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Salesforce Developer(Course)
Assignment No-1

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Year & Dep : 4th year & CSBS

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Zone no : Zone 8

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

Solution:

Step 1: Create Custom Objects

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

The screenshot shows the 'New Custom Object' page in the Salesforce Setup interface. The page is titled 'New Custom Object' and includes sections for 'Custom Object Information', 'Enter Record Name Label and Format', 'Optional Features', 'Object Classification', 'Deployment Status', 'Search Status', and 'Object Creation Options'. The 'Label' field is set to 'college' and the 'Plural Label' is set to 'colleges'. The 'Record Name' field is set to 'college'. The 'Data Type' is selected as 'Text'. Under 'Optional Features', 'Allow Reports' and 'Allow Activities' are checked. Under 'Object Classification', 'Allow Sharing' and 'Allow Bulk API Access' are checked. Under 'Deployment Status', 'Deployed' is selected. Under 'Search Status', 'Allow Search' is checked. Under 'Object Creation Options', 'Add Notes and Attachments related list to default page layout' is checked. At the bottom, there are 'Save', 'Save & New', and 'Cancel' buttons.

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

The screenshot shows the Salesforce Setup interface under the Object Manager tab. A message at the top indicates that permissions for the object are disabled by default. The main form is titled "Custom Object Definition Edit" and contains sections for "Custom Object Information", "Enter Record Name Label and Format", "Optional Features", "Object Classification", "Deployment Status", "Search Status", and "Object Creation Options". The "Record Name" field is set to "Department Name" and "Data Type" is "Text". Under "Optional Features", "Allow Reports" and "Allow Activities" are checked. In "Object Classification", "Allow Sharing" and "Allow Bulk API Access" are checked. Under "Deployment Status", "Deployed" is selected. The "Search Status" section is enabled. The "Object Creation Options" section has two unchecked checkboxes: "Add Notes and Attachments related list to default page layout" and "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
department

Details

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

Details

Description
API Name: department__c
Custom
Singular Label: department
Plural Label: departments

Edit | Delete

Enable Reports
Track Activities
Track Field History
Deployment Status
Deployed
Help Settings
Standard salesforce.com Help Window

Setup | Home | Object Manager

SETUP > OBJECT MANAGER
department

Details

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

New Relationship

Step 6. Add custom related lists Step 6 of 6

Field Label: collage
Data Type: Master-Detail
Field Name: collage
Description:

Specify the title that the related list will have in all of the layouts associated with the parent.
Related List Label: departments

These are the page layouts that will include this field. Because this is a Master-Detail relationship, the field is required.

Add Related List Page Layout Name
 collage Layout
 Append related list to users' existing personal customizations

Previous | Save & New | Save | Cancel

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

- Setup** icon in the top left.
- Search bar: Search Setup.
- Top right icons: Home, Object Manager, and various system icons.
- Breadcrumb: SETUP > OBJECT MANAGER.
- Object Name: department.
- Left sidebar (under Fields & Relationships):
 - Details
 - 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
- Main Content Area:

Fields & Relationships

4 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
collage	collage_c	Master-Detail(collage)		✓
Created By	CreatedById	Lookup(User)		
department Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		

Step 3: Create the Roll-Up Summary Field

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

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

Setup | Home | Object Manager

SETUP > OBJECT MANAGER
collage

Details

Fields & Relationships

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

New Custom Field

Step 5. Add to page layouts Step 5 of 5

Field Label: total count
Data Type: Roll-Up Summary
Field Name: total_count
Description:

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

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

<input checked="" type="checkbox"/> Add Field	Page Layout Name
<input checked="" type="checkbox"/>	collage Layout

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

Previous | Save & New | Save | Cancel

Setup | Home | Object Manager

SETUP > OBJECT MANAGER
collage

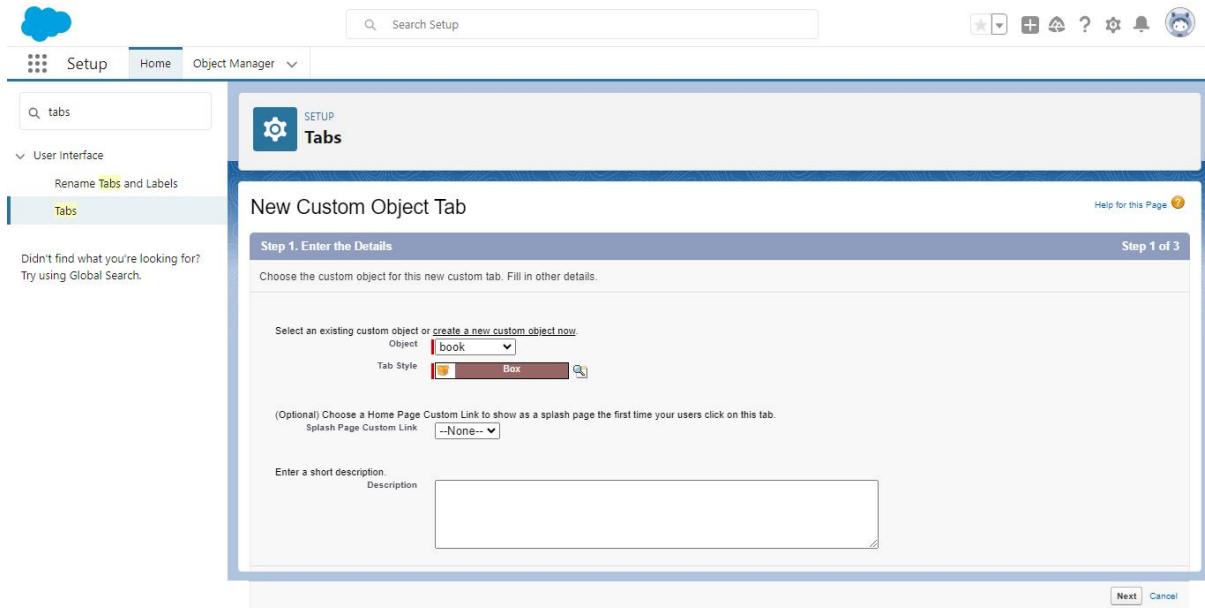
Fields & Relationships
5 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
collage Name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
total count	total_count_c	Roll-Up Summary (COUNT department)		

Details

Fields & Relationships

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



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.

New Lightning App

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

* App Name

* Developer Name

Description

App Branding

Image

Primary Color Hex
Value #0070D2

Org Theme Options
 Use the app's image and color instead of the org's custom theme

App Launcher Preview

Next

Lightning Experience App Manager

22 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type

App Name	Developer Name	Description	Last Modified ...	Ap...	Vi...
All Tabs	AllTabSet		22/08/2023, 10:48 am	Classic	<input type="checkbox"/>
Analytics Studio	Insights	Build CRM Analytics dashboards and apps	22/08/2023, 10:48 am	Classic	<input type="checkbox"/>
App Launcher	AppLauncher	App Launcher tabs	22/08/2023, 10:48 am	Classic	<input type="checkbox"/>
Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your ind...	22/08/2023, 10:51 am	Lightning	<input type="checkbox"/>
Community	Community	Salesforce CRM Communities	22/08/2023, 10:48 am	Classic	<input type="checkbox"/>
Content	Content	Salesforce CRM Content	22/08/2023, 10:48 am	Classic	<input type="checkbox"/>
Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage r...	22/08/2023, 10:48 am	Lightning	<input type="checkbox"/>
Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	22/08/2023, 10:48 am	Lightning	<input type="checkbox"/>
Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	22/08/2023, 10:48 am	Lightning	<input type="checkbox"/>
Marketing	Marketing	Best-in-class on-demand marketing automation	22/08/2023, 10:48 am	Classic	<input type="checkbox"/>
My Collage	My_Collage		03/10/2023, 11:35 am	Lightning	<input type="checkbox"/>
Platform	Platform	The fundamental Lightning Platform	22/08/2023, 10:48 am	Classic	<input type="checkbox"/>
Queue Management	QueueManagement	Create and manage queues for your business.	22/08/2023, 10:48 am	Lightning	<input type="checkbox"/>
Sales	Sales	The world's most popular sales force automation (SFA) solution	22/08/2023, 10:48 am	Classic	<input type="checkbox"/>
Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, ...	22/08/2023, 10:48 am	Lightning	<input type="checkbox"/>
Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple record...	22/08/2023, 10:48 am	Lightning	<input type="checkbox"/>
Salesforce Chatter	Chatter	The Salesforce Chatter social network, including profiles and fe...	22/08/2023, 10:48 am	Classic	<input type="checkbox"/>
Salesforce Scheduler	LightningScheduler	Set up personalized appointment scheduling.	22/08/2023, 10:50 am	Lightning	<input type="checkbox"/>
Service	Service	Manage customer service with accounts, contacts, cases, and m...	22/08/2023, 10:48 am	Classic	<input type="checkbox"/>
Service Console	LightningService	(Lightning Experience) Lets support agents work with multiple r...	22/08/2023, 10:48 am	Lightning	<input type="checkbox"/>
Site.com	Sites	Build pixel-perfect, data-rich websites using the drag-and-drop ...	22/08/2023, 10:48 am	Classic	<input type="checkbox"/>
Subscription Manager	RevenueCloudConsole	Get started automating your revenue processes	22/08/2023, 10:48 am	Lightning	<input type="checkbox"/>

Custom Tabs

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

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

Action	Label	Tab Style	Description
Edit Del	books	Box	
Edit Del	colleges	Heart	
Edit Del	departments	Building	
Edit Del	students	Diamond	

Web Tabs

No Web Tabs have been defined.

Visualforce Tabs

No Visualforce Tabs have been defined.

Lightning Component Tabs

No Lightning component tabs have been defined.

Lightning Page Tabs

No Lightning Page Tabs have been defined.

Conclusion:

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

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

New college

* = Required Information

Information

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

Owner: krishna s

Buttons: Cancel, Save & New, Save

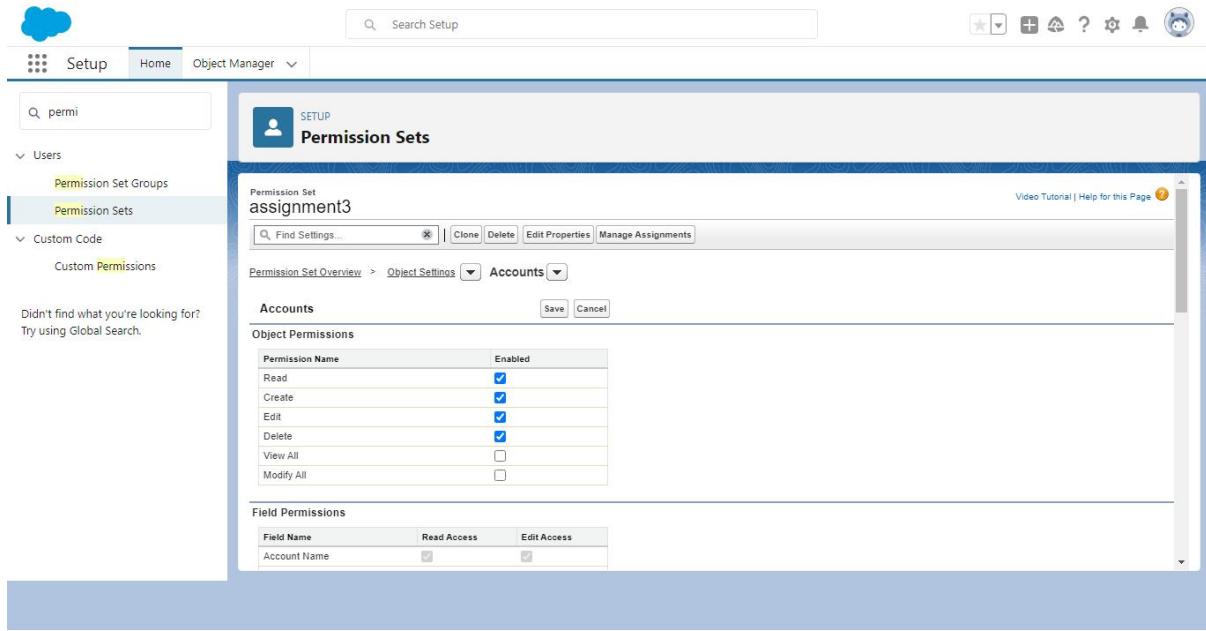
The screenshot shows a web-based application interface. At the top, there is a navigation bar with links for 'My college', 'colleges', 'CDepartments', 'student', and 'Content'. A search bar is located at the top right. Below the navigation, a 'Recently Viewed' section is displayed under 'CDepartments'. It shows one item: 'cse' (Department Name). The interface includes standard toolbar buttons for 'New', 'Import', and various document operations like 'Print', 'Edit', and 'Delete'. A 'History' link is visible at the bottom left.

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. On the left, a sidebar menu is open with sections for 'Setup', 'Home', and 'Object Manager'. Under 'Setup', 'Profiles' is selected. The main content area is titled 'Profiles' and shows a table of existing profiles. The table has columns for 'Action', 'Profile Name', 'User License', and 'Custom'. Two profiles are listed: 'venkat' (Analytics Cloud Integration User) and 'venkatt' (Analytics Cloud Integration User). Both profiles have a checked checkbox in the 'Custom' column. Navigation buttons at the bottom include '1-2 of 2', '0 Selected', 'Previous', 'Next', and 'Page 1 of 1'.



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:

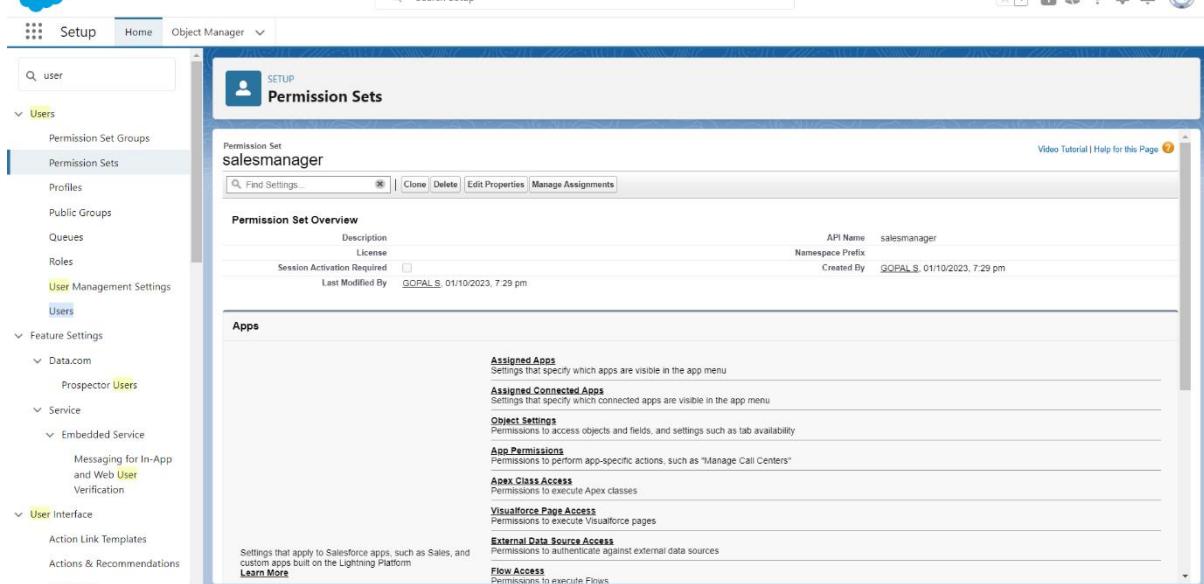
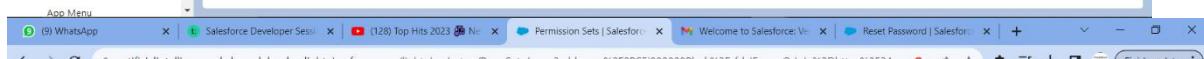
- Set the organization-wide defaults for the Account object to "Private" to ensure that records are private by default.

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, showing sections like 'Users', 'Feature Settings', 'Prospector Users', 'Service', 'User Interface', and 'Action Link Templates'. The main content area has a header 'Permission Sets' with a search bar and a help link. Below the header is a sub-header 'Permission Sets' with a note about creating, viewing, and managing permission sets. A sub-note mentions the Salesforce mobile app for assignment. A navigation bar at the top of the content area includes 'All Permission Sets', 'Edit | Delete', and 'Create New View'. A grid of permission sets is displayed with columns for 'Action', 'Permission Set Label', 'Description', and 'License'. The 'Permission Set Label' column contains labels such as 'Access to activity', 'Buyer', 'Buyer Manager', 'CRM User', 'Commerce Admin', 'Contact Center Admin', 'Contact Center Agent', 'Contact Center Supervisor', 'Experience Profile Manager', 'Facility Manager', 'FieldServiceMobileStandardPermSet', 'Merchandiser', 'Order Management Agent', 'Order Management Operations Manager', and 'Order Management Shopper'. The 'Description' column provides details for each label, and the 'License' column indicates the specific license required for each set. A pagination bar at the bottom shows '1 of 29' selected and '0 Selected'.



Salesforce Developer Session | artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2F0PS5j000008Phok%3Fs%3DEntityPermissions

Setup Home Object Manager

Search Setup

Permission Sets

salesmanager

Object Settings

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

Video Tutorial | Help for this Page

Object Settings

Object Name

Object Permissions

Total Fields

Tab Settings

Object Name

Object Permissions

Total Fields

Tab Settings

Salesforce Developer Session | artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2F0PS5j000008Phok%3Fs%3DEntityPermissions%26o%3Dp1

Setup Home Object Manager

Search Setup

Permission Sets

salesmanager

Object Settings

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

Video Tutorial | Help for this Page

Object Settings

Object Name

Object Permissions

Total Fields

Tab Settings

Object Name

Object Permissions

Total Fields

Tab Settings

Salesforce Developer Session | artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2F0P5j000008Phok%2Fe%3Fs%3DEntityPermissions%26o... | Reset Password | Salesforce | + | Finish update

Permission Sets

salesmanager

Object Settings Object Settings Bank

Tab Settings

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

Object Permissions

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

Field Permissions

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

Video Tutorial | Help for this Page

Salesforce Developer Session | artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/PermSets/OP55j000008Phok/PermissionSetAssignment/home | Reset Password | Salesforce | + | Finish update

salesmanager

... > SETUP > PERMISSION SET 'SALESMANAGER'

Current Assignments

No assignments defined.

Screenshot of the Salesforce Setup interface showing the "Select Users to Assign" screen.

The sidebar navigation includes:

- Setup
- Home
- Object Manager

Search bar: Search Setup

Section: Select Users to Assign

Filter: All Users

Table Headers: Full Name, All..., Username, Role, Ac..., Profile

Table Data:

Full Name	All...	Username	Role	Ac...	Profile
Amelia Ellington	aelli	amelia.ellington.1.46kxcp9oodlh.d6cwpdcuo4wh.hnbdwmvwhhq.wguctpr1dalv@gmail.com	<input checked="" type="checkbox"/>	Force.com - App Subscription User	
Chatter Expert	Chatter	chatty.00d5j00000bcslkeab.lo0bfwmpqike@chatter.salesforce.com	<input checked="" type="checkbox"/>	Chatter Free User	
Diya Adanna	dadan	test_diya_pas.4w8bjybi9wik.tszgrgsbkpx.3gi8ofovzwns.h43bkzw6mea@gmail.com	<input checked="" type="checkbox"/>	UMS User	
GOPAL S	GS	kiot520@gmail.com	<input checked="" type="checkbox"/>	System Administrator	
Integration User	integ	integration@00d5j00000bcslkeab.com	<input checked="" type="checkbox"/>	Analytics Cloud Integration User	
madhu b	mb	2k20csit@kiot.ac.in	<input checked="" type="checkbox"/>	salesmanage	
Security User	sec	insightssecurity@00d5j00000bcslkeab.com	<input checked="" type="checkbox"/>	Analytics Cloud Security User	
sowmya bala	sbal	2k21it@kiot.ac.in	<input checked="" type="checkbox"/>	Manager	

Buttons: Cancel, Next

Screenshot of the Salesforce Setup interface showing the "Select an Expiration Option For Assigned Users" screen.

The sidebar navigation includes:

- Setup
- Home
- Object Manager

Search bar: Search Setup

Section: Select an Expiration Option For Assigned Users

Radio Buttons: No expiration date (selected), Specify the expiration date

Time Zone: Select a time zone...

Table Headers: Full Name, Role, Profile, Active, User License, Expires On

Table Data:

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

Buttons: Cancel, Back, Assign

Salesforce Developer Session | artificialintelligence-d-dev-ed.lightning.force.com | 128 Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce: V | Reset Password | Salesforce | Finish update

Setup Home Object Manager

Search Setup

user

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Service

Embedded Service

Messaging for In-App and Web User Verification

User Interface

Action Link Templates

Actions & Recommendations

App Menu

Recently Viewed | customers |

Done

1 assignments were successful.

salesmanager

Assignment Summary

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

customers Recently Viewed

0 items • Updated a few seconds ago

customer Name

LIST VIEW CONTROLS

New

Clone

Rename

Sharing Settings

Show List Filters

Select Fields to Display

Delete

Reset Column Widths

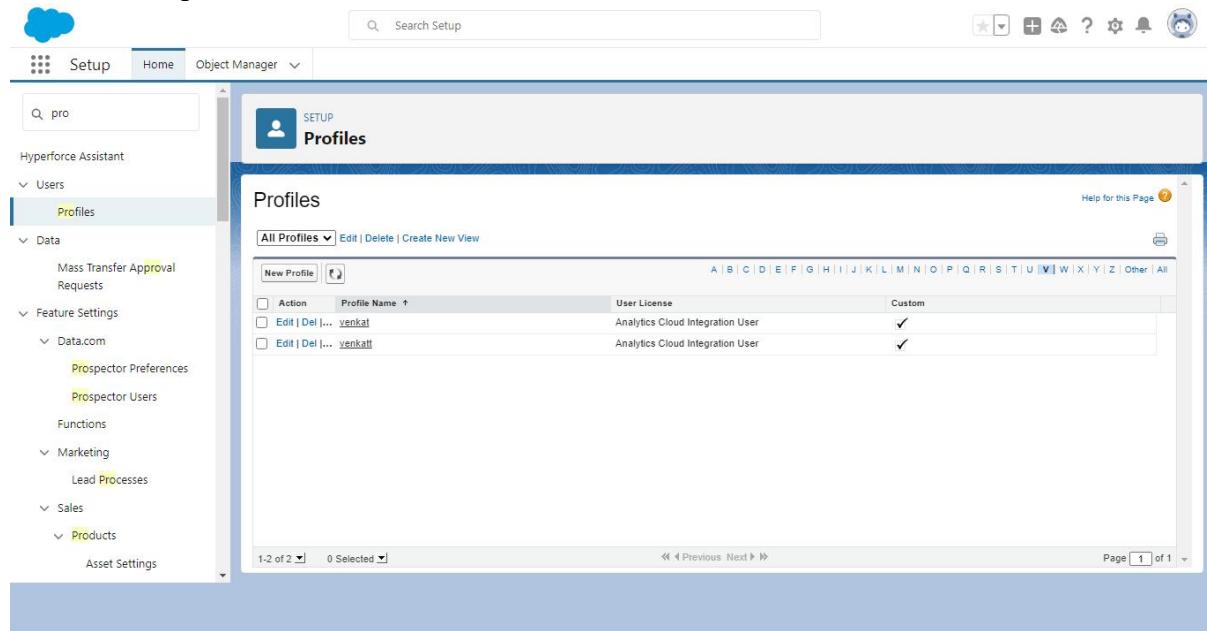
You haven't viewed any customers recently.
Try switching list views.

javaScript:void(0)

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

Solution:

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



The screenshot shows the Salesforce Setup interface with the 'Profiles' page selected. The left sidebar shows various setup categories like Hyperforce Assistant, Users, Data, Feature Settings, Data.com, Marketing, Sales, and Products. The main content area displays a table of profiles. The table has columns for Action, Profile Name, User License, and Custom. There are two entries: 'Analytics Cloud Integration User' and 'Custom', both associated with the API name 'venkati'.

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

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 venkat 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.

Setup Home Object Manager

New Custom Object

Help for this Page ⓘ

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

Custom Object Definition Edit Save Save & New Cancel

Custom Object Information ! = Required Information

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

Label Example: Account

Plural Label Example: Accounts

Starts with vowel sound

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

Object Name Example: Account

Description

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

Content Name

Enter Record Name Label and Format

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

Record Name Example: Account Name

Data Type

Optional Features

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

Object Classification

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

Allow Sharing
 Allow Bulk API Access
 Allow Streaming API Access

Deployment Status

In Development Deployed

Search Status

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

Allow Search

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

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

Save Save & New Cancel

The screenshot shows the Salesforce Object Manager interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager'. The main title is 'Object Manager' with a 'SETUP' icon. Below the title, it says 'New Custom Object'. A message bar at the top indicates that permissions for the object are disabled by default. The main form is titled 'Custom Object Definition Edit' and contains sections for 'Custom Object Information', 'Enter Record Name Label and Format', 'Optional Features', 'Object Classification', 'Deployment Status', 'Search Status', and 'Object Creation Options'. The 'Custom Object Information' section includes fields for 'Label' (Department), 'Plural Label' (Departments), and 'Description'. The 'Record Name' field is set to 'Department Name' with 'Text' as the data type. Under 'Optional Features', several checkboxes are listed, with 'Allow Sharing', 'Allow Bulk API Access', and 'Allow Streaming API Access' checked. In the 'Object Classification' section, 'Allow Sharing' is checked. The 'Deployment Status' section shows 'Deployed' is selected. The 'Search Status' section has 'Allow Search' unchecked. The 'Object Creation Options' section has two checkboxes: 'Add Notes and Attachments related list to default page layout' and 'Launch New Custom Tab Wizard after saving this custom object', both of which are unchecked. At the bottom right of the form are 'Save', 'Save & New', and 'Cancel' buttons.

Step 4

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

Step 5:

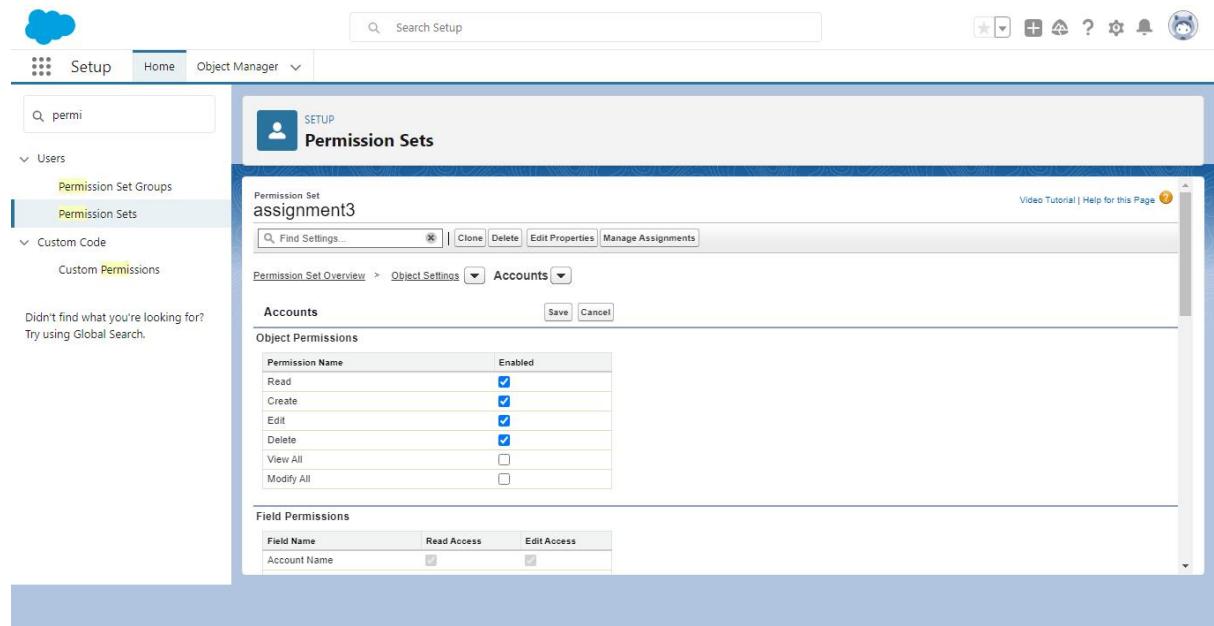
Now create two users by enter into the Setup-quick search[user] and then click on new user after clicking that you need to create two user along with the profile as Jaga which we have created on the step 2.once the one user has been created click on the save&new so that you can create the second user and there the user name can been created with alternate name but with the same user profile and once the two user are create click on save.

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

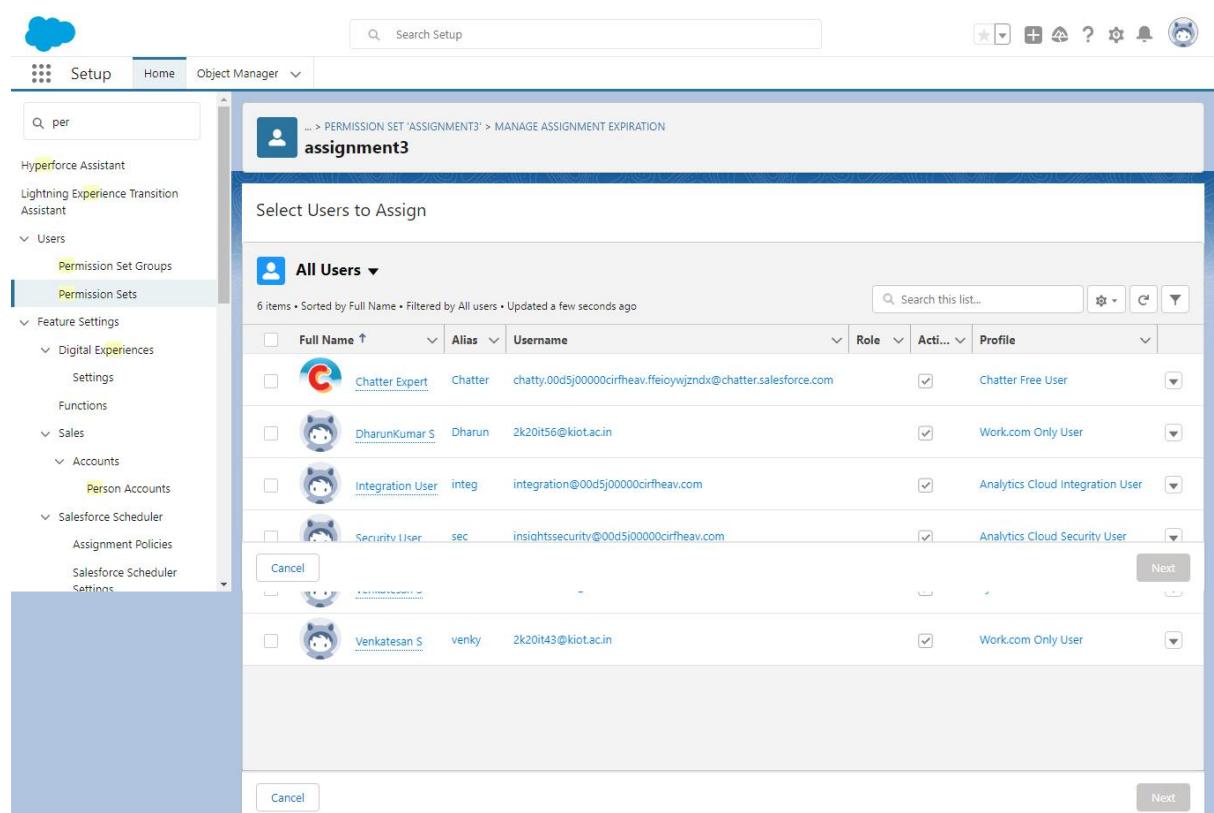
Step 6:

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

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



The screenshot shows the Salesforce Setup interface. In the left sidebar, under 'Users', 'Permission Sets' is selected. The main area displays the 'Permission Set assignment3' configuration page. It includes sections for 'Object Permissions' (listing permissions like Read, Create, Edit, Delete) and 'Field Permissions' (listing permissions for specific fields like Account Name). The 'Accounts' tab is selected in the navigation bar.



The screenshot shows the 'Select Users to Assign' screen for the 'assignment3' permission set. The left sidebar shows the 'Permission Sets' section selected. The main area lists 'All Users' with checkboxes. The users listed are Chatter Expert, DharunKumar S, Integration User, Security User, and Venkatesan S. The 'Next' button is visible at the bottom right.

... > PERMISSION SET 'ASSIGNMENT3' > MANAGE ASSIGNMENT EXPIRATION
assignment3

Select an Expiration Option For Assigned Users

No expiration date ?

Specify the expiration date ?

Time Zone ? Select a time zone...

Full Name	Role	Profile	Active	User License	Expires On
Venkatesan S		Work.com Only User	✓	Work.com Only	Never Expires

Cancel Back Assign

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.

SETUP

Permission Set
assignment3

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

Object Settings | Accounts

Accounts | Save | Cancel

Object Permissions

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

Field Permissions

Field Name	Read Access	Edit Access
Account Name	<input type="checkbox"/>	<input checked="" type="checkbox"/>

... > PERMISSION SET 'ASSIGNMENT3' > MANAGE ASSIGNMENT EXPIRATION
assignment3

Select Users to Assign

All Users

Full Name ↑	Alias	Username	Role	Acti...	Profile
Chatter Expert	Chatter	chatty.00d5j00000cirfheav.ffeioywjzndx@chatter.salesforce.com	<input checked="" type="checkbox"/>	Chatter Free User	
DharunKumar S	Dharun	2k20it56@kiot.ac.in	<input checked="" type="checkbox"/>	Work.com Only User	
Integration User	integ	integration@00d5j00000cirfheav.com	<input checked="" type="checkbox"/>	Analytics Cloud Integration User	
Security User	sec	insightssecurity@00d5j00000cirfheav.com	<input checked="" type="checkbox"/>	Analytics Cloud Security User	
Venkatesan S	venky	2k20it43@kiot.ac.in	<input checked="" type="checkbox"/>	Work.com Only User	

Cancel Next

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.

... > PERMISSION SET 'PERMISSION12' > MANAGE ASSIGNMENT EXPIRATION
permission12

Select Users to Assign

All Users

Full Name ↑	Alias	Username	Role	Active	Profile
Jagadesh S	JS	w0w@gmail.com	SF Admin	<input checked="" type="checkbox"/>	System Administrator
Jagadesh S	JS	jaga1117@gmail.com	Channel Sales Team	<input type="checkbox"/>	Standard Platform User
<input checked="" type="checkbox"/> Jagadesh11 S	js	jww123@gmail.com	Director, Channel Sales	<input checked="" type="checkbox"/>	Jaga
Jagadesh22 S	js	jaa1@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Jaga

Cancel Next

Now click on Assign.

The screenshot shows the Salesforce Setup interface. The left sidebar has a tree view with nodes like Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, ADMINISTRATION, Users, Permission Set Groups, and Permission Sets (which is currently selected). The main content area is titled 'Current Assignments' for a user named 'assignment31'. It shows a table with the following data:

Full Name	Active	Role	Profile	User License	Expires On
Venkatesan S	✓	System Administrator	Salesforce		

There are also buttons for 'Edit' and 'Delete' at the top right of the table.

Now the specific access for the venkatesan s 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
Comment	Comment__c	Text Area(255)		
Created By	CreatedById	Lookup(User)		
Email	Email__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name__c	Text(125)		
Owner	OwnerId	Lookup(User,Group)	✓	
Rating	Rating__c	Picklist		
Survey result Name	Name	Text(80)	✓	

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.

Details

Email Template Name: Thank you Email - Survey

Description:

Made in Email Template Builder:

Message Content

Subject: Thank you for completing our survey !

Enhanced Letterhead:

```
Hi {{survey_results_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.

Additional Information

Created By: Venkatesan S, 03/10/2023, 2:25 pm

Last Modified By: Venkatesan S, 03/10/2023, 2:25 pm

Step 3: Create an Email Alert

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

The screenshot shows the Salesforce Setup interface. On the left, the navigation sidebar is open, showing various categories like Feature Settings, Chatter, Service, Process Automation, and Email Alerts. The 'Email Alerts' section is selected and highlighted in blue. The main content area displays a form titled 'Email Alert Survey - Thank You Email'. The form includes fields for Description (Survey - Thank You Email), Unique Name (Survey_Thank_You_Email), From Email Address (Current User's email address), Recipients (User_Integration_User), Additional Emails, Created By (Venkatesan S), and Modified By (Venkatesan S). Below the form, there are three sections: 'Rules Using This Email Alert' (alert is currently not used by any rules), 'Approval Processes Using This Email Alert' (alert is currently not used by any approval processes), and 'Entitlement Processes Using This Email Alert' (alert is currently not used by any entitlement processes). At the bottom of the page, there are links for 'Back To Top' and 'Always show me more records per related list'.

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.

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

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

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

Edit "Survey - Thank You Email" email alert

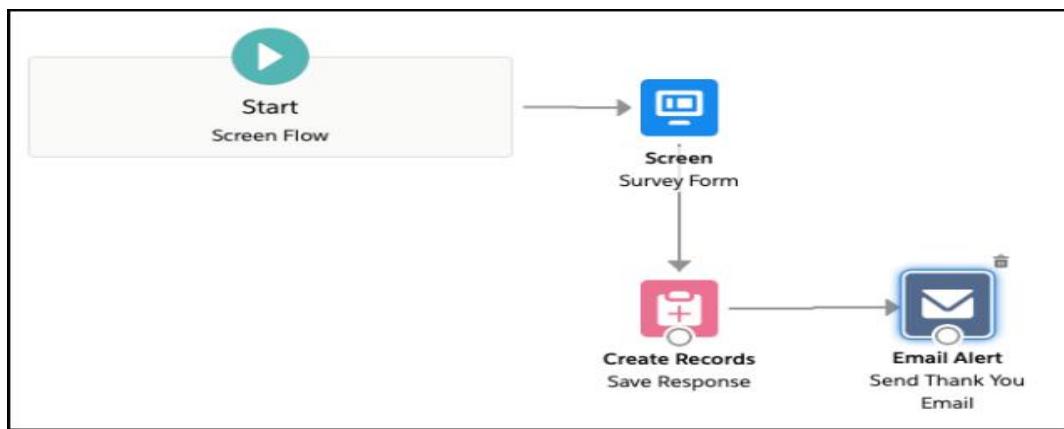
Use values from earlier in the flow to set the inputs for the "Survey - Thank You Email" email alert. To use its outputs later in the flow, store them in variables.

* Label	* API Name
Send Thank You Email	Send_Thank_You_Email
Description	
<pre>Ap * Record ID {!Save_Response}</pre>	

Set Input Values

Cancel **Done**

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



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

Save as

A New Version	A New Flow
* Flow Label Survey	* Flow API Name Survey
Description	
Hide Advanced How to Run the Flow i User or System Context—Depends on How Flow is Launched	
* Type Screen Flow	
* API Version for Running the Flow 51	
Interview Label i Insert a resource... 🔍 Survey {!\$Flow.CurrentDateTime}	
Last Modified 12/21/2020, 4:54 PM by Rakesh Gupta	
Status: Active	Type: Screen Flow
Version Number: 2	
Cancel Save	

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

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

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

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

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

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

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

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

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

1. In the Quick Find box, type **Visualforce Pages**.
2. Clicks on the **New** button.
3. Copy code from [GitHub](#) and paste it into your visualforce page
4. Click **Save**.

The screenshot shows the Visualforce Page 'Survey' in the Page Edit interface. The 'Page Information' tab is selected, displaying fields for Label (Survey), Name (Survey), and Description. Below these are checkboxes for 'Available for Lightning Experience, Experience Builder sites, and the mobile app' (checked) and 'Require CSRF protection on GET requests' (unchecked). The 'Visualforce Markup' tab is also visible, showing the following Apex code:

```

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

The screenshot shows the Site Edit screen for a site labeled 'Survey'. The 'Site Label' is set to 'Survey' and the 'Site Name' is also 'Survey'. The 'Site Description' field is empty. Under 'Site Contact', 'Default Record Owner' is set to 'Rakesh Gupta', and the 'Default Web Address' is 'http://katihar-developer-edition.gus.force.com/ survey'. The 'Active' section has 'Active Site Home Page' set to 'Survey' and 'Inactive Site Home Page' set to 'InMaintenance'. The 'Site Template' is 'SiteTemplate'. The 'Analytics Tracking Code' and 'URL Rewriter Class' fields are empty. Under 'Enable Feeds', the checkbox for 'Allow framing by the same origin only (Recommended)' is checked. The 'Clickjack Protection Level' is set to 'Require Secure Connections (HTTPS)'. The 'Lightning Features for Guest Users' checkbox is checked. Under 'Upgrade all requests to HTTPS', 'Enable Content Sniffing Protection', 'Enable Browser Cross Site Scripting Protection', and 'Referer URL Protection' are all checked. The 'Guest Access to the Payments API' checkbox is unchecked.

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