SALESFORCE DEVELOPER (NAAN MUDHALVAN)

ASSIGNMENT 1

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NM ID: au611220205042

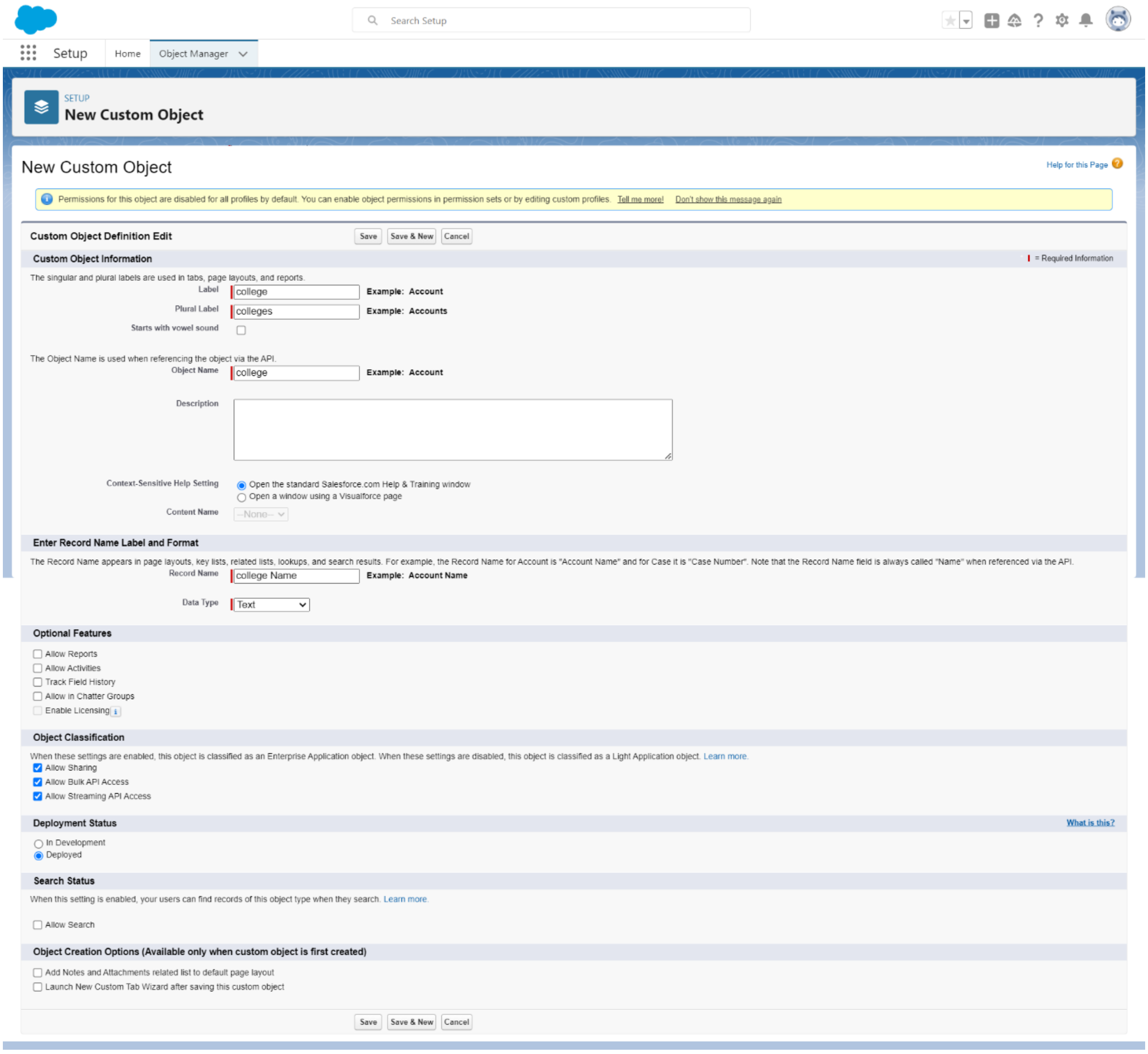
BRANCH: B.TECH IT – IV YEAR

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

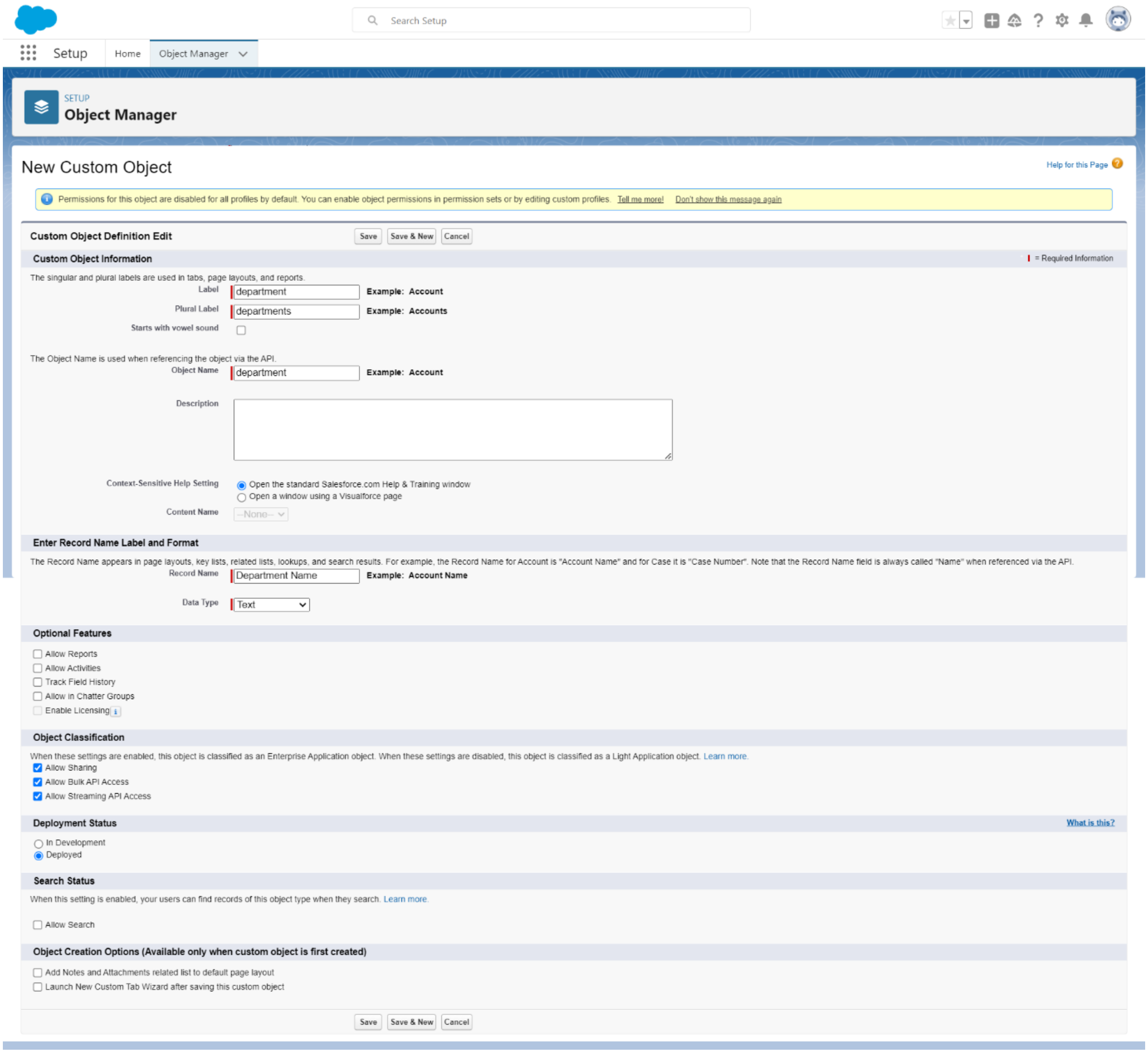
Solution:

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.



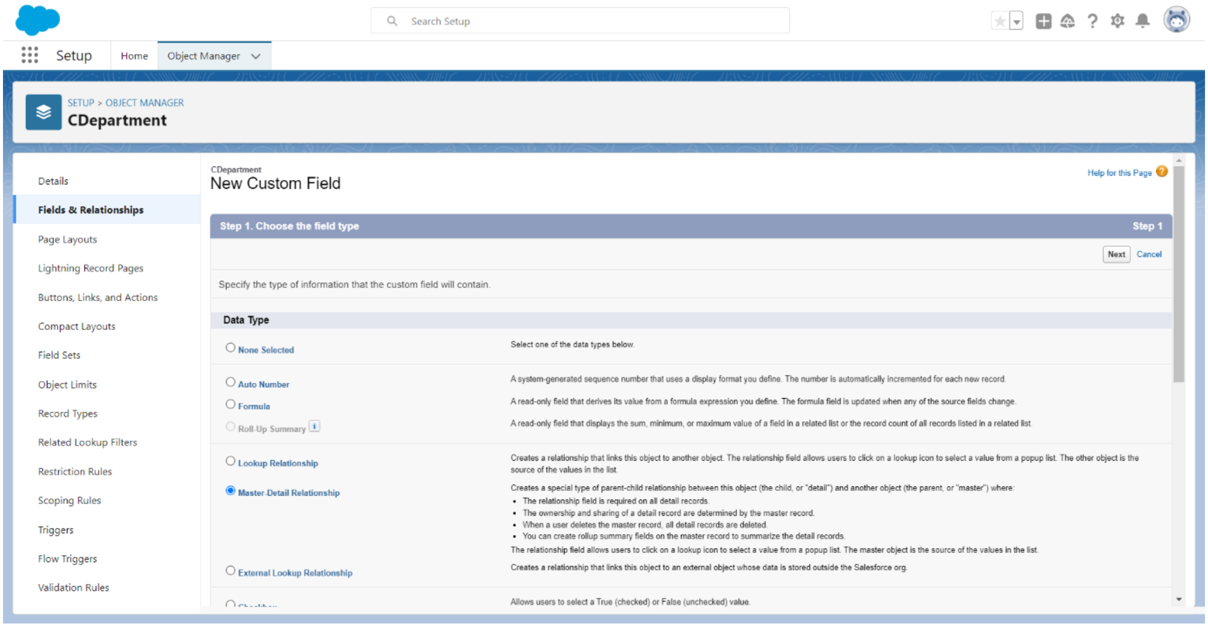
Second custom objects, let's call them "Department_C"

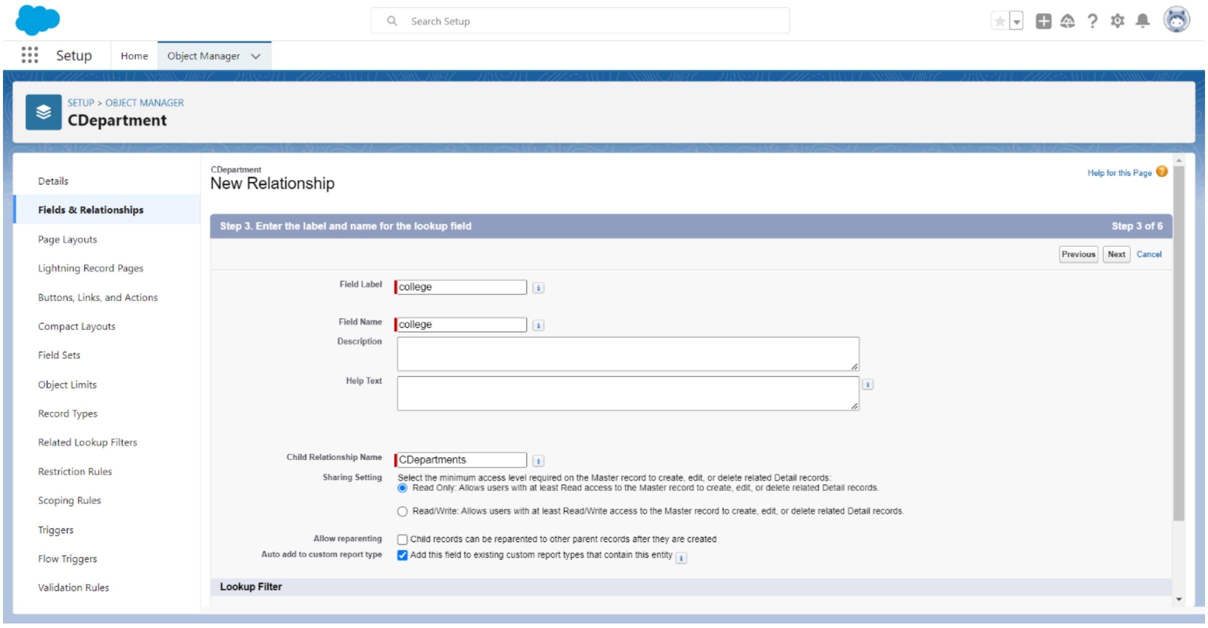


Step 2: Create a Master-Detail Relationship

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.


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
CDepartment
New Custom Field
Help for this Page
Step 1. Choose the field type
Step 1
Next
Cancel
Specify the type of information that the custom field will contain.
Data Type
None Selected
Select one of the data types below.
Auto Number
A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
Formula
A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
Roll-Up Summary
A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
Lookup Relationship
Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
Master-Detail Relationship
Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:
The relationship field is required on all detail records.
The ownership and sharing of a detail record are determined by the master record.
When a user deletes the master record, all detail records are deleted.
You can create rollup summary fields on the master record to summarize the detail records.
The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.
External Lookup Relationship
Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.
Allows users to select a True (checked) or False (unchecked) value.


Search Setup
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SETUP > OBJECT MANAGER
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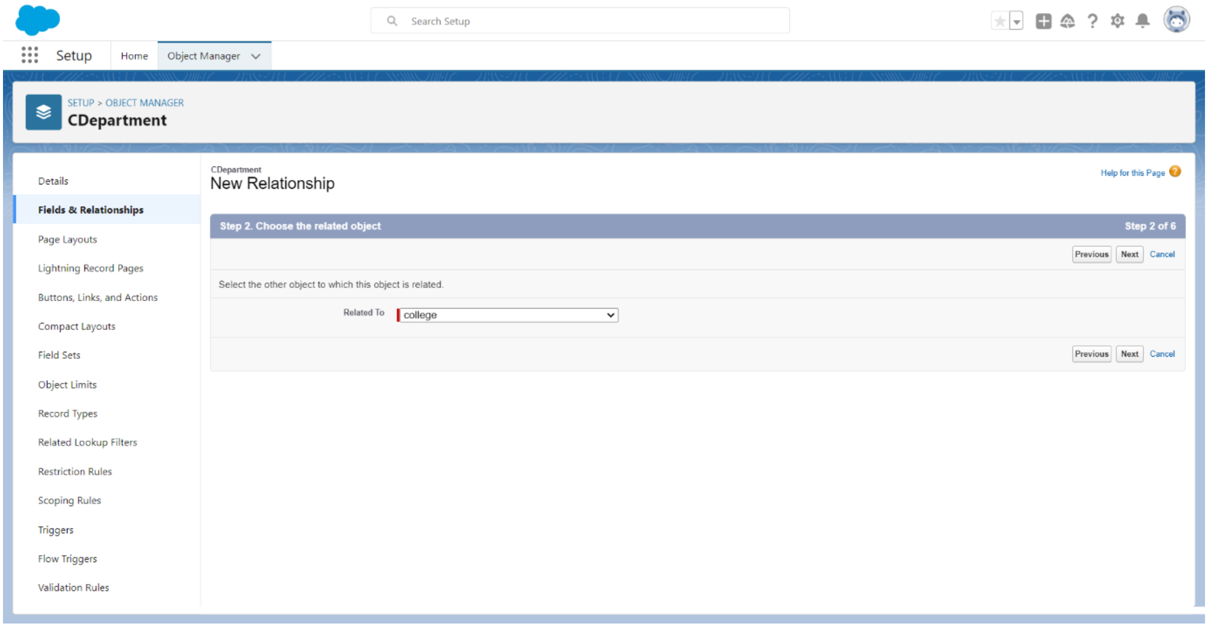
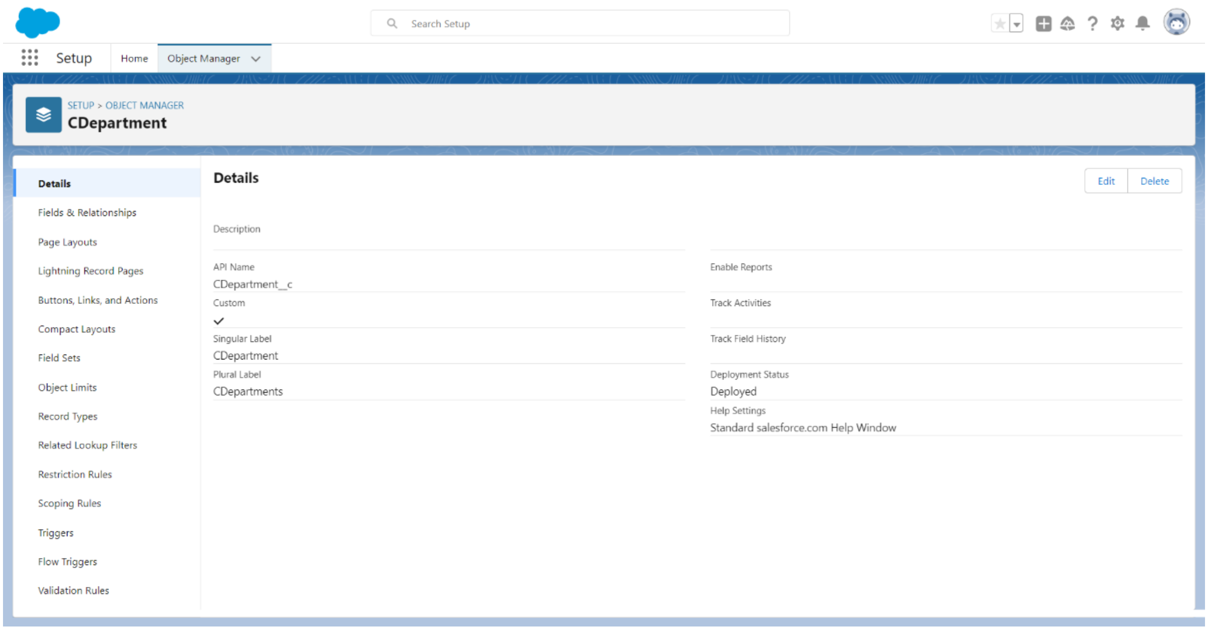
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Triggers
Flow Triggers
Validation Rules
CDepartment
New Relationship
Help for this Page
Step 3. Enter the label and name for the lookup field
Step 3 of 6
Previous
Next
Cancel
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

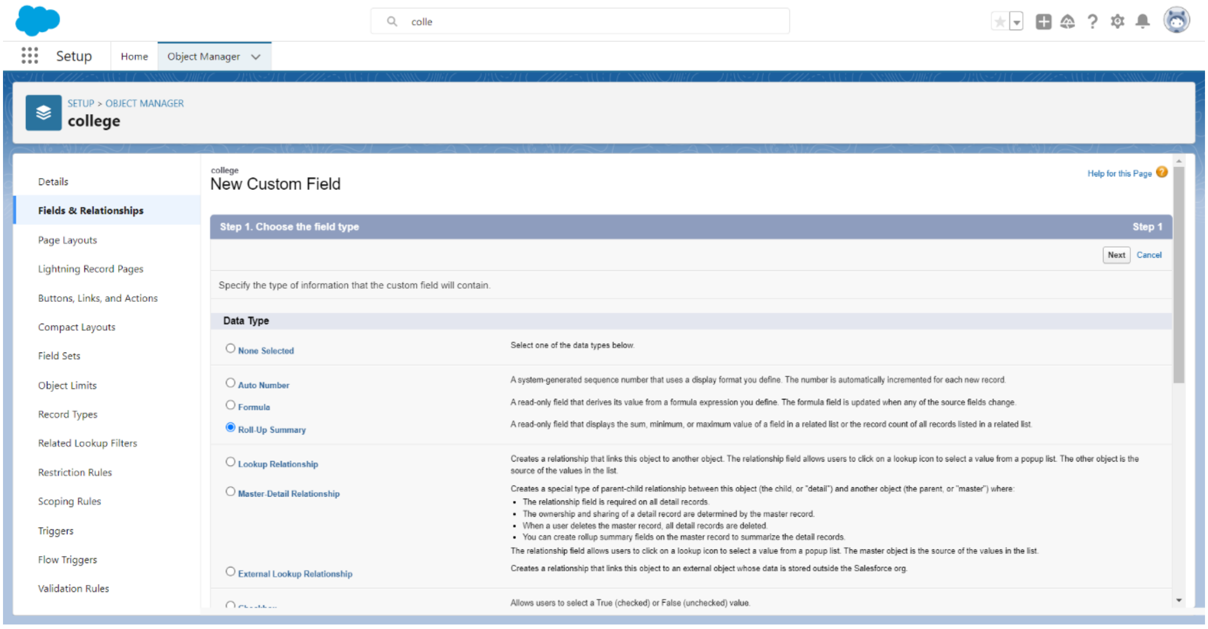




Step 3: Create the Roll-Up Summary Field

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.**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Buttons, Links, and Actions
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Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Triggers
Flow Triggers
Validation Rules
college
New Custom Field
Help for this Page
Step 1. Choose the field type
Step 1
Next
Cancel
Specify the type of information that the custom field will contain.
Data Type
None Selected
Select one of the data types below.
Auto Number
A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
Formula
A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
Roll-Up Summary
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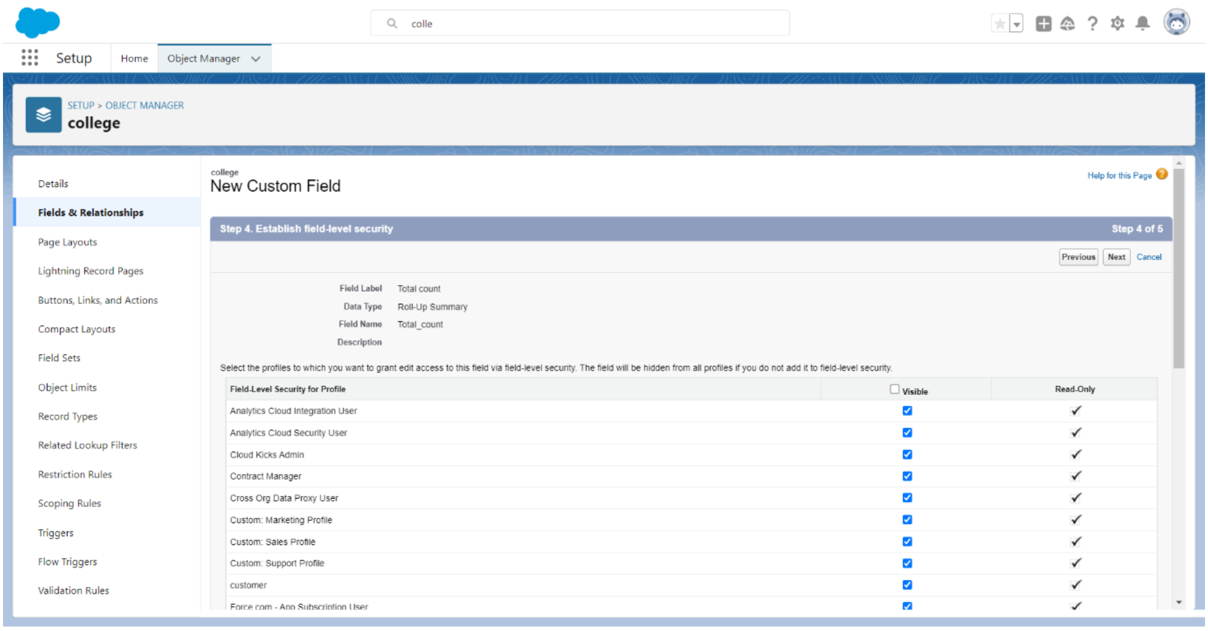
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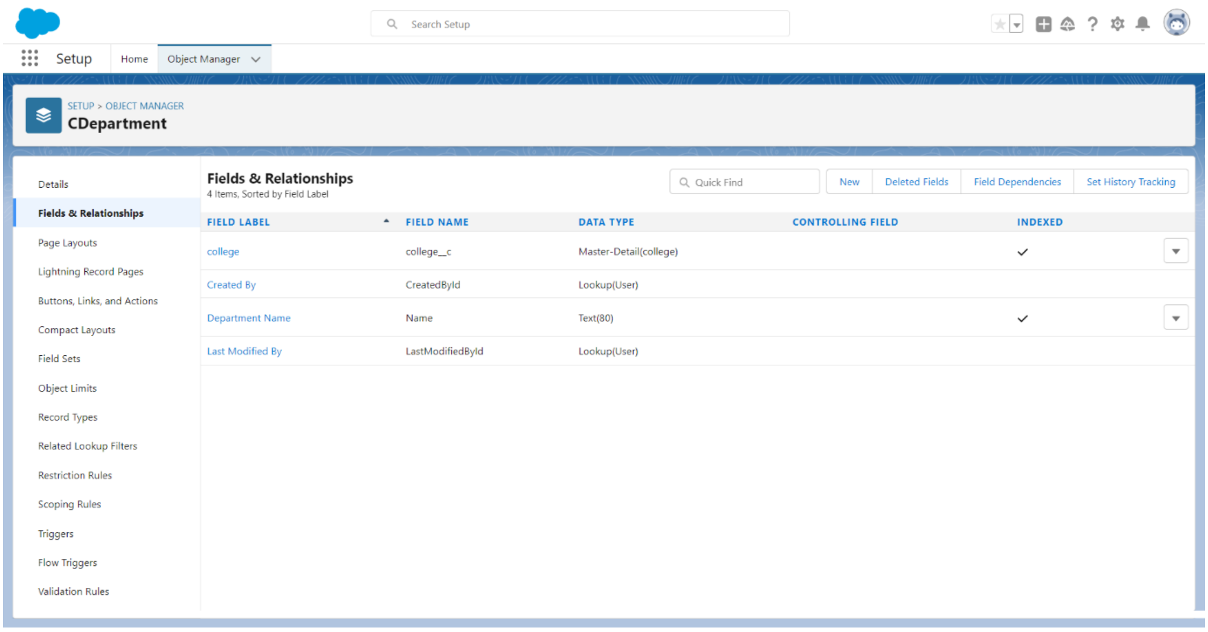
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Triggers
Flow Triggers
Validation Rules
college
New Custom Field
Help for this Page
Step 4. Establish field-level security
Step 4 of 5
Previous
Next
Cancel
Field Label Total count
Data Type Roll-Up Summary
Field Name Total_count
Description
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
Analytics Cloud Security User
Cloud Kicks Admin
Contract Manager
Cross Org Data Proxy User
Custom: Marketing Profile
Custom: Sales Profile
Custom: Support Profile
customer



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.

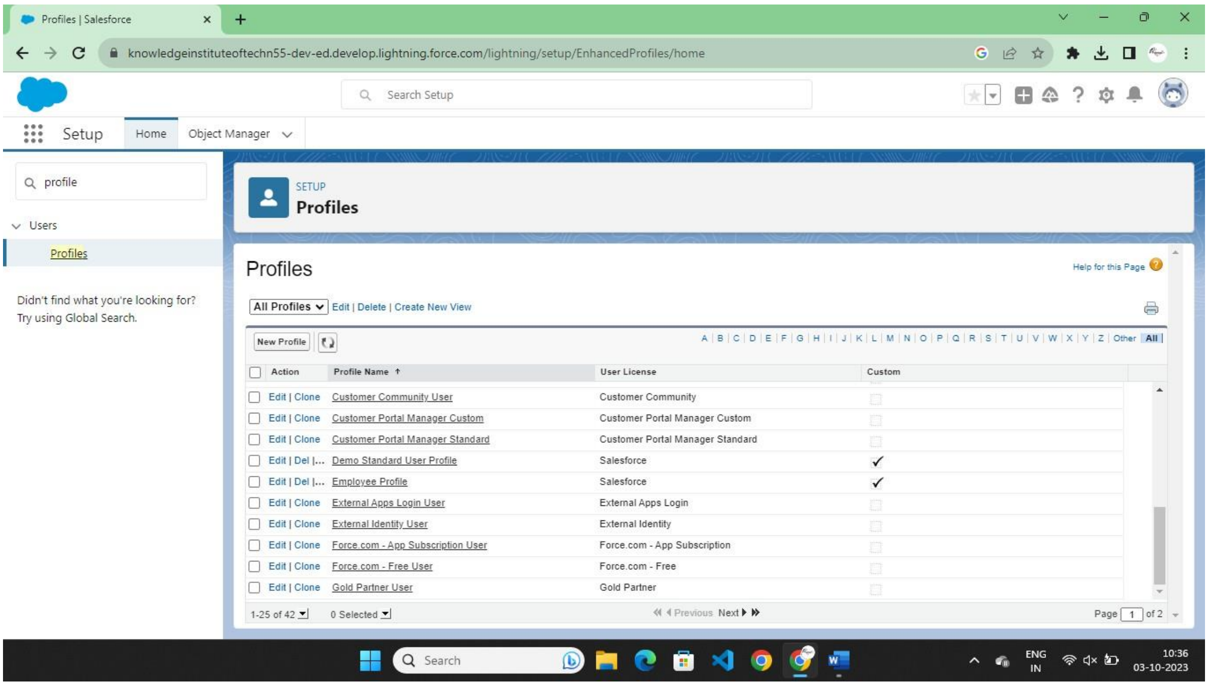
Assign a Password:

- 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.

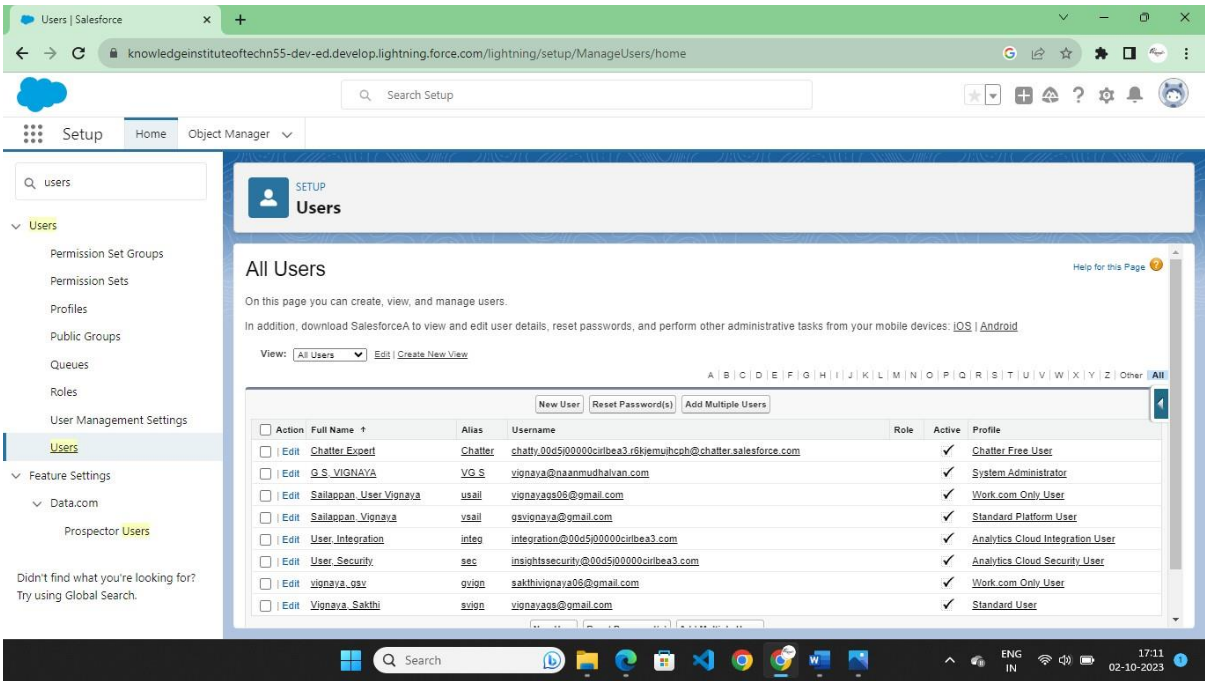
Verify User Creation:

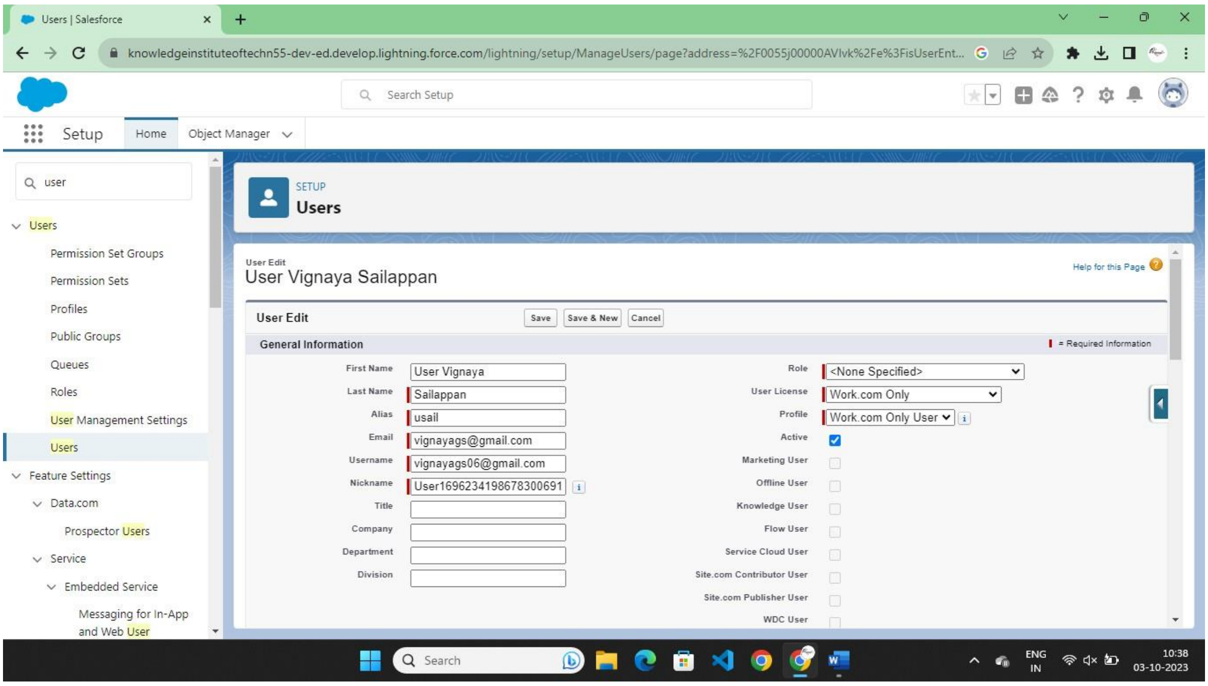
- Log out of your administrator account and log in as the newly created user to ensure they have the expected access and permissions.

Profile Creation:



User Creation:





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.

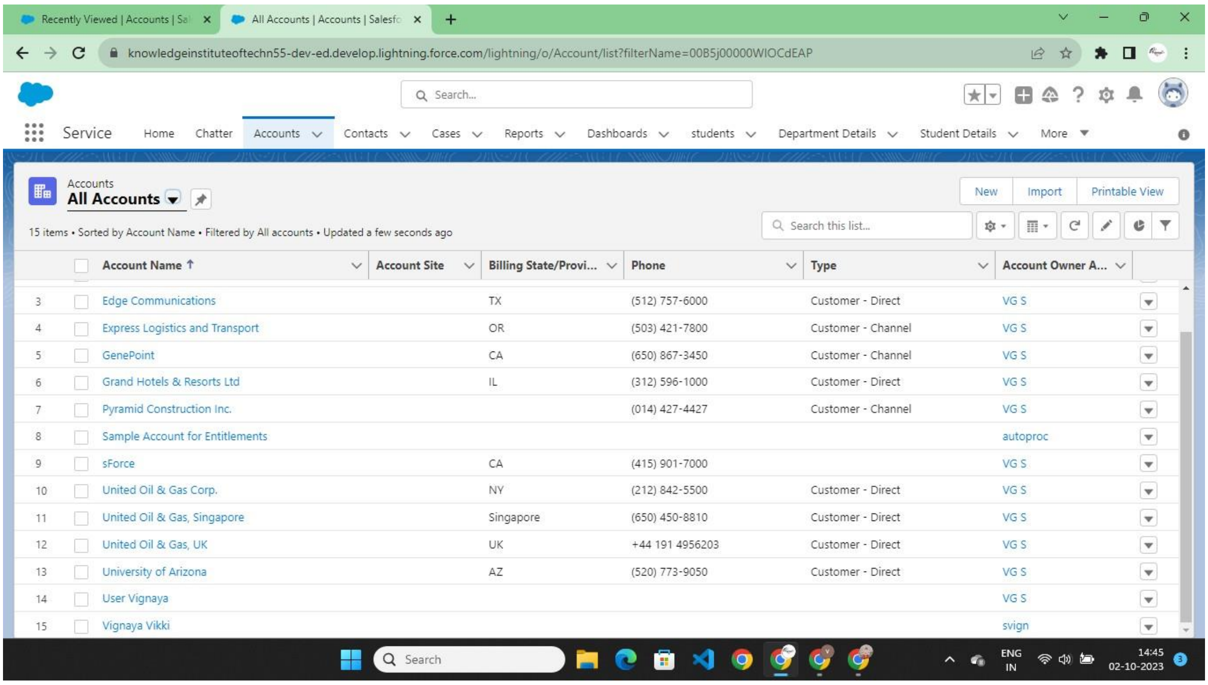
Sharing rules are automatic exceptions to org-wide defaults for particular groups of users, to give them access to records they don’t own or can’t normally see.

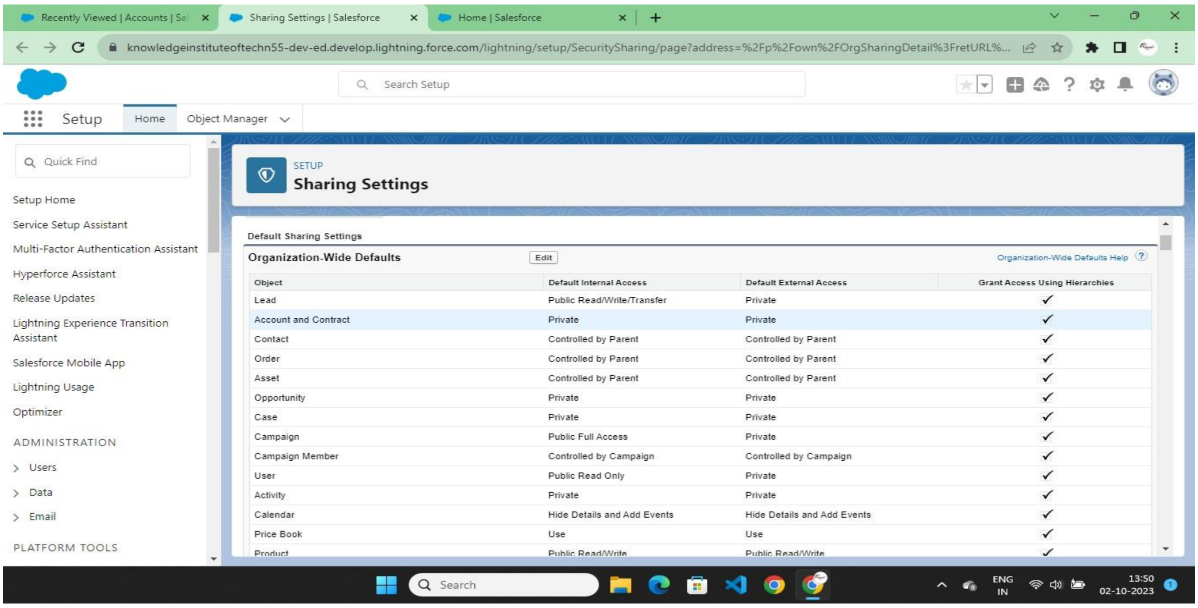
Manual sharing lets record owners give read and edit permissions to users who might not have access to the record any other way.

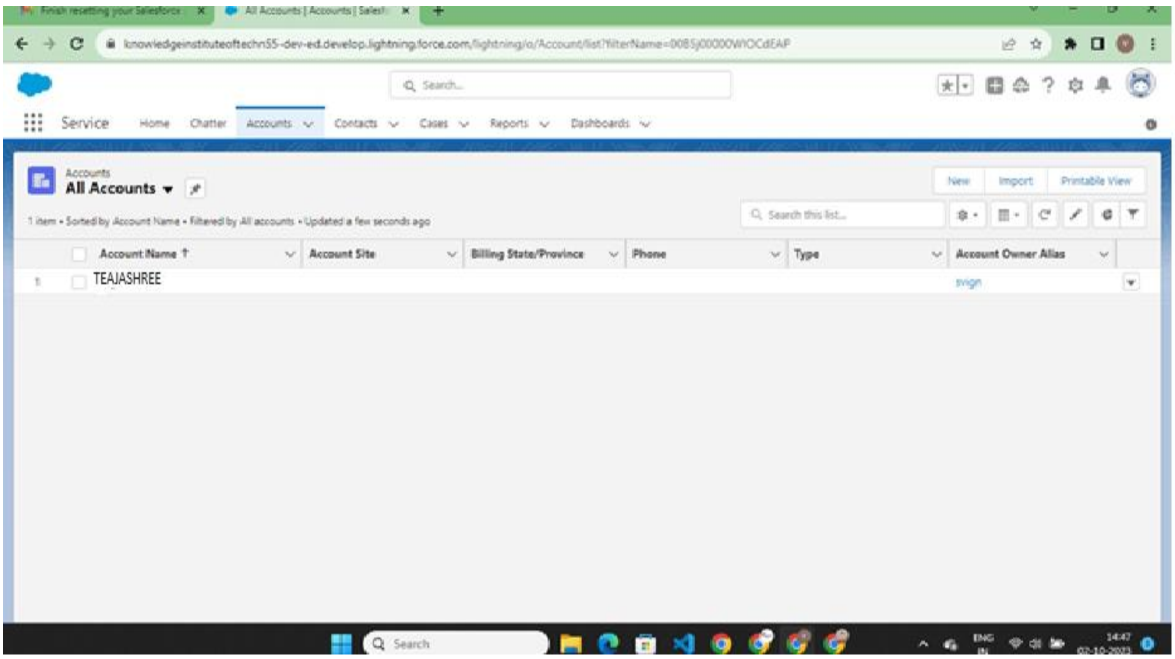
In admin:

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.







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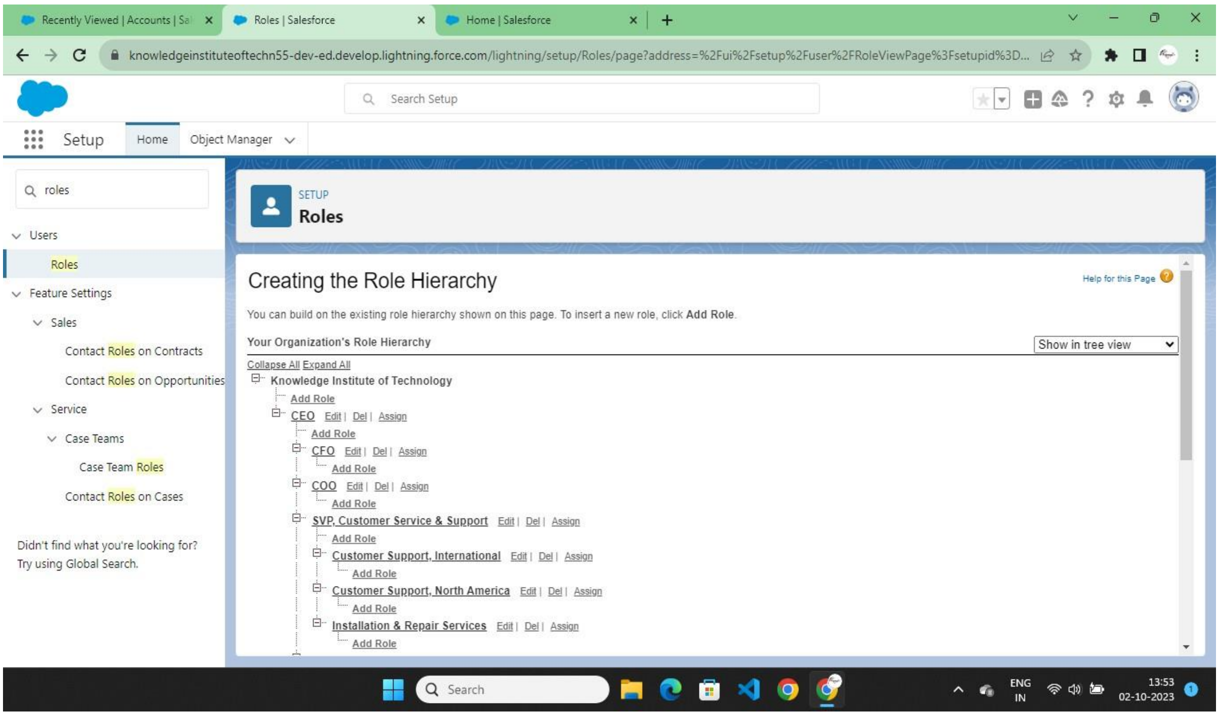

Recently Viewed | Accounts | Sal
Roles | Salesforce
Home | Salesforce
knowledgeinstituteoftechn55-dev-ed.develop.lightning.force.com/lightning/setup/Roles/page?address=%2Fui%2Fsetup%2Fuser%2FRoleViewPage%3Fsetupid%3D...
Search Setup
Setup
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roles
Users
Roles
Feature Settings
Sales
Contact Roles on Contracts
Contact Roles on Opportunities
Service
Case Teams
Case Team Roles
Contact Roles on Cases
Didn't find what you're looking for?
Try using Global Search.
SETUP
Roles
Creating the Role Hierarchy
Help for this Page
You can build on the existing role hierarchy shown on this page. To insert a new role, click Add Role.
Your Organization's Role Hierarchy
Show in tree view
Collapse All Expand All
Knowledge Institute of Technology
Add Role
CEO Edit | Del | Assign
Add Role
CFO Edit | Del | Assign
Add Role
COO Edit | Del | Assign
Add Role
SVP, Customer Service & Support Edit | Del | Assign
Add Role
Customer Support, International Edit | Del | Assign
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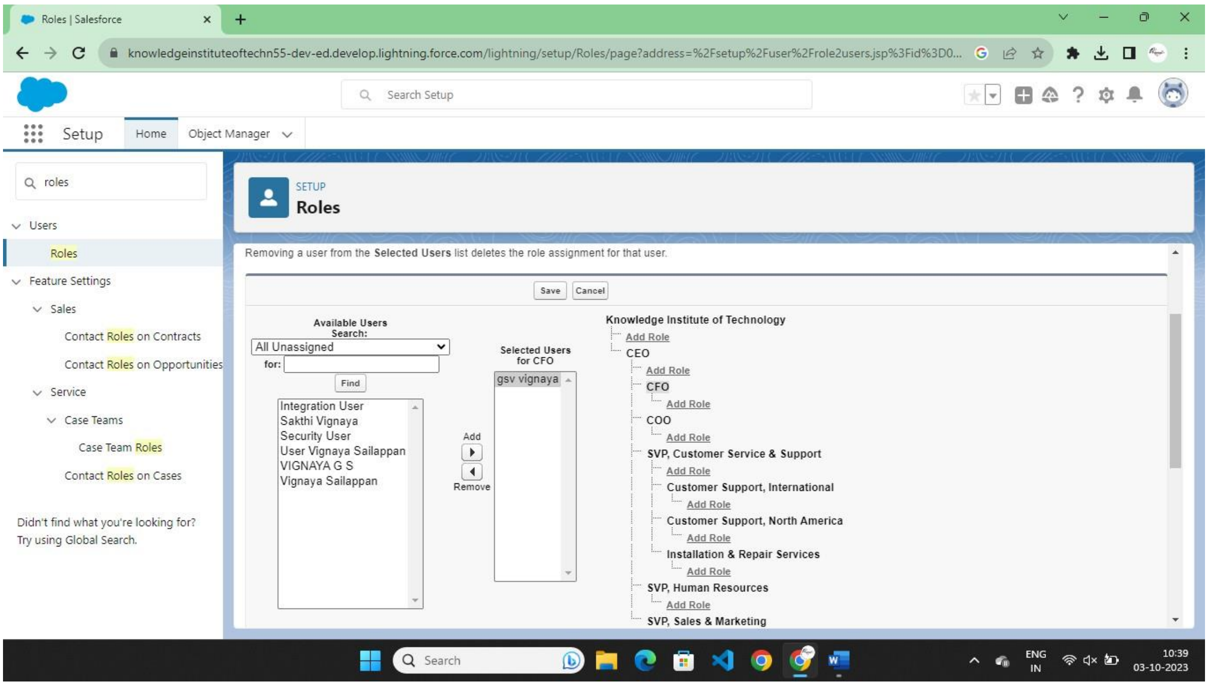

Roles | Salesforce
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Search Setup
Setup
Home
Object Manager
roles
Users
Roles
Feature Settings
Sales
Contact Roles on Contracts
Contact Roles on Opportunities
Service
Case Teams
Case Team Roles
Contact Roles on Cases
Didn't find what you're looking for?
Try using Global Search.
SETUP
Roles
Removing a user from the Selected Users list deletes the role assignment for that user.
Save
Cancel
Available Users
Search:
All Unassigned
for:
Find
Integration User
Sakthi Vignaya
Security User
User Vignaya Sailappan
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Vignaya Sailappan
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Knowledge Institute of Technology
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CEO
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CFO
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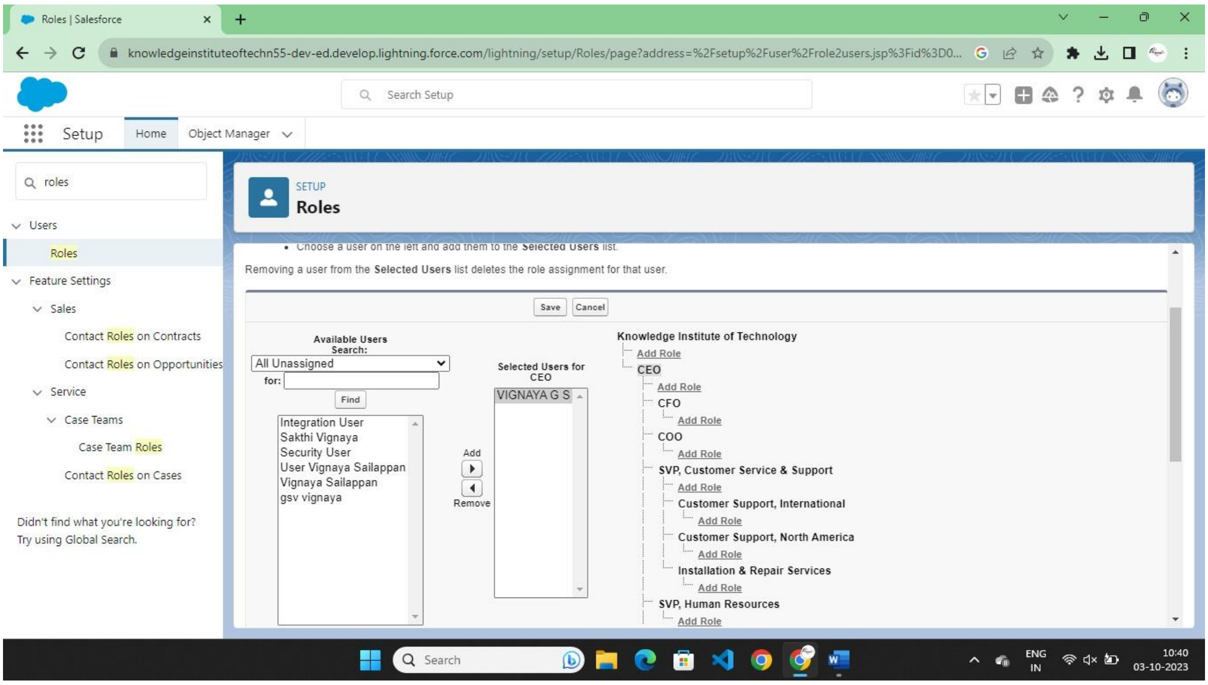


3.Suppose there are 2 Users and they are having Create, Read, Edit access on Account Object with the same profile but we want to open up the access for one user to delete how will you implement the Security setting.

Step 1: Create a Permission Set for Delete Access

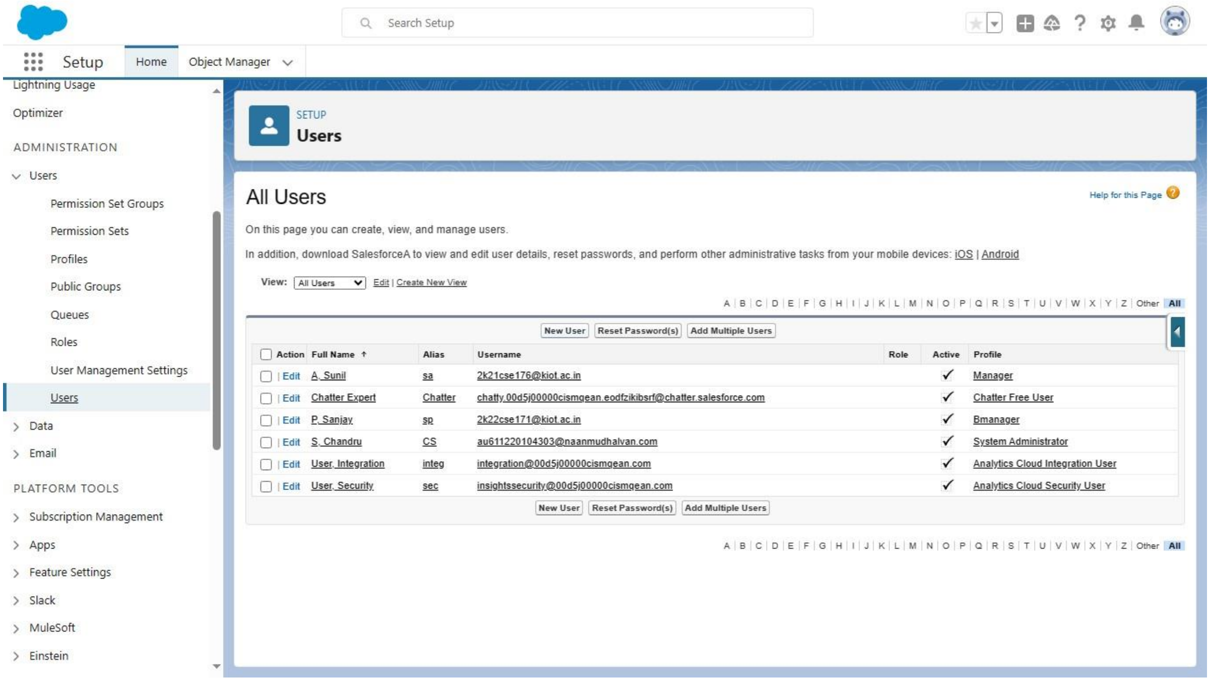
1. Go to "Setup" in Salesforce.

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

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

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

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


Search Setup
Setup
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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
SETUP
Users
All Users
Help for this Page
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
View: All Users Edit | Create New View
A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All
New User Reset Password(s) Add Multiple Users
Action Full Name Alias Username Role Active Profile
Edit A, Sunil sa 2k21cse176@kiot.ac.in ✓ Manager
Edit Chatter Expert Chatter chatty.00d5j00000cismgean.eodfzikibsrf@chatter.salesforce.com ✓ Chatter Free User
Edit P, Sanjay sp 2k22cse171@kiot.ac.in ✓ Bmanager
Edit S, Chandru CS au611220104303@naanmudhalvan.com ✓ System Administrator
Edit User, Integration integ integration@00d5j00000cismgean.com ✓ Analytics Cloud Integration User
Edit User, Security sec insightssecurity@00d5j00000cismgean.com ✓ Analytics Cloud Security User
New User Reset Password(s) Add Multiple Users
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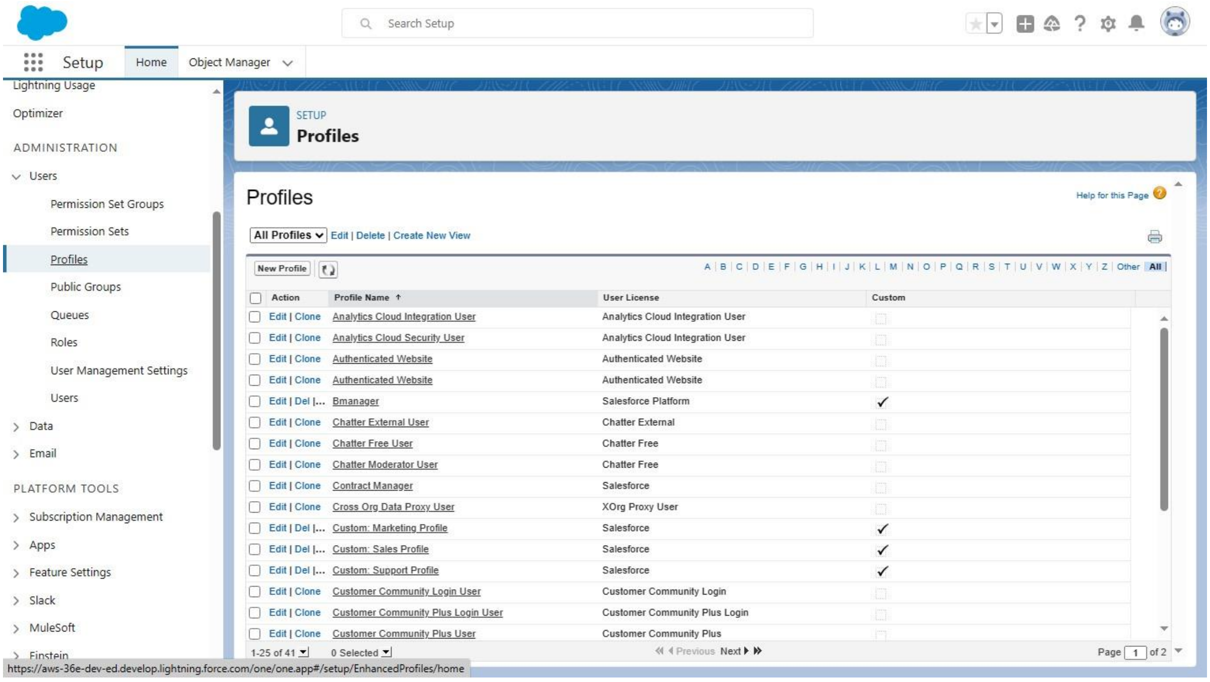
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Einstein
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Help for this Page
All Profiles Edit | Delete | Create New View
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Edit | Clone Analytics Cloud Security User Analytics Cloud Integration User
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Edit | Clone Contract Manager Salesforce
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Edit | Del |... Custom: Sales Profile Salesforce ✓
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1-25 of 41 0 Selected Previous Next Page 1 of 2
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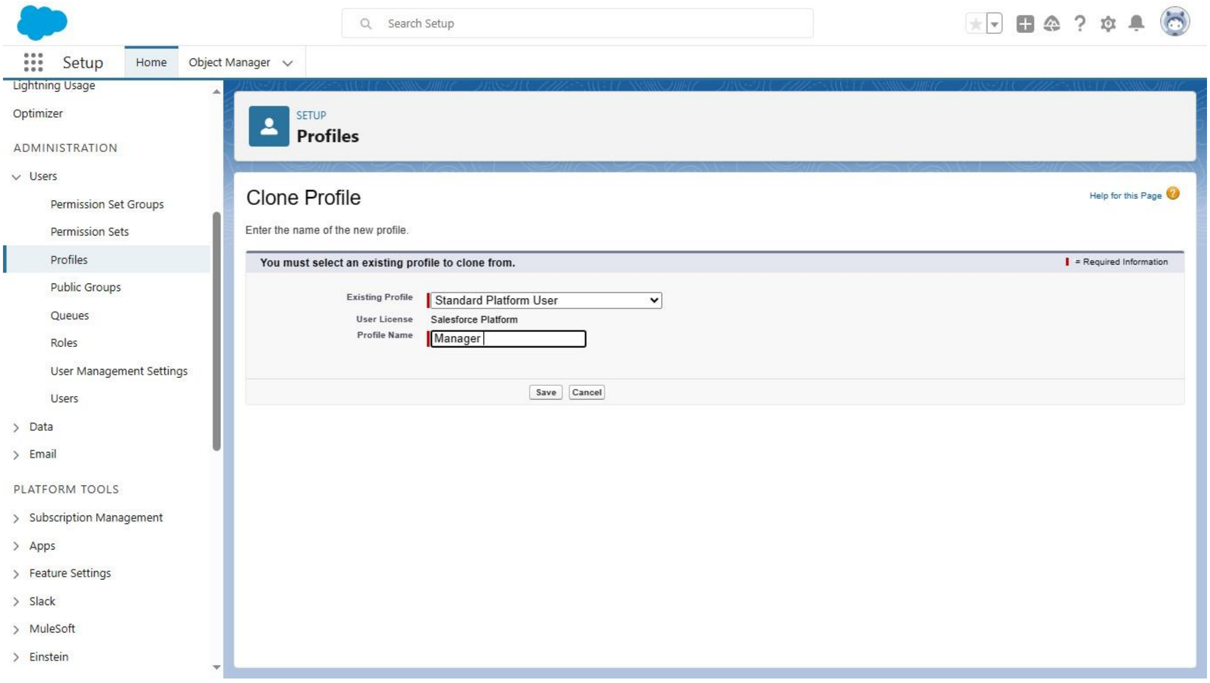
Search Setup
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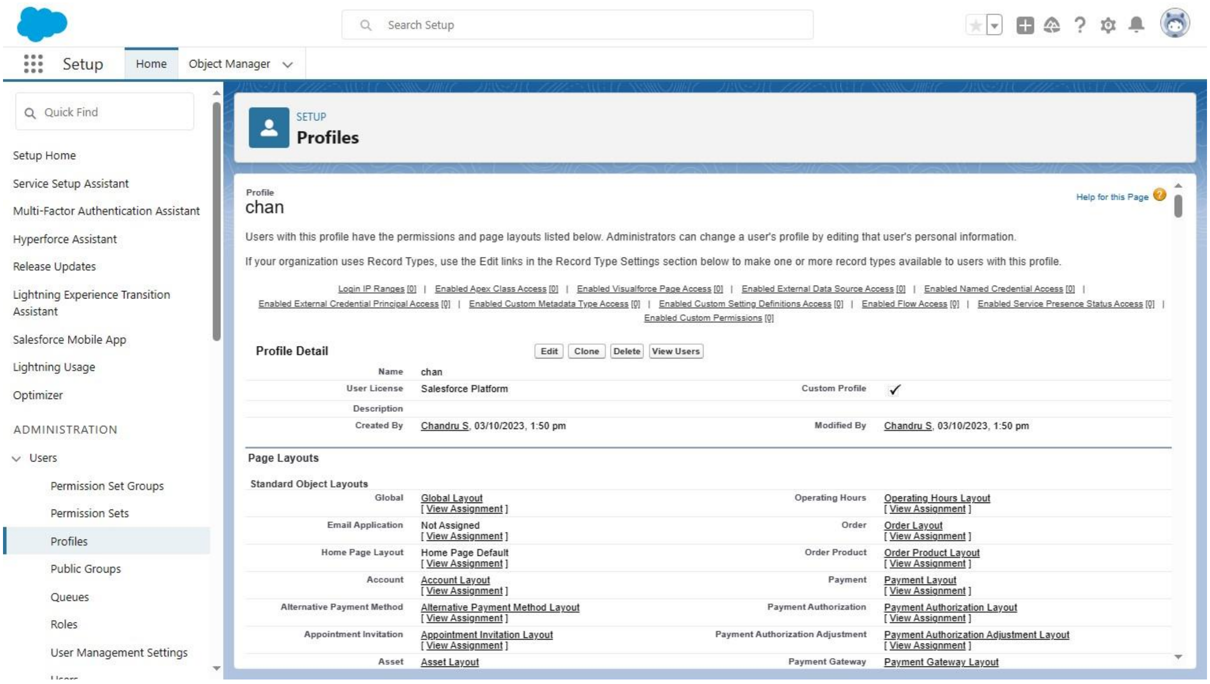
PLATFORM TOOLS
Subscription Management
Apps
Feature Settings
Slack
MuleSoft
Einstein
SETUP
Profiles
Clone Profile
Help for this Page
Enter the name of the new profile.
You must select an existing profile to clone from.
= Required Information
Existing Profile
Standard Platform User
User License
Salesforce Platform
Profile Name
Manager
Save
Cancel


Search Setup
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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
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Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
SETUP
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Profile
chan
Help for this Page
Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.
If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.
Login IP Ranges [0] | Enabled Apex Class Access [0] | Enabled Visualforce Page Access [0] | Enabled External Data Source Access [0] | Enabled Named Credential Access [0] |
Enabled External Credential Principal Access [0] | Enabled Custom Metadata Type Access [0] | Enabled Custom Setting Definitions Access [0] | Enabled Flow Access [0] | Enabled Service Presence Status Access [0] |
Enabled Custom Permissions [0]
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Delete
View Users
Name
chan
User License
Salesforce Platform
Custom Profile
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Modified By
Chandru S, 03/10/2023, 1:50 pm
Page Layouts
Standard Object Layouts
Global
Global Layout
[View Assignment]
Operating Hours
Operating Hours Layout
[View Assignment]
Email Application
Not Assigned
[View Assignment]
Order
Order Layout
[View Assignment]
Home Page Layout
Home Page Default
[View Assignment]
Order Product
Order Product Layout
[View Assignment]
Account
Account Layout
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Payment
Payment Layout
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Alternative Payment Method
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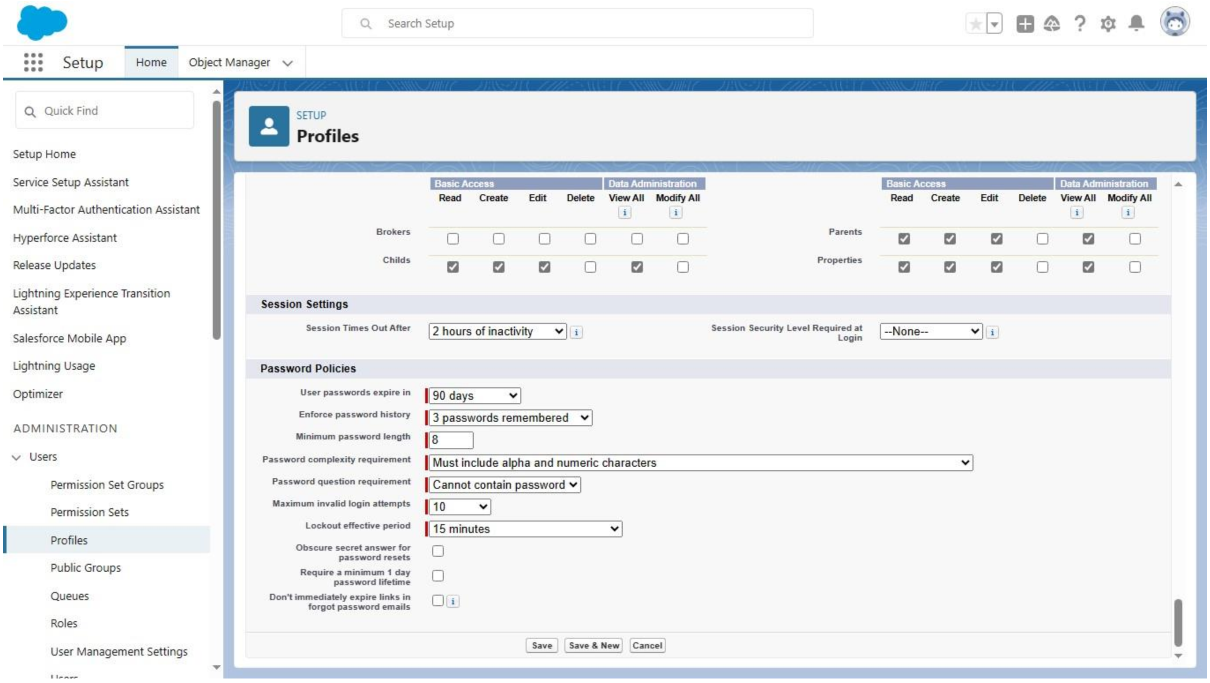
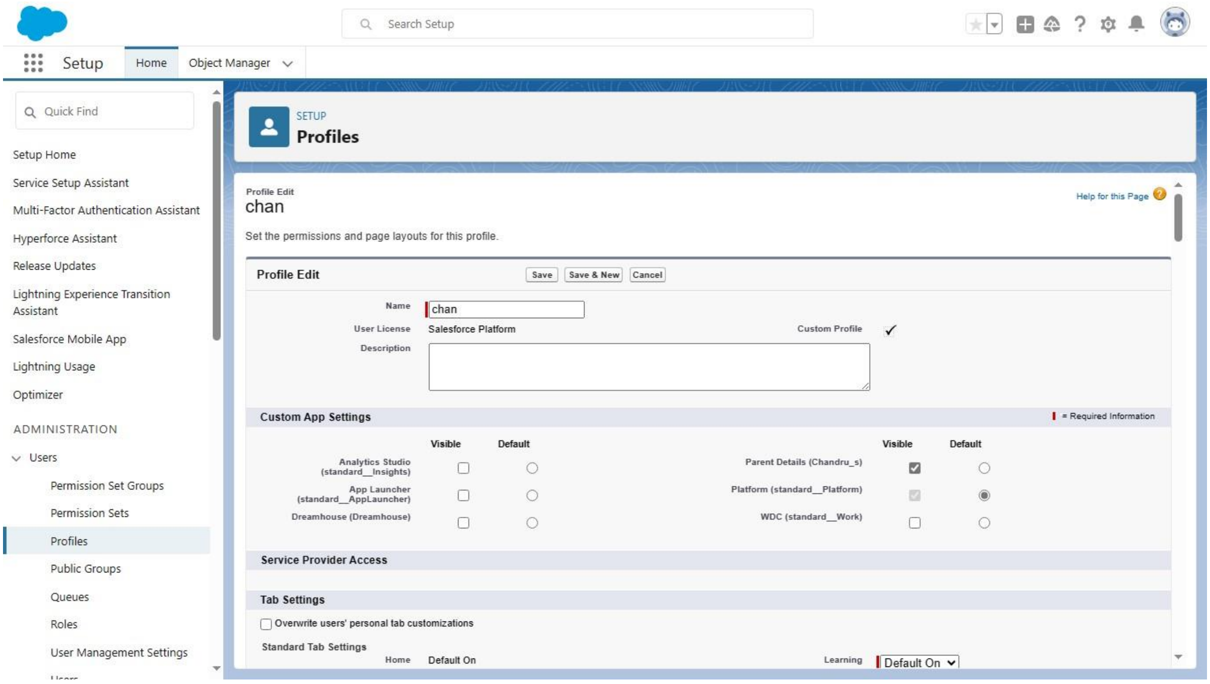
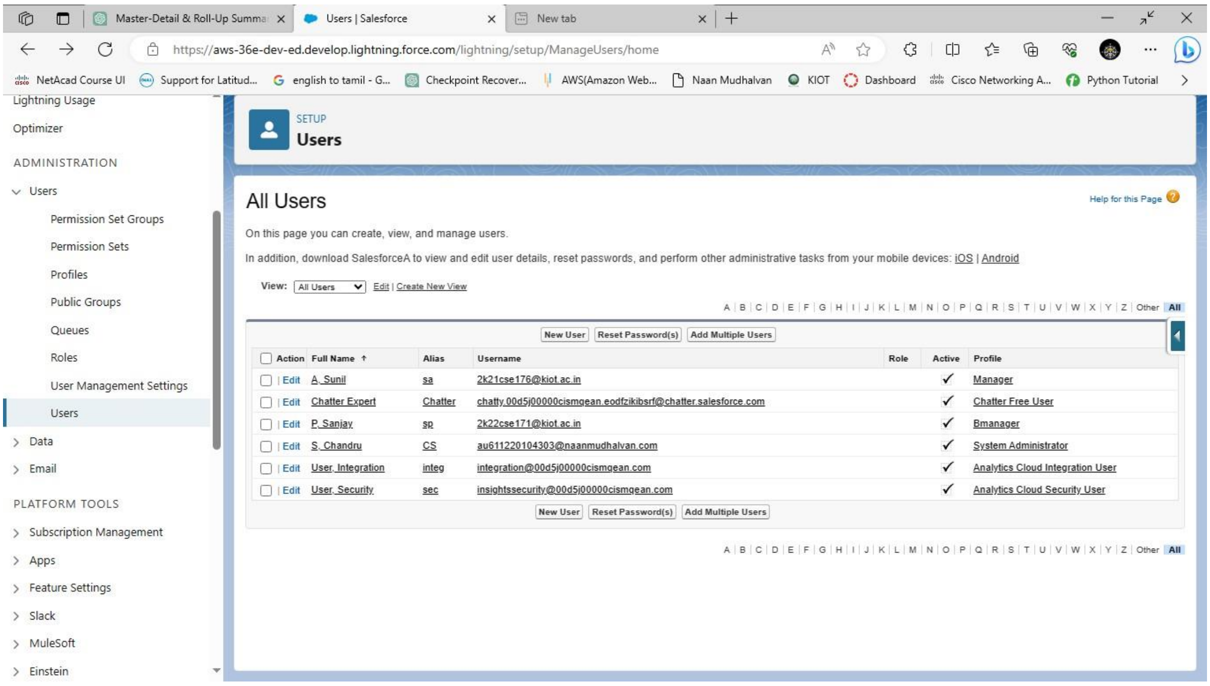
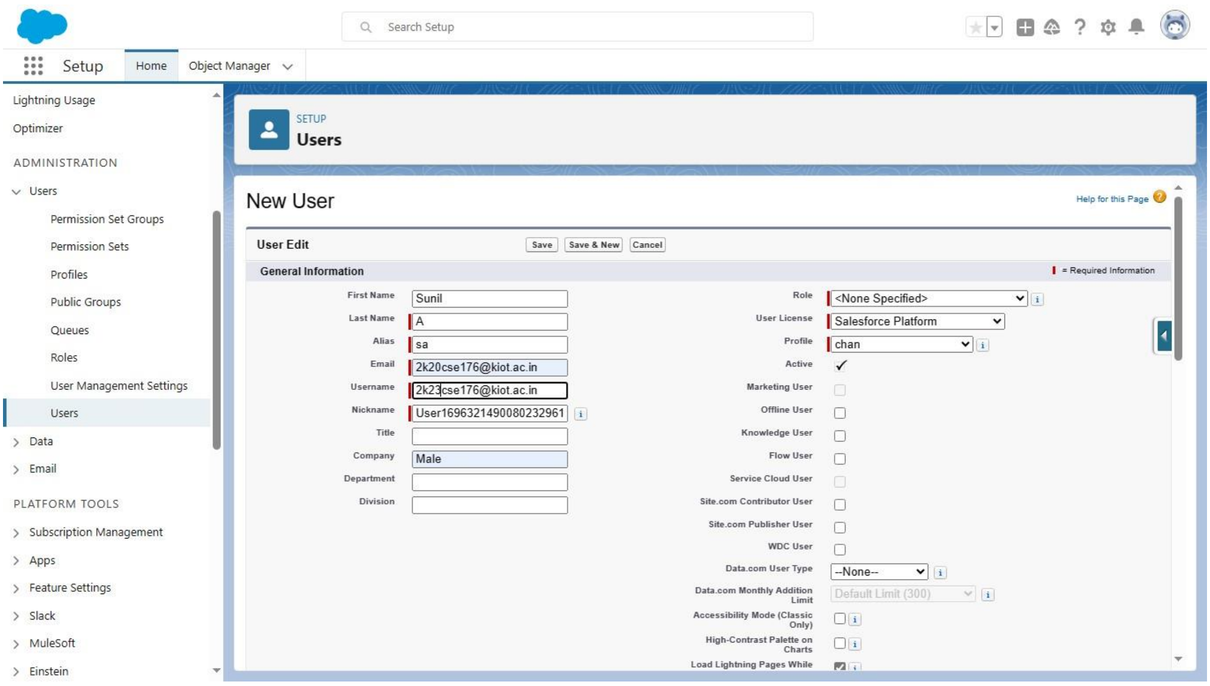
Payment Gateway Layout


Search Setup
Setup
Home
Object Manager
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
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
Childs
Parents
Properties
Session Settings
Session Times Out After
2 hours of inactivity
Session Security Level Required at Login
--None--
Password Policies
User passwords expire in
90 days
Enforce password history
3 passwords remembered
Minimum password length
8
Password complexity requirement
Must include alpha and numeric characters
Password question requirement
Cannot contain password
Maximum invalid login attempts
10
Lockout effective period
15 minutes
Obscure secret answer for password resets
Require a minimum 1 day password lifetime
Don't immediately expire links in forgot password emails
Save
Save & New
Cancel

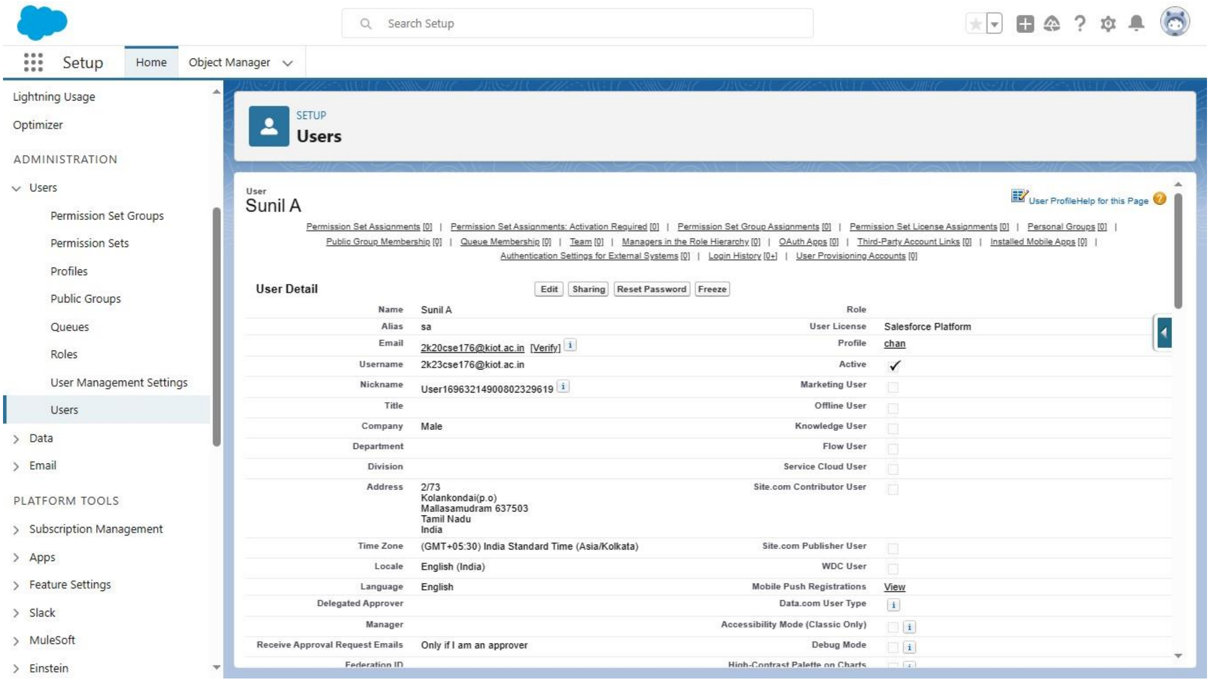

Search Setup
Setup
Home
Object Manager
Quick Find
Setup Home
Service Setup Assistant
Multi-Factor Authentication Assistant
Hyperforce Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Permission Set Groups
Permission 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
Save
Save & New
Cancel
Name
chan
User License
Salesforce Platform
Custom Profile
Description
Custom App Settings
= Required Information
Visible
Default
Analytics Studio (standard__Insights)
App Launcher (standard__AppLauncher)
Dreamhouse (Dreamhouse)
Parent Details (Chandru_s)
Platform (standard__Platform)
WDC (standard__Work)
Service Provider Access
Tab Settings
Overwrite users' personal tab customizations
Standard Tab Settings
Home
Default On
Learning
Default On

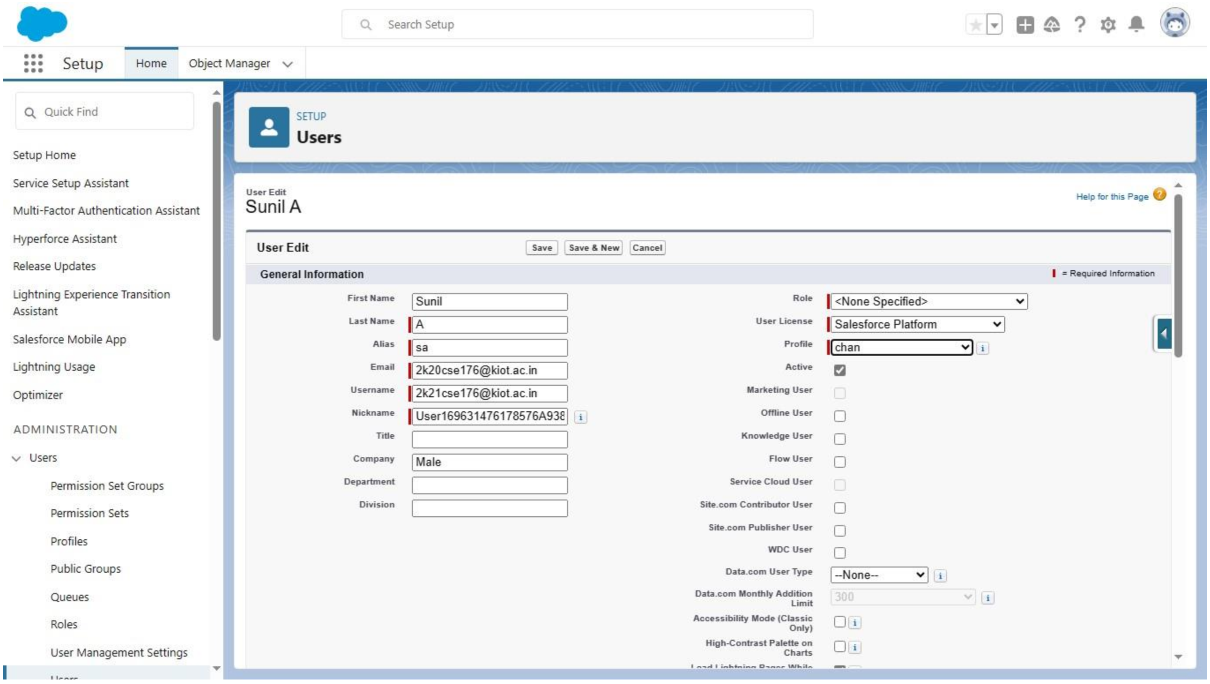


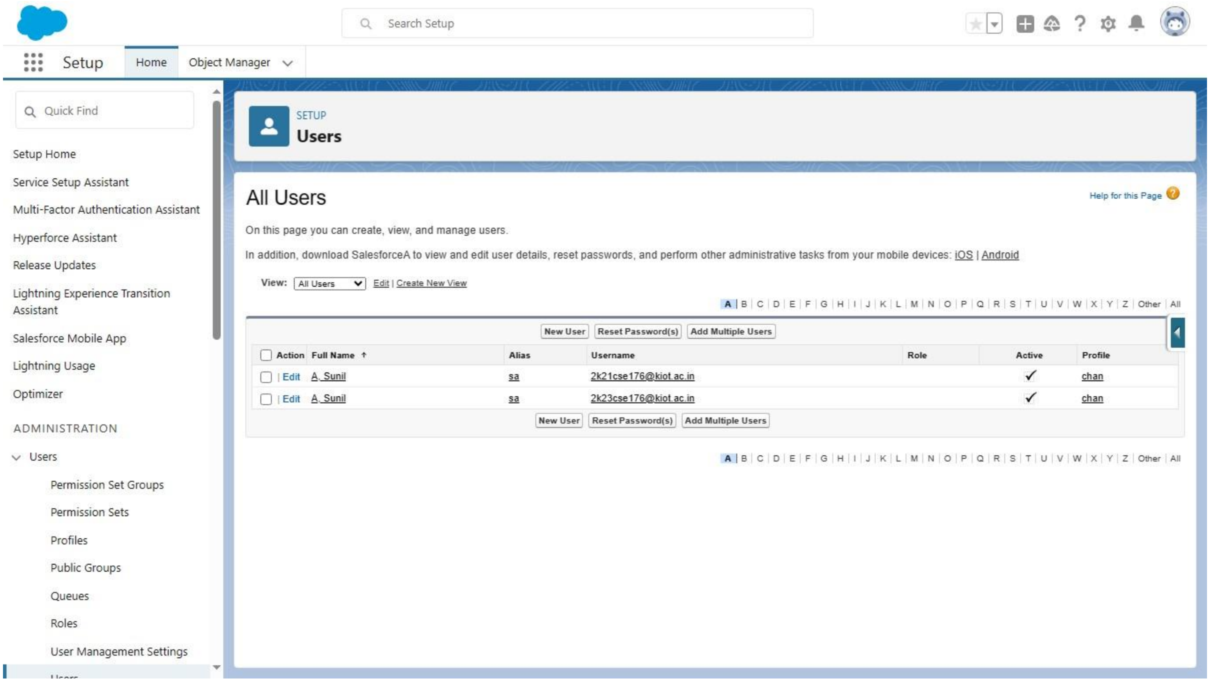
Master-Detail & Roll-Up Summa
Users | Salesforce
New tab
https://aws-36e-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/home
Lightning Usage
Optimizer
ADMINISTRATION
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Data
Email
PLATFORM TOOLS
Subscription Management
Apps
Feature Settings
Slack
MuleSoft
Einstein
SETUP
Users
All Users
Help for this Page
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
View: All Users Edit | Create New View
New User Reset Password(s) Add Multiple Users
Action Full Name Alias Username Role Active Profile
Edit A, Sunil sa 2k21cse176@kiot.ac.in Manager
Edit Chatter Expert Chatter chatty.00d5j00000cismgean.eodfzikibsrf@chatter.salesforce.com Chatter Free User
Edit P, Sanjay sp 2k22cse171@kiot.ac.in Bmanager
Edit S, Chandru CS au611220104303@naanmudhalvan.com System Administrator
Edit User, Integration integ integration@00d5j00000cismgean.com Analytics Cloud Integration User
Edit User, Security sec insightssecurity@00d5j00000cismgean.com Analytics Cloud Security User



Search Setup
Setup
Home
Object Manager
SETUP
Users
New User
Help for this Page
User Edit
Save Save & New Cancel
General Information
= Required Information
First Name Sunil
Last Name A
Alias sa
Email 2k20cse176@kiot.ac.in
Username 2k23cse176@kiot.ac.in
Nickname User16963214900802329
Title
Company Male
Department
Division
Role <None Specified>
User License Salesforce Platform
Profile chan
Active
Marketing User
Offline User
Knowledge User
Flow User
Service Cloud User
Site.com Contributor User
Site.com Publisher User
WDC User
Data.com User Type --None--
Data.com Monthly Addition Limit Default Limit (300)
Accessibility Mode (Classic Only)
High-Contrast Palette on Charts
Load Lightning Pages While


Search Setup
Setup
Home
Object Manager
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
SETUP
Users
User
Sunil A
User ProfileHelp for this Page
User Detail
Edit
Sharing
Reset Password
Freeze
Name Sunil A
Role
Alias sa
User License Salesforce Platform
Email 2k20cse176@kiot.ac.in [Verify]
Profile chan
Username 2k23cse176@kiot.ac.in
Active
Nickname User16963214900802329619
Marketing User
Title
Offline User
Company Male
Knowledge User
Department
Flow User
Division
Service Cloud User
Address 2/73 Kolankondai(p.o) Mallasamudram 637503 Tamil Nadu India
Site.com Contributor User
Time Zone (GMT+05:30) India Standard Time (Asia/Kolkata)
Site.com Publisher User
Locale English (India)
WDC User
Language English
Mobile Push Registrations View
Delegated Approver
Data.com User Type
Manager
Accessibility Mode (Classic Only)
Receive Approval Request Emails Only if I am an approver
Debug Mode


Search Setup
Setup
Home
Object Manager
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
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
SETUP
Users
User Edit
Sunil A
Help for this Page
User Edit
Save
Save & New
Cancel
General Information
= Required Information
First Name Sunil
Role <None Specified>
Last Name A
User License Salesforce Platform
Alias sa
Profile chan
Email 2k20cse176@kiot.ac.in
Active
Username 2k21cse176@kiot.ac.in
Marketing User
Nickname User169631476178576A938
Offline User
Title
Knowledge User
Company Male
Flow User
Department
Service Cloud User
Division
Site.com Contributor User
Site.com Publisher User
WDC User
Data.com User Type --None--
Data.com Monthly Addition Limit 300
Accessibility Mode (Classic Only)
High-Contrast Palette on Charts

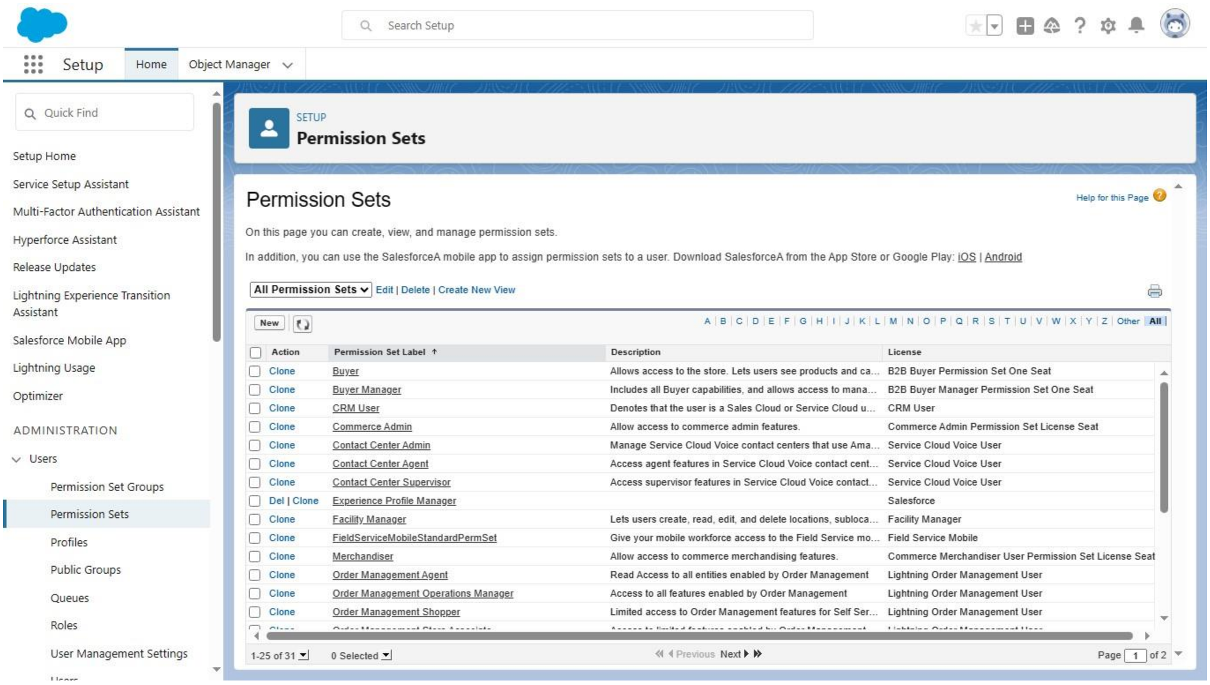


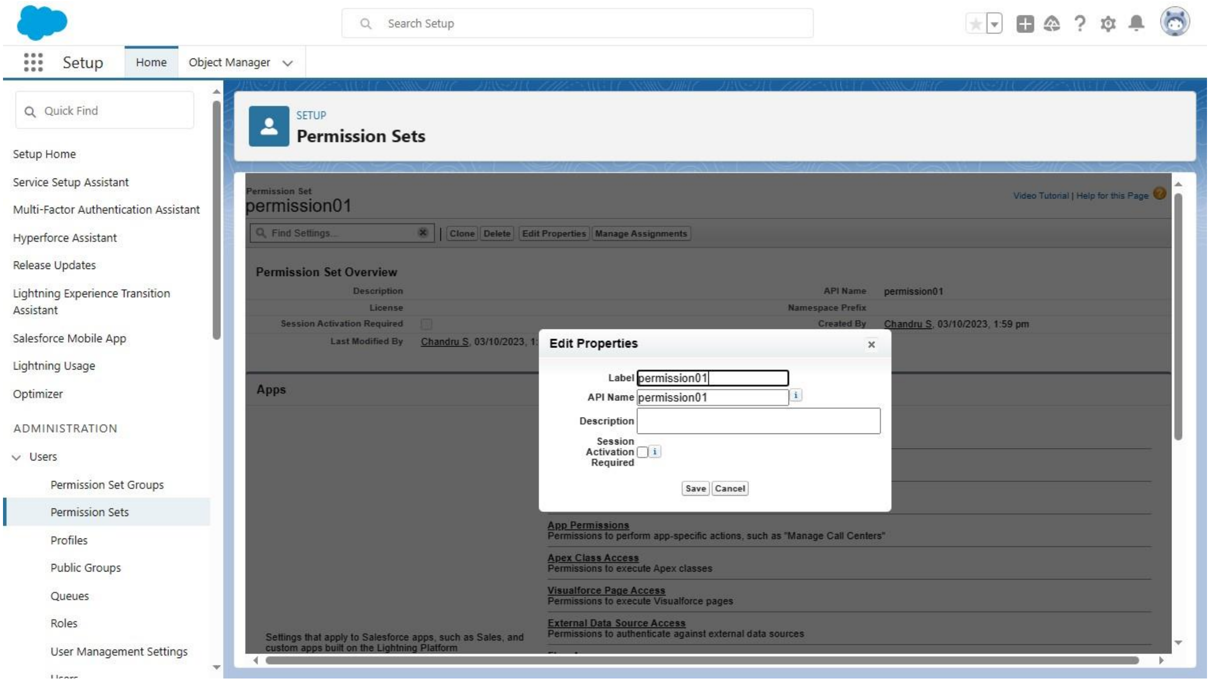
Step 2: Assign the Permission Set to the User Needing Delete Access

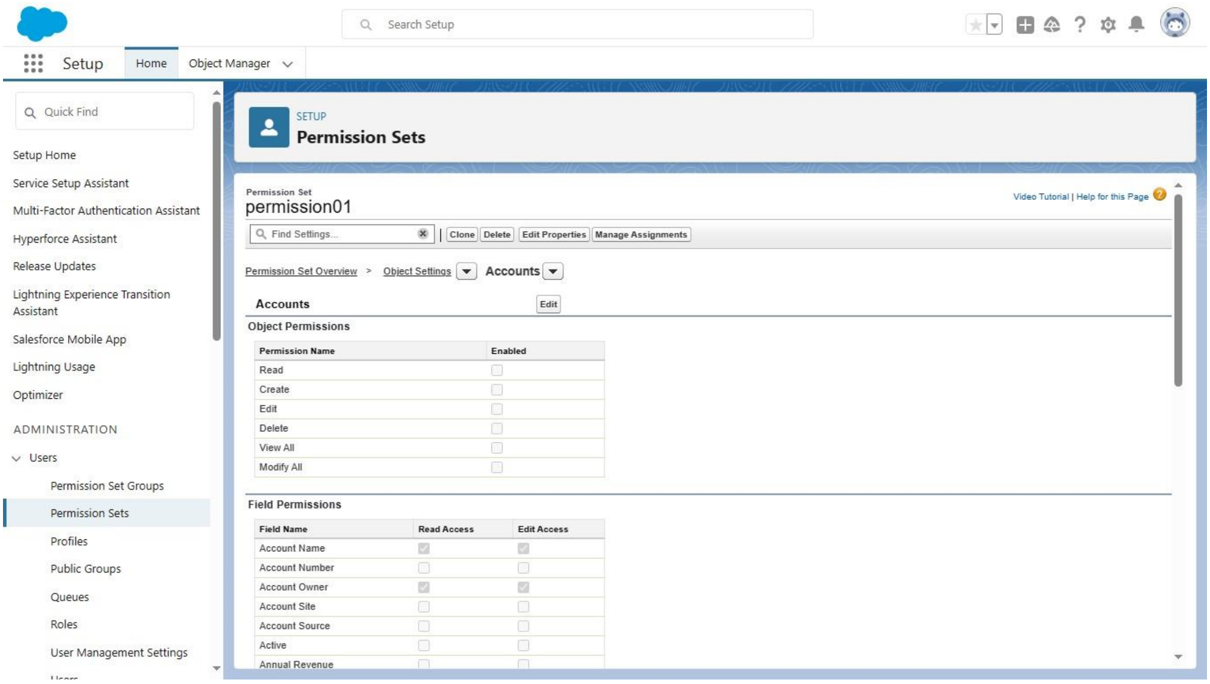
1. In the "Permission Set Detail" page, click on "Manage Assignments."

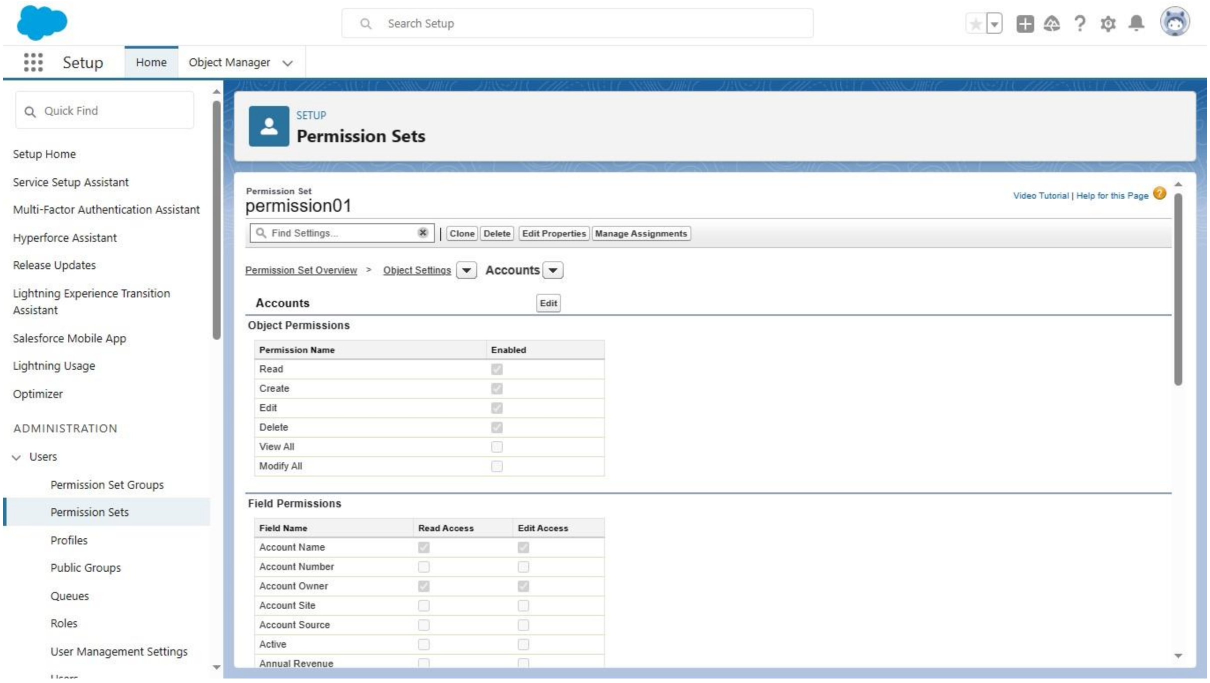
2. Click "Add Assignments" and select the user who needs delete access.

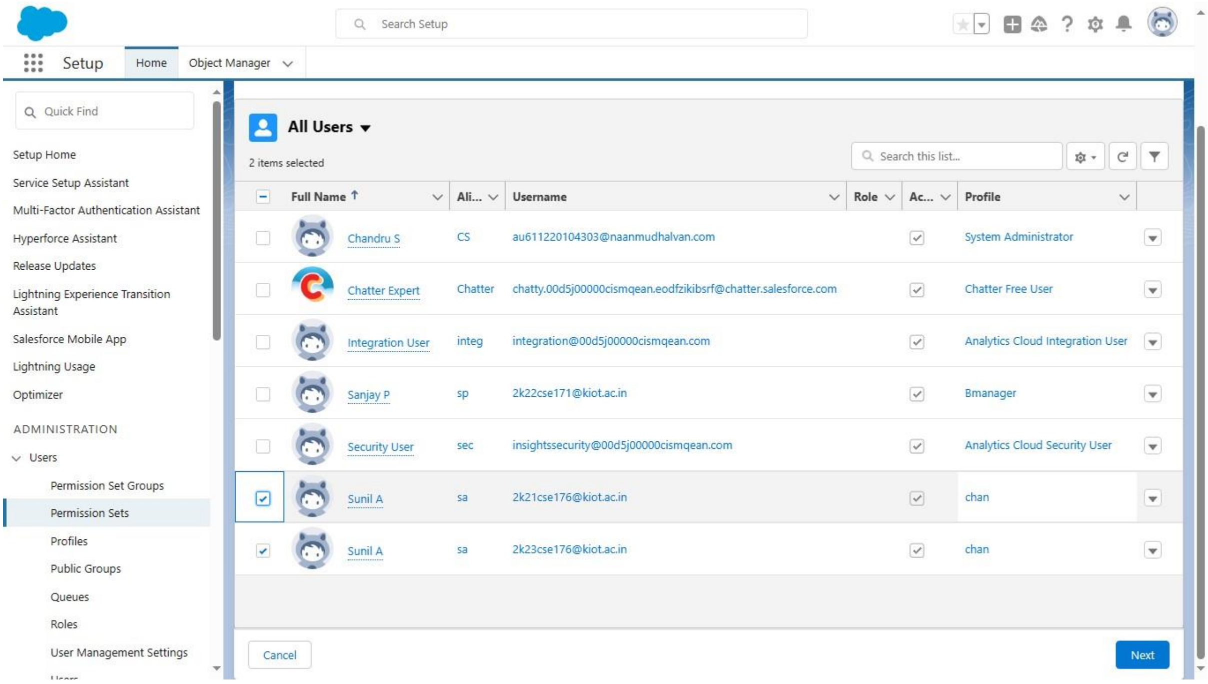
3. Save the assignment.

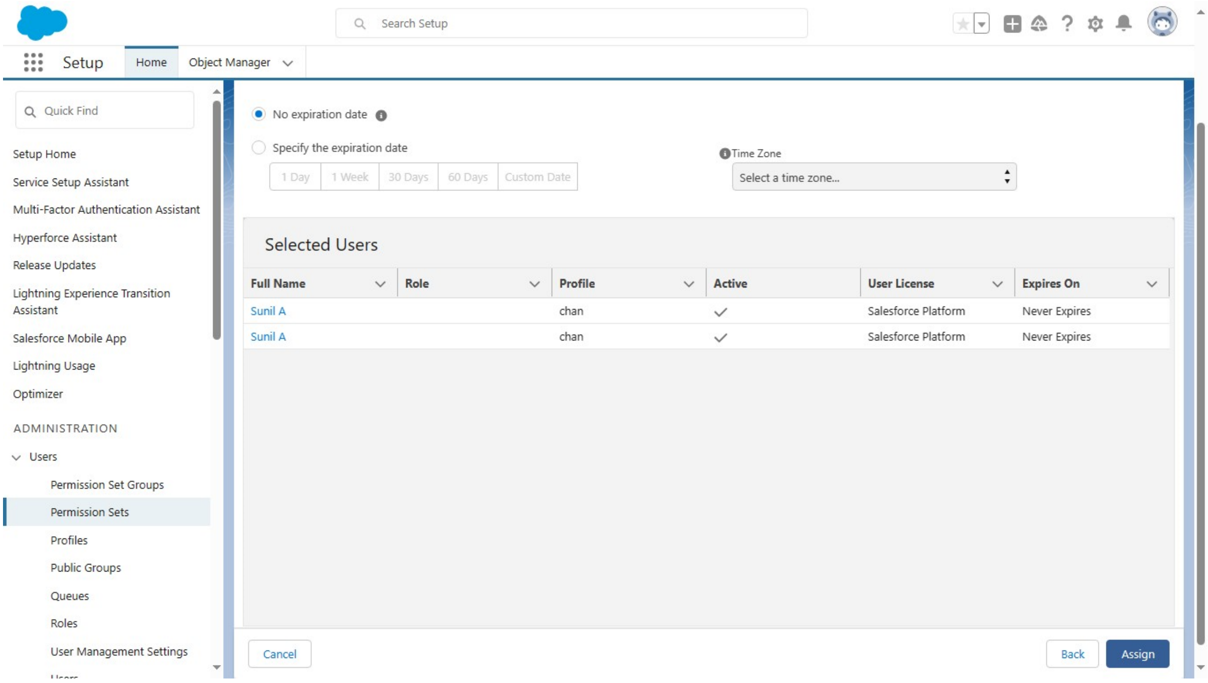


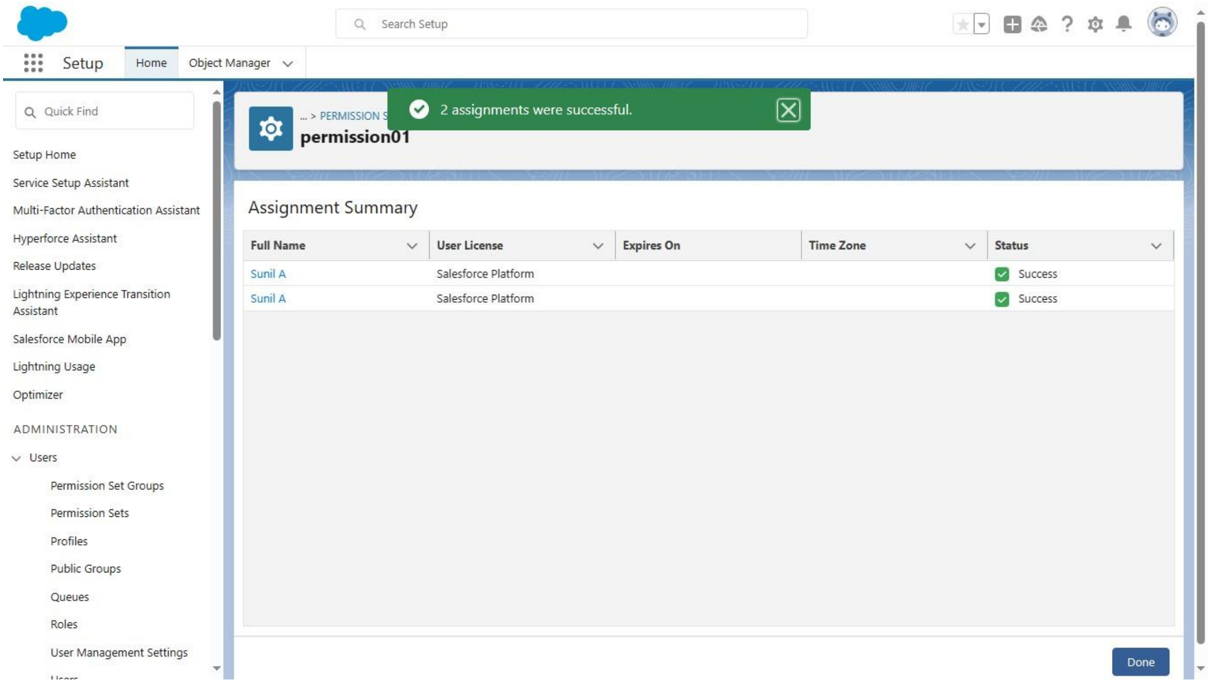

Search Setup
Setup
Home
Object Manager
Quick Find
Setup Home
Service Setup Assistant
Multi-Factor Authentication Assistant
Hyperforce Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Permission Set Groups
Permission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


Search Setup
Setup
Home
Object Manager
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
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
SETUP
Permission Sets
Permission Set
permission01
Video Tutorial | Help for this Page
Find Settings...
Clone
Delete
Edit Properties
Manage Assignments
Permission Set Overview > Object Settings
Accounts
Accounts
Edit
Object Permissions
Permission Name
Enabled
Read
Create
Edit
Delete
View All
Modify All
Field Permissions
Field Name
Read Access
Edit Access
Account Name
Account Number
Account Owner
Account Site
Account Source
Active
Annual Revenue


Search Setup
Setup
Home
Object Manager
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
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
SETUP
Permission Sets
Permission Set
permission01
Video Tutorial | Help for this Page
Find Settings...
Clone
Delete
Edit Properties
Manage Assignments
Permission Set Overview > Object Settings
Accounts
Accounts
Edit
Object Permissions
Permission Name
Enabled
Read
Create
Edit
Delete
View All
Modify All
Field Permissions
Field Name
Read Access
Edit Access
Account Name
Account Number
Account Owner
Account Site
Account Source
Active
Annual Revenue


Search Setup
Setup
Home
Object Manager
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
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
All Users
2 items selected
Search this list...
Full Name
Ali...
Username
Role
Ac...
Profile
Chandru S
CS
au611220104303@naanmudhalvan.com
System Administrator
Chatter Expert
Chatter
chatty.00d5j00000cismqean.eodfzikibsrf@chatter.salesforce.com
Chatter Free User
Integration User
integ
integration@00d5j00000cismqean.com
Analytics Cloud Integration User
Sanjay P
sp
2k22cse171@kiot.ac.in
Bmanager
Security User
sec
insightssecurity@00d5j00000cismqean.com
Analytics Cloud Security User
Sunil A
sa
2k21cse176@kiot.ac.in
chan
Sunil A
sa
2k23cse176@kiot.ac.in
chan
Cancel
Next





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

Step 1: Access Salesforce Setup

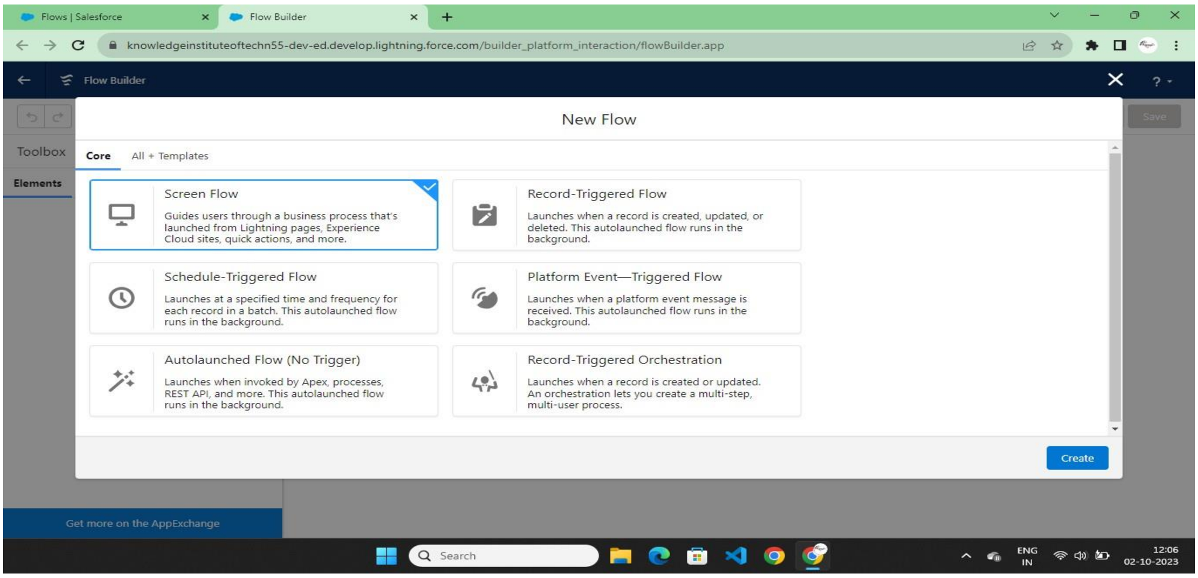
1. Log in to your Salesforce account.

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

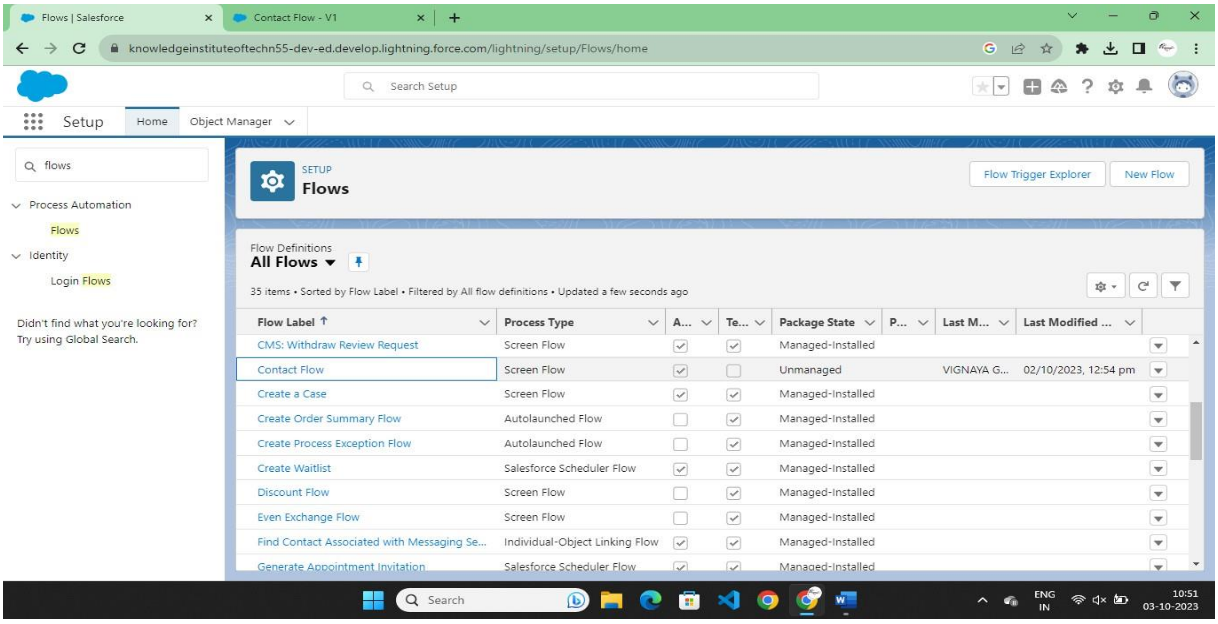
1. Drag and drop a "Screen" element onto the canvas. This will be the starting point of yourflow.

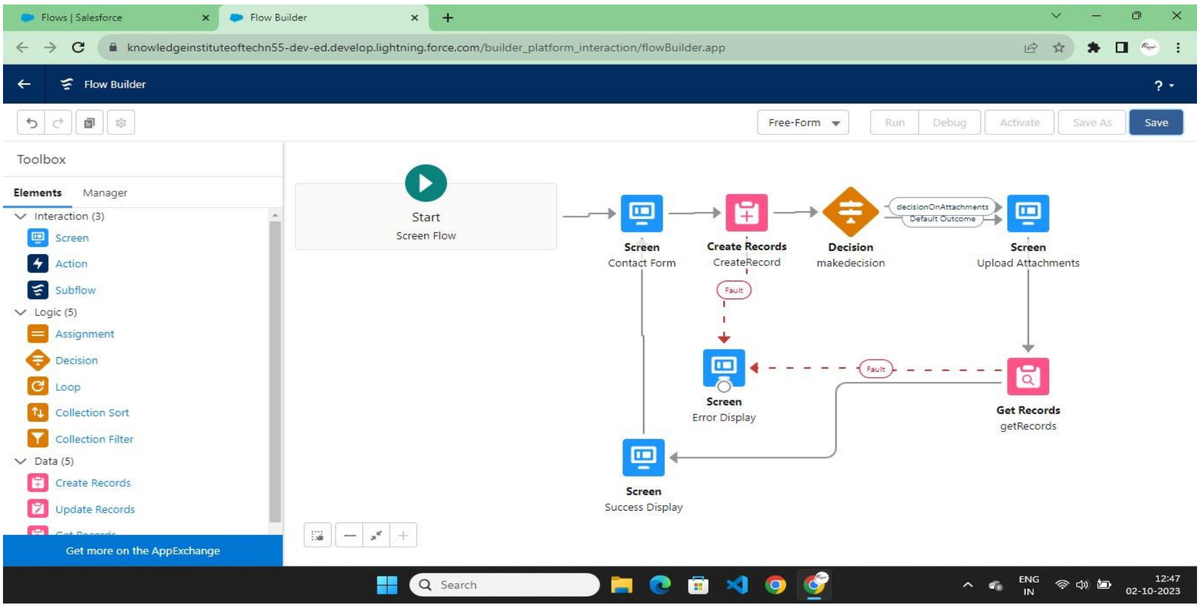
2. Click on the screen element to configure it.

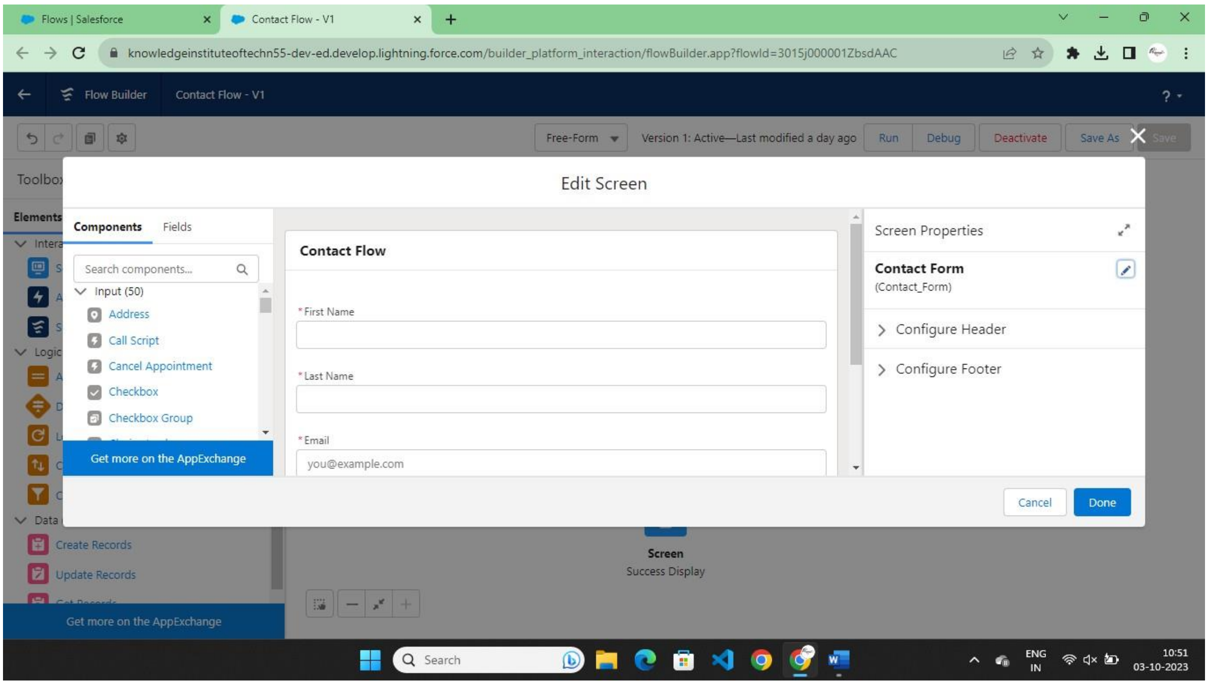
3. Add text and instructions on this screen to inform users about the survey and whatinformation is required.

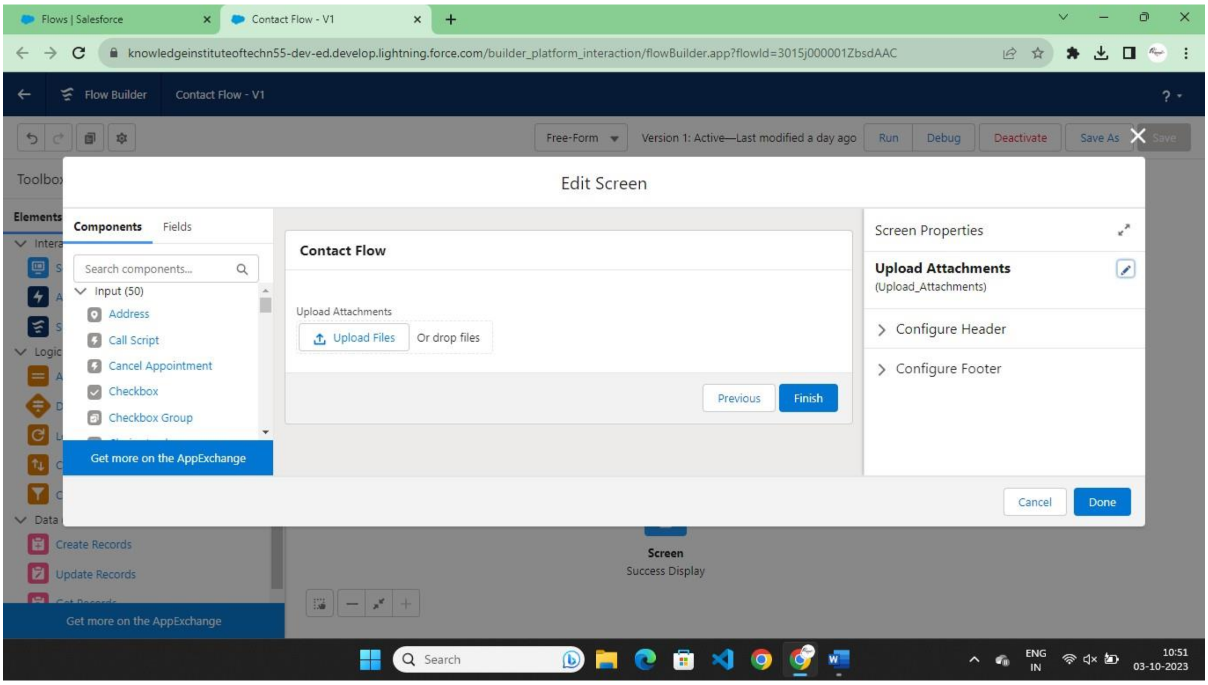
4. Drag and drop the appropriate input elements (e.g., text fields, radio buttons, checkboxes)onto the screen for users to input their survey details. You can find these elements in the
palette on the left.

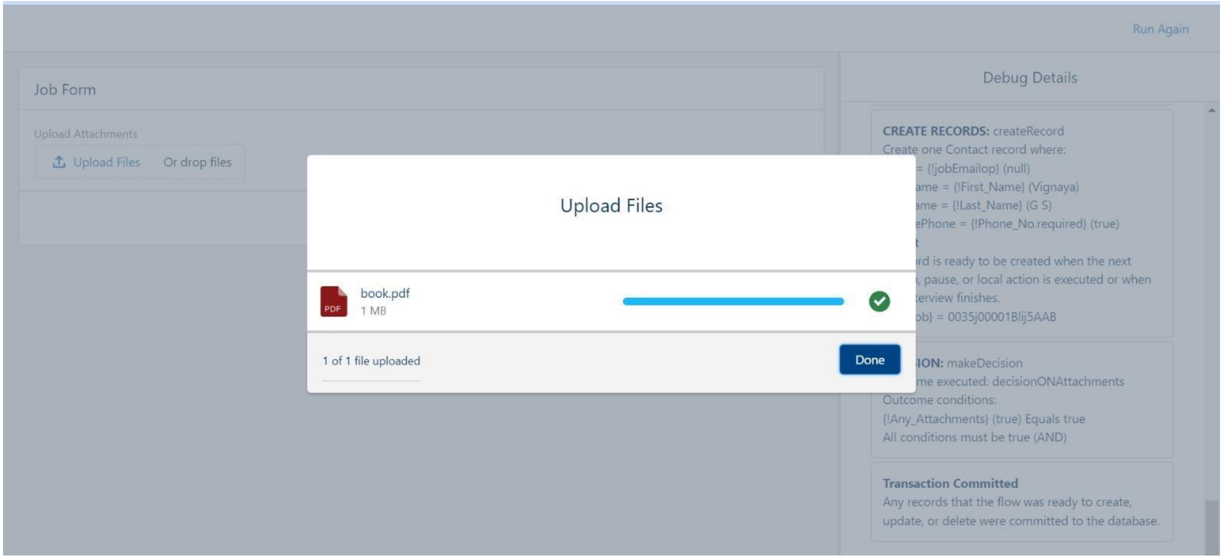
5. Configure each input element with the appropriate labels, help text, and validation rules ifnecessary.

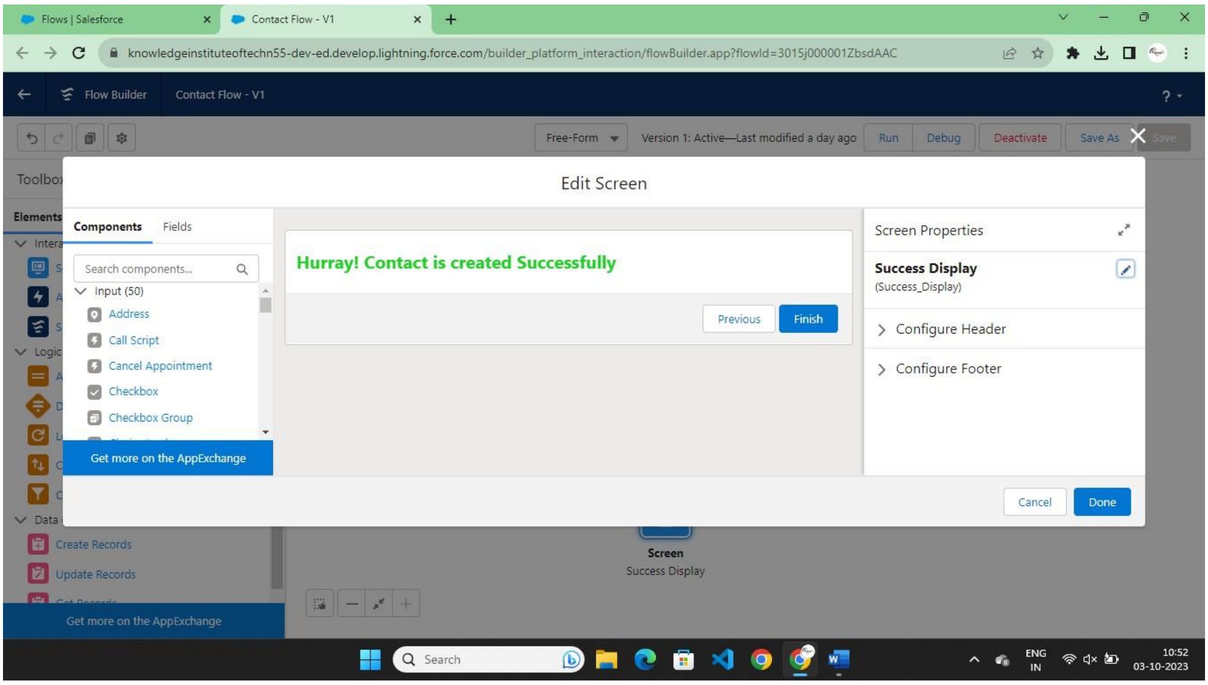

Flows | Salesforce
Contact Flow - V1
knowledgeinstituteoftechn55-dev-ed.develop.lightning.force.com/lightning/setup/Flows/home
Search Setup
Setup
Home
Object Manager
flows
Process Automation
Flows
Identity
Login Flows
Didn't find what you're looking for? Try using Global Search.
SETUP
Flows
Flow Trigger Explorer
New Flow
Flow Definitions
All Flows
35 items • Sorted by Flow Label • Filtered by All flow definitions • Updated a few seconds ago
Flow Label
Process Type
A...
Te...
Package State
P...
Last M...
Last Modified ...
CMS: Withdraw Review Request
Screen Flow
Managed-Installed
Contact Flow
Screen Flow
Unmanaged
VIGNAYA G...
02/10/2023, 12:54 pm
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
Search
ENG
IN
10:51
03-10-2023

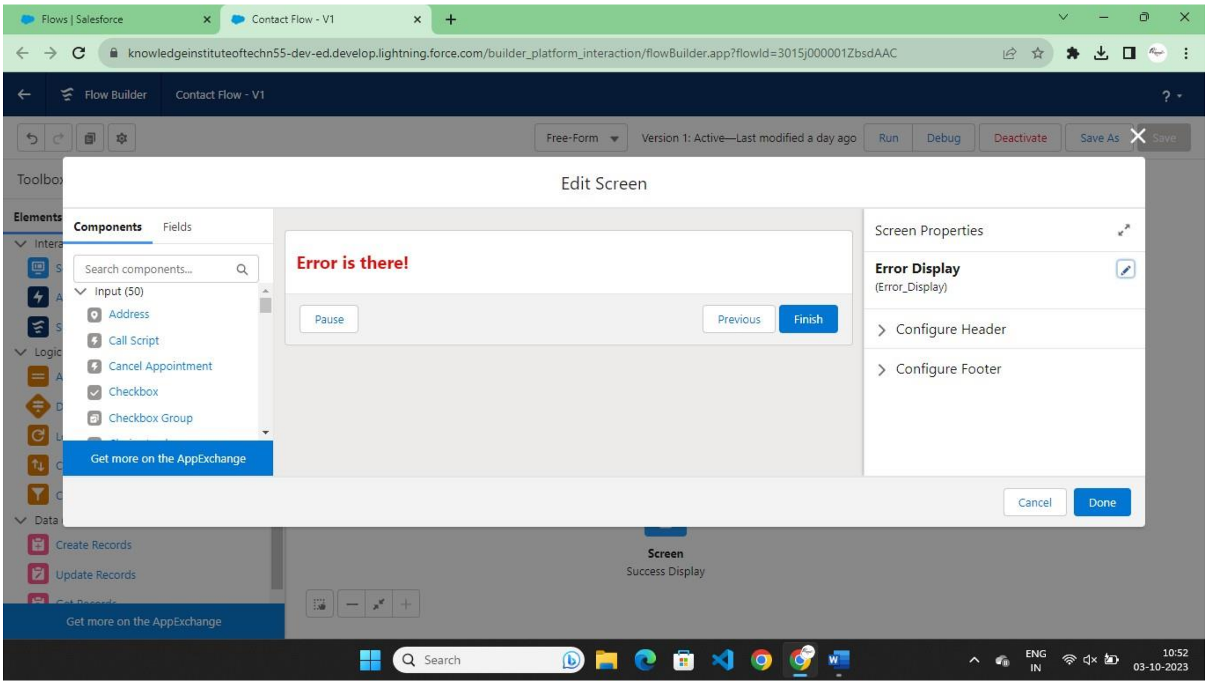

Flows | Salesforce
Flow Builder
knowledgeinstituteoftechn55-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.app
Flow Builder
Free-Form
Run
Debug
Activate
Save As
Save
Toolbox
Elements
Manager
Interaction (3)
Screen
Action
Subflow
Logic (5)
Assignment
Decision
Loop
Collection Sort
Collection Filter
Data (5)
Create Records
Update Records
Get more on the AppExchange
Start
Screen Flow
Screen
Contact Form
Create Records
CreateRecord
Decision
makedecision
decisionOnAttachments
Default Outcome
Screen
Upload Attachments
Fault
Screen
Error Display
Fault
Get Records
getRecords
Screen
Success Display
Search
ENG
IN
12:47
02-10-2023

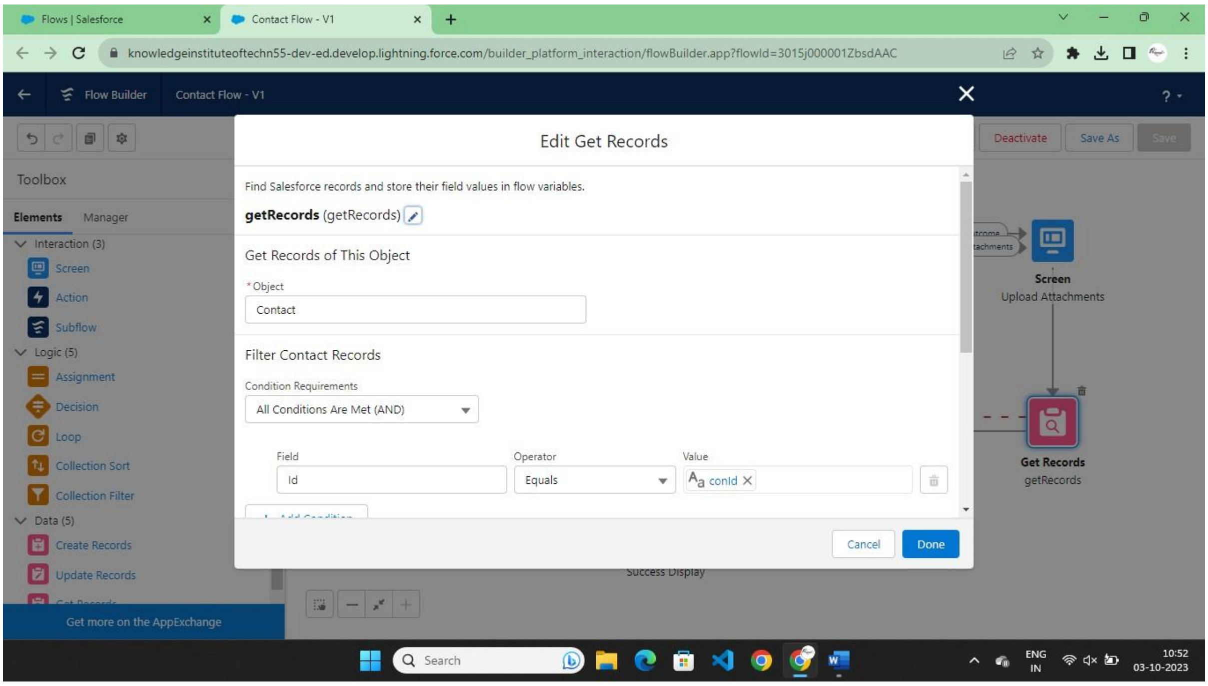

Flows | Salesforce
Contact Flow - V1
knowledgeinstituteoftechn55-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.app?flowId=3015j000001ZbsdAAC
Flow Builder
Contact Flow - V1
Free-Form
Version 1: Active—Last modified a day ago
Run
Debug
Deactivate
Save As
Save
Edit Screen
Components
Fields
Search components...
Input (50)
Address
Call Script
Cancel Appointment
Checkbox
Checkbox Group
Get more on the AppExchange
Contact Flow
* First Name
* Last Name
* Email
you@example.com
Screen Properties
Contact Form
(Contact_Form)
Configure Header
Configure Footer
Cancel
Done
Create Records
Update Records
Screen
Success Display
Search
ENG
IN
10:51
03-10-2023


Flows | Salesforce
Contact Flow - V1
knowledgeinstituteoftechn55-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.app?flowId=3015j000001ZbsdAAC
Flow Builder
Contact Flow - V1
Free-Form
Version 1: Active—Last modified a day ago
Run
Debug
Deactivate
Save As
Save
Edit Screen
Components
Fields
Search components...
Input (50)
Address
Call Script
Cancel Appointment
Checkbox
Checkbox Group
Get more on the AppExchange
Contact Flow
Upload Attachments
Upload Files
Or drop files
Previous
Finish
Screen Properties
Upload Attachments
(Upload_Attachments)
Configure Header
Configure Footer
Cancel
Done
Create Records
Update Records
Screen
Success Display
Search
ENG
IN
10:51
03-10-2023


Run Again
Job Form
Upload Attachments
Upload Files
Or drop files
Debug Details
CREATE RECORDS: createRecord
Create one Contact record where:
Upload Files
book.pdf
1 MB
1 of 1 file uploaded
Done
Outcome conditions:
{!Any_Attachments} (true) Equals true
All conditions must be true (AND)
Transaction Committed
Any records that the flow was ready to create, update, or delete were committed to the database.

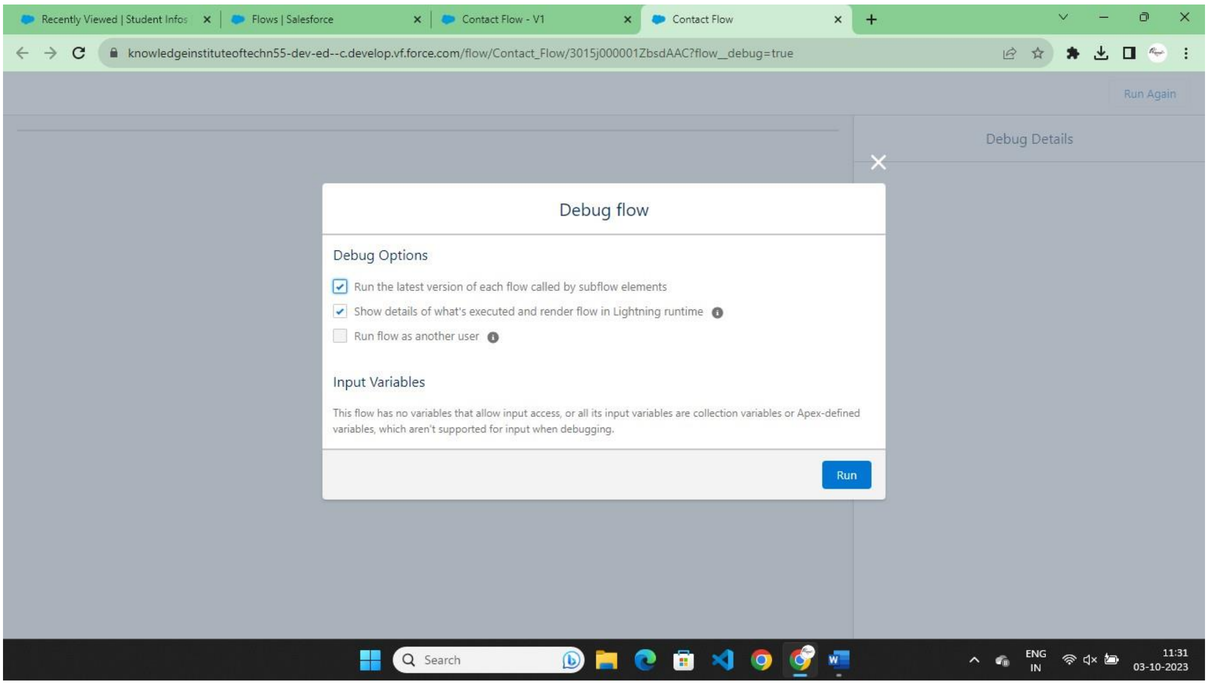

Flows | Salesforce
Contact Flow - V1
knowledgeinstituteoftechn55-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.app?flowId=3015j000001ZbsdAAC
Flow Builder
Contact Flow - V1
Free-Form
Version 1: Active—Last modified a day ago
Run
Debug
Deactivate
Save As
Save
Edit Screen
Components
Fields
Search components...
Input (50)
Address
Call Script
Cancel Appointment
Checkbox
Checkbox Group
Get more on the AppExchange
Hurray! Contact is created Successfully
Previous
Finish
Screen Properties
Success Display
(Success_Display)
Configure Header
Configure Footer
Cancel
Done
Create Records
Update Records
Screen
Success Display
Get more on the AppExchange
Search
ENG
IN
10:52
03-10-2023



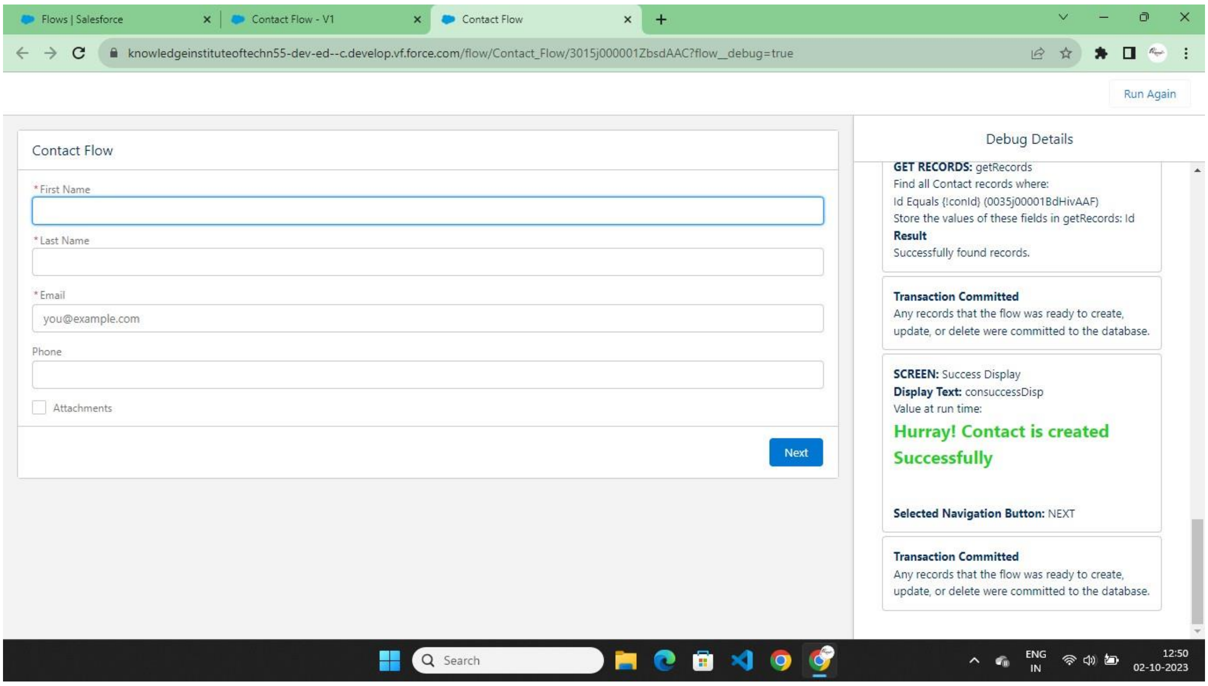


Step 4: Create Variables

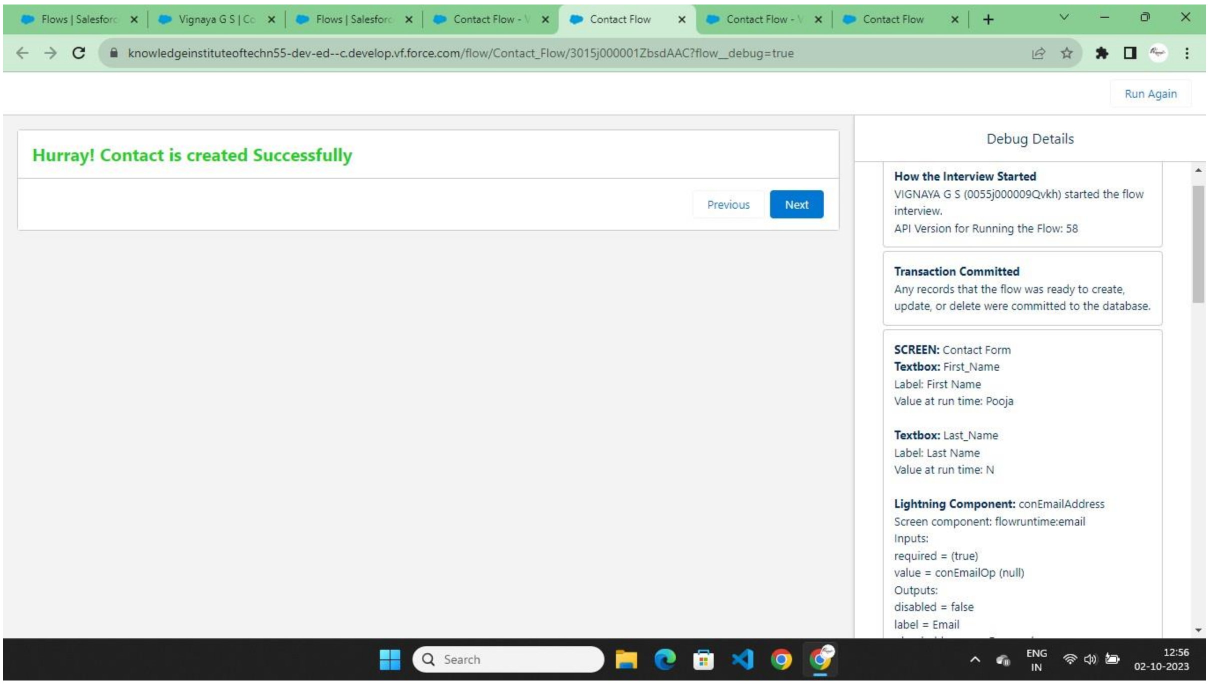
1. If you want to capture and store the survey data, you need to create variables to holdthe data. To do this, click on the "Manager" tab in the palette and create variables foreach field on the screen. Make sure the variable types match the data types of the corresponding fields.



Debug flow
Debug Options
Run the latest version of each flow called by subflow elements
Show details of what's executed and render flow in Lightning runtime
Run flow as another user
Input Variables
This flow has no variables that allow input access, or all its input variables are collection variables or Apex-defined variables, which aren't supported for input when debugging.
Run
Debug Details
Run Again



Contact Flow
* First Name
* Last Name
* Email
you@example.com
Phone
Attachments
Next
Debug Details
GET RECORDS: getRecords
Find all Contact records where:
Id Equals {!conId} (0035j00001BdHivAAF)
Store the values of these fields in getRecords: Id
Result
Successfully found records.
Transaction Committed
Any records that the flow was ready to create, update, or delete were committed to the database.
SCREEN: Success Display
Display Text: consuccessDisp
Value at run time:
Hurray! Contact is created Successfully
Selected Navigation Button: NEXT
Transaction Committed
Any records that the flow was ready to create, update, or delete were committed to the database.
Run Again



Step 7: Create a Finish Screen

Add a final screen where you can thank the user for completing the survey and provide anynecessary 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.