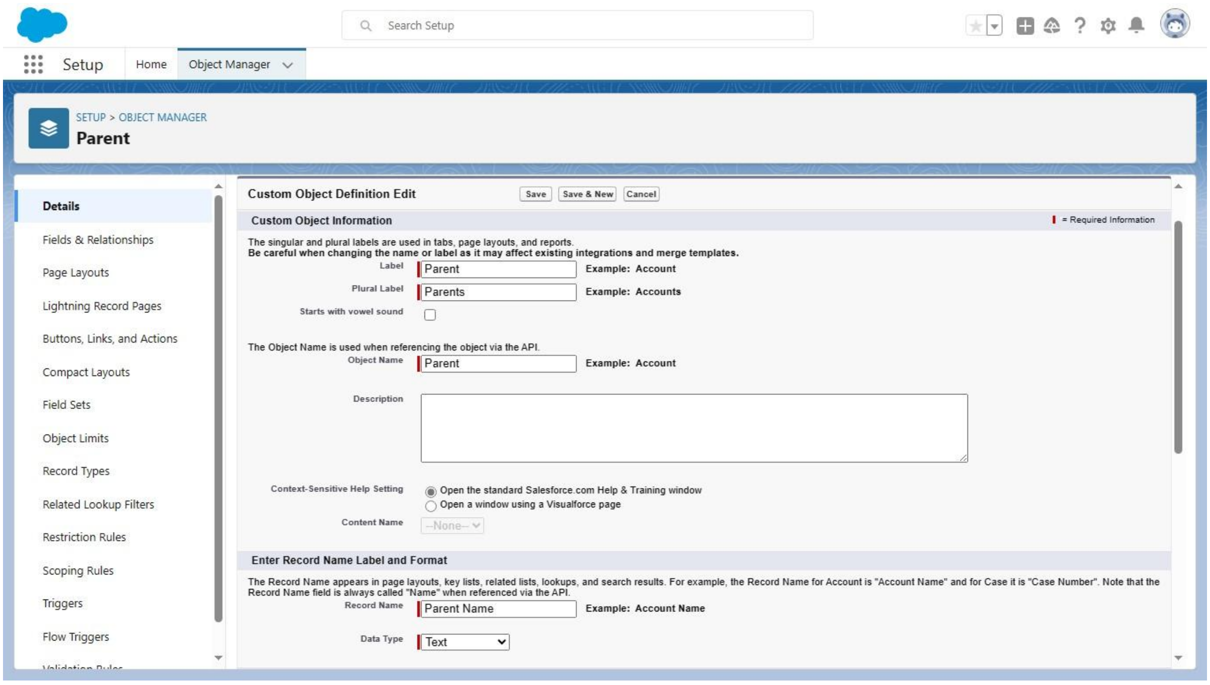
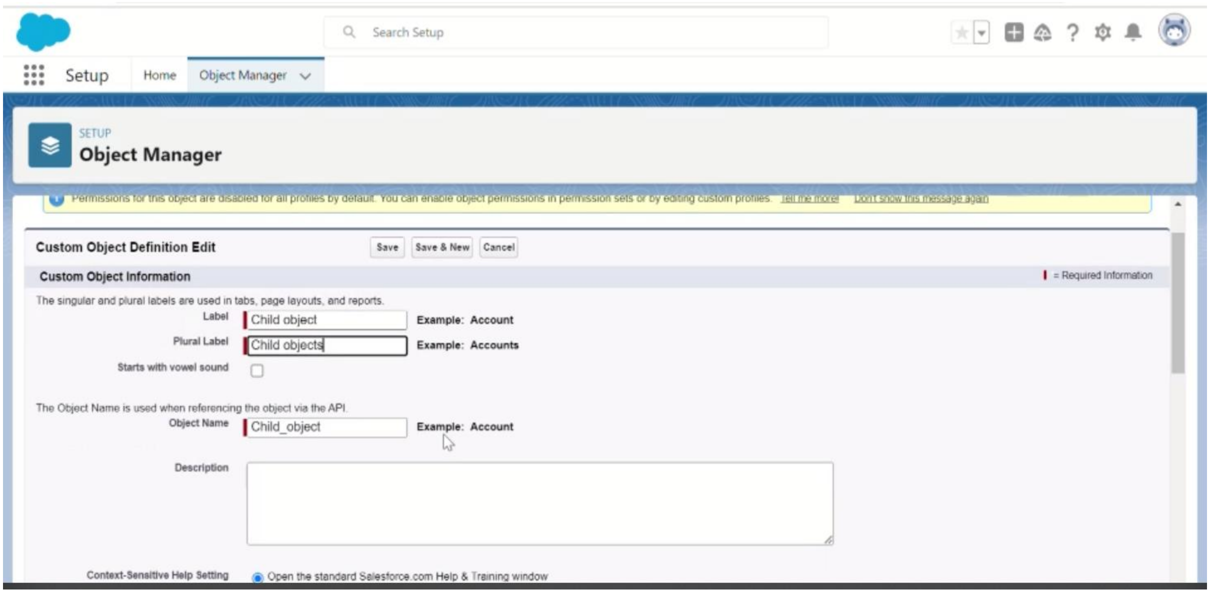
NAAN MUDHALVAN
Salesforce Developer (Course)
Assignment no 1

Name: Balaji S S
Year & Dep: IV year & CSBS
Batch: 2024
Zone no: Zone 8

1. Creating a Master-Detail Relationship between two custom objects and setting up a Roll-Up Summary Field to calculate the total number of records in the child object is a common task in Salesforce. Below are the steps to achieve this:

Step 1: Create Custom Objects.





Step 2: Create a Master-Detail Relationship

1. Go to "Setup" in Salesforce.

2. In the Quick Find box, type "Objects" and select "Objects and Fields" > "Objects".

3. Click on "Parent" to edit it.

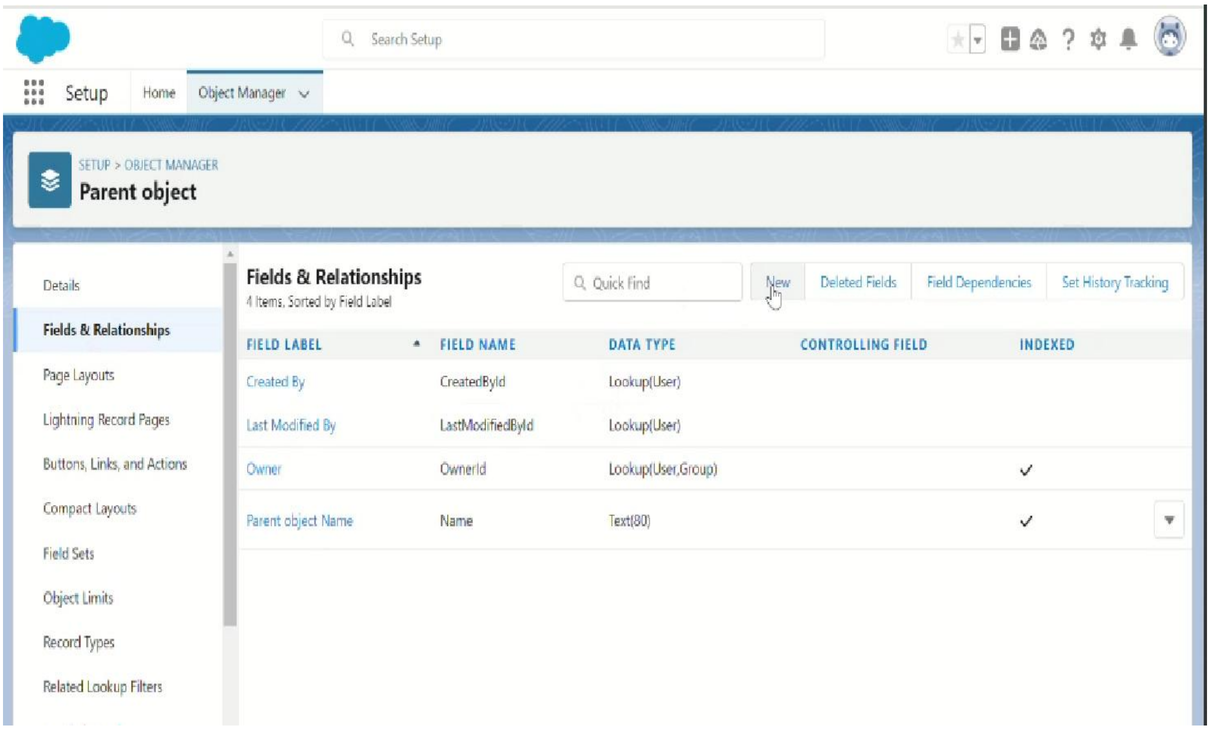
4. In the "Custom Fields & Relationships" section, click "New" under "Related To".

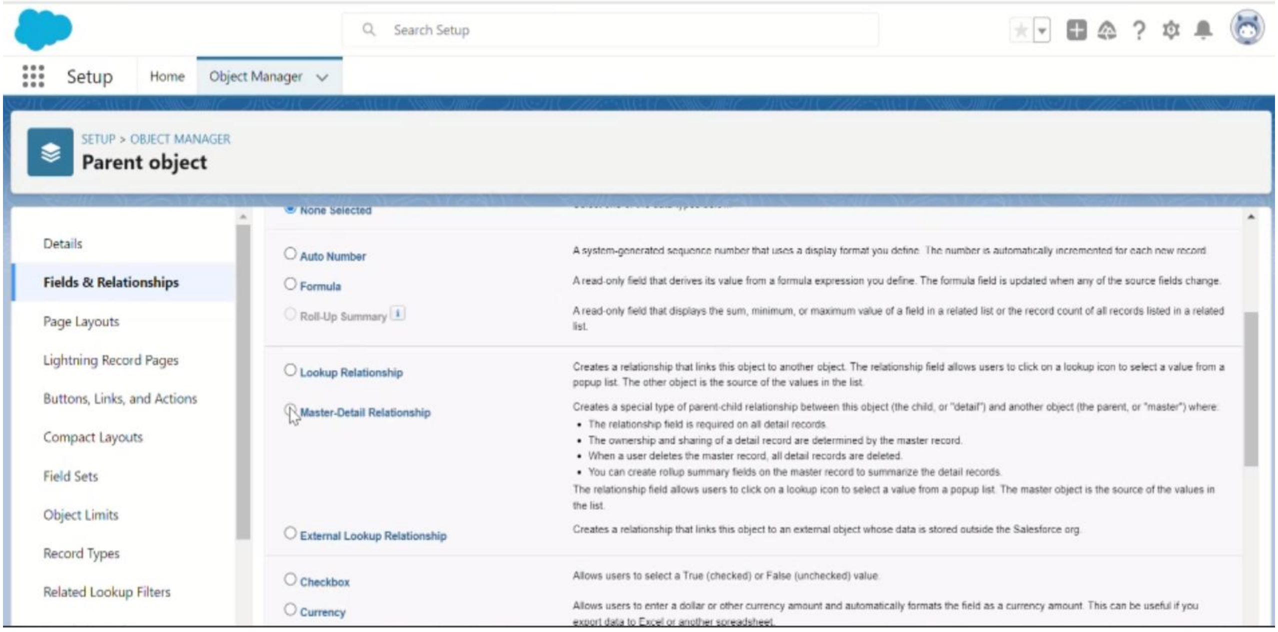
5. Choose "Master-Detail Relationship" as the data type.

6. In the "Related To" field, select "Child".

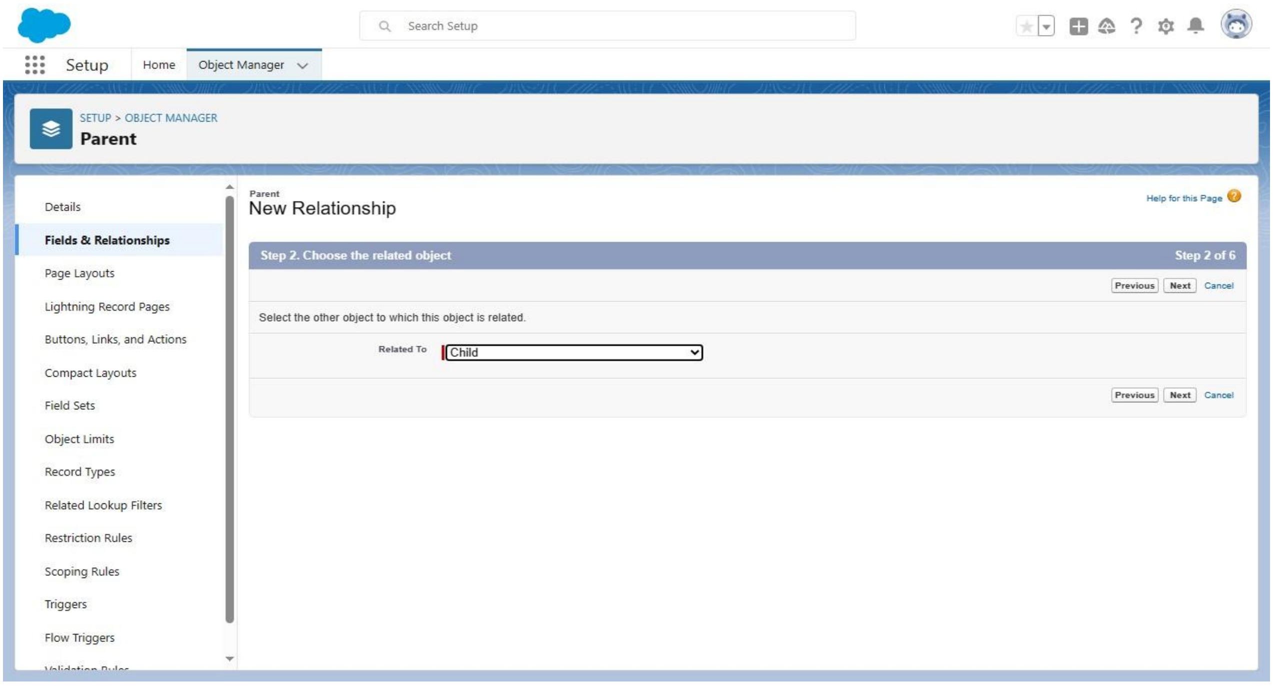
7. Configure other options as needed (e.g., setting the relationship name and whether it's required).

8. Save the changes.





Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Parent object
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
None Selected
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 popup list. The other object is the source of the values in the list.
Master-Detail Relationship
Creates a special 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.
When a user deletes the master record, all detail records are deleted.
You can create rollup summary fields on the master record to summarize the detail records.
The relationship field allows users to click on a lookup icon to select a value from a popup 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.
Checkbox
Allows users to select a True (checked) or False (unchecked) value.
Currency
Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.



Search Setup
Setup
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SETUP > OBJECT MANAGER
Parent
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
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Compact Layouts
Field Sets
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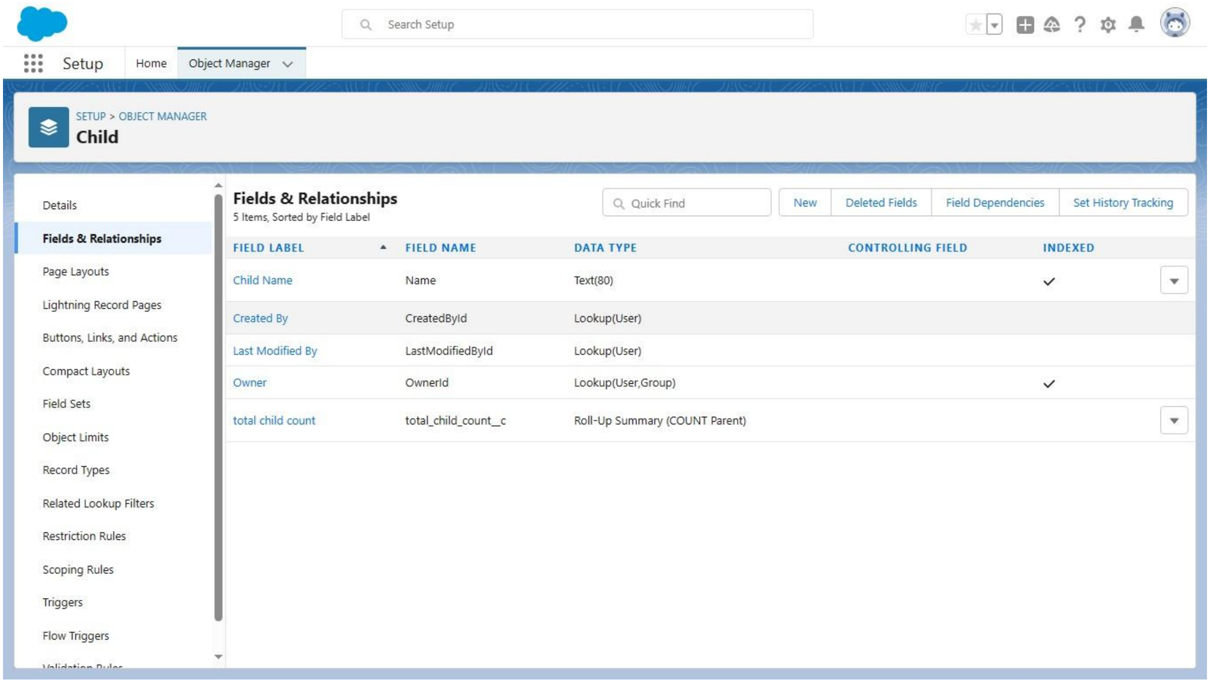
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Triggers
Flow Triggers
Parent
New Relationship
Help for this Page
Step 2. Choose the related object
Step 2 of 6
Previous
Next
Cancel
Select the other object to which this object is related.
Related To
Child
Previous
Next
Cancel


Search Setup
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SETUP > OBJECT MANAGER
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Fields & Relationships
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Compact Layouts
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Triggers
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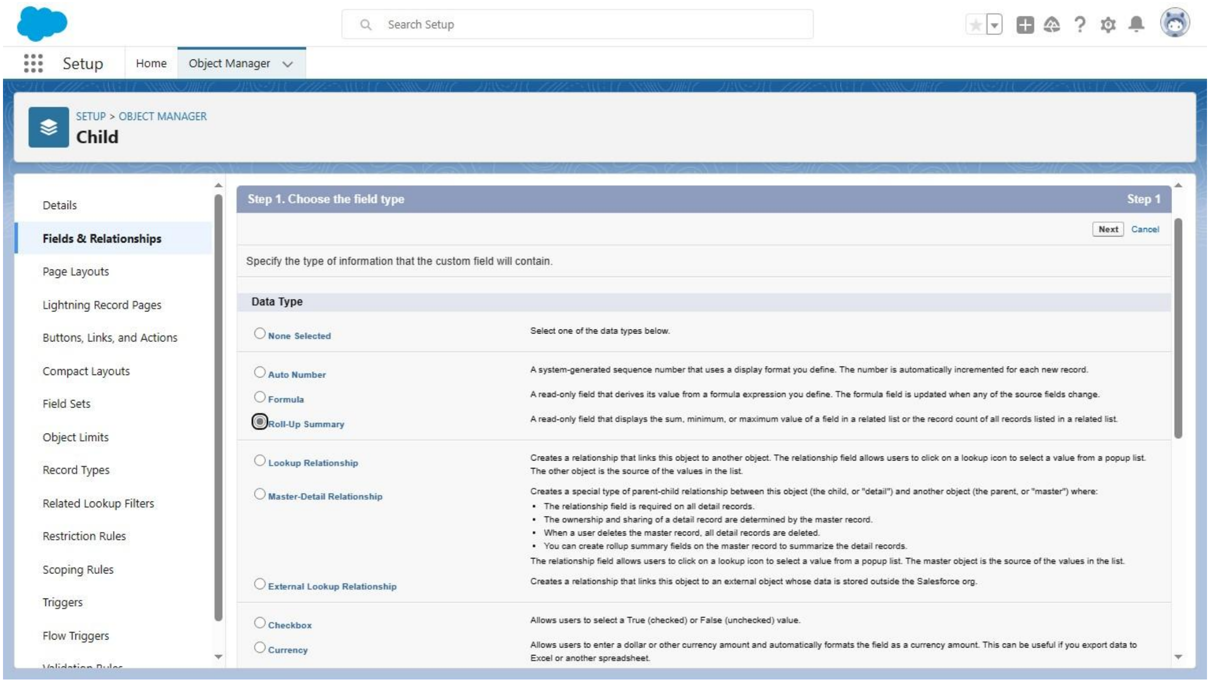
Fields & Relationships
5 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIELD
INDEXED
Child Name
Name
Text(80)
Created By
CreatedById
Lookup(User)
Last Modified By
LastModifiedById
Lookup(User)
Owner
OwnerId
Lookup(User,Group)
total child count
total_child_count__c
Roll-Up Summary (COUNT Parent)


Search Setup
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Object Manager
SETUP > OBJECT MANAGER
Child
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
Step 1. Choose the field type
Step 1
Next
Cancel
Specify the type of information that the custom field will contain.
Data Type
None Selected
Select one of the data types below.
Auto Number
A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
Formula
A read-only field that derives its value from a formula expression you define. 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.
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Currency
Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

Step 3: Create a Roll-Up Summary Field

1. In the same "Parent" editing page, scroll down to the "Roll-Up Summary Fields" section.

2. Click "New Roll-Up Summary Field."

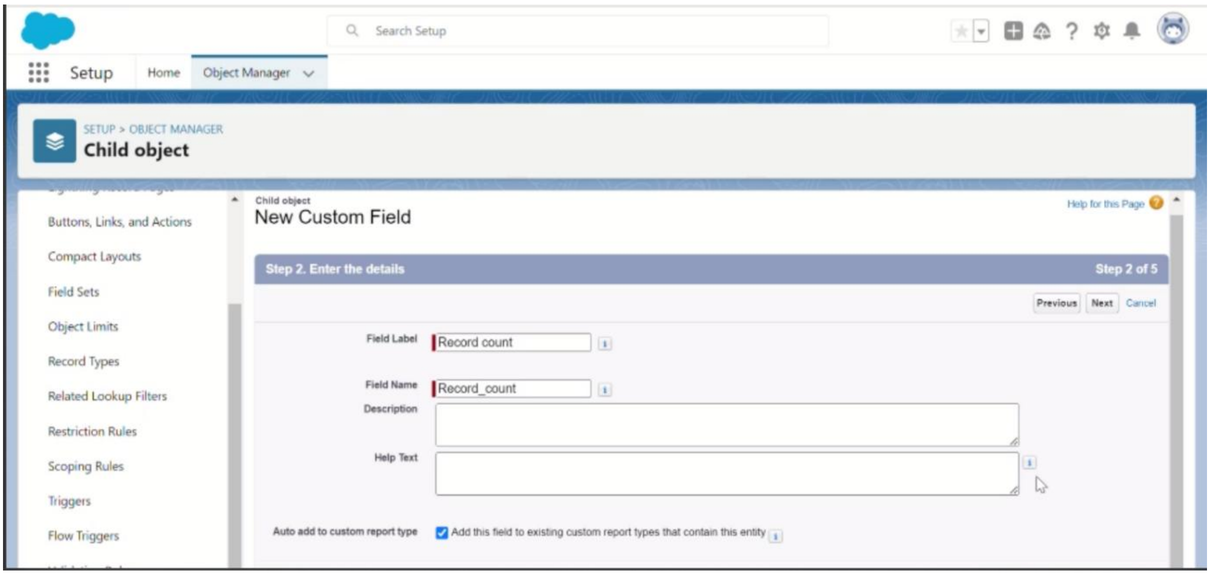
3. Choose the "Child" as the child object for which you want to calculate the total.

4. Give your Roll-Up Summary Field a name (e.g., "Total_Child_Records__c").

5. Choose the type of calculation you want (e.g., "COUNT").

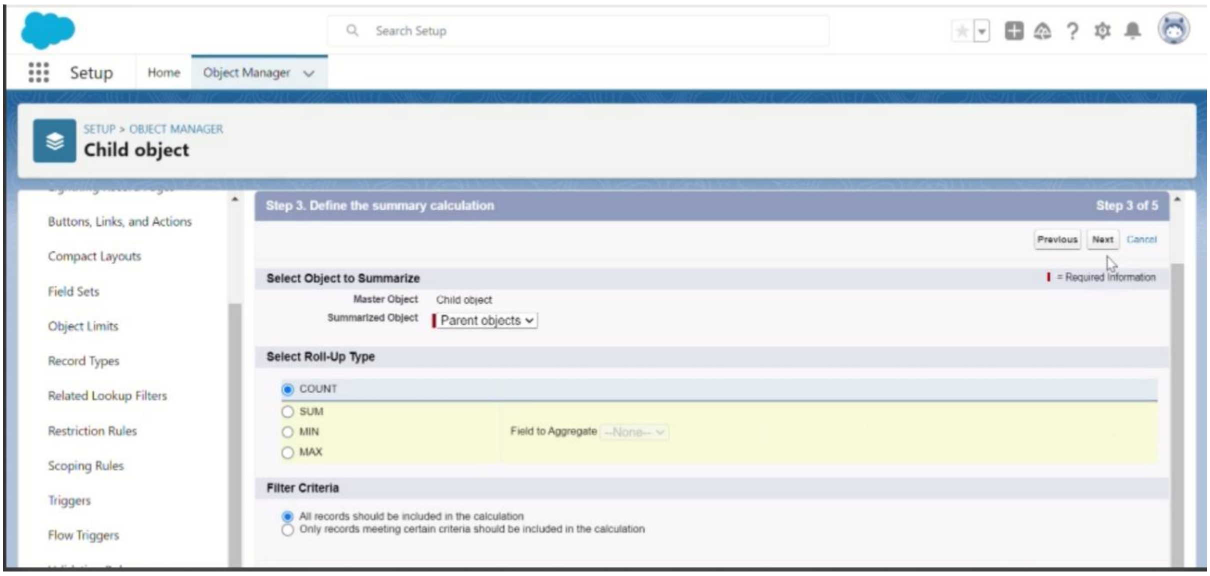
6. Configure any additional filter criteria if needed.

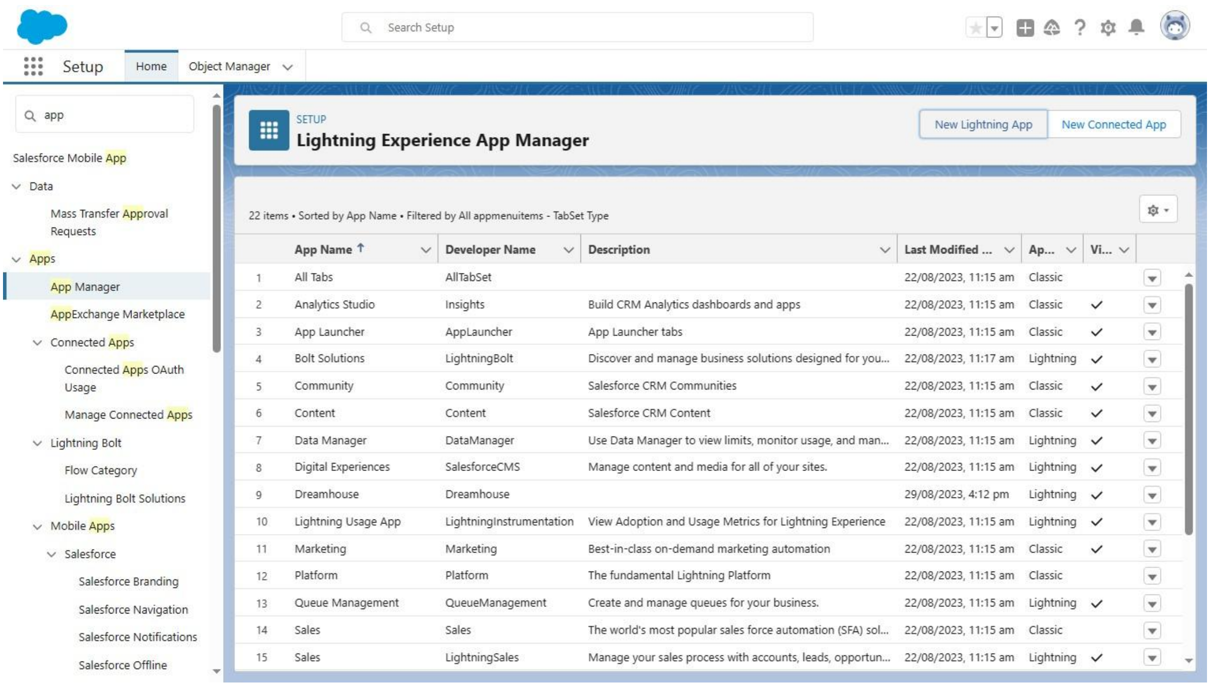
7. Save the changes.

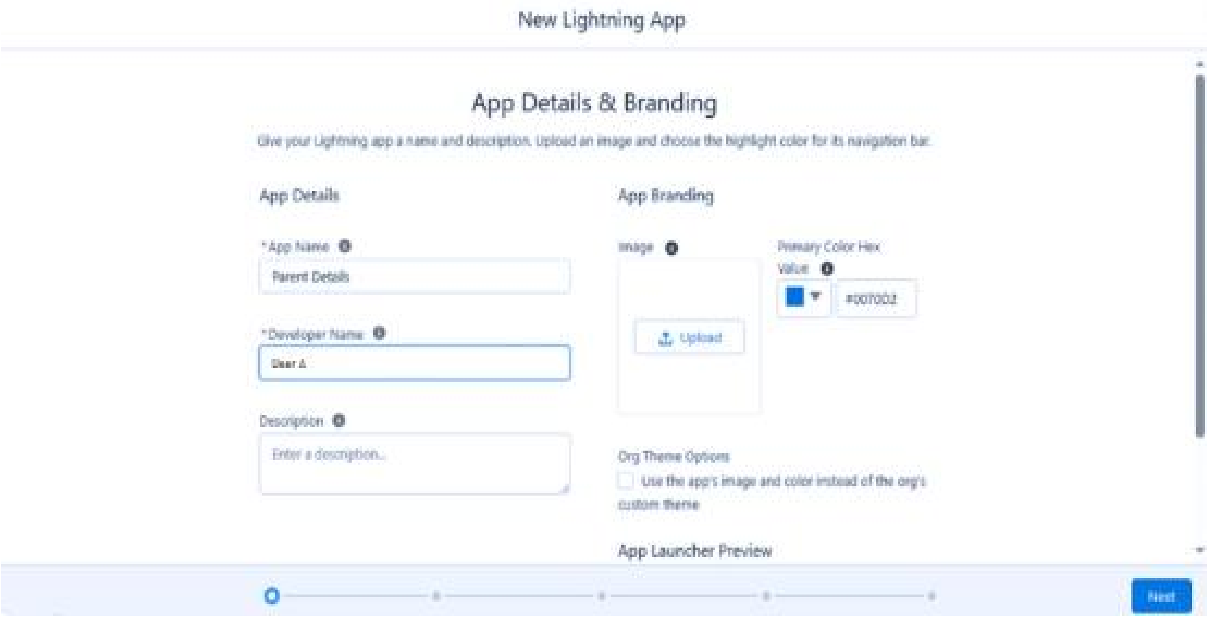


Step 4: Update Page Layouts and Record Types (if necessary)

Depending on your use case, you may want to update page layouts and record types to make sure the new relationship and fields are displayed correctly to your users.


Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Child object
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Triggers
Flow Triggers
Step 3. Define the summary calculation
Step 3 of 5
Previous
Next
Cancel
Select Object to Summarize
= Required Information
Master Object
Child object
Summarized Object
Parent objects
Select Roll-Up Type
COUNT
SUM
MIN
MAX
Field to Aggregate
--None--
Filter Criteria
All records should be included in the calculation
Only records meeting certain criteria should be included in the calculation

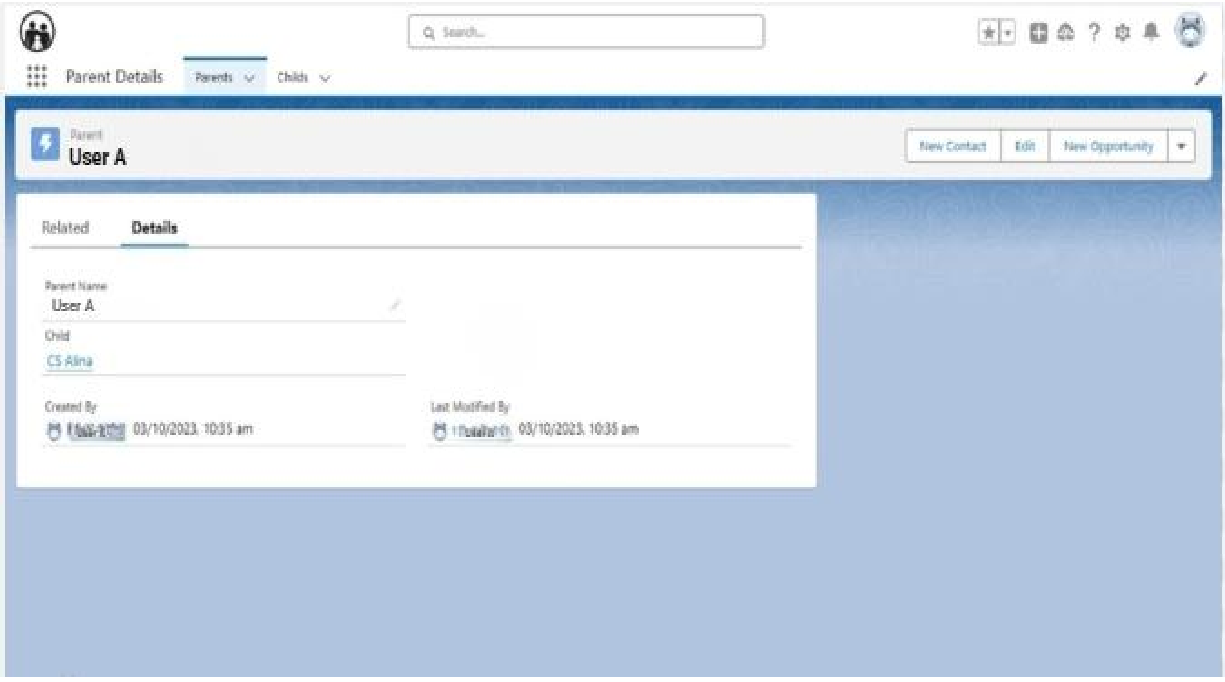

Search Setup
Setup
Home
Object Manager
app
Salesforce Mobile App
Data
Mass Transfer Approval Requests
Apps
App Manager
AppExchange Marketplace
Connected Apps
Connected Apps OAuth Usage
Manage Connected Apps
Lightning Bolt
Flow Category
Lightning Bolt Solutions
Mobile Apps
Salesforce
Salesforce Branding
Salesforce Navigation
Salesforce Notifications
Salesforce Offline
SETUP
Lightning Experience App Manager
New Lightning App
New Connected App
22 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type
App Name
Developer Name
Description
Last Modified ...
Ap...
Vi...
1 All Tabs AllTabSet 22/08/2023, 11:15 am Classic
2 Analytics Studio Insights Build CRM Analytics dashboards and apps 22/08/2023, 11:15 am Classic
3 App Launcher AppLauncher App Launcher tabs 22/08/2023, 11:15 am Classic
4 Bolt Solutions LightningBolt Discover and manage business solutions designed for you... 22/08/2023, 11:17 am Lightning
5 Community Community Salesforce CRM Communities 22/08/2023, 11:15 am Classic
6 Content Content Salesforce CRM Content 22/08/2023, 11:15 am Classic
7 Data Manager DataManager Use Data Manager to view limits, monitor usage, and man... 22/08/2023, 11:15 am Lightning
8 Digital Experiences SalesforceCMS Manage content and media for all of your sites. 22/08/2023, 11:15 am Lightning
9 Dreamhouse Dreamhouse 29/08/2023, 4:12 pm Lightning
10 Lightning Usage App LightningInstrumentation View Adoption and Usage Metrics for Lightning Experience 22/08/2023, 11:15 am Lightning
11 Marketing Marketing Best-in-class on-demand marketing automation 22/08/2023, 11:15 am Classic
12 Platform Platform The fundamental Lightning Platform 22/08/2023, 11:15 am Classic
13 Queue Management QueueManagement Create and manage queues for your business. 22/08/2023, 11:15 am Lightning
14 Sales Sales The world's most popular sales force automation (SFA) sol... 22/08/2023, 11:15 am Classic
15 Sales LightningSales Manage your sales process with accounts, leads, opportun... 22/08/2023, 11:15 am Lightning



Step 5: Test the Relationship and Roll-Up Summary Field

Create some records in both the Parent and Child objects and verify that the Roll-Up Summary Field correctly calculates the total number of related Child records on the Parent record.

That's it! You've successfully created a Master-Detail relationship between two custom objects (Parent and Child) and set up a Roll-Up Summary Field to calculate the total number of records in the Child object.



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 th Security for the users.

Step 1: Create a Public Group

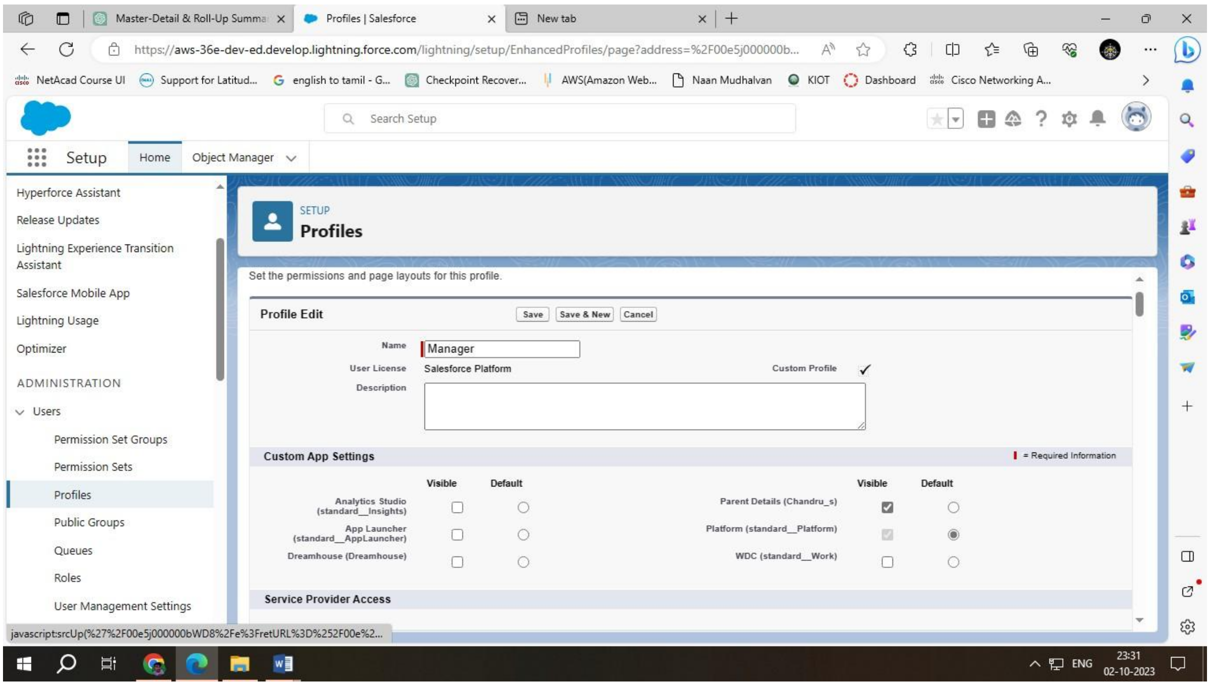
1. Go to "Setup" in Salesforce.

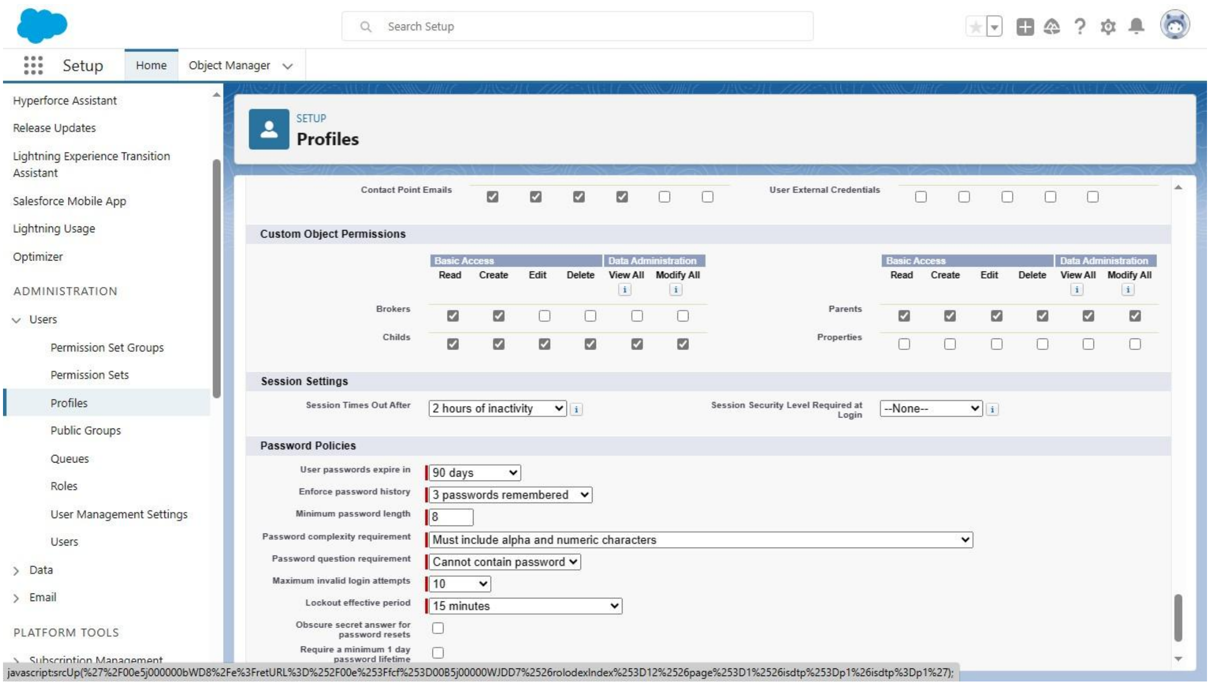
2. In the Quick Find box, type "Public Groups" and select it.

3. Click on "New Public Group."

4. Create a group for User A, let's call it "UserA_Group," and add User A to this group.

5. Create another group for User B, let's call it "UserB_Group," and add User B to this group.





Step 2: Create Criteria-Based Sharing Rules

For User A:1. Go to "Setup" in Salesforce.

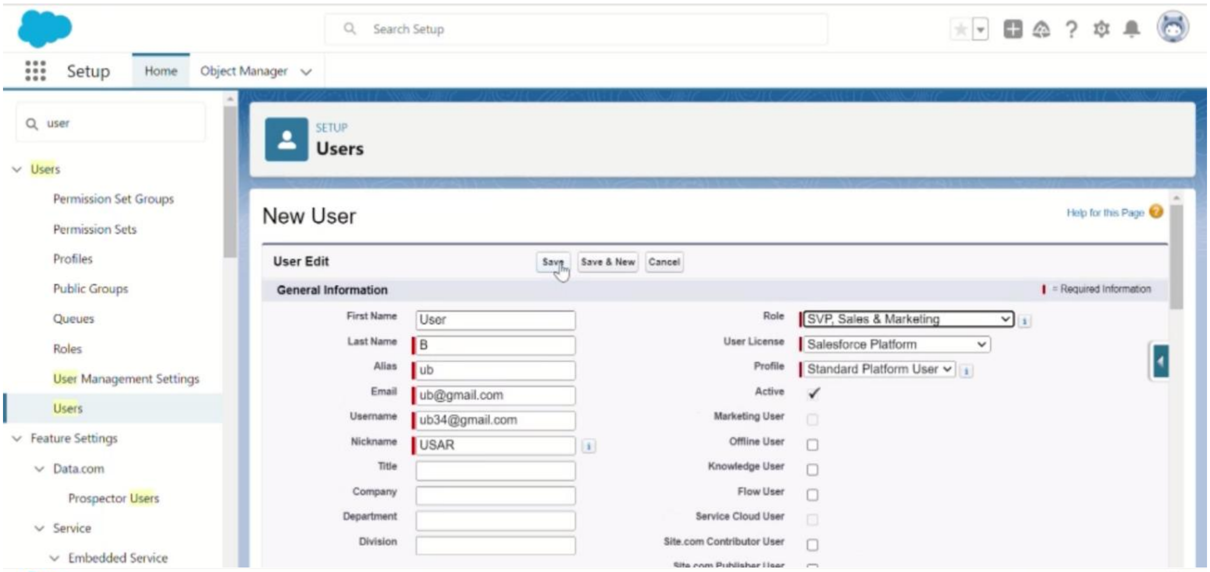
2. In the Quick Find box, type "Sharing Rules" and select "Sharing Settings."

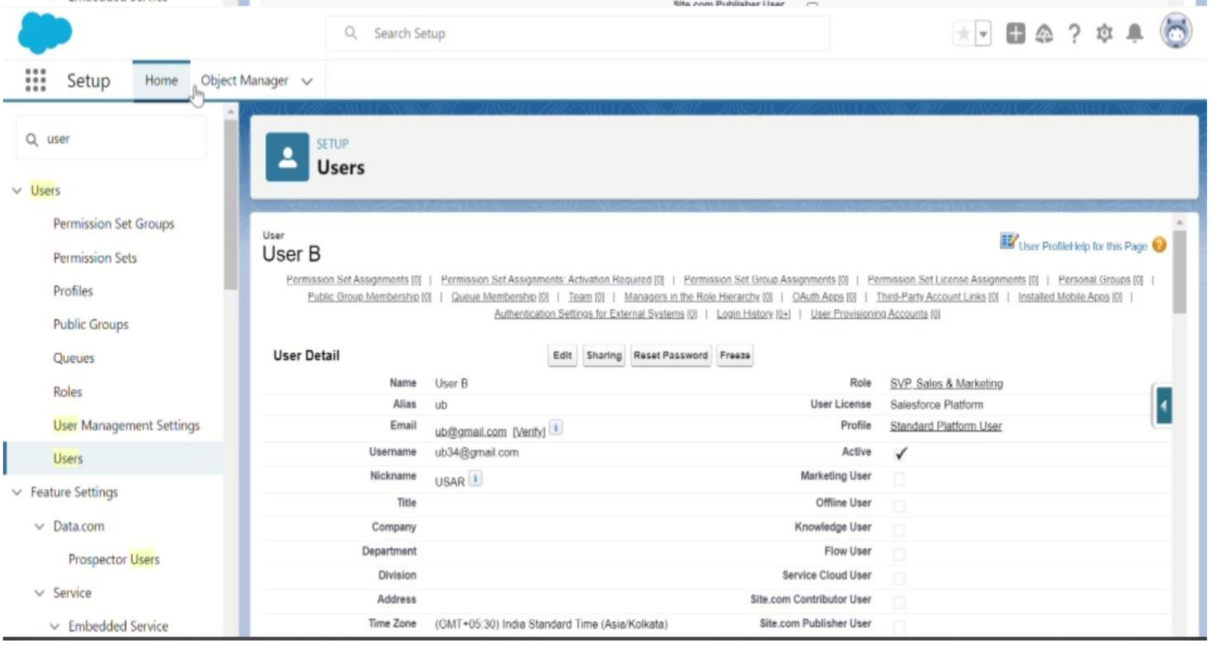
3. Under "Account Sharing Rules," click on "New Sharing Rule."

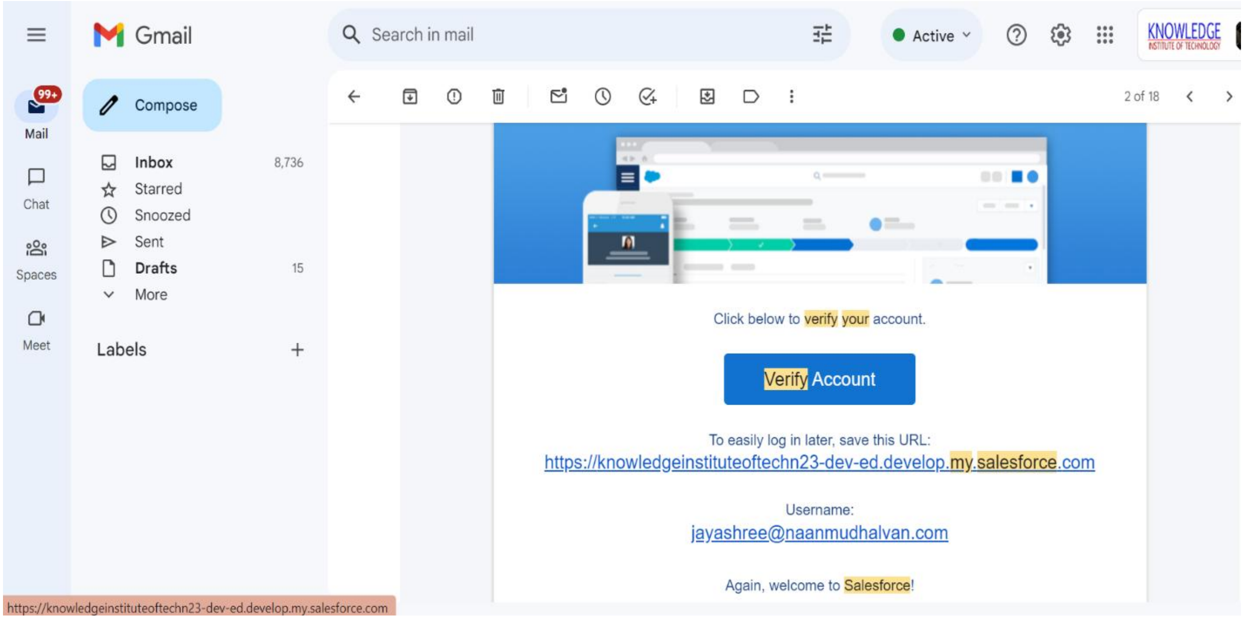
4. Create a rule that shares records owned by members of "UserB_Group" with the "UserA_Group."

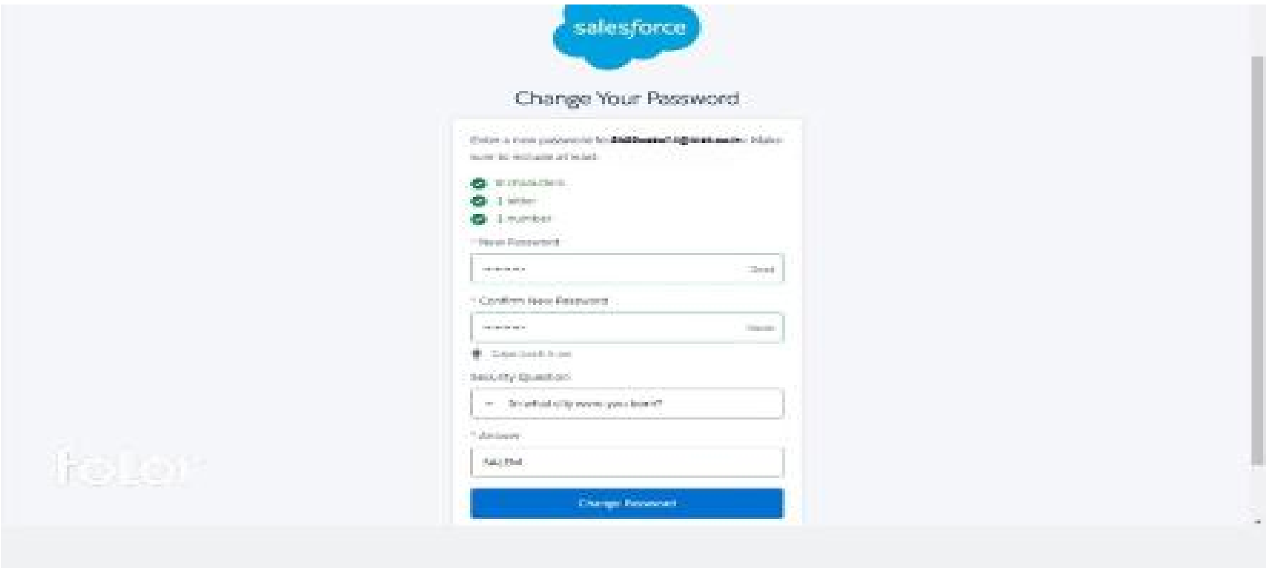
5. Define the criteria based on which records should be shared (e.g., ownership).

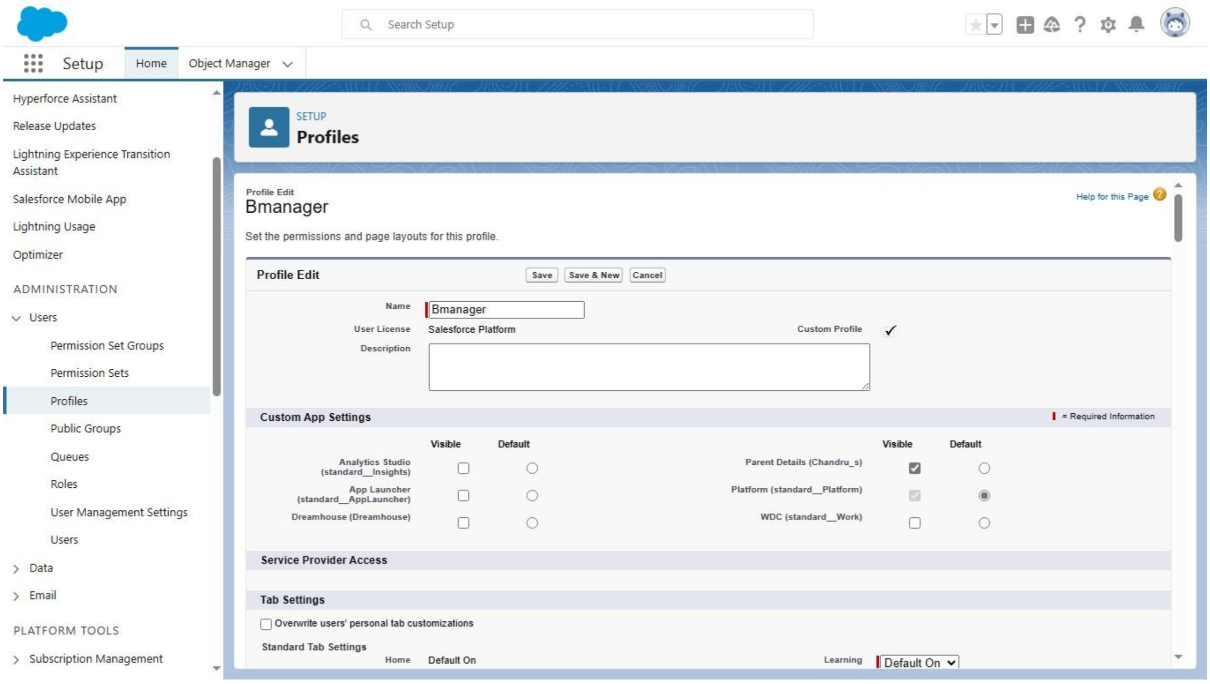
6. Save the sharing rule.

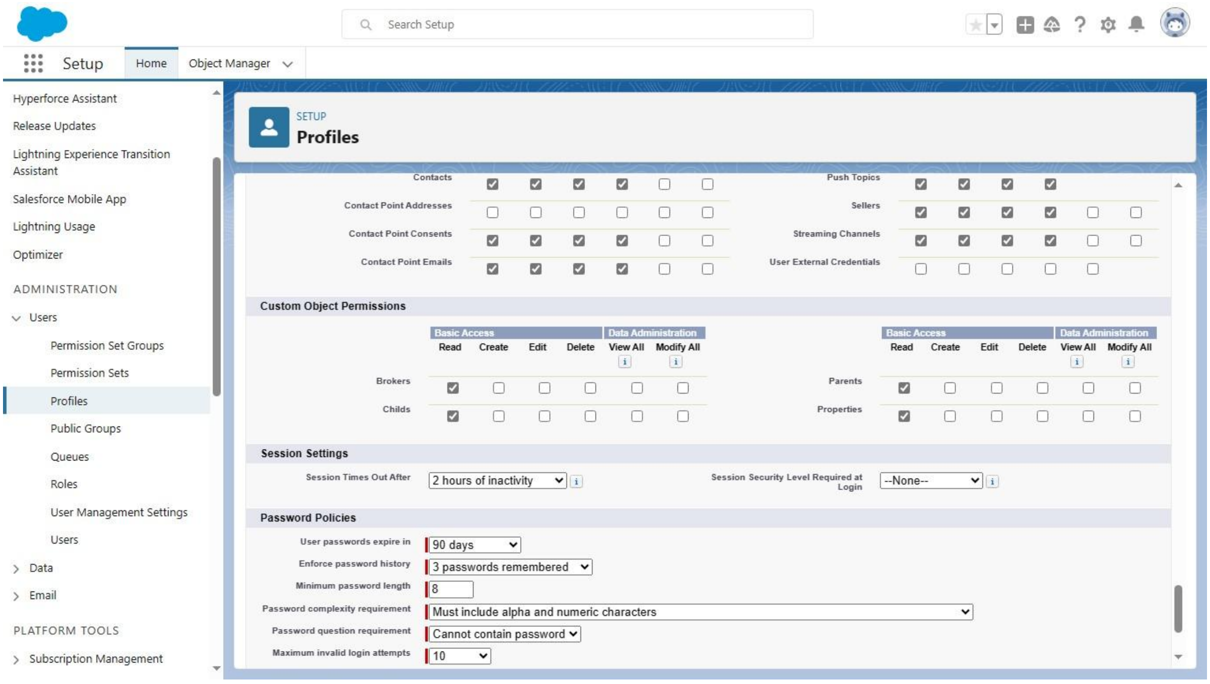





Gmail
Search in mail
Active
KNOWLEDGE
Compose
Mail
Chat
Spaces
Meet
Inbox 8,736
Starred
Snoozed
Sent
Drafts 15
More
Labels
2 of 18
Click below to verify your account.
Verify Account
To easily log in later, save this URL:
https://knowledgeinstituteoftechn23-dev-ed.develop.my.salesforce.com
Username:
jayashree@naanmudhalvan.com
Again, welcome to Salesforce!
https://knowledgeinstituteoftechn23-dev-ed.develop.my.salesforce.com


salesforce
Change Your Password





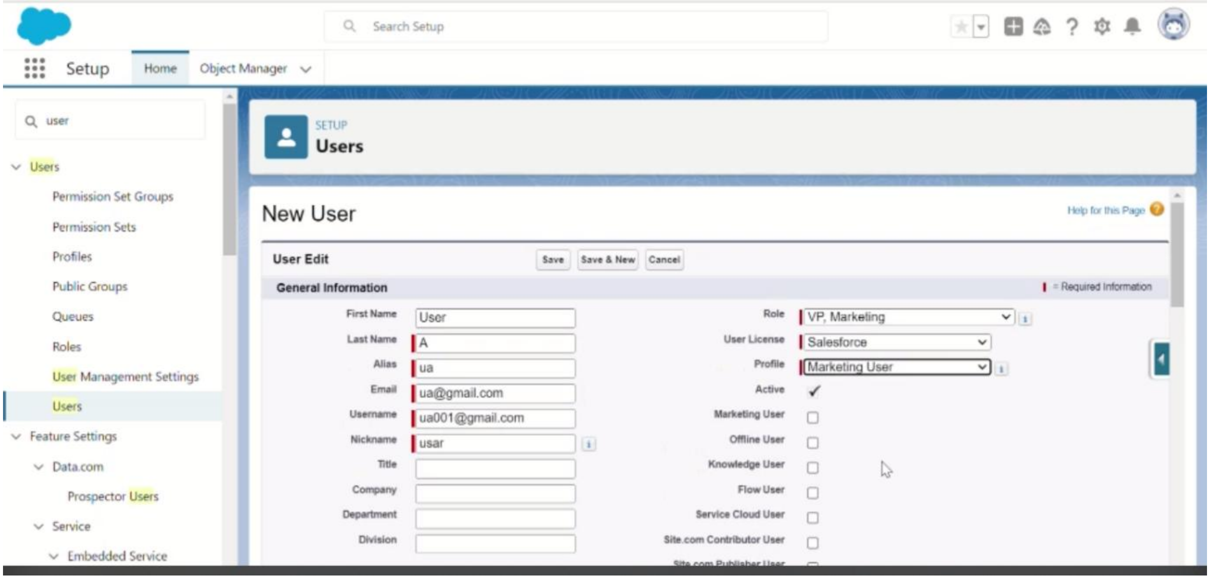
For User B:

1. Follow the same steps as above but create a separate sharing rule for User B.

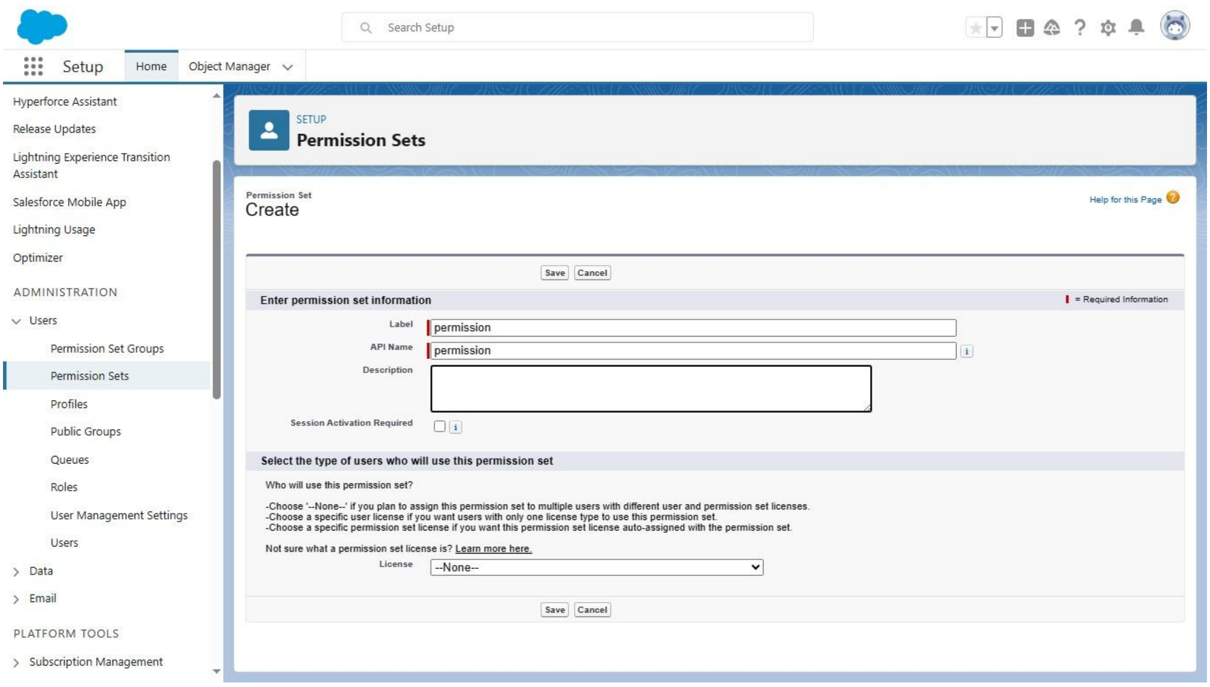
2. This rule should share records owned by members of "UserA_Group" with the "UserB_Group."

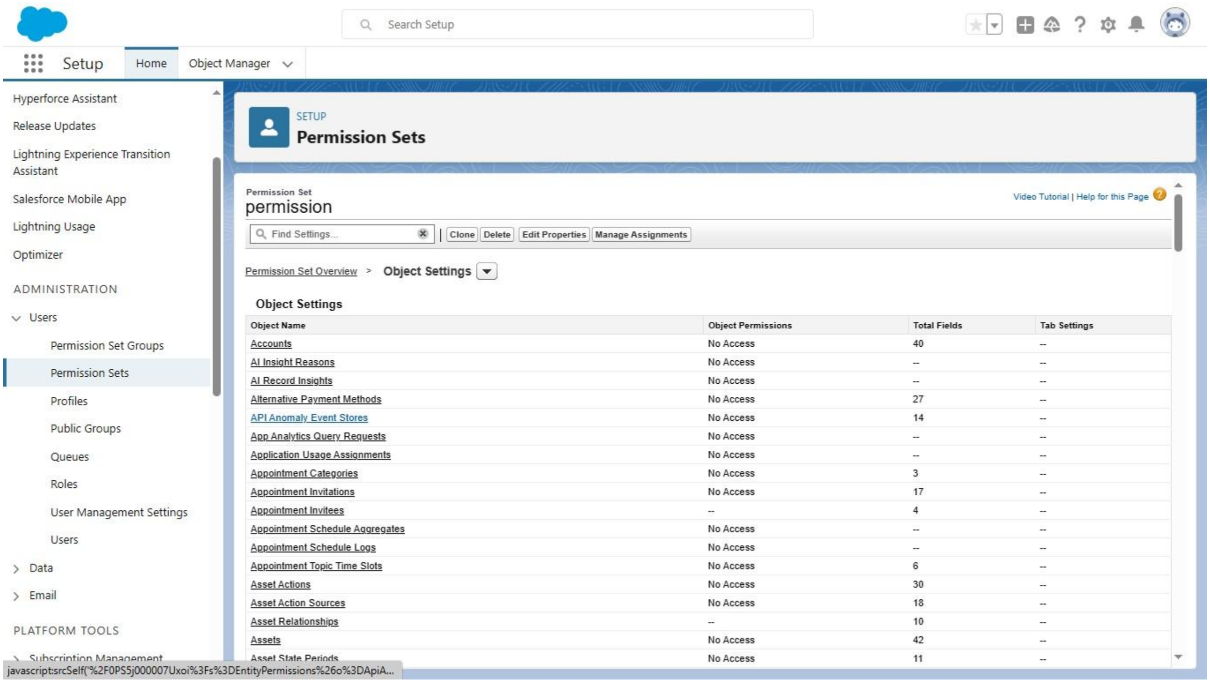
3. Define the criteria based on which records should be shared.

4. Save the sharing rule.



Step 3: Assign Records Ownership




Search Setup
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Lightning Experience Transition Assistant
Salesforce Mobile App
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Permission Set Groups
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Edit Properties
Manage Assignments
Permission Set Overview > Object Settings
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Total Fields
Tab Settings
Accounts No Access 40 --
AI Insight Reasons No Access -- --
AI Record Insights No Access -- --
Alternative Payment Methods No Access 27 --
API Anomaly Event Stores No Access 14 --
App Analytics Query Requests No Access -- --
Application Usage Assignments No Access -- --
Appointment Categories No Access 3 --
Appointment Invitations No Access 17 --
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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 --
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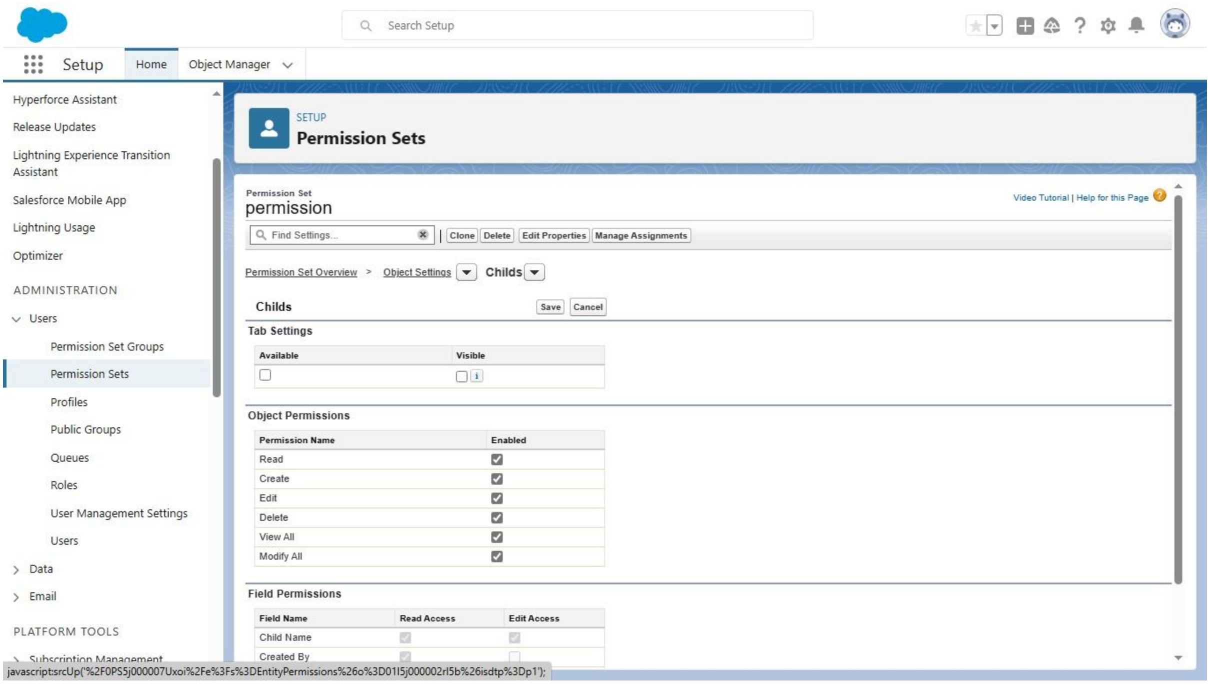
Search Setup
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Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Permission Set Groups
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PLATFORM TOOLS
SETUP
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Permission Set
permission
Video Tutorial | Help for this Page
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Edit Properties
Manage Assignments
Permission Set Overview > Object Settings Childs
Childs
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Tab Settings
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Object Permissions
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Modify All
Field Permissions
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Edit Access
Child Name
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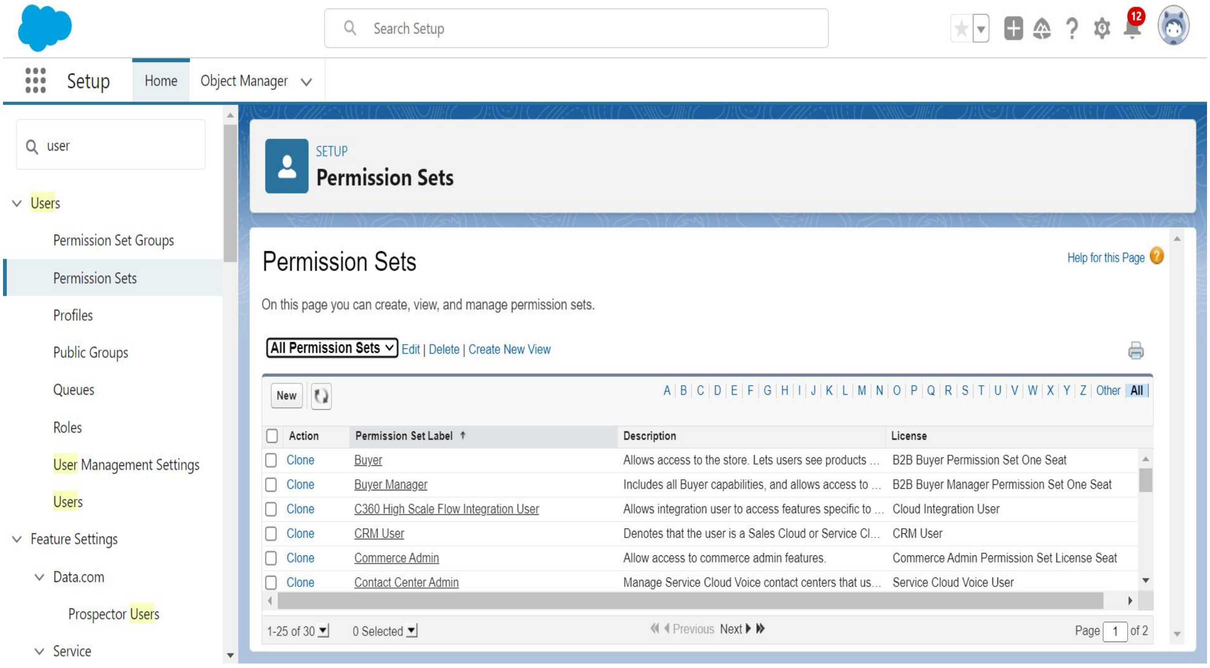
Search Setup
Setup
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user
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Prospector Users
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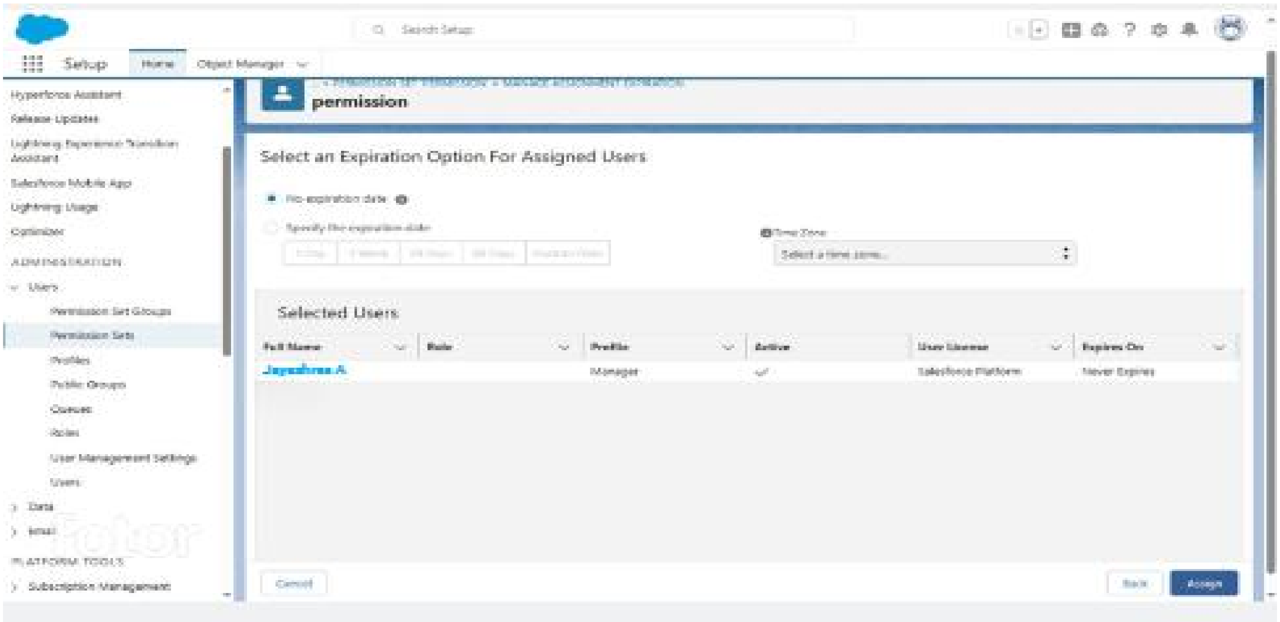
Permission Sets
Help for this Page
On this page you can create, view, and manage permission sets.
All Permission Sets
Edit | Delete | Create New View
New
A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All
Action | Permission Set Label | Description | License
Clone | Buyer | Allows access to the store. Lets users see products ... | B2B Buyer Permission Set One Seat
Clone | Buyer Manager | Includes all Buyer capabilities, and allows access to ... | B2B Buyer Manager Permission Set One Seat
Clone | C360 High Scale Flow Integration User | Allows integration user to access features specific to ... | Cloud Integration User
Clone | CRM User | Denotes that the user is a Sales Cloud or Service Cl... | CRM User
Clone | Commerce Admin | Allow access to commerce admin features. | Commerce Admin Permission Set License Seat
Clone | Contact Center Admin | Manage Service Cloud Voice contact centers that us... | Service Cloud Voice User
1-25 of 30
0 Selected
Previous
Next
Page 1 of 2


Setup
Home
Object Manager
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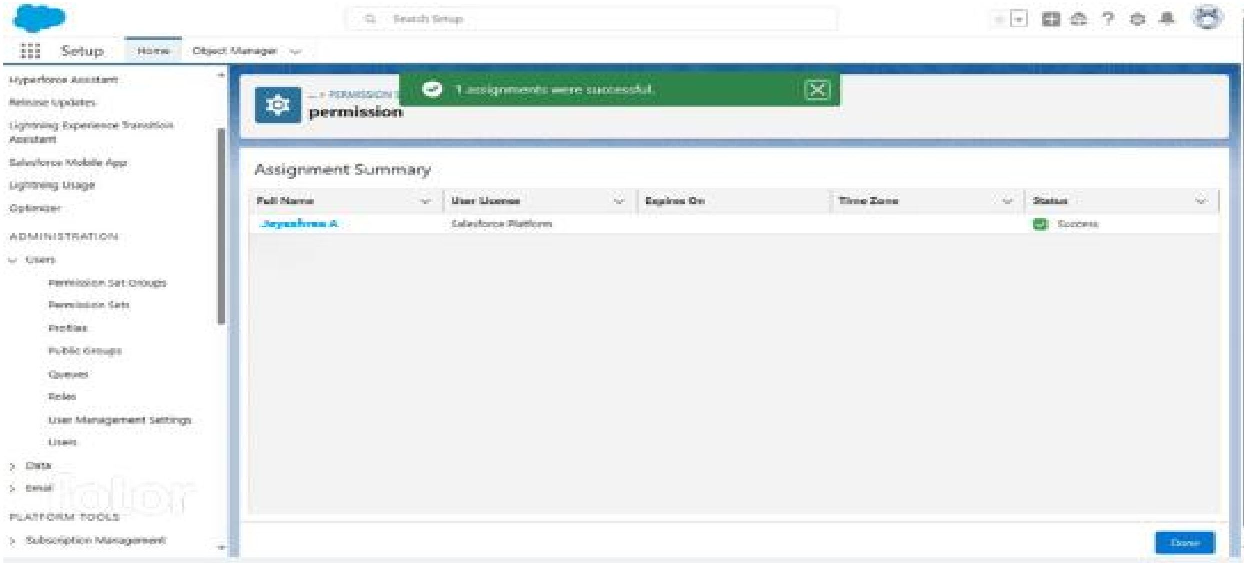
Select an Expiration Option For Assigned Users
Selected Users
Full Name
Role
Profile
Active
User License
Expires On
Jayashree A
Manager
Cancel
Back
Assign


Setup
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Hyperforce Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Permission Set Groups
Permission Sets
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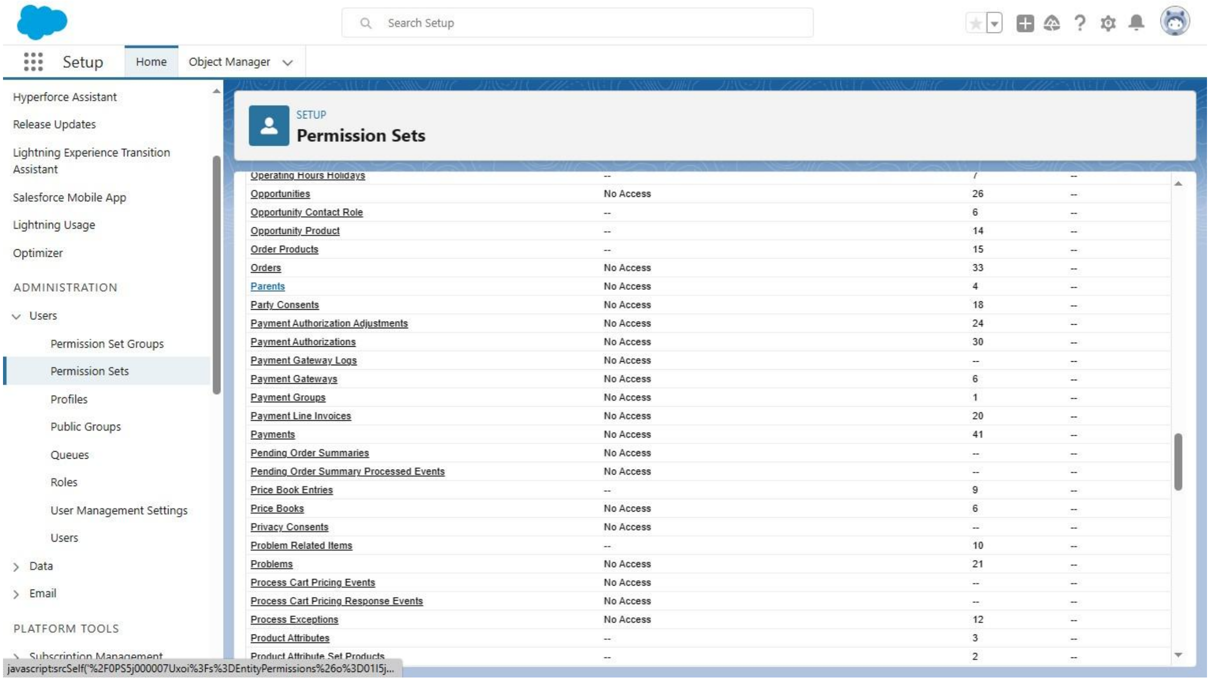
Email
PLATFORM TOOLS
Subscription Management
permission
1 assignments were successful.
Assignment Summary
Full Name
User License
Expires On
Time Zone
Status
Salesforce Platform
Success
Done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Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Permission Set Groups
Permission Sets
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User Management Settings
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PLATFORM TOOLS
Subscription Management
SETUP
Permission Sets
Operating Hours Holidays -- 7 --
Opportunities No Access 26 --
Opportunity Contact Role -- 6 --
Opportunity Product -- 14 --
Order Products -- 15 --
Orders No Access 33 --
Parents No Access 4 --
Party Consents No Access 18 --
Payment Authorization Adjustments No Access 24 --
Payment Authorizations No Access 30 --
Payment Gateway Logs No Access -- --
Payment Gateways No Access 6 --
Payment Groups No Access 1 --
Payment Line Invoices No Access 20 --
Payments No Access 41 --
Pending Order Summaries No Access -- --
Pending Order Summary Processed Events No Access -- --
Price Book Entries -- 9 --
Price Books No Access 6 --
Privacy Consents No Access -- --
Problem Related Items -- 10 --
Problems No Access 21 --
Process Cart Pricing Events No Access -- --
Process Cart Pricing Response Events No Access -- --
Process Exceptions No Access 12 --
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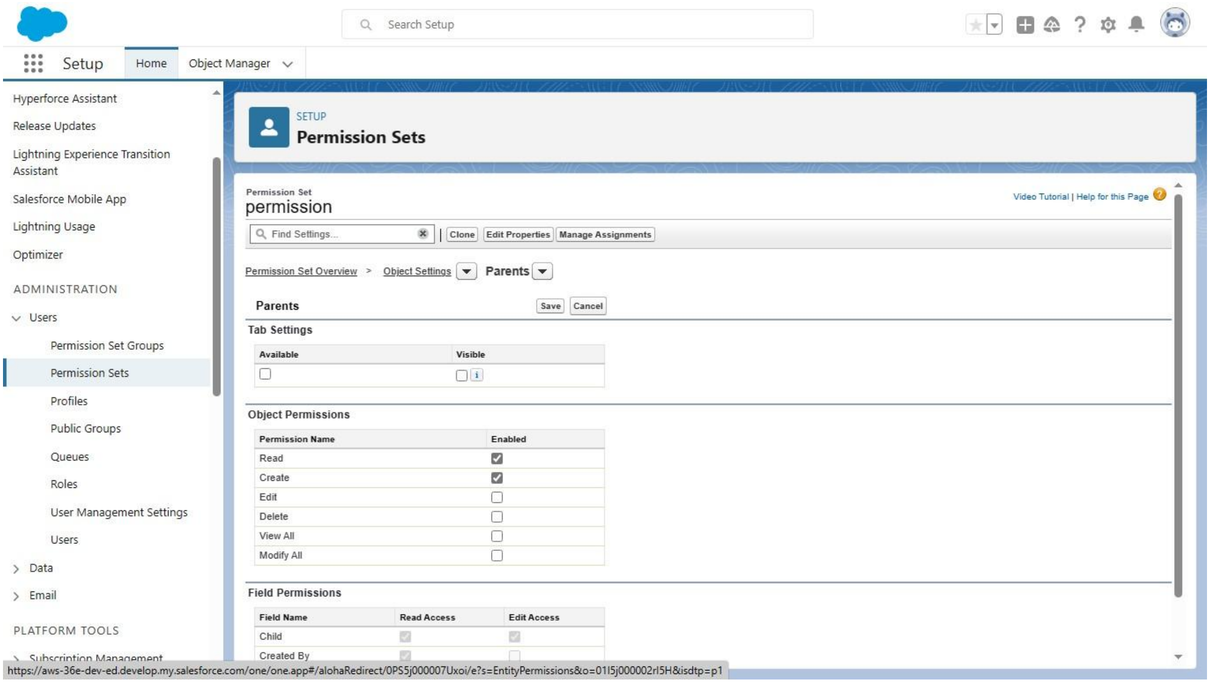
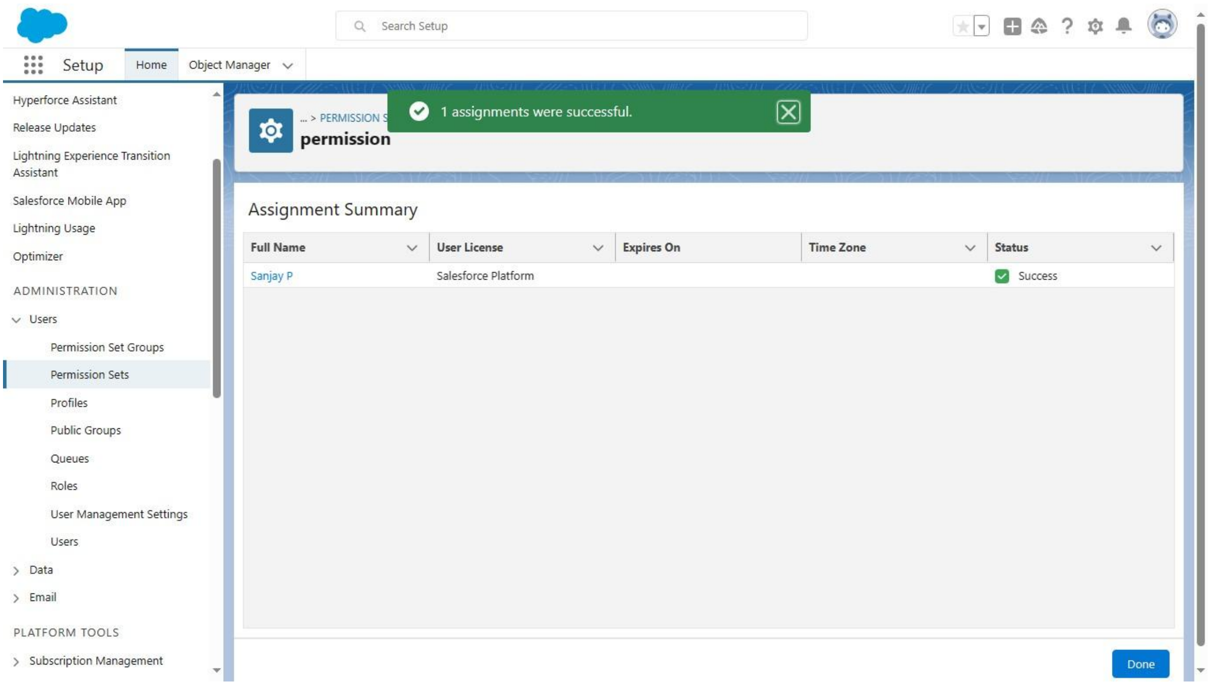




3.Suppose there are 2 Users and they are having Create, Read, Edit

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.

Step 1: Create a Permission Set for Delete Access

1. Go to "Setup" in Salesforce.

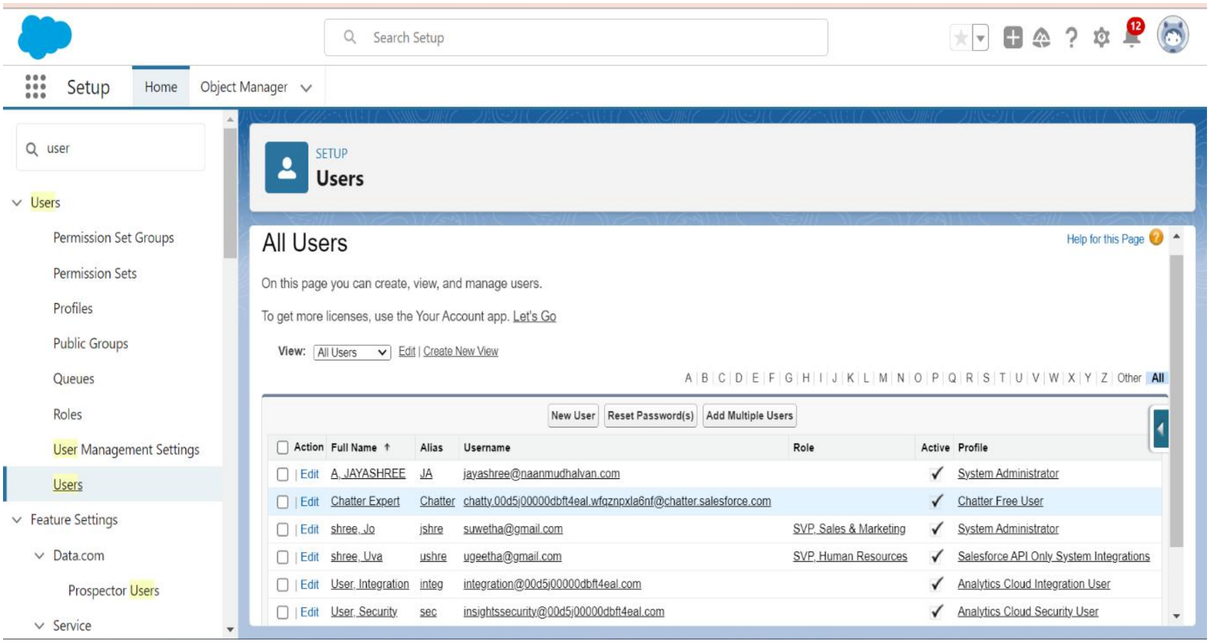
2. In the Quick Find box, type "Permission Sets" and select it.

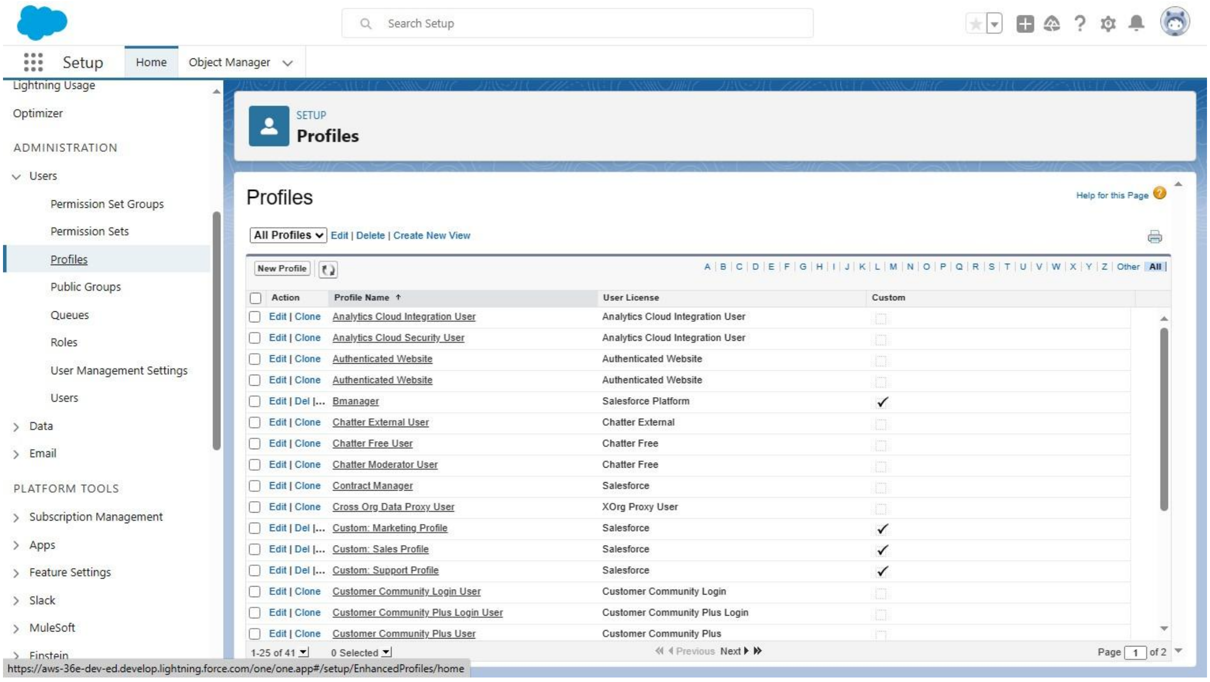
3. Click "New Permission Set" to create a new one.

4. Give the permission set a name (e.g., "Delete Access Permission Set").

5. In the "System Permissions" section, find and enable the "Delete" permission for the "Account" object.

6. Save the permission set.




Search Setup
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Optimizer
ADMINISTRATION
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Data
Email
PLATFORM TOOLS
Subscription Management
Apps
Feature Settings
Slack
MuleSoft
Einstein
SETUP
Profiles
Profiles
Help for this Page
All Profiles
Edit | Delete | Create New View
New Profile
A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All
Action
Profile Name
User License
Custom
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Edit | Clone Analytics Cloud Security User Analytics Cloud Integration User
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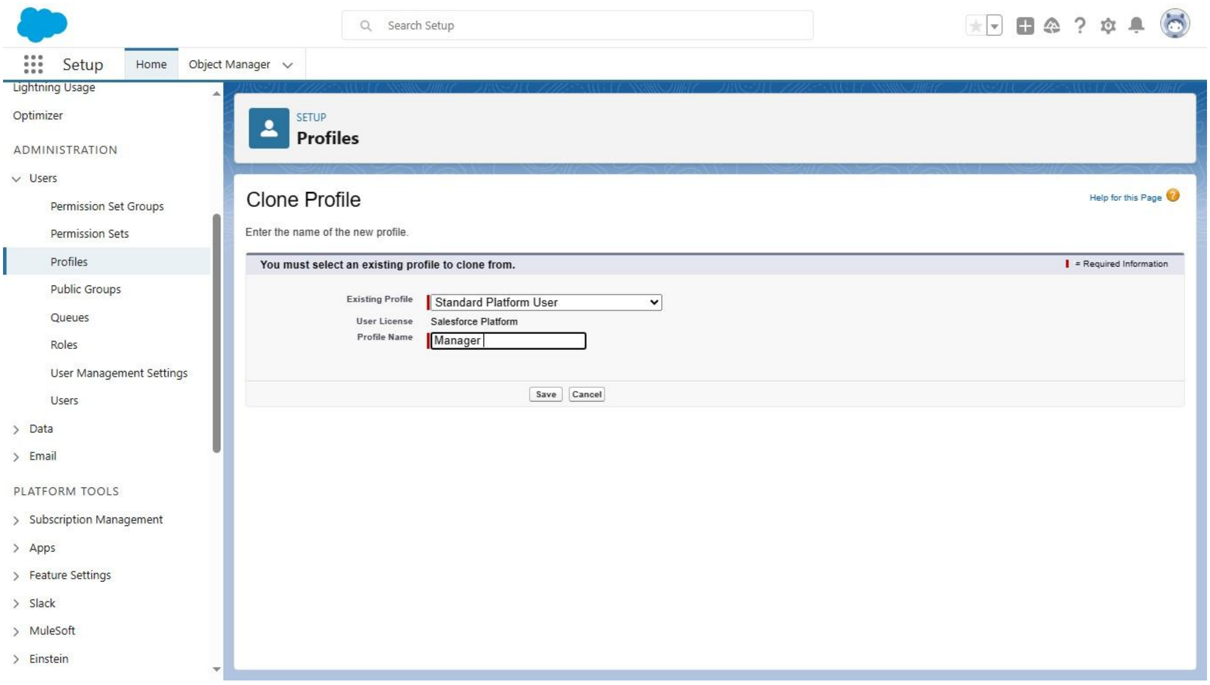
Edit | Clone Chatter External User Chatter External
Edit | Clone Chatter Free User Chatter Free
Edit | Clone Chatter Moderator User Chatter Free
Edit | Clone Contract Manager Salesforce
Edit | Clone Cross Org Data Proxy User XOrg Proxy User
Edit | Del |... Custom: Marketing Profile Salesforce ✓
Edit | Del |... Custom: Sales Profile Salesforce ✓
Edit | Del |... Custom: Support Profile Salesforce ✓
Edit | Clone Customer Community Login User Customer Community Login
Edit | Clone Customer Community Plus Login User Customer Community Plus Login
Edit | Clone Customer Community Plus User Customer Community Plus
1-25 of 41
0 Selected
Previous Next
Page 1 of 2
https://aws-36e-dev-ed.develop.lightning.force.com/one/one.app#/setup/EnhancedProfiles/home


Search Setup
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Optimizer
ADMINISTRATION
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Profiles
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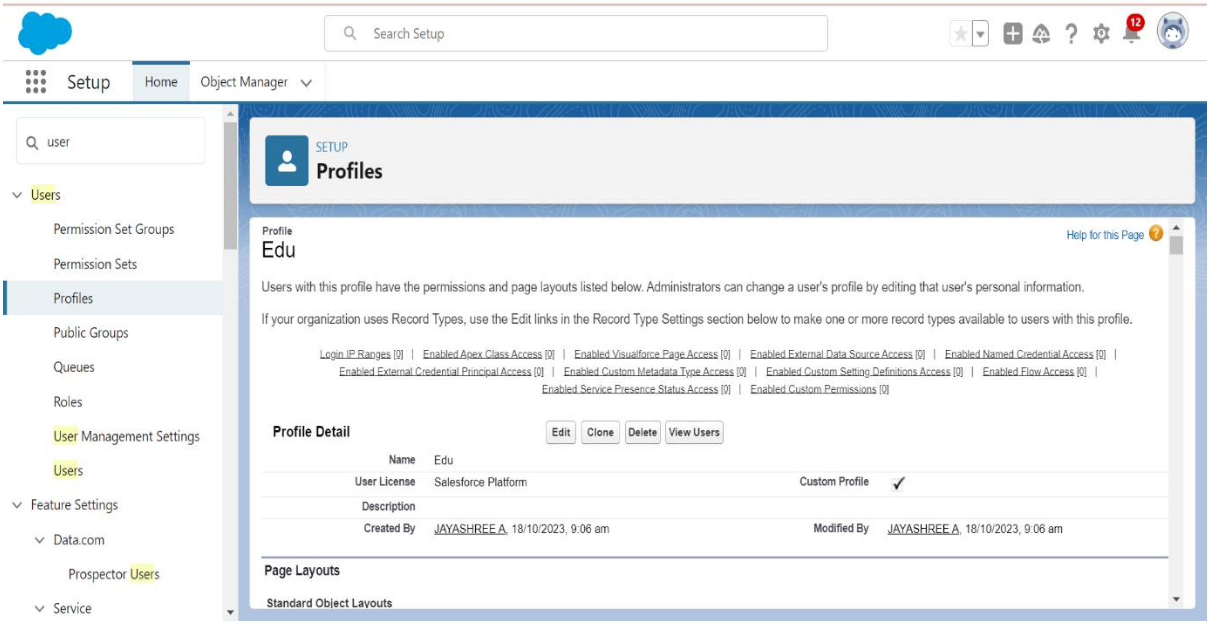
Email
PLATFORM TOOLS
Subscription Management
Apps
Feature Settings
Slack
MuleSoft
Einstein
SETUP
Profiles
Clone Profile
Help for this Page
Enter the name of the new profile.
You must select an existing profile to clone from.
= Required Information
Existing Profile Standard Platform User
User License Salesforce Platform
Profile Name Manager
Save
Cancel


Search Setup
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Permission Sets
Profiles
Public Groups
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User Management Settings
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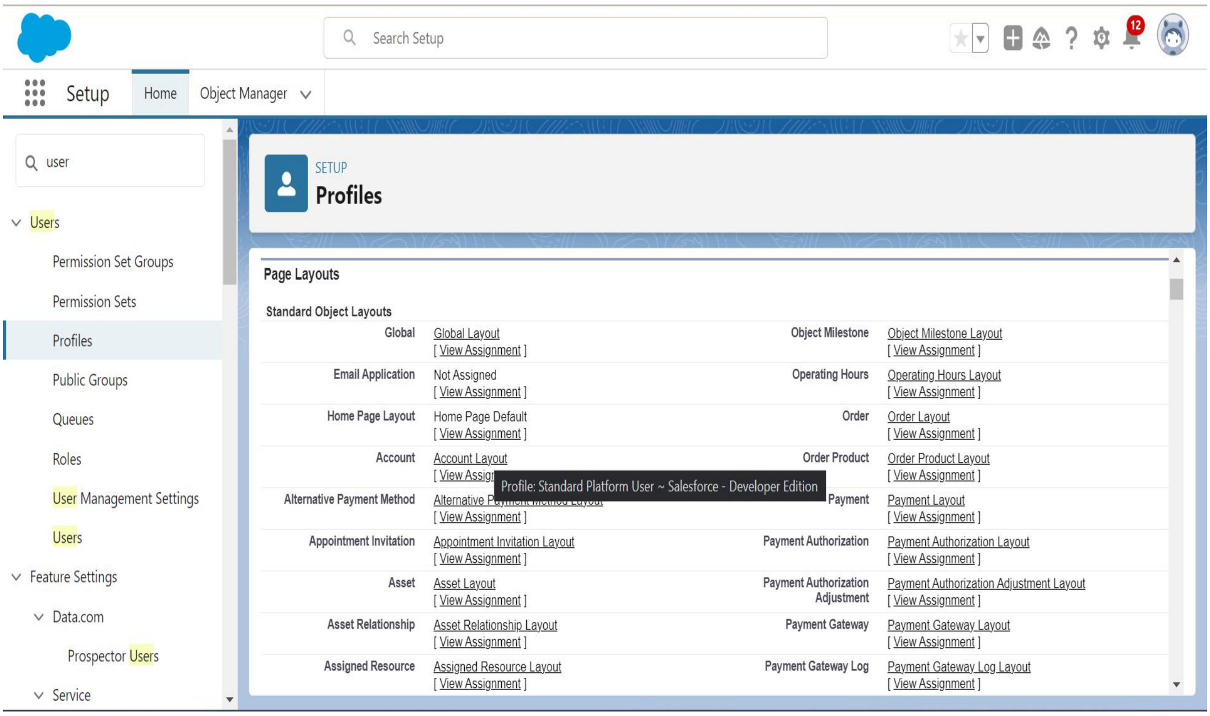
Feature Settings
Data.com
Prospector Users
Service
SETUP
Profiles
Profile
Edu
Help for this Page
Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.
If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.
Login IP Ranges [0] | Enabled Apex Class Access [0] | Enabled Visualforce Page Access [0] | Enabled External Data Source Access [0] | Enabled Named Credential Access [0] |
Enabled External Credential Principal Access [0] | Enabled Custom Metadata Type Access [0] | Enabled Custom Setting Definitions Access [0] | Enabled Flow Access [0] |
Enabled Service Presence Status Access [0] | Enabled Custom Permissions [0]
Profile Detail
Edit
Clone
Delete
View Users
Name Edu
User License Salesforce Platform
Custom Profile ✓
Description
Created By JAYASHREE A, 18/10/2023, 9:06 am
Modified By JAYASHREE A, 18/10/2023, 9:06 am
Page Layouts
Standard Object Layouts


Search Setup
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User Management Settings
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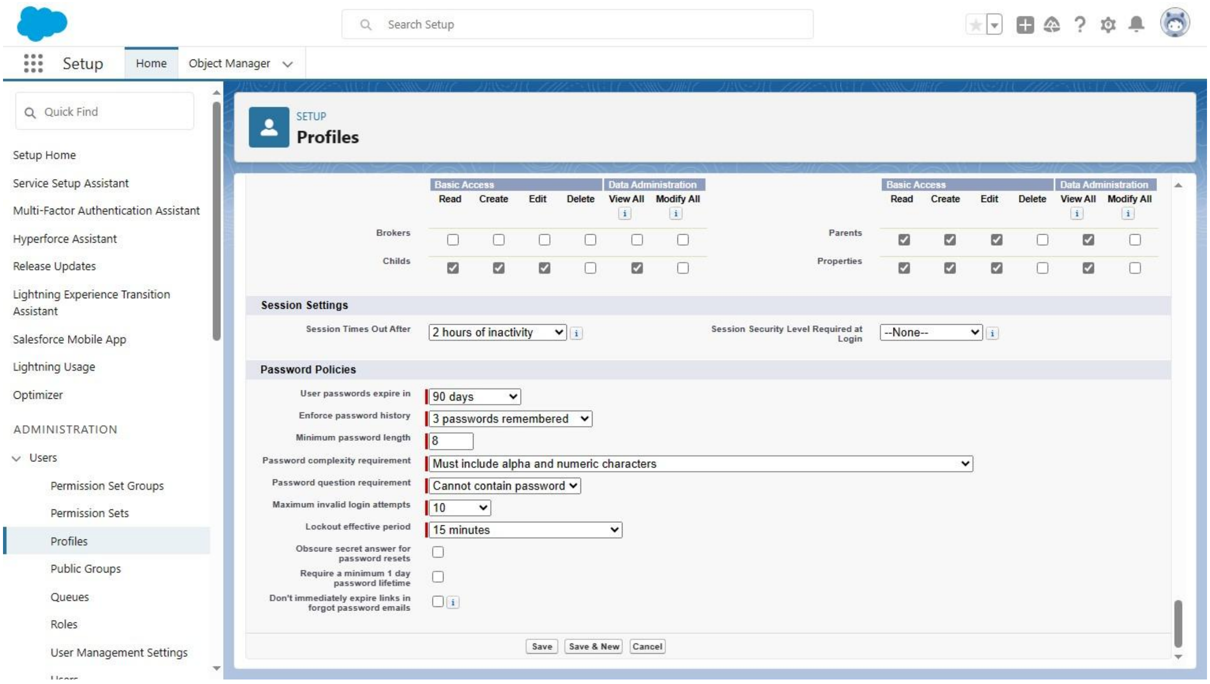
Feature Settings
Data.com
Prospector Users
Service
SETUP
Profiles
Page Layouts
Standard Object Layouts
Global Global Layout [View Assignment]
Object Milestone Object Milestone Layout [View Assignment]
Email Application Not Assigned [View Assignment]
Operating Hours Operating Hours Layout [View Assignment]
Home Page Layout Home Page Default [View Assignment]
Order Order Layout [View Assignment]
Account Account Layout
Order Product Order Product Layout [View Assignment]
Profile: Standard Platform User ~ Salesforce - Developer Edition
Alternative Payment Method
Payment Payment Layout [View Assignment]
Appointment Invitation Appointment Invitation Layout [View Assignment]
Payment Authorization Payment Authorization Layout [View Assignment]
Asset Asset Layout [View Assignment]
Payment Authorization Adjustment Payment Authorization Adjustment Layout [View Assignment]
Asset Relationship Asset Relationship Layout [View Assignment]
Payment Gateway Payment Gateway Layout [View Assignment]
Assigned Resource Assigned Resource Layout [View Assignment]
Payment Gateway Log Payment Gateway Log Layout [View Assignment]


Search Setup
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Setup Home
Service Setup Assistant
Multi-Factor Authentication Assistant
Hyperforce Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
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Roles
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SETUP
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Basic Access
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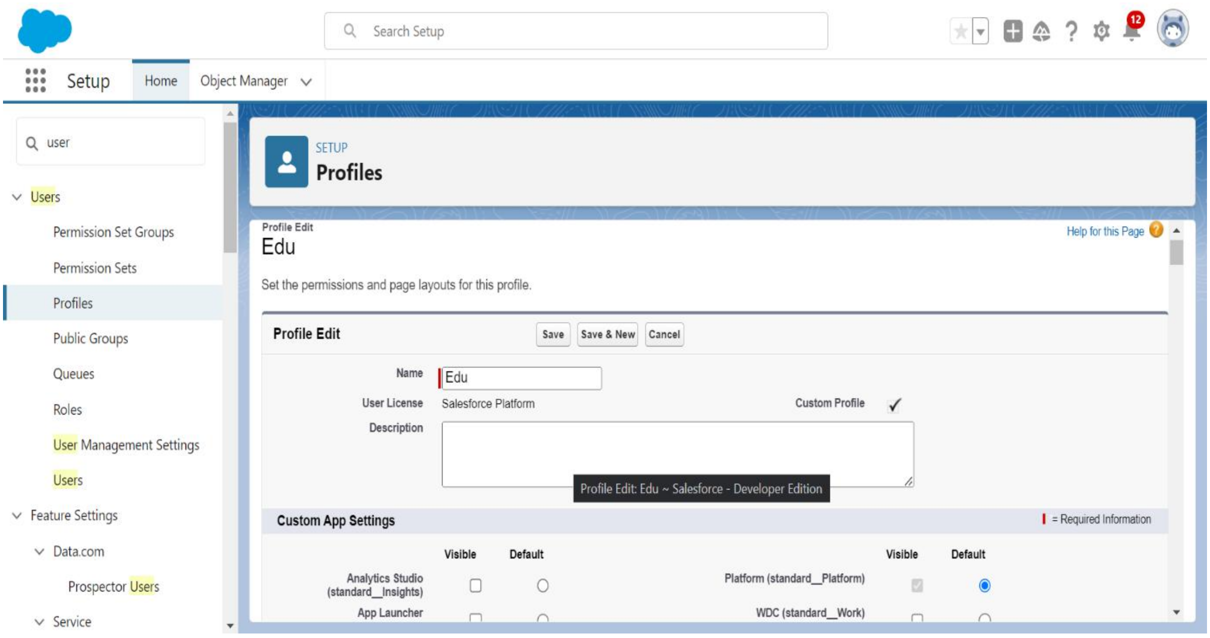
Read
Create
Edit
Delete
View All
Modify All
Brokers
Childs
Parents
Properties
Session Settings
Session Times Out After
2 hours of inactivity
Session Security Level Required at Login
--None--
Password Policies
User passwords expire in
90 days
Enforce password history
3 passwords remembered
Minimum password 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
Obscure secret answer for password resets
Require a minimum 1 day password lifetime
Don't immediately expire links in forgot password emails
Save
Save & New
Cancel


Search Setup
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User Management Settings
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Feature Settings
Data.com
Prospector Users
Service
SETUP
Profiles
Profile Edit
Edu
Help for this Page
Set the permissions and page layouts for this profile.
Profile Edit
Save
Save & New
Cancel
Name
Edu
User License
Salesforce Platform
Custom Profile
Description
Profile Edit: Edu ~ Salesforce - Developer Edition
Custom App Settings
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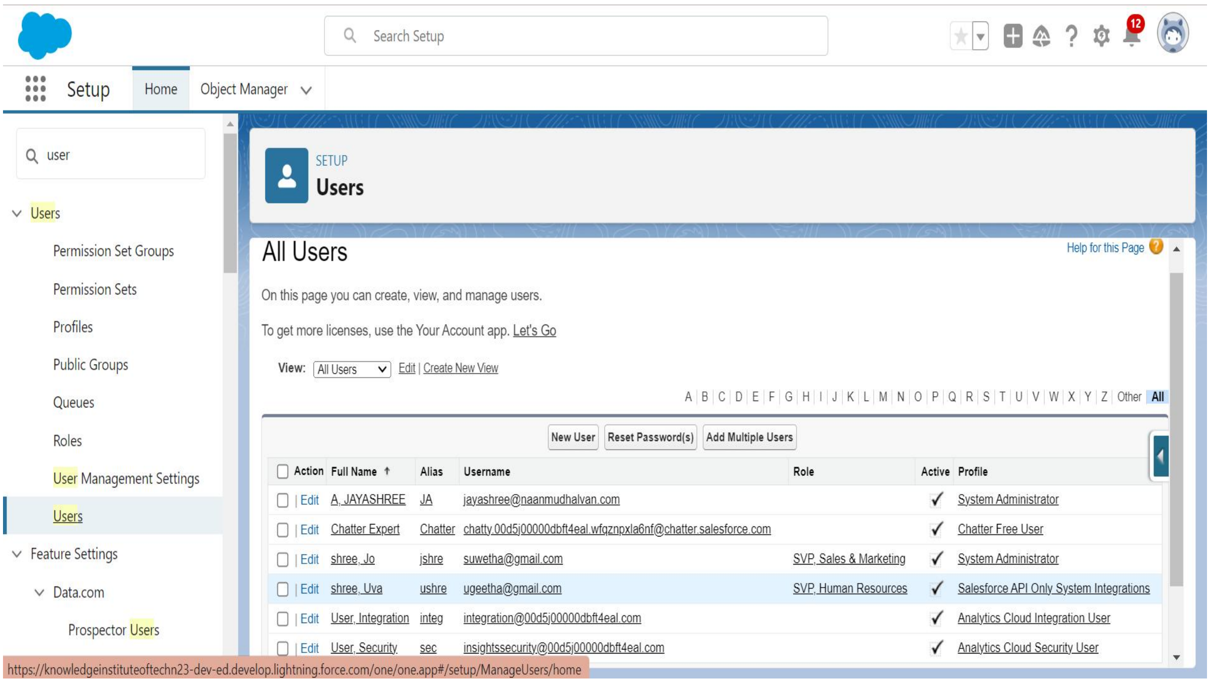
Default
Analytics Studio (standard__Insights)
App Launcher
Platform (standard__Platform)
WDC (standard__Work)


Search Setup
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Permission Sets
Profiles
Public Groups
Queues
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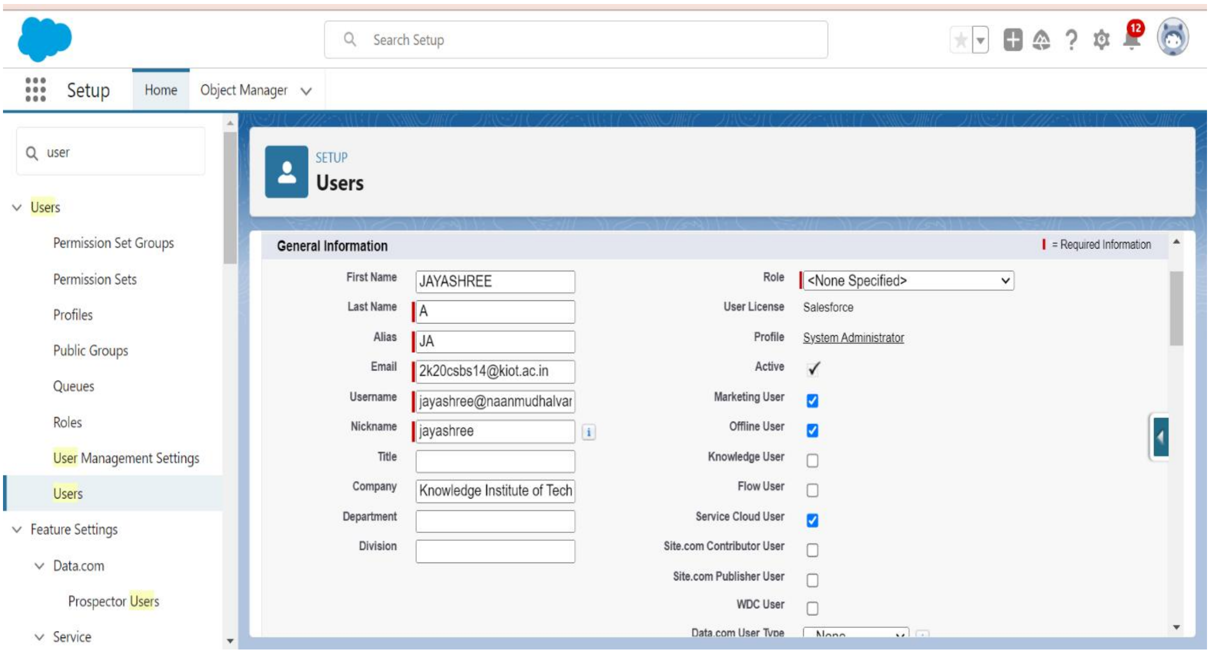
User Management Settings
Users
Feature Settings
Data.com
Prospector Users
SETUP
Users
All Users
Help for this Page
On this page you can create, view, and manage users.
To get more licenses, use the Your Account app. Let's Go
View: All Users Edit | Create New View
A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All
New User
Reset Password(s)
Add Multiple Users
Action Full Name Alias Username Role Active Profile
Edit A, JAYASHREE JA jayashree@naanmudhalvan.com System Administrator
Edit Chatter Expert Chatter chatty.00d5j00000dbft4eal.wfqznpxla6nf@chatter.salesforce.com Chatter Free User
Edit shree, Jo jshre suwetha@gmail.com SVP, Sales & Marketing System Administrator
Edit shree, Uva ushre ugeetha@gmail.com SVP, Human Resources Salesforce API Only System Integrations
Edit User, Integration integ integration@00d5j00000dbft4eal.com Analytics Cloud Integration User
Edit User, Security sec insightssecurity@00d5j00000dbft4eal.com Analytics Cloud Security User
https://knowledgeinstituteoftechn23-dev-ed.develop.lightning.force.com/one/one.app#/setup/ManageUsers/home


Search Setup
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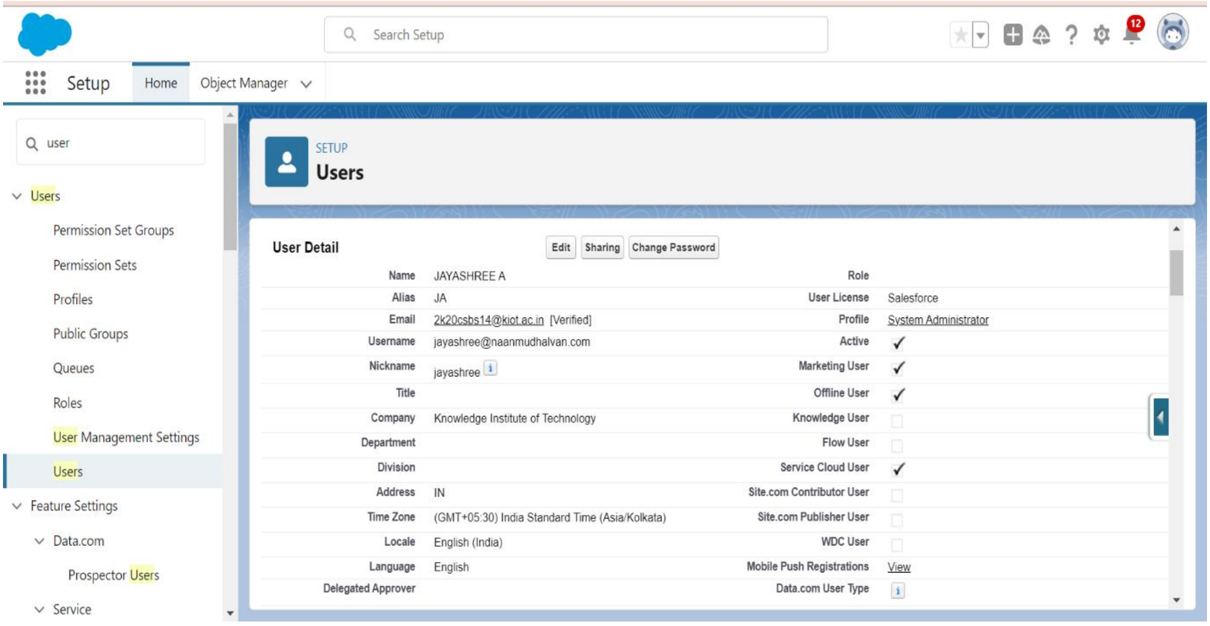
Data.com
Prospector Users
Service
SETUP
Users
General Information
= Required Information
First Name JAYASHREE
Last Name A
Alias JA
Email 2k20csbs14@kiot.ac.in
Username jayashree@naanmudhalvar
Nickname jayashree
Title
Company Knowledge Institute of Tech
Department
Division
Role <None Specified>
User License Salesforce
Profile System Administrator
Active
Marketing User
Offline User
Knowledge User
Flow User
Service Cloud User
Site.com Contributor User
Site.com Publisher User
WDC User


Search Setup
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Public Groups
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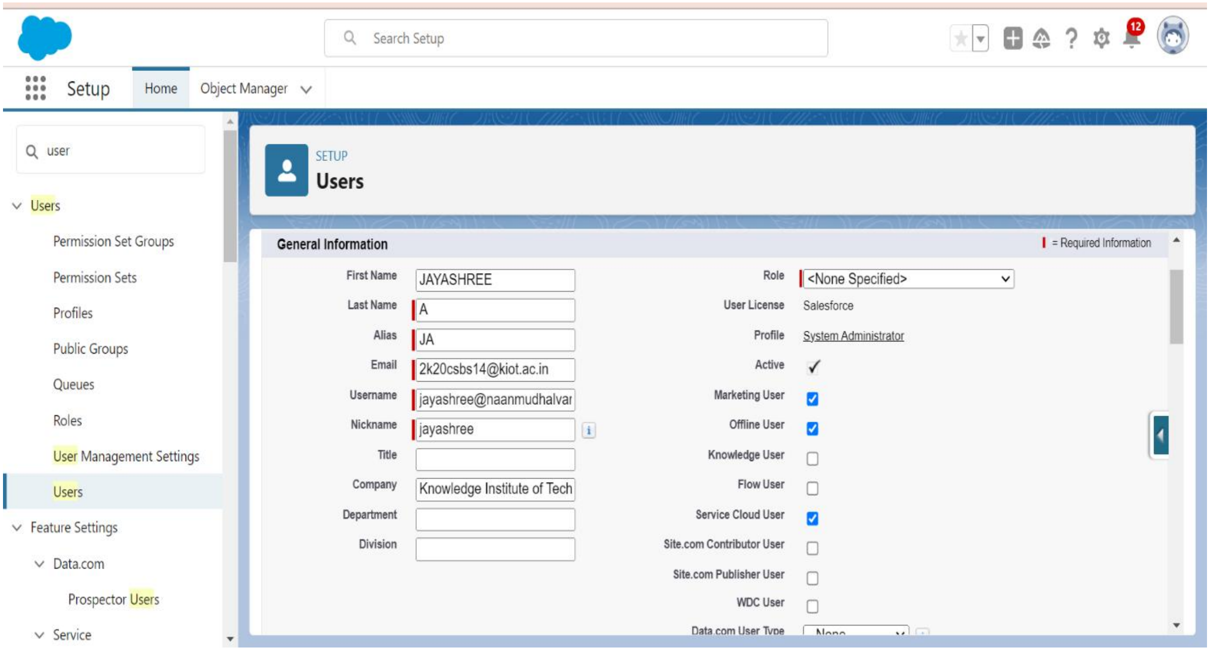
User Management Settings
Users
Feature Settings
Data.com
Prospector Users
Service
SETUP
Users
User Detail
Edit
Sharing
Change Password
Name JAYASHREE A
Alias JA
Email 2k20csbs14@kiot.ac.in [Verified]
Username jayashree@naanmudhalvan.com
Nickname jayashree
Title
Company Knowledge Institute of Technology
Department
Division
Address IN
Time Zone (GMT+05:30) India Standard Time (Asia/Kolkata)
Locale English (India)
Language English
Delegated Approver
Role
User License Salesforce
Profile System Administrator
Active
Marketing User
Offline User
Knowledge User
Flow User
Service Cloud User
Site.com Contributor User
Site.com Publisher User
WDC User
Mobile Push Registrations View
Data.com User Type


Search Setup
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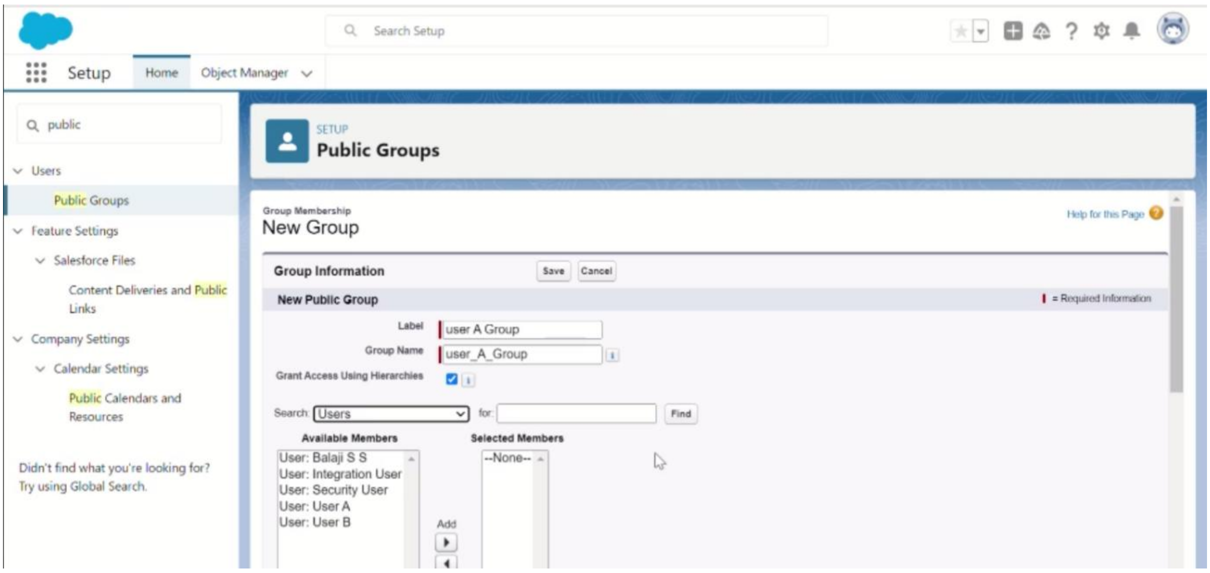
Data.com
Prospector Users
Service
SETUP
Users
General Information
= Required Information
First Name JAYASHREE
Last Name A
Alias JA
Email 2k20csbs14@kiot.ac.in
Username jayashree@naanmudhalvar
Nickname jayashree
Title
Company Knowledge Institute of Tech
Department
Division
Role <None Specified>
User License Salesforce
Profile System Administrator
Active
Marketing User
Offline User
Knowledge User
Flow User
Service Cloud User
Site.com Contributor User
Site.com Publisher User
WDC User
Data.com User Type

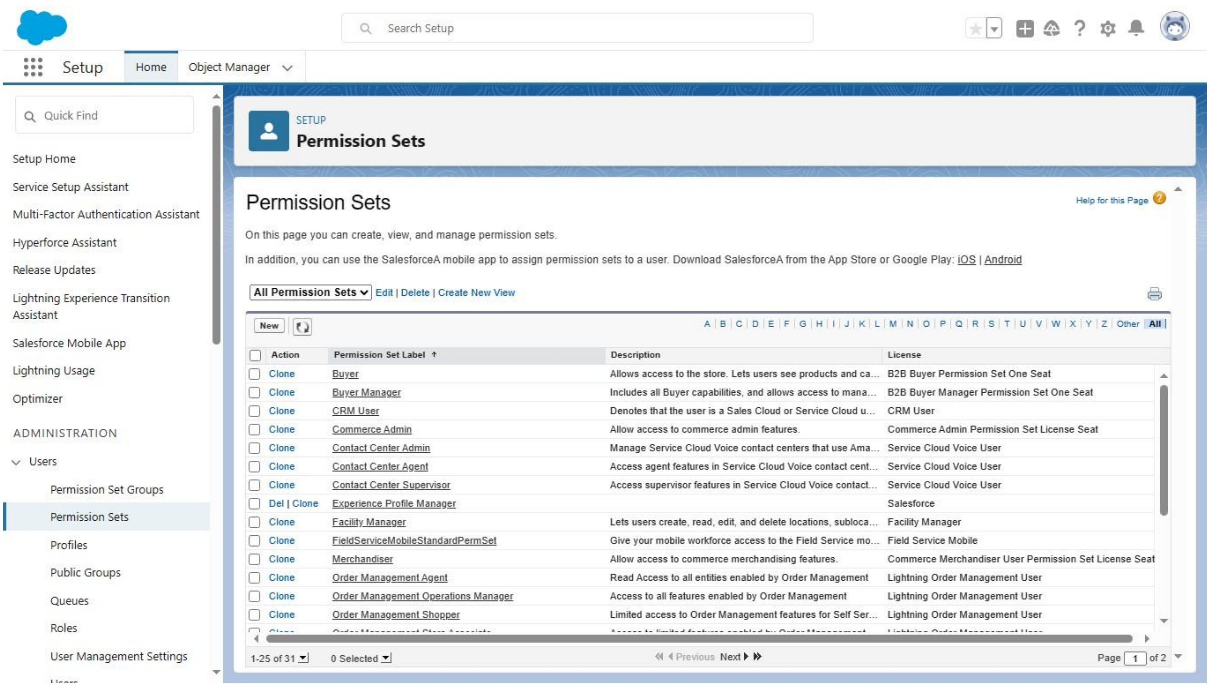


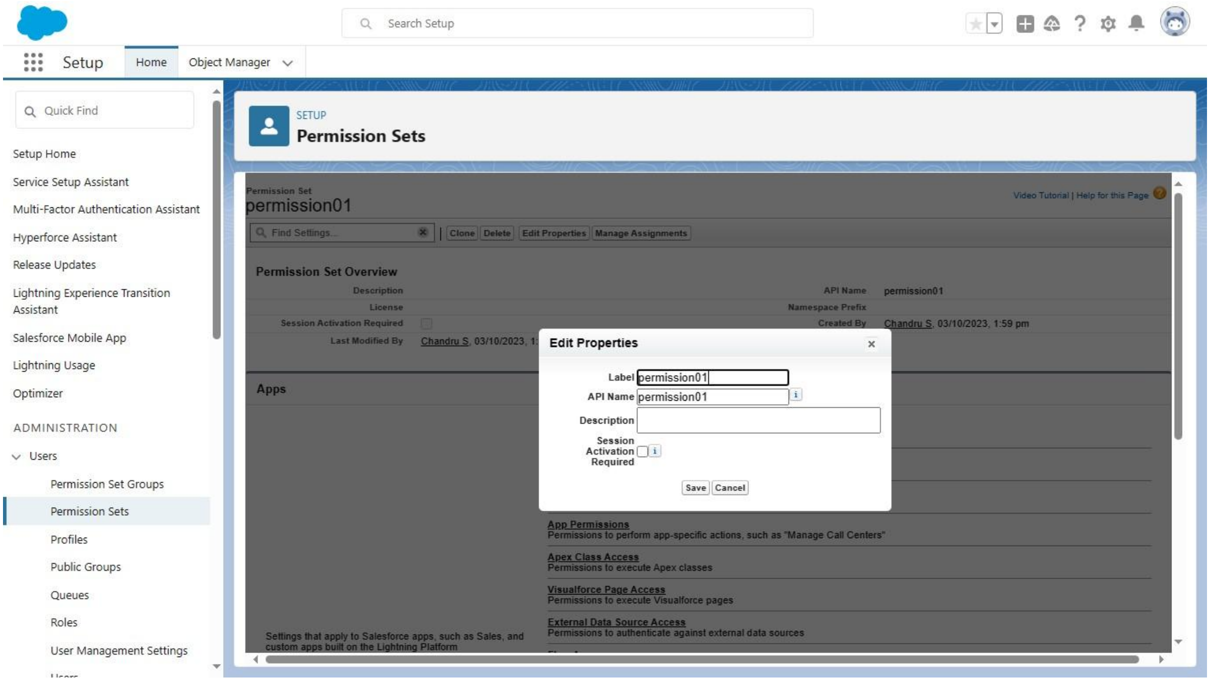
Step 2: Assign the Permission Set to the User Needing Delete Access

1. In the "Permission Set Detail" page, click on "Manage Assignments."

2. Click "Add Assignments" and select the user who needs delete access.

3. Save the assignment.




Search Setup
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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
Users
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User Management Settings
SETUP
Permission Sets
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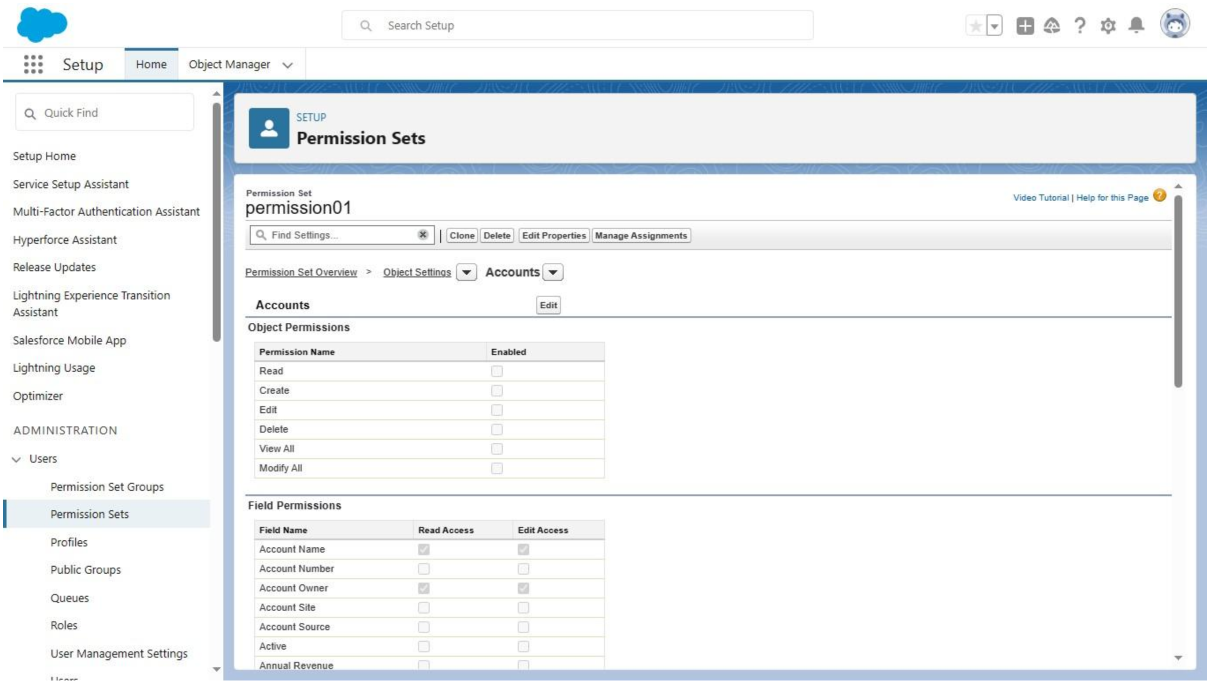
permission01
Video Tutorial | Help for this Page
Find Settings...
Clone
Delete
Edit Properties
Manage Assignments
Permission Set Overview
Description
License
Session Activation Required
Last Modified By
Chandru S, 03/10/2023, 1
API Name
permission01
Namespace Prefix
Created By
Chandru S, 03/10/2023, 1:59 pm
Edit Properties
Label
permission01
API Name
permission01
Description
Session Activation Required
Save
Cancel
Apps
App Permissions
Permissions to perform app-specific actions, such as "Manage Call Centers"
Apex Class Access
Permissions to execute Apex classes
Visualforce Page Access
Permissions to execute Visualforce pages
External Data Source Access
Permissions to authenticate against external data sources
Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform


Search Setup
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Hyperforce Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
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Video Tutorial | Help for this Page
Find Settings...
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Manage Assignments
Permission Set Overview > Object Settings
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Object Permissions
Permission Name
Enabled
Read
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Account Source
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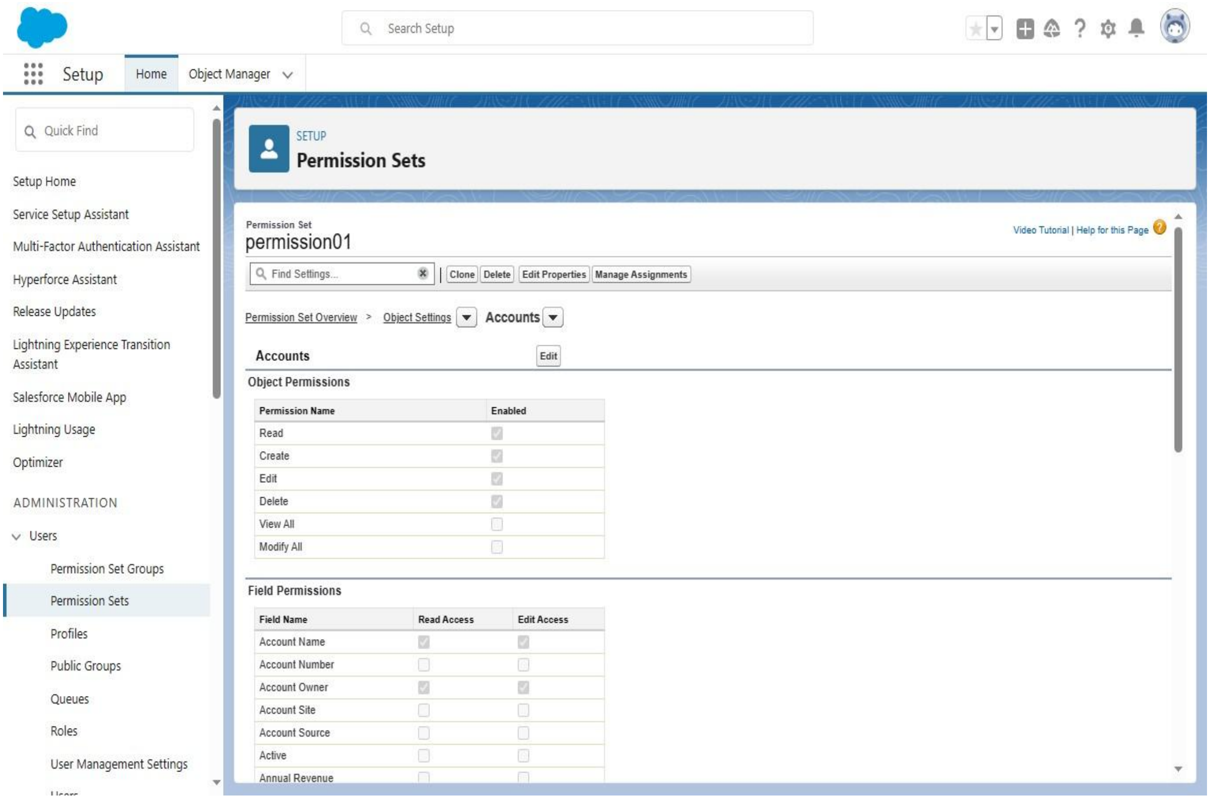
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Multi-Factor Authentication Assistant
Hyperforce Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
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SETUP
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permission01
Video Tutorial | Help for this Page
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Clone
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Edit Properties
Manage Assignments
Permission Set Overview > Object Settings
Accounts
Accounts
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Object Permissions
Permission Name
Enabled
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Account Site
Account Source
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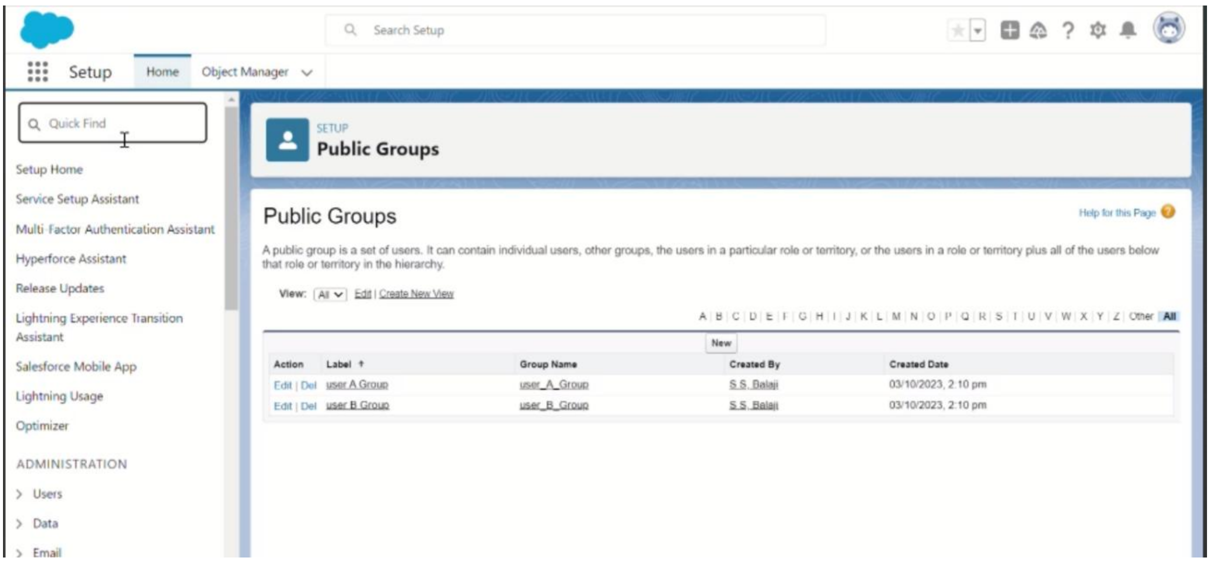
Annual Revenue


Search Setup
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Service Setup Assistant
Multi-Factor Authentication Assistant
Hyperforce Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Data
Email
SETUP
Public Groups
Public Groups
Help for this Page
A public group is a set of users. It can contain individual users, other groups, the users in a particular role or territory, or the users in a role or territory plus all of the users below that role or territory in the hierarchy.
View: All Edit | Create New View
New
Action
Label
Group Name
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Created Date
Edit | Del
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03/10/2023, 2:10 pm
Edit | Del
user B Group
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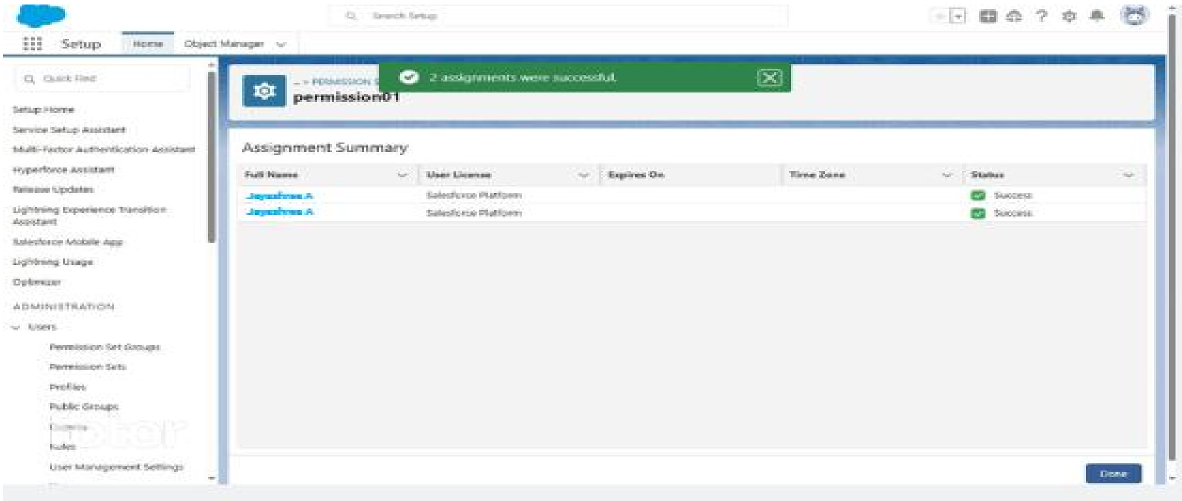
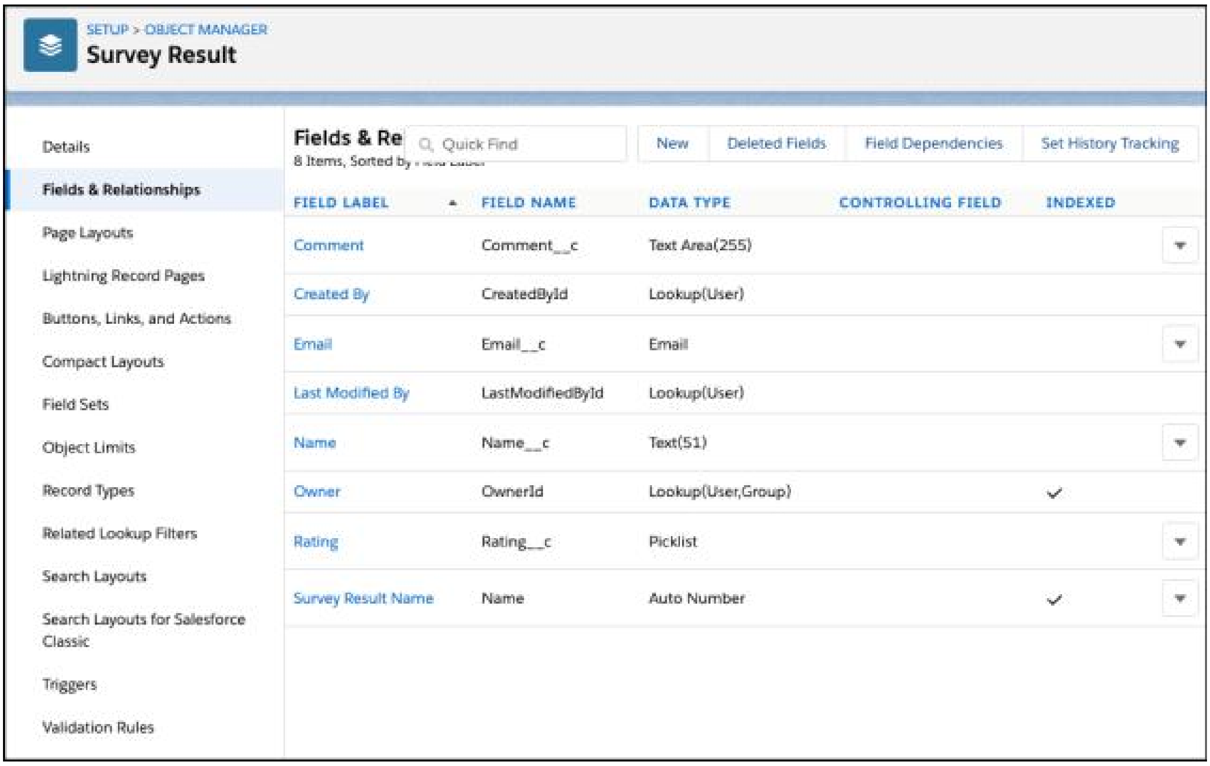
03/10/2023, 2:10 pm



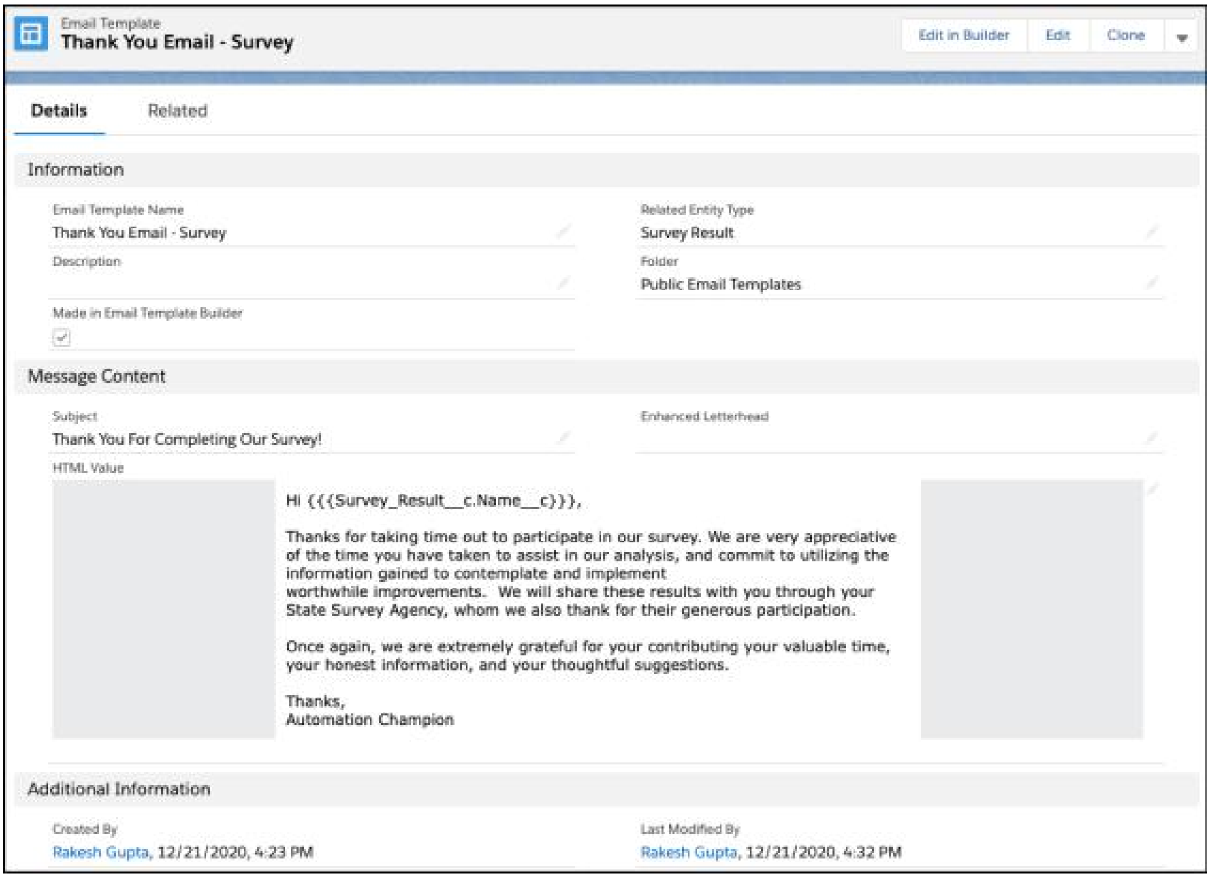
4.Create a screen flow for a basic survey to fill in the details for any form.

Step 1: Create a custom object
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.



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

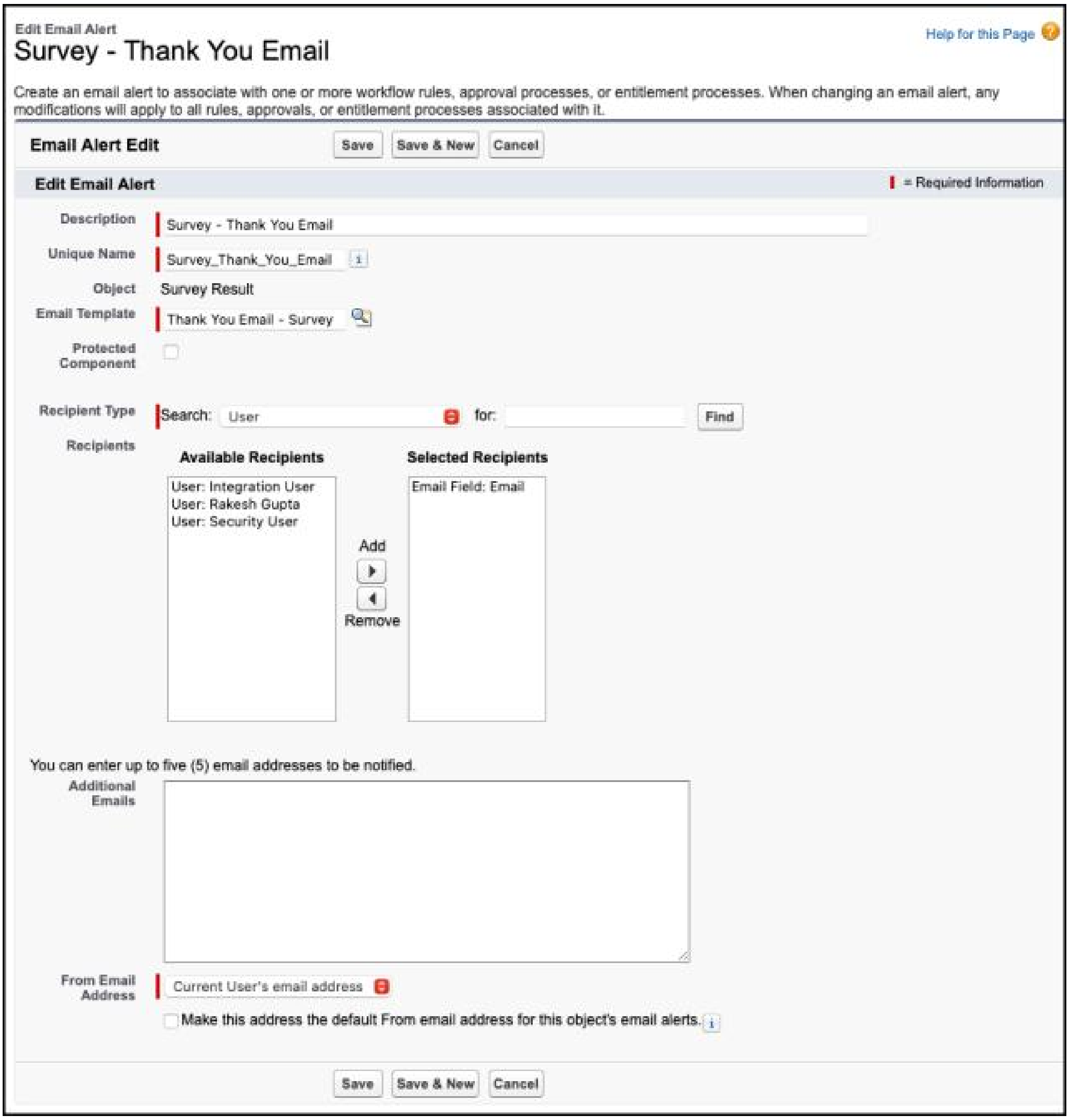
1.Click App Launcher.
2.In the Quick Find box, type Email Templates.
3.Clicks on the New Email template button.
4.Name the Lightning Email Template and make sure to store it in the Public Email Templates folder.
5.Create a template like the following screenshot



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.



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:
5.How do you want to start building: Freeform
6.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

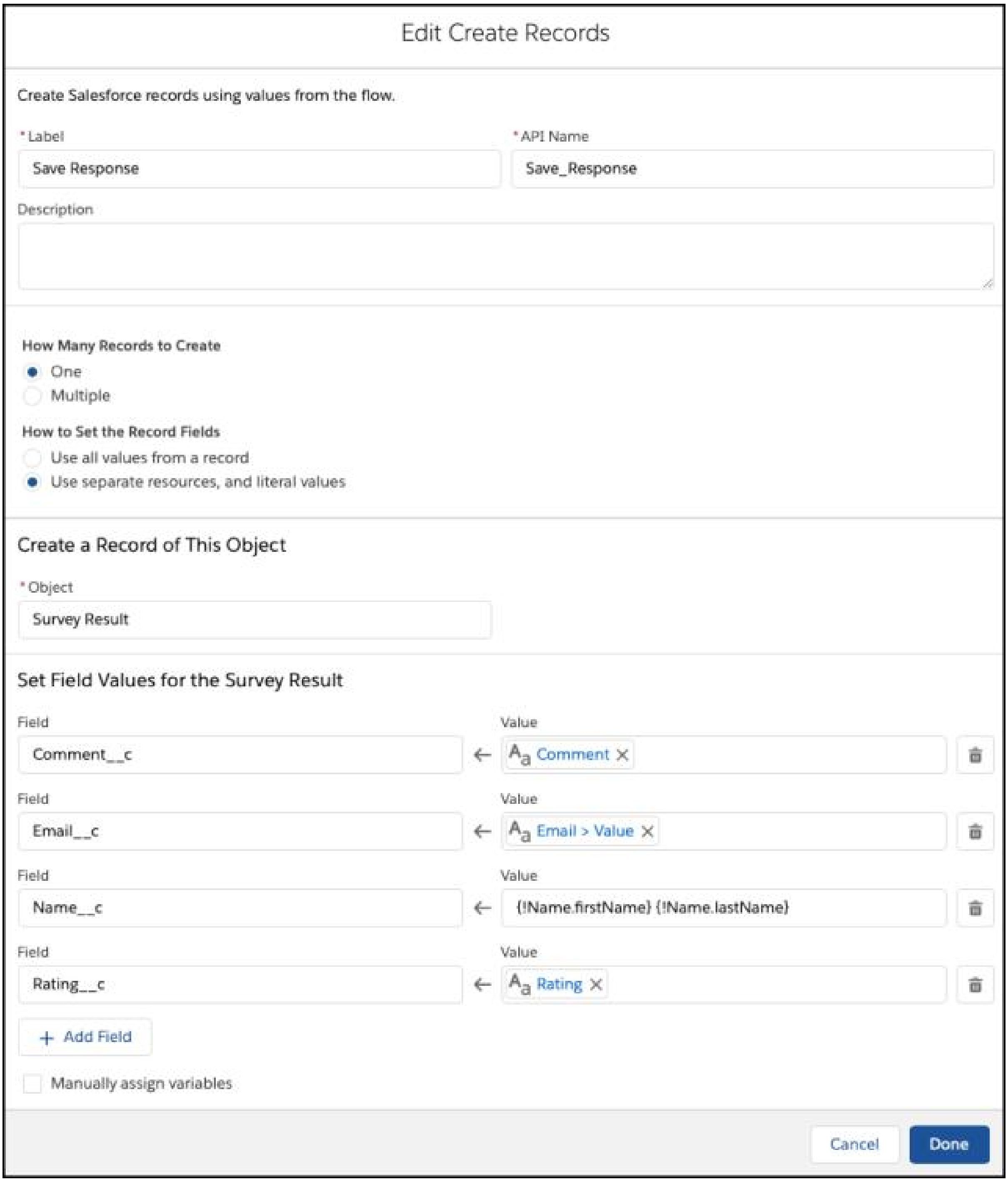
Row 1:
Field: Comment__c
Value: {!Comment}
Click Add Row

Row 2:
Field: Email__c
Value: {!Email.value}
Click Add Row

Row3:
Field: Name__c
Value: {!Name.firstName} {!Name.lastName}
Click Add Row

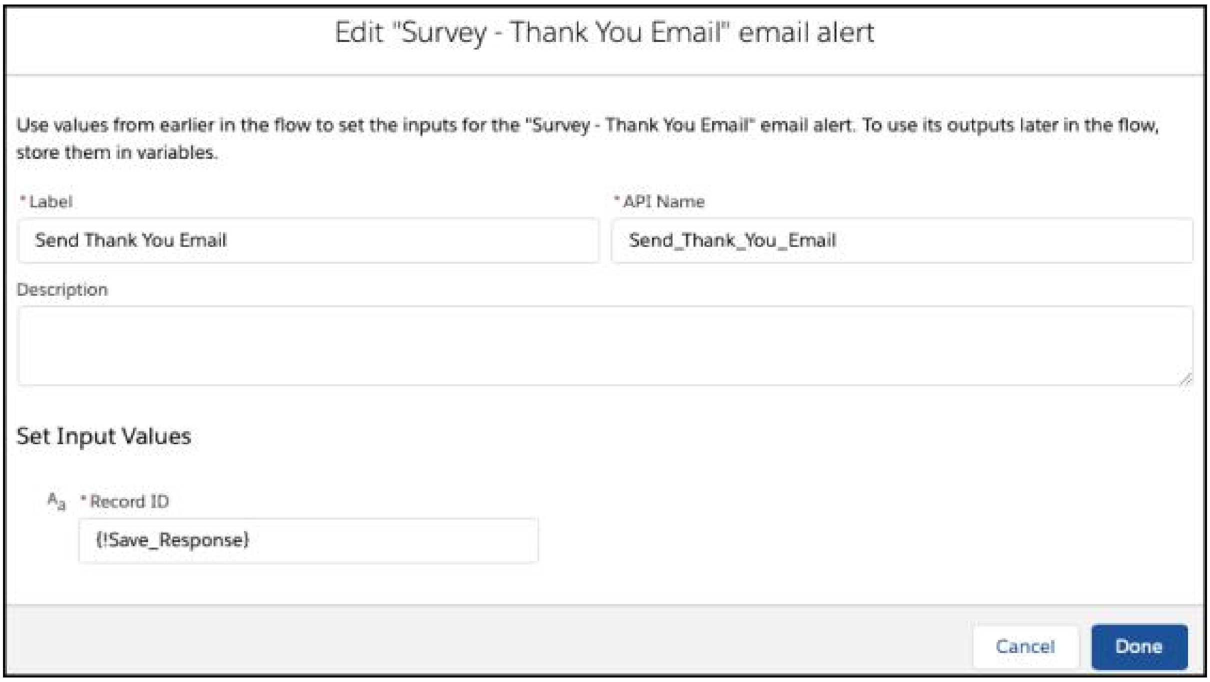
Row 3:
Field: Rating__c
Value: {!Rating}

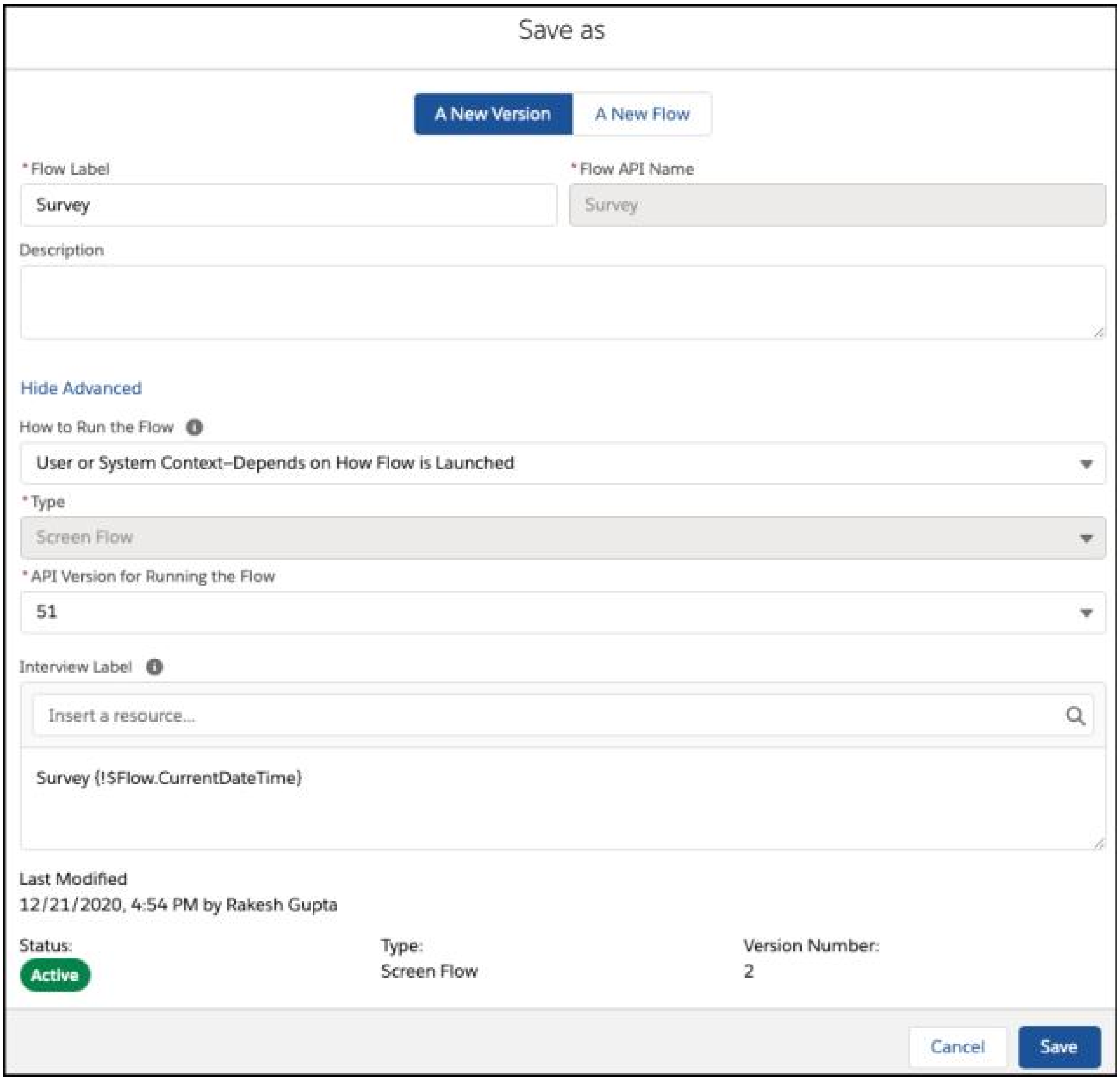
7.Click Done.



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

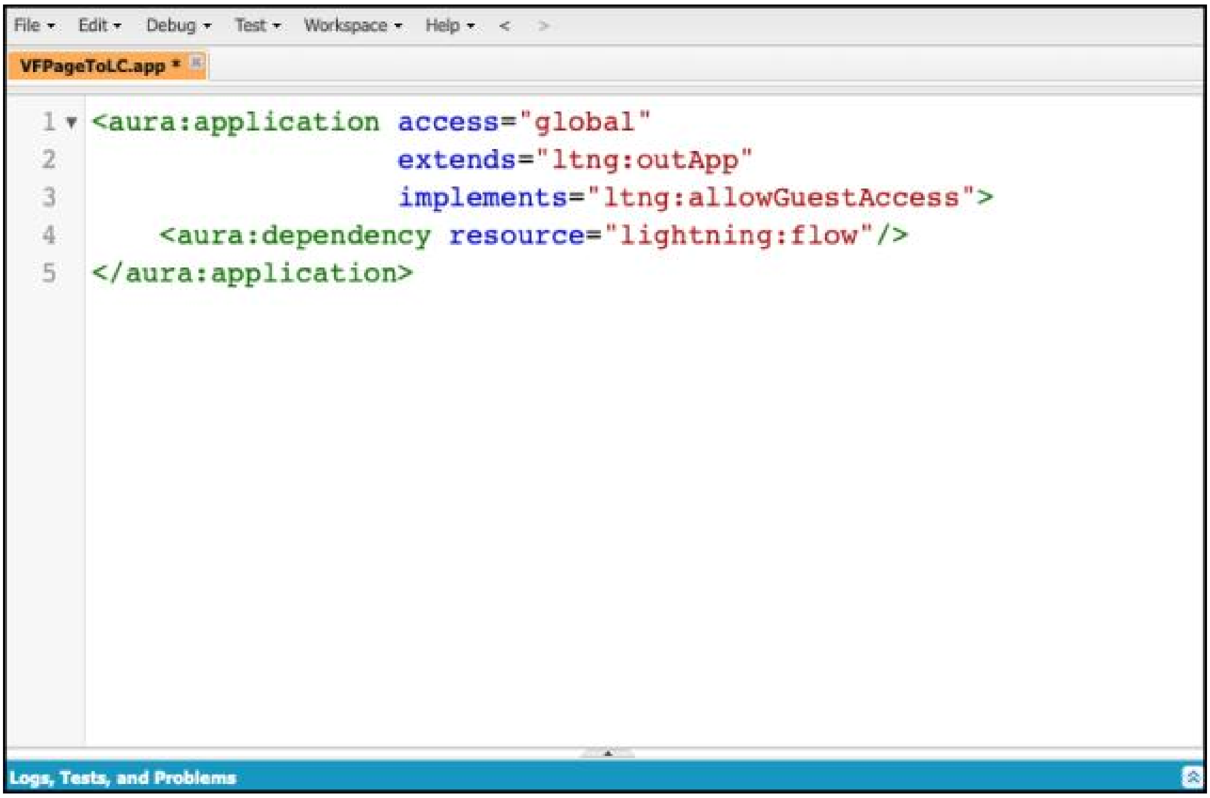
1.Under Toolbox, select Element.
2.Drag-and-drop Action element onto the Flow designer.
3.In the Action box, type Survey – Thank You Email.
4.Clicks on the Survey – Thank You Email email alert.
5.Click Done.

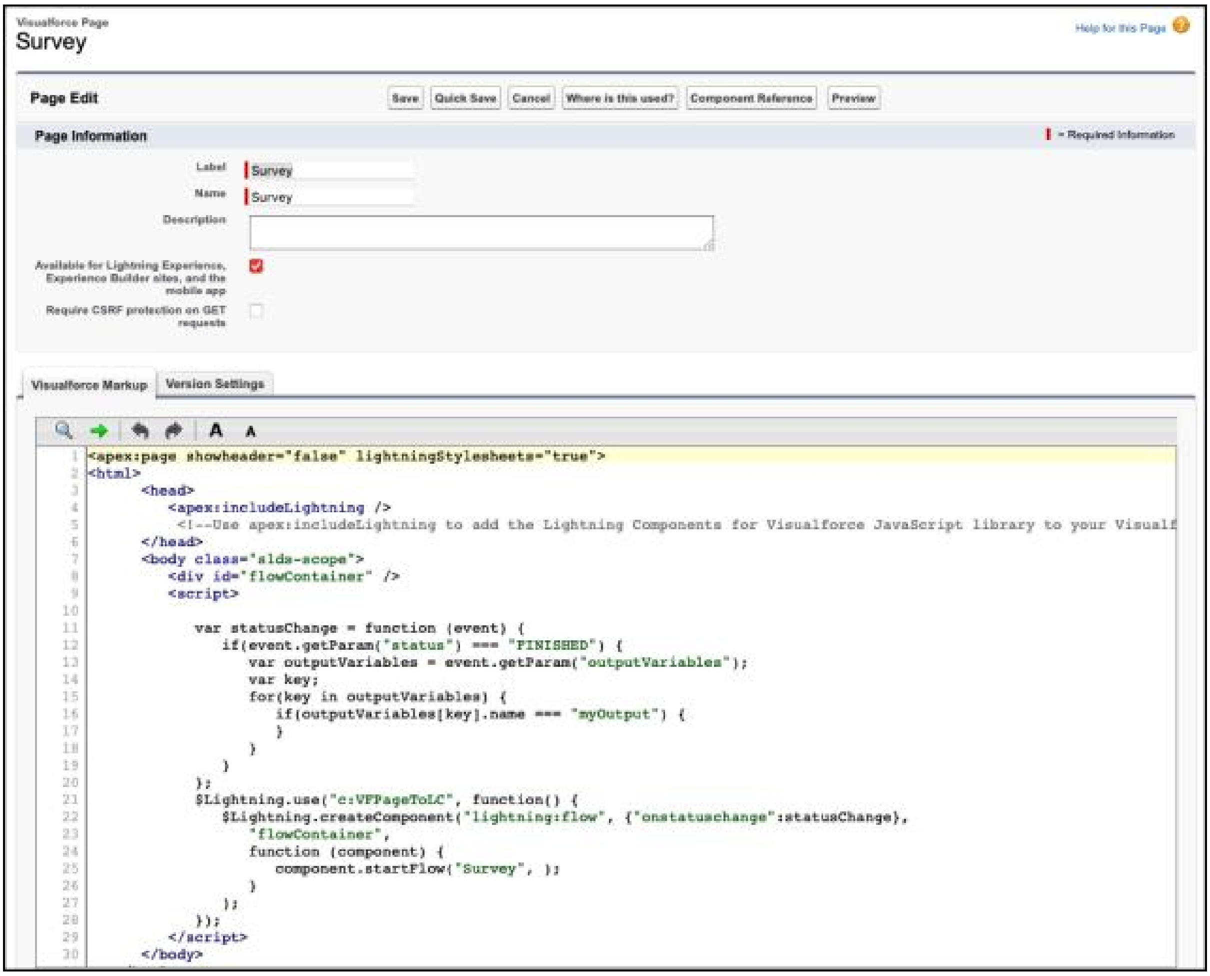

Edit "Survey - Thank You Email" email alert
Use values from earlier in the flow to set the inputs for the "Survey - Thank You Email" email alert. To use its outputs later in the flow, store them in variables.
*Label
Send Thank You Email
*API Name
Send_Thank_You_Email
Description
Set Input Values
*Record ID
{!Save_Response}
Cancel
Done



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.


File Edit Debug Test Workspace Help
VFPageToLC.app *
<aura:application access="global"
extends="ltng:outApp"
implements="ltng:allowGuestAccess">
<aura:dependency resource="lightning:flow"/>
</aura:application>
Logs, Tests, and Problems



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.

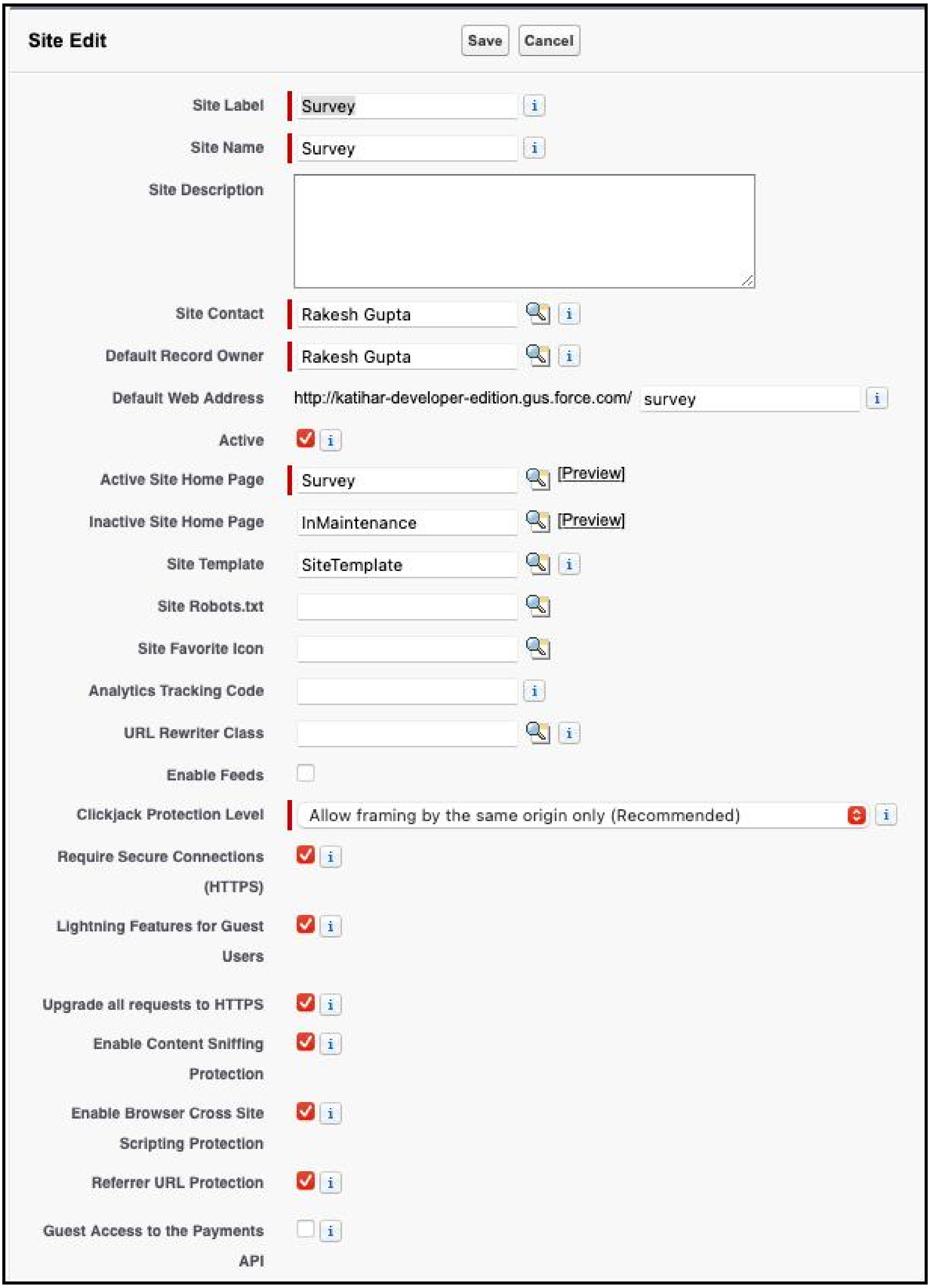
1.Click Setup.

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.



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:

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

Row 1:

Field: Comment__c

Value: {!Comment}

Click Add Row

Row 2:

Field: Email__c

Value: {!Email.value}

Click Add Row

Row 3:

Field: Name__c

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

Click Add Row

Row 3:

Field: Rating__c

Value: {!Rating}

Click Done.