

NAAN MUDHALVAN

ASSIGNMENT

on

[SALESFORCE]

CREATION OF AN APPLICATION

FOR SCHOOL MANAGEMENT

NAME – BEETRISHYA M

NM ID -

499CE409D834944BDF544E661C434ACE

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 title 'New Custom Object'. The page is titled 'New Custom Object' and includes a note about permissions being disabled for all profiles by default. It contains sections for 'Custom Object Definition Edit', 'Custom Object Information', 'Enter Record Name Label and Format', 'Optional Features', 'Object Classification', 'Deployment Status', 'Search Status', and 'Object Creation Options'. Buttons for 'Save', 'Save & New', and 'Cancel' are located at the bottom.

Custom Object Definition Edit

Custom Object Information

The singular and plural labels used in lists, page layouts, and reports:

- Label:** college (Example: Account)
- Plural Label:** colleges (Example: Accounts)
- Stems with violent sound:**

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

- Object Name:** college (Example: Account)

Description:

Context-Sensitive Help Setting:

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

Context Name:

Enter Record Name Label and Format

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

- Record Name:** college Name (Example: Account Name)
- Date Type:**

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. Learn more.

- 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. Learn more.

- Allow Search

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

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

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

The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. A 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**: Checkboxes:
 - 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. Learn more:
 - Allow Sharding
 - Allow Bulk API Access
 - Allow Streaming API Access
- Deployment Status**: Radio buttons:
 - In Development
 - Deployed
- Search Status**: When this setting is enabled, your users can find records of this object type when they search. Learn more:
 - Allow Search
- Object Creation Options (Available only when custom object is first created)**: Checkboxes:
 - 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.

Setup | Home | Object Manager

SETUP > OBJECT MANAGER
CDepartment

Details **Details** Edit Delete

Fields & Relationships

Description

API Name: CDepartment__c
Custom
Singular Label: CDepartment
Plural Label: CDepartments

Tracked Reports

Track Activities

Track Field History

Deployment Status
Deployed
Help Setting: Standard salesforce.com Help Window

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

Setup | Home | Object Manager

SETUP > OBJECT MANAGER
CDepartment

Details **New Relationship** Help for this Page Step 3 of 6

Fields & Relationships

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

Field Label: college
Field Name: college
Description:
Help Text:

Child Relationship Name: CDepartments
Sharing Setting:
 Read Only: Allows users with at least Read access to the Master record to create, edit, or delete related Detail records.
 ReadWrite: Allows users with at least ReadWrite access to the Master record to create, edit, or delete related Detail records.

Allow re-parenting: Child records can be re-parented to other parent records after they are created.
Auto add to existing report type: Add this field to existing custom report types that contain this entry.

Lookup Filter

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 table:

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: 'Rename Tabs and Labels' (selected), 'Tabs', and 'Custom Tabs'. A message at the top of the main content area says 'Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'Custom Tabs' and contains a section for 'Custom Object Tabs'. It shows three tabs: 'Books' (Tab Style: Dark), 'Research_Proposal' (Tab Style: Separated), and 'Solved' (Tab Style: Dark). Below this are sections for 'Web Tabs', 'Visualforce Tabs', 'Lightning Component Tabs', and 'Lightning Page Tabs', each with a 'New | What is This?' link.

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 is part of the 'college' object setup. On the left, a sidebar lists various field-related sections: '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 current step is 'Step 5: Add to page layouts' (Step 5 of 5). The form shows a field labeled 'Total count' with 'Data Type: Record Summary' and 'Field Name: Total_count'. There is a note: '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 are two checkboxes: 'Add Field' (selected) and 'Page Layout Name' (selected). A note below says: 'When finished, click Save & New to create more custom fields, or click Save if you are done.' At the bottom right are 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 security configuration table lists various user profiles and their access levels:

User 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 Access 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 Registration User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

The screenshot shows the Salesforce setup interface for defining the summary calculation for the "Total count" field. The "Master Object" is set to "college" and the "Summarized Object" is set to "Departments". The "Select Roll-Up Type" section shows "COUNT" selected. 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.

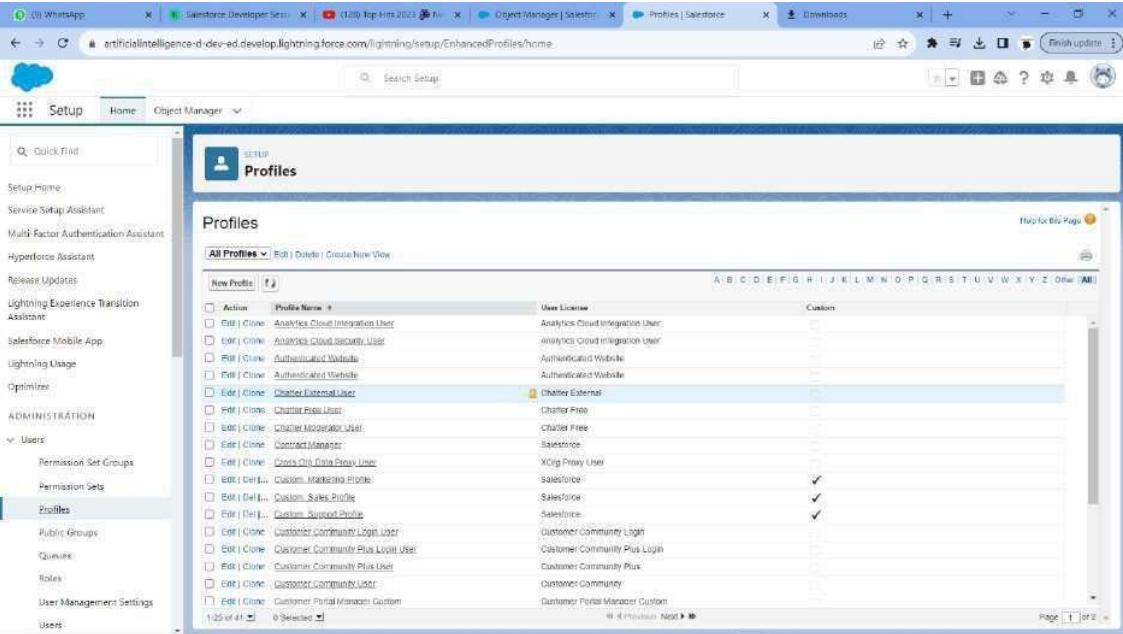
11. Test the app with the assigned users.

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"/>	Edit Clone Analytics Cloud Integration User	Analytics Cloud Integration User	
<input type="checkbox"/>	Edit Clone Analytics Cloud Security User	Analytics Cloud Integration User	
<input type="checkbox"/>	Edit Clone Authenticated Website	Authenticated Website	
<input type="checkbox"/>	Edit Clone Authenticated Website	Authenticated Website	
<input type="checkbox"/>	Edit Clone Charter External User	Charter External	
<input type="checkbox"/>	Edit Clone Charter Free User	Charter Free	
<input type="checkbox"/>	Edit Clone Charter Moderator User	Charter Free	
<input type="checkbox"/>	Edit Clone Contact Manager	Salesforce	
<input type="checkbox"/>	Edit Clone Cross Org Data Proxy User	XOrg Proxy User	
<input type="checkbox"/>	Edit Clone Custom Marketing Profile	Salesforce	✓
<input type="checkbox"/>	Edit Clone Custom Sales Profile	Salesforce	✓
<input type="checkbox"/>	Edit Clone Customer Support Profile	Salesforce	✓
<input type="checkbox"/>	Edit Clone Customer Community Login User	Customer Community Login	
<input type="checkbox"/>	Edit Clone Customer Community Plus Login User	Customer Community Plus Login	
<input type="checkbox"/>	Edit Clone Customer Community Plus User	Customer Community Plus	
<input type="checkbox"/>	Edit Clone Customer Community User	Customer Community	
<input type="checkbox"/>	Edit Clone 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

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]

The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected under the 'Users' category in the left sidebar. The main content area displays the 'Manager' screen for editing a profile named 'Manager'. The profile details include the name 'Manager', user type 'Salesforce Platform', and a description field. The 'Custom App Settings' section shows settings for Analytics Studio, App Launcher, and WIKI. The 'Service Provider Access' section includes tab settings for Accounts and Contacts. The 'Communication Subscription Channel Types' section lists various communication methods like SMS, Email, and Webhooks, each with checkboxes for different user categories. The 'Custom Object Permissions' section shows permissions for custom objects like 'Bank' and 'Customers' across various standard Salesforce objects. The 'Session Settings' section includes session timeout and security level configuration. The 'Password Policies' section defines password expiration, history, and minimum length requirements.

Salesforce Developer Set... | 11:20 AM Fri 2023 | Object Manager | Salesforce | Profiles | Salesforce | Downloads | +

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

Profiles

Contact Point Addresses Contact Point Consents Contact Point Emails

Custom Object Permissions

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

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

Password Policies

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

Salesforce Developer Set... | 11:20 AM Fri 2023 | Object Manager | Salesforce | Profiles | Salesforce | Downloads | +

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

Profiles

Contact Point Addresses Contact Point Consents Contact Point Emails

Custom Object Permissions

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

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

Password Policies

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

Disclose secret answers for password recovery:
Require a minimum 1 day password lifetime:
Don't immediately expire Banks in forget password emails:

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"/> Edit Login	Alexandra.Doe	alex	test_cwe_cas_b0ff1c9f8a92fb0e9a3d10ffcc9a52e9@mail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	HR User
<input type="checkbox"/> Edit	Charlie.Frost	charlie	charlie000000000000000000000000000000@mail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Charlie Free User
<input type="checkbox"/> Edit Login	Elton.Jones	elton	elton.vision11@salesforce.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/> Edit	J.O.Brown	j.brown	jbrown000000000000000000000000000000@mail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	User.Interaction	interact	interaction0000000000000000@mail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	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:

Help for this Page

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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, Alias: sba, Email: 2k21@klot.ac.in, Username: 2k21@klot.ac.in, Nickname: User169167712326452615, Title: worker, Company: kkt bank, Department: , Division: , 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, Federation ID: , App Registrations: One-Time Password, Administrator, App Registrations: Two-Factor Authentication, App Registrations: Multi-Factor Authentication.
- Role:** Salesforce Platform Manager, Active: checked, Marketing User, Offline User, Knowledge User, File User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Mobile Phone Registration: Data.com User Type, Accessibility Mode (Classic Only), Deleting Mode, High-Contrast Colors on Charts, Land lightning Pages Wide Scrolling, Salesforce CRM Content User.

Gmail Welcome Email:

Subject: Welcome to Salesforce!

Dear sowmya bala,

Click below to verify your account.

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

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

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 requirements is a field labeled "New Password" containing "*****" with a "Good" status indicator. Underneath is a "Confirm New Password" field also containing "*****". A "Security Question" section follows, with the question "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" (*****), a "Log In" button, a "Remember me" checkbox, 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 above a "WATCH ON DEMAND" button. On the right side of the sidebar, there is a cartoon character of a man with white hair and a black hoodie running towards the right, with the text "AI Day" written in large, bold, blue letters below him. At the bottom of the sidebar, there is a copyright notice: "© 2023 Salesforce, Inc. All rights reserved."

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

Top Screenshot: The user is viewing 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: A new Bank record is being created. The "Bank Name" field is populated with "bpi". Other fields visible include "Owner" (set to "sowmiya bala") and "Phone". The "Save" button is highlighted.

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 modal is the main customer list page, which shows a single record named "madhu".

Field	Value
customer_name	madhu
Bank	bol

Bottom Screenshot: The same customer record "madhu" is viewed in detail. The "Details" tab is selected, displaying the same information: "customer_name" (madhu) and "Bank" (bol). The "Created by" field shows "sewamya.bala" and the "Last Modified by" field also shows "sewamya.bala".

Field	Value
customer_name	madhu
Bank	bol
Created by	sewamya.bala, 01/10/2023, 7:17 pm
Last Modified by	sewamya.bala, 01/10/2023, 7:17 pm

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 list 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 legend at the bottom right shows letters A through Z and Other, with "Salesforce" highlighted.

Screenshot 2: Clone Profile Dialog

This screenshot shows the "Clone Profile" dialog box. The title bar says "Clone Profile". The main area contains the instruction "Enter the name of the new profile". Below it is a message: "You must select an existing profile to clone from." A dropdown menu titled "Profile Name" lists three options: Existing Profile, Standard Platform User, and User License. The "User License" option is selected, and its dropdown shows "SalesManager". 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 [VIEW AS LIST]
Home Page Layout	Not Assigned [View Assignment]	Order [View Assignment]
Account	Home Page Default [View Assignment]	Order Product Layout [View Assignment]
Alternative Payment Method	Account Layout [View Assignment]	Order Line Item [View Assignment]
Appointment Invitations	Alternative Payment Method Layout [View Assignment]	Payment [View Assignment]
Asset	Appointment Invitations Layout [View Assignment]	Payment Authorization [View Assignment]
	Asset Layout [View Assignment]	Payment Authorization Adjustment Layout [View Assignment]
		Payment Gateway [View Assignment]

Profile Edit

Profile Edit

salesmanage

Save | Save & New | Cancel

Custom App Settings

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

Q user

Users

- Permission Set Groups
- Permission Sets
- Profiles
- Public Groups
- Queues
- Roles
- User Management Settings
- Users**
- Feature Settings
- Data.com
- Prospector Users
- Service
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- App Menu

Search Setup

Users

New User

User Edit Save Save & New Cancel

General Information

First Name	machu
Last Name	b
Alias	mb
Email	2k20csit79@kotek.ac.in
Username	User189618642426654192
Nickname	worker
Title	worker
Company	kot bank
Department	Sales
Division	

Role: <None Specified>

User License: Salesforce Integration

Profile: Salesforce API Only System Integrations

Active:

Marketing User:

Office User:

Knowledge User:

File User:

Service Cloud User:

Sitcom Contributor User:

Sitcom Publisher User:

VBC User:

Data.com Use 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

Q user

Users

- Permission Set Groups
- Permission Sets
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Search Setup

Users

New User

User Edit Save Save & New Cancel

General Information

First Name	machu
Last Name	b
Alias	mb
Email	2k20csit79@kotek.ac.in
Username	User189618642426654192
Nickname	worker
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:

Sitcom Contributor User:

Sitcom Publisher User:

VBC User:

Data.com Use Type: -None-

Data.com Monthly Addition Limit: Default Level (1000)

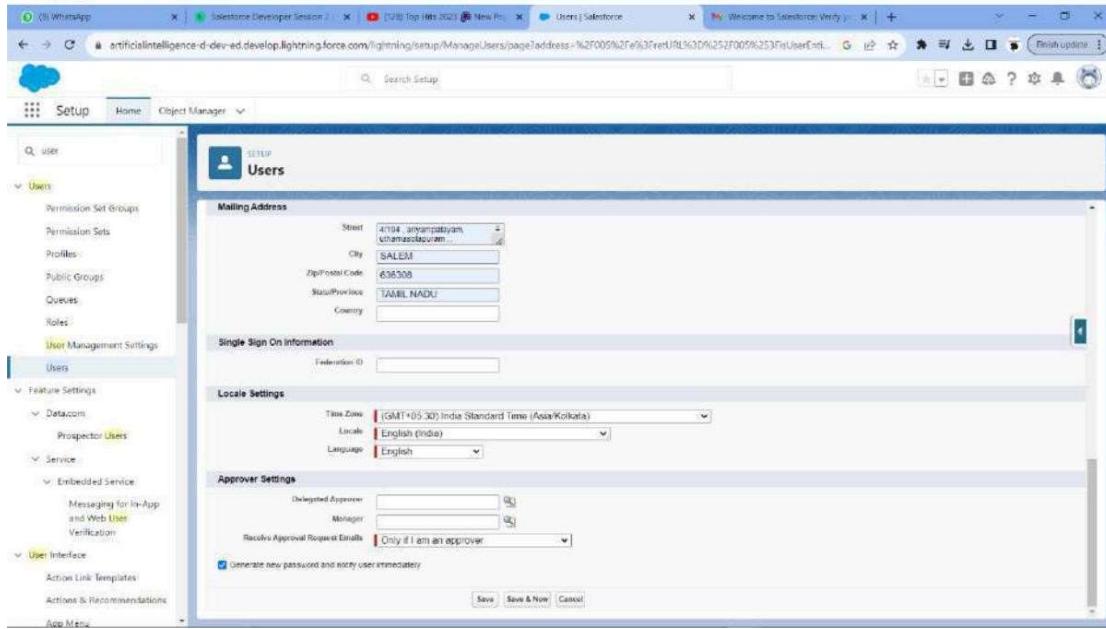
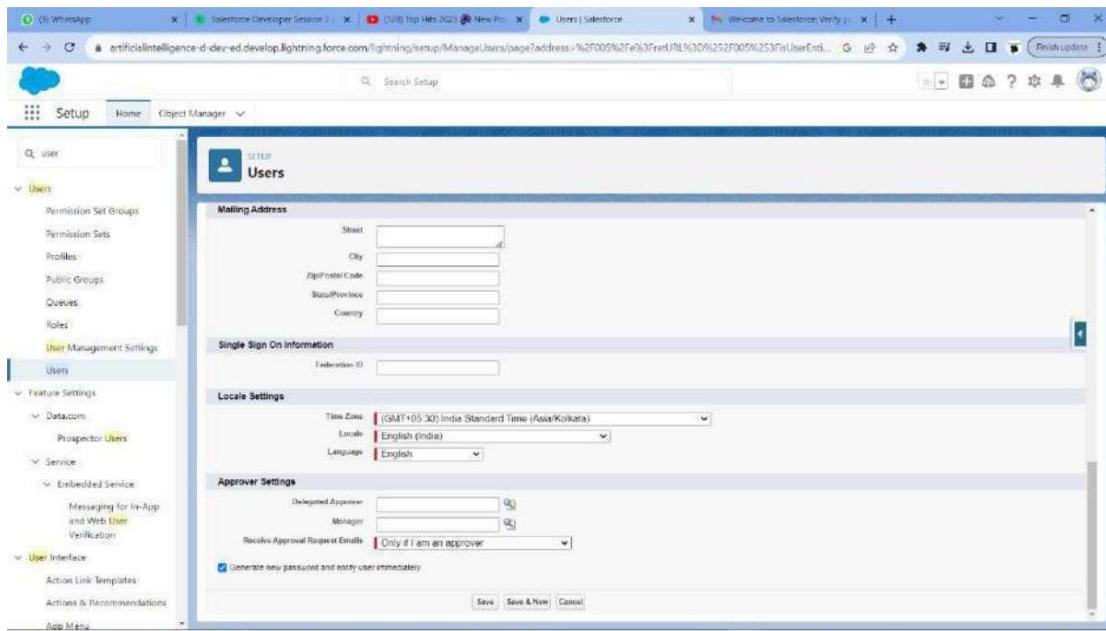
Accessibility Mode (Classic Only):

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' with details such as Name (madhu b), Alias (mo), Email (2k20csit25@kcot.ac.in), Username (2k20csit25@kcot.ac.in), Nickname (User1691642425519209), Title (worker), Company (kot bank), Department (Sales), Division (Sales), Address (4101, Anna Nagar, Uthamapalayam, Uthamapalayam, Tamil Nadu, 626006), Time Zone (IST (UTC+03:00) 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), Federation ID (None), App Registration One-Time Password (None), and Authentication (None). The user has a Role of 'Salesforce Platform' and a Profile of 'salesforce'. The bottom window is a Gmail inbox, showing an incoming email from Salesforce. The subject of the email is 'Welcome to Salesforce!' and it contains a verification link: <https://artificialintelligence-d-dev-ed.develop.my.salesforce.com>. The email also includes the username '2k20csit25@kcot.ac.in' and the message 'Again, welcome to Salesforce!'. The Gmail inbox shows 5,318 messages in the inbox.

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

Users

Permission Set Groups

Permission Sets

Profiles

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User Management Settings

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Messaging for In-App and Web User

Verification

User Interface

Action Link Templates

Actions & Recommendations

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 8 Seconds

44 Positions Next ►

Page 1 of 2

<https://artificialintelligence-d-dev-ed.lightning.force.com/lightning/custome...>

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:

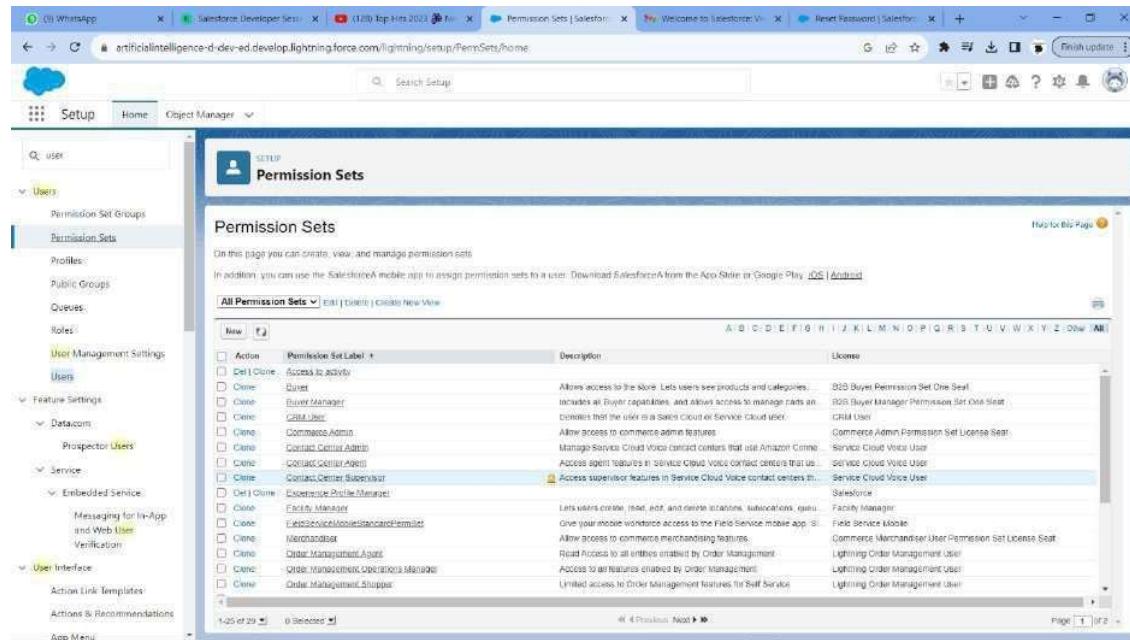
- Ensure that the Account records are owned by the respective users, with User A owning their records and User B owning their records.

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 'Action' column contains checkboxes for 'Edit' and 'Delete'. The 'Permission Set Label' column lists various roles and profiles. The 'Description' column provides a brief overview of the permissions granted, such as 'Access to the store', 'Manage Service Cloud Voice contact centers', and 'Access supervisor features in Service Cloud Voice contact centers'. The 'Users' column lists the specific user profiles assigned to each permission set. The page includes navigation links like 'All Permission Sets', 'Edit', 'Delete', and 'Create New View' at the top, and a search bar at the bottom.

Action	Permission Set Label	Description	Users
<input type="checkbox"/>	Access to activity	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		CRM User
<input type="checkbox"/>	Buyer Manager		Commerce Admin
<input type="checkbox"/>	CRM User		Contact Center Agent
<input type="checkbox"/>	Commerce Admin	Allow access to commerce admin features.	Contact Center Admin
<input type="checkbox"/>	Contact Center Agent	Manage Service Cloud Voice contact centers that use Amazon Connect.	Contact Center Supervisor
<input type="checkbox"/>	Contact Center Supervisor	Access agent features in Service Cloud Voice contact centers that use Amazon Connect.	Executive Profile Manager
<input type="checkbox"/>	Executive Profile Manager	Access supervisor features in Service Cloud Voice contact centers that use Amazon Connect.	Facility Manager
<input type="checkbox"/>	Field Service Manager	Lets users create, edit, and delete instances, sublocations, and give your mobile workforce access to the Field Service mobile app.	Field Service Mobile
<input type="checkbox"/>	MarketingUser	Allow access to commerce marketing features.	Commerce Marketing User
<input type="checkbox"/>	Order Management Agent	Read Access to all entities enabled by Order Management.	Lightning Order Management Agent
<input type="checkbox"/>	Order Management Operations Manager	Access to all features enabled by Order Management.	Lightning Order Management User
<input type="checkbox"/>	Order Management Shoppier	United access to Order Management features in Self Service.	Lightning Order Management User

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

Left Sidebar (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

Main Content Area (Permission Sets Create Page):

Enter permission set information:

- Label:** salesmanager
- API Name:** salesmanager
- Description:** (empty)
- Session Activation Required:**

Select the type of users who will use this permission set:

Who will use this permission set?

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

Not sure what a permission set license is? Learn more [link].

Licenses:

Buttons: Save | Cancel

Permission Sets

salesmanager

Permission Set Overview

Description	API Name
License	Namespace Prefix
Session Activation Required	Created By
Last Modified By	Created On

Apps

Assigned Apps
Assigned Connected Apps
Object Settings
App Permissions
Apex Class Access
Visualforce Page Access
External Data Source Access
Email Access

Object Settings

Object Name	Object Permissions	Total Fields	Tab Settings
Account	No Access	40	—
AI Insight Reasons	No Access	—	—
AI Record Insights	No Access	—	—
ASSIGNING PAYMENT METHODS	No Access	27	—
ATTENDANT Event Stores	No Access	—	—
Aut 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 Type Slots	No Access	6	—
Asset Actions	No Access	50	—
Asset Action Sources	No Access	18	—
Asset Recipients	—	10	—
Asset	No Access	42	—
Asset Life Cycles	No Access	11	—

Salesforce Developer Setup

Permission Sets | Salesforce

https://artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2F0PS5900000PhoLd%3FentityPermissions%26o%3D...

Setup Home Object Manager

User

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Datacom

Prospector Users

Service

Embedded Service

Messaging for In-App and Web User Verification

User Interface

Action Link Templates

Actions & Recommendations

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=%2F0PS5900000PhoLd%3FentityPermissions%26o%3D...

Setup Home Object Manager

User

Permission Set Groups

Permission Sets

Profiles

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Users

Feature Settings

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User Interface

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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 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

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

Screenshot 1: Current Assignments

The page title is "Permission Sets | Salesforce". The URL is "https://artificialintelligence-d-dev-ed-develop.lightning.force.com/lightning/setup/PermSets/0P5500000Ph0/PermissionGetAssignment/home". The left sidebar shows the "User Management Settings" section under "Users". The main content area is titled "salesmanager" and shows a "Current Assignments" section with a "No assignments defined." message. There is a decorative illustration of a cactus and clouds.

Screenshot 2: Select Users (to Assign)

The page title is "Permission Sets | Salesforce". The URL is "https://artificialintelligence-d-dev-ed-develop.lightning.force.com/lightning/setup/PermSets/0P5500000Ph0/PermissionGetAssignment/new". The left sidebar shows the "User Management Settings" section under "Users". The main content area is titled "All Users" and lists several users with checkboxes next to their names. One user, "malhu b", has a checkbox checked. The "Profile" column shows "salesmanager" for this user. Other users listed include amelia.ellington, Chatter Expert, Diya Adarsh, GOPAL S, Integration User, and sevanya bala.

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

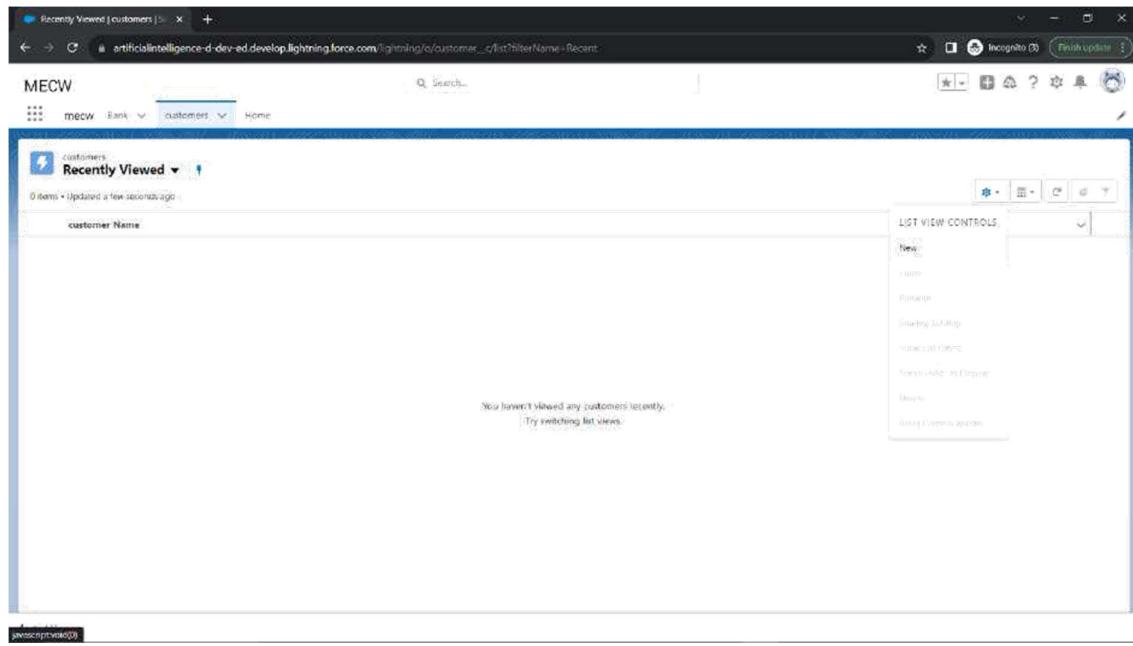
Messaging for In-App and Web User Verification

User Interface

Action Link Templates

Actions & Recommendations

App Menu

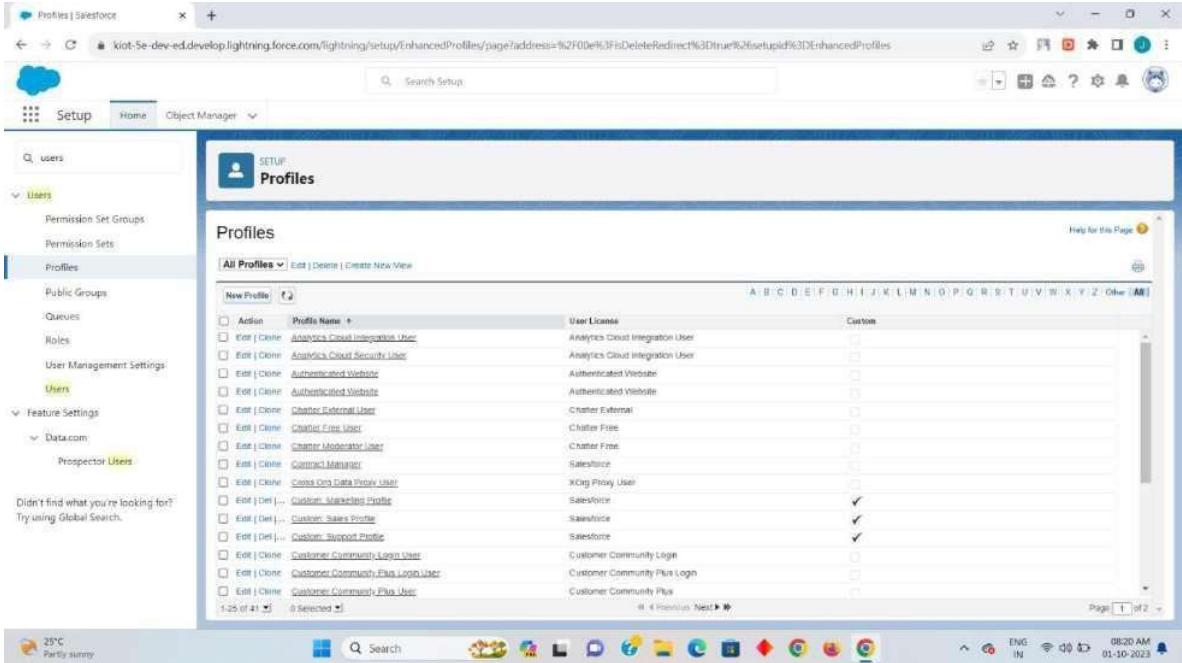


3. . Suppose there are 2 Users and they are having Create, Read, Edit access on Account Object with the same profile but we want to open up the access for one user to delete how will you implement the Security setting.

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]

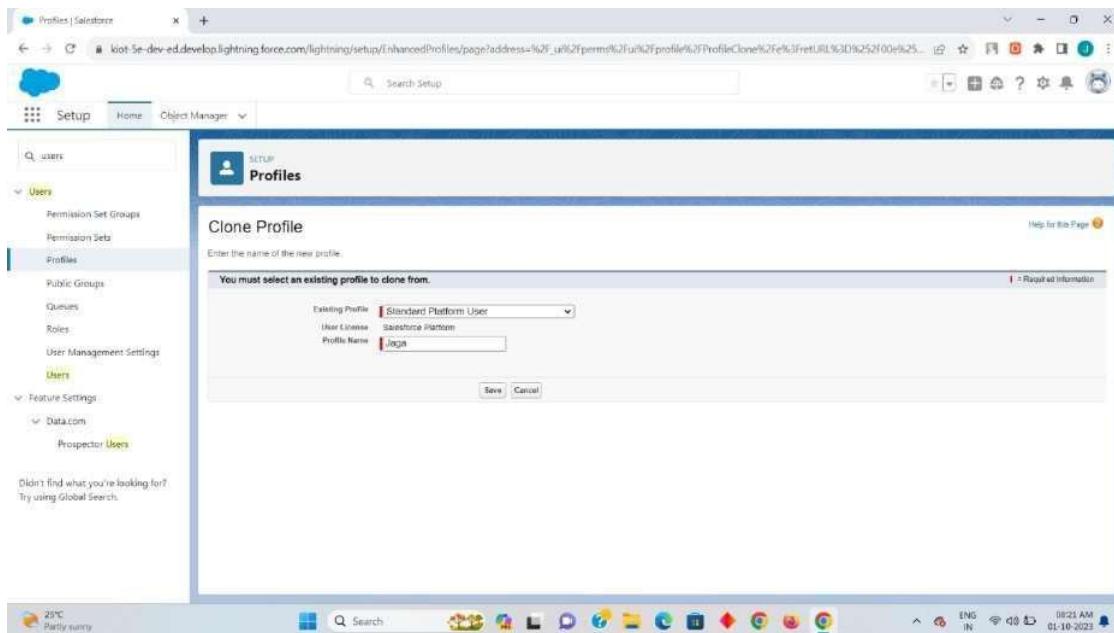


The screenshot shows the Salesforce Setup interface with the following details:

- 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 Analytics Cloud Integration User, Analytics Cloud Security User, Authenticated Website, Authenticated Website, Chatter External, Chatter Free, Chatter Free, Customer Manager, XOrg Proxy User, SalesForce, SalesForce, Customer Community Logon User, Customer Community Plus Logon User, Customer Community Plus User.
- Page Footer:** Page 1 of 2, 1-25 of 41, 0 Selected.
- System Status:** 25°C Partly sunny, Search bar, Taskbar icons, Date: 01-10-2023, Time: 08:20 AM, ENG IN.

Step 2:

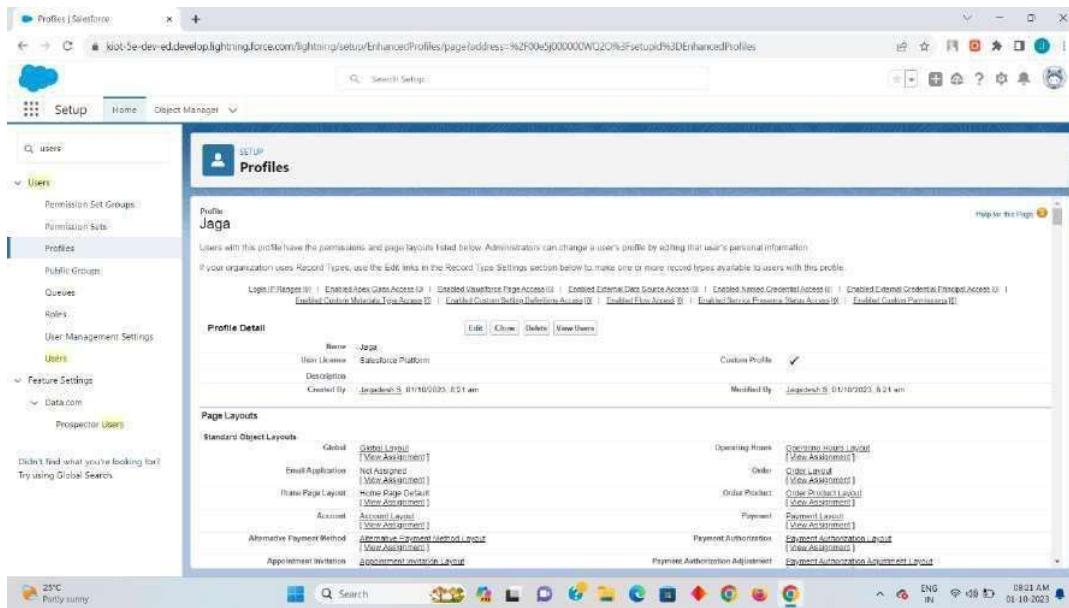
Click on the new to create a new profile along with the label and Api

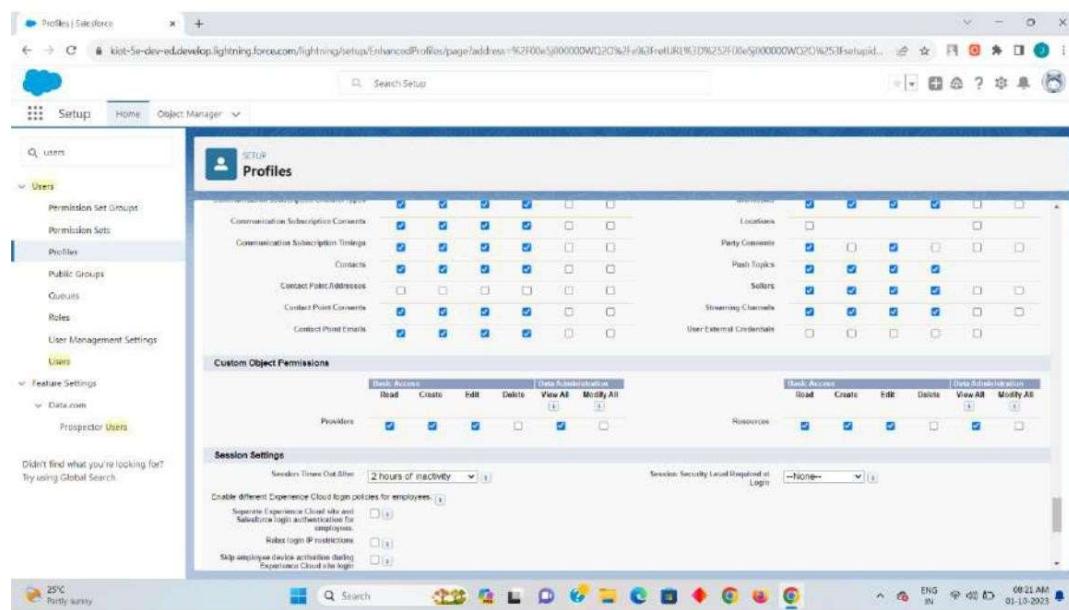
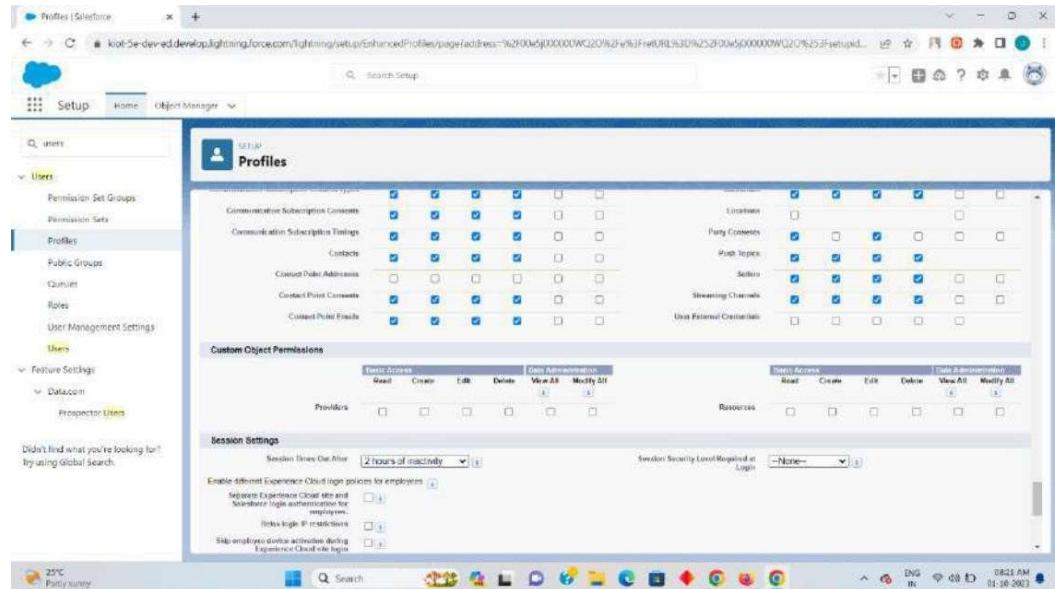


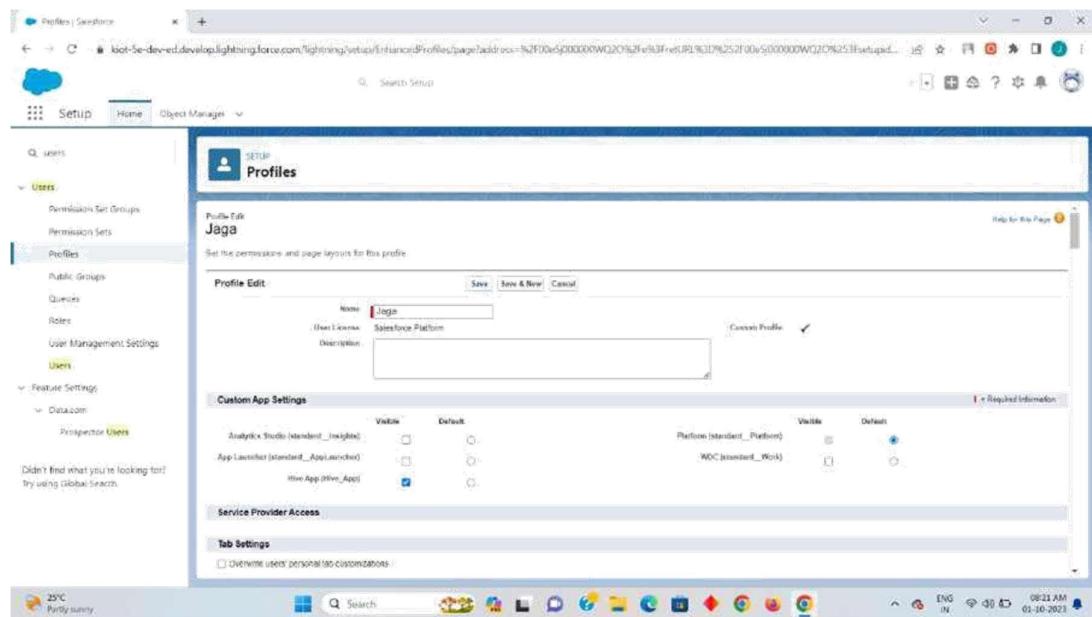
Here I had made it my profile name as Jaga and the existing profile as Standard Platform User.

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.

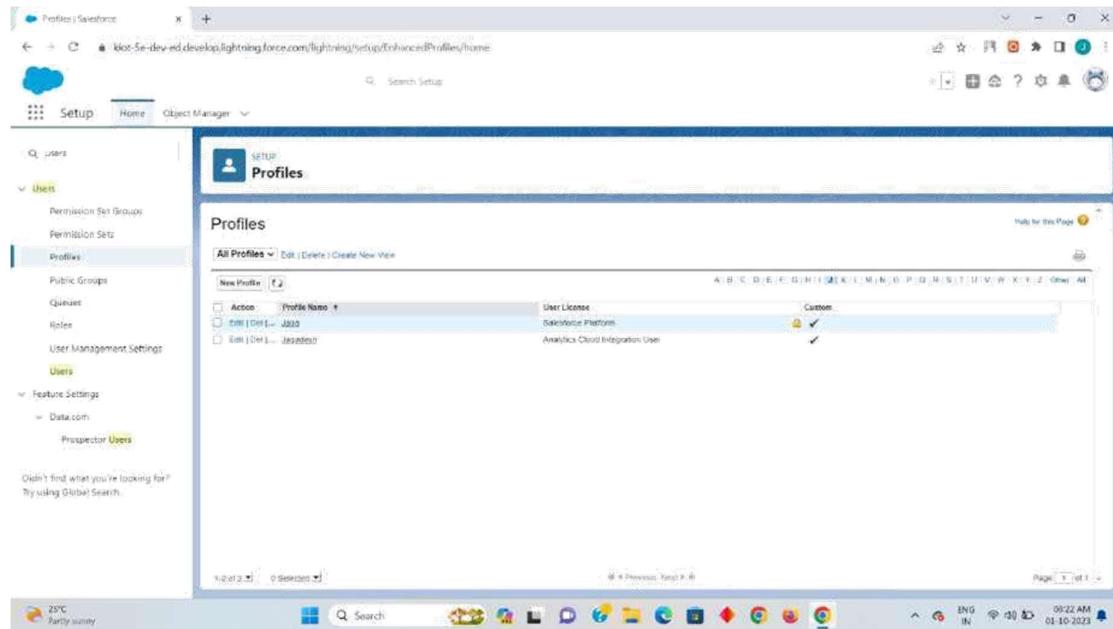






Step 4

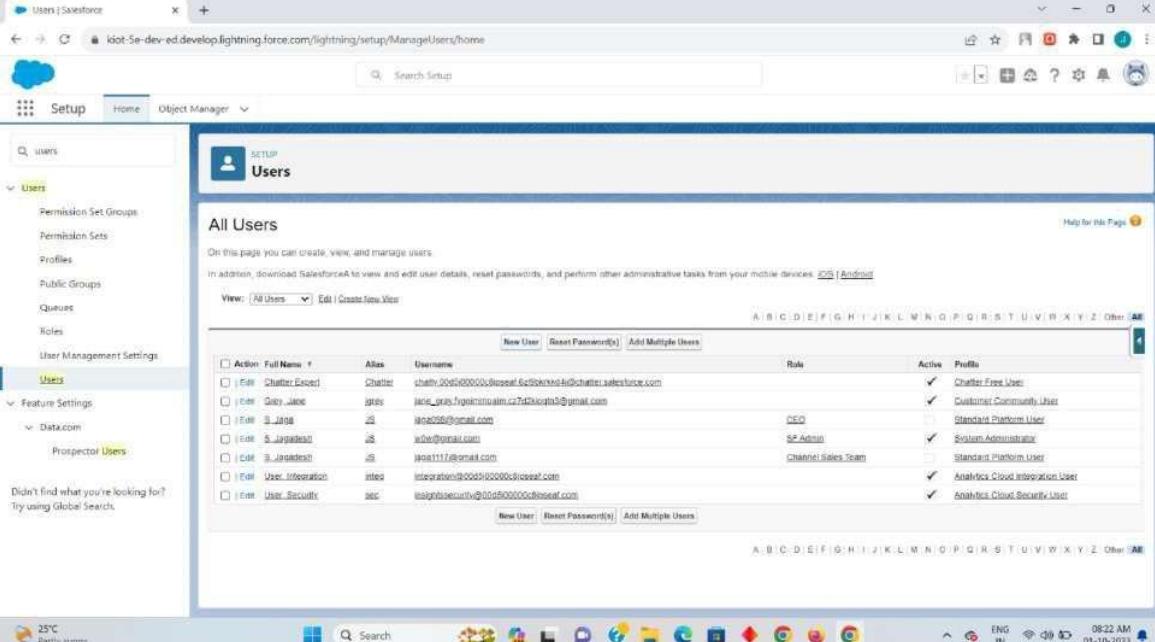
Now you can preview your created profile on the profile option here my profile name jaga has been created with the access of read,create,edit along with view on it



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.



The screenshot shows the Salesforce Setup interface for managing users. The left sidebar is titled 'Users' and includes options like Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and a 'Users' section. The main content area is titled 'All Users' and displays a list of existing users. The columns include Action, Full Name, Alias, Username, Role, Active, and Profile. A new user can be added via 'New User'. The right side of the screen shows a list of profiles: Chatter Free User, Customer Community User, Standard Platform User, System Administrator, Standard Platform User, Analytics Cloud Integration User, and Analytics Cloud Security User. The bottom of the screen shows the system status bar with weather information (25°C Partly sunny), a search bar, and various system icons.

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@yahanmomin.cz7d2scapta@gmail.com		<input checked="" type="checkbox"/>	Customer Community User
<input type="checkbox"/> Edit	S_Jaga	gaj	luc2020@gmail.com	CEO	<input type="checkbox"/>	Standard Platform User
<input type="checkbox"/> Edit	S_Jagadeesh	gaj	gaj2020@gmail.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

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User Management Settings

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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

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User Management Settings

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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 | Subsistence

https://kot-Se-dev-ed.lightning.force.com/lightning/setup/PermSets/home

Setup Home Object Manager

Search Setup

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospecter Users

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

Permission Sets

Online page you can create, view, and manage permission sets. In addition, you can use the Salesforce mobile app to assign permission sets to a user. Download Salesforce from the App Store or Google Play. iOS | Android

All Permission Sets | Car (Code) Create New

New | F2

Action	Permission Set Label	Description	Licenses
<input type="checkbox"/>	Basic	Allows access to the setup, lets users view products, view categories, and access all master categories. API access is available to include carts, API calls, and more.	100 User, 1000 Page, 1000 Record, 1000 API, 1000 User, 1000 License
<input type="checkbox"/>	Basic Admin	Includes the basic user license plus Commerce Admin features.	1000 User, 1000 License
<input type="checkbox"/>	Commerce Admin	Includes Service Cloud View contact centers that use Account Center.	Service Cloud View User
<input type="checkbox"/>	Contract Admin	Access right features in Service Cloud View contact centers that use Contract Center.	Service Cloud View User
<input type="checkbox"/>	Customer Support	Access right features in Service Cloud View contact centers that use Customer Support.	Service Cloud View User
<input type="checkbox"/>	Customer Success	Access right features in Service Cloud View contact centers that use Customer Success.	Service Cloud View User
<input type="checkbox"/>	Customer Support Agent	Access right features in Service Cloud View contact centers that use Customer Support Agent.	Service Cloud View User
<input type="checkbox"/>	Customer Success Agent	Access right features in Service Cloud View contact centers that use Customer Success Agent.	Service Cloud View User
<input type="checkbox"/>	Employee Portal Manager	Allows access to Employee Portal.	Employee Portal User
<input type="checkbox"/>	Facility Manager	Provides access to facilities management.	Facility Manager
<input type="checkbox"/>	Field Service Manager	Provides access to field service management.	Field Service Manager
<input type="checkbox"/>	Force.com Platform	Provides access to Force.com Platform.	Force.com Platform
<input type="checkbox"/>	Marketing	Provides access to marketing.	Marketing
<input type="checkbox"/>	Merchandise	Provides access to commerce merchandising features.	Commerce Merchandise User
<input type="checkbox"/>	Order Management	Provides access to Order Management.	Order Management User
<input type="checkbox"/>	Order Management (Commerce)	Provides access to Order Management.	Order Management User

102 of 102 | 0 Selected | Previous Next | Page 1 of 1

Help for this Page

https://kot-Se-dev-ed.lightning.force.com/lightning/setup/PermSets/home

ENG IN 09:24 AM 01-10-2023

Permission Sets | Subsistence

https://kot-Se-dev-ed.lightning.force.com/lightning/setup/PermSets/page/address=%2Fud%2FnewPermissionSet.apexp

Setup Home Object Manager

Search Setup

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

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Users

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Data.com

Prospecter Users

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

Permission Set Create

Enter permission set information

Name: permission12

API Name: permission12

Description:

Select the type of users who will use this permission set

Who will use this permission set?

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

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

License: All users

Save Cancel

25°C Partly sunny

Search

Help for this Page

https://kot-Se-dev-ed.lightning.force.com/lightning/setup/PermSets/page/address=%2Fud%2FnewPermissionSet.apexp

ENG IN 09:24 AM 01-10-2023

Permission Sets | Salesforce

Setup Home Object Manager

Q users

User

Permission Set Groups

Permission Sets

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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

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Prospector Users

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

25°C Partly sunny

SEARCH

Permission Sets

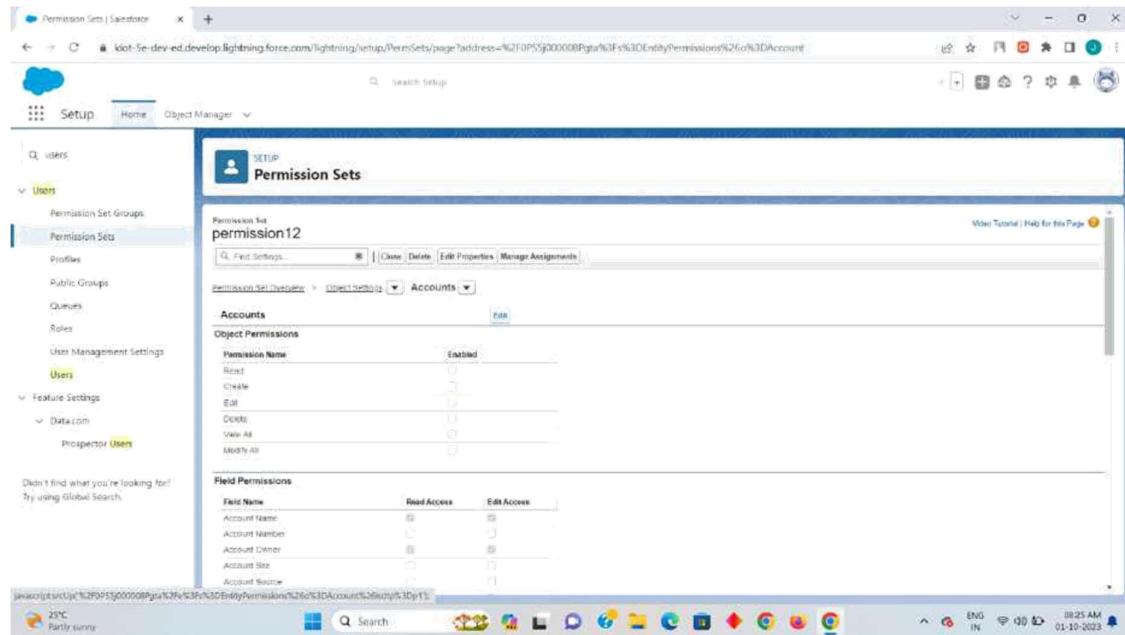
permission12

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



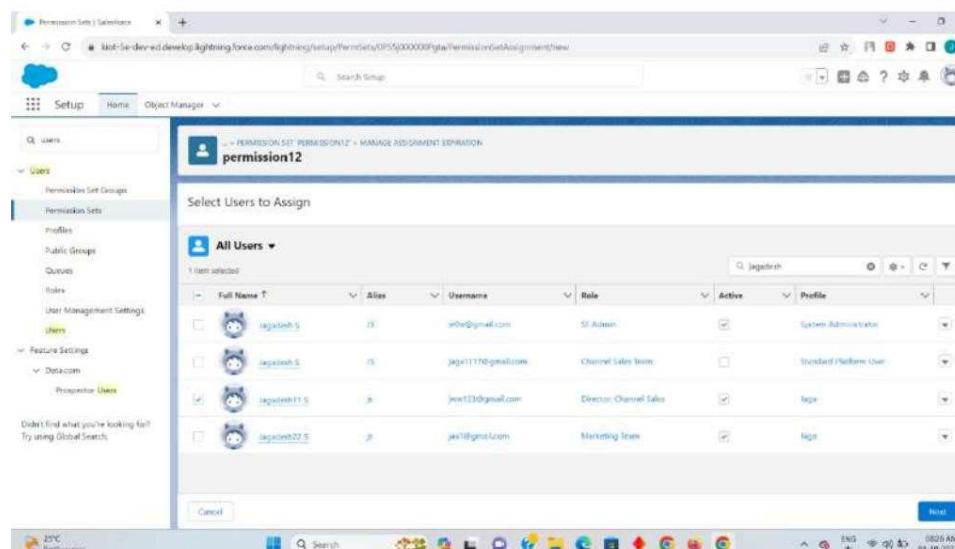
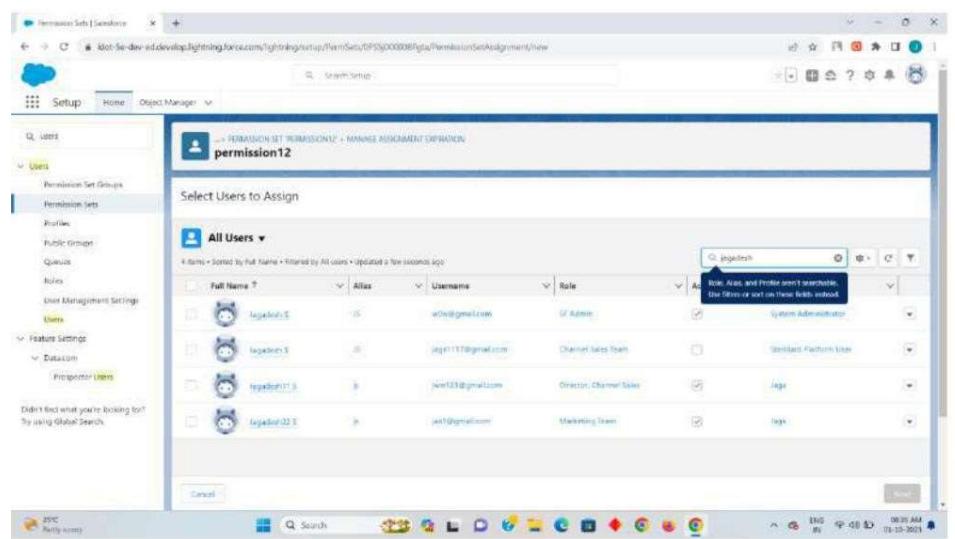
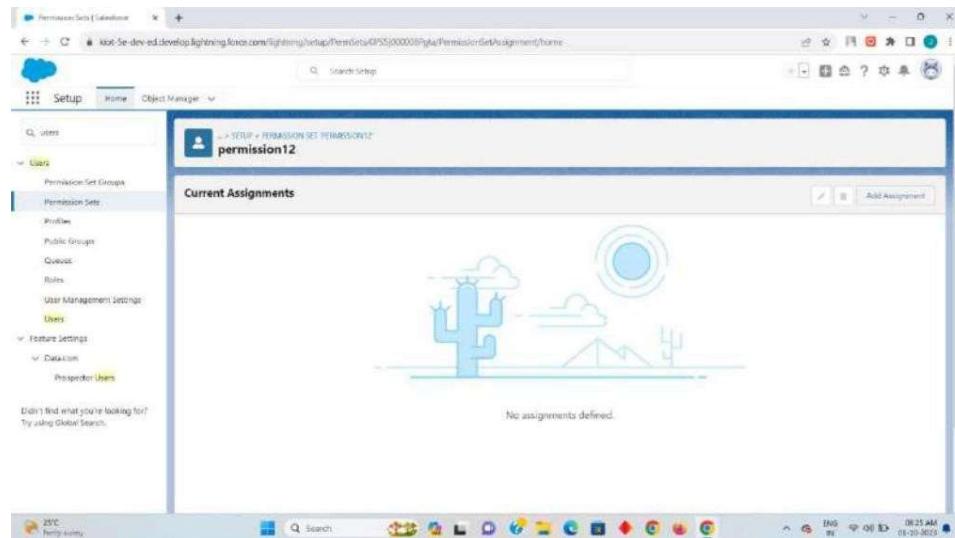
Step 7:

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.

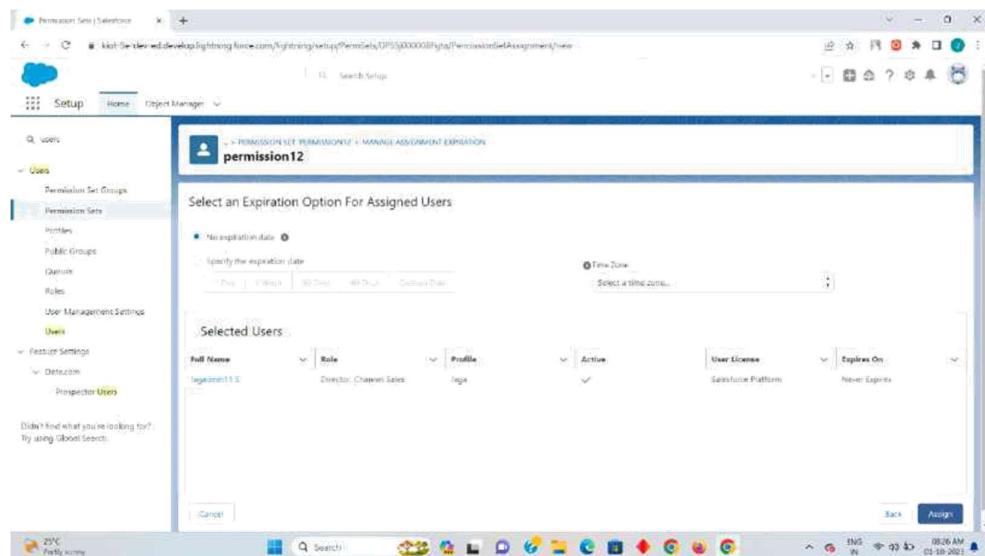
The screenshots show the 'Permission Sets' page in the Salesforce Setup. The permission set is named 'permission12'. Under the 'Accounts' tab, the 'Object Permissions' section shows 'Edit' checked for the 'Edit' permission. In the bottom screenshot, a cursor is hovering over the 'Edit' button.

Step 8

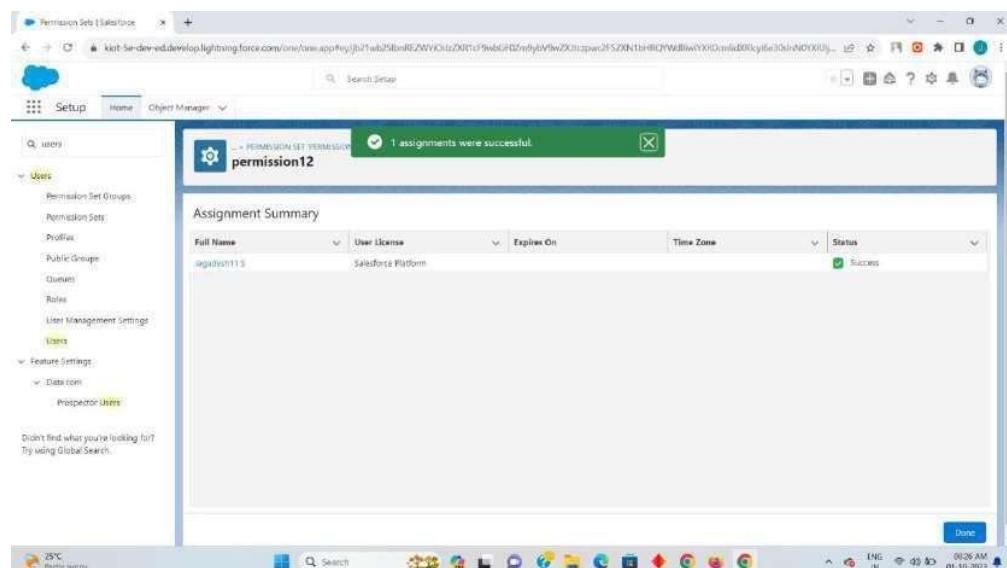
Now click on add assignment there you will find your two created users click on any one user to give a special access as delete on it and then click on assign so that the specific selected user can have a special access as delete on it.



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.**

Edit Email Alert
Survey - Thank You Email

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

Email Alert Edit Save Save & New Cancel

Edit Email Alert | = Required Information

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

Save Save & New Cancel

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

- 1. Click Setup.**

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

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

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

2.Value: {!Comment}

2.Click Add Row

3.Row 2:

1.Field: Email__c

2.Value: {!Email.value}

4.Click Add Row

5.Row 3:

1.Field: Name__c

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

6.Click Add Row

7.Row 3:

1.Field: Rating__c

2.Value: {!Rating}

7.Click Done.

Edit Create Records

Create Salesforce records using values from the flow.

* Label	* API Name
Save Response	Save_Response

Description

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 ₃ Comment X
Email__c	← A ₃ Email > Value X
Name__c	← {!Name.firstName} {!Name.lastName}
Rating__c	← A ₃ Rating X

+ Add Field

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**.

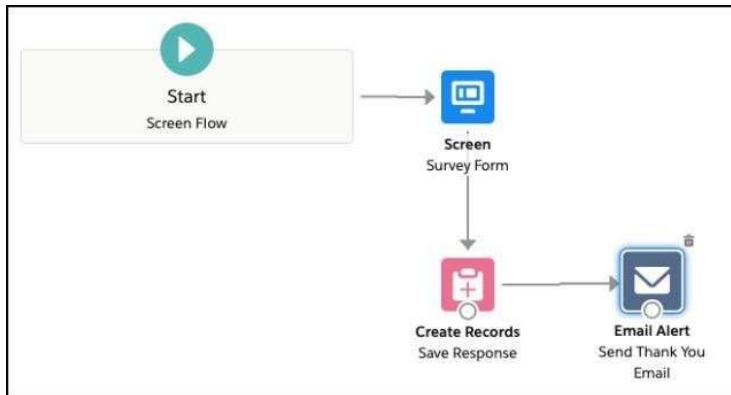
4. Clicks on the Survey – Thank You Email email alert.
5. Click Done.

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**

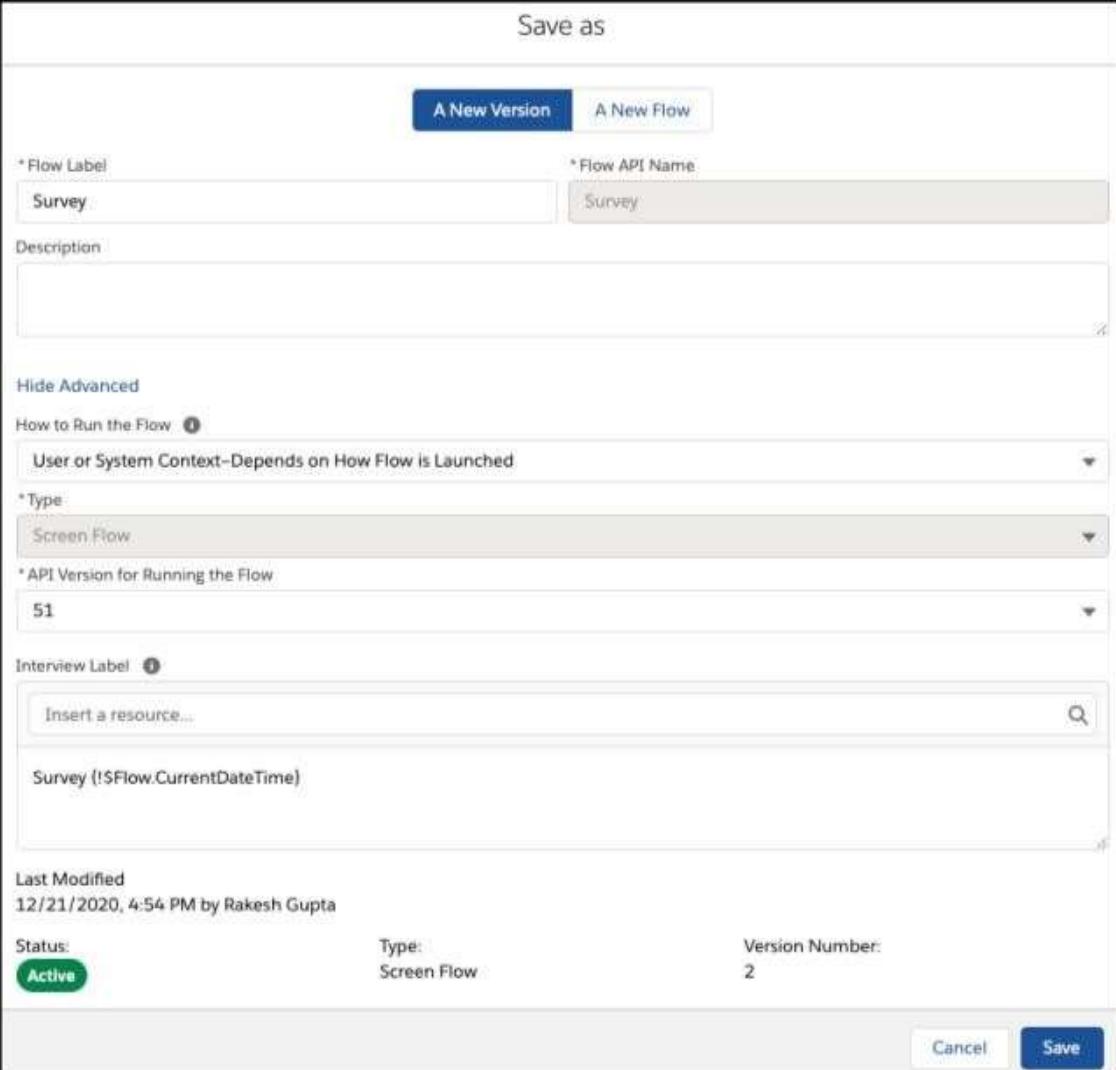
* API Version for Running the Flow: **51**

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

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

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

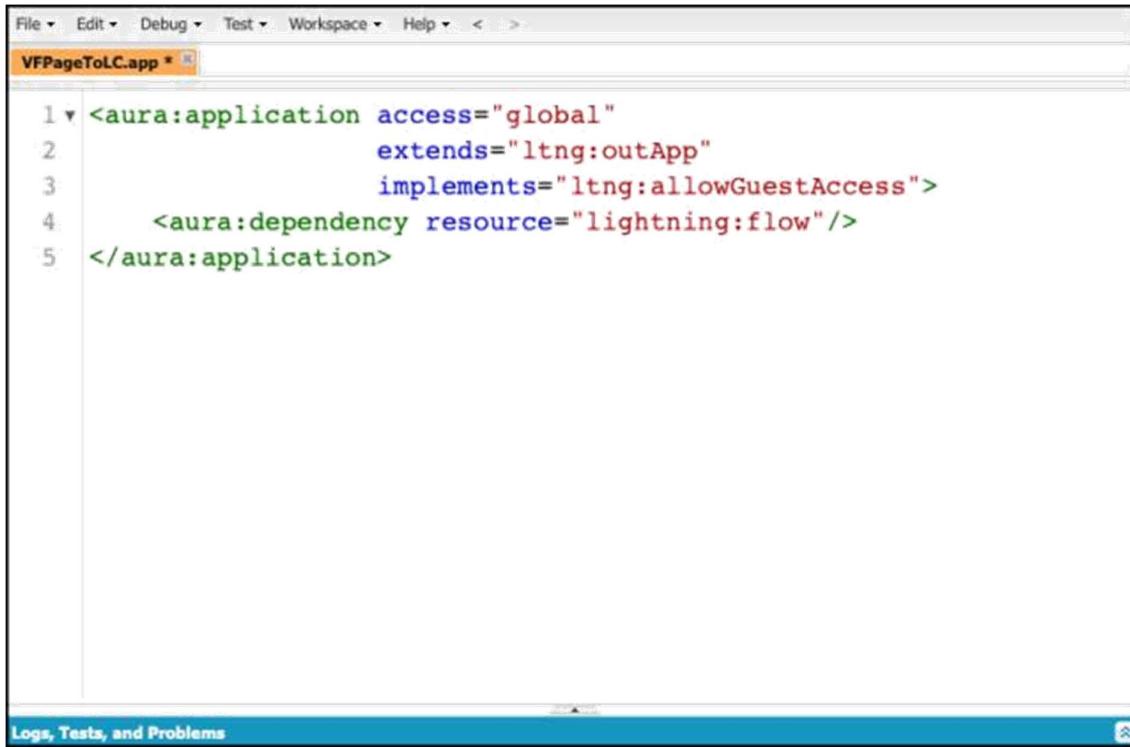
Cancel Save



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