View All, Modify All) across Providers and Resources.
  - Session Settings Section:** Includes Session Timeout (2 hours of inactivity), Enable different Experience Cloud sign-in policies for employees (checkboxes for Separate Experience Cloud sites and Salesforce login authentication for employees, Both login IP restrictions, and Help employees device activation during Experience Cloud site login).
  - Footer:** Didn't find what you're looking for? Try using Global Search.

The screenshot shows the Salesforce Setup interface. The left sidebar has a 'Users' section expanded, with 'Profiles' selected. The main content area is titled 'Profiles' and contains a grid of checkboxes for various permission sets across different objects like Communication Subscription Contracts, Locations, and Party Contracts. Below this is a 'Custom Object Permissions' section with tables for Providers and Resources. At the bottom is a 'Session Settings' section with options for session timeout, Experience Cloud login policies, and session security.



## 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"/> Edit	Chatter_Executor	Chatter	chatty_00050000000000000@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	Gaja_Jaga	gaja	jaca_gaja@yatra.com.cz7d2scap3@gmail.com		<input checked="" type="checkbox"/>	Customer Community User
<input type="checkbox"/> Edit	S_Jaga	gaj	lucr0205@gmail.com	CEO	<input type="checkbox"/>	Standard Platform User
<input type="checkbox"/> Edit	S_Jagadeesh	gaj	gaj@yatra.com	SP Admin	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	B_Jagadeesh	gaj	jeet1117@gmail.com	Channel Sales Team	<input type="checkbox"/>	Standard Platform User
<input type="checkbox"/> Edit	User_Information	inted	integration@00050000000000000@salesforce.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	security@00050000000000000@salesforce.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

Salesforce

Setup Home Object Manager

Q: users

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Quotas

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospect User

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

New User

User Edit Save Save & New Cancel

General Information

First Name	alexander11
Last Name	B
Alias	
Email	liver23@gmail.com
Username	liver23@gmail.com
Middle Name	User10901287544952992
Title	
Company	
Department	
Manager	

Role: Director - Channel Sales

User License: Salesforce Platform

Profile: Standard Platform User

Active: Yes

Marketing User: Standard Platform User

Office User: Standard Platform User

Handheld User: Standard Platform User

Flow User: Standard Platform User

Service Cloud User: Standard Platform User

Mobile Connector User: Standard Platform User

External Publisher User: Standard Platform User

WEC User: Standard Platform User

Relationship Type: None

Data.com Monthly Address Limit: Default Level (000)

Accessibility Mode (Classic Only): None

High-Contrast Paste on Clients: None

Save 100% 99% 98% 97% 96% 95% 94% 93% 92% 91% 90% 89% 88% 87% 86% 85% 84% 83% 82% 81% 80% 79% 78% 77% 76% 75% 74% 73% 72% 71% 70% 69% 68% 67% 66% 65% 64% 63% 62% 61% 60% 59% 58% 57% 56% 55% 54% 53% 52% 51% 50% 49% 48% 47% 46% 45% 44% 43% 42% 41% 40% 39% 38% 37% 36% 35% 34% 33% 32% 31% 30% 29% 28% 27% 26% 25% 24% 23% 22% 21% 20% 19% 18% 17% 16% 15% 14% 13% 12% 11% 10% 9% 8% 7% 6% 5% 4% 3% 2% 1%

08:21 AM 01-10-2021

Salesforce

Setup Home Object Manager

Q: users

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Quotas

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospect User

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

New User

User Edit Save Save & New Cancel

General Information

First Name	alexander22
Last Name	B
Alias	
Email	liver@gmail.com
Username	liver@gmail.com
Middle Name	User109012879983010143
Title	
Company	
Department	
Manager	

Role: Marketing Team

User License: Salesforce Platform

Profile: Standard Platform User

Active: Yes

Marketing User: Standard Platform User

Office User: Standard Platform User

Handheld User: Standard Platform User

Flow User: Standard Platform User

Service Cloud User: Standard Platform User

Mobile Connector User: Standard Platform User

External Publisher User: Standard Platform User

WEC User: Standard Platform User

Relationship Type: None

Data.com Monthly Address Limit: Default Level (000)

Accessibility Mode (Classic Only): None

High-Contrast Paste on Clients: None

Save 100% 99% 98% 97% 96% 95% 94% 93% 92% 91% 90% 89% 88% 87% 86% 85% 84% 83% 82% 81% 80% 79% 78% 77% 76% 75% 74% 73% 72% 71% 70% 69% 68% 67% 66% 65% 64% 63% 62% 61% 60% 59% 58% 57% 56% 55% 54% 53% 52% 51% 50% 49% 48% 47% 46% 45% 44% 43% 42% 41% 40% 39% 38% 37% 36% 35% 34% 33% 32% 31% 30% 29% 28% 27% 26% 25% 24% 23% 22% 21% 20% 19% 18% 17% 16% 15% 14% 13% 12% 11% 10% 9% 8% 7% 6% 5% 4% 3% 2% 1%

08:21 AM 01-10-2021

Salesforce

Setup Home Object Manager

Q: users

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Quotas

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospect User

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

All Users

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

In addition, download Salesforce to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices. OS X/Android

User: All Users Edit Create New

Action	Profile
<input type="checkbox"/> Add Full Name: Alex	Standard Platform User
<input type="checkbox"/> Add Last Name: B	Standard Platform User
<input type="checkbox"/> Add Alias: ab	Standard Platform User
<input type="checkbox"/> Add Email: ab@gmail.com	Standard Platform User
<input type="checkbox"/> Add Username: ab@gmail.com	Standard Platform User
<input checked="" type="checkbox"/> Add First Name: alexander11	Standard Platform User
<input checked="" type="checkbox"/> Add Middle Name: B	Standard Platform User
<input checked="" type="checkbox"/> Add Last Name: B	Standard Platform User
<input checked="" type="checkbox"/> Add Alias: ab	Standard Platform User
<input checked="" type="checkbox"/> Add Email: ab@gmail.com	Standard Platform User
<input checked="" type="checkbox"/> Add Username: ab@gmail.com	Standard Platform User

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 Other

Save 100% 99% 98% 97% 96% 95% 94% 93% 92% 91% 90% 89% 88% 87% 86% 85% 84% 83% 82% 81% 80% 79% 78% 77% 76% 75% 74% 73% 72% 71% 70% 69% 68% 67% 66% 65% 64% 63% 62% 61% 60% 59% 58% 57% 56% 55% 54% 53% 52% 51% 50% 49% 48% 47% 46% 45% 44% 43% 42% 41% 40% 39% 38% 37% 36% 35% 34% 33% 32% 31% 30% 29% 28% 27% 26% 25% 24% 23% 22% 21% 20% 19% 18% 17% 16% 15% 14% 13% 12% 11% 10% 9% 8% 7% 6% 5% 4% 3% 2% 1%

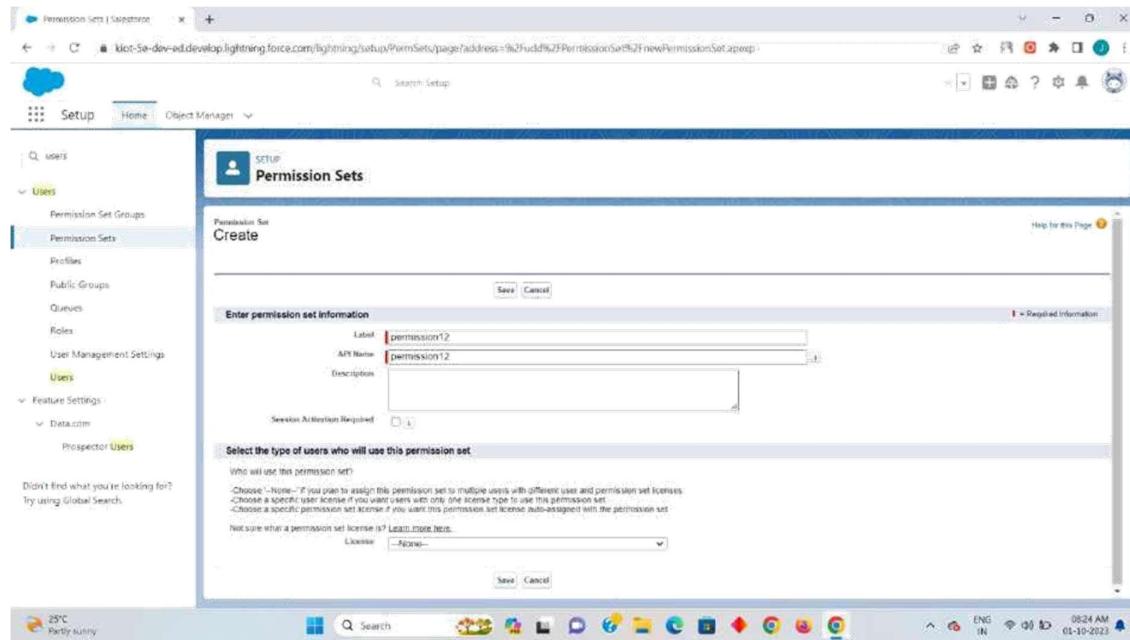
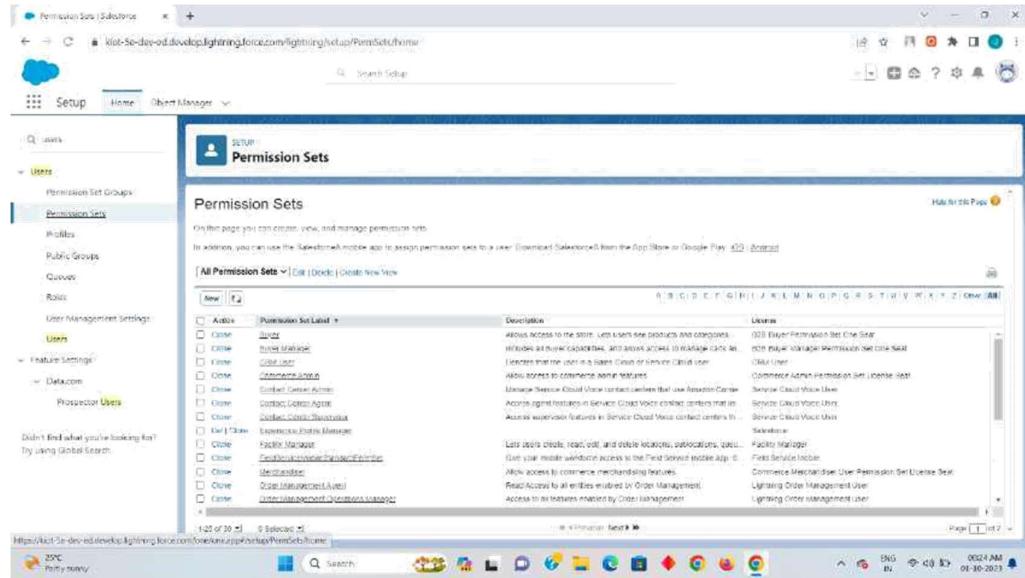
08:24 AM 01-10-2021

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

Q users

User

Permission Set Groups

Permission Sets

Profiles

Public Groups

Quotas

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

Permission Sets

permission12

PERMISSION SET OVERVIEW

Description: permission12

License: Standard

Session Activation Required: No

Last Modified By: [REDACTED] 01/10/2023, 8:24 AM

API Name: permission12

Namespace Prefix:

Created By: [REDACTED] 01/10/2023, 8:24 AM

ASSIGNED APPS

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

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

Object Settings: Permissions to access objects and fields, and settings such as tab availability.

App Permissions: Permissions to perform app-specific actions, such as Manage Call Center.

ADM CLASS ACCESS: Permissions to execute Apex classes.

Visualforce Page Access: Permissions to execute Visualforce pages.

External Data Source Access:

ENGLISH IN 08:24 AM 01-10-2023

Permission Sets | Salesforce

Setup Home Object Manager

Q users

User

Permission Set Groups

Permission Sets

Profiles

Public Groups

Quotas

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

Permission Sets

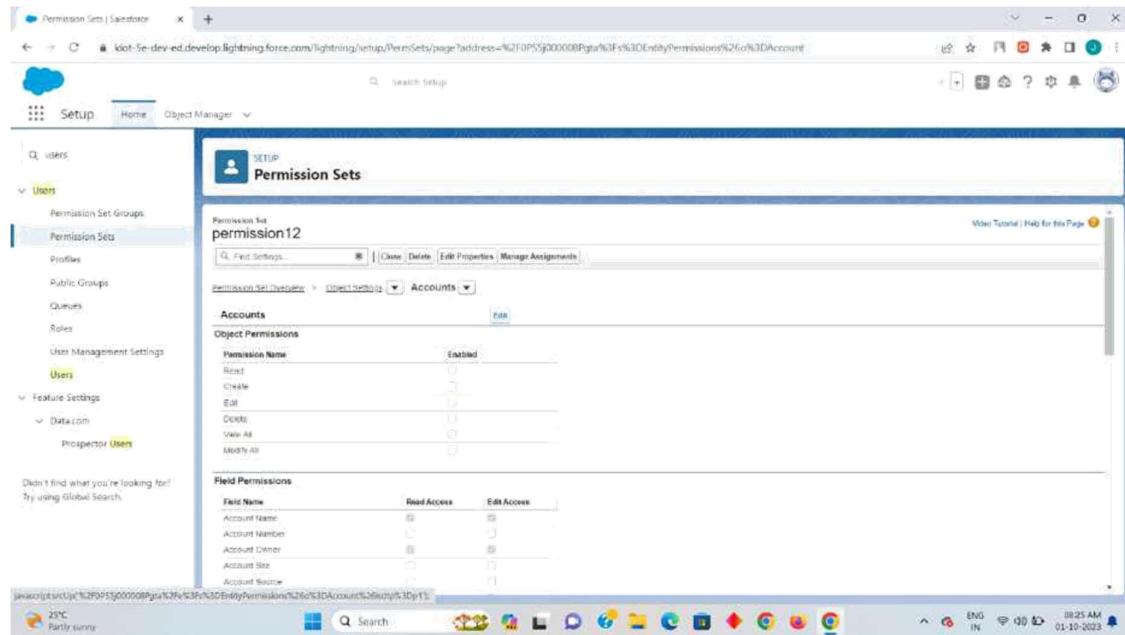
permission12

OBJECT SETTINGS

Object Name: ACCOUNT

Object Permissions	Total Fields	Tab Settings
No Access	0	—
No Access	44	—
No Access	—	—
No Access	—	—
No Access	—	—
No Access	27	—
No Access	14	—
No Access	—	—
No Access	—	—
No Access	3	—
No Access	17	—
—	4	—
No Access	—	—
No Access	—	—
No Access	5	—
No Access	30	—
No Access	18	—

ENGLISH IN 08:25 AM 01-10-2023



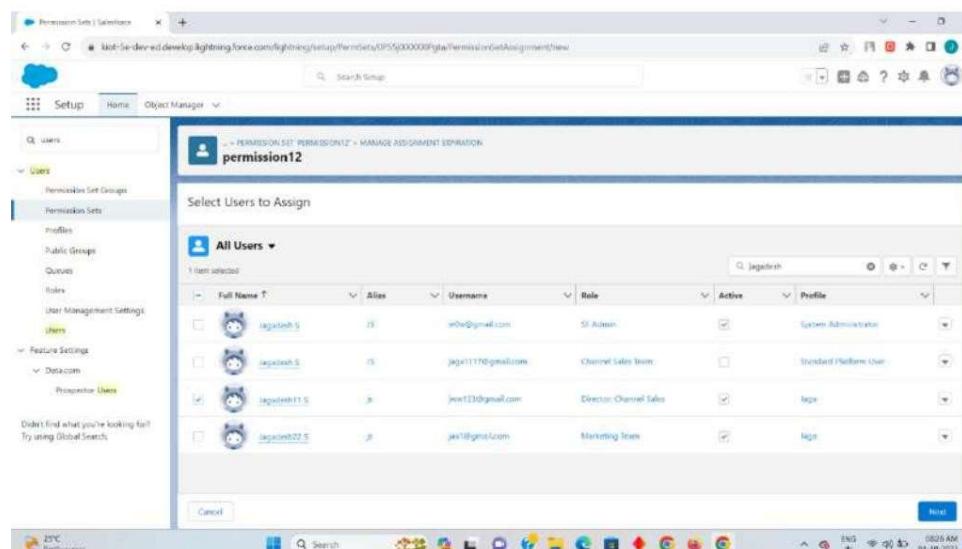
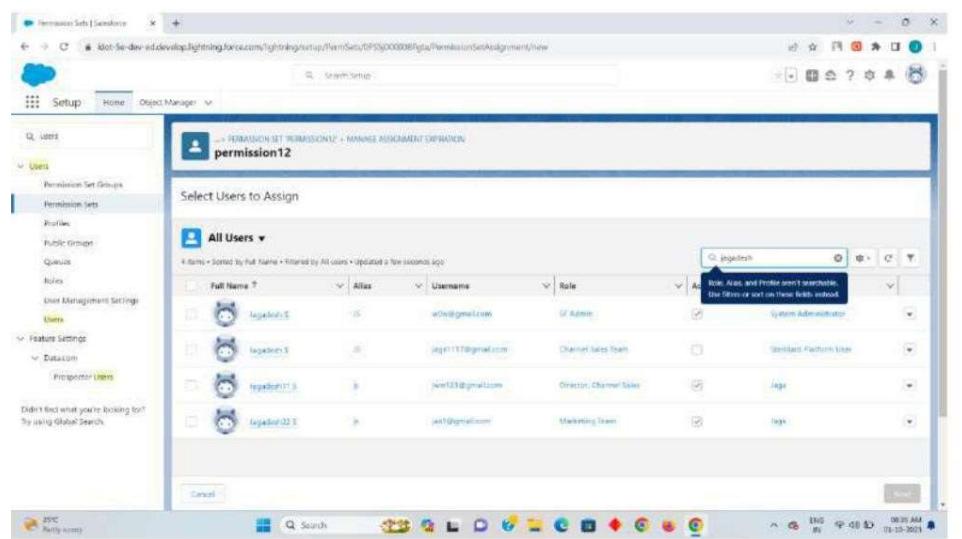
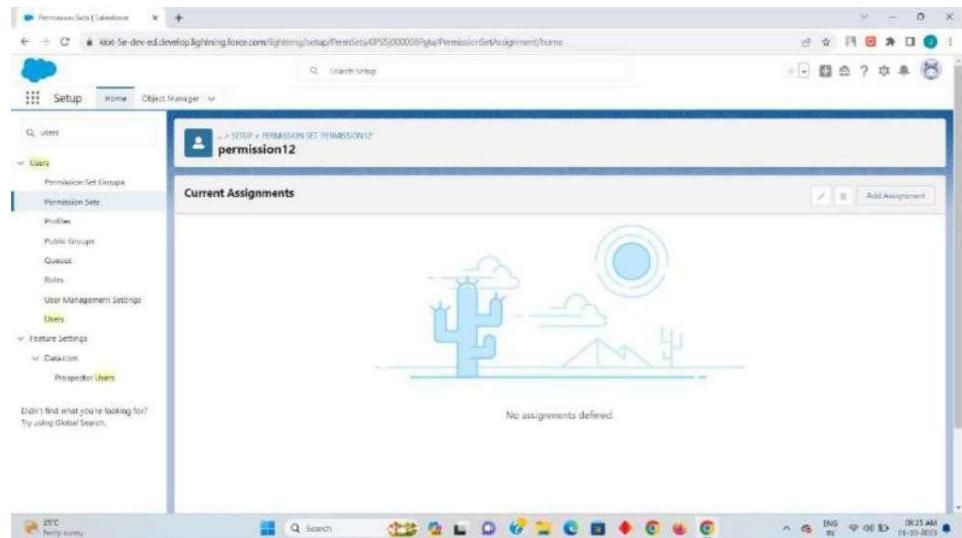
## Step 7:

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

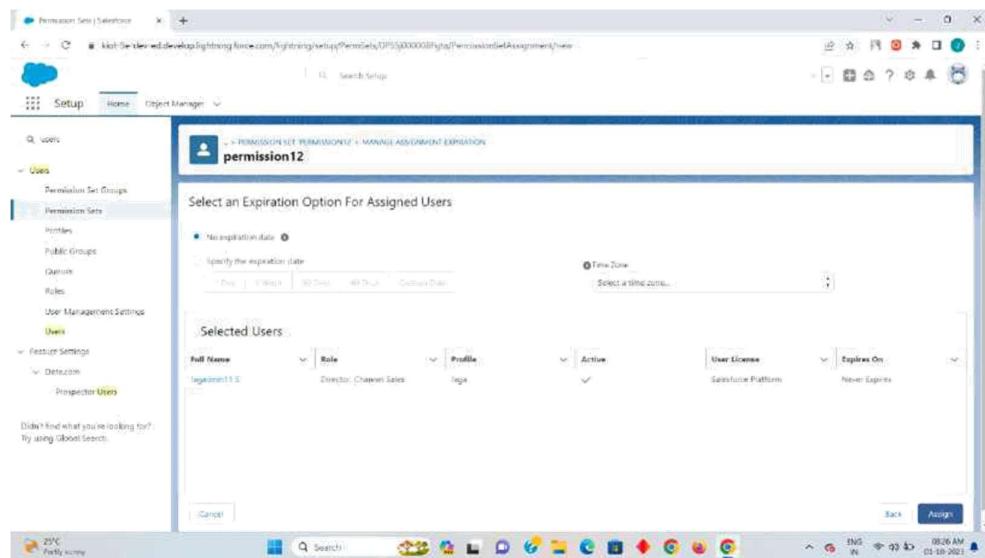
The screenshots show the 'Permission Sets' page in the Salesforce Setup. The permission set is named 'permission12'. In the 'Object Permissions' section for 'Accounts', the 'Delete' checkbox is checked. In the second screenshot, the 'Edit' button is highlighted.

## Step 8

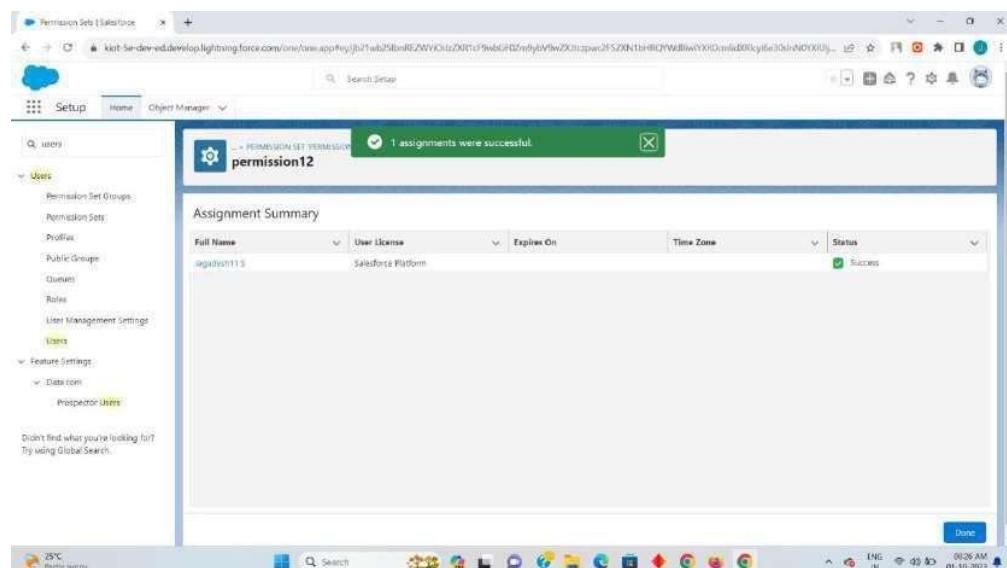
Now click on add assignment there you will find your two created users click on any one user to give a special access as delete on it and then click on assign so that the specific selected user can have a special access as delete on it.



Click on next.



Now click on Assign.



Now the specific access for the Jagadesh11 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. The template is named 'Thank You Email - Survey'. The 'Details' tab is selected. The 'Information' section includes fields for 'Email Template Name' (set to 'Thank You Email - Survey'), 'Related Entity Type' (set to 'Survey Result'), 'Description' (set to 'Public Email Templates'), and a checked checkbox for 'Made in Email Template Builder'. The 'Message Content' section contains the subject 'Thank You For Completing Our Survey!' and the HTML body:

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

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

The screenshot shows the 'Edit Email Alert' interface for a 'Survey - Thank You Email' alert. The 'Description' field is set to 'Survey - Thank You Email'. The 'Unique Name' field is 'Survey\_Thank\_You\_Email'. The 'Object' is 'Survey Result' and the 'Email Template' is 'Thank You Email - Survey'. Under 'Recipient Type', the 'Email Field' is selected. In the 'Available Recipients' list, there are three users: 'User: Integration User', 'User: Rakesh Gupta', and 'User: Security User'. The 'Selected Recipients' list is currently empty. A note at the bottom says 'You can enter up to five (5) email addresses to be notified.' Below the recipient section, there is a 'From Email Address' field containing 'Current User's email address' and a checkbox for 'Make this address the default From email address for this object's email alerts.'

**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

- One
- Multiple

How to Set the Record Fields

- Use all values from a record
- Use separate resources, and literal values

Create a Record of This Object

* Object	
Survey Result	

Set Field Values for the Survey Result

Field	Value
Comment__c	← A <sub>3</sub> Comment X
Email__c	← A <sub>3</sub> Email > Value X
Name__c	← {!Name.firstName} {!Name.lastName}
Rating__c	← A <sub>3</sub> Rating X
+ Add Field	
<input type="checkbox"/> Manually assign variables	

Cancel Done

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

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

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

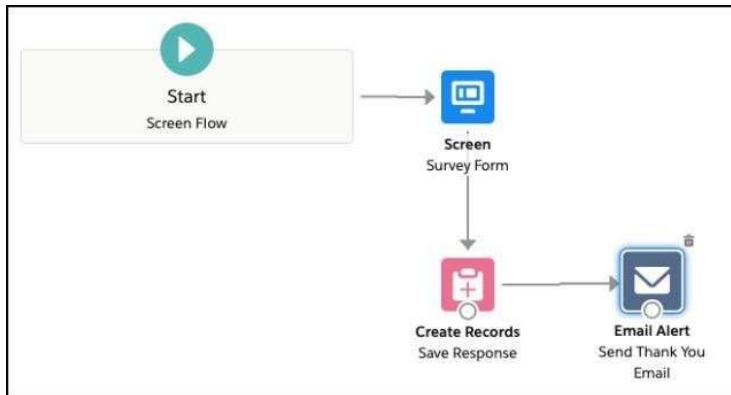
4. Clicks on the Survey – Thank You Email email alert.
5. Click Done.

Edit "Survey - Thank You Email" email alert

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

* Label	* API Name
Send Thank You Email	Send_Thank_You_Email
Description	
Set Input Values	
* Record ID {!Save_Response}	
<input type="button" value="Cancel"/> <input type="button" value="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**

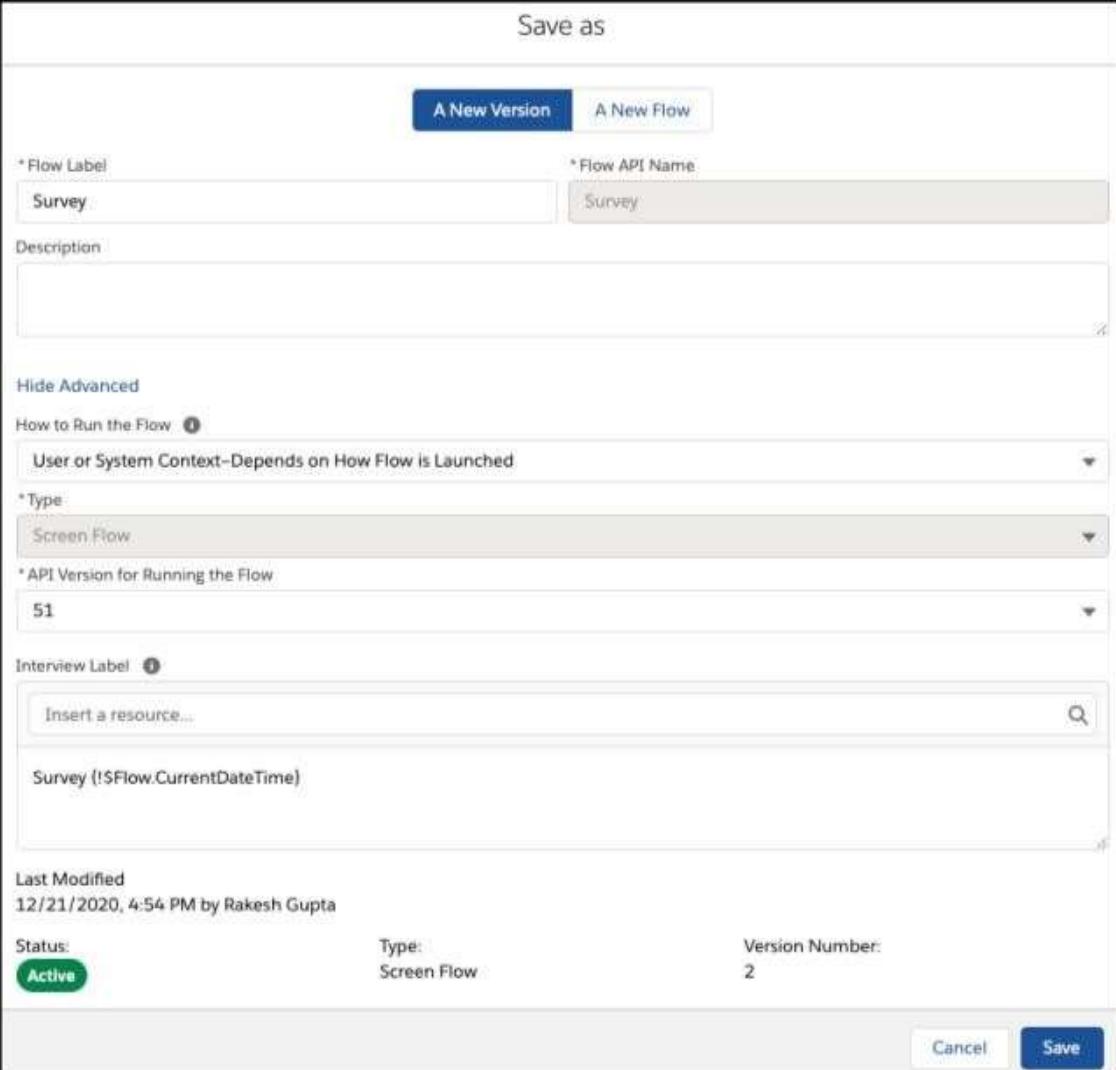
\* API Version for Running the Flow: **51**

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

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

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

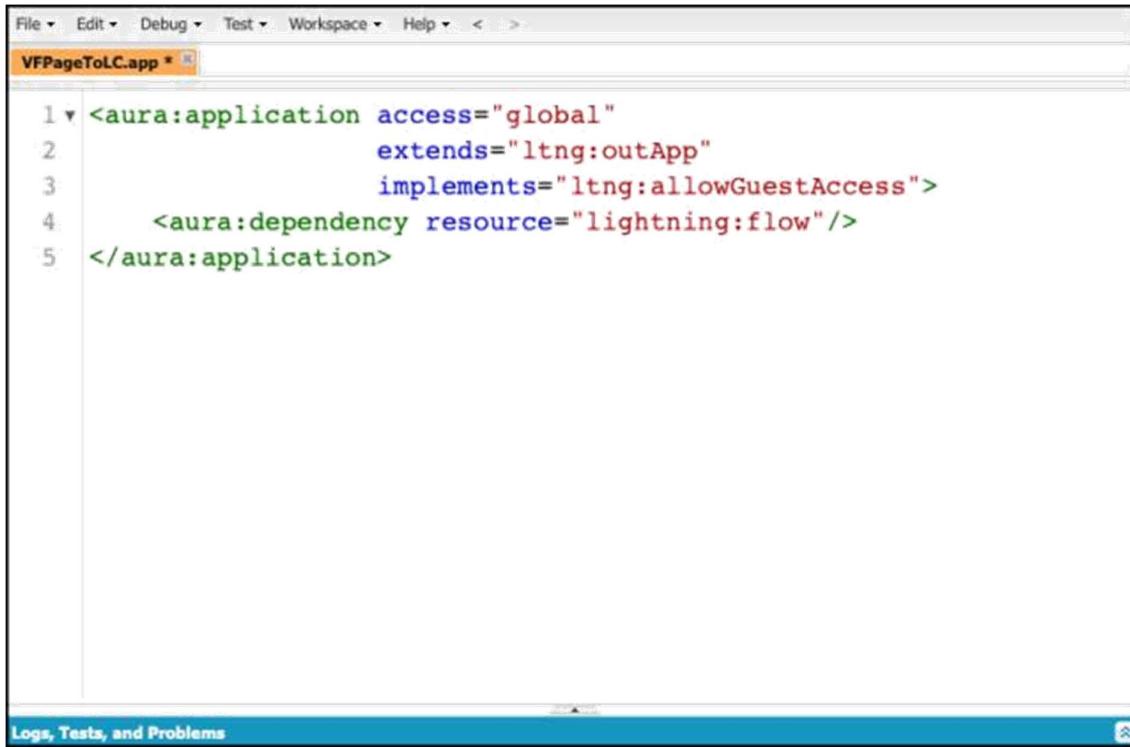
Cancel     Save



## 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 (VFPageToLC) field, make sure to select the Lightning Out Dependency App checkbox.**
- 4. Click Submit.**
- 5. Copy code from [GitHub](#) and paste it into your Lightning Application.**
- 6. Save your code.**



The screenshot shows the Salesforce IDE interface with the file 'VFPageToLC.app' open. The code editor displays the following XML:

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

The status bar at the bottom indicates '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 Visualforce Page Editor for a page named 'Survey'. The 'Page Information' section includes fields for Label ('Survey'), Name ('Survey'), and Description. It also has checkboxes for 'Available for Lightning Experience, Experience Builder and mobile app' and 'Require CSRF protection on GET requests'. The 'Visualforce Markup' tab is selected, displaying the following code:

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

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

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

1. Click **Setup**.

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

Site Edit

Save Cancel

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

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

## Proof of Concept

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

Survey

Name

First Name  
Alok

Last Name  
Sinfal

\*Email

\*Rating  
5

\*Comment  
Awesome Blog 

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](#)