

Naan Mudhalvan  
Salesforce Developer(Course)  
Assignment no 1

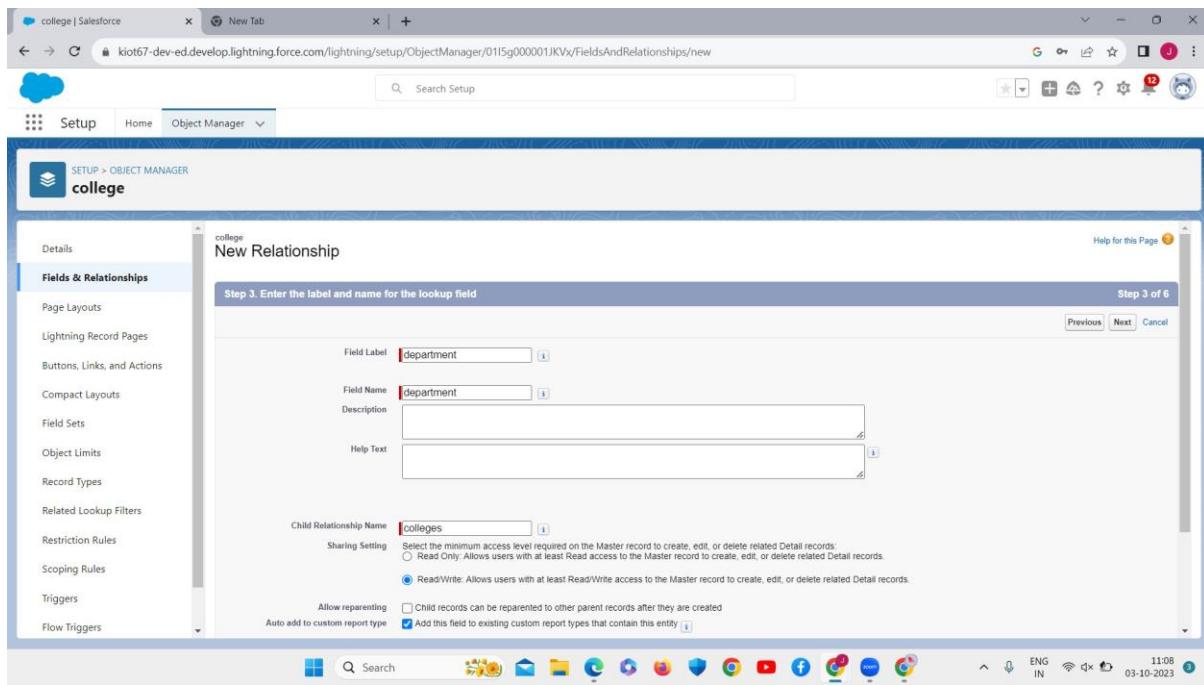
Name :Jaya dharani A  
Naan Mudhalvan id : au611220205012  
Year & Dep : 4<sup>th</sup> year & IT  
Batch : 2024  
Zone no : Zone 8

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

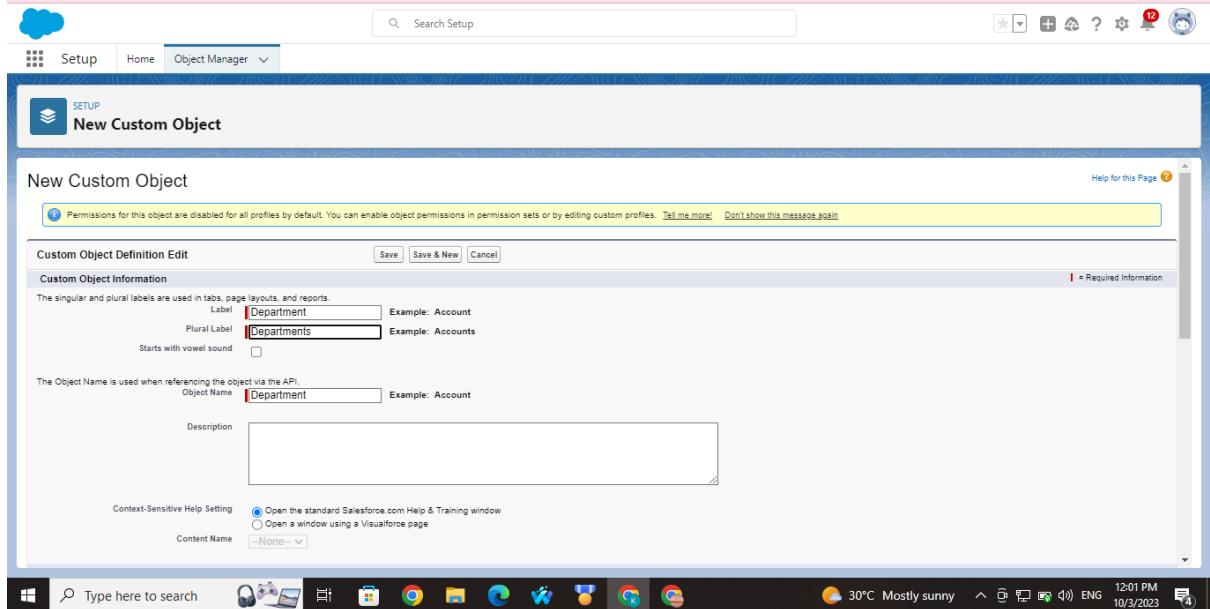
Solution:

### Step 1: Create Custom Objects

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



## Second custom objects, let's call them "Department"

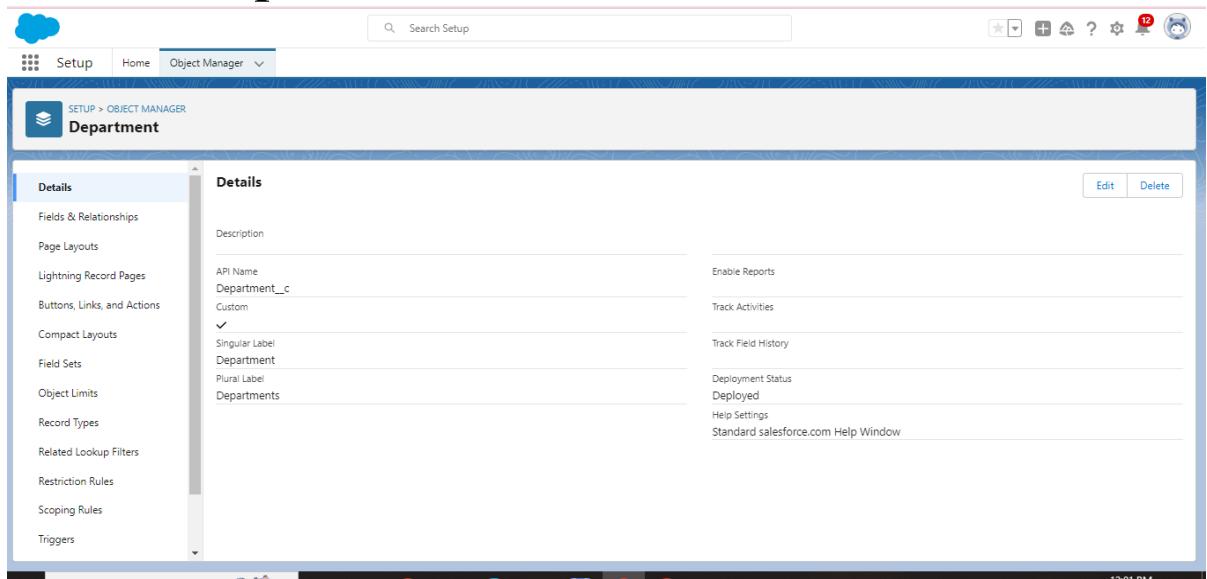


## Step 2: Create a Master-Detail Relationship

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

1. Go to Setup > Object Manager.
2. Click on "College" 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."
7. Choose " Department " as the related object.
8. Configure other settings as needed and click "Next."
9. Specify the field-level security and add it to relevant page layouts.
10. Click "Next" and "Save" to create the relationship.



The screenshot shows the Salesforce Setup interface for the 'college' object. The left sidebar is titled 'Fields & Relationships'. The main content area is titled 'Step 4. Establish field-level security for reference field'. It displays field-level security settings for the 'department' field, which is a Master-Detail relationship. The table shows profiles like 'Analytics Cloud Integration User' and 'Authenticated Website' with checkboxes for 'Visible' and 'Read-Only' permissions.

The screenshot shows the Salesforce Setup interface for the 'college' object. The left sidebar is titled 'Fields & Relationships'. The main content area is titled 'Step 6. Add custom related lists'. It shows the configuration for a new related list labeled 'colleges'. The 'Related List Label' is set to 'colleges'. Under 'Add Related List - Page Layout Name', the 'department Layout' checkbox is checked. There is also an option to 'Append related list to users' existing personal customizations'.

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

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

- 1. Still on the "College" 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" 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**

college | Salesforce New Tab

kiot67-dev-ed.lightning.force.com/lightning/setup/ObjectManager/015g000001JKVx/FieldsAndRelationships/view

Setup Home Object Manager

college

SETUP > OBJECT MANAGER

**Fields & Relationships**

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

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

Search Setup

11:09 ENG IN 03-10-2023

college | Salesforce New Tab

kiot67-dev-ed.lightning.force.com/lightning/setup/ObjectManager/015g000001JKVx/FieldsAndRelationships/view

Setup Home Object Manager

Department

SETUP > OBJECT MANAGER

**New Custom Field**

Step 3 of 5

Help for this Page

Previous Next Cancel

Select Object to Summarize

Master Object: Department  
Summarized Object: Colleges

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

Previous Next Cancel

Type here to search

30°C Mostly sunny 12:04 PM 10/3/2023

The top screenshot shows the 'New Custom Field' page for the 'department' object. It's Step 5 of 5, 'Add to page layouts'. The field details are: Field Label: college, Data Type: Roll-Up Summary, Field Name: college1. Under 'Page Layouts', 'department Layout' is selected. The bottom screenshot shows the 'Fields & Relationships' list for the 'department' object, displaying the newly created fields: college, college1, Created By, department Name, Last Modified By, and Owner.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
college	college__c	Roll-Up Summary (COUNT college)		
college	college1__c	Roll-Up Summary (COUNT college)		
Created By	CreatedById	Lookup(User)		
department Name	Name	Text(80)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		

## Step 4: Create a Lightning App

- 1. Type and select "App Manager."**
- 2. Click "New Lightning App."**
- 3. Fill in basic information (Name, Developer Name, Description).**

- 4. Choose the App Type (Standard, Console, Custom).**
- 5. Customize the Logo and Colour Scheme.**
- 6. Configure Navigation Items (objects to appear in the app's menu).**
- 7. Set the App Visibility (default access).**
- 8. Optionally, choose Record Pages (Lightning Record Pages).**
- 9. Review and Save the app.**
- 10. Assign the app to users or profiles.**
- 11. Test the app with the assigned users.**

The screenshot shows the Salesforce Setup interface. On the left, a sidebar lists various setup categories like Setup Home, Service Setup Assistant, and Administration. The main content area is titled "New Custom Object Tab" and is currently on "Step 2 of 3". It asks to choose user profiles for the new tab. A radio button is selected for "Apply one tab visibility to all profiles [Default On]". Below this, a table maps profiles to tab visibility settings. The profiles listed include Analytics Cloud Integration User, Analytics Cloud Security User, Authenticated Website, Authenticated Website, Contract Manager, Cross Org Data Proxy User, Custom: Marketing Profile, Custom: Sales Profile, Custom: Support Profile, and Customer Community Login User. Each profile has a dropdown menu set to "Default On". The status bar at the bottom shows it's 12:08 PM on 10/3/2023.

This screenshot shows the "New Custom Object Tab" setup page on "Step 1 of 3". It asks to choose a custom object for the tab. A dropdown menu shows "Object" selected with "Book" chosen. Below it, a "Tab Style" dropdown is set to "Camera". An optional field for a "Splash Page Custom Link" is set to "None". A text input field for "Description" is empty. At the bottom right are "Next" and "Cancel" buttons. The status bar at the bottom shows it's 11:36 AM on 03-10-2023.

Salesforce Tabs | Object Manager | Salesforce

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 > Data > Email PLATFORM TOOLS > Subscription Management > Apps > Feature Settings

Search Setup

## 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	Camera	

**Custom Object Tabs** [New] What Is This?

**Web Tabs** [New] What Is This?

No Web Tabs have been defined

**Visualforce Tabs** [New] What Is This?

No Visualforce Tabs have been defined

**Lightning Component Tabs** [New] What Is This?

No Lightning component tabs have been defined

**Lightning Page Tabs** [New] What Is This?

No Lightning Page Tabs have been defined

11:59 ENG IN 03-10-2023

App Manager | Salesforce | Object Manager | Salesforce

Search Setup

## Lightning Experience App Manager

New Lightning App New Connected App

App Name ▾ Developer Name ▾ Description ▾ Last Modified Date ▾ App T... ▾ Visib... ▾

App Name	Developer Name	Description	Last Modified Date	App T...	Visib...
1 All Tabs	AllTabSet		26/09/2023, 2:50 pm	Classic	✓
2 Analytics Studio	Insights	Build CRM Analytics dashboards and apps	26/09/2023, 2:50 pm	Classic	✓
3 App Launcher	AppLauncher	App Launcher tabs	26/09/2023, 2:50 pm	Classic	✓
4 Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	26/09/2023, 2:52 pm	Lightning	✓
5 Community	Community	Salesforce CRM Communities	26/09/2023, 2:50 pm	Classic	✓
6 Content	Content	Salesforce CRM Content	26/09/2023, 2:50 pm	Classic	✓
7 Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	26/09/2023, 2:50 pm	Lightning	✓
8 Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	26/09/2023, 2:50 pm	Lightning	✓
9 Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	26/09/2023, 2:50 pm	Lightning	✓
10 Marketing	Marketing	Best-in-class on-demand marketing automation	26/09/2023, 2:50 pm	Classic	✓
11 Platform	Platform	The fundamental Lightning Platform	26/09/2023, 2:50 pm	Classic	✓
12 Queue Management	QueueManagement	Create and manage queues for your business.	26/09/2023, 2:50 pm	Lightning	✓
13 Sales	Sales	The world's most popular sales force automation (SFA) solution	26/09/2023, 2:50 pm	Classic	✓
14 Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	26/09/2023, 2:50 pm	Lightning	✓

12:01 ENG IN 03-10-2023

Salesforce Tabs | Object Manager | Salesforce

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 > Data > Email PLATFROM TOOLS > Subscription Management > Apps > Feature Settings

Search Setup

## Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality. Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

### Custom Object Tabs

Action	Label	Tab Style	Description
Edit   Del	Books	Camera	

### 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.

11:59 ENG IN 03-10-2023

App Manager | Salesforce | Object Manager | Salesforce

jaya logo - Google Search

Search Setup

## 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	My College
* Developer Name	My_College
Description	Enter a description...

**App Branding**

Image:  Primary Color Hex Value: #007002

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

Next

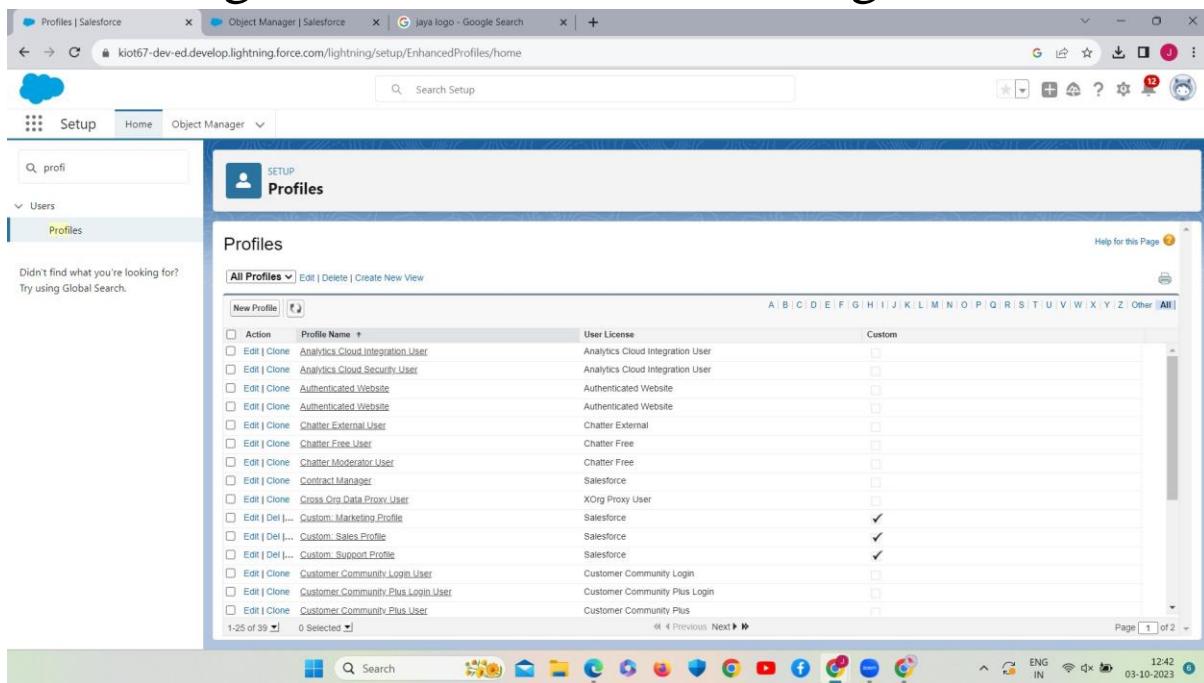
12 Queue Management QueueManagement Create and manage queues for your business. 26/09/2023, 2:50 pm Lightning ✓  
13 Sales Sales The world's most popular sales force automation (SFA) solution. 26/09/2023, 2:50 pm Classic  
14 Sales LightningSales Manage your sales process with accounts, leads, opportunities, and more. 26/09/2023, 2:50 pm Lightning ✓

12:13 ENG IN 03-10-2023

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 Manager and one for sales manager.



The screenshot shows the Salesforce Setup interface with the 'Profiles' page open. The URL in the browser is [kiot67-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/home](https://kiot67-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/home). The page title is 'Profiles'. On the left, there's a sidebar with 'Users' and 'Profiles' selected. The main area displays a list of profiles with columns for 'Action', 'Profile Name', 'User License', and 'Custom'. The 'Custom' column contains checkmarks for certain profiles like 'Salesforce' and 'Customer Community Plus'. The bottom right corner shows the date '03-10-2023' and time '12:42'.

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit   Clone	Analytics Cloud Integration User	Analytics Cloud Integration User	
<input type="checkbox"/> Edit   Clone	Analytics Cloud Security User	Analytics Cloud Integration User	
<input type="checkbox"/> Edit   Clone	Authenticated Website	Authenticated Website	
<input type="checkbox"/> Edit   Clone	Authenticated Website	Authenticated Website	
<input type="checkbox"/> Edit   Clone	Chatter External User	Chatter External	
<input type="checkbox"/> Edit   Clone	Chatter Free User	Chatter Free	
<input type="checkbox"/> Edit   Clone	Chatter Moderator User	Chatter Free	
<input type="checkbox"/> Edit   Clone	Contract Manager	Salesforce	
<input type="checkbox"/> Edit   Clone	Cross Org Data Proxy User	XOrg Proxy User	
<input type="checkbox"/> Edit   Del  ...	Custom - Marketing Profile	Salesforce	✓
<input type="checkbox"/> Edit   Del  ...	Custom - Sales Profile	Salesforce	✓
<input type="checkbox"/> Edit   Del  ...	Custom - Support Profile	Salesforce	✓
<input type="checkbox"/> Edit   Clone	Customer Community Login User	Customer Community Login	
<input type="checkbox"/> Edit   Clone	Customer Community Plus Login User	Customer Community Plus Login	
<input type="checkbox"/> Edit   Clone	Customer Community Plus User	Customer Community Plus	

The image displays two screenshots of the Salesforce Setup interface, illustrating the process of cloning and editing profiles.

**Screenshot 1: Clone Profile**

This screenshot shows the "Clone Profile" page. A search bar at the top left contains the text "profi". The main content area is titled "Clone Profile" and contains the following message: "Enter the name of the new profile." Below this, a note says "You must select an existing profile to clone from." A configuration section includes:

- Existing Profile: Salesforce API Only System Integrations
- User License: Salesforce Integration
- Profile Name: Manager

At the bottom are "Save" and "Cancel" buttons.

**Screenshot 2: Profile Edit**

This screenshot shows the "Profile Edit" page for the "Manager" profile. The left sidebar lists various setup categories, and the "Profiles" item under "Users" is selected. The main content area is titled "Manager" and contains the following information:

- Name: Manager
- User License: Salesforce Integration
- Description: (empty text area)

A "Custom Profile" checkbox is checked. Below this is a "Custom App Settings" table:

	Visible	Default
All Tabs (standard__AllTabSet)	<input type="checkbox"/>	<input checked="" type="radio"/>
Analytics Studio (standard__Insights)	<input type="checkbox"/>	<input type="radio"/>
App Launcher (standard__AppLauncher)	<input checked="" type="checkbox"/>	<input type="radio"/>
Bolt Solutions (standard__LightningBolt)	<input checked="" type="checkbox"/>	<input type="radio"/>
Community (standard__Community)	<input type="checkbox"/>	<input type="radio"/>
Content (standard__Content)	<input checked="" type="checkbox"/>	<input type="radio"/>
Data Manager (standard__DataManager)	<input type="checkbox"/>	<input type="radio"/>
Sales (standard__LightningSales)	<input checked="" type="checkbox"/>	<input type="radio"/>
Sales (standard__Sales)	<input checked="" type="checkbox"/>	<input type="radio"/>
Sales Console (standard__LightningSalesConsole)	<input checked="" type="checkbox"/>	<input type="radio"/>
Salesforce Chatter (standard__Chatter)	<input checked="" type="checkbox"/>	<input type="radio"/>
Salesforce Scheduler Setup (standard__LightningScheduler)	<input type="checkbox"/>	<input type="radio"/>
Sample Console (standard__ServiceConsole)	<input type="checkbox"/>	<input type="radio"/>
Service (standard__Service)	<input checked="" type="checkbox"/>	<input type="radio"/>

Profiles | Salesforce   Object Manager | Salesforce   jaya logo - Google Search

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

SETUP Profiles

Profile Edit Manager

Set the permissions and page layouts for this profile.

Profile Edit Name Manager User License Salesforce Integration Description Custom Profile ✓

Custom App Settings

	Visible	Default		Visible	Default
All Tabs (standard__AllTabSet)	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>	Sales (standard__LightningSales)	<input checked="" type="checkbox"/>	<input type="radio"/>
Analytics Studio (standard__Insights)	<input type="checkbox"/>	<input type="radio"/>	Sales (standard__Sales)	<input checked="" type="checkbox"/>	<input type="radio"/>
App Launcher (standard__AppLauncher)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales Console (standard__LightningSalesConsole)	<input checked="" type="checkbox"/>	<input type="radio"/>
Bolt Solutions (standard__LightningBolt)	<input checked="" type="checkbox"/>	<input type="radio"/>	Salesforce Chatter (standard__Chatter)	<input checked="" type="checkbox"/>	<input type="radio"/>
Community (standard__Community)	<input type="checkbox"/>	<input type="radio"/>	Salesforce Scheduler Setup (standard__LightningScheduler)	<input type="checkbox"/>	<input type="radio"/>
Content (standard__Content)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sample Console (standard__ServiceConsole)	<input type="checkbox"/>	<input type="radio"/>
Data Manager (standard__DataManager)	<input type="checkbox"/>	<input type="radio"/>	Service (standard__Service)	<input checked="" type="checkbox"/>	<input type="radio"/>

Required Information

SEARCH

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

SETUP Profiles

Books departments

Session Settings Session Times Out After 2 hours of inactivity Session Security Level Required at Log in None

Password Policies

User passwords expire in	90 days
Enforce password history	3 passwords remembered
Minimum password length	8
Password complexity requirement	Must include alpha and numeric characters
Password question requirement	Cannot contain password
Maximum invalid login attempts	10
Lockout effective period	15 minutes
Obfuscate secret answer for password resets	<input type="checkbox"/>
Require a minimum 1 day password lifetime	<input type="checkbox"/>
Don't immediately expire links in forgot password emails	<input type="checkbox"/>

SEARCH

**Profiles | Salesforce**

kiot67-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5g000001zP1H%2Fe%3FretURL%3D%252F00e5g000001zP1H%253Fsetupid%253DEnhanc...

Setup Home Object Manager

Search Setup

Hyperforce Assistant

Users Profiles

Data Mass Transfer Approval Requests

Feature Settings Data.com Prospector Preferences Prospector Users Functions

Marketing Lead Processes

Sales Products Asset Settings Product Schedules Settings Product Settings

Profile Edit Manager 1

Set the permissions and page layouts for this profile.

Profile Edit Name Manager 1 User License Analytics Cloud Integration User Description Custom Profile

Custom App Settings

	Visible	Default	Visible	Default
Analytics Studio (standard__Insights)	<input type="checkbox"/>	<input checked="" type="radio"/>	Platform (standard__Platform)	<input checked="" type="checkbox"/>
App Launcher (standard__AppLauncher)	<input type="checkbox"/>	<input checked="" type="radio"/>	WDC (standard__Work)	<input type="checkbox"/>
My College (My_College)	<input type="checkbox"/>	<input checked="" type="radio"/>		

Service Provider Access

Tab Settings  Overwrite users' personal tab customizations

**Users | Salesforce**

kiot67-dev-ed.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005%2Fe%3FretURL%3D%252F005%253FappLayout%253Fsetup%2526isUserEntityOverride%253D...

Setup Home Object Manager

Search Setup

Users

Permission Set Groups

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Service

Embedded Service

Message for In-App and Web User Verification

User Interface

Action Link Templates

New User

User Edit General Information

First Name	JAYA DHARANI A	Role	<None Specified>
Last Name	A	User License	Salesforce Platform
Alias	Ja	Profile	Manager 3
Email	2k20it12@kiot.ac.in	Active	<input checked="" type="checkbox"/>
Username	jaya@kiot.ac.in	Marketing User	<input type="checkbox"/>
Nickname	User109752331092779049	Offline User	<input type="checkbox"/>
Title	Worker	Knowledge User	<input type="checkbox"/>
Company	Kiot bank	Flow User	<input type="checkbox"/>
Department		Service Cloud User	<input type="checkbox"/>
Division		Site.com Contributor User	<input type="checkbox"/>
		Site.com Publisher User	<input type="checkbox"/>
		WDC User	<input type="checkbox"/>
		Data.com User Type	-None-
		Data.com Monthly Addition Limit	Default Limit (300)
		Accessibility Mode (Classic Only)	<input type="checkbox"/>
		High-Contrast Palette on Charts	<input type="checkbox"/>

ENG IN 10:51 17-10-2023

ENG IN 11:49 17-10-2023

Users | Salesforce

kiot67-dev-ed.lightning.force.com/lightning/setup/ManageUsers/home

Setup Home Object Manager

Search Setup

User

Users

All Users

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

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	<a href="#">Edit</a> A JAYA DHARANI	JA	jaya.dharanisagun@gmail.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	<a href="#">Edit</a> Chatter Expert	Chatter	chatty-005100000h3mdeaz@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	<a href="#">Edit</a> User_Integration	integ	integration@005100000h3mdeaz.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	<a href="#">Edit</a> User_Security	sec	insightsecurity@00d5g00000h3mdeaz.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

New User | Reset Password(s) | Add Multiple Users

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

Action Link Templates: <https://kiot67-dev-ed.lightning.force.com/one/one.app#/setup/ManageUsers/home>

Welcome to Salesforce: Verify your account

support@salesforce.com <support@salesforce.com> to me

11:17 17-10-2023

Gmail

Compose

Inbox 2,376

Starred

Snoozed

Sent

Drafts 3

More

Labels +

Search in mail

Welcome to Salesforce!

Click below to verify your account.

Verify Account

To easily log in later, save this URL:  
<https://kiot67-dev-ed.develop.my.salesforce.com>

Username:  
jaya@kiot.ac.in

Again, welcome to Salesforce!

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ENG IN 11:52 17-10-2023

Users | Salesforce

kiot67-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F0055g00000lhOU2%3Fredirect%3D1%26isUserEntityOverride%3D1

Setup Home Object Manager

Search Setup

User JAYA DHARANI AA

User Detail

Name: JAYA DHARANI AA  
Alias: ja  
Email: 2k20t12@kiot.ac.in [Verify]  
Username: jaya@kiot.ac.in  
Nickname: User16975233109277904981  
Title: Worker  
Company: Kiot bank  
Department:  
Division:  
Address:  
Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata)  
Locale: English (India)  
Language: English  
Delegated Approver: Manager  
Receive Approval Request Emails: Only if I am an approver  
Federation ID:  
App Registration: One-Time Password

Role: Salesforce Platform Manager  
User License: Manager\_3  
Profile: Marketing User  
Active: ✓  
Offline User:   
Flow User:   
Service Cloud User:   
Site.com Contributor User:   
Site.com Publisher User:   
WDC User:   
Mobile Push Registrations: View  
Data.com User Type: View  
Accessibility Mode (Classic Only):   
Debug Mode:   
High-Contrast Palette on Charts:

User ProfileHelp for this Page

ENG IN 11:51 17-10-2023

Welcome to Salesforce: Verify your email

Change Your Password | Salesforce

salesforce

Change Your Password

Enter a new password for jaya@kiot.ac.in. Make sure to include at least:

8 characters  
 1 letter  
 1 number

\* New Password

\* Confirm New Password

Security Question

In what city were you born?

\* Answer

ENG IN 11:53 17-10-2023

salesforce login - Search

https://login.salesforce.com

**salesforce**

Scale service with Generative AI and Einstein GPT.

Learn how AI and Einstein GPT are bringing intelligence and efficiency to service.

WATCH ON-DEMAND WEBINAR

Username  
keerthi@kiot.ac.in

Password  
.....

Log In

Remember me

Forgot Your Password? Use Custom Domain

Not a customer? Try for Free

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Windows Taskbar:

- Type here to search
- Users | Salesforce
- Welcome to Salesforce: Verify
- Lightning Experience | Salesforce
- 30°C Mostly sunny
- 1:51 PM 10/3/2023

Browser Address Bar:

kiot67-dev-ed.develop.lightning.force.com/one/one.app#eyJhb21wb25lbnREZWYiOjYXJrdXA6Ly9vbmuU6bm9OYZjdGvtclsImf0dHUpYnV0ZXMiOnsicmVzZXRIaXNOb3J5Jpp0cnVILCjb21wb2...  
12:02 17-10-2023

My College

No Items

Search...

Well, this is awkward. This app doesn't have any navigation items, or you can't access them.  
Learn More about how to personalize your navigation bar, or ask your admin for help.

Windows Taskbar:

- Search
- File Explorer
- Email
- Photos
- Calculator
- Google Chrome
- YouTube
- Facebook
- Microsoft Edge
- 12:02 17-10-2023

The screenshot displays two side-by-side views of the Salesforce interface.

**Left View (Salesforce Lightning Experience):**

- Header:** Sales, Home, Jaya A.
- Feed Post:** A post from "Jaya A" titled "A blank value to bank".
- Actions:** Like, Comment, Share.
- Text Input:** Write a comment...

**Right View (Setup Page - Profiles):**

- Header:** SETUP Profiles | Salesforce.
- Left Sidebar:** Q. prof, Users, Profiles (selected).
- Profile Edit:** salesmanager 1
- Fields:** Name (salesmanager 1), User License (Salesforce Platform), Description (empty), Custom Profile (checked).
- Custom App Settings:** Analytics Studio (standard\_Insights) (Visible: off, Default: on), App Launcher (standard\_AppLauncher) (Visible: off, Default: on), My College (My\_College) (Visible: on, Default: off). Platform (standard\_Platform) (Visible: on, Default: off), WDC (standard\_Work) (Visible: off, Default: on).
- Service Provider Access:** (disabled)
- Tab Settings:** (disabled)
- Buttons:** Save, Save & New, Cancel.

Both views show a Windows taskbar at the bottom with various application icons and system status.

Two screenshots of the Salesforce interface are shown side-by-side.

**Screenshot 1: User Profile Page**

The top screenshot shows the user profile for "JAYA DHARANI A". The profile includes a circular profile picture, the name "JAYA DHARANI A", the title "Worker", and the company "Kiot bank". Below the profile, there is a section titled "Details" with fields for Name, Title, Email, Manager, Company Name, and Phone. To the right, there is a "Related" section showing "Groups (0)" and "Files (0)". A banner at the top features a landscape with mountains, clouds, and a hot air balloon.

**Screenshot 2: Setup - All Users Page**

The bottom screenshot shows the "All Users" page in the Salesforce Setup. The sidebar on the left lists various setup categories like User Management Settings, Feature Settings, Data.com, Prospectors, Service, Embedded Service, and User Interface. The main content area displays a table of users with columns for Action, Full Name, Alias, Username, Role, Active, and Profile. One user is selected, showing details such as "Full Name: A\_JAYA.DHARANI", "Alias: JA", "Username: javadharanija@gmail.com", "Role: System Administrator", and "Active: Yes". Other users listed include "A\_JAYA.DHARANI", "Chatter Expert", "User\_Integration", and "User\_Security".

**Profiles | Salesforce**

Search Setup

Setup Home Object Manager

Users Profiles

Profile salesmanager 1

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

Profile Type: Standard | Last Modified: 17/10/2023, 12:41 pm | Created By: JAYA DHARANIA | Modified By: JAYA DHARANIA

Profile Detail

Name	salesmanager 1	User License	Salesforce Platform	Custom Profile	<input checked="" type="checkbox"/>
Description					
Created By	JAYA DHARANIA	Created Date	17/10/2023, 12:37 pm	Modified By	JAYA DHARANIA
Modified Date	17/10/2023, 12:41 pm				

Page Layouts

Standard Object Layouts	Global	Object Milestone
Email Application	Global Layout [View Assignment]	Object Milestone Layout [View Assignment]
Home Page Layout	Not Assigned [View Assignment]	Operating Hours Layout [View Assignment]
Account	Home Page Default [View Assignment]	Order Layout [View Assignment]
Alternative Payment Method	Account Layout [View Assignment]	Order Product Layout [View Assignment]
Appointment Invitation	Alternative Payment Method Layout [View Assignment]	Payment Layout [View Assignment]
	Appointment Invitation Layout	Payment Authorization Layout [View Assignment]

**Users | Salesforce**

Search Setup

Setup Home Object Manager

Users

New User

User Edit

General Information

First Name	JAYASHRI	Role	<None Specified>
Last Name	A S	User License	Salesforce Platform
Aliases	Ja s	Profile	salesmanager 1
Email	2k20it12@kiot.ac.in	Active	<input checked="" type="checkbox"/>
Username	jayashri@kiot.ac.in	Marketing User	<input type="checkbox"/>
Nickname	User109753024368153357	Offline User	<input type="checkbox"/>
Title	Worker	Knowledge User	<input type="checkbox"/>
Company	kiot bank	Flow User	<input type="checkbox"/>
Department	sales	Service Cloud User	<input type="checkbox"/>
Division		Site.com Contributor User	<input type="checkbox"/>
		Site.com Publisher User	<input type="checkbox"/>
		WDC User	<input type="checkbox"/>
		Data.com User Type	<None>
		Data.com Monthly Addition Limit	Default Limit (300)
		Accessibility Mode (Classic Only)	<input type="checkbox"/>
		High-Contrast Palette on Charts	<input type="checkbox"/>

Users | Salesforce

kiot67-dev-ed.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F0055g00000lhP5M%3Fredirect%3D1%26isUserEntityOverride%3D1

Setup Home Object Manager

Search Setup

User JAYASHRI A S

User Detail

Name	JAYASHRI A S	Role	Salesforce Platform
Alias	ja s	User License	Active
Email	2k2012@kiot.ac.in [Verify]	Profile	salesmanager_1
Username	jayashri@kiot.ac.in	Marketing User	<input checked="" type="checkbox"/>
Nickname	User16975302456815335746	Offline User	<input type="checkbox"/>
Title	Worker	Knowledge User	<input type="checkbox"/>
Company	kiot bank	Flow User	<input type="checkbox"/>
Department	sales	Service Cloud User	<input type="checkbox"/>
Division		Site.com Contributor User	<input type="checkbox"/>
Address		Site.com Publisher User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	WDC User	<input type="checkbox"/>
Locale	English (India)	Mobile Push Registrations	<input checked="" type="checkbox"/>
Language	English	Data.com User Type	<input type="checkbox"/>
Delegated Approver		Accessibility Mode (Classic Only)	<input type="checkbox"/>
Manager		Debug Mode	<input type="checkbox"/>
Receive Approval Request Emails	Only if I am an approver	High-Contrast Palette on Charts	<input type="checkbox"/>
Federation ID		Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>

User Management Settings

- Permission Set Groups
- Permission Sets
- Profiles
- Public Groups
- Queues
- Roles
- Users
- Feature Settings
- Data.com
- Prospector Users
- Service
- Embedded Service
- Messaging for In-App and Web User Verification
- User Interface
- Action Link Templates

Profiles | Salesforce

about:blank#blocked Insufficient Privileges Errors

kiot-3f-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j00000nnGK%2Fe%3FretURL%3D%252F00e5j00000nnGK...

Setup Home Object Manager

Search Setup

Profiles

Session Settings

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

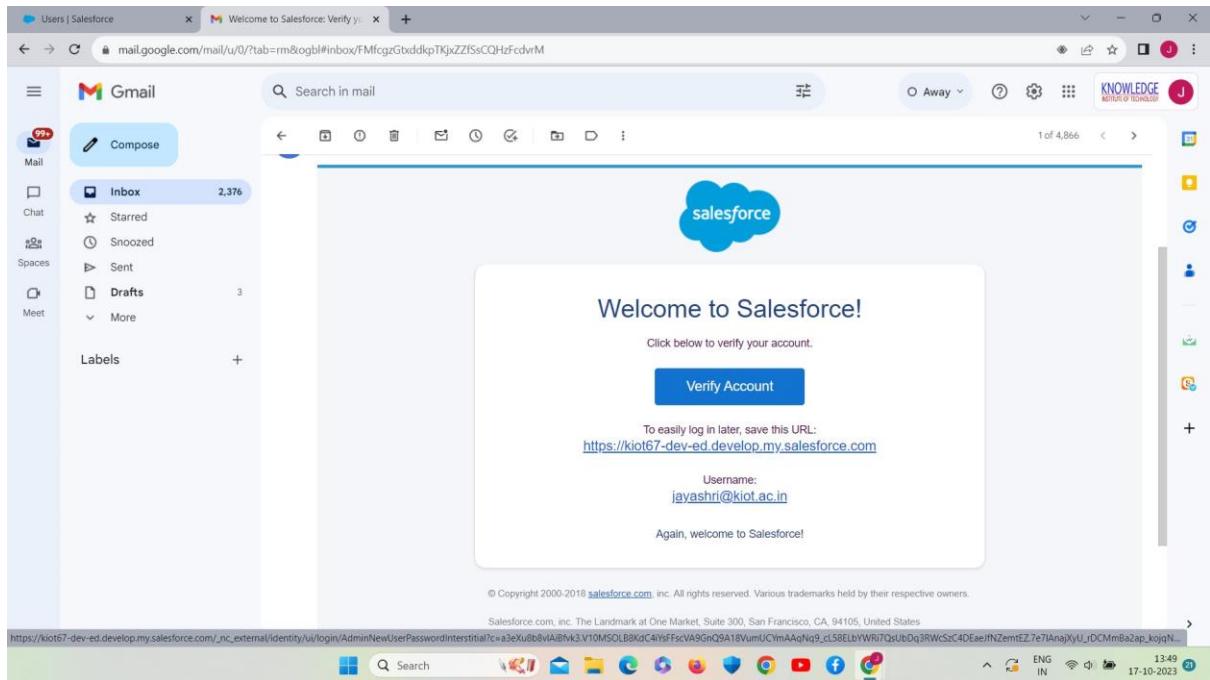
Password Policies

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
Maximum invalid login attempts	10	Password question requirement	Cannot contain password
Lockout effective period	15 minutes	Obscure secret answer for password resets	<input type="checkbox"/>
Require a minimum 1 day password lifetime		Don't immediately expire links in forgot password emails	<input type="checkbox"/>

Hyperforce Assistant

- Users
- Profiles
- Data
- Mass Transfer Approval Requests
- Feature Settings
- Data.com
- Prospector Preferences
- Prospector Users
- Functions
- Marketing
- Lead Processes
- Sales
- Products
- Asset Settings

Type here to search



## Step 2:

### Permission Sets:

- Create two permission sets, one for manager and one for sales manager.

### Object-Level Security:

- In each profile and permission set, set the object-level security for the Account object to

"Read" to ensure that both I-manager and I- sales manager 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 manager with manager and records owned by I sales manager with sales manager.
- For the sharing rule criteria, specify that records owned by manager are shared with user A, and records owned by sales manager are shared with sales manager.

#### Ownership:

- Ensure that the Account records are owned by the respective users, with manager owning their records and sales manager 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 manager and sales manager separately to verify that they cannot access each other's records.

The screenshot shows the Salesforce Setup interface with the 'Permission Sets' tab selected. On the left, a sidebar lists various setup categories like Users, Feature Settings, and Sales. The main content area displays the 'Permission Set Overview' for 'salesmanager1'. It includes fields for Description (empty), API Name (salesmanager1), License (empty), Session Activation Required (unchecked), Namespace Prefix (empty), Last Modified By (KEERTHIKA\_G), and Created By (KEERTHIKA\_G). Below this is a section titled 'Apps' which contains three sub-sections: 'Assigned Apps', 'Assigned Connected Apps', and 'Object Settings'. A status bar at the bottom shows it's 3:28 PM on 10/3/2023.

This screenshot shows the 'Object Settings' page for the 'salesmanager1' permission set. The sidebar remains the same. The main content area shows a table of object permissions. The table has columns for Object Name, Object Permissions, Total Fields, and Tab Settings. Objects listed include Accounts, AI Insight Reasons, AI Record Insights, Alternative Payment Methods, API Anomaly Event Stores, App Analytics Query Requests, Application Usage Assignments, Appointment Categories, and Appointment Invitations. Most objects have 'No Access' permissions. A status bar at the bottom shows it's 3:39 PM on 10/3/2023.

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	--
App Analytics Query Requests	No Access	--	--
Application Usage Assignments	No Access	--	--
Appointment Categories	No Access	3	--
Appointment Invitations	No Access	17	--

This screenshot shows the 'Object Settings' page for the 'books' object within the 'salesmanager1' permission set. The sidebar is identical. The main content area shows the 'Object Settings' for 'books'. It includes a 'Tab Settings' section where 'Available' and 'Visible' tabs are shown. Under 'Object Permissions', there is a table with columns for Permission Name and Enabled. The permissions listed are Read, Create, Edit, and Delete, all with checkboxes unchecked. A status bar at the bottom shows it's 3:40 PM on 10/3/2023.

Permission Name	Enabled
Read	<input type="checkbox"/>
Create	<input type="checkbox"/>
Edit	<input type="checkbox"/>
Delete	<input type="checkbox"/>

The screenshot shows the Salesforce Setup interface with the 'Permission Sets' tab selected. The left sidebar includes sections for Profiles, Public Groups, Queues, Roles, User Management Settings, and Users (with sub-options for Data, Email, Platform Tools, Subscription Management, Apps, Feature Settings, Slack, MuleSoft, and Einstein). The main content area displays the 'Permission Sets' page with sections for Available and Visible profiles, Object Permissions (listing Read, Create, Edit, Delete, View All, and Modify All), and Field Permissions (listing book Name and Created By). The status bar at the bottom shows system information like weather (30°C Mostly sunny), time (3:40 PM), and date (10/3/2023).

The screenshot shows the Salesforce Setup interface with the 'Permission Sets' tab selected. The left sidebar includes sections for Users, Permission Set Groups, and Permission Sets (which is currently selected). The main content area displays the 'Select Users to Assign' page, showing a list of users under the 'All Users' filter. The list includes Chatter Expert, Integration User, JAYA DHARANI A, JAYA DHARANI A, JAYASHRI A S, and Security User. A tooltip from K7TotalSecurity indicates that the license has expired. The status bar at the bottom shows system information like time (15:12) and date (17-10-2023).

Setup Home Object Manager

Permission Sets

- Profiles
- Public Groups
- Queues
- Roles
- User Management Settings
- Users
  - > Data
  - > Email
- PLATFORM TOOLS
  - > Subscription Management
  - > Apps
  - > Feature Settings
  - > Slack
  - > MuleSoft
  - > Einstein
  - > Objects and Fields
  - > Events
  - > Process Automation
  - > User Interface

salesmanager1

Current Assignments

No assignments defined.

Add Assignment

Permission Sets | Salesforce

Select an Expiration Option For Assigned Users

No expiration date

Specify the expiration date

1 Day 1 Week 30 Days 60 Days Custom Date

Time Zone Select a time zone...

Selected Users

Full Name	Role	Profile	Active	User License	Expires On
JAYASHRI A S	salesmanager 1		✓	Salesforce Platform	Never Expires

Cancel Back Assign

Search ENG IN 17-10-2023 15:12

The image contains two side-by-side screenshots of the Salesforce Setup interface.

**Screenshot 1 (Top):** This screenshot shows the 'Assignment Summary' page for the 'salesmanager' permission set. The table displays one assignment:

Full Name	User License	Expires On	Time Zone	Status
JAYASHRI A S	Salesforce Platform			Success

**Screenshot 2 (Bottom):** This screenshot shows the 'Current Assignments' page for the 'salesmanager' permission set. The table displays the same assignment:

Full Name	Active	Role	Profile	User License	Expires On
JAYASHRI A S	✓		salesmanager 1	Salesforce Platform	

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

## Solution:

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

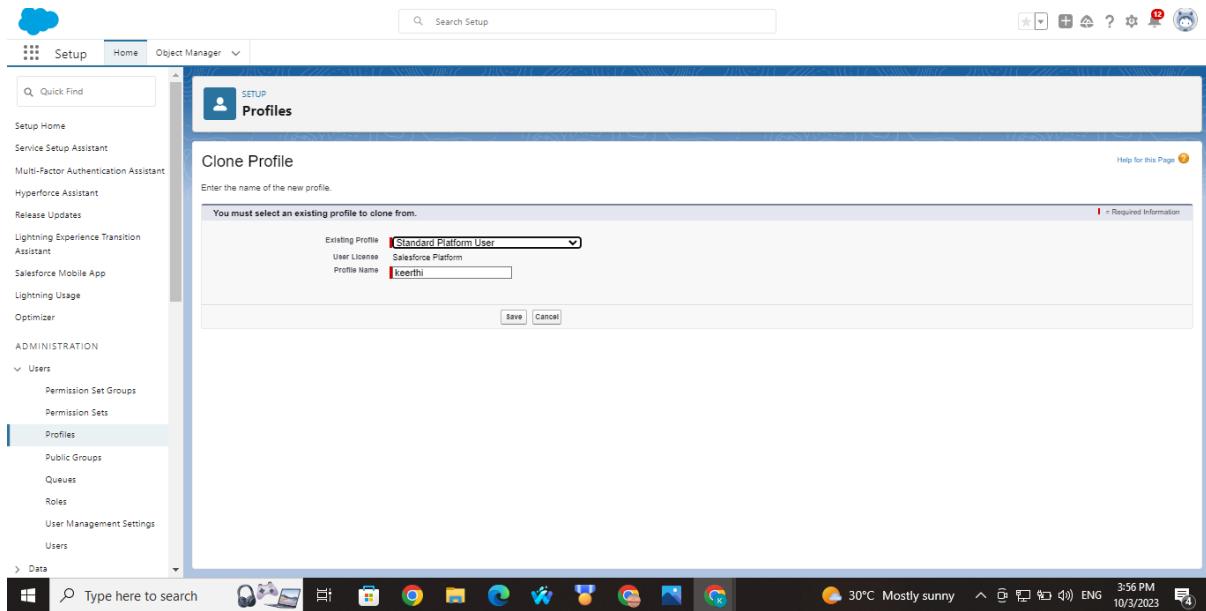
## Setup-quick search[profile]

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

- Left Navigation Bar:** Includes sections like Hyperforce Assistant, Users (Profiles selected), Data, Feature Settings, Sales, Products, Asset Settings, Product Schedules, Sales Processes, and Salesforce Scheduler.
- Header:** Shows "Search Setup" and various navigation icons.
- Page Title:** "SETUP Profiles".
- Profile Detail:** Profile Name: keerthi, User License: Salesforce Platform, Description: null, Created By: KEERTHIKAG, Created Date: 03/10/2023, 3:54 pm, Modified By: KEERTHIKAG, Modified Date: 03/10/2023, 3:54 pm. A "Custom Profile" checkbox is checked.
- Page Layouts:** Shows Standard Object Layouts for various objects like Global, Email Application, Home Page Layout, Account, Alternative Payment Method, etc., along with their respective layouts and assignment links.
- Bottom Status Bar:** Includes a search bar, system status (30°C, Mostly sunny), and system information (3:54 PM, 10/3/2023).

## Step 2:

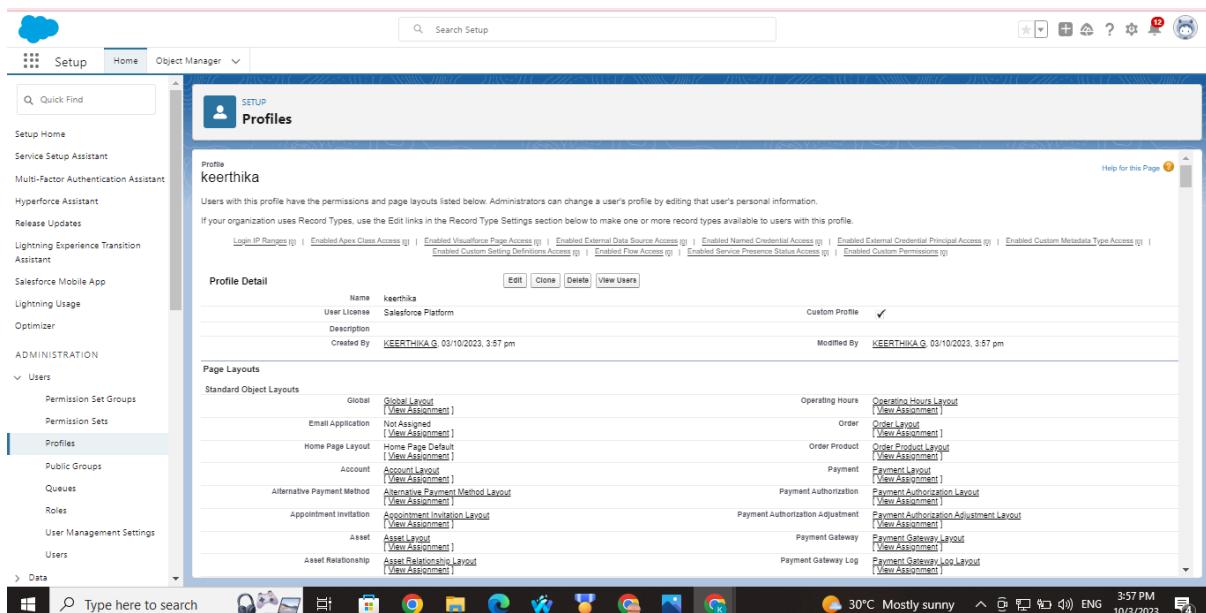
Click on the new to create a new profile along with the label and Api



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

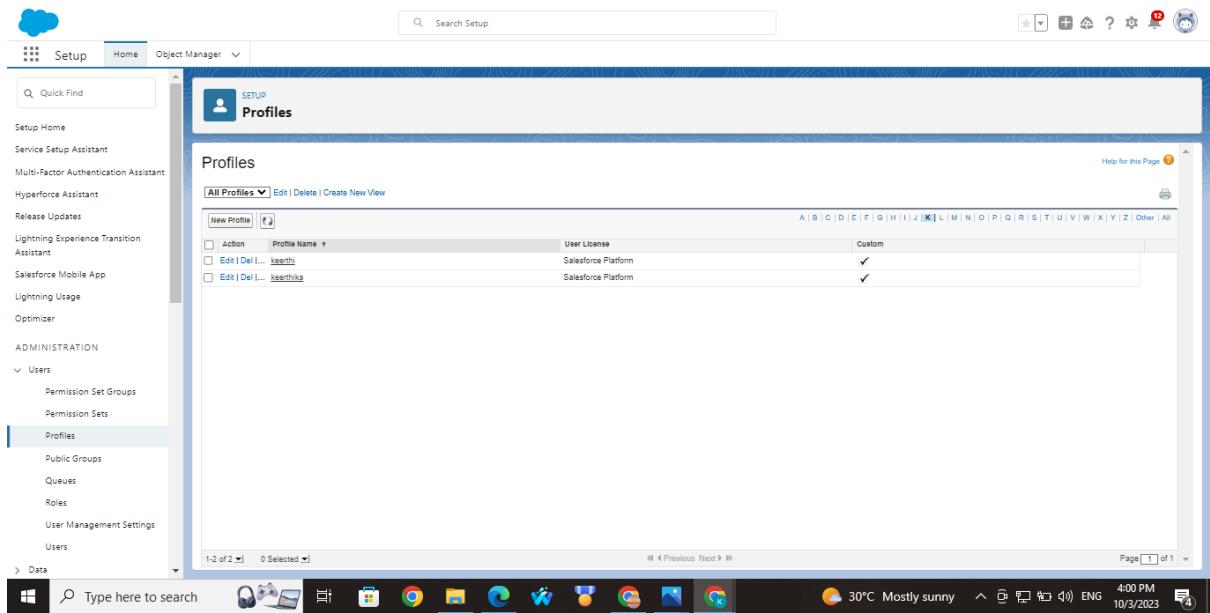
### Step 3:

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



## Step 4

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



## Step 5:

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

The screenshot shows the Salesforce Setup interface under the 'Users' section. The left sidebar includes options like Permission Set Groups, Profiles, Public Groups, Queues, Roles, User Management Settings, Feature Settings, Data.com, Service, Embedded Service, and User Interface. The main content area is titled 'All Users' and lists several users with their details:

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	A Java	ajava	keerthi@kiot.ac.in		<input checked="" type="checkbox"/>	Partner App Subscription User
<input type="checkbox"/>	Chatter Expert	Chatter	chatty.00d500000dbourash.mysfe3o3ia@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	S KEERTHIKA	KG	2x20tf2@kiot.ac.in		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	User Integration	integ	integration.00d400000dbocuan.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	User Security	sec	insightssecurity@00d500000dbourash.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User
<input type="checkbox"/>	y Java	vy	vrina@kiot.ac.in		<input checked="" type="checkbox"/>	salesmanager1

At the bottom of the list, there are buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'. The URL in the address bar is https://kiot-3f-dev-ed.lightning.force.com/one/one.app#/setup/Manage... . The system status bar shows 30°C Mostly sunny, ENG, 4:03 PM, and 10/3/2023.

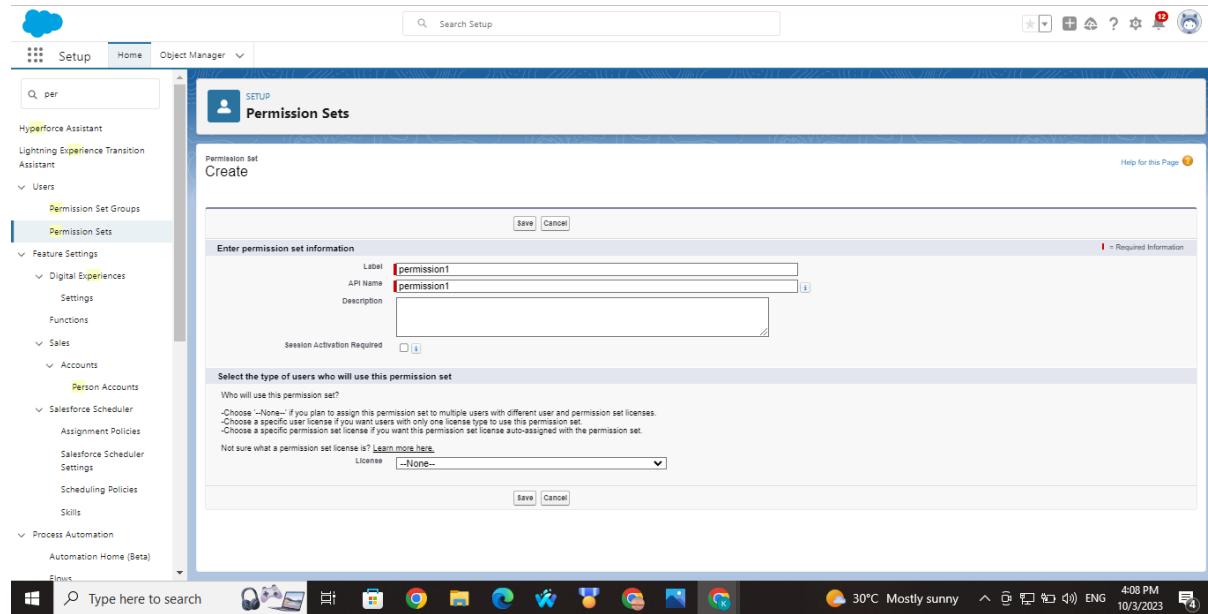
The screenshot shows the 'New User' creation form in the Salesforce Setup interface. The left sidebar is identical to the previous screenshot. The main form is titled 'New User' and contains the 'User Edit' tab. The 'General Information' section includes fields for First Name (keerthi), Last Name (G), Alias (kg), Email (keerthi@kiot.ac.in), Username (keerthi@kiot.ac.in), Nickname (User16963291938243152), Title, Company, Department, and Division. To the right of these fields are dropdown menus for Role (<None Specified>), Profile (Partner App Subscription User), and Data.com User Type (None). There are also checkboxes for Marketing User, Office User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, and various checkboxes for Data.com settings like Accessibility Mode (Classic Only), High-Contrast Palette on Charts, Load Lightning Pages While Scrolling, Debug Mode, and Quick Access Menu. The URL in the address bar is https://kiot-3f-dev-ed.lightning.force.com/one/one.app#/setup/Manage... . The system status bar shows 30°C Mostly sunny, ENG, 4:04 PM, and 10/3/2023.

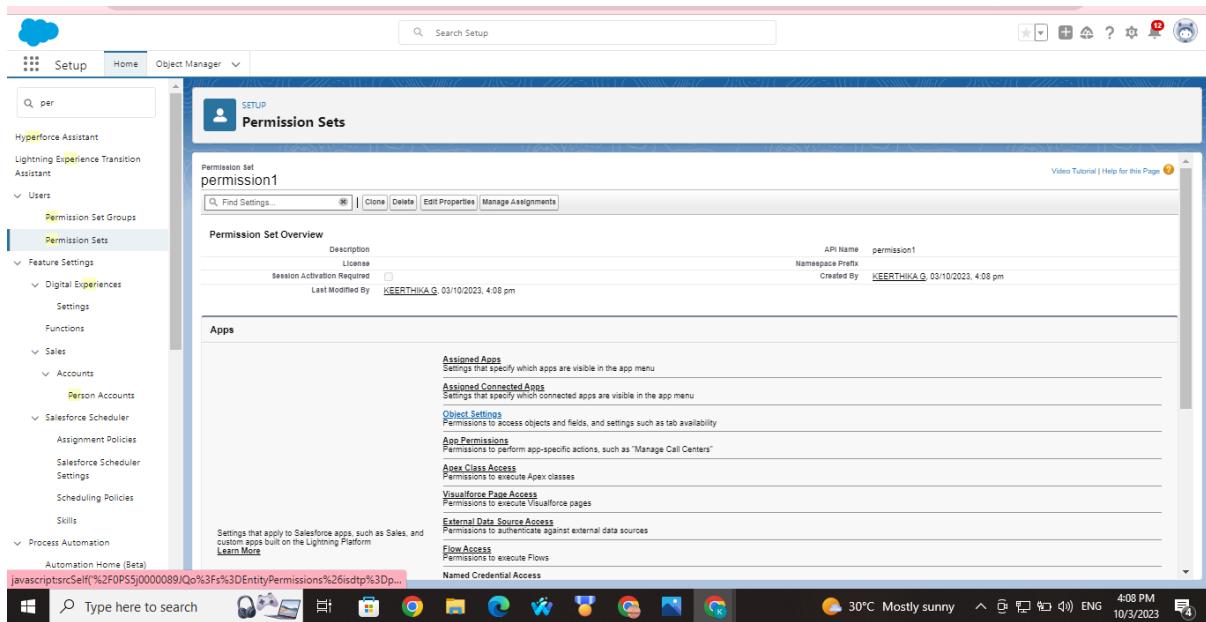
Now you can preview your two user that you have created in my side I had create the two users a Jagadesh11 and Jagadesh22 as a director channel sales with the marketing team.

Step 6:

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

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





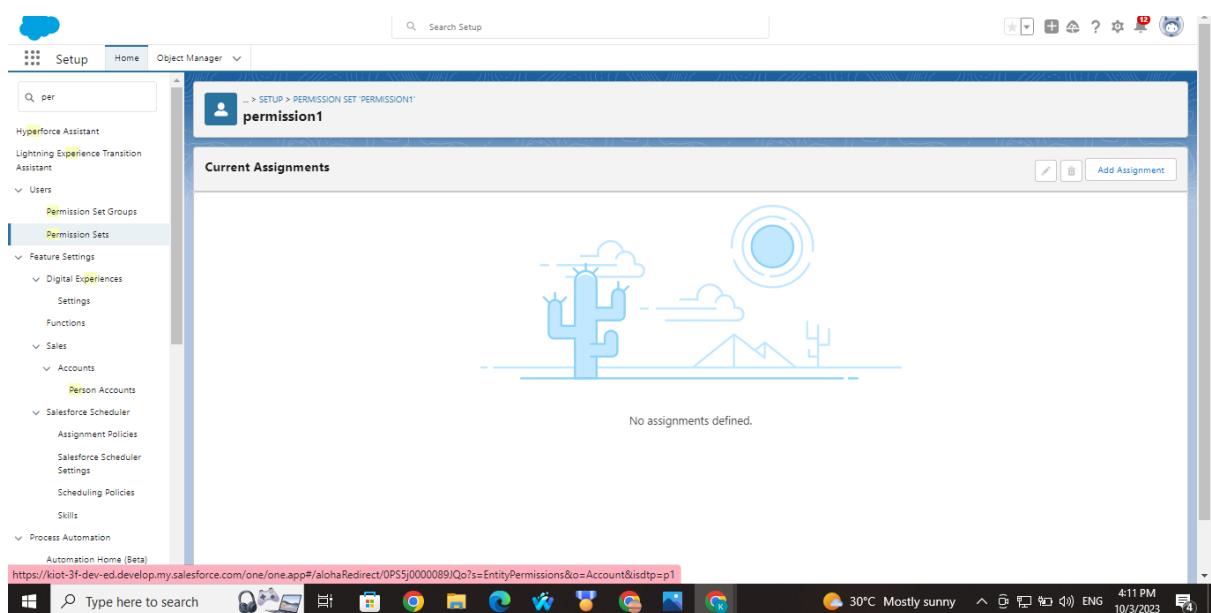
## Step 7:

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

The screenshot shows the Salesforce Setup interface with the 'Permission Sets' page open. The URL in the browser bar is <https://kiot-3f-dev-ed.my.salesforce.com/one/one.app#/alohaRedirect/0PS500000089/Qo?set=EntityPermissions&o=Account&isdtp=p1>. The page displays the 'permission1' permission set for the 'Accounts' object. Under 'Object Permissions', 'Read' is checked. Under 'Field Permissions', 'Account Name' has 'Read Access' checked and 'Edit Access' unchecked.

## Step 8

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



# Click on next

Permission Sets | Salesforce

kiot67-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/OP5g00000BBUhP/PermissionSetAssignment/new

Setup Home Object Manager

PERMI

Users

Permission Set Groups

Permission Sets

Custom Code

Custom Permissions

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

Select Users to Assign

All Users

6 items • Sorted by Full Name • Filtered by All users • Updated a few seconds ago

<input type="checkbox"/>	Full Name ↑	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Chatter Expert	Chatter	chatty.00d5g0000kh3mdeaz.5j8lexo6uhqx@chatter.salesforce.com	<input checked="" type="checkbox"/>	Chatter Free User	<input type="button" value="▼"/>
<input type="checkbox"/>	Integration User	integ	integration@00d5g0000kh3mdeaz.com	<input checked="" type="checkbox"/>	Analytics Cloud Integration User	<input type="button" value="▼"/>
<input type="checkbox"/>	JAYA DHARANI A	JA	jayadharanialaguvvel@gmail.com	<input checked="" type="checkbox"/>	System Administrator	<input type="button" value="▼"/>
<input type="checkbox"/>	JAYA DHARANI A	ja	jaya@kiot.ac.in	<input checked="" type="checkbox"/>	Manager 3	<input type="button" value="▼"/>
<input type="checkbox"/>	JAYASHRI A S	ja s	jayashri@kiot.ac.in	<input checked="" type="checkbox"/>	salesmanager 1	<input type="button" value="▼"/>
<input type="checkbox"/>	Security User	sec	insightssecurity@00d5g0000kh3mdeaz.com			

Cancel

K7TotalSecurity  
K7TotalSecurity License has expired.  
Click here to resolve..

Permission Sets | Salesforce

kiot67-dev-ed.lightning.force.com/lightning/setup/PermSets/OP55g00000BBUhP/PermissionSetAssignment/new

Setup Home Object Manager

PERMI

Users

Permission Set Groups

Permission Sets

Custom Code

Custom Permissions

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

Select Users to Assign

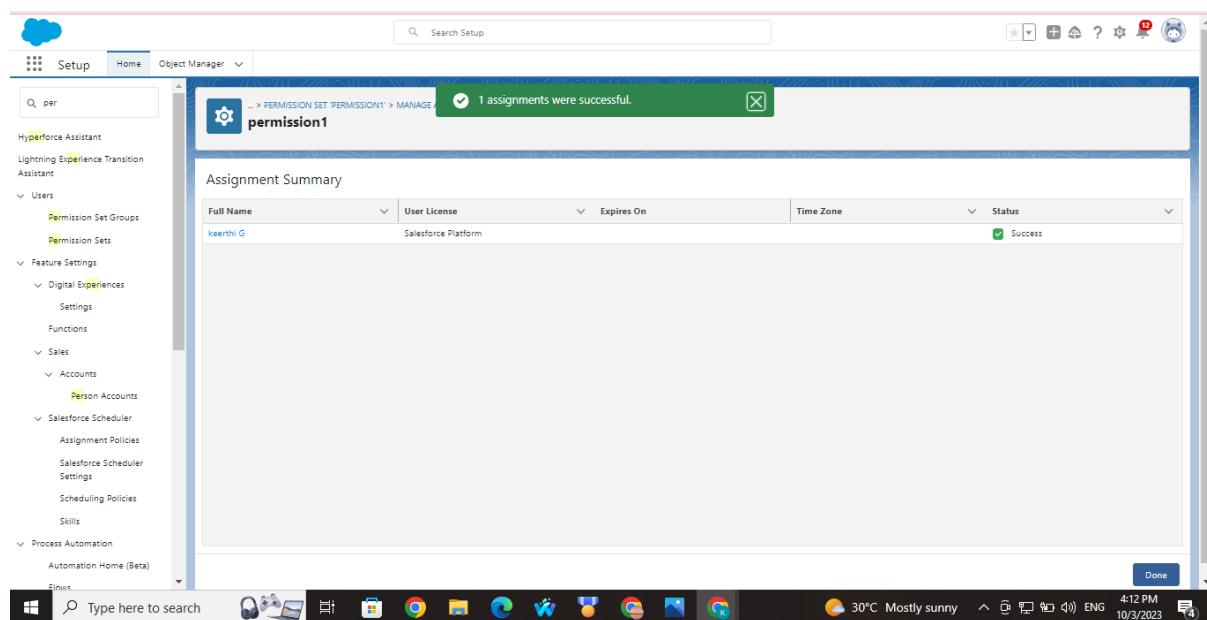
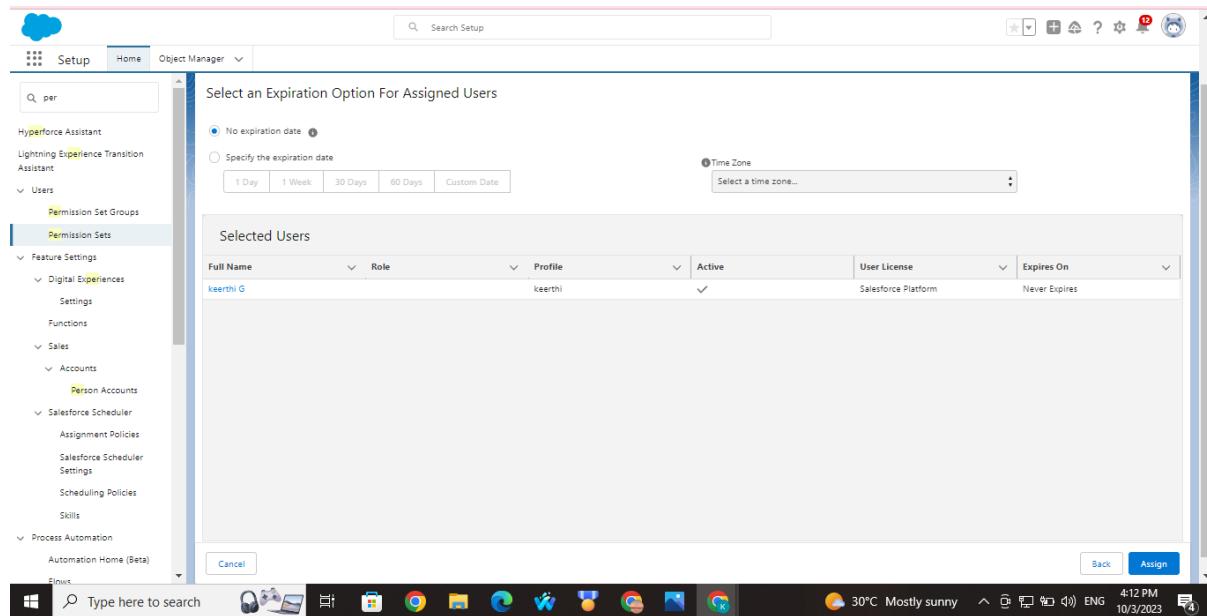
All Users

<input type="checkbox"/>	Full Name ↑	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Chatter Expert	Chatter	chatty.00d5g0000kh3mdeaz.5j8lex0uhq@chatter.salesforce.com	<input checked="" type="checkbox"/>	Chatter Free User	<input type="button" value="Edit"/>
<input type="checkbox"/>	Integration User	integ	integration@00d5g0000kh3mdeaz.com	<input checked="" type="checkbox"/>	Analytics Cloud Integration User	<input type="button" value="Edit"/>
<input type="checkbox"/>	JAYA DHARANI A	JA	jayadharanialaguvvel@gmail.com	<input checked="" type="checkbox"/>	System Administrator	<input type="button" value="Edit"/>
<input type="checkbox"/>	JAYA DHARANI A	ja	jaya@kiot.ac.in	<input checked="" type="checkbox"/>	Manager 3	<input type="button" value="Edit"/>
<input type="checkbox"/>	JAYASHRI A S	ja s	jayashri@kiot.ac.in	<input checked="" type="checkbox"/>	salesmanager 1	<input type="button" value="Edit"/>
<input type="checkbox"/>	Security User	sec	insightssecurity@00d5g0000kh3mdeaz.com			

Cancel

K7TotalSecurity  
K7totalSecurity License has expired.  
Click here to resolve.

# Now click on Assign.



Now the specific access for the Jagadesh11 user has been assigned successfully.

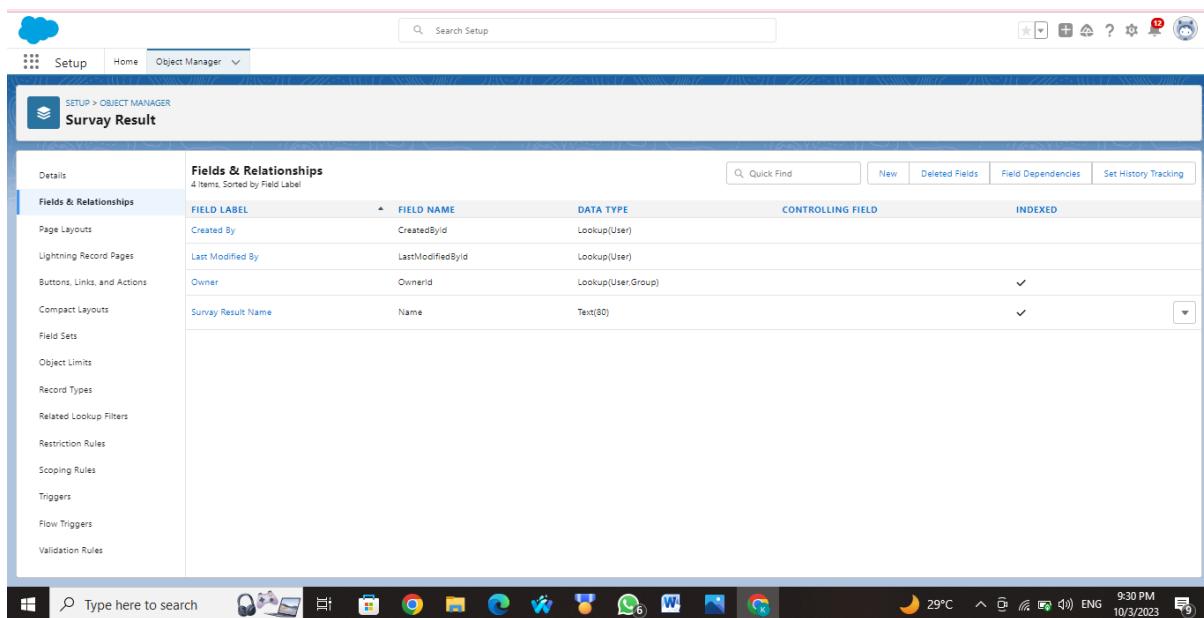
4.Create a screen flow for a basic survey to fill in the details for any form.

Solution:

Step 1: Create a Custom Object

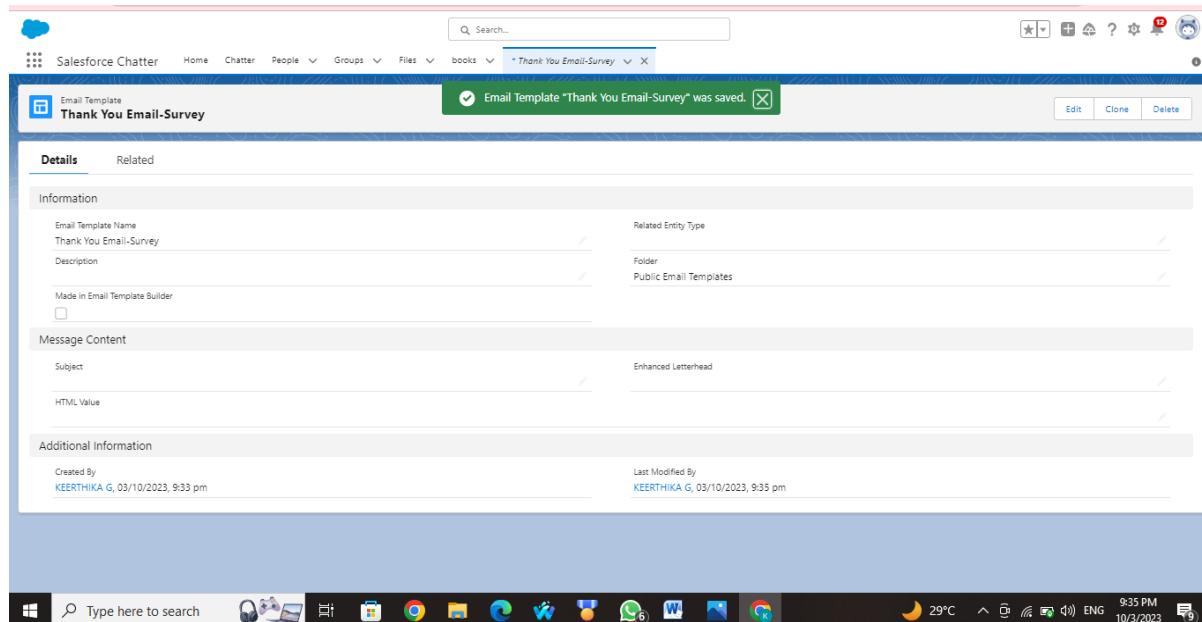
The next step is to create a custom object **Survey Result** and a few custom fields to store survey responses.

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



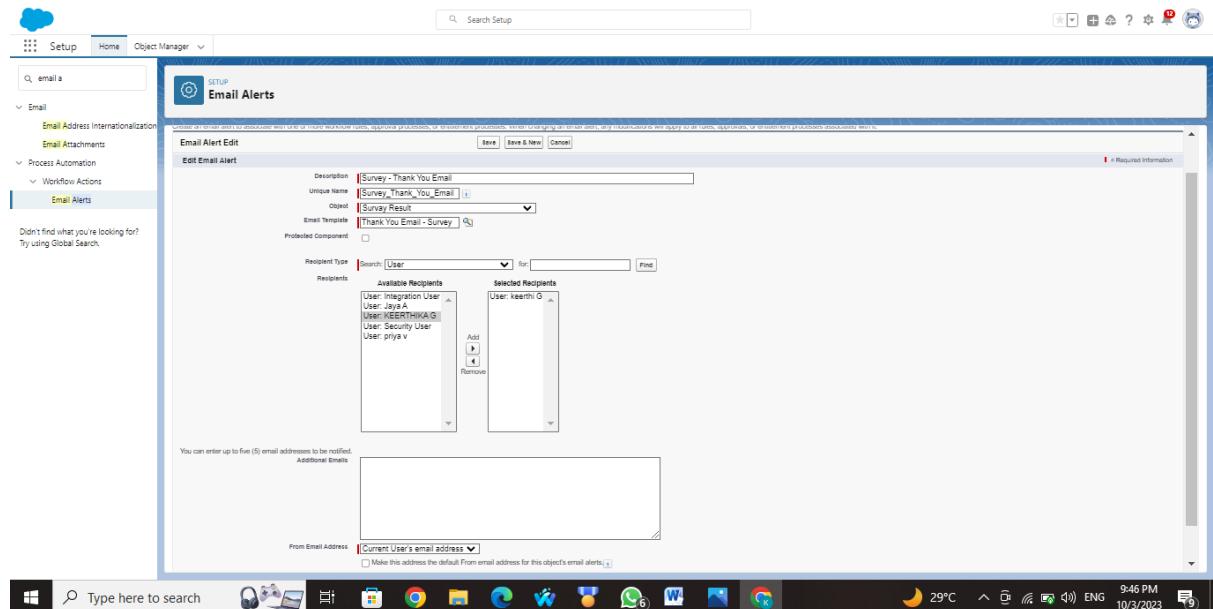
## Step 2: Create a Thank You For Survey Lightning Email Template

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:
  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** object from the dropdown list.

**6. Set Field Values for the Survey Result**

1. Row 1:

1. **Field: Comment\_c**

2. **Value: {!Comment}**

2. Click **Add Row**

3. Row 2:

1. **Field: Email\_c**

2. **Value: {!Email.value}**

4. Click **Add Row**

5. Row 3:

1. **Field: Name\_c**

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

**{!Name.lastName}**

6. Click **Add Row**

7. Row 3:

1. **Field: Rating\_c**

2. **Value: {!Rating}**

7. Click **Done**.

Edit Create Records

Create Salesforce records using values from the flow.

\* Label: Save Response      \* API Name: Save\_Response

Description:

How Many Records to Create  
 One  
 Multiple

How to Set the Record Fields  
 Use all values from a record  
 Use separate resources, and literal values

Create a Record of This Object  
\* Object: Survey Result

Set Field Values for the Survey Result

Field	Value
Comment__c	<input type="text" value="A_a Comment"/>
Email__c	<input type="text" value="A_a Email &gt; Value"/>
Name__c	<input type="text" value="(!Name.firstName) {!Name.lastName}"/>
Rating__c	<input type="text" value="A_a Rating"/>
<a href="#">+ Add Field</a>	
<input type="checkbox"/> Manually assign variables	

Cancel      Done

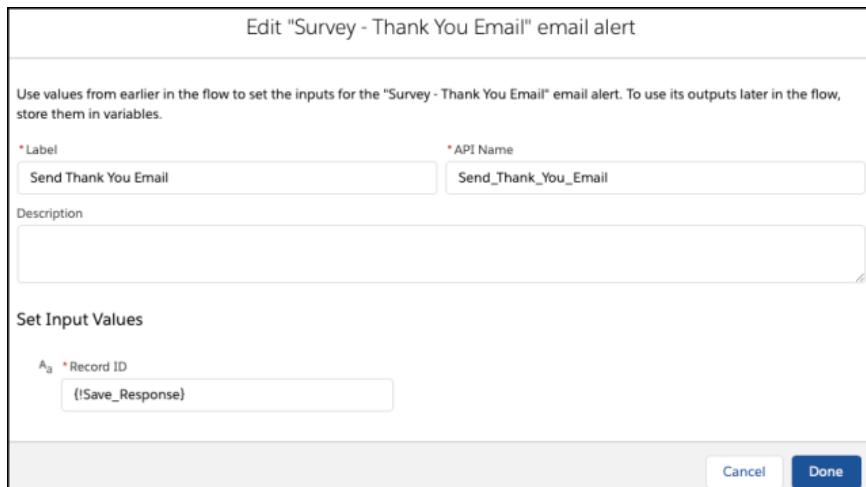
## Step 4.3: Salesforce Flow — Call an Acton — Email Alert to Send Out Thank You Email

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

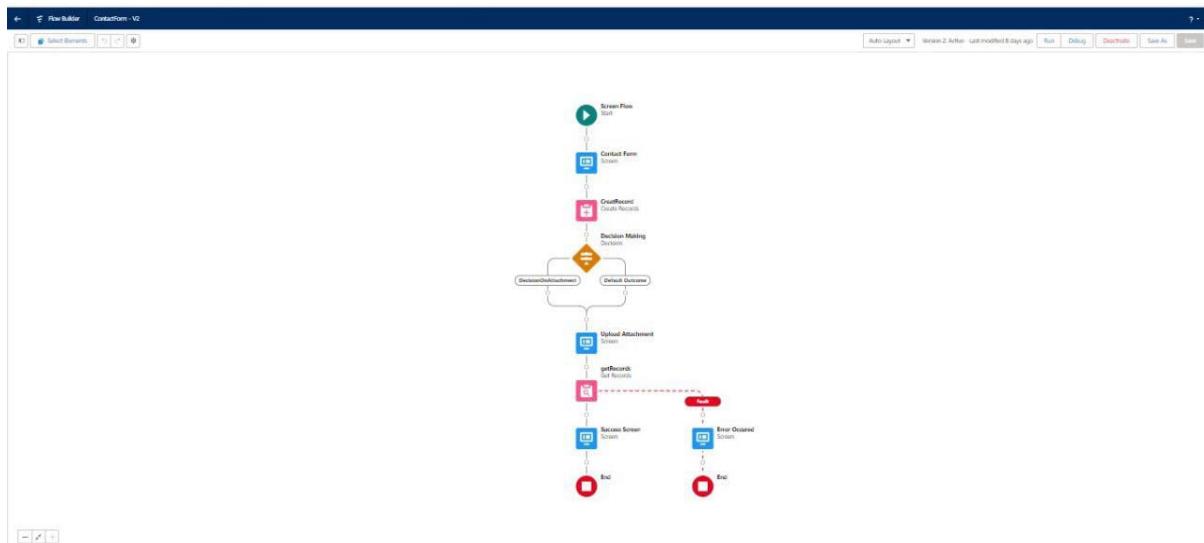
1. Under **Toolbox**, select **Element**.
2. Drag-and-drop **Action** element onto the Flow designer.
3. In the **Action** box, type **Survey – Thank You Email**.

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

### 5. Click Done.



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 \* Flow API Name

Survey 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

The screenshot shows the 'Save as' dialog for a new flow. The 'A New Version' button is highlighted. The flow is named 'Survey' with an API name of 'Survey'. The 'How to Run the Flow' setting is 'User or System Context—Depends on How Flow is Launched'. The flow type is 'Screen Flow' and the API version is '51'. The interview label is set to the formula '{!\$Flow.CurrentDateTime}'. The status is 'Active', the type is 'Screen Flow', and the version number is '2'. The dialog includes 'Cancel' and 'Save' buttons.

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

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

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

The screenshot shows the Salesforce IDE interface. At the top, there is a menu bar with options like File, Edit, Debug, Test, Workspace, Help, and navigation arrows. Below the menu is a tab bar with 'VFPageToLC.app \*'. The main area contains the following code:

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

At the bottom of the interface, there is a blue bar labeled 'Logs, Tests, and Problems'.

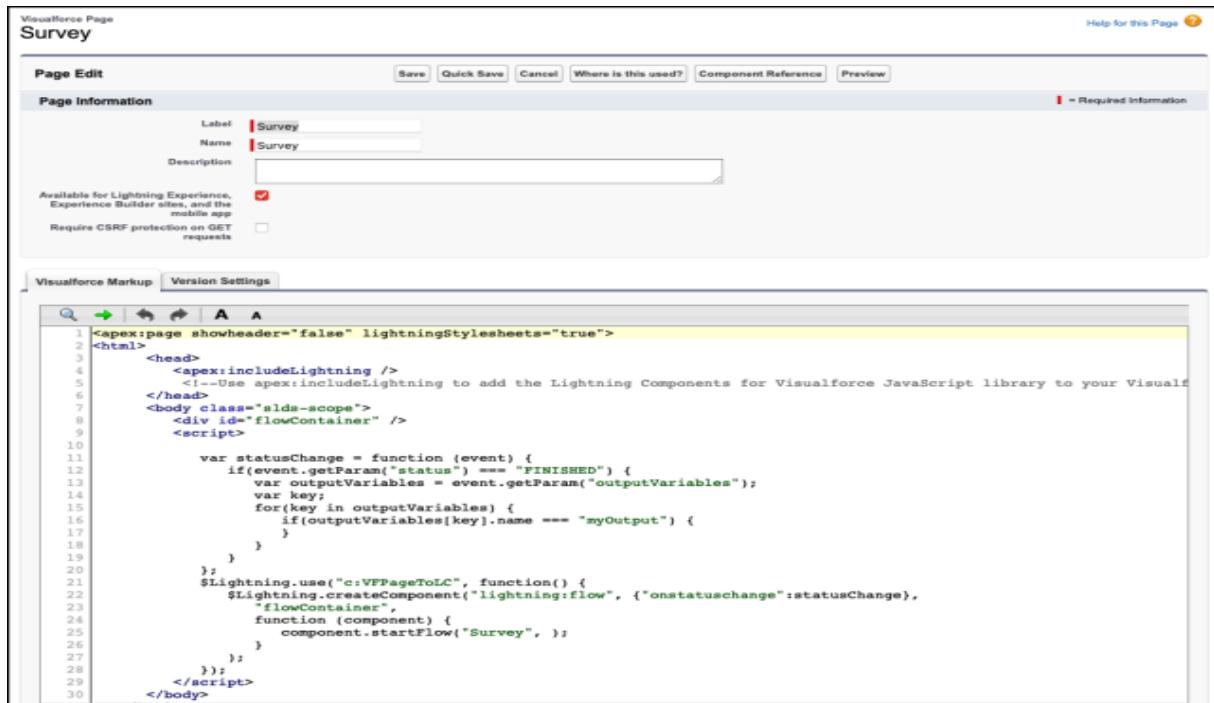
## Step 6: Create a Visualforce Page and Embed Your Flow Into It

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

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

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

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



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

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

1. Click **Setup**.

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

**Site Edit**

**Save** **Cancel**

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

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

## Proof of Concept

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

Survey

Name

First Name  
Alok

Last Name  
Sinfal

\*Email  
[REDACTED]

\*Rating  
5

\*Comment  
Awesome Blog 

**Next**

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

Thank You For Completing Our Survey!  [Inbox](#)  

 **Survey Site Guest User** via [bj9amq6fe7r.b-cdzwmaa.gs0.bnc.salesforce.com](#) to me  8:09 PM (1 minute ago)   

Hi Alok Sinfal,

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

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

Thanks,  
Automation Champion