

**SALESFORCE DEVELOPER (NAAN MUDHALVAN)**

**ASSIGNMENT 1**

**NAME: TEAJASHREE R**

**REG NO: 611220205042**

**NM ID: au611220205042**

**BRANCH: B.TECH IT – IV YEAR**

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

### Solution:

#### Step 1: Create Custom Objects

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

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

- Header:** Search bar with "Search Setup", a gear icon, and a user profile icon.
- Breadcrumbs:** Setup > Home > Object Manager.
- Page Title:** New Custom Object
- Section: Custom Object Definition Edit**
  - Custom Object Information:** Singular Label: college, Plural Label: colleges, Starts with vowel sound:
  - Object Name:** Object Name: college, Example: Account
  - Description:** A large text input field.
  - Context-Sensitive Help Setting:** Open the standard Salesforce.com Help & Training window (radio button selected).
  - Content Name:** Noname
- Section: Enter Record Name Label and Format**
  - The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.
  - Record Name: college Name, Example: Account Name
  - Data Type: Text
- Section: Optional Features**
  - Allow Reports, Allow Activities, Track Field History, Allow in Chatter Groups, Enable Licensing (checkboxes)
- Section: Object Classification**
  - When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more](#).
  - Allow Sharing, Allow Bulk API Access, Allow Streaming API Access (checkboxes)
- Section: Deployment Status**
  - In Development (radio button selected), Deployed
- Section: Search Status**
  - When this setting is enabled, your users can find records of this object type when they search. [Learn more](#).
  - Allow Search (checkbox)
- Section: Object Creation Options (Available only when custom object is first created)**
  - Add Notes and Attachments related list to default page layout, Launch New Custom Tab Wizard after saving this custom object (checkboxes)
- Buttons:** Save, Save & New, Cancel.

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

The screenshot shows the Salesforce Object Manager interface. At the top, there is a navigation bar with 'Setup', 'Home', and 'Object Manager'. Below the navigation bar, the title 'Object Manager' is displayed. The main content area is titled 'New Custom Object'. The 'Custom Object Definition Edit' section contains fields for 'Label' (set to 'department') and 'Plural Label' (set to 'departments'). A note indicates that the singular and plural labels are used in tabs, page layouts, and reports. The 'Object Name' field is also set to 'department'. There is a 'Description' field which is currently empty. Under 'Context-Sensitive Help Setting', the option 'Open the standard Salesforce.com Help & Training window' is selected. The 'Content Name' dropdown is set to 'None'. The 'Enter Record Name Label and Format' section includes a note about record names appearing in various lists. The 'Record Name' field is set to 'Department Name' and the 'Example' field is 'Account Name'. The 'Data Type' is set to 'Text'. The 'Optional Features' section includes checkboxes for 'Allow Reports', 'Allow Activities', 'Allow Field History', 'Allow in Chatter Groups', and 'Enable Licensing'. The 'Object Classification' section notes that these settings enable the object to be classified as an Enterprise Application object. The 'Deployment Status' section shows 'Deployed' is selected. The 'Search Status' section notes that users can find records of this object type when they search. The 'Object Creation Options' section allows adding notes and attachments or launching the New Custom Tab Wizard. At the bottom of the form are 'Save', 'Save & New', and 'Cancel' buttons.

## Step 2: Create a Master-Detail Relationship

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

1. Go to Setup > Object Manager.
2. Click on "College\_c" to open its settings.
3. In the left sidebar, click on "Fields & Relationships."
4. Click the "New" button to create a new custom field.
5. Choose "Master-Detail Relationship" as the data type.
6. Enter a label for the relationship, e.g., "Department \_\_c."
7. Choose "Department\_\_c" as the related object.
8. Configure other settings as needed and click "Next."
9. Specify the field-level security and add it to relevant page layouts.
10. Click "Next" and "Save" to create the relationship.

Cloud icon

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER CDepartment

Details Fields & Relationships

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

New Custom Field Step 1. Choose the field type

Step 1 of 6

Help for this Page

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 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.

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 field type that connects between this object (the child, or "detail") and another object (the parent, or "master") where:

- The master field is calculated 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.

Formula

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

Next Cancel

Cloud icon

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER CDepartment

Details Fields & Relationships

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

New Relationship Step 3. Enter the label and name for the lookup field

Step 3 of 6

Help for this Page

Field Label college

Field Name college

Description

Help Text

Child Relationship Name CDepartments

Sharing Setting Select the minimum access level required on the Master record to create, edit, or delete related Detail records:  
 Read Only Allows users with at least Read access to the Master record to create, edit, or delete related Detail records.  
 Read/Write Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.

Allow reparenting  Child records can be reparented to other parent records after they are created.

Auto add to custom report type  Add this field to existing custom report types that contain this entity

Lookup Filter

Previous Next Cancel

The screenshot shows the Salesforce Setup interface for creating a new relationship. The left sidebar lists various setup options under 'Fields & Relationships'. The main area is titled 'CDepartment New Relationship' and 'Step 2. Choose the related object'. A dropdown menu shows 'Related To college'. Navigation buttons at the bottom include 'Previous', 'Next', and 'Cancel'.

The screenshot shows the Salesforce Setup interface for the CDepartment object. The left sidebar lists various setup options. The main area is titled 'CDepartment Details'. It shows fields like 'Description' (empty), 'API Name' (CDepartment\_\_c), 'Custom' (selected), 'Singular Label' (CDdepartment), and 'Plural Label' (CDDepartments). Other settings include 'Enable Reports', 'Track Activities', 'Track Field History', 'Deployment Status' (Deployed), 'Help Settings', and 'Standard salesforce.com Help Window'. Action buttons 'Edit' and 'Delete' are at the top right.

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

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

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

Setup > OBJECT MANAGER college

**New Custom Field**

**Step 1. Choose the field type**

Specify the type of information that the custom field will contain.

**Data Type**

None Selected

Auto Number

Formula

Roll-Up Summary

Lookup Relationship

Master-Detail Relationship

External Lookup Relationship

Boolean

Select one of the data types below.

A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

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.

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.

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.

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.

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

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

Help for this Page

Step 1

Next Cancel

Setup > OBJECT MANAGER college

**New Custom Field**

**Step 4. Establish field-level security**

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cloud Kicks Admin	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contact Manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
customer	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Force.com - Admin Subscription User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Help for this Page

Step 4 of 5

Previous Next Cancel

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

**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.**

To create a user in Salesforce, you'll typically need administrator or delegated permissions. Here are the general steps to create a new user:

**Log in to Salesforce:**

- Log in to your Salesforce instance with an account that has administrative privileges.

**Access the User Setup:**

- Click on your profile picture or the user icon in the top-right corner.
- Select "Setup" from the dropdown menu.

**Navigate to User Management:**

- In the left-hand sidebar, under "Administer," click on "Users."

Click on the "New User" button or link to begin creating a new user.

### Fill in User Details:

- Fill in the user's information, such as First Name, Last Name, Email, Username (typically an email address), and Alias (used in reports).
- Assign a Role to the user to determine their access within the role hierarchy.
- Choose a License Type (e.g., Salesforce, Chatter Free, or a specific app license).
- Assign a Profile to the user to determine their permissions and settings.

### Save the User:

- Click the "Save" button to create the user.

### Assign a Password:

- After saving the user, you'll be prompted to assign a temporary password.
- Communicate this temporary password to the user, who will need to change it upon their first login.

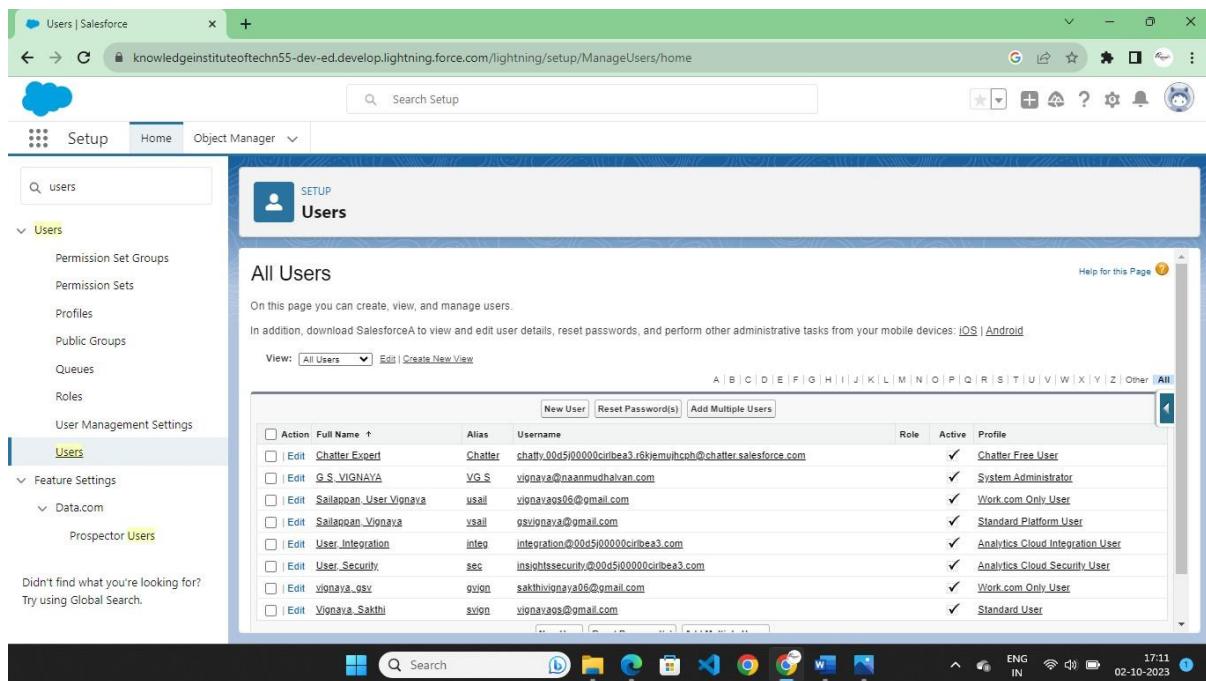
### Verify User Creation:

- Log out of your administrator account and log in as the newly created user to ensure they have the expected access and permissions.

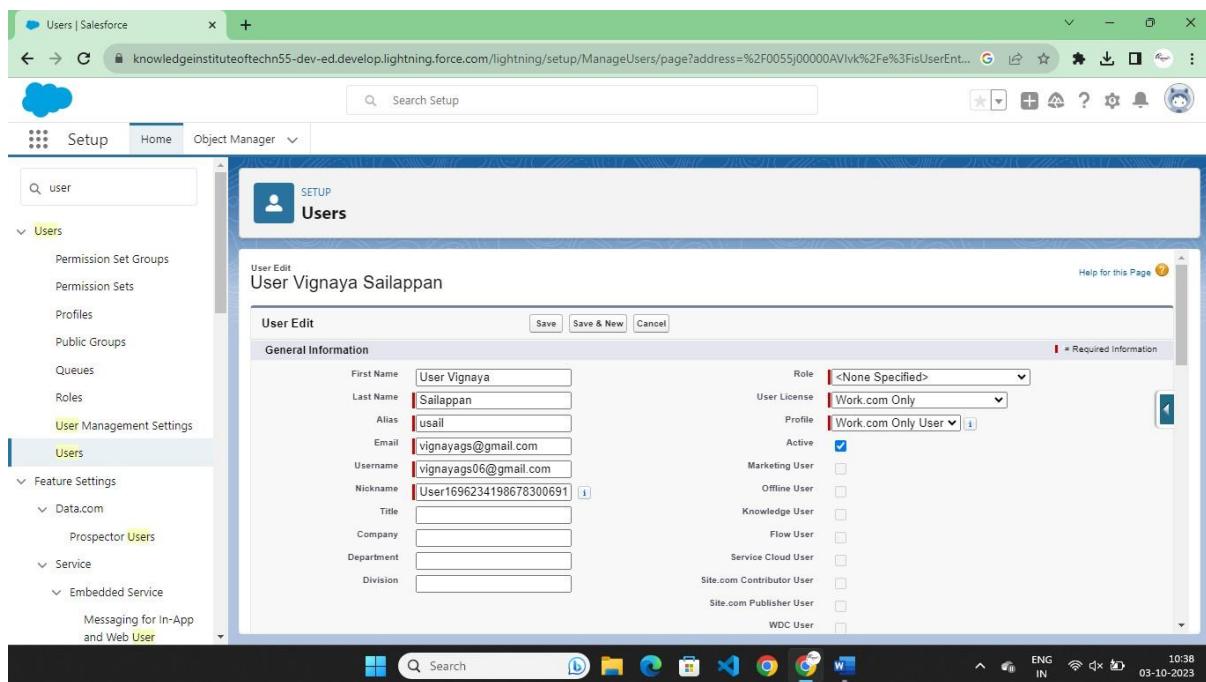
### Profile Creation:

The screenshot shows the Salesforce Setup interface for managing Profiles. The top navigation bar includes 'Profiles | Salesforce', a search bar, and various setup icons. The main content area is titled 'Profiles' and displays a table of existing profiles. The columns are 'Action', 'Profile Name', 'User License', and 'Custom'. The table lists profiles like 'Customer Community User', 'Customer Portal Manager Custom', 'Customer Portal Manager Standard', 'Demo Standard User Profile', 'Employee Profile', 'External Apps Login User', 'External Identity User', 'Force.com - App Subscription User', 'Force.com - Free User', and 'Gold Partner'. The 'User License' column indicates licenses such as Customer Community, Customer Portal Manager, Standard, Salesforce, etc. The 'Custom' column has checkboxes, some of which are checked (e.g., for 'Salesforce' and 'Employee Profile'). At the bottom of the table, there are pagination controls for '1-25 of 42' and '0 Selected'.

## User Creation:



The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. On the left, a sidebar lists various setup categories like Permission Set Groups, Profiles, and Roles. The main area displays a table titled 'All Users' with columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The table lists several users, including 'Chatter Expert', 'G S VIGNAYA', 'Sailappan\_Vignava', 'User\_Integration', 'User\_Security', 'vignayav', and 'Vignaya\_Sakthi'. Each user row has edit and delete options.



The screenshot shows the 'User Edit' screen for 'User Vignaya Sailappan'. The 'General Information' section contains fields for First Name ('User Vignaya'), Last Name ('Sailappan'), Alias ('usail'), Email ('vignayags@gmail.com'), Username ('vignayags06@gmail.com'), and Nickname ('User1696234198678300691'). The 'Role' dropdown is set to '<None Specified>'. Other settings include 'Work.com Only' for 'User License' and 'Work.com Only User' for 'Profile'. The 'Active' checkbox is checked. A note at the top right indicates that some fields are required information.

You control record-level access in four ways. They're listed in order of increasing access. You use org-wide defaults to lock down your data to the most restrictive level, and then use the other record-level security tools to grant access to selected users, as required.

Org-wide defaults specify the default level of access users have to each other's records.

Role hierarchies ensure managers have access to the same records as their subordinates. Each role in the hierarchy represents a level of data access that a user or group of users needs.

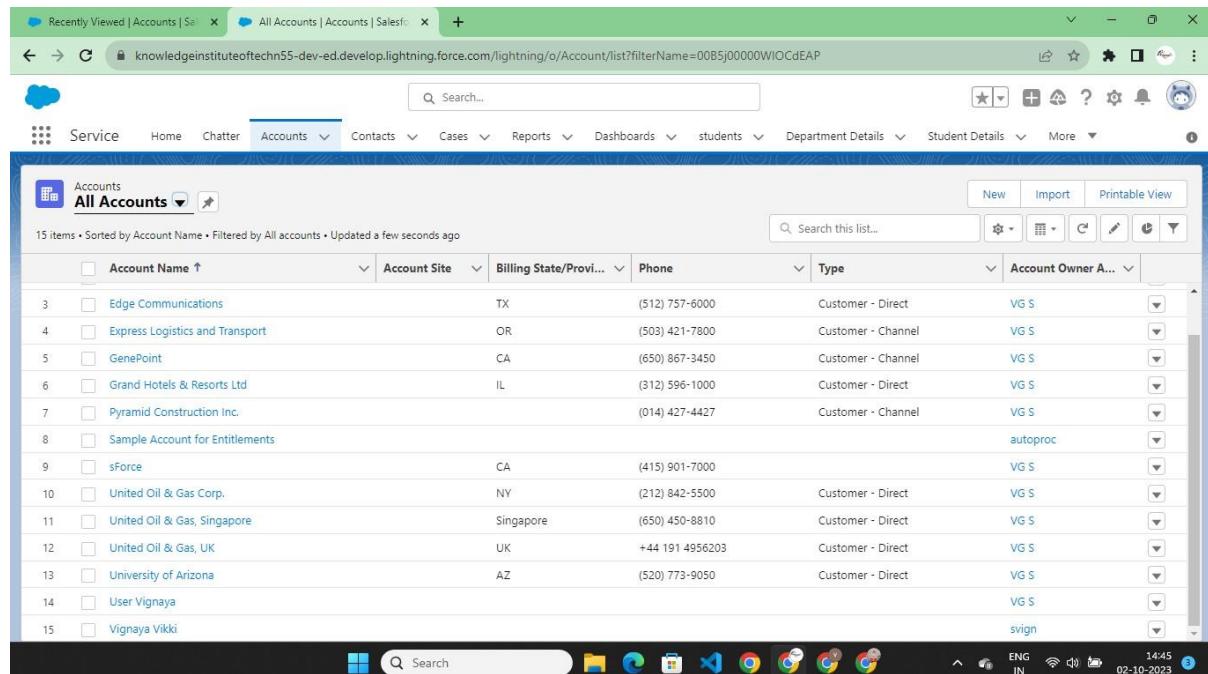
Sharing rules are automatic exceptions to org-wide defaults for particular groups of users, to give them access to records they don't own or can't normally see.

Manual sharing lets record owners give read and edit permissions to users who might not have access to the record any other way.

### In admin:

Before giving the account as private it shows all the user accounts.

After giving the user account as private, one user cannot see the other user account.



The screenshot shows the Salesforce 'All Accounts' page. At the top, there's a navigation bar with links for Service, Home, Chatter, Accounts, Contacts, Cases, Reports, Dashboards, students, Department Details, Student Details, and More. Below the navigation is a search bar and a toolbar with icons for New, Import, and Printable View. The main area displays a table of 15 accounts, each with a checkbox, Account Name, Account Site, Billing State/Prov, Phone, Type, and Account Owner A... column. The accounts listed are: Edge Communications (TX), Express Logistics and Transport (OR), GenePoint (CA), Grand Hotels & Resorts Ltd (IL), Pyramid Construction Inc. (014) 427-4427, Sample Account for Entitlements, sForce (CA), United Oil & Gas Corp. (NY), United Oil & Gas, Singapore (Singapore), United Oil & Gas, UK (UK), University of Arizona (AZ), User Vignaya, and Vignaya Vikki. The table has sorting and filtering options at the top. The bottom of the screen shows the Windows taskbar with various pinned icons and the date/time (02-10-2023, 14:45).

	Account Name	Account Site	Billing State/Prov...	Phone	Type	Account Owner A...
3	Edge Communications	TX	(512) 757-6000	Customer - Direct	VG S	
4	Express Logistics and Transport	OR	(503) 421-7800	Customer - Channel	VG S	
5	GenePoint	CA	(650) 867-3450	Customer - Channel	VG S	
6	Grand Hotels & Resorts Ltd	IL	(312) 596-1000	Customer - Direct	VG S	
7	Pyramid Construction Inc.		(014) 427-4427	Customer - Channel	VG S	
8	Sample Account for Entitlements				autproc	
9	sForce	CA	(415) 901-7000		VG S	
10	United Oil & Gas Corp.	NY	(212) 842-5500	Customer - Direct	VG S	
11	United Oil & Gas, Singapore	Singapore	(650) 450-8810	Customer - Direct	VG S	
12	United Oil & Gas, UK	UK	+44 191 4956203	Customer - Direct	VG S	
13	University of Arizona	AZ	(520) 773-9050	Customer - Direct	VG S	
14	User Vignaya				VG S	
15	Vignaya Vikki				svign	

The screenshot shows the 'Sharing Settings' page in the Salesforce Setup. The left sidebar includes links for 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, Data, Email), and Platform Tools. The main content area displays the 'Default Sharing Settings' table under 'Organization-Wide Defaults'. The table has columns for Object, Default Internal Access, Default External Access, and Grant Access Using Hierarchies. Rows include Lead, Account and Contract, Contact, Order, Asset, Opportunity, Case, Campaign, Campaign Member, User, Activity, Calendar, Price Book, and Profit.

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	✓
Account and Contract	Private	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Order	Controlled by Parent	Controlled by Parent	✓
Asset	Controlled by Parent	Controlled by Parent	✓
Opportunity	Private	Private	✓
Case	Private	Private	✓
Campaign	Public Full Access	Private	✓
Campaign Member	Controlled by Campaign	Controlled by Campaign	✓
User	Public Read Only	Private	✓
Activity	Private	Private	✓
Calendar	Hide Details and Add Events	Hide Details and Add Events	✓
Price Book	Use	Use	✓
Profit	Public Read/Write	Public Read/Write	✓

The screenshot shows the 'All Accounts' page in the Salesforce interface. The top navigation bar includes Service, Home, Chatter, Accounts, Contacts, Cases, Reports, and Dashboards. The main content area displays a table titled 'All Accounts' with a single row for 'TEAJASHREE'. The table columns are Account Name, Account Site, Billing State/Province, Phone, Type, and Account Owner Alias. The status bar at the bottom indicates ENG IN, 13:50, and 02-10-2023.

Account Name	Account Site	Billing State/Province	Phone	Type	Account Owner Alias
TEAJASHREE					

Role hierarchies ensure managers have access to the same records as their subordinates. Each role in the hierarchy represents a level of data access that a user or group of users needs.

Recently Viewed | Accounts | Sales | Roles | Salesforce | Home | Salesforce

knowledgeinstituteoftechn55-dev-ed.develop.lightning.force.com/lightning/setup/Roles/page?address=%2Fui%2Fsetup%2Fuser%2FRoleViewPage%3Fsetupid%3D...

Setup Home Object Manager

roles

Users Roles Feature Settings Sales Service

Contact Roles on Contracts Contact Roles on Opportunities Case Teams Case Team Roles Contact Roles on Cases

Creating the Role Hierarchy

Your Organization's Role Hierarchy

Help for this Page Show in tree view

Knowledge Institute of Technology

- CEO
- CFO
- COO
- SVP, Customer Service & Support
  - Customer Support, International
  - Customer Support, North America
- Installation & Repair Services

Add Role

13:53 02-10-2023

Roles | Salesforce

knowledgeinstituteoftechn55-dev-ed.develop.lightning.force.com/lightning/setup/Roles/page?address=%2Fsetup%2Fuser%2Frole2users.jsp%3Fid%3D0...

Setup Home Object Manager

roles

Users Feature Settings Sales Service

Contact Roles on Contracts Contact Roles on Opportunities Case Teams Case Team Roles Contact Roles on Cases

Removing a user from the Selected Users list deletes the role assignment for that user.

Available Users Selected Users for CFO

All Unassigned for: gsv vignaya

Save Cancel

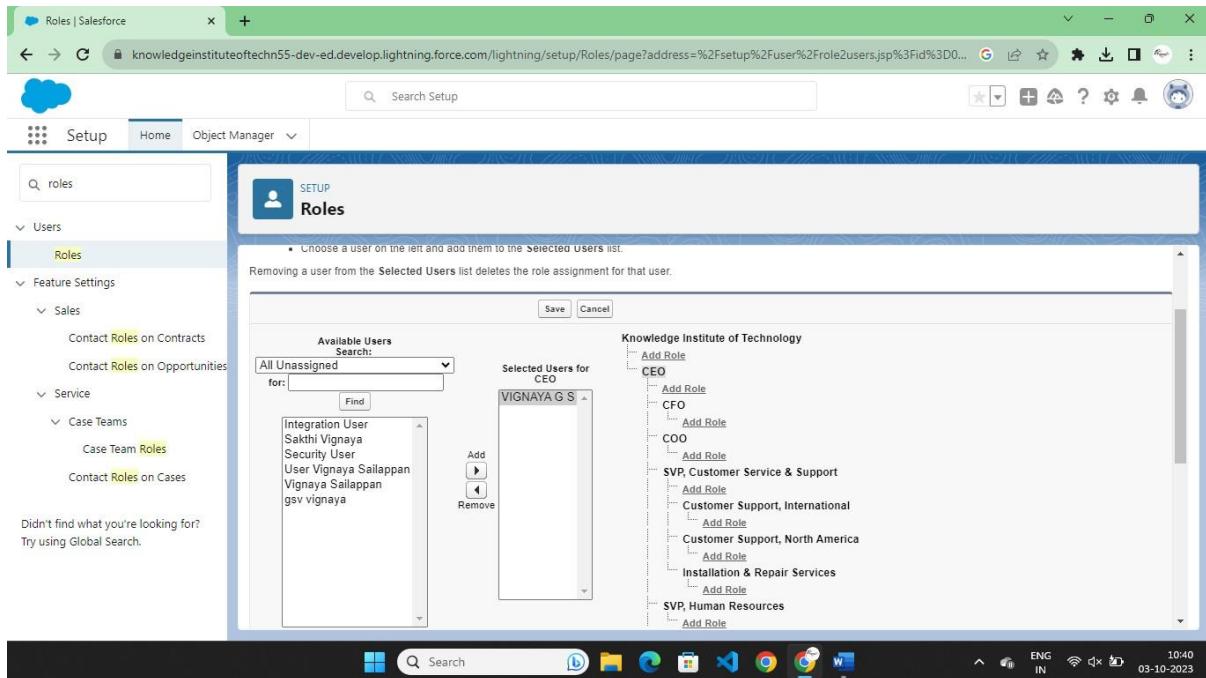
Integration User Sakthi Vignaya Security User User Vignaya Sallappan VIGNAYA G S Vignaya Sallappan

Add Remove

Knowledge Institute of Technology

- CEO
- CFO
- COO
- SVP, Customer Service & Support
  - Customer Support, International
  - Customer Support, North America
- Installation & Repair Services

ENG IN 10:39 03-10-2023



**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.**

**Users**

All Users

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

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

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	<a href="#">Edit</a> <a href="#">A_Sunil</a>	sa	2k21cse176@kiot.ac.in	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Manager
<input type="checkbox"/>	<a href="#">Edit</a> <a href="#">Chatter_Expert</a>	Chatter	chatty_00d500000cismean.ed0fzlkbsrf@chatter.salesforce.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	<a href="#">Edit</a> <a href="#">P_Sanjay</a>	SP	2k22cse171@kiot.ac.in	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Manager
<input type="checkbox"/>	<a href="#">Edit</a> <a href="#">S_Chandru</a>	CS	au611220104303@naanmudhalvan.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	<a href="#">Edit</a> <a href="#">User_Integration</a>	integ	integration@00d500000cismean.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	<a href="#">Edit</a> <a href="#">User_Security</a>	sec	insightssecurity@00d500000cismean.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Security User

**Profiles**

All Profiles

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

The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected. The main content area displays the 'Clone Profile' page. It prompts the user to enter the name of the new profile and specifies that an existing profile must be selected to clone from. The 'Existing Profile' dropdown is set to 'Standard Platform User'. The 'User License' is listed as 'Salesforce Platform' and the 'Profile Name' is 'Manager'. A note indicates that the 'Profile Name' field is required information. Buttons for 'Save' and 'Cancel' are at the bottom.

The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected. The main content area displays the 'Profile Detail' page for the profile named 'chan'. It provides a summary of the profile's permissions and page layouts. The profile is a 'Custom Profile' assigned to the user 'Chandru S'. The 'Profile Detail' section includes fields for Name (chan), User License (Salesforce Platform), Description, and Created By (Chandru S). The 'Page Layouts' section lists various standard object layouts such as Global Layout, Email Application, Home Page Layout, Account, Alternative Payment Method, Appointment Invitation, and Asset, along with their respective assignments and operating hours.

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

Basic Access Data Administration

	Read	Create	Edit	Delete	View All	Modify All
Brokers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Childs	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Parents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Properties	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

User passwords expire in: 90 days

Enforce password history: 3 passwords remembered

Minimum password length: 8

Password complexity requirement: Must include alpha and numeric characters

Password question requirement: Cannot contain password

Maximum invalid login attempts: 10

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

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 chan Help for this Page

Set the permissions and page layouts for this profile.

Profile Edit

Name: chan

User License: Salesforce Platform

Description:

Custom Profile:

Custom App Settings

	Visible	Default		Visible	Default	
Analytics Studio (standard__Insights)	<input type="checkbox"/>	<input checked="" type="radio"/>		Parent Details (Chandru_s)	<input checked="" type="checkbox"/>	<input type="radio"/>
App Launcher (standard__AppLauncher)	<input type="checkbox"/>	<input checked="" type="radio"/>		Platform (standard__Platform)	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>
Dreamhouse (Dreamhouse)	<input type="checkbox"/>	<input checked="" type="radio"/>		WDC (standard__Work)	<input type="checkbox"/>	<input type="radio"/>

Service Provider Access

Tab Settings

Overwrite users' personal tab customizations:

Standard Tab Settings

Home Default On Learning Default On

Screenshot of the Salesforce Lightning User Management interface.

The page title is "Users | Salesforce". The URL is <https://aws-36e-dev-ed.lightning.force.com/lightning/setup/ManageUsers/home>.

The left sidebar shows the navigation menu:

- Lightning Usage
- 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

The main content area displays the "All Users" list:

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	A_Sunil	sa	2k21cse176@kiot.ac.in	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Manager
<input type="checkbox"/>	Chatter Expert	Chatter	chatty_00d5j00000cismgean.eodfzlkbsrf@chatter.salesforce.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	P_Sanjay	SR	2k22cse171@kiot.ac.in	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Bmanager
<input type="checkbox"/>	S_Chandru	CS	au611220104303@naanmudhalvan.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	User_Integration	integ	integration@00d5j00000cismgean.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	User_Security	sec	insightssecurity@00d5j00000cismgean.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Security User

Buttons at the top of the list table: New User, Reset Password(s), Add Multiple Users.

Buttons at the bottom of the list table: 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.

Help for this Page ?

Screenshot of the Salesforce Lightning User Management interface showing the "New User" creation screen.

The page title is "Setup". The URL is [Search Setup](#).

The left sidebar shows the navigation menu:

- Lightning Usage
- 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

The main content area displays the "New User" form:

User Edit

General Information

First Name	Sunil	Role	<None Specified>
Last Name	A	User License	Salesforce Platform
Alias	sa	Profile	chan
Email	2k20cse176@kiot.ac.in	Active	<input checked="" type="checkbox"/>
Username	2k23cse176@kiot.ac.in	Marketing User	<input type="checkbox"/>
Nickname	User1696321490080232961	Offline User	<input type="checkbox"/>
Title		Knowledge User	<input type="checkbox"/>
Company	Male	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 Allocation Limit	Default Limit (300)
		Accessibility Mode (Classic Only)	<input type="checkbox"/>
		High-Contrast Palette on Charts	<input type="checkbox"/>
		Load Lightning Pages While	<input type="checkbox"/>

Buttons at the top of the form: Save, Save & New, Cancel.

Help for this Page ?

Setup Home Object Manager

### Users

User Sunil A

Permission Set Assignments | Permission Set Assignments: Activation Required | Permission Set Group Assignments | Permission Set License Assignments | Personal Groups | Public Group Membership | Queue Membership | Team | Managers in the Role Hierarchy | OAuth Apps | Third-Party Account Links | Installed Mobile Apps | Authentication Settings for External Systems | Login History | User Provisioning Accounts

User Detail

Name	Sunil A	Role	Salesforce Platform
Alias	sa	User License	chan
Email	2k20cse176@kiot.ac.in [Verify]	Marketing User	<input type="checkbox"/>
Username	2k20cse176@kiot.ac.in	Offline User	<input type="checkbox"/>
Nickname	User16963214900802329619	Knowledge User	<input type="checkbox"/>
Title	Male	Flow User	<input type="checkbox"/>
Company		Service Cloud User	<input type="checkbox"/>
Department		Site.com Contributor User	<input type="checkbox"/>
Division		Site.com Publisher User	<input type="checkbox"/>
Address	2/73 Kondaiyamalai p.o. Mettakkaduvalam 637503 Tamil Nadu India	WDC User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Mobile Push Registrations	<a href="#">View</a>
Locale	English (India)	Data.com User Type	<a href="#">i</a>
Language	English	Accessibility Mode (Classic Only)	<input type="checkbox"/> <a href="#">i</a>
Delegated Approver	Manager	Debug Mode	<input type="checkbox"/> <a href="#">i</a>
Receive Approval Request Emails	Only if I am an approver	High-Contrast Palette on Charts	<a href="#">i</a>
Federation ID			

User Profile Help for this Page

Setup Home Object Manager

### Users

User Edit Sunil A

Help for this Page

User Edit

General Information	Role	<None Specified>	
First Name	Sunil	User License	Salesforce Platform
Last Name	A	Profile	chan
Alias	sa	Active	<input checked="" type="checkbox"/>
Email	2k20cse176@kiot.ac.in	Marketing User	<input type="checkbox"/>
Username	2k20cse176@kiot.ac.in	Offline User	<input type="checkbox"/>
Nickname	User16963214900802329619	Knowledge User	<input type="checkbox"/>
Title		Flow User	<input type="checkbox"/>
Company	Male	Service Cloud User	<input type="checkbox"/>
Department		Site.com Contributor User	<input type="checkbox"/>
Division		Site.com Publisher User	<input type="checkbox"/>
		WDC User	<input type="checkbox"/>
		Data.com User Type	<a href="#">-None--</a> <a href="#">i</a>
		Data.com Monthly Addition Limit	300 <a href="#">i</a>
		Accessibility Mode (Classic Only)	<input type="checkbox"/> <a href="#">i</a>
		High-Contrast Palette on Charts	<input type="checkbox"/> <a href="#">i</a>

## 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.

The screenshot shows the Salesforce Setup interface. On the left, the navigation bar includes links like Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, and Administration (with sub-links for Users, Permission Set Groups, and Permission Sets). The main content area is titled "Permission Sets" and shows a permission set named "Permission01". A modal window titled "Edit Properties" is open, displaying fields for Label ("permission01"), API Name ("permission01"), Description, Session Activation Required (unchecked), and Save/Cancel buttons. Below the modal, sections for App Permissions, Apex Class Access, Visualforce Page Access, and External Data Source Access are visible.

This screenshot shows the same Salesforce Setup interface as the first one, but with a different view. The "Object Settings" tab is selected in the "Accounts" section of the "Object Permissions" table. The table has columns for "Permission Name" (Read, Create, Edit, Delete, View All, Modify All) and "Enabled" status. Under "Field Permissions", there is a table for the "Account" object with columns for "Field Name" (Account Name, Account Number, Account Owner, Account Site, Account Source, Active, Annual Revenue) and "Read Access" and "Edit Access" checkboxes. Some checkboxes are checked, such as Read for Account Name and Edit for Account Owner.

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

Object Manager

Search Setup

Clone Delete Edit Properties Manage Assignments

Video Tutorial | Help for this Page

Accounts

Object Permissions

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

Field Permissions

Field Name	Read Access	Edit Access
Account Name	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Account Number	<input type="checkbox"/>	<input type="checkbox"/>
Account Owner	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Account Site	<input type="checkbox"/>	<input type="checkbox"/>
Account Source	<input type="checkbox"/>	<input type="checkbox"/>
Active	<input type="checkbox"/>	<input type="checkbox"/>
Annual Revenue	<input type="checkbox"/>	<input type="checkbox"/>

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

Object Manager

Search Setup

Cancel Next

All Users

2 items selected

Full Name	Role	Profile
Chandru S	System Administrator	
Chatter Expert	Chatter Free User	
Integration User	Analytics Cloud Integration User	
Sanjay P	Bmanager	
Security User	Analytics Cloud Security User	
Sunil A	chan	
Sunil A	chan	

The screenshot shows the Salesforce Setup interface. On the left, the navigation sidebar includes links like Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, and Administration (with sub-links for Users, Permission Set Groups, and Permission Sets). The main content area displays a configuration page for assigning users to a permission set. It has sections for specifying an expiration date (radio buttons for 'No expiration date' or 'Specify the expiration date' with options for 1 Day, 1 Week, 30 Days, 60 Days, or Custom Date), selecting a time zone, and listing 'Selected Users'. Two users, 'Sunil A' and 'Sunil A', are listed with their profile (chan), active status, user license (Salesforce Platform), and expiration date (Never Expires). At the bottom right are 'Back' and 'Assign' buttons.

The screenshot shows the Salesforce Setup interface after the assignment process. The main content area displays a success message: '... > PERMISSION SET ...' followed by '2 assignments were successful.' Below this is a 'permission01' section titled 'Assignment Summary'. It shows a table of assigned users: 'Sunil A' and 'Sunil A', both with the User License 'Salesforce Platform' and Status 'Success'. At the bottom right is a 'Done' button.

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

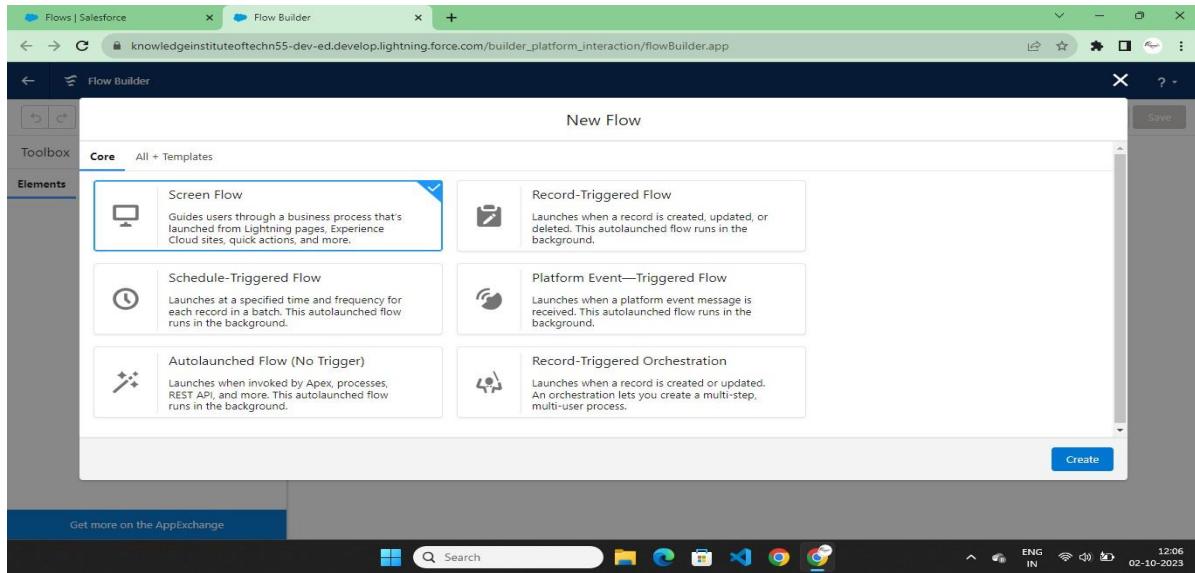
### Step 1: Access Salesforce Setup

1. Log in to your Salesforce account.
2. Click on your profile picture or the gear icon in the upper-right corner.

3. Select "Setup" from the dropdown menu.

## Step 2: Create a Flow

1. In the Setup menu, type "Flows" in the Quick Find box and select "Flows."



## Step 3: Add Screen Elements

1. Drag and drop a "Screen" element onto the canvas. This will be the starting point of your flow.

2. Click on the screen element to configure it.

3. Add text and instructions on this screen to inform users about the survey and what information is required.

4. Drag and drop the appropriate input elements (e.g., text fields, radio buttons, checkboxes) onto the screen for users to input their survey details. You can find these elements in the palette on the left.

5. Configure each input element with the appropriate labels, help text, and validation rules if necessary.

Flows | Salesforce Contact Flow - V1

knowledgeinstituteoftechn55-dev-ed.develop.lightning.force.com/lightning/setup/Flows/home

Setup Home Object Manager

Search Setup

flows

**Flows**

Flow Definitions All Flows

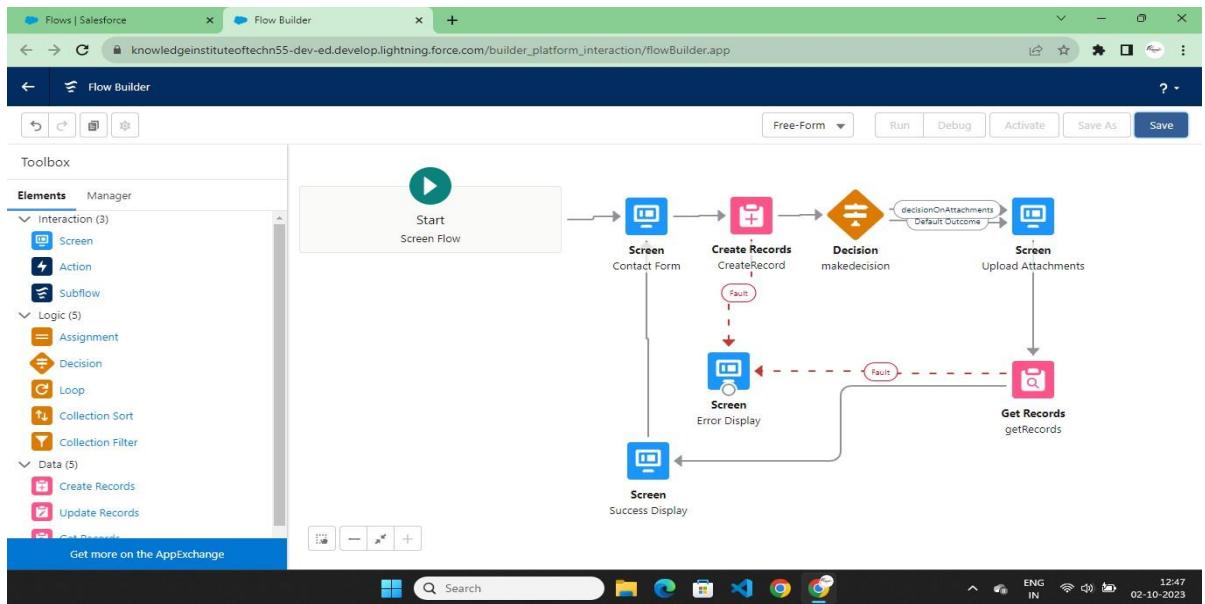
Flow Label	Process Type	Actions	Package State	Created By	Last Modified
CMS: Withdraw Review Request	Screen Flow	✓	Managed-Installed	VIGNAYA G...	02/10/2023, 12:54 pm
Contact Flow	Screen Flow	✓	Unmanaged		
Create a Case	Screen Flow	✓	Managed-Installed		
Create Order Summary Flow	Autolaunched Flow	✓	Managed-Installed		
Create Process Exception Flow	Autolaunched Flow	✓	Managed-Installed		
Create Waitlist	Salesforce Scheduler Flow	✓	Managed-Installed		
Discount Flow	Screen Flow	✓	Managed-Installed		
Even Exchange Flow	Screen Flow	✓	Managed-Installed		
Find Contact Associated with Messaging Se...	Individual-Object Linking Flow	✓	Managed-Installed		
Generate Appointment Invitation	Salesforce Scheduler Flow	✓	Managed-Installed		

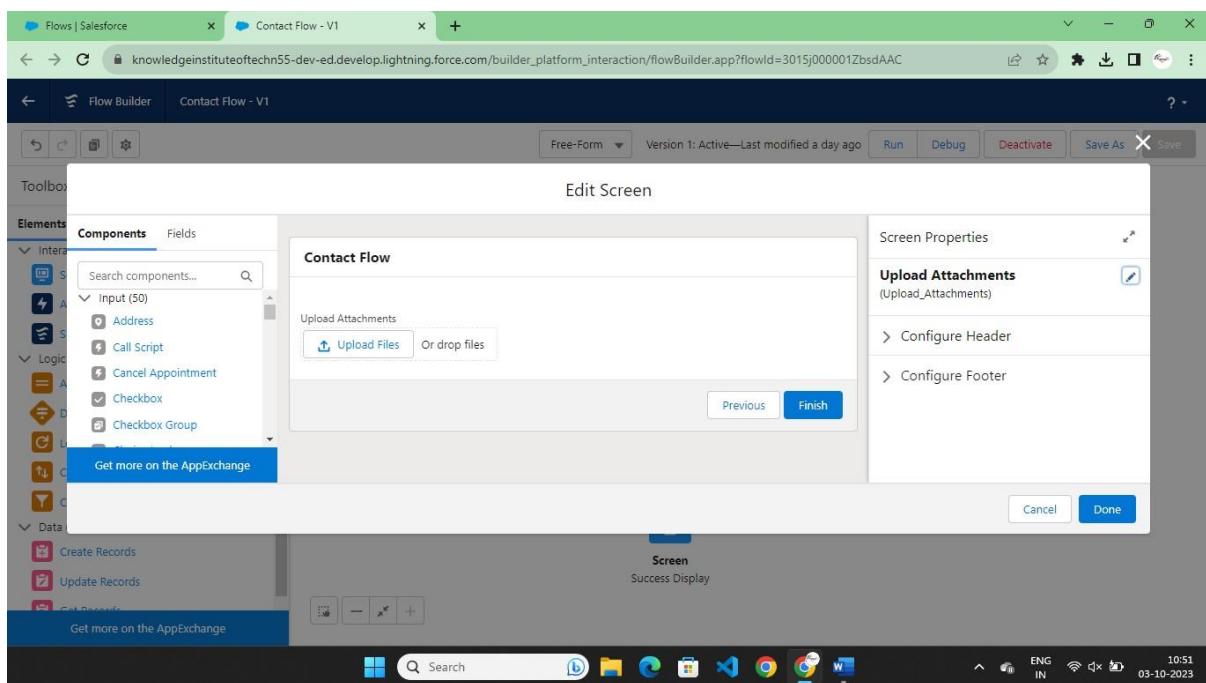
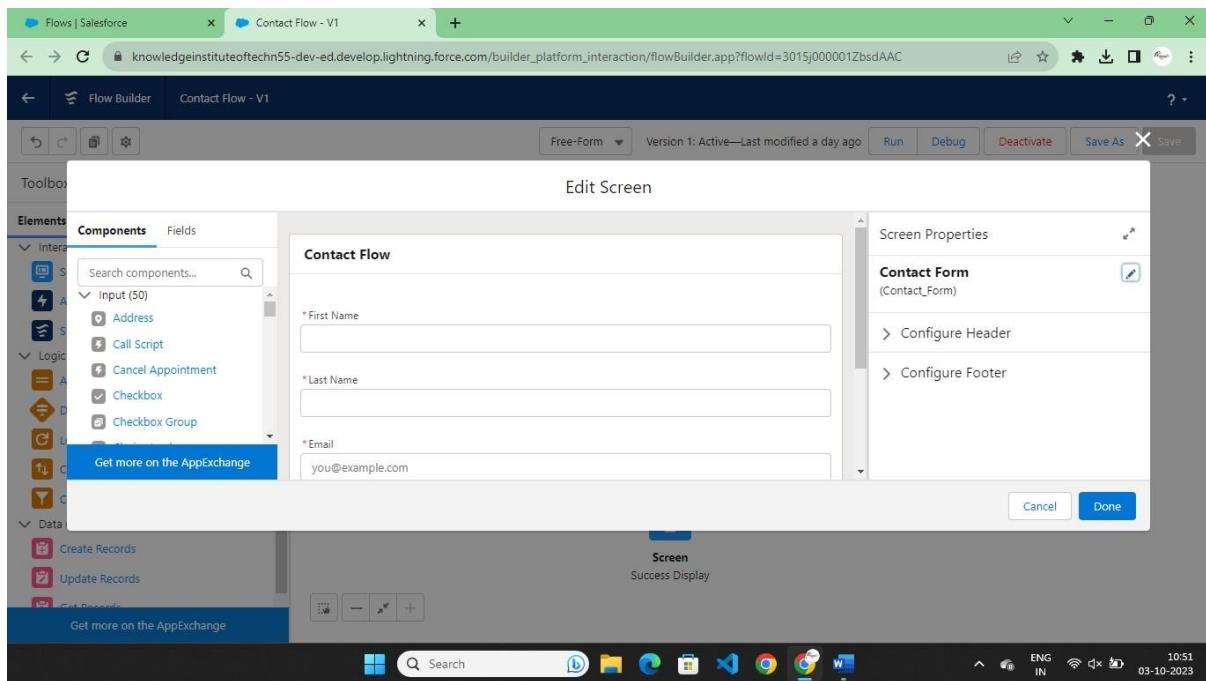
Didnt find what you're looking for? Try using Global Search.

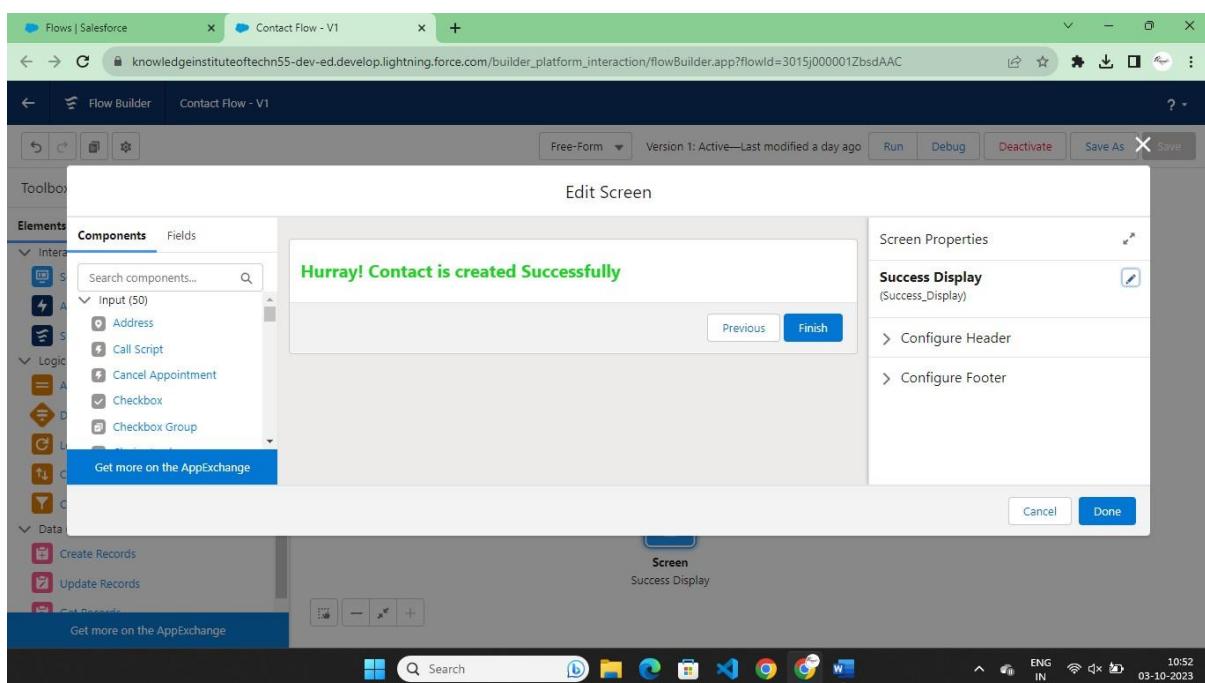
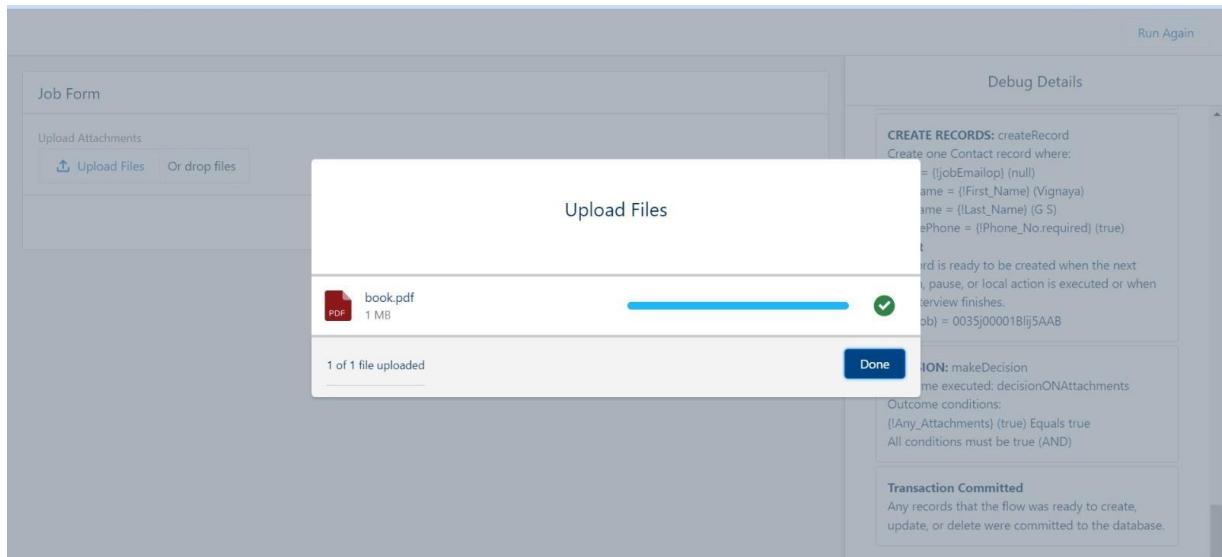
Flows Trigger Explorer New Flow

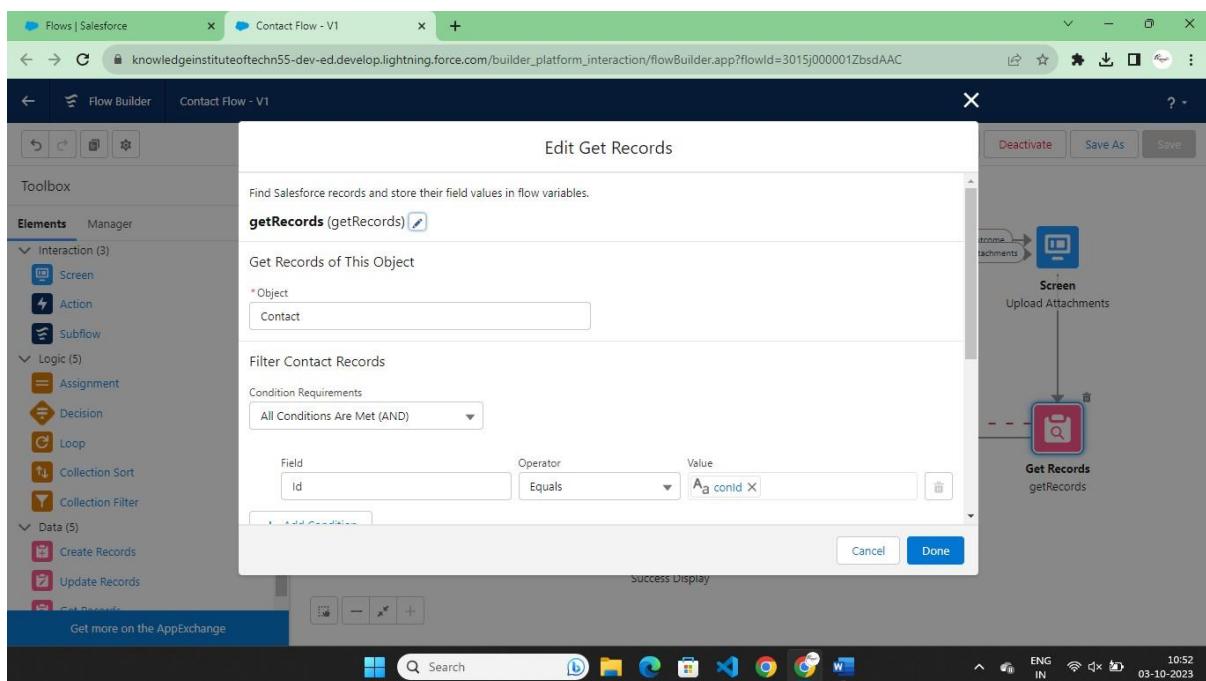
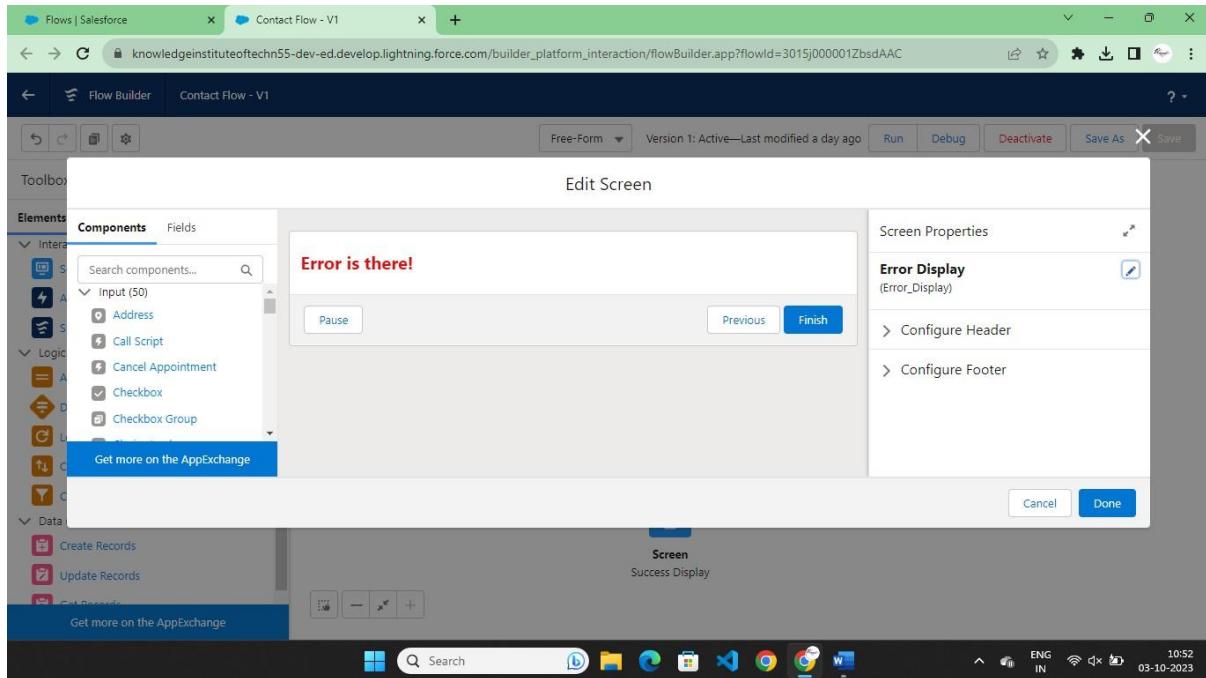
Search

03-10-2023 10:51 ENG IN



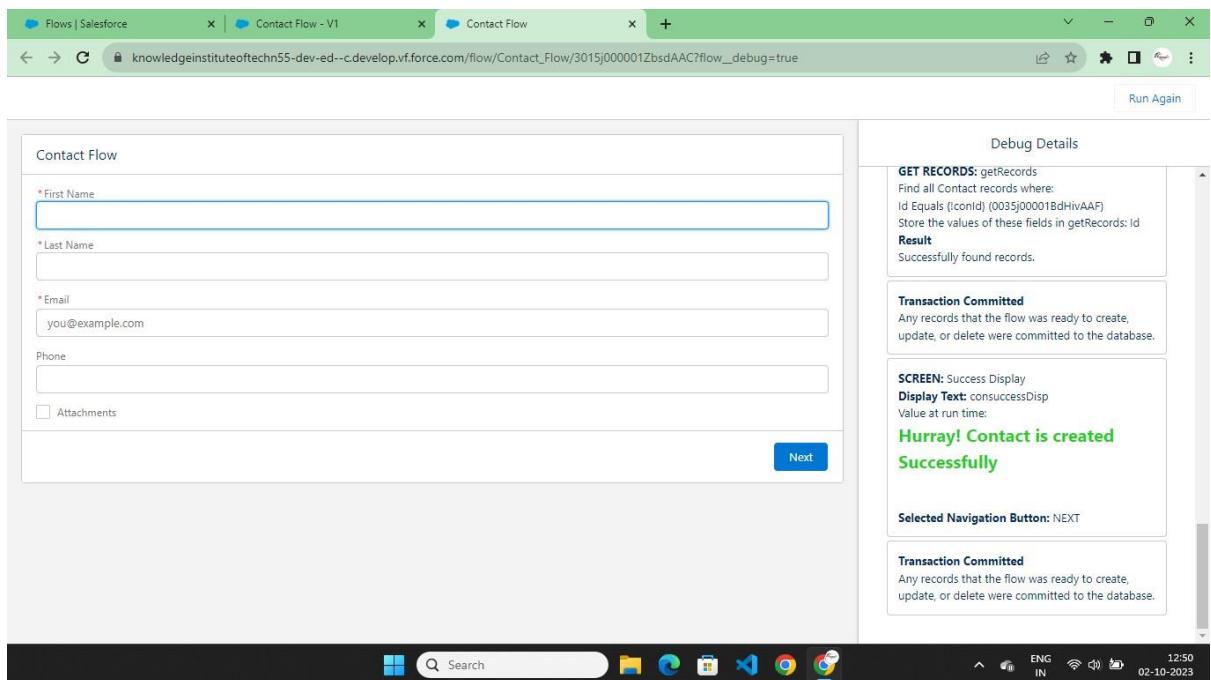
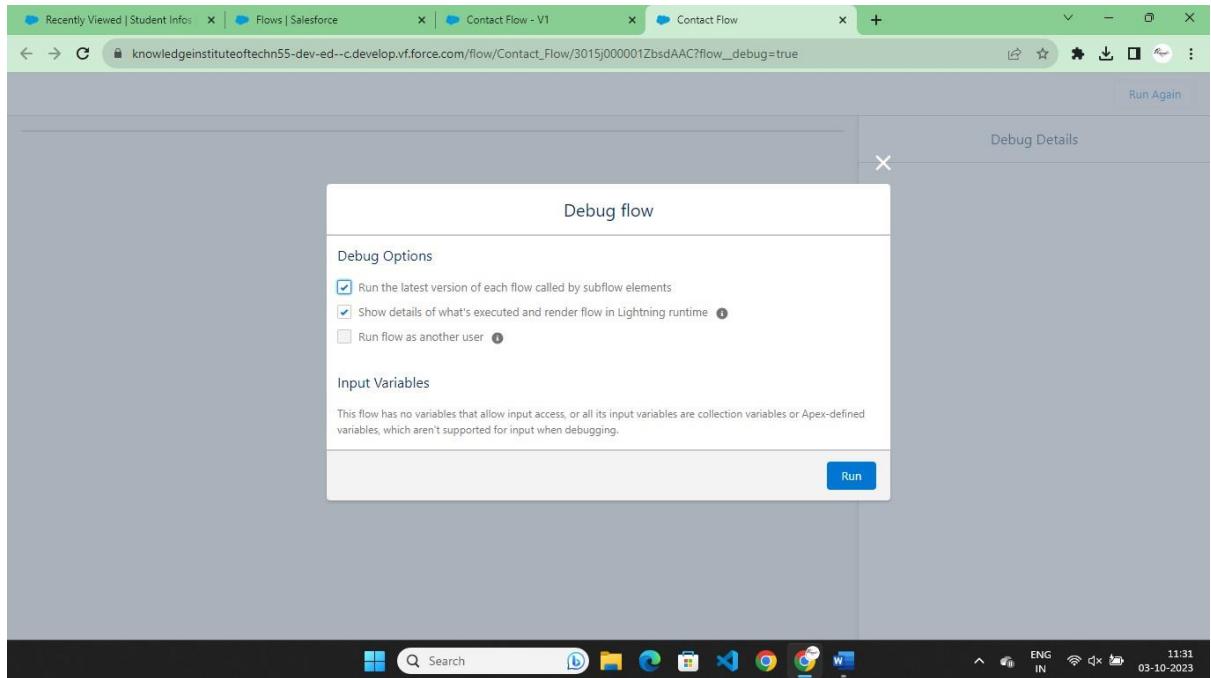


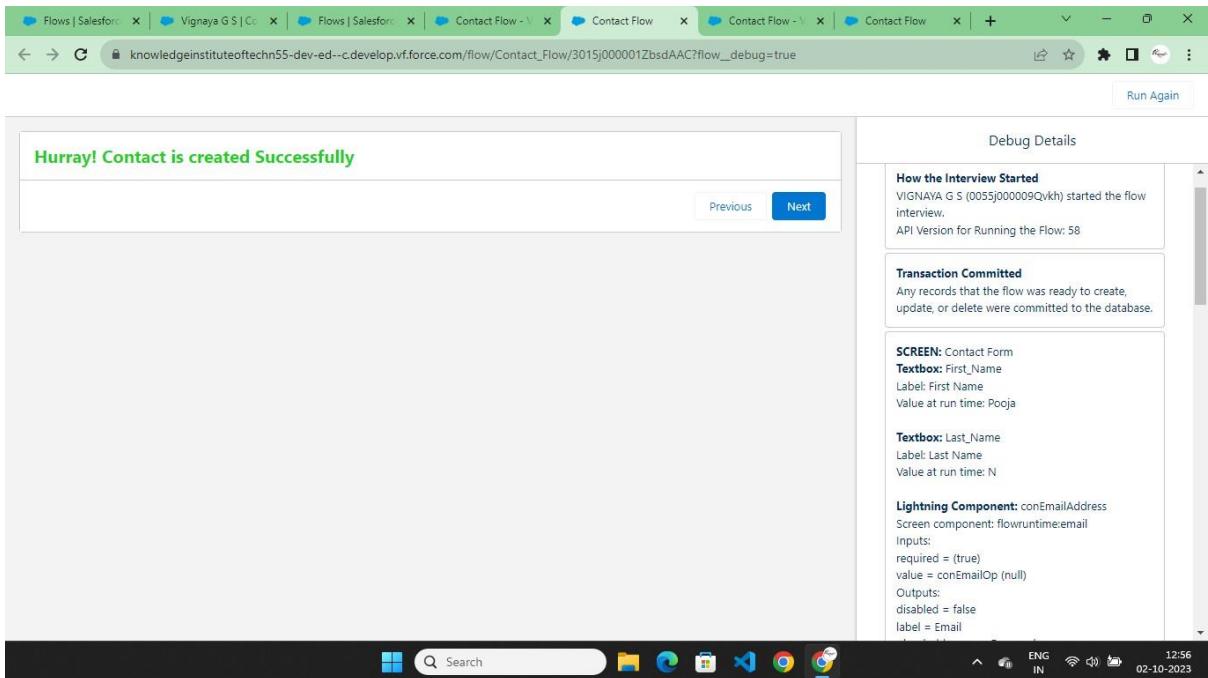




## Step 4: Create Variables

1. If you want to capture and store the survey data, you need to create variables to hold the data. To do this, click on the "Manager" tab in the palette and create variables for each field on the screen. Make sure the variable types match the data types of the corresponding fields.





## Step 7: Create a Finish Screen

Add a final screen where you can thank the user for completing the survey and provide any necessary information or instructions.

## Step 8: Connect the Screens

Connect the screens and elements in the desired order by dragging connectors between them.

## Step 9: Set the Flow Properties

Click on the canvas and go to the Properties tab on the right to set the flow's name, description, and other settings.

## Step 10: Activate the Flow

After designing the flow, click "Save" and then "Activate" to make it available for users.