NAAN MUDHALVAN

ASSIGNMENT

on

[SALESFORCE]

IMPLEMENTING CRM FOR RESULT TRACKING OF A CANDIDATE WITH INTERNAL MARKS

NAME – AJI KUMAR P S

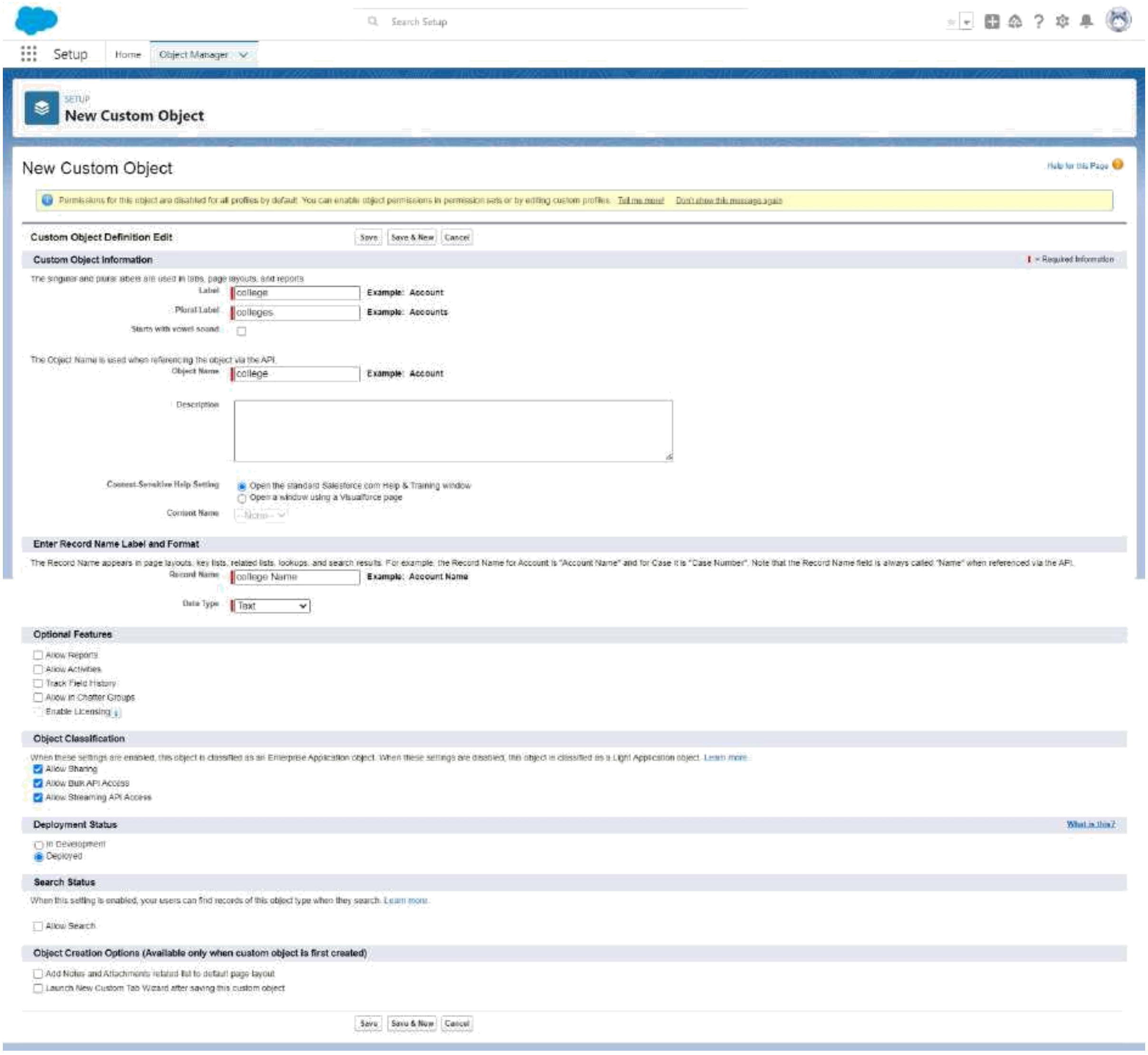
NM ID -

8765C6504095F9397BF4236443B9B0AA

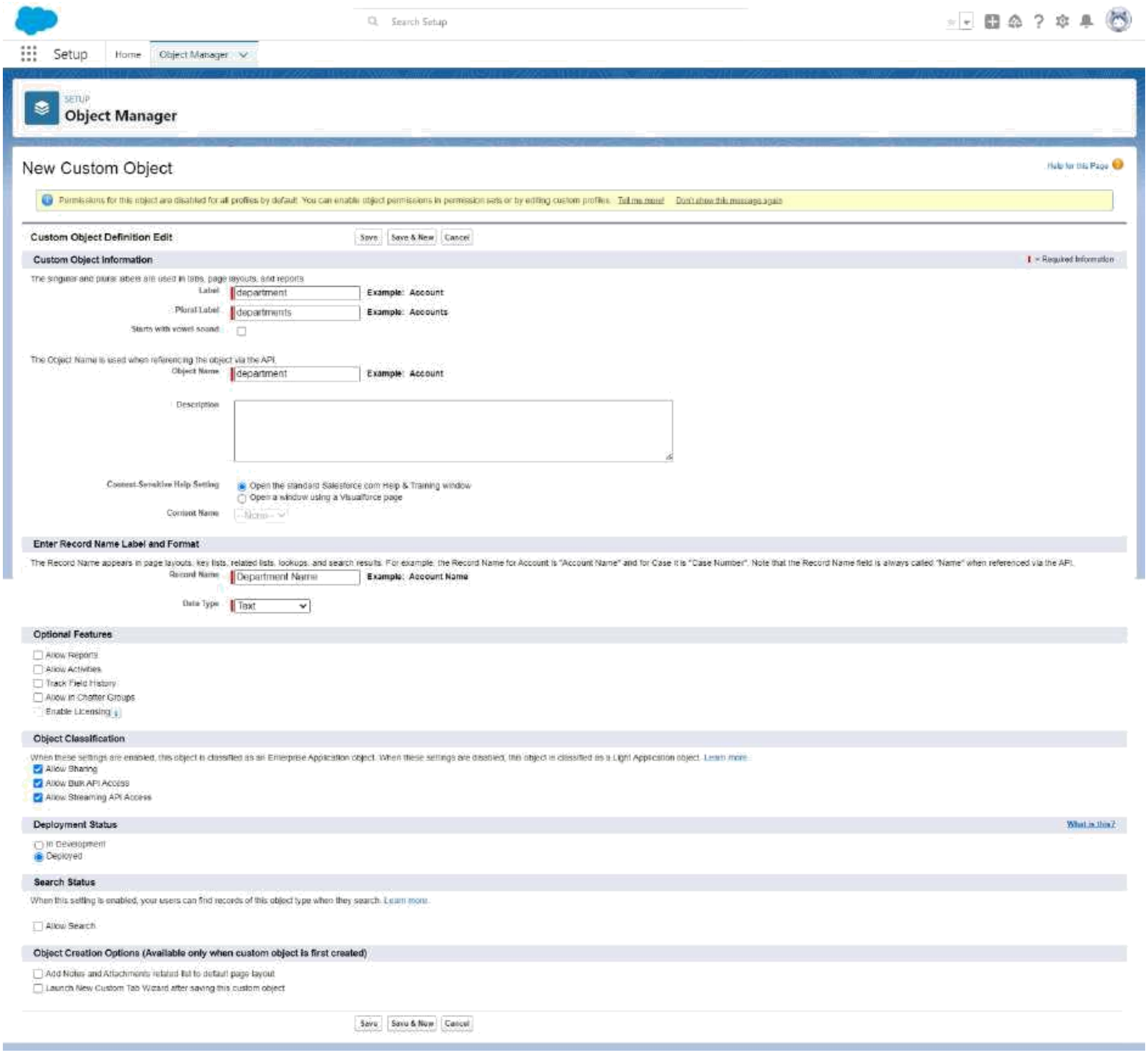
1.Create a Master-Detail Relationship between two Custom objects and also create a Roll Up Summary Field to Calculate total number of records.

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"



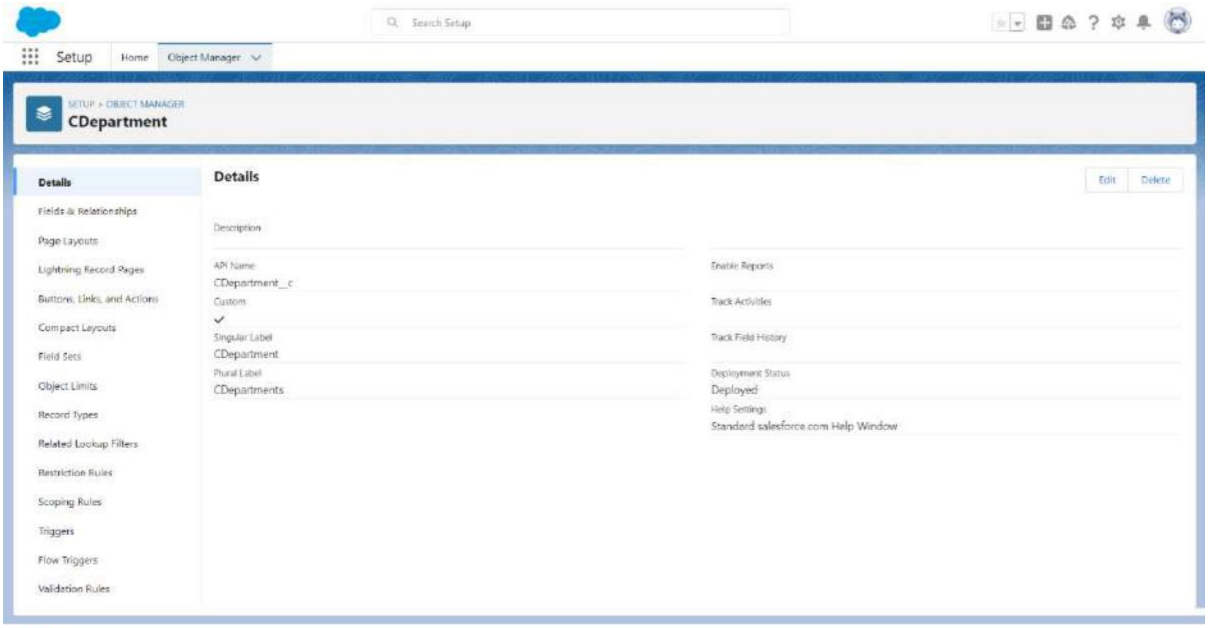
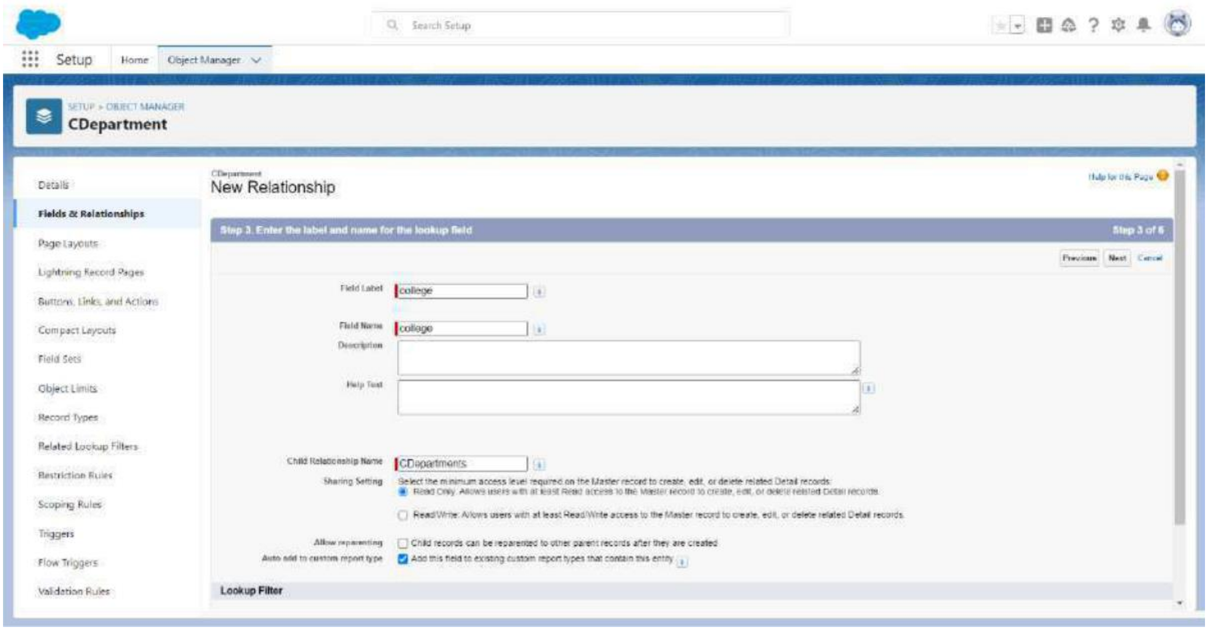
Step 2: Create a Master-Detail Relationship

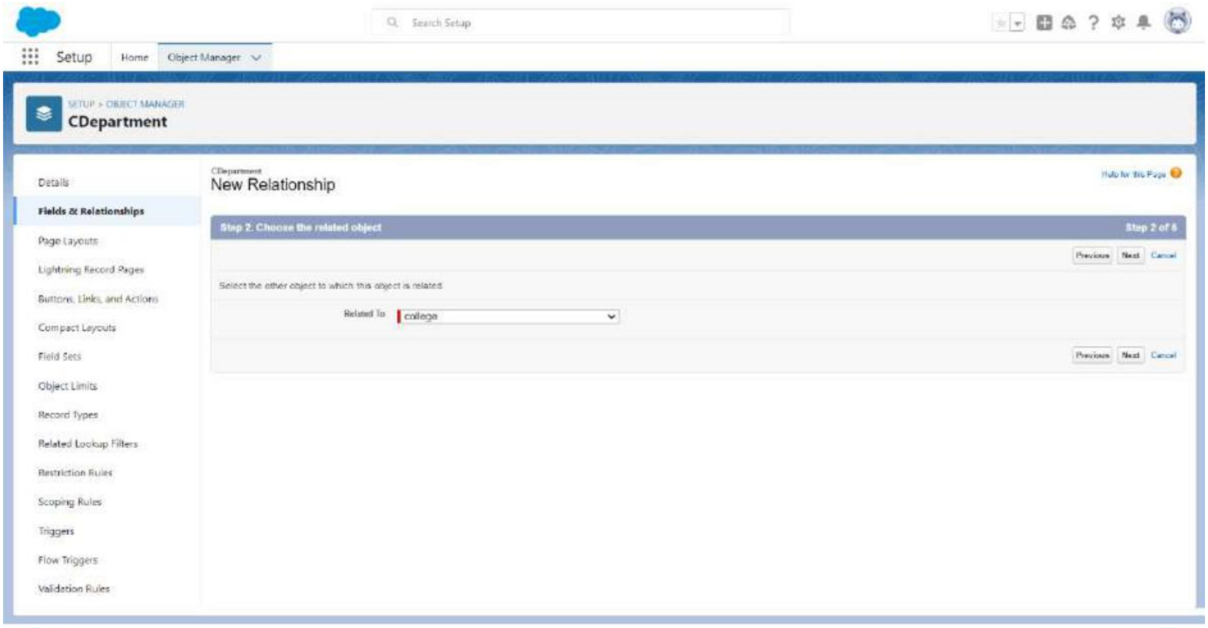
To create a Master-Detail relationship between these two custom objects, follow these steps:

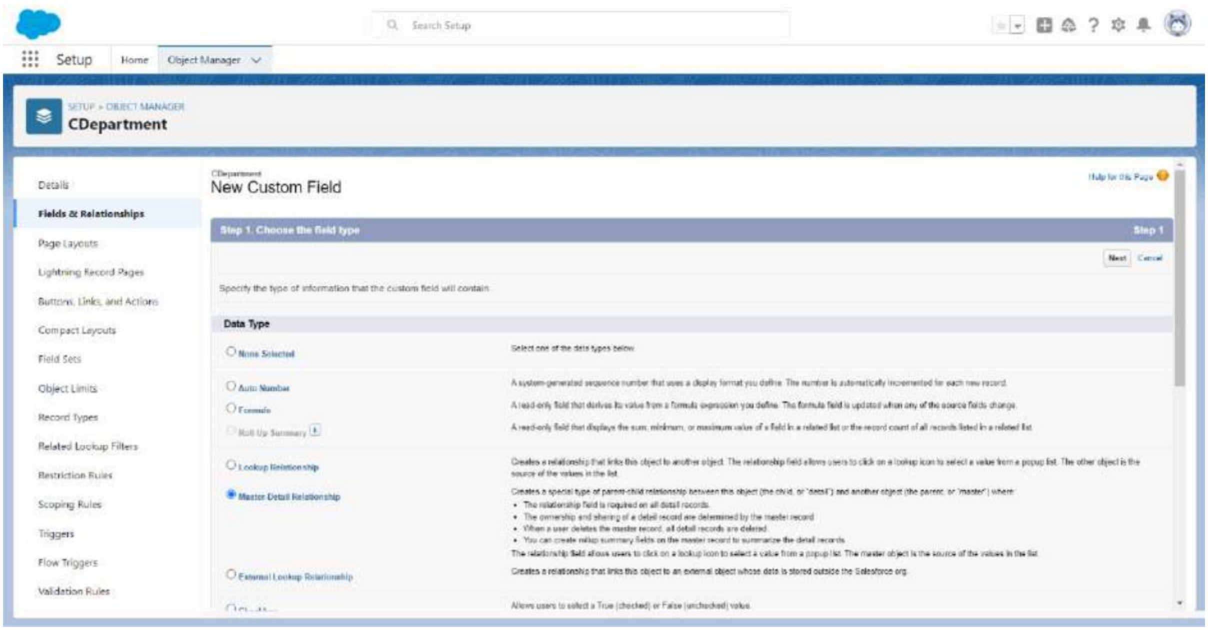
1. Go to Setup > Object Manager.
2. Click on "College__c" to open its settings.
3. In the left sidebar, click on "Fields & Relationships."

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
Details
Edit
Delete
Description
API Name
CDepartment__c
Custom
Singular Label
CDepartment
Plural Label
CDepartments
Enable Reports
Track Activities
Track Field History
Deployment Status
Deployed
Help Settings
Standard salesforce.com Help Window

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 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





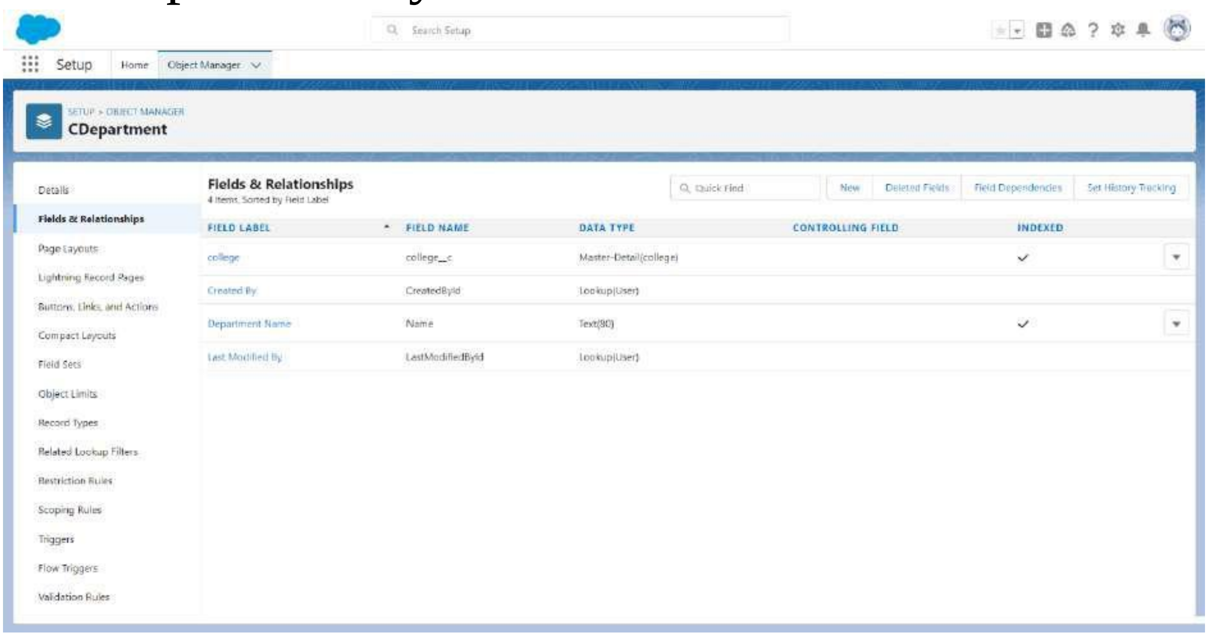
Step 3: Create the Roll-Up Summary Field

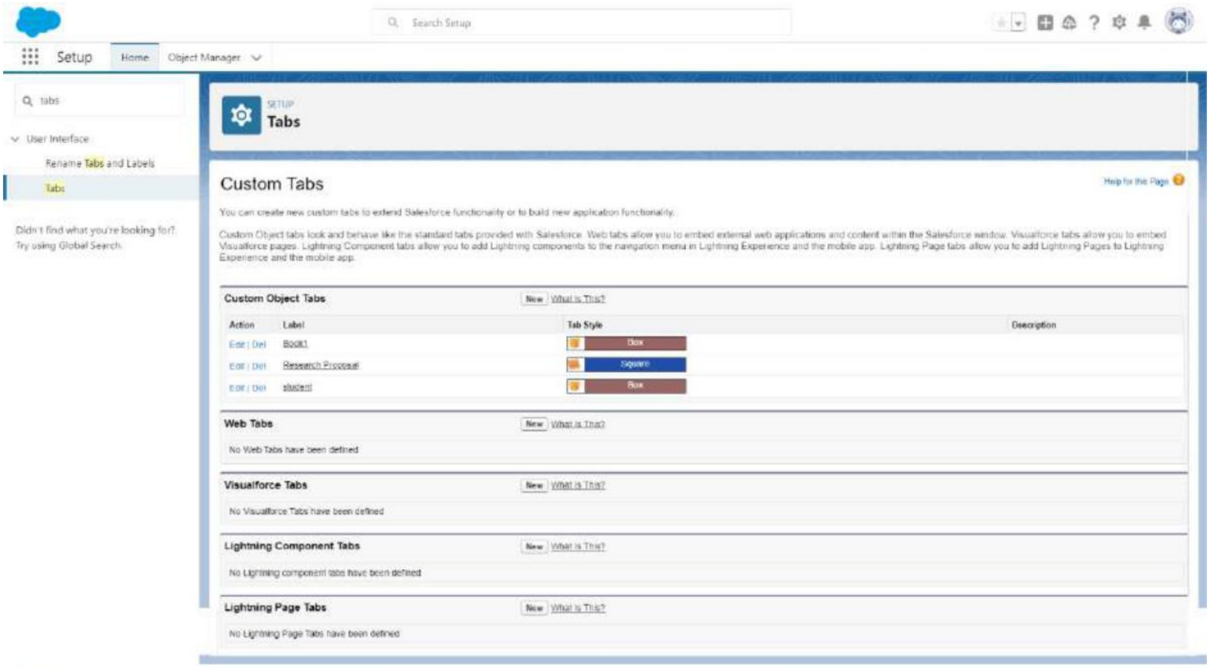
Now, let's create a Roll-Up Summary Field on the "College_C" to calculate the total number of related records in "Department__C":

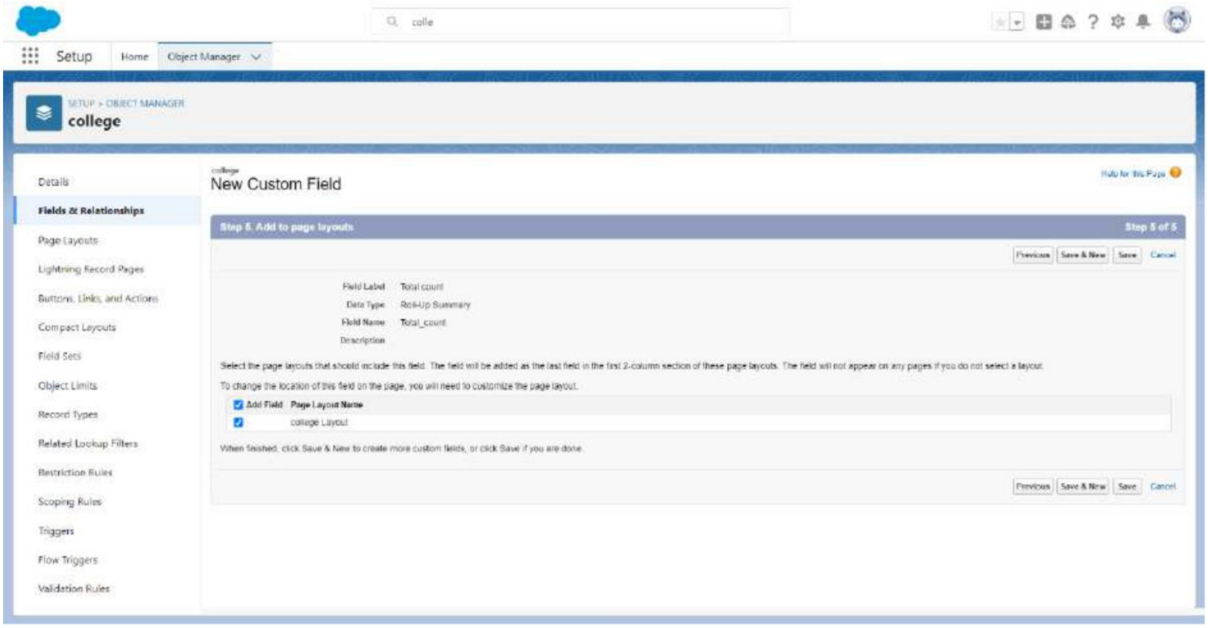
1. Still on the "College__c" settings, go to "Fields & Relationships."

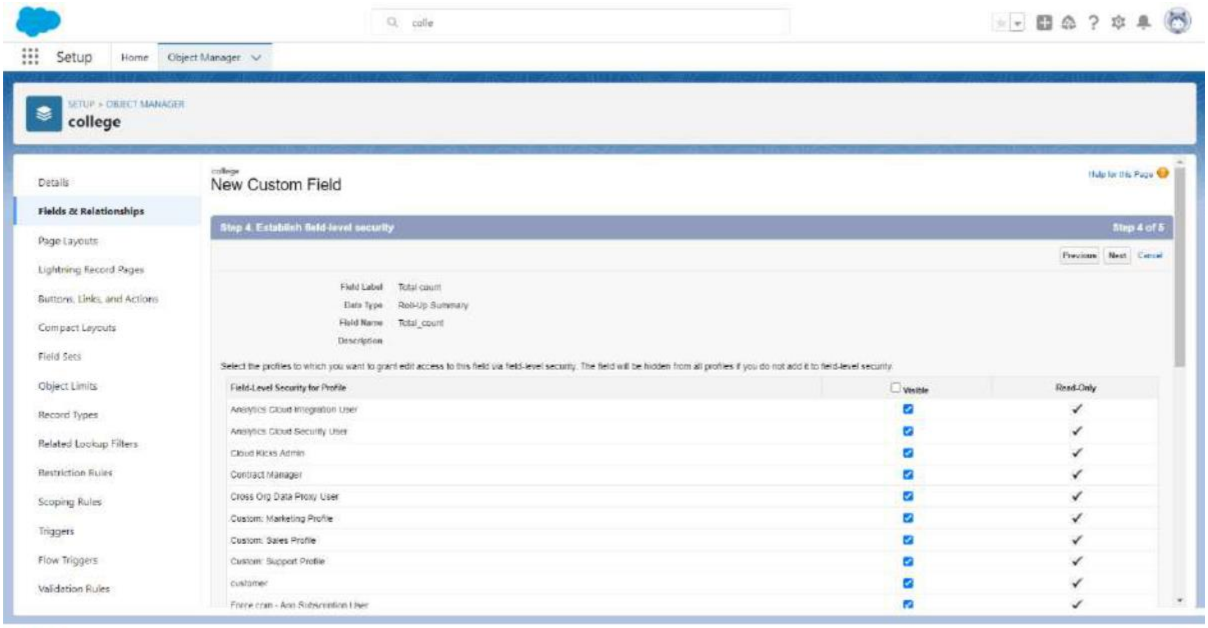
2. Click the "New" button to create a new custom field.
3. Choose "Roll-Up Summary" as the data type.
4. Enter a label for the field, e.g.,
5. Choose "Count" as the Roll-Up Type.
6. Select " Department__c" as the object to roll up information from.
7. Specify the filter criteria if you want to filter 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.

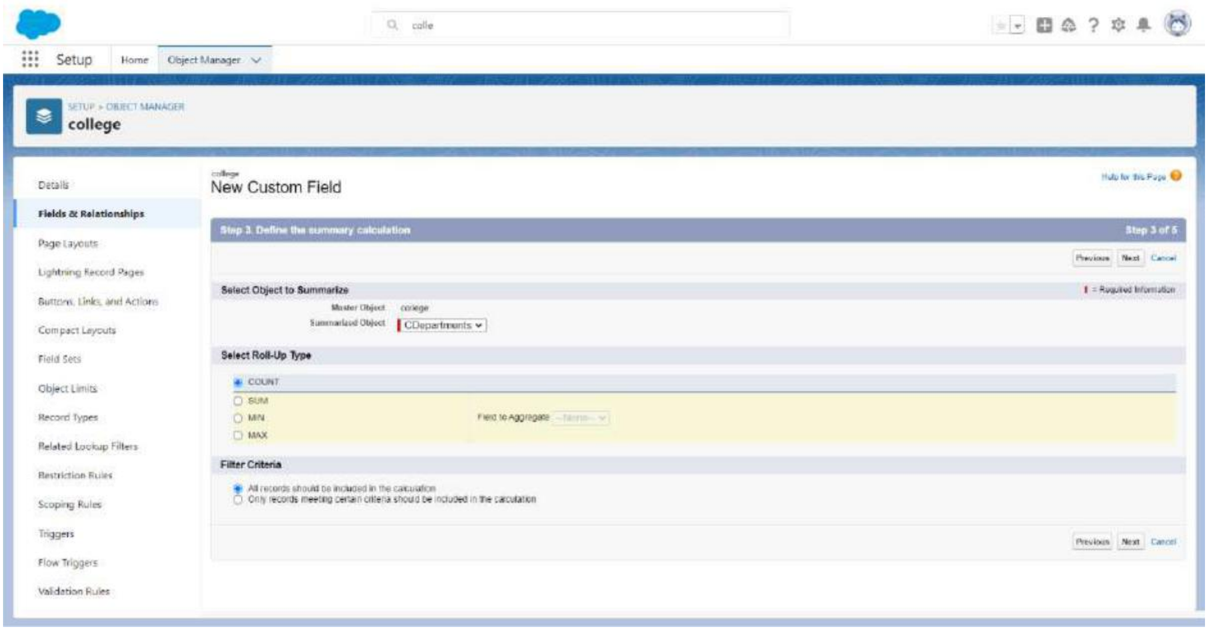



Search Setup
Setup
Home
Object Manager
tabs
User Interface
Rename Tabs and Labels
Tabs
Didn't find what you're looking for? Try using Global Search.
SETUP
Tabs
Custom Tabs
Help for this Page
You can create new custom tabs to extend Salesforce functionality or to build new application functionality.
Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.
Custom Object Tabs
New
What Is This?
Action
Label
Tab Style
Description
Edit | Del
Book1
Box
Edit | Del
Research Proposal
Square
Edit | Del
student
Box
Web Tabs
No Web Tabs have been defined
Visualforce Tabs
No Visualforce Tabs have been defined
Lightning Component Tabs
No Lightning component tabs have been defined
Lightning Page Tabs
No Lightning Page Tabs have been defined

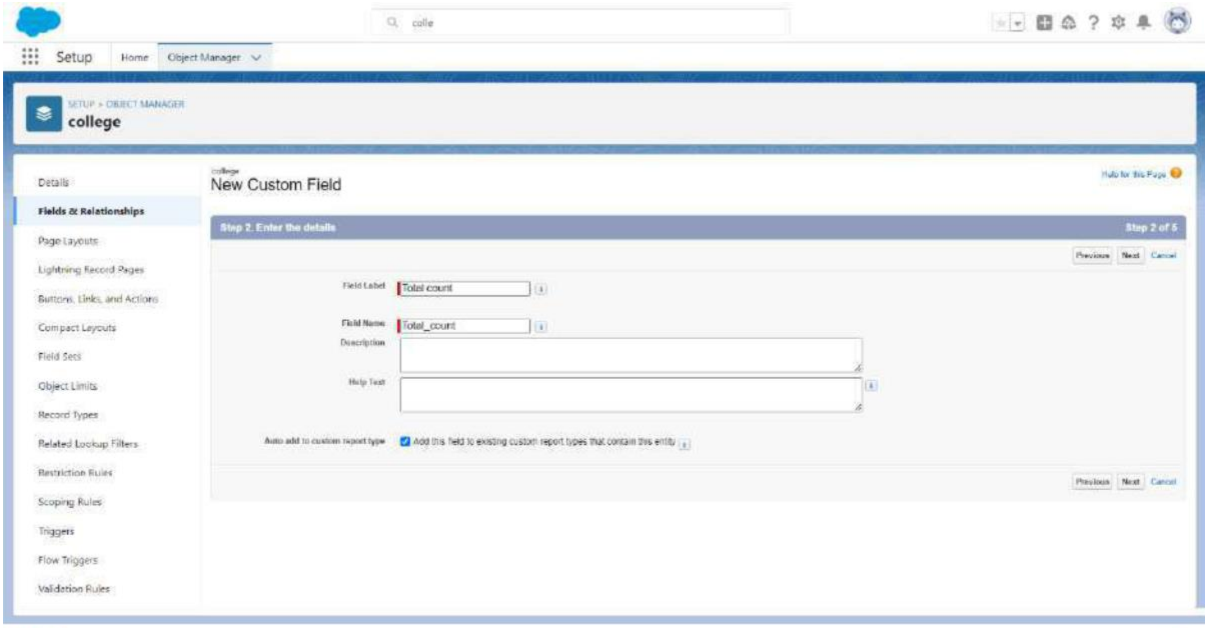
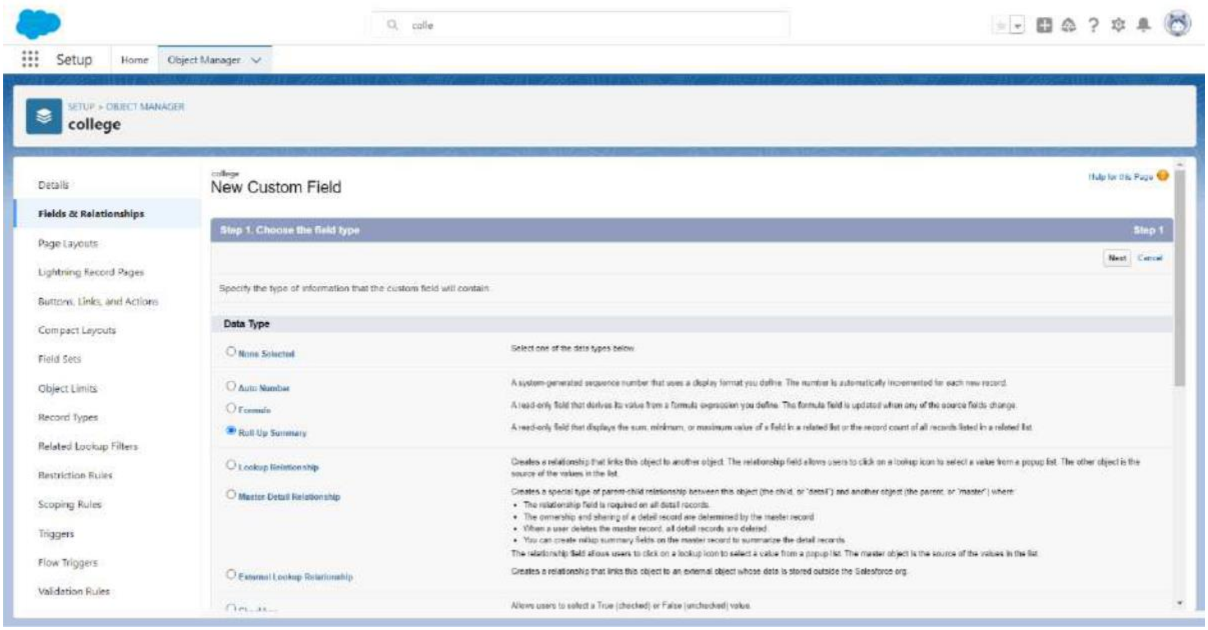

colle
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
college
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Triggers
Flow Triggers
Validation Rules
college
New Custom Field
Help for this Page
Step 5. Add to page layouts
Step 5 of 5
Previous
Save & New
Save
Cancel
Field Label
Total count
Data Type
Roll-Up Summary
Field Name
Total_count
Description
Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.
To change the location of this field on the page, you will need to customize the page layout.
Add Field
Page Layout Name
college Layout
When finished, click Save & New to create more custom fields, or click Save if you are done.

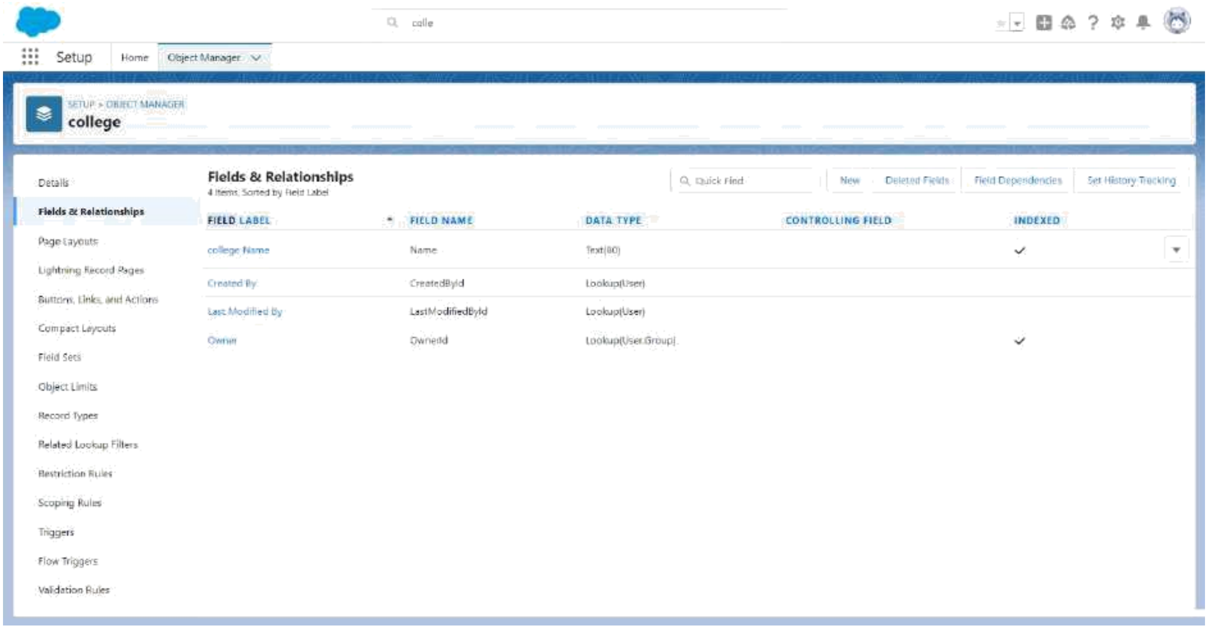


Setup
Home
Object Manager
SETUP > OBJECT MANAGER
college
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Triggers
Flow Triggers
Validation Rules
New Custom Field
Step 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
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



Setup
Home
Object Manager
SETUP > OBJECT MANAGER
college
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 3. Define the summary calculation
Step 3 of 5
Previous
Next
Cancel
Select Object to Summarize
= Required Information
Master Object college
Summarized Object CDepartments
Select Roll-Up Type
COUNT
SUM
MIN
MAX
Field to Aggregate
Filter Criteria
All records should be included in the calculation
Only records meeting certain criteria should be included in the calculation
Previous
Next
Cancel


Setup
Home
Object Manager
SETUP > OBJECT MANAGER
college
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 2. Enter the details
Step 2 of 5
Previous
Next
Cancel
Field Label
Total count
Field Name
Total_count
Description
Help Text
Auto add to custom report type
Add this field to existing custom report types that contain this entity

Setup
Home
Object Manager
SETUP > OBJECT MANAGER
college
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
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
Formula
Roll-Up Summary
Lookup Relationship
Master-Detail Relationship
External Lookup Relationship

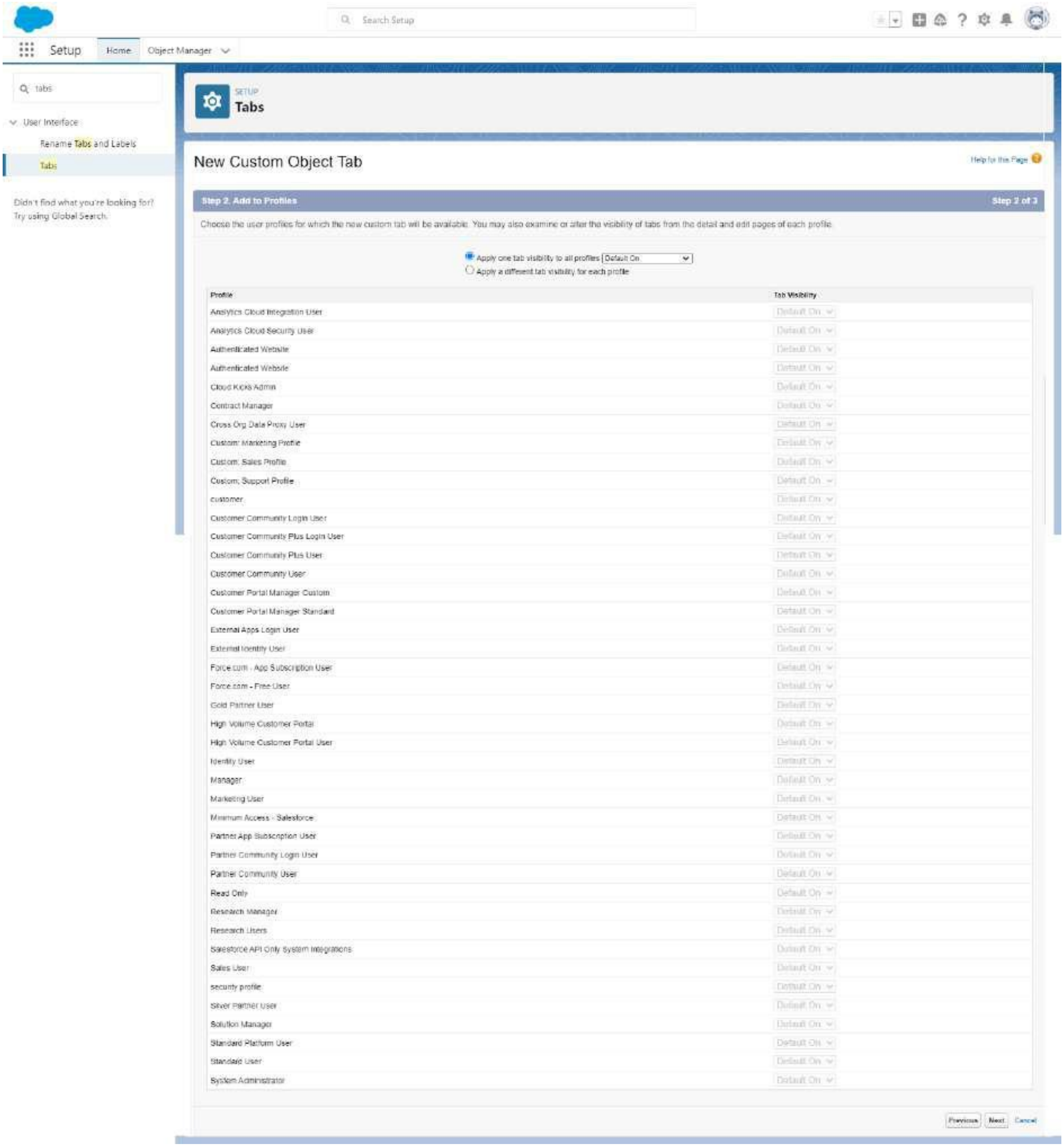


Step 4: Create a Lightning App

1. Type and select "App Manager."
2. Click "New Lightning App."
3. Fill in basic information (Name, Developer Name, Description).
4. Choose the App Type (Standard, Console, Custom).
5. Customize the Logo and Colour Scheme.
6. Configure Navigation Items (objects to appear in the app's menu).
7. Set the App Visibility (default access).
8. Optionally, choose Record Pages (Lightning Record Pages).
9. Review and Save the app.

10.Assign the app to users or profiles.

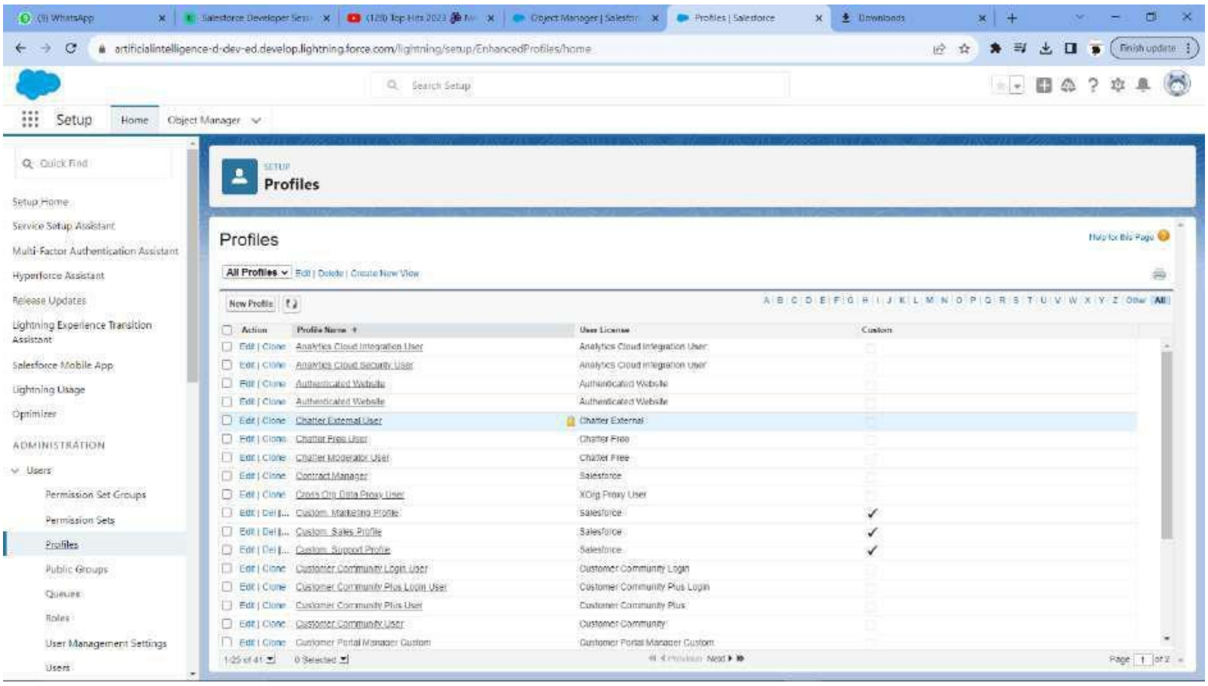
11.Test the app with the assigned users.

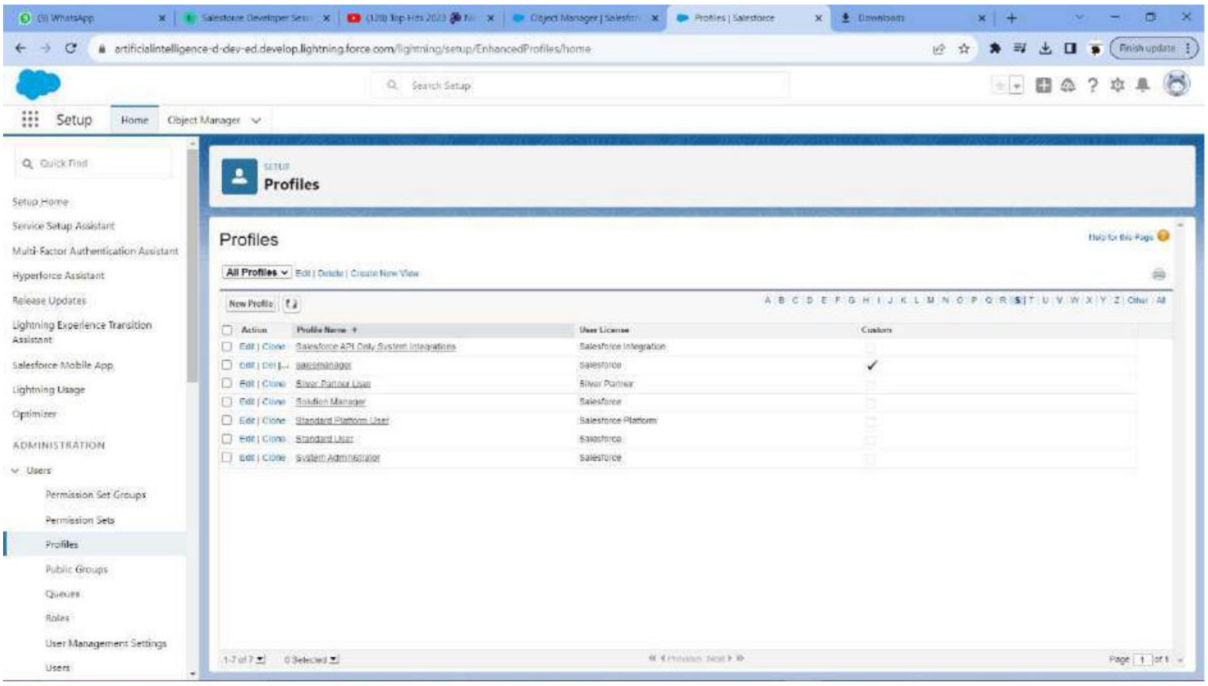
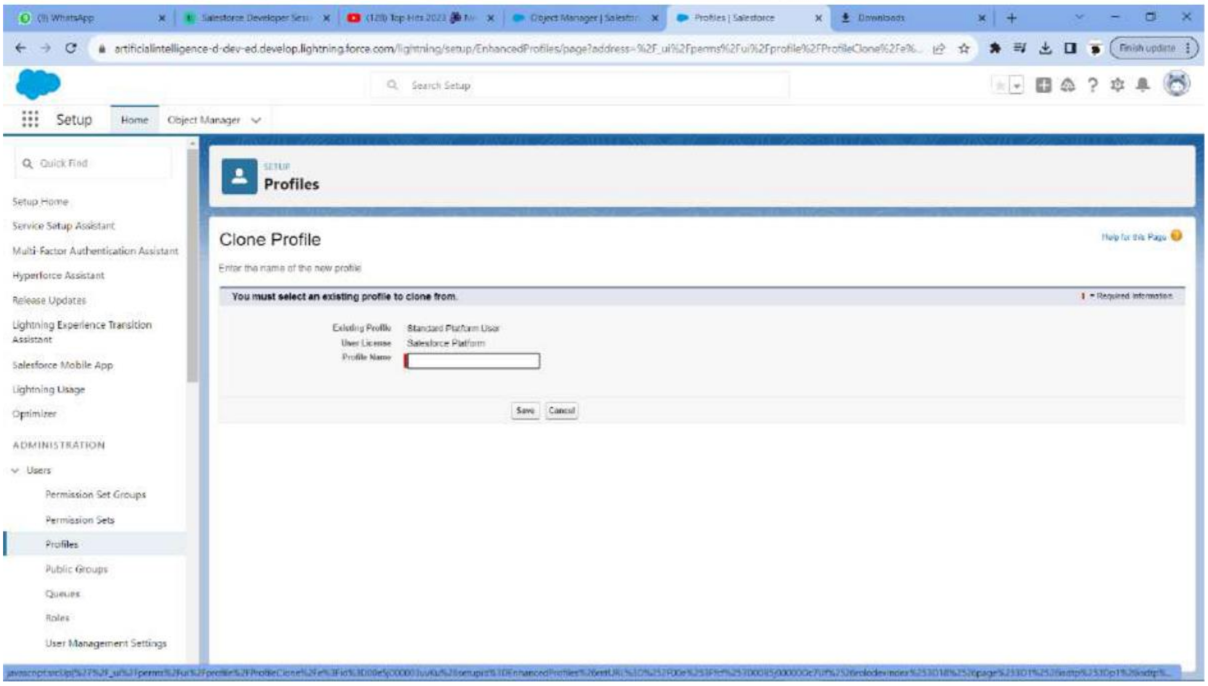


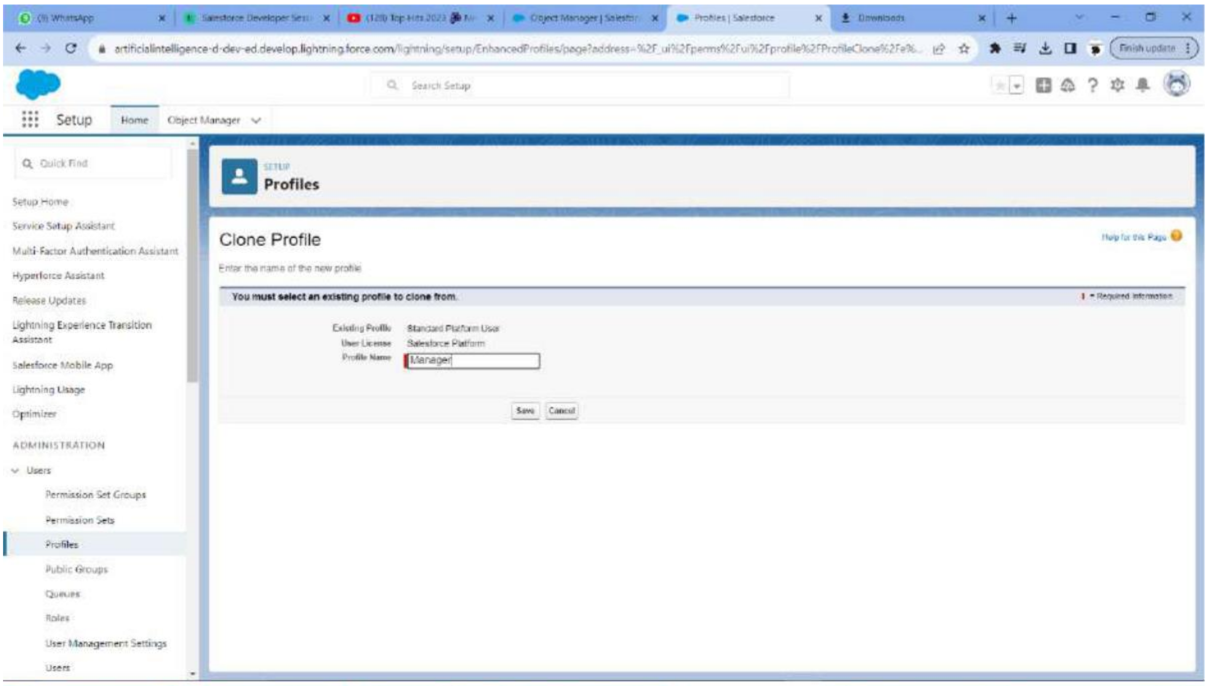
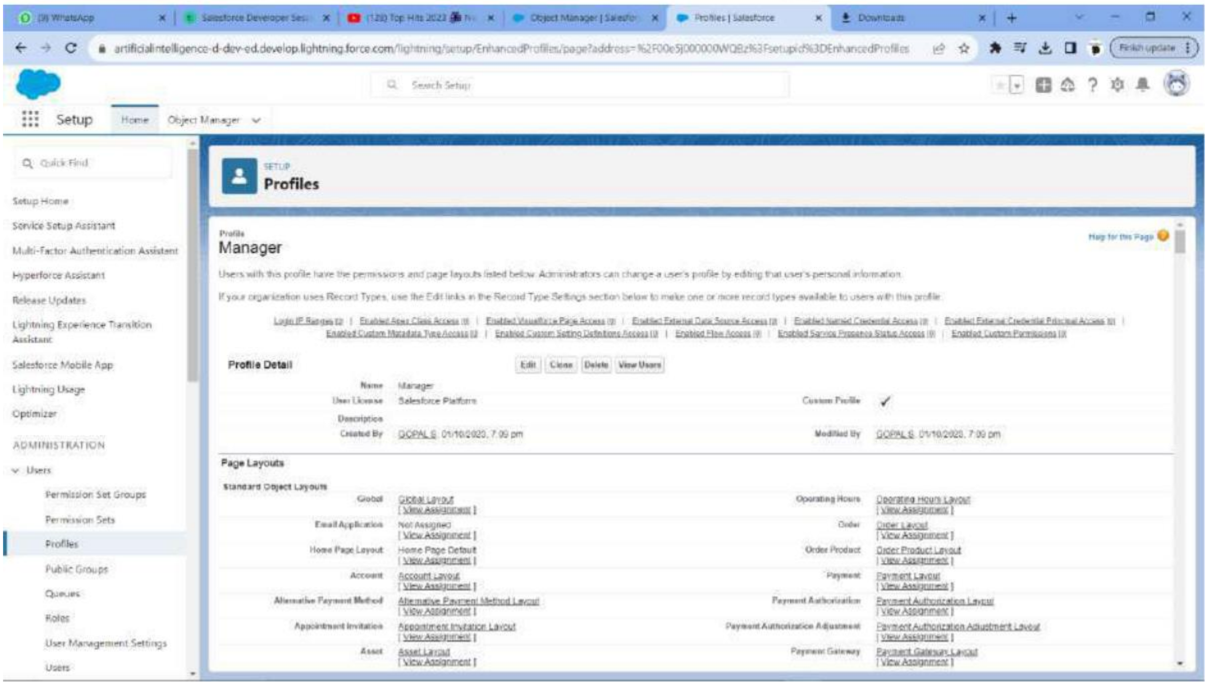
2. If there is 2 user, User A and User B in the organisation and we want in Account object that User A should not see the User B Record and user B should not see User A record then apply the Security for the users.

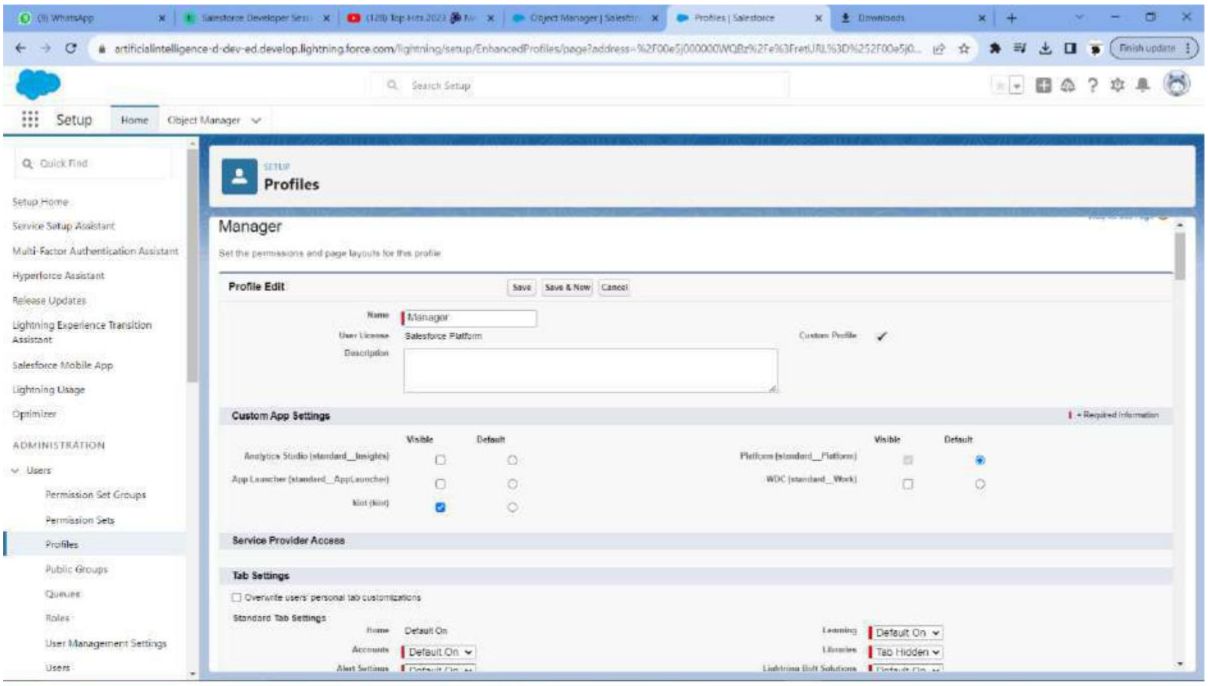
Solution:

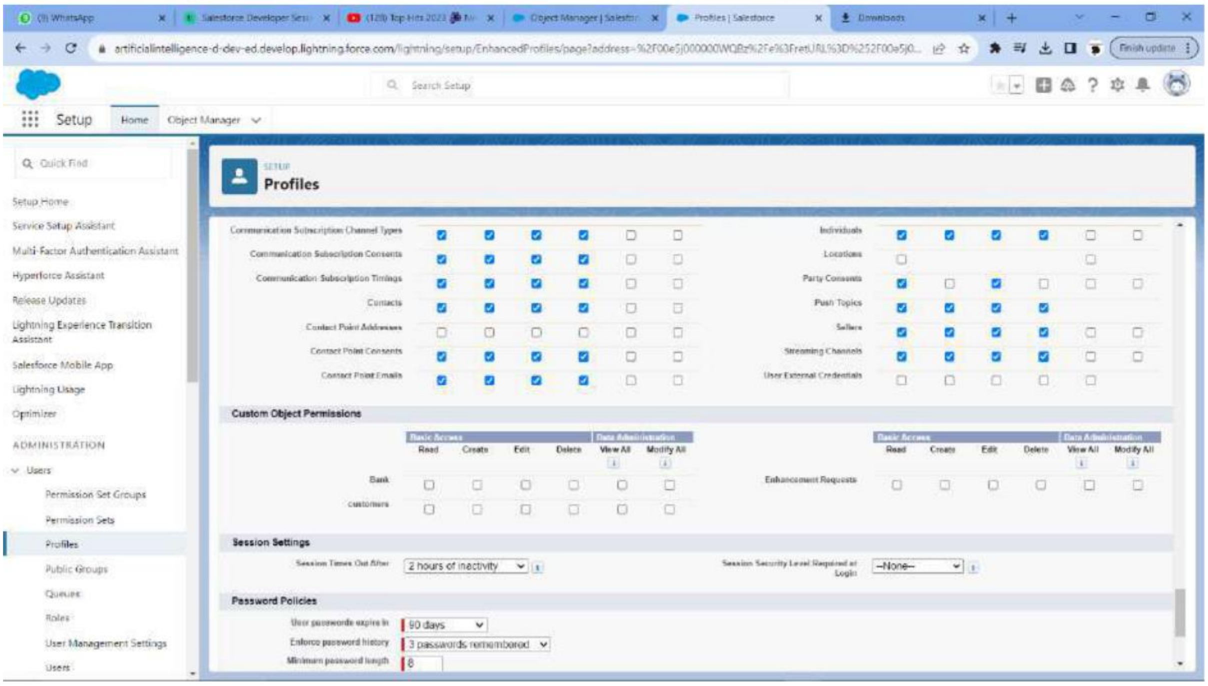
Step 1: Create two separate custom profiles, one for User A and one for User B.

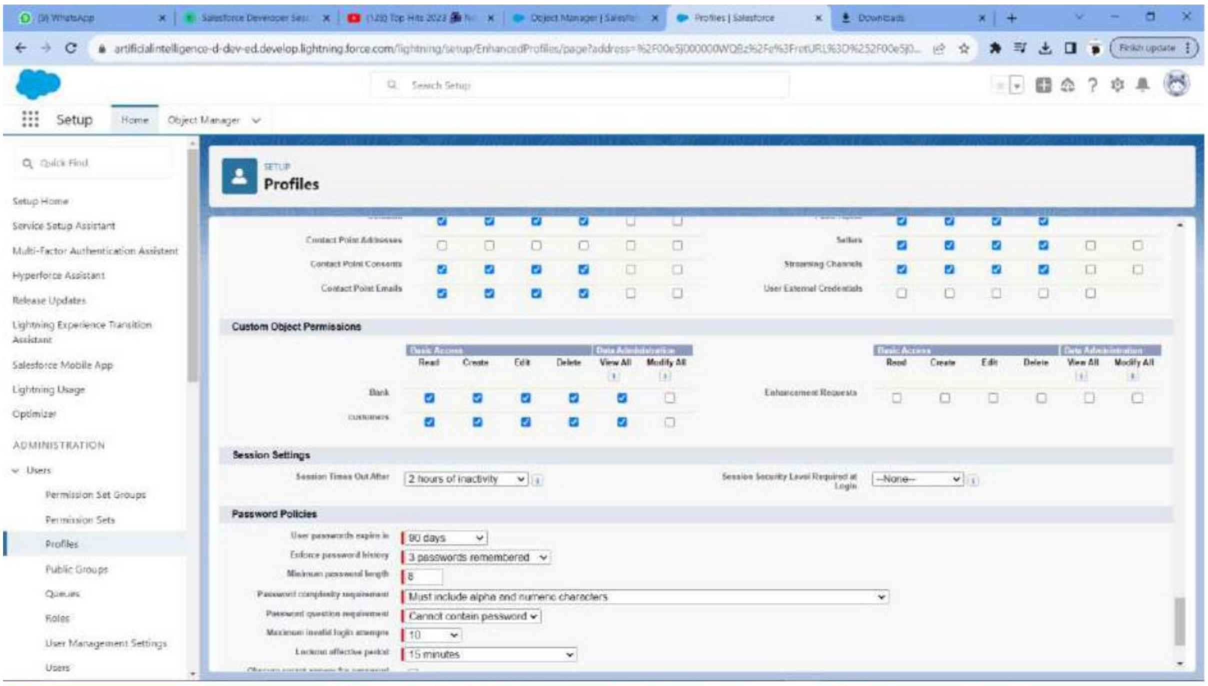


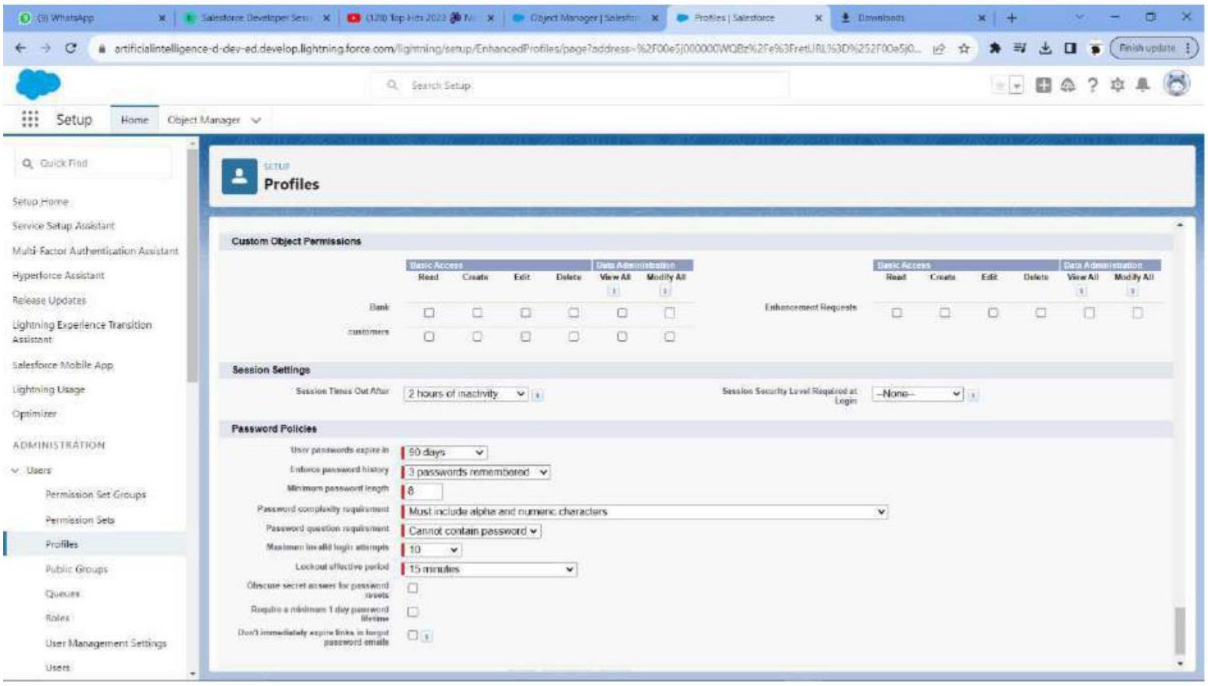

Setup
Home
Object Manager
Profiles
Profiles
All Profiles
New Profile
Action
Profile Name
User License
Custom
Edit | Clone Salesforce API Only System Integrations Salesforce Integration
Edit | Del | salesmanager Salesforce
Edit | Clone Silver Partner User Silver Partner
Edit | Clone Solution Manager Salesforce
Edit | Clone Standard Platform User Salesforce Platform
Edit | Clone Standard User Salesforce
Edit | Clone System Administrator Salesforce
Setup Home
Service Setup Assistant
Multi-Factor Authentication Assistant
Hyperforce Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users

Setup
Home
Object Manager
Profiles
Clone Profile
Enter the name of the new profile
You must select an existing profile to clone from.
Existing Profile Standard Platform User
User License Salesforce Platform
Profile Name
Save
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

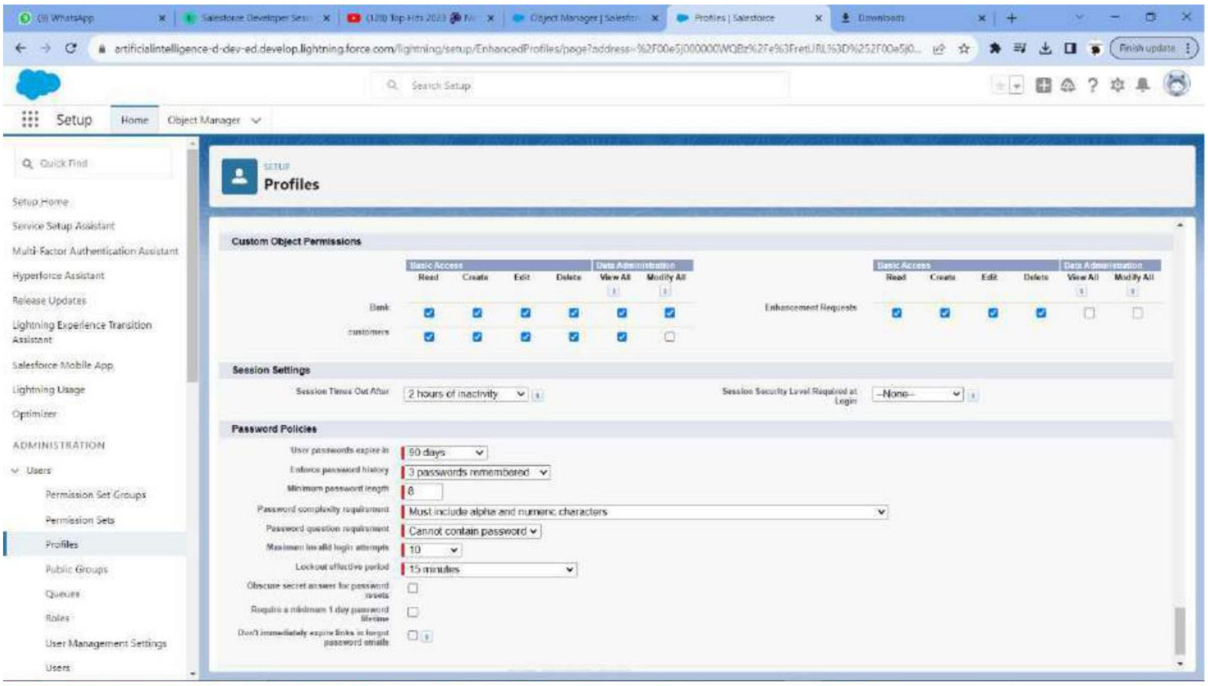

Setup
Home
Object Manager
Quick Find
Setup Home
Service Setup Assistant
Multi-Factor Authentication Assistant
Hyperforce Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
SETUP
Profiles
Clone Profile
Enter the name of the new profile
You must select an existing profile to clone from.
Existing Profile Standard Platform User
User License Salesforce Platform
Profile Name Manager
Save
Cancel

SETUP
Profiles
Profile
Manager
Profile Detail
Edit
Clone
Delete
View Users
Name Manager
User License Salesforce Platform
Custom Profile
Description
Created By
Modified By
Page Layouts
Standard Object Layouts
Global
Global Layout
Email Application
Not Assigned
Home Page Layout
Home Page Default
Account
Account Layout
Asset
Asset Layout
Operating Hours
Operating Hours Layout
Order
Order Layout
Order Product
Order Product Layout
Payment
Payment Layout
Payment Authorization
Payment Authorization Layout
Payment Gateway
Payment Gateway Layout
[View Assignment]


Setup
Home
Object Manager
Profiles
Manager
Profile Edit
Save
Save & New
Cancel
Name
Manager
Salesforce Platform
Custom App Settings
Visible
Default
Service Provider Access
Tab Settings
Standard Tab Settings
Default On
Tab Hidden
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users


Setup
Home
Object Manager
Profiles
Custom Object Permissions
Basic Access
Data Administration
Read
Create
Edit
Delete
View All
Modify All
Bank
customers
Session Settings
2 hours of inactivity
--None--
Password Policies
90 days
3 passwords remembered
8


Setup
Home
Object Manager
Profiles
Custom Object Permissions
Bank
customers
Enhancement Requests
Session Settings
2 hours of inactivity
Password Policies
90 days
3 passwords remembered
8
Must include alpha and numeric characters
Cannot contain password
10
15 minutes


Setup
Home
Object Manager
Profiles
Custom Object Permissions
Bank
customers
Enhancement Requests
Session Settings
2 hours of inactivity
Password Policies
90 days
3 passwords remembered
8
Must include alpha and numeric characters
Cannot contain password
10
15 minutes


Setup
Home
Object Manager
SETUP
Profiles
Setup Home
Service Setup Assistant
Multi-Factor Authentication Assistant
Hyperforce Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
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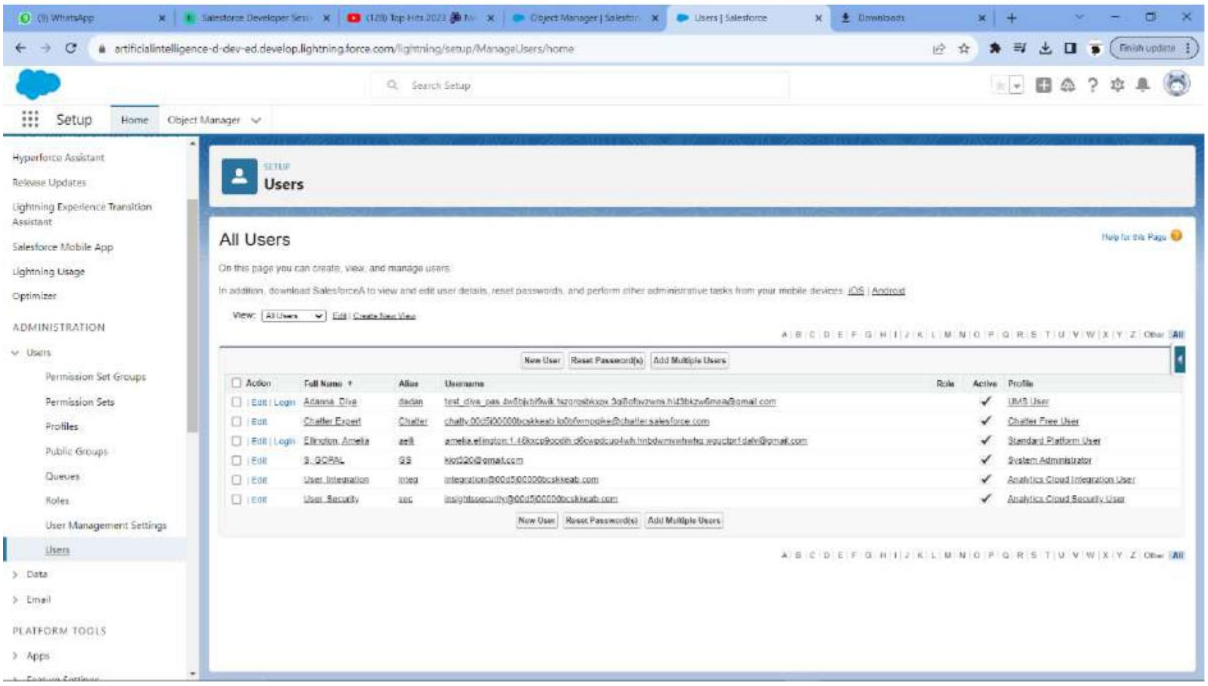
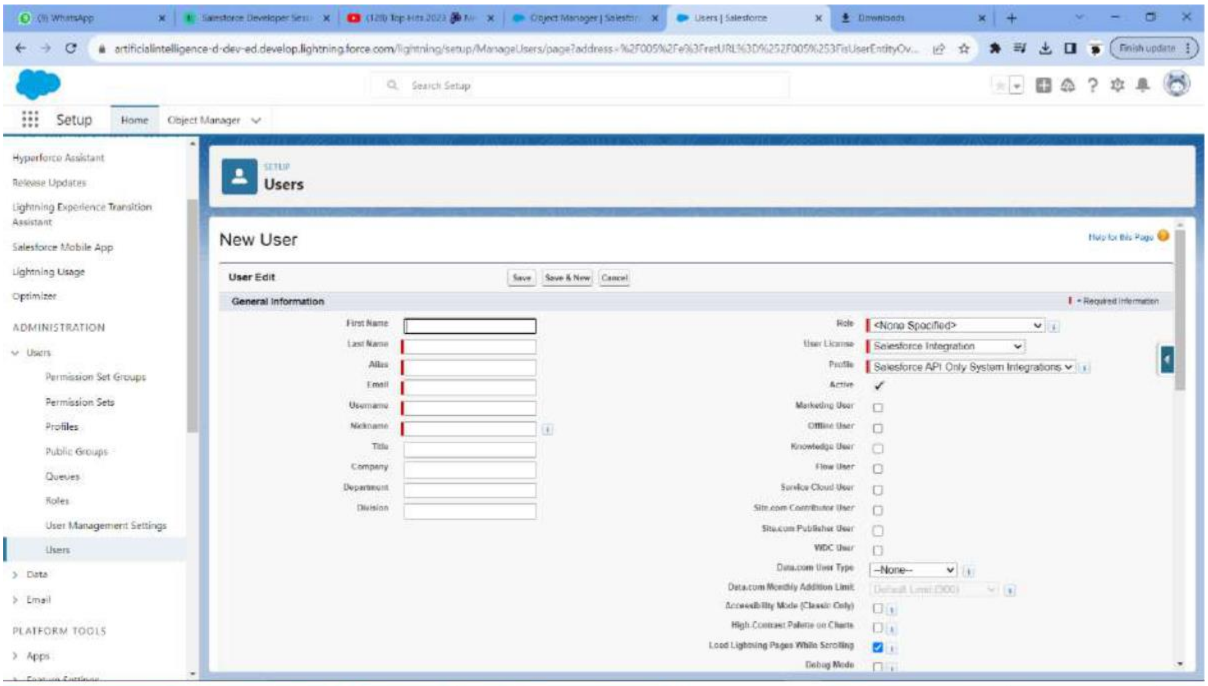
Custom Object Permissions
Basic Access
Data Administration
Read
Create
Edit
Delete
View All
Modify All
Bank
customers
Enhancement Requests
Session Settings
Session Times Out After
2 hours of inactivity
Session Security Level Required at Login
--None--
Password Policies
User passwords expire in
90 days
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

Setup
Home
Object Manager
SETUP
Users
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
Users
Data
Email
PLATFORM TOOLS
Apps
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 | Login
Adanna Dike
Chatter Expert
Chatter
Chatter Free User
Standard Platform User
S GOPAL
System Administrator
User Integration
integ
Analytics Cloud Integration User
User Security
sec
Analytics Cloud Security User


Setup
Home
Object Manager
Hyperforce Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Permission Set Groups
Permission Sets
Profiles
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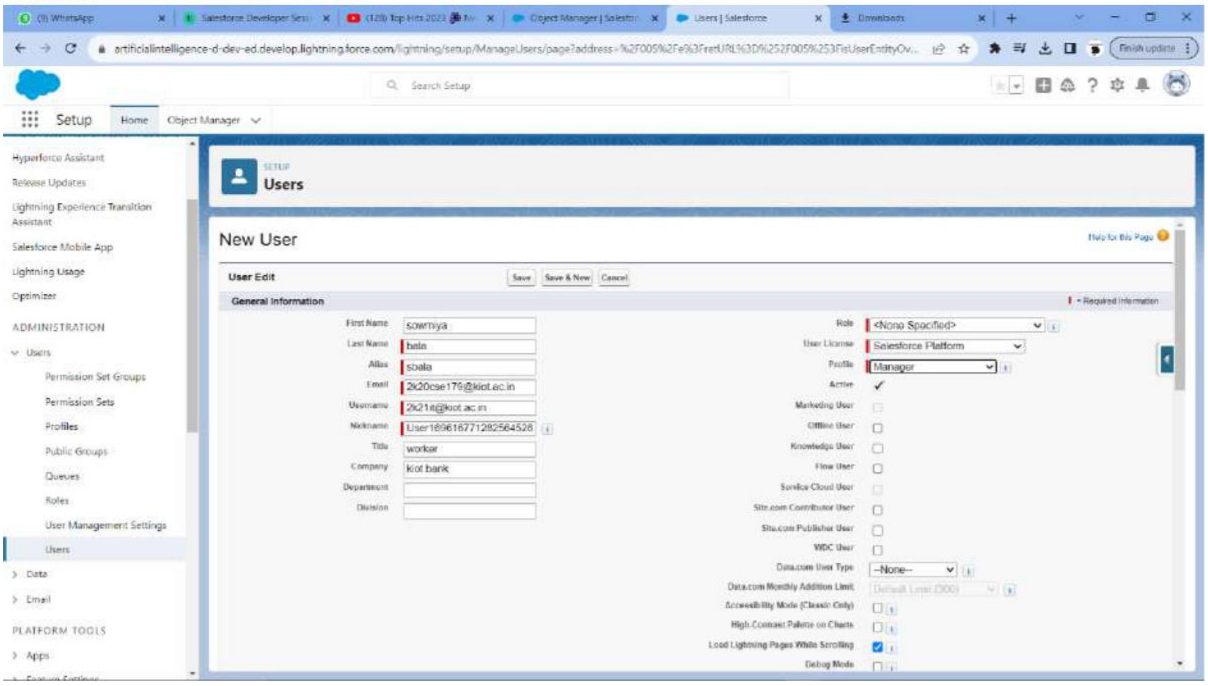
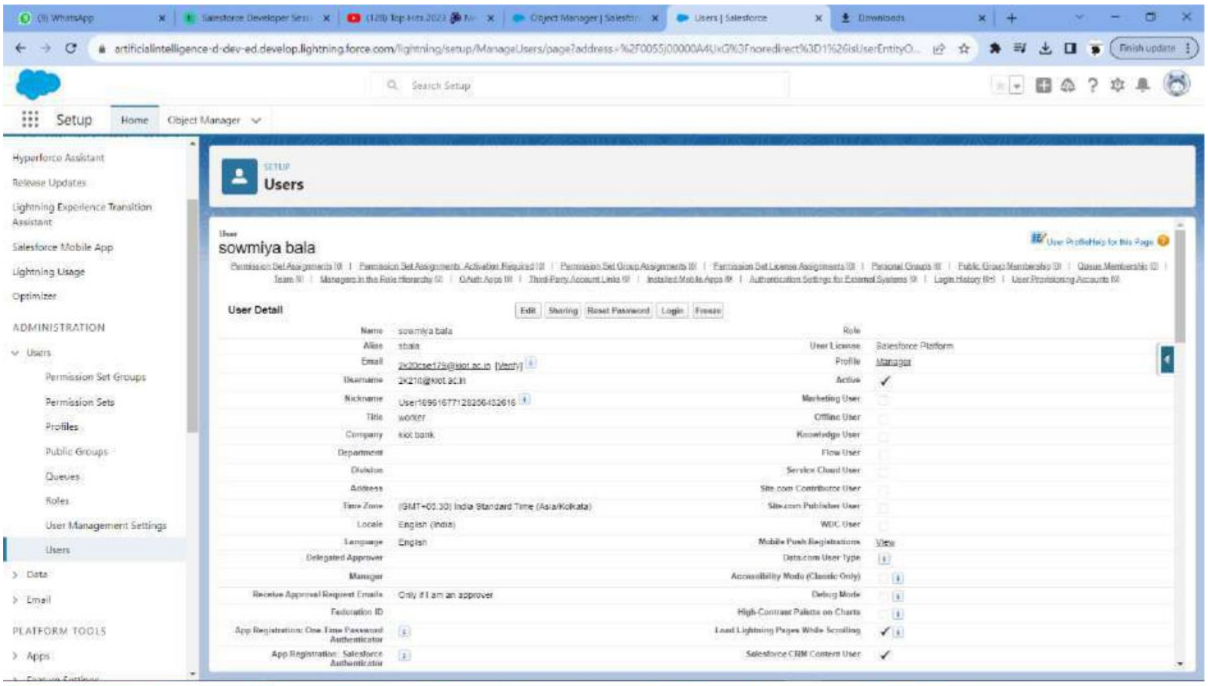
Users
Data
Email
PLATFORM TOOLS
Apps
SETUP
Users
New User
User Edit
Save
Save & New
Cancel
General Information
First Name
Last Name
Alias
Email
Username
Nickname
Title
Company
Department
Division
Role
<None Specified>
User License
Salesforce Integration
Profile
Salesforce API Only System Integrations
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
Accessibility Mode (Classic Only)
High Contrast Palette on Charts
Load Lightning Pages While Scrolling
Debug Mode

Setup
Home
Object Manager
SETUP
Users
New User
User Edit
Save
Save & New
Cancel
General Information
First Name
sowmiya
Last Name
bala
Alias
sbala
Email
2k20cse179@kiot.ac.in
Username
2k21it@kiot.ac.in
Nickname
Title
worker
Company
kiot bank
Department
Division
Role
<None Specified>
User License
Salesforce Platform
Profile
Manager
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
Accessibility Mode (Classic Only)
High Contrast Palette on Charts
Load Lightning Pages While Scrolling
Debug Mode


Setup
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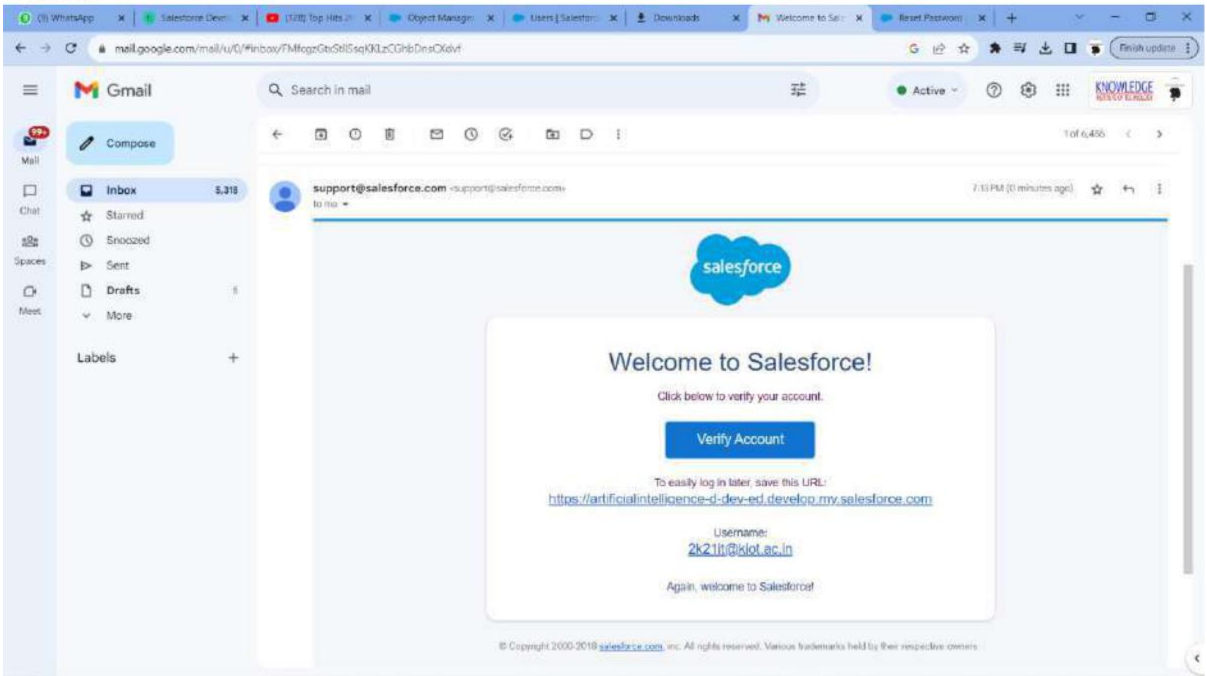
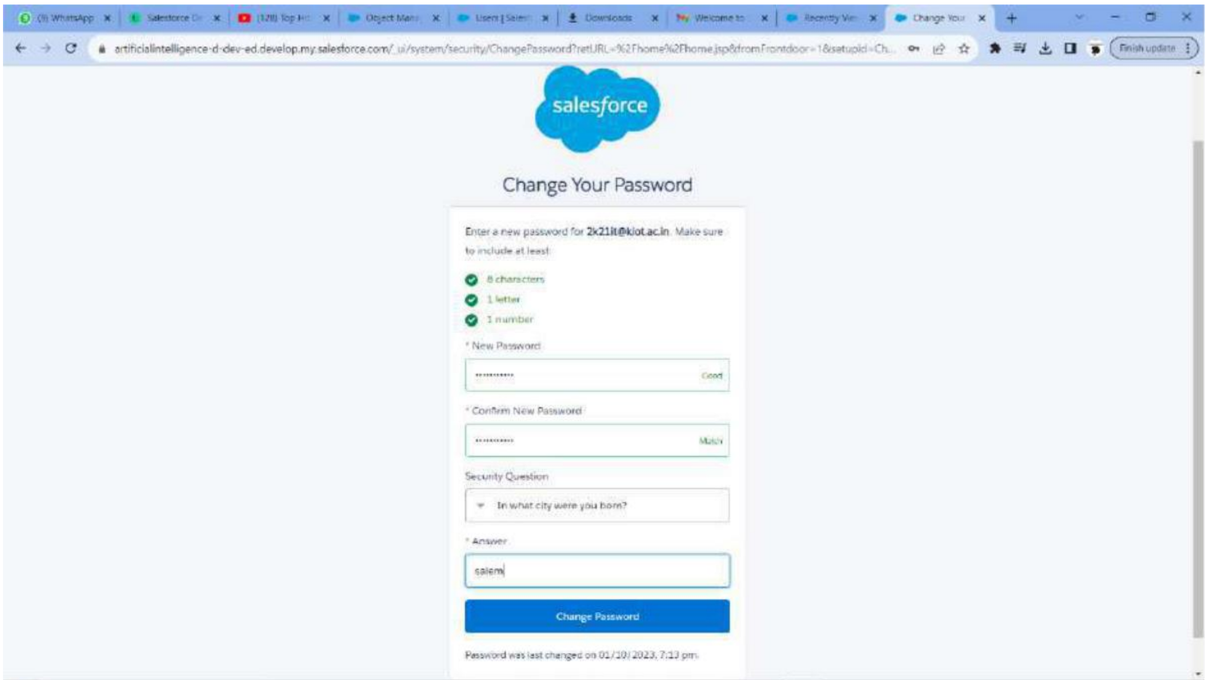
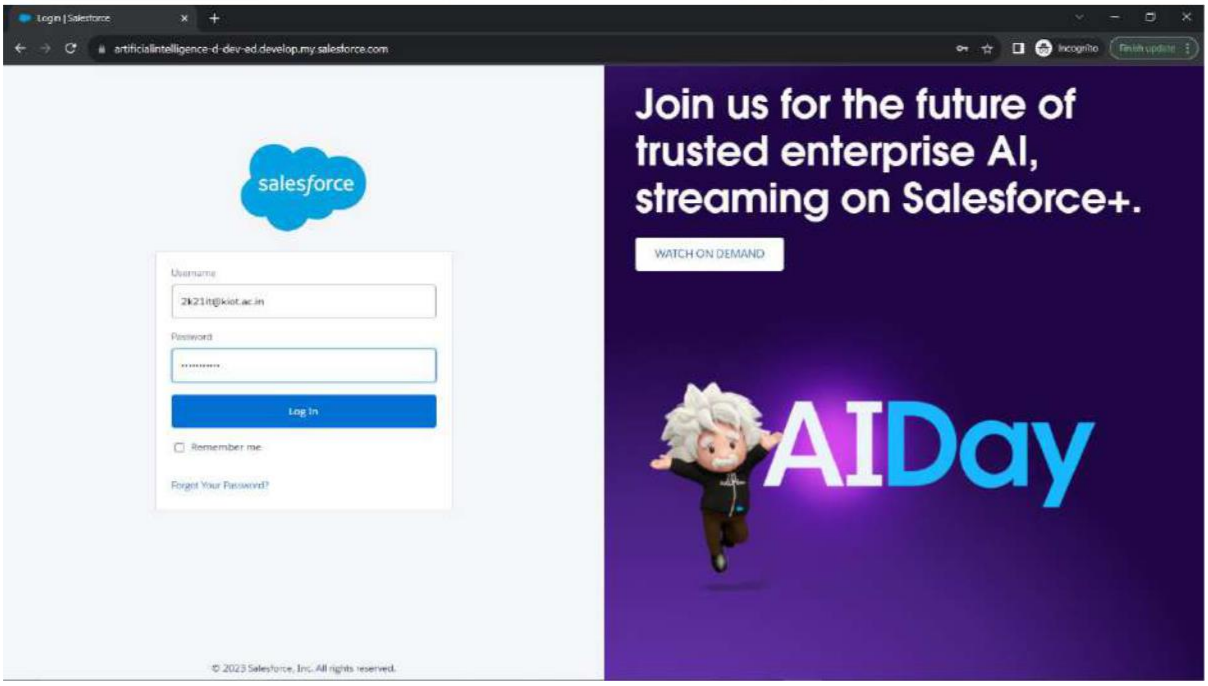
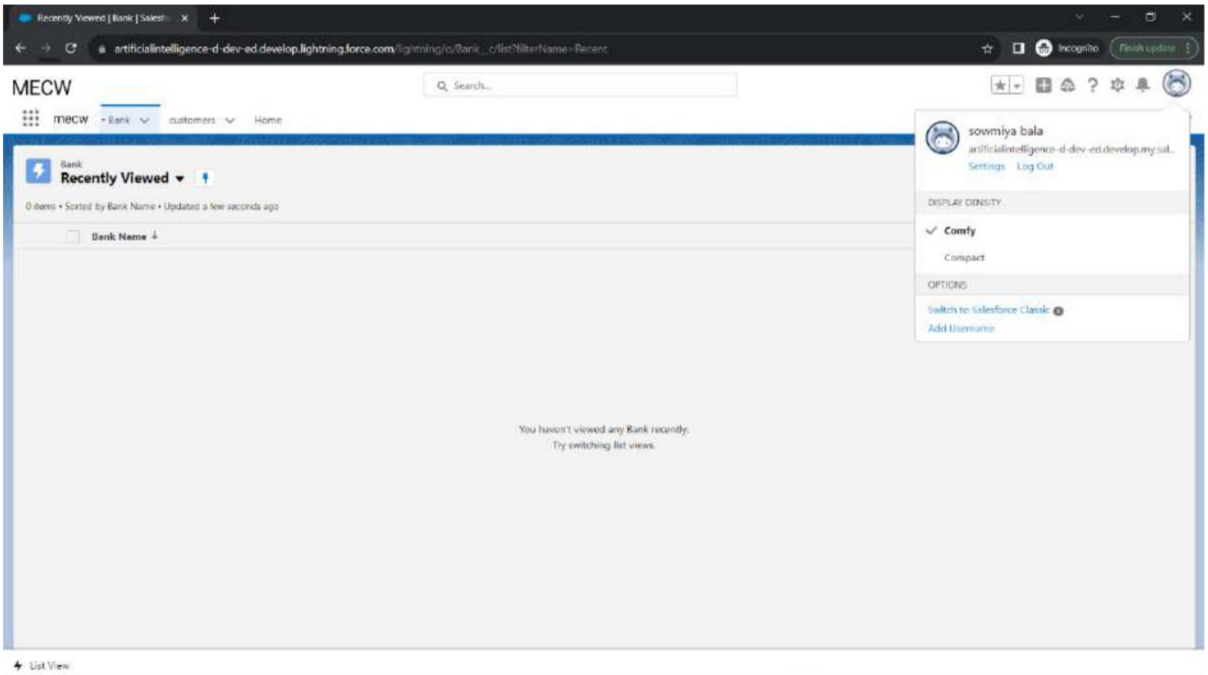
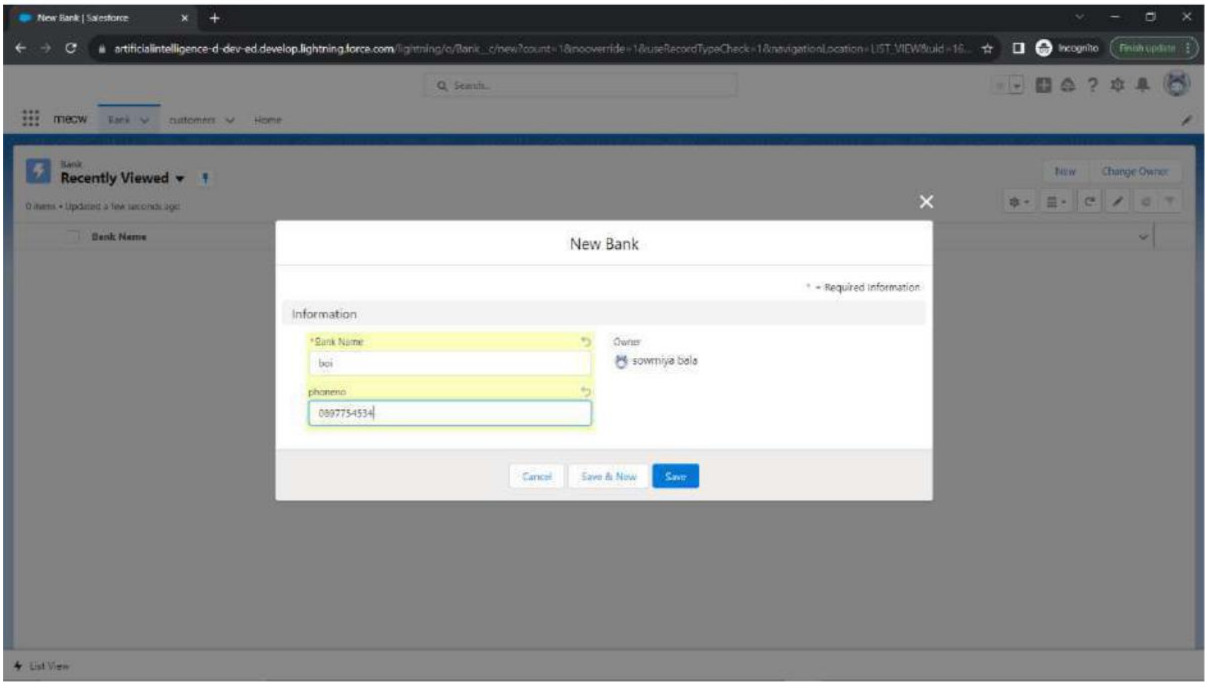
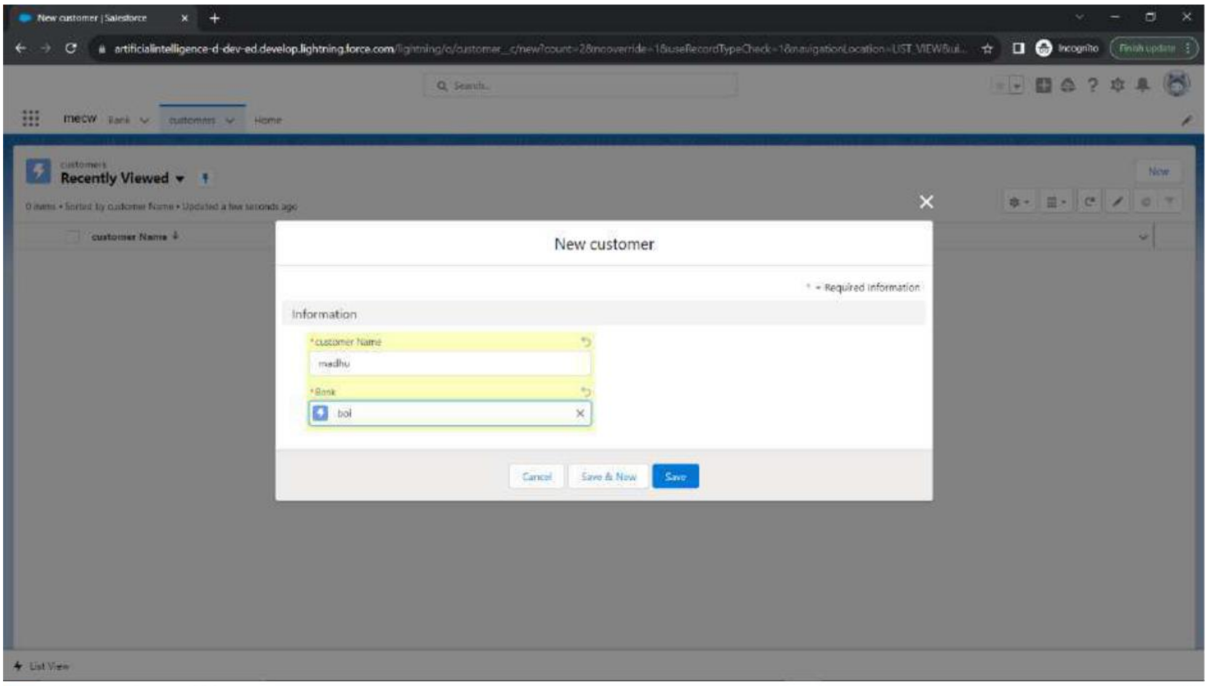
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Data
Email
PLATFORM TOOLS
Apps
SETUP
Users
sowmiya bala
User Detail
Edit
Sharing
Reset Password
Login
Freeze
Name sowmiya bala
Alias sbala
Username 2k21it@kiot.ac.in
Title worker
Company kiot bank
Time Zone (GMT+05:30) India Standard Time (Asia/Kolkata)
Locale English (India)
Language English
Receive Approval Request Emails Only if I am an approver
User License Salesforce Platform
Profile Manager
Active

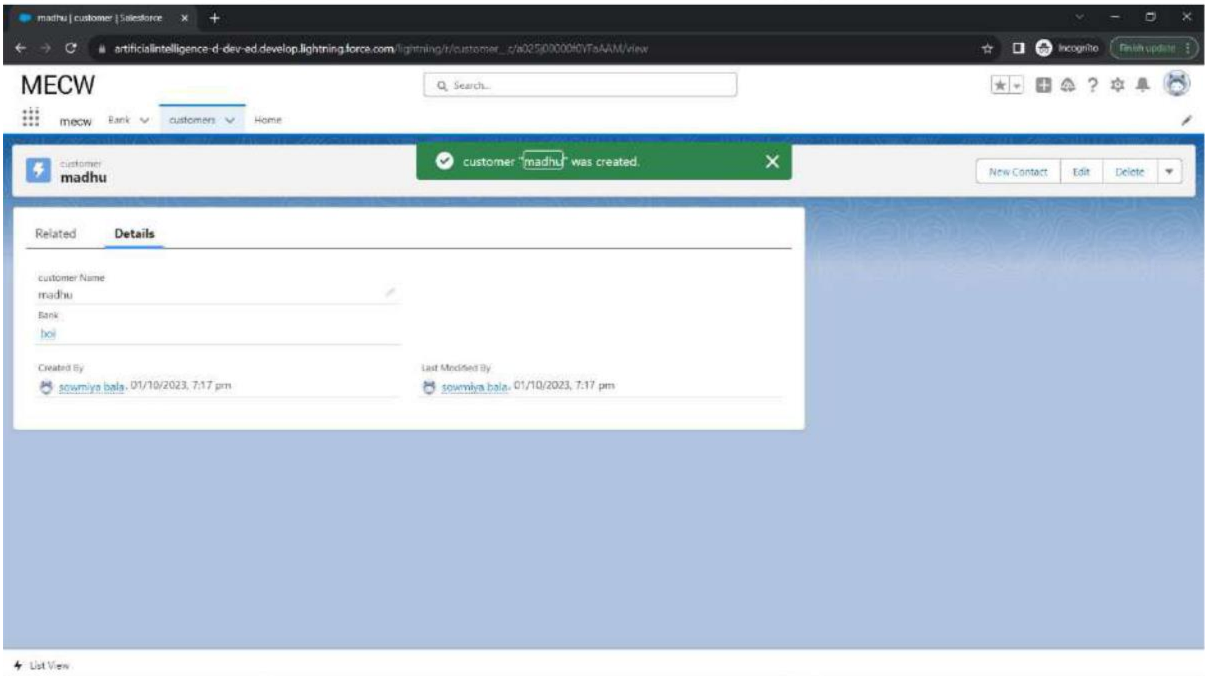

mail.google.com
Gmail
Search in mail
Active
Compose
Inbox 5,318
Starred
Snoozed
Sent
Drafts
More
Labels
support@salesforce.com
salesforce
Welcome to Salesforce!
Click below to verify your account.
Verify Account
To easily log in later, save this URL:
https://artificialintelligence-d-dev-ed.develop.my.salesforce.com
Username:
2k21it@kiot.ac.in
Again, welcome to Salesforce!

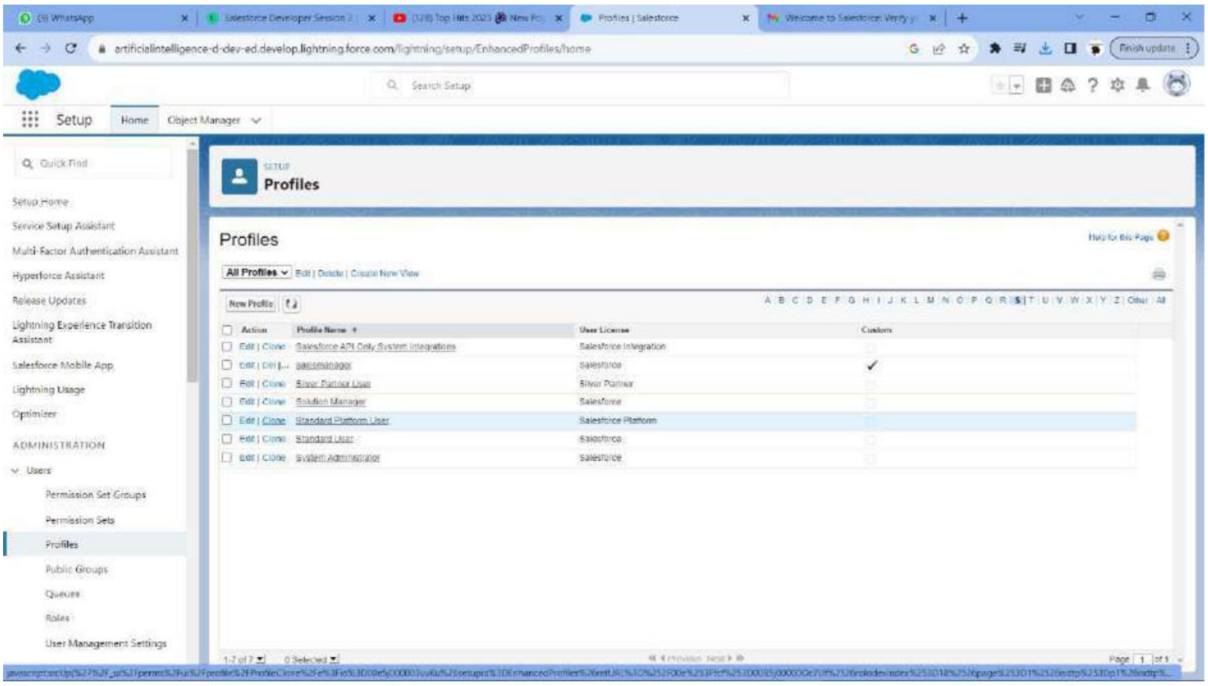

salesforce
Change Your Password
Enter a new password for 2k21it@kiot.ac.in. Make sure to include at least
8 characters
1 letter
1 number
* New Password
* Confirm New Password
Security Question
In what city were you born?
* Answer
salem
Change Password
Password was last changed on 01/10/2023, 7:13 pm.

salesforce
Username
2k21it@kiot.ac.in
Password
Log In
Remember me
Forgot Your Password?
© 2023 Salesforce, Inc. All rights reserved.
Join us for the future of trusted enterprise AI, streaming on Salesforce+.
WATCH ON DEMAND
AIDay


Recently Viewed | Bank | Salesfo
artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/o/Bank__c/list?filterName=Recent
Incognito
Finish update
MECW
Search...
mecw
Bank
customers
Home
Bank
Recently Viewed
0 items • Sorted by Bank Name • Updated a few seconds ago
Bank Name
You haven't viewed any Bank recently.
Try switching list views.
sowmiya bala
Settings
Log Out
DISPLAY DENSITY
Comfy
Compact
OPTIONS
Switch to Salesforce Classic
Add Username
List View

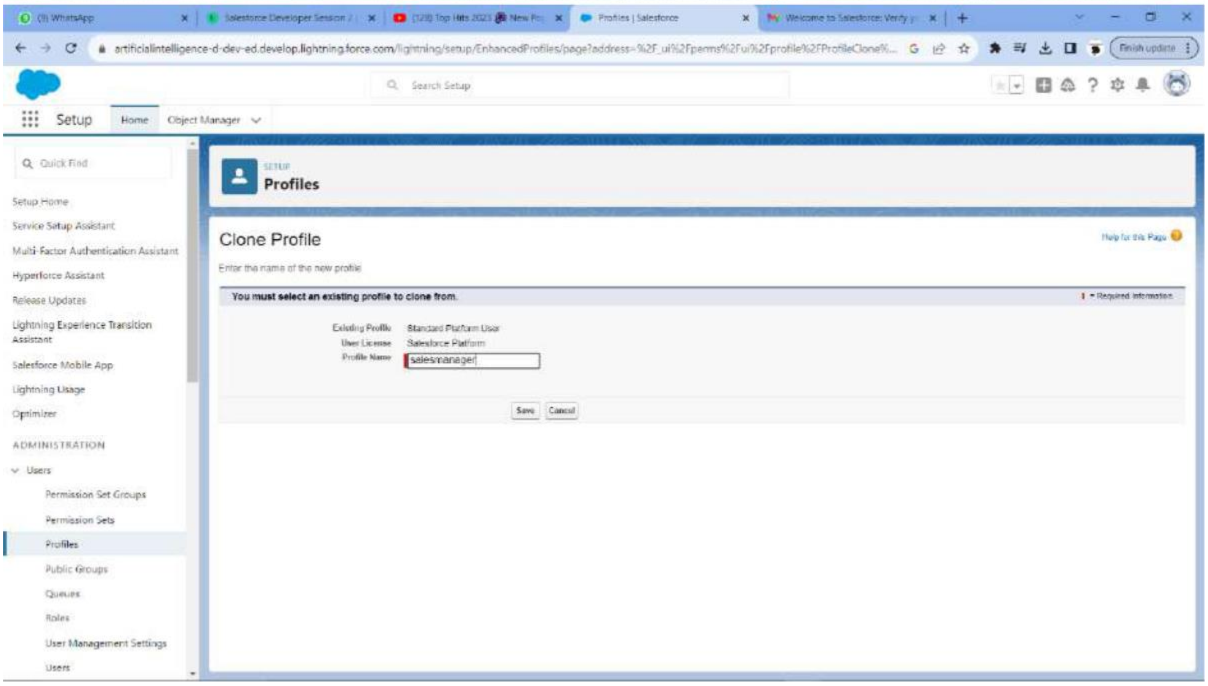

New Bank | Salesforce
Incognito
Finish update
Search...
mecw
Bank
customers
Home
Bank
Recently Viewed
0 items • Updated a few seconds ago
Bank Name
New
Change Owner
New Bank
* = Required Information
Information
*Bank Name
boi
Owner
sowmiya bala
phoneno
0897754534
Cancel
Save & New
Save
List View


New customer | Salesforce
artificialintelligence-d-dev-ed.develop.lightning.force.com
mecw
Bank
customers
Home
customers
Recently Viewed
New customer
Information
customer Name
madhu
Bank
boi
Cancel
Save & New
Save
List View

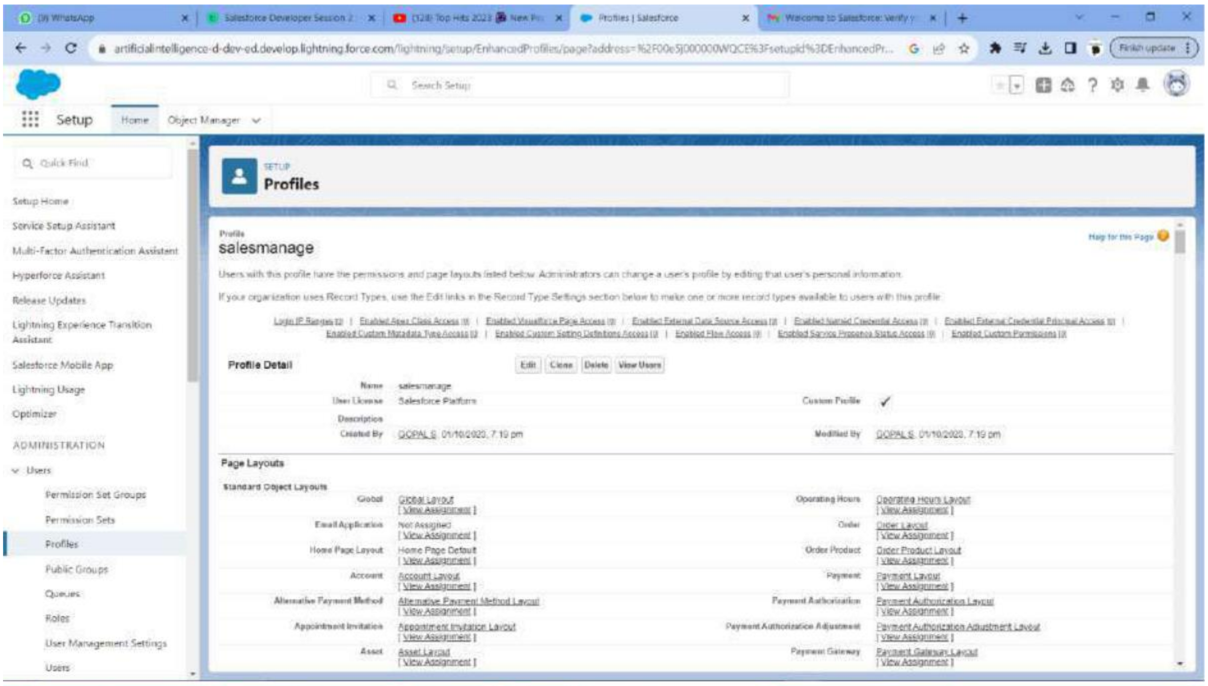

madhu | customer | Salesforce
artificialintelligence-d-dev-ed.develop.lightning.force.com
MECW
mecw
Bank
customers
Home
customer
madhu
customer "madhu" was created.
New Contact
Edit
Delete
Related
Details
customer Name
madhu
Bank
boi
Created By
sowmiya bala, 01/10/2023, 7:17 pm
Last Modified By
sowmiya bala, 01/10/2023, 7:17 pm
List View

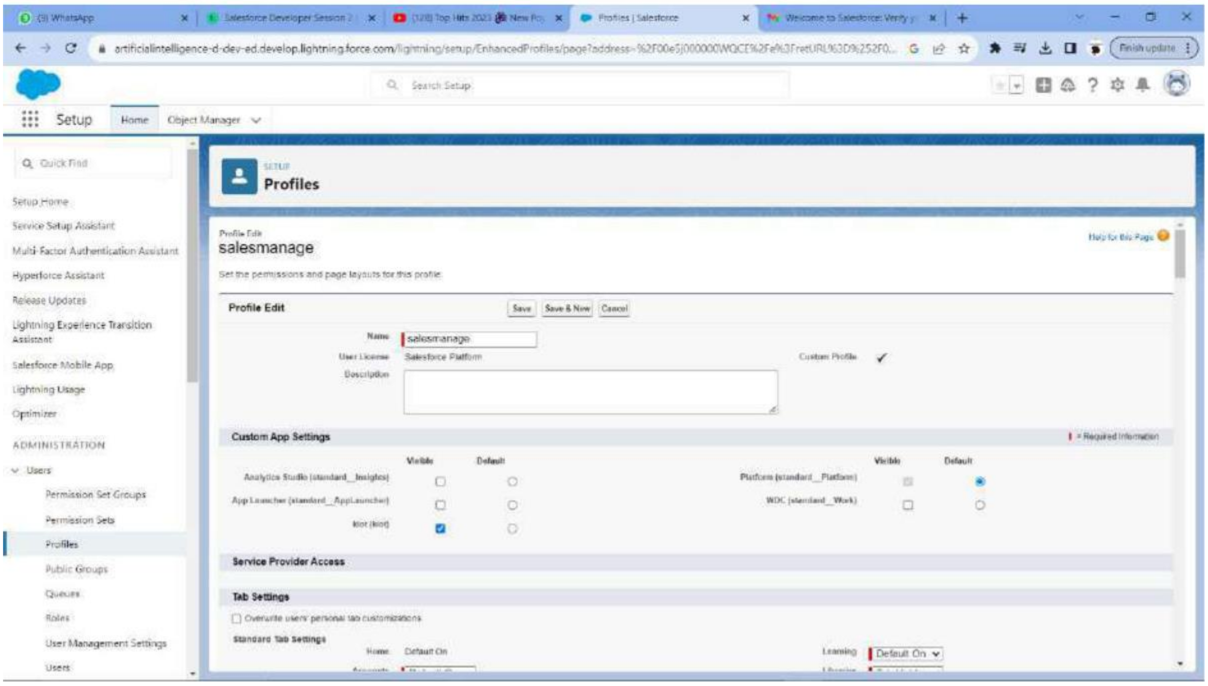


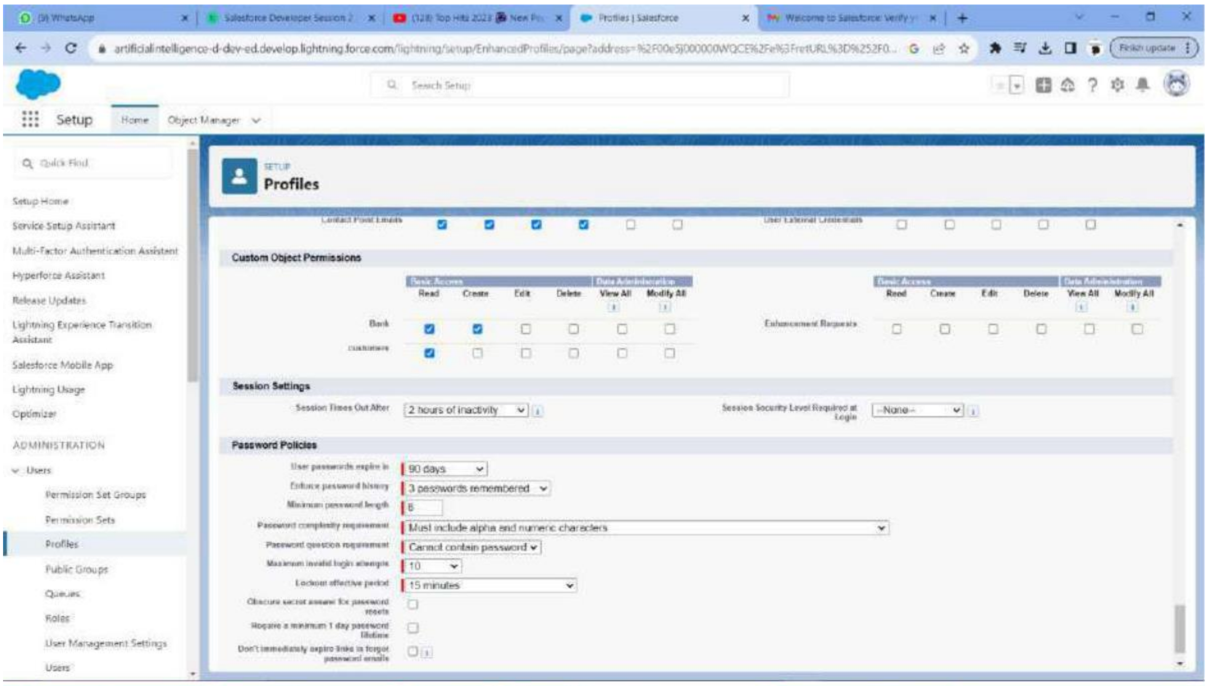
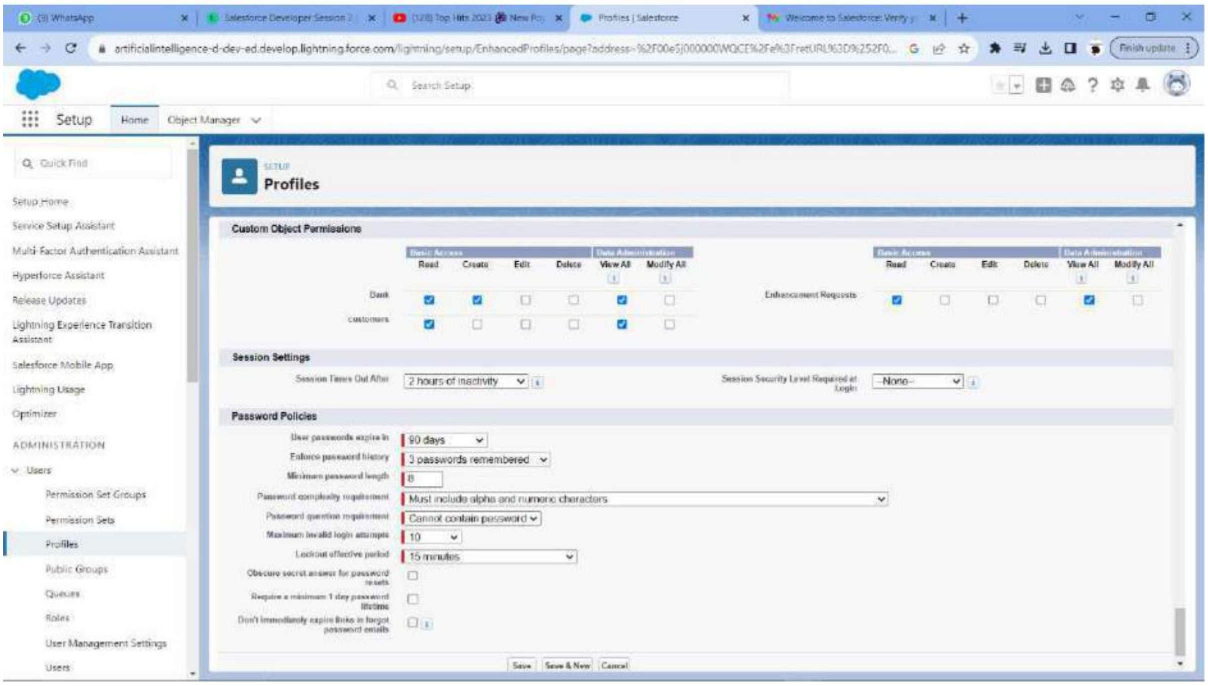
Profiles
Profiles
All Profiles
New Profile
Action
Profile Name
User License
Custom
Edit | Clone
Salesforce API Only System Integrations
Salesforce Integration
salesmanager
Salesforce
Silver Partner User
Silver Partner
Solution Manager
Salesforce
Standard Platform User
Salesforce Platform
Standard User
Salesforce
System Administrator
Salesforce

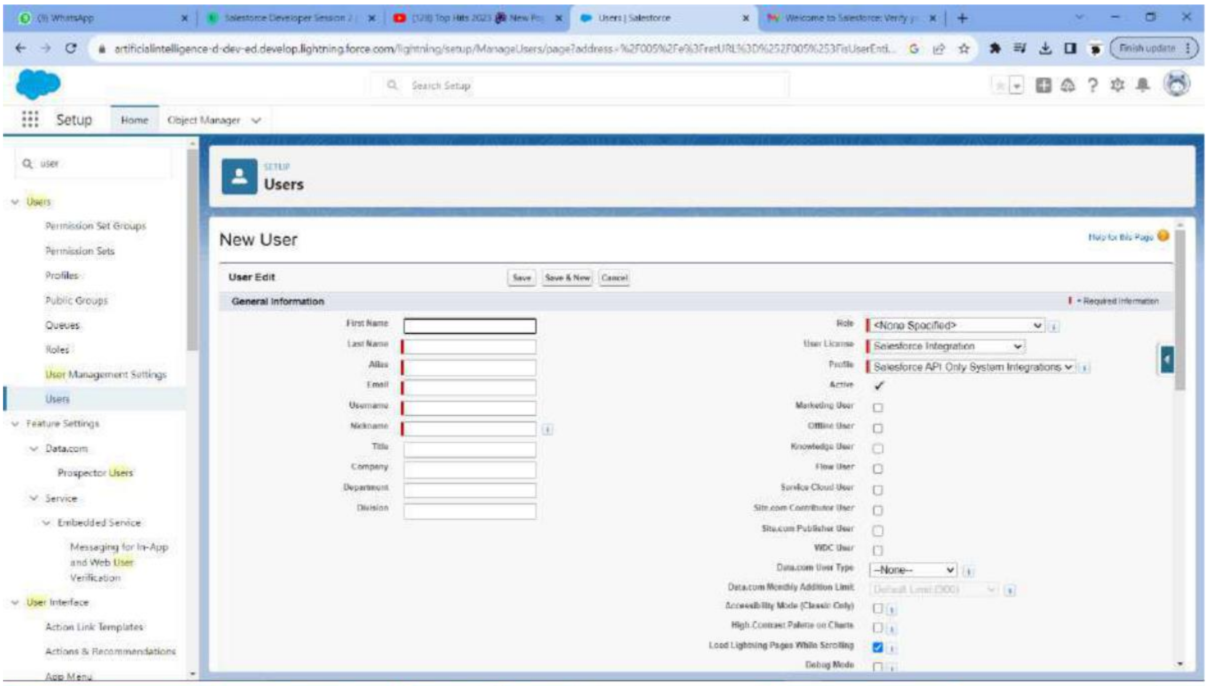


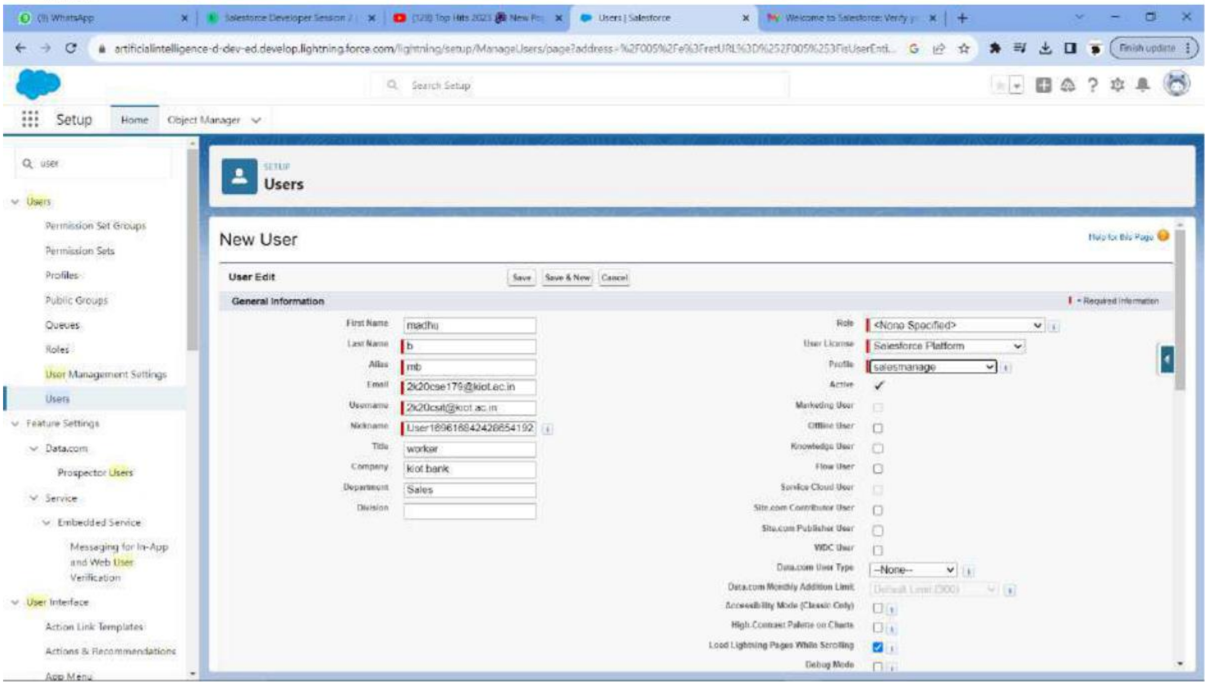
Profiles
Clone Profile
Enter the name of the new profile
You must select an existing profile to clone from.
Existing Profile
Standard Platform User
User License
Salesforce Platform
Profile Name
salesmanager
Save
Cancel

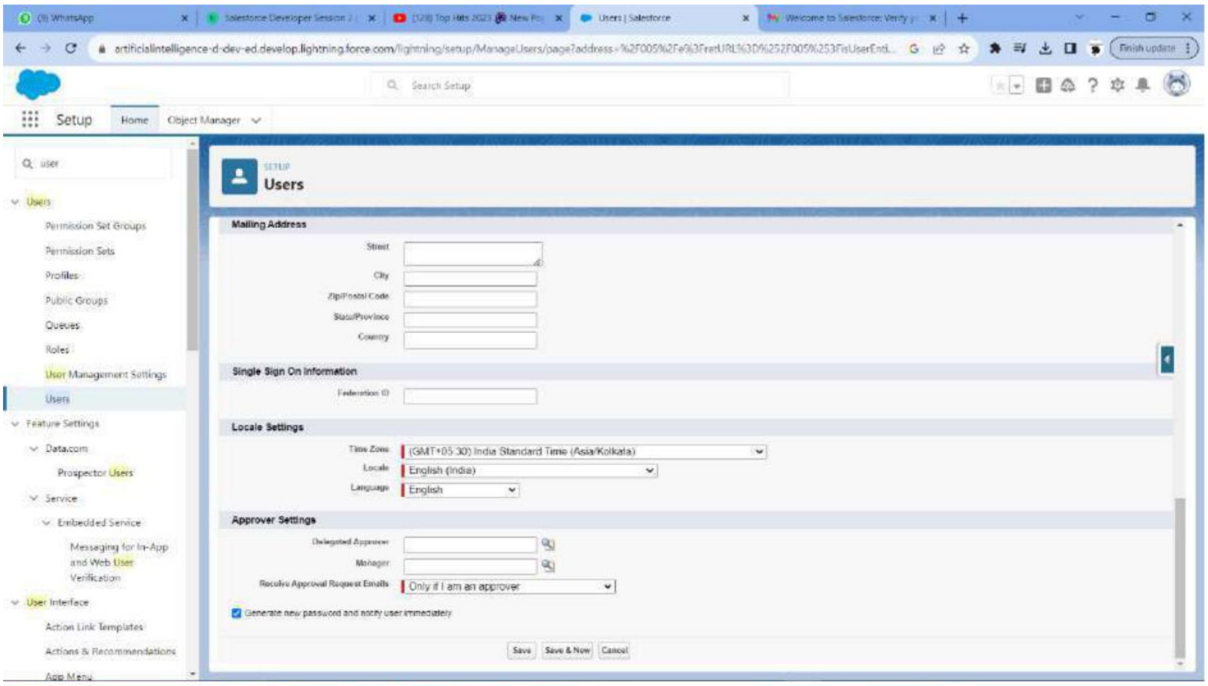

Setup
Home
Object Manager
Profiles
salesmanage
Profile Detail
Edit
Clone
Delete
View Users
Page Layouts
Standard Object Layouts
Setup Home
Service Setup Assistant
Multi-Factor Authentication Assistant
Hyperforce Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users

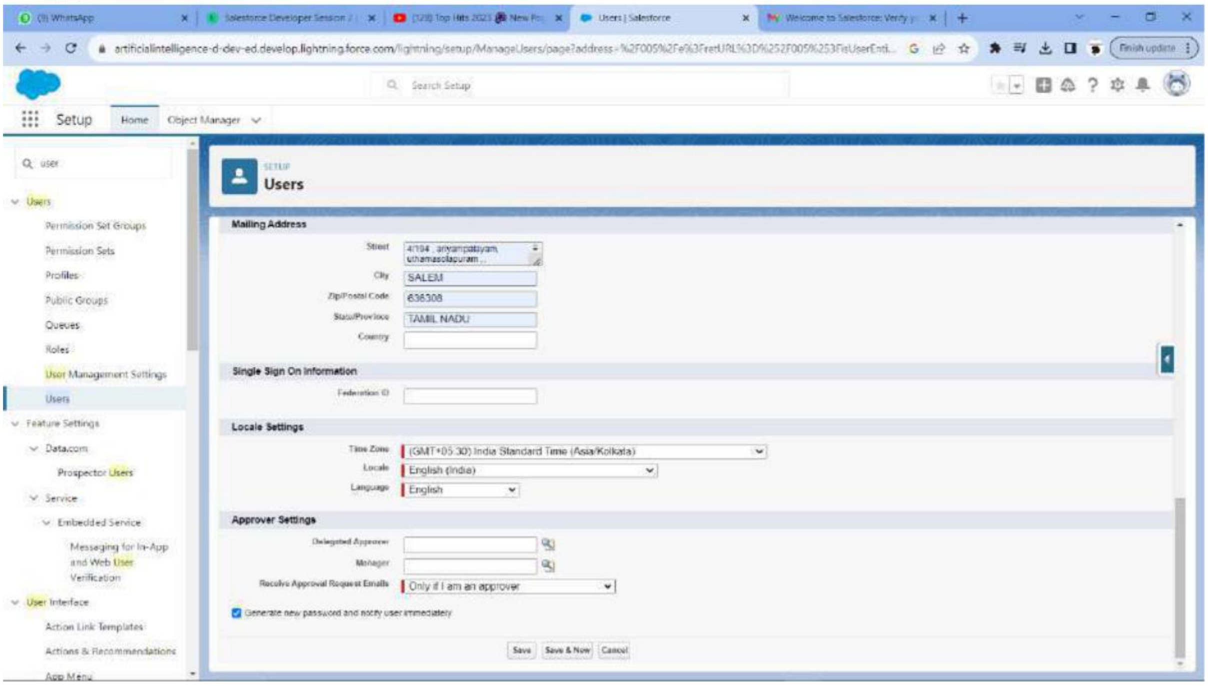

Setup
Home
Object Manager
Profiles
salesmanage
Set the permissions and page layouts for this profile.
Profile Edit
Save
Save & New
Cancel
salesmanage
Salesforce Platform
Custom App Settings
Service Provider Access
Tab Settings
Overwrite users' personal tab customizations
Standard Tab Settings
Default On

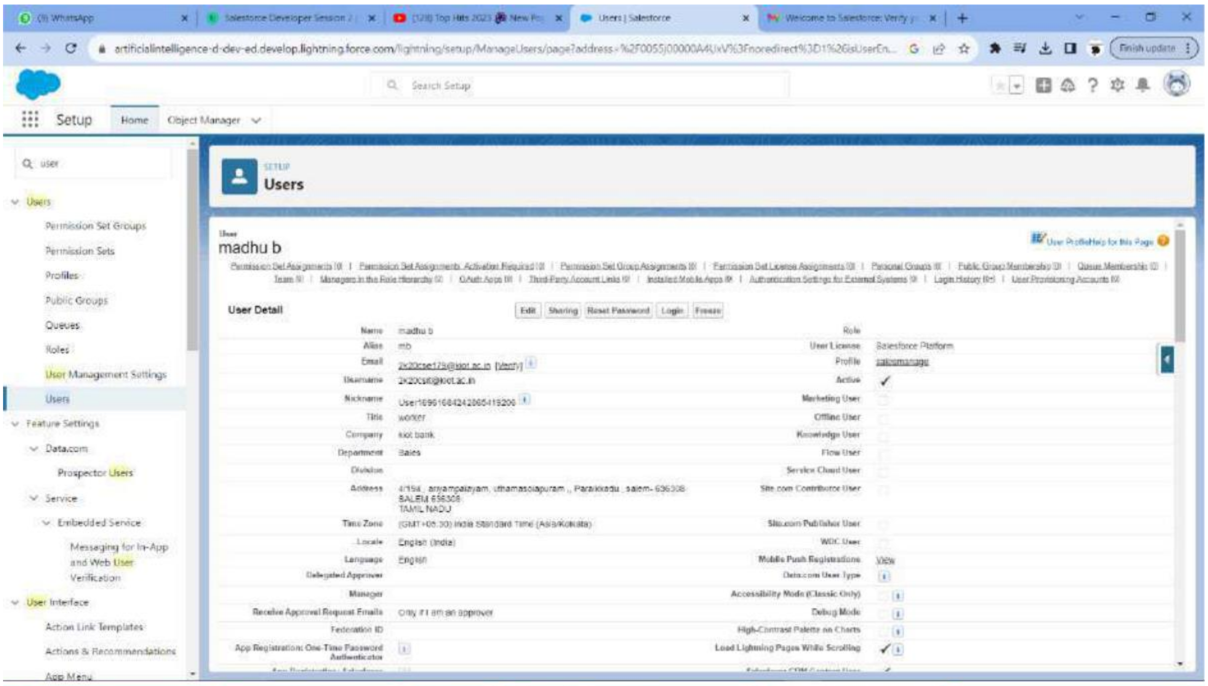

Setup
Profiles
Custom Object Permissions
Basic Access
Data Administration
Read
Create
Edit
Delete
View All
Modify All
Bank
customers
Enhancement Requests
Session Settings
Session Times Out After
2 hours of inactivity
Session Security Level Required at Login
--None--
Password Policies
User passwords expire 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

Setup
Profiles
Custom Object Permissions
Basic Access
Data Administration
Read
Create
Edit
Delete
View All
Modify All
Bank
customers
Enhancement Requests
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

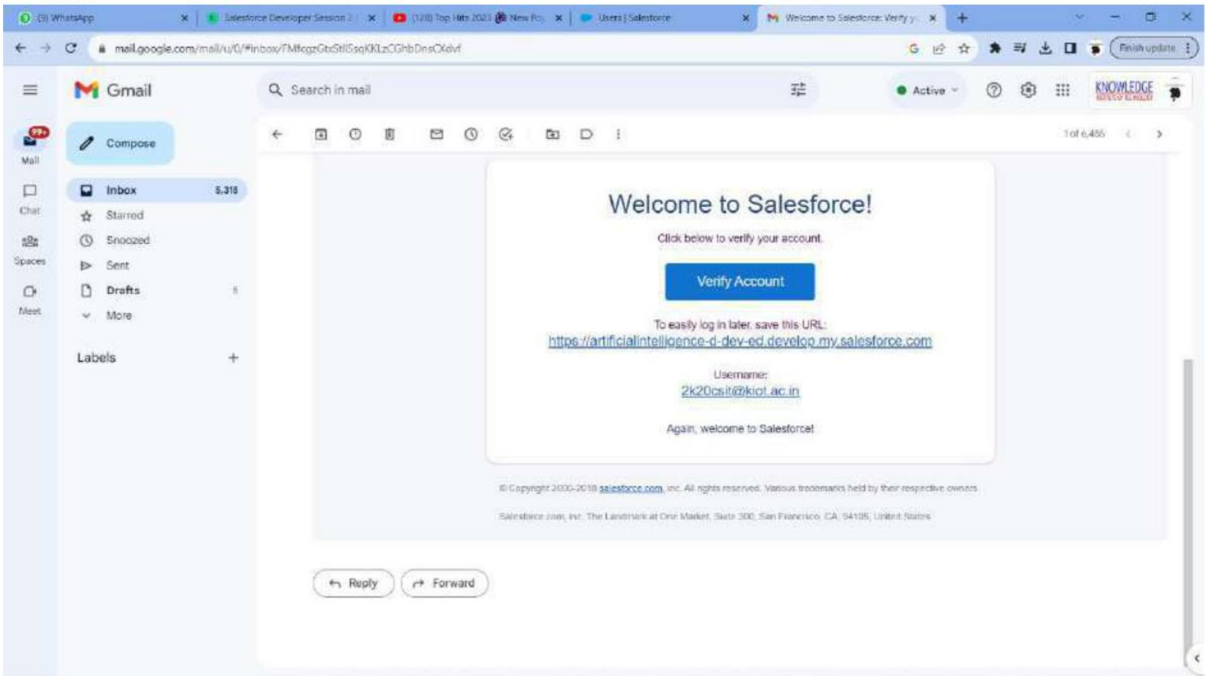


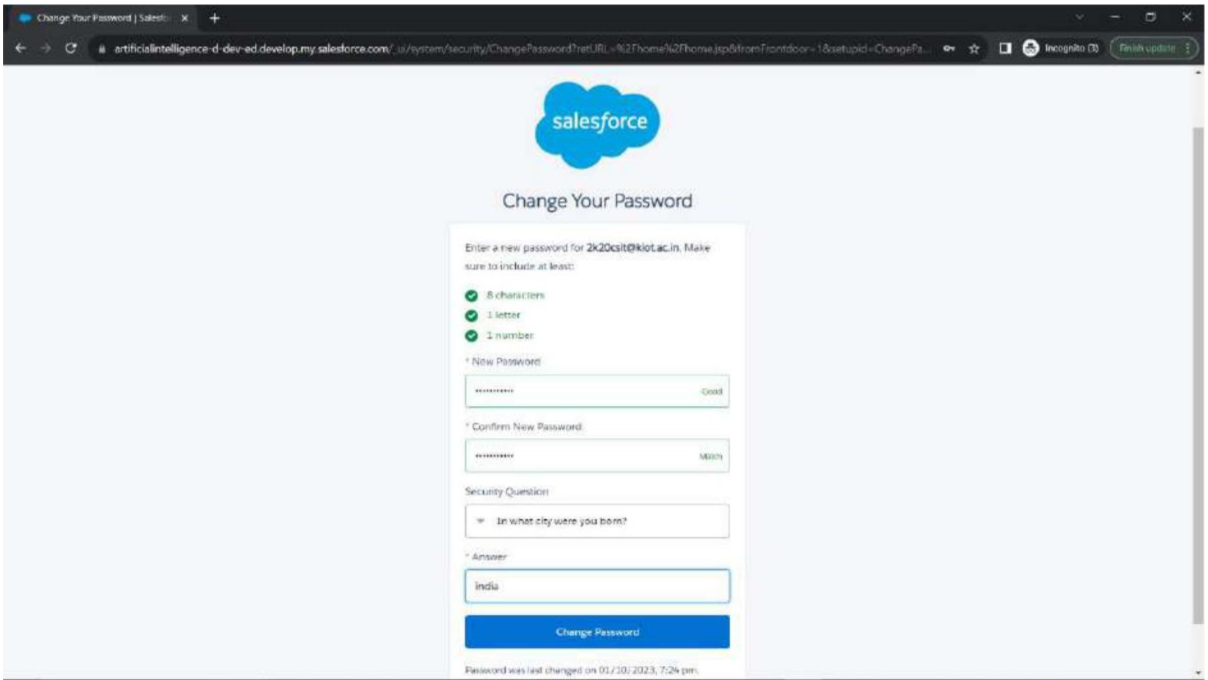


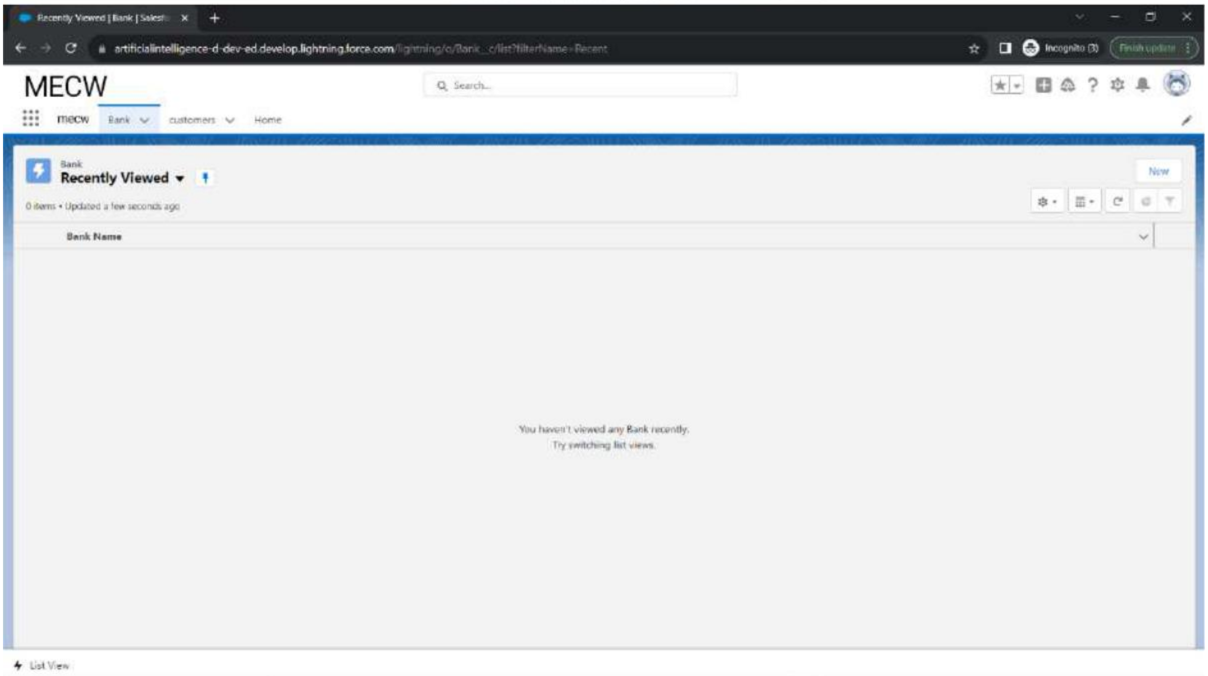

Setup
Home
Object Manager
Users
Mailing Address
Street
City
Zip/Postal Code
State/Province
Country
Single Sign On Information
Federation ID
Locale Settings
Time Zone
(GMT+05:30) India Standard Time (Asia/Kolkata)
Locale
English (India)
Language
English
Approver Settings
Delegated Approver
Manager
Receive Approval Request Emails
Only if I am an approver
Generate new password and notify user immediately
Save
Save & New
Cancel

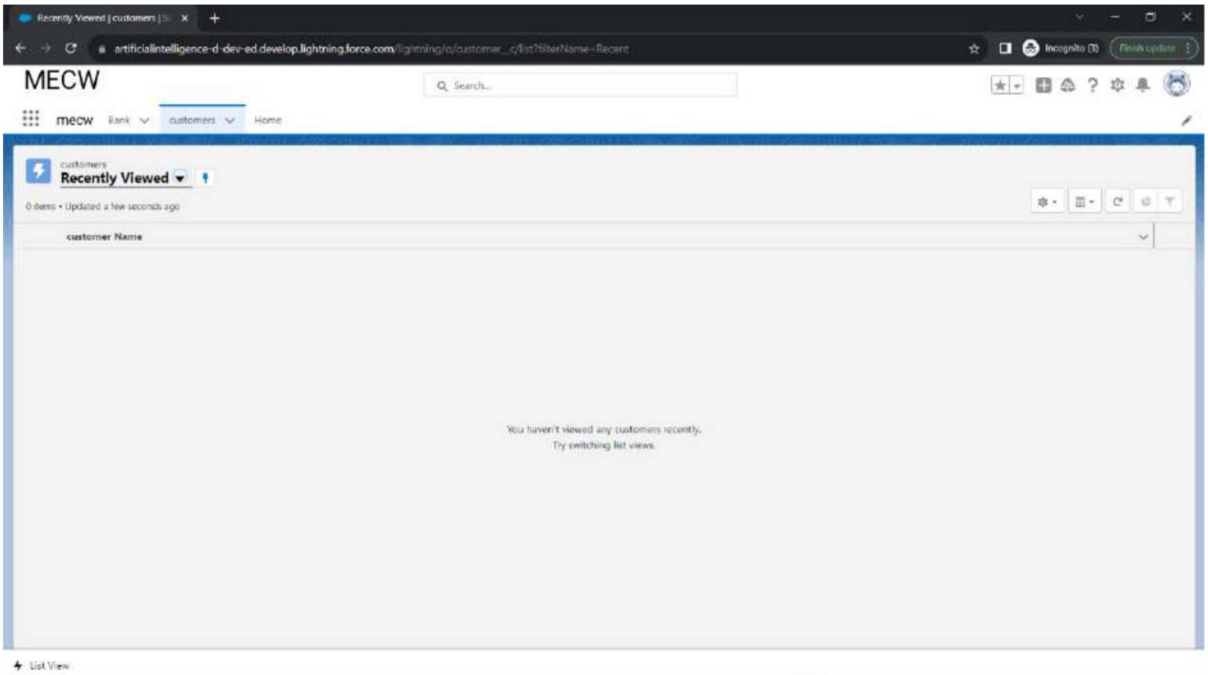

Setup
Home
Object Manager
Users
Mailing Address
Street
City
SALEM
Zip/Postal Code
636308
State/Province
TAMIL NADU
Country
Single Sign On Information
Federation ID
Locale Settings
Time Zone
(GMT+05:30) India Standard Time (Asia/Kolkata)
Locale
English (India)
Language
English
Approver Settings
Delegated Approver
Manager
Receive Approval Request Emails
Only if I am an approver
Generate new password and notify user immediately
Save
Save & New
Cancel

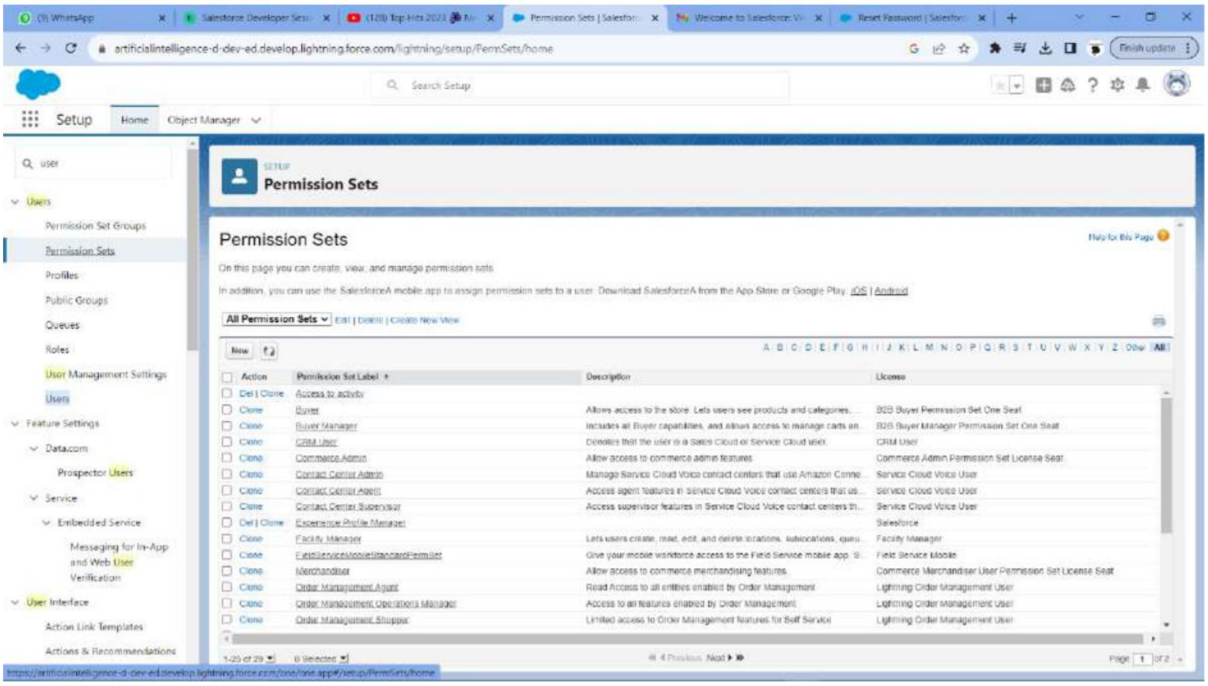

Setup
Home
Object Manager
Users
madhu b
User Detail
Edit
Sharing
Reset Password
Login
Freeze
Name madhu b
Alias mb
Username 2k20csit@kiot.ac.in
Title worker
Company kiot bank
Department Sales
Time Zone (GMT+05:30) India Standard Time (Asia/Kolkata)
Locale English (India)
Language English
User License Salesforce Platform
Active
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users


Gmail
Search in mail
Compose
Inbox 5,318
Starred
Snoozed
Sent
Drafts
More
Labels
Welcome to Salesforce!
Click below to verify your account.
Verify Account
To easily log in later, save this URL:
https://artificialintelligence-d-dev-ed.develop.my.salesforce.com
Username:
2k20csit@kiot.ac.in
Again, welcome to Salesforce!
Reply
Forward


Change Your Password | Salesf
artificialintelligence-d-dev-ed.develop.my.salesforce.com/
salesforce
Change Your Password
Enter a new password for 2k20csit@kiot.ac.in. Make sure to include at least:
8 characters
1 letter
1 number
* New Password
Good
* Confirm New Password
Match
Security Question
In what city were you born?
* Answer
india
Change Password
Password was last changed on 01/10/2023, 7:24 pm.


Recently Viewed | Bank | Salesf
artificialintelligence-d-dev-ed.develop.lightning.force.com/
MECW
Search...
mecw
Bank
customers
Home
Bank
Recently Viewed
New
0 items • Updated a few seconds ago
Bank Name
You haven't viewed any Bank recently.
Try switching list views.
List View


MECW
mecw
customers
Home
customers
Recently Viewed
0 items • Updated a few seconds ago
customer Name
You haven't viewed any customers recently.
Try switching list views.
List View


Setup
Home
Object Manager
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Feature Settings
Service
User Interface
Permission Sets
On this page you can create, view, and manage permission sets.
All Permission Sets
Action
Permission Set Label
Description
License

Step 2:

Permission Sets:

• Create two permission sets, one for User A and one for User B.

Object-Level Security:

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

"Read" to ensure that both I-Jser A and I-Jser B can view Account records.

Record-Level Security:

• Implement record-level security using Criteria-Based Sharing Rules.

• Create a sharing rule that shares Account records owned by User A with User A and

records owned by IJser B with user B.

• For the sharing rule criteria, specify that records owned by User A are shared with user

A, and records owned by User B are shared with User B.

Ownership:

• Ensure that the Account records are owned by the respective users, with User A owning

their records and User B owning their records.

Organization-Wide Defaults:

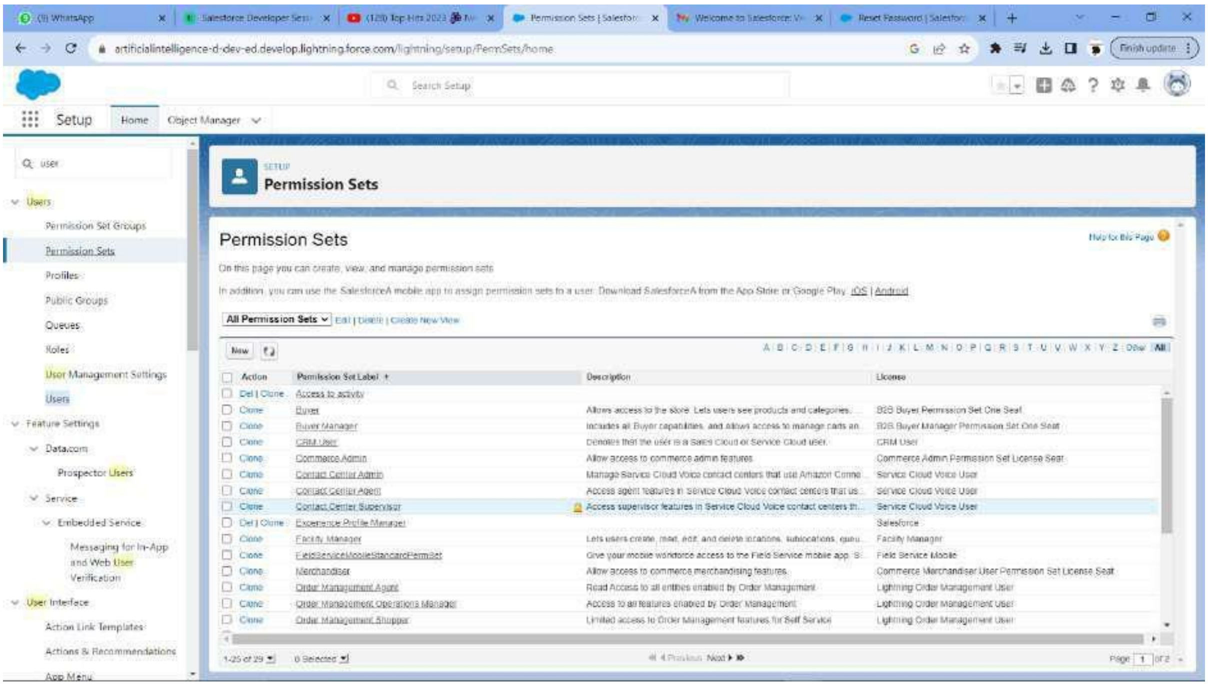
• Set the organization-wide defaults for the Account object to "Private" to ensure that

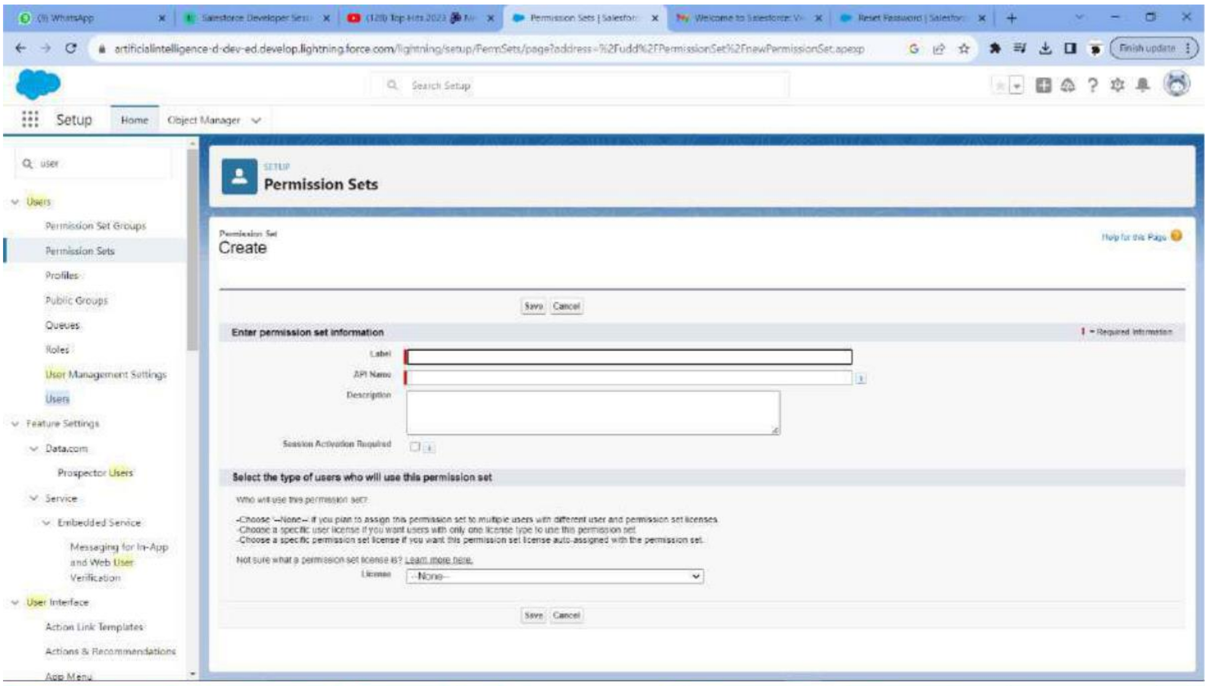
records are private by default.

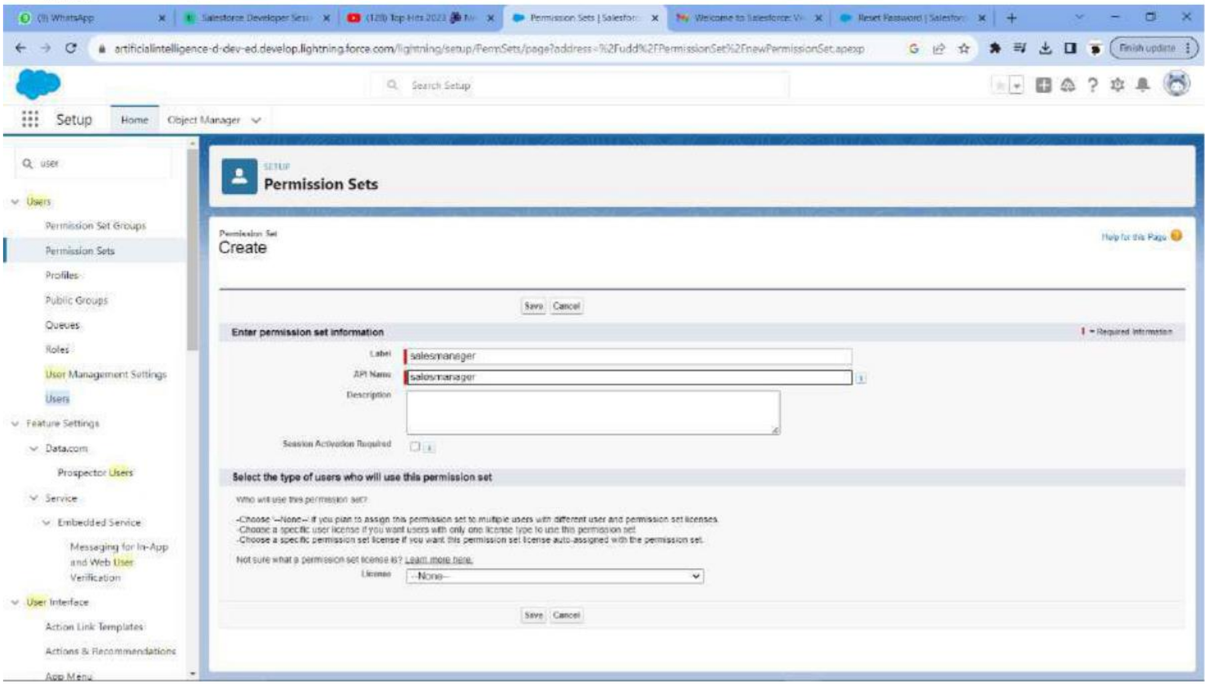
Testing:

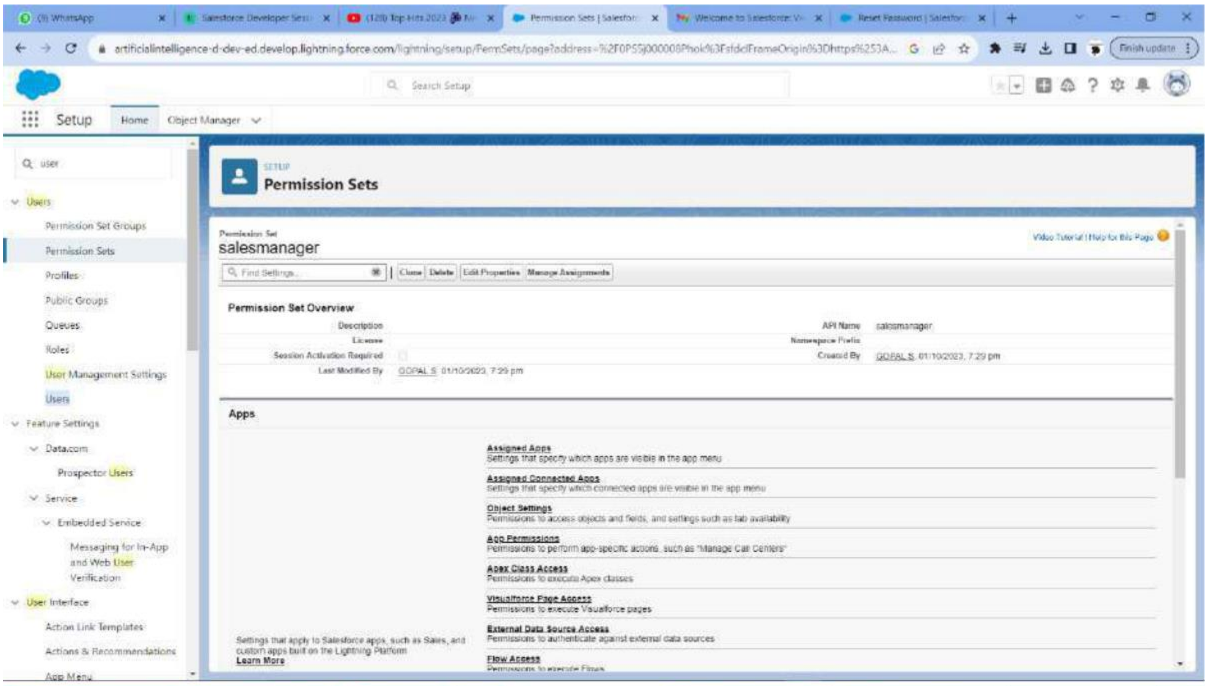
• Test the setup by logging in as User A and User B separately to verify that they cannot

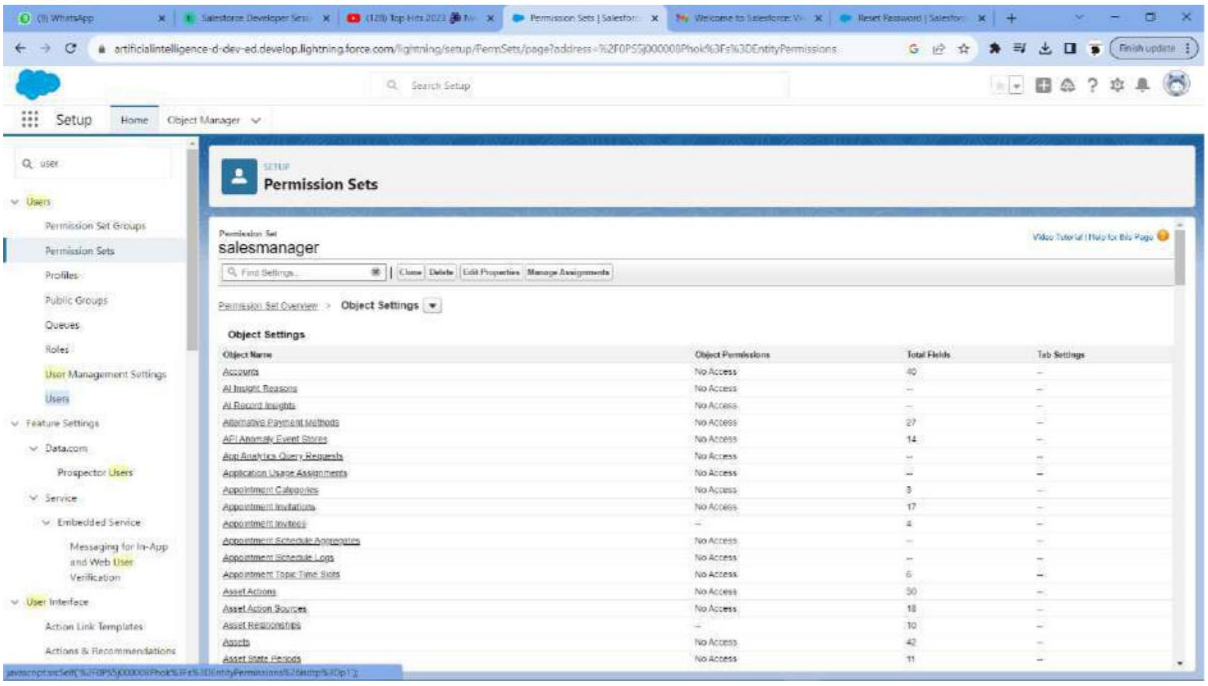
access each other's records.

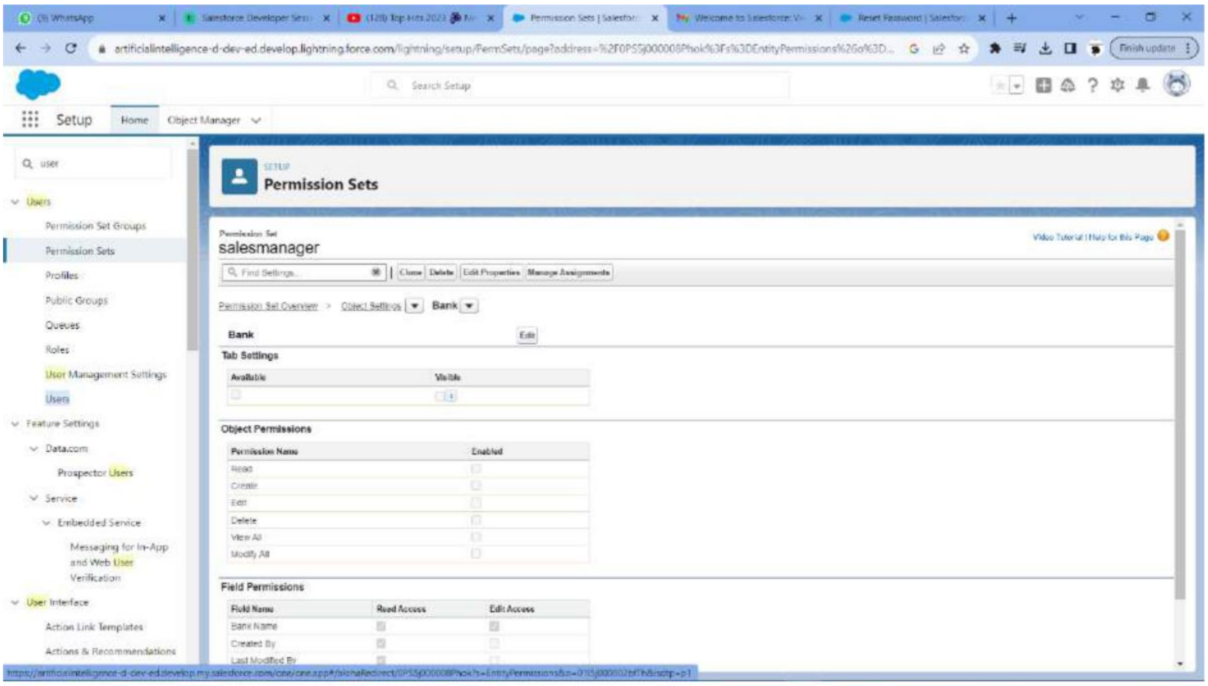


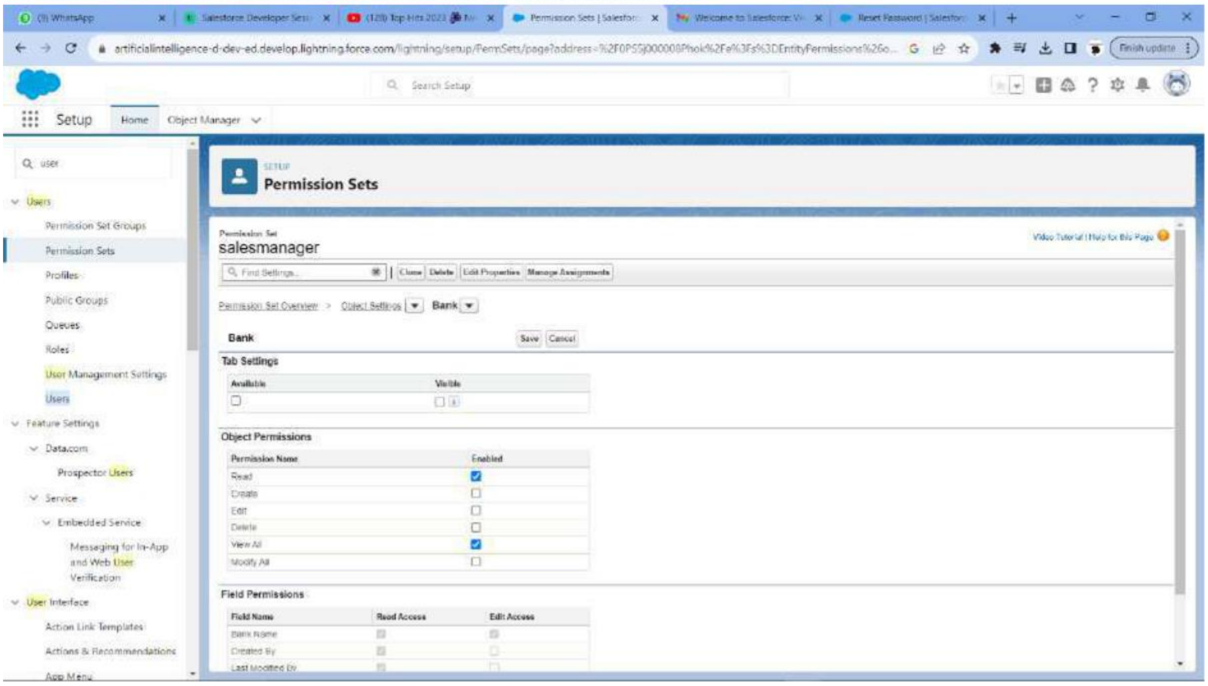


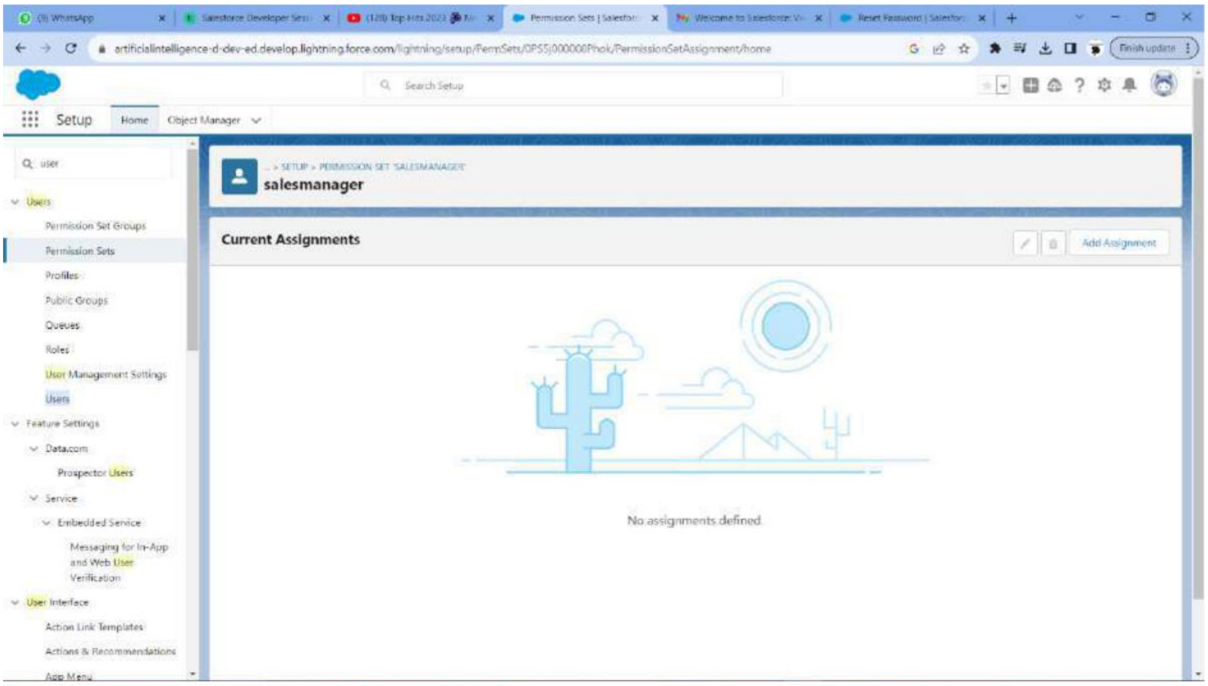


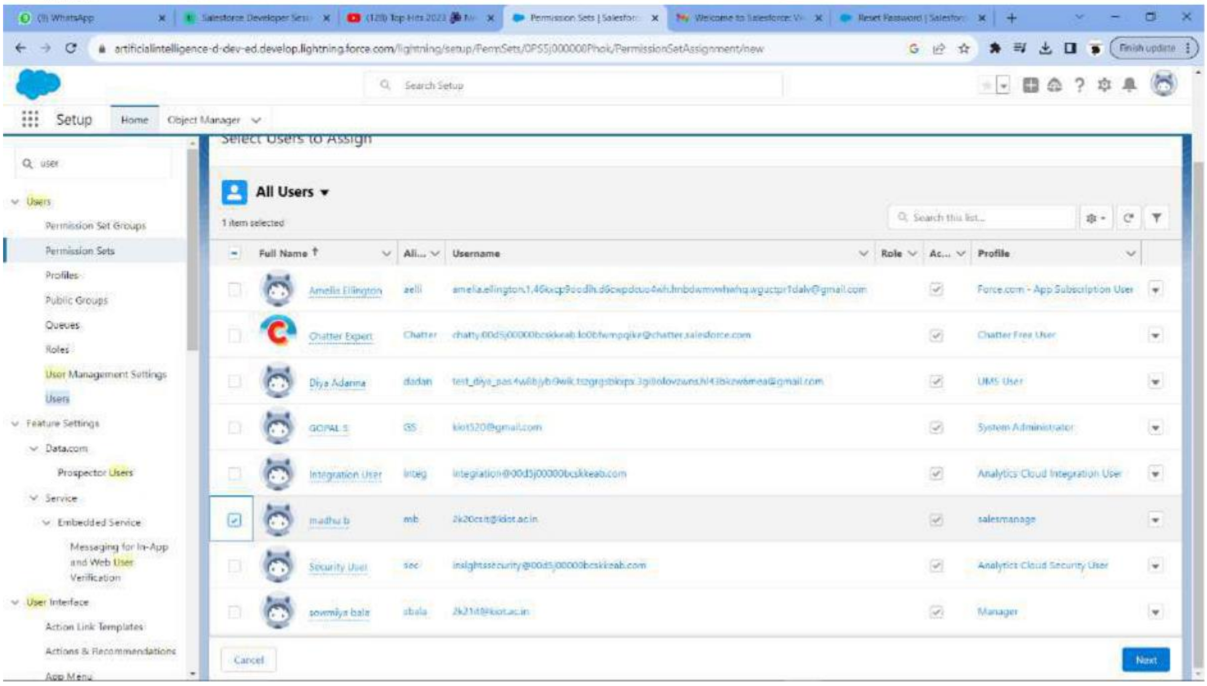

Setup
Home
Object Manager
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Feature Settings
Data.com
Prospector Users
Service
Embedded Service
Messaging for In-App and Web User Verification
User Interface
Action Link Templates
Actions & Recommendations
SETUP
Permission Sets
Permission Set
salesmanager
Clone
Delete
Edit Properties
Manage Assignments
Video Tutorial | Help for this Page
Permission Set Overview
Description
License
Session Activation Required
Last Modified By GOPAL S, 01/10/2023, 7:29 pm
API Name salesmanager
Namespace Prefix
Created By GOPAL S, 01/10/2023, 7:29 pm
Apps
Assigned Apps
Settings that specify which apps are visible in the app menu
Assigned Connected Apps
Settings that specify which connected apps are visible in the app menu
Object Settings
Permissions to access objects and fields, and settings such as tab availability
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
Flow Access
Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform
Learn More

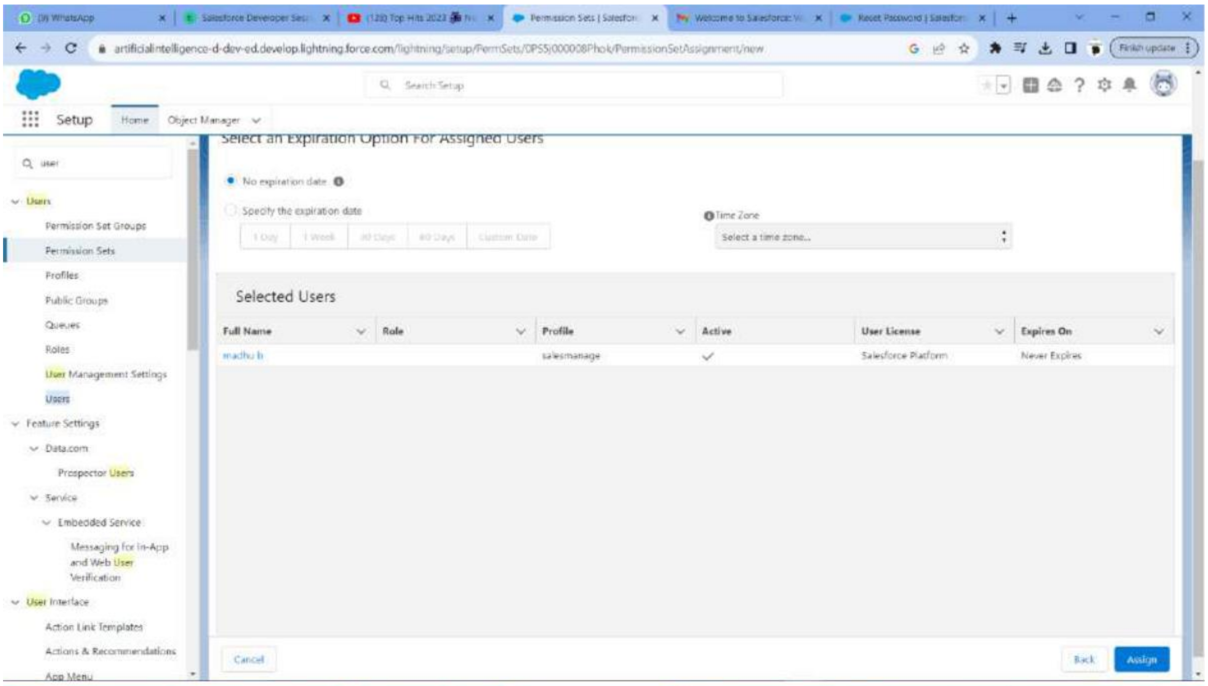
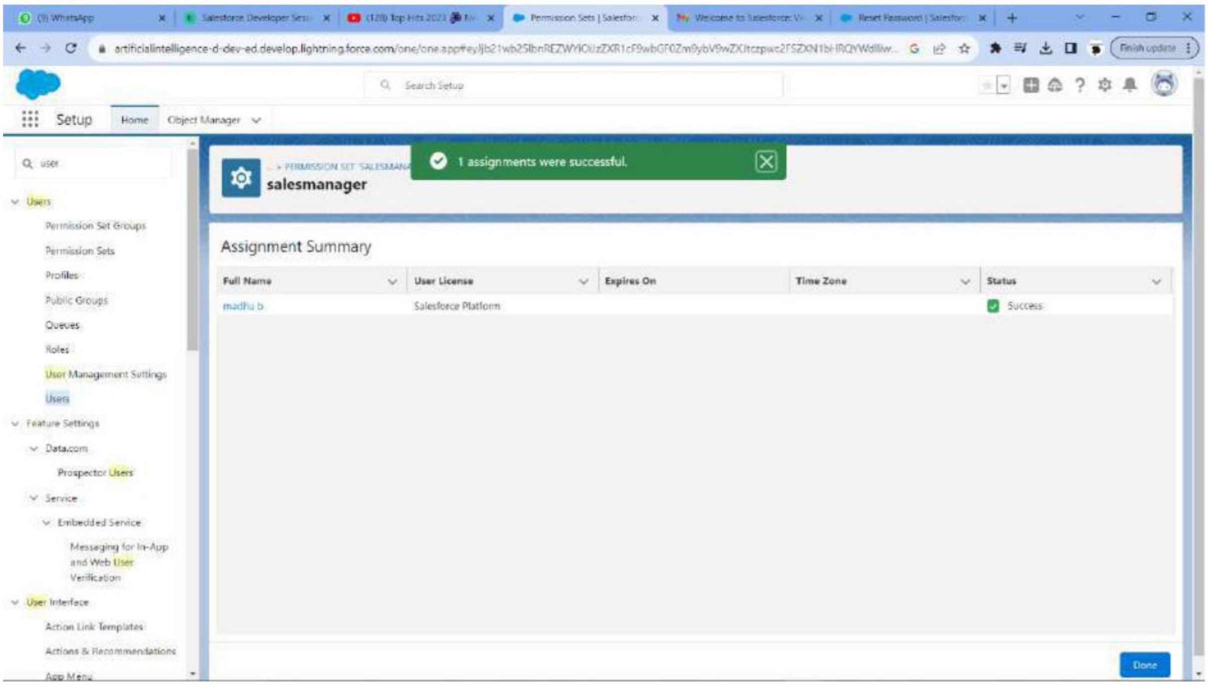

Setup
Home
Object Manager
SETUP
Permission Sets
Permission Set
salesmanager
Clone
Delete
Edit Properties
Manage Assignments
Video Tutorial | Help for this Page
Permission Set Overview > Object Settings
Object Settings
Object Name | Object Permissions | Total Fields | Tab Settings
Accounts | No Access | 40 | –
AI Insight Reasons | No Access | – | –
AI Record Insights | No Access | – | –
Alternative Payment Methods | No Access | 27 | –
API Anomaly Event Stores | No Access | 14 | –
App Analytics Query Requests | No Access | – | –
Application Usage Assignments | No Access | – | –
Appointment Categories | No Access | 3 | –
Appointment Invitations | No Access | 17 | –
Appointment Invitees | – | 4 | –
Appointment Schedule Aggregates | No Access | – | –
Appointment Schedule Logs | No Access | – | –
Appointment Topic Time Slots | No Access | 6 | –
Asset Actions | No Access | 30 | –
Asset Action Sources | No Access | 18 | –
Asset Relationships | – | 10 | –
Assets | No Access | 42 | –
Asset State Periods | No Access | 11 | –

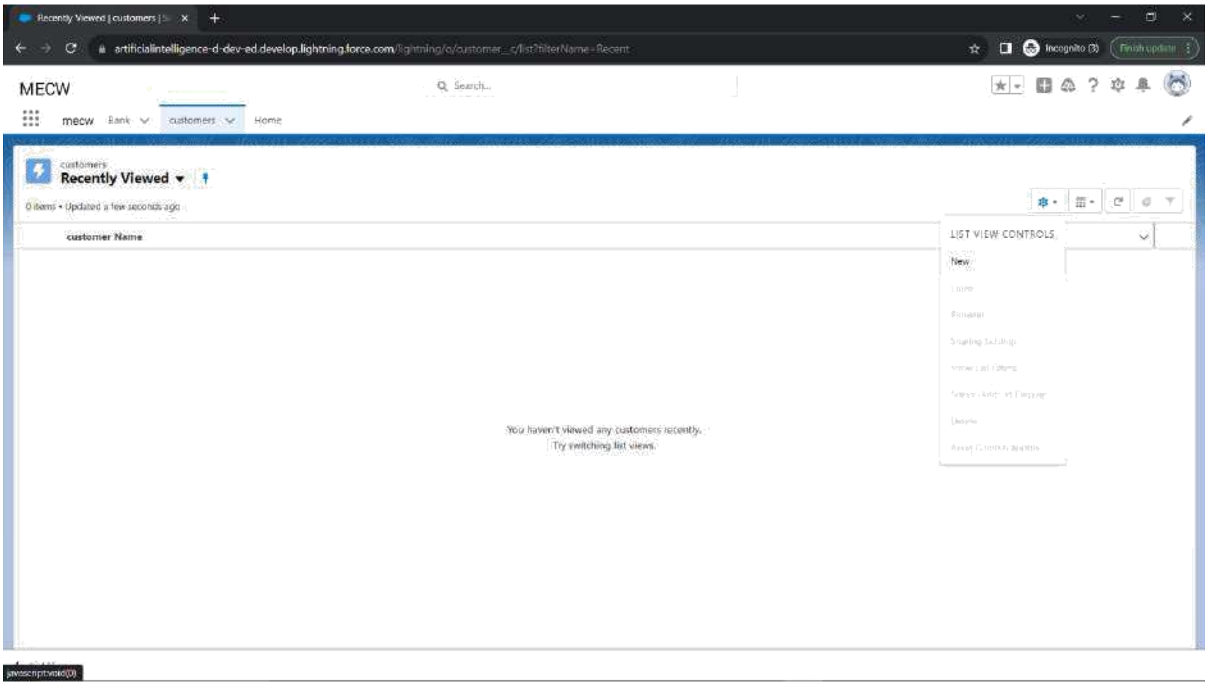

Setup
Home
Object Manager
Permission Sets
salesmanager
Permission Set Overview > Object Settings > Bank
Bank
Edit
Tab Settings
Available
Visible
Object Permissions
Permission Name
Enabled
Read
Create
Edit
Delete
View All
Modify All
Field Permissions
Field Name
Read Access
Edit Access
Bank Name
Created By
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings


Setup
Home
Object Manager
Permission Sets
salesmanager
Permission Set Overview > Object Settings > Bank
Bank
Save
Cancel
Tab Settings
Available
Visible
Object Permissions
Permission Name
Enabled
Read
Create
Edit
Delete
View All
Modify All
Field Permissions
Field Name
Read Access
Edit Access
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings


artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/0PS5j000000Phok/PermissionSetAssignment/home
Search Setup
Setup
Home
Object Manager
user
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Feature Settings
Data.com
Prospector Users
Service
Embedded Service
Messaging for In-App and Web User Verification
User Interface
Action Link Templates
Actions & Recommendations
App Menu
salesmanager
Current Assignments
Add Assignment
No assignments defined


artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/0PS5j000000Phok/PermissionSetAssignment/new
Search Setup
Setup
Home
Object Manager
Select Users to Assign
All Users
1 item selected
Full Name
Username
Role
Profile
Amelia Ellington
Chatter Expert
Diya Adarna
GOPAL S
Integration User
madhu b
Security User
sowmiya bala
Force.com - App Subscription User
Chatter Free User
System Administrator
Analytics Cloud Integration User
salesmanage
Analytics Cloud Security User
Manager
Cancel
Next


Select an Expiration Option For Assigned Users
No expiration date
Specify the expiration date
Time Zone
Select a time zone...
Selected Users
Full Name
Role
Profile
Active
User License
Expires On
madhu b
salesmanage
Salesforce Platform
Never Expires
Cancel
Back
Assign

1 assignments were successful.
salesmanager
Assignment Summary
Full Name
User License
Expires On
Time Zone
Status
madhu b
Salesforce Platform
Success
Done



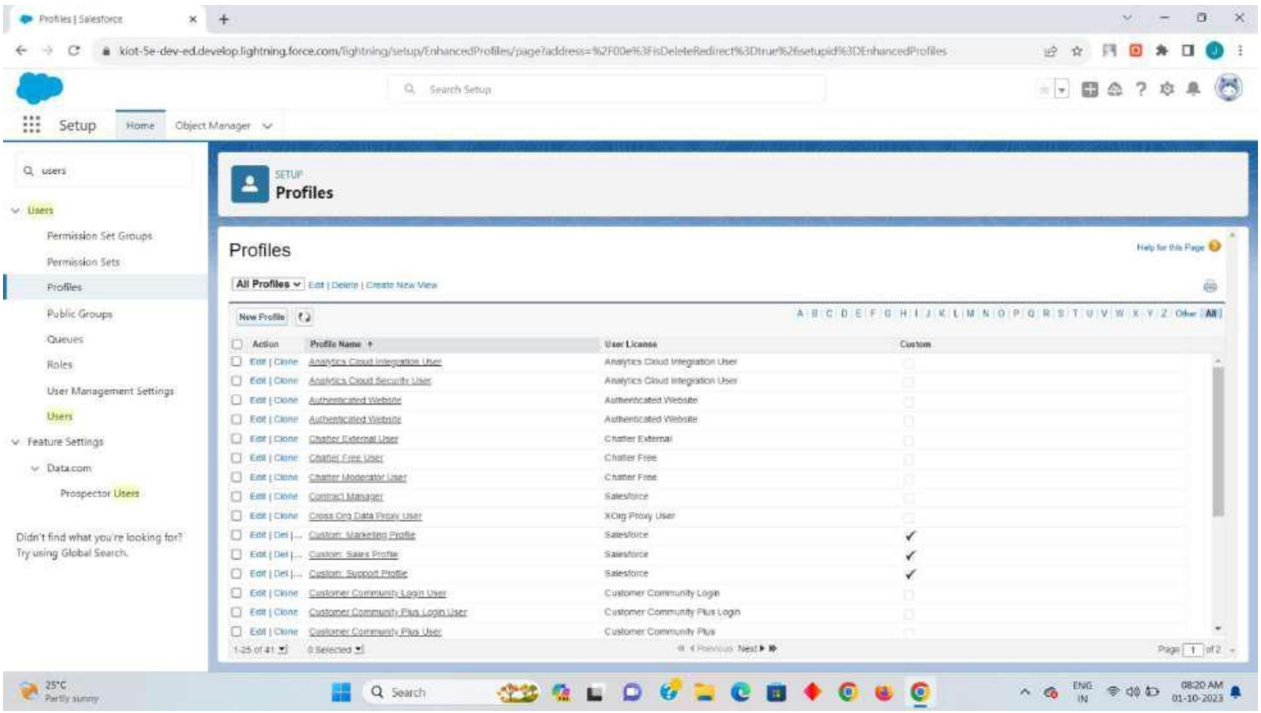
Recently Viewed | customers
artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/o/customer__c/list?filterName=Recent
MECW
Search...
mecw
Bank
customers
Home
customers
Recently Viewed
0 items • Updated a few seconds ago
customer Name
LIST VIEW CONTROLS
New
You haven't viewed any customers recently.
Try switching list views.
javascript:void(0)

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

Solution:

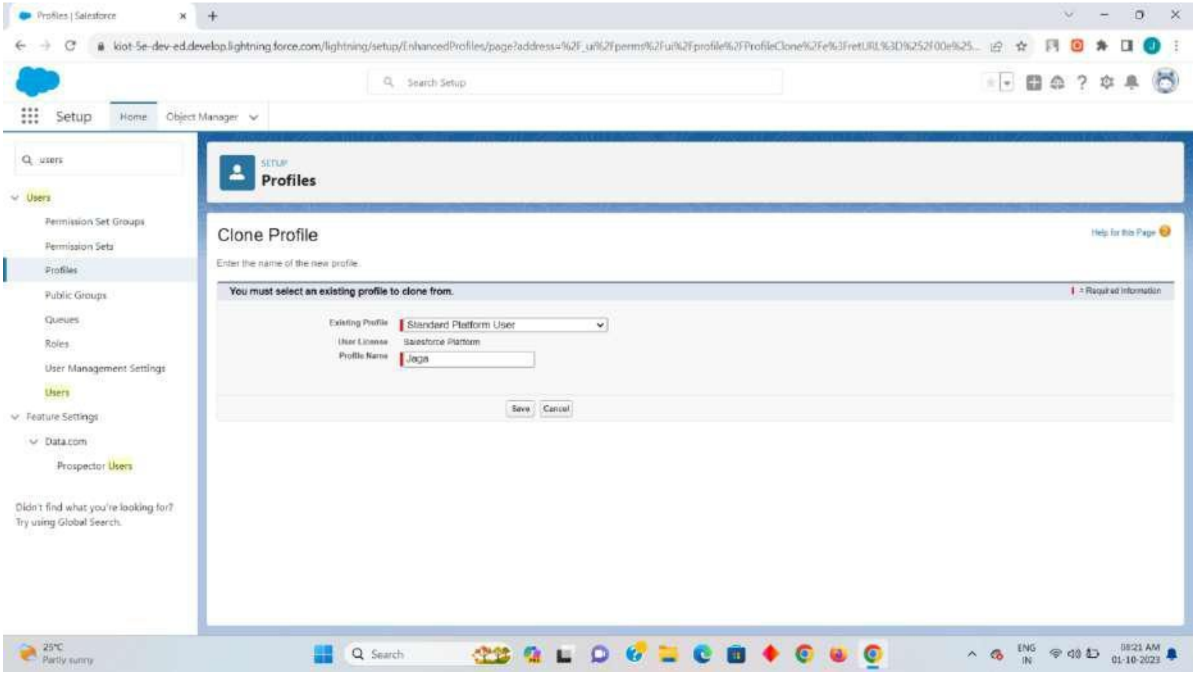
Step 1: we need create a profile for the two user which has the access to Create, Read, Edit for follow as per.

<u>Setup-quick search[profile]</u>



Step 2:

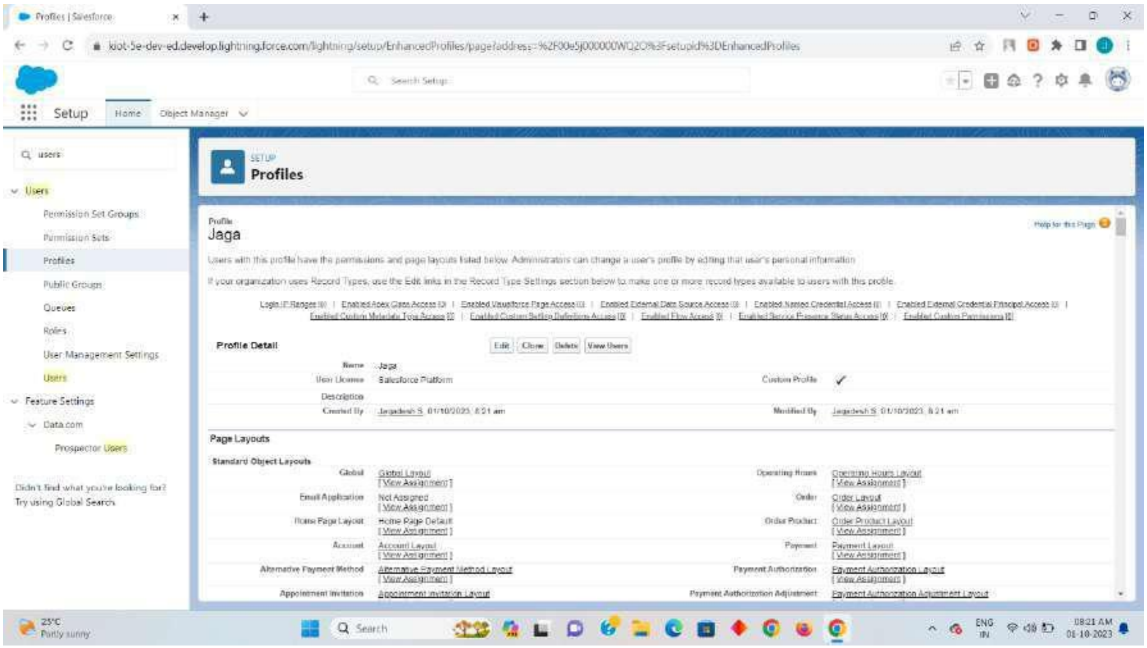
Click on the new to create a new profile along with the label and Api

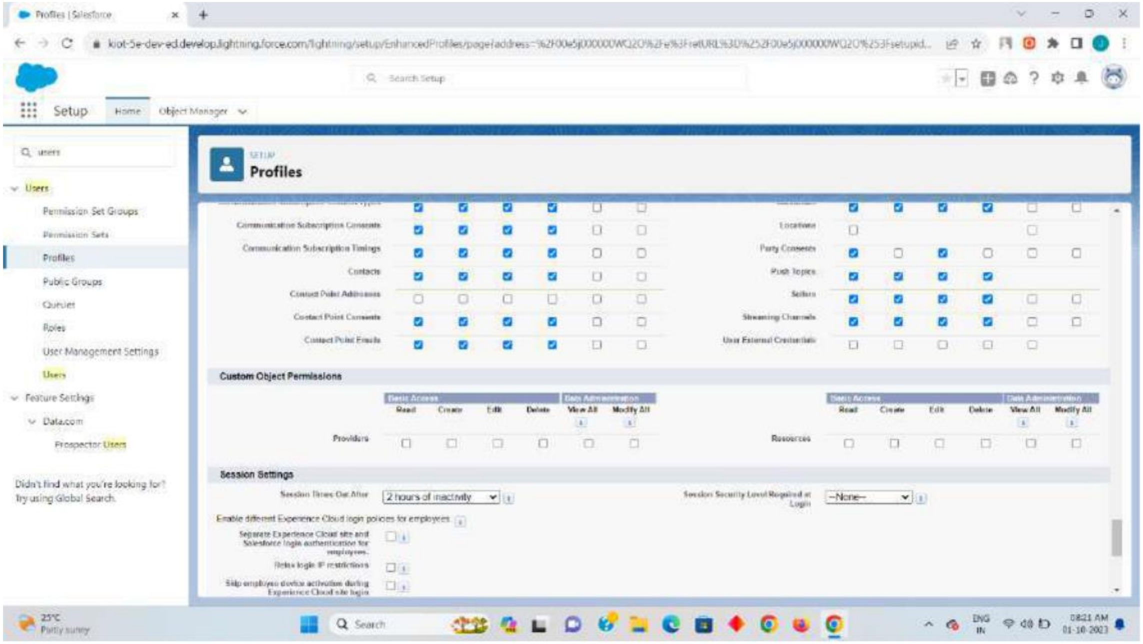


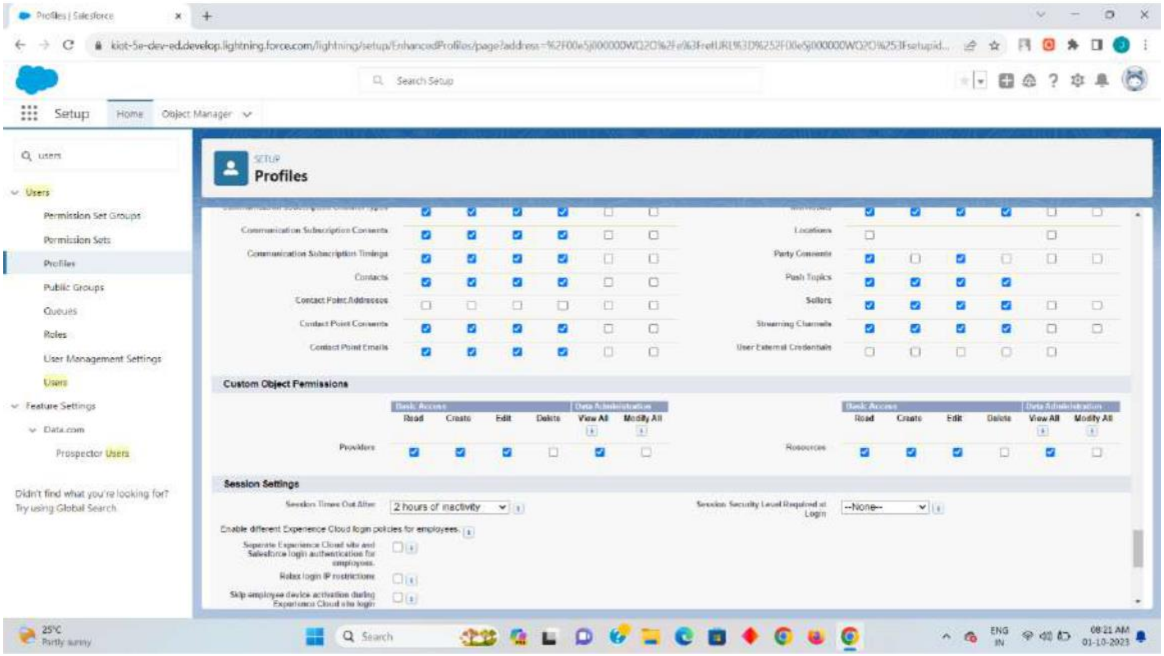
Here I had made it my profile name as Jaga and the existing profile as Standard Platform User.

Step 3:

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




Profiles | Salesforce
Setup
Home
Object Manager
Profiles
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Feature Settings
Data.com
Prospector Users
Didn't find what you're looking for?
Try using Global Search.
Custom Object Permissions
Basic Access
Data Administration
Read
Create
Edit
Delete
View All
Modify All
Providers
Resources
Session Settings
Session Times Out After
2 hours of inactivity
Session Security Level Required at Login
--None--


Profiles | Salesforce
Setup
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Profiles
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Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Feature Settings
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Custom Object Permissions
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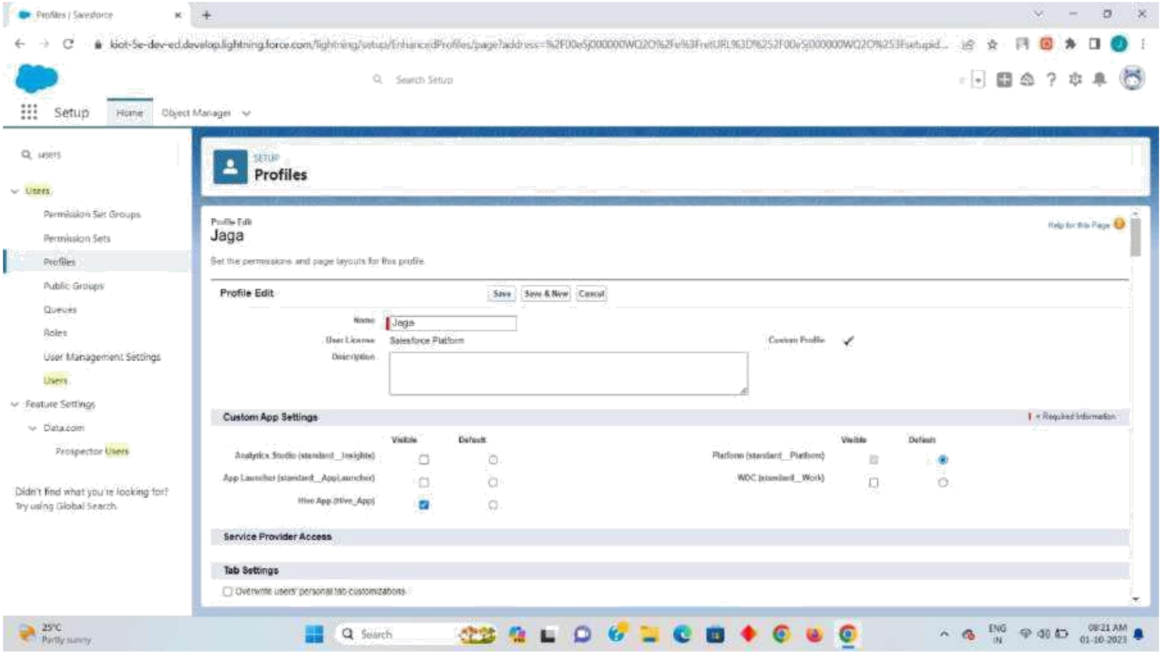
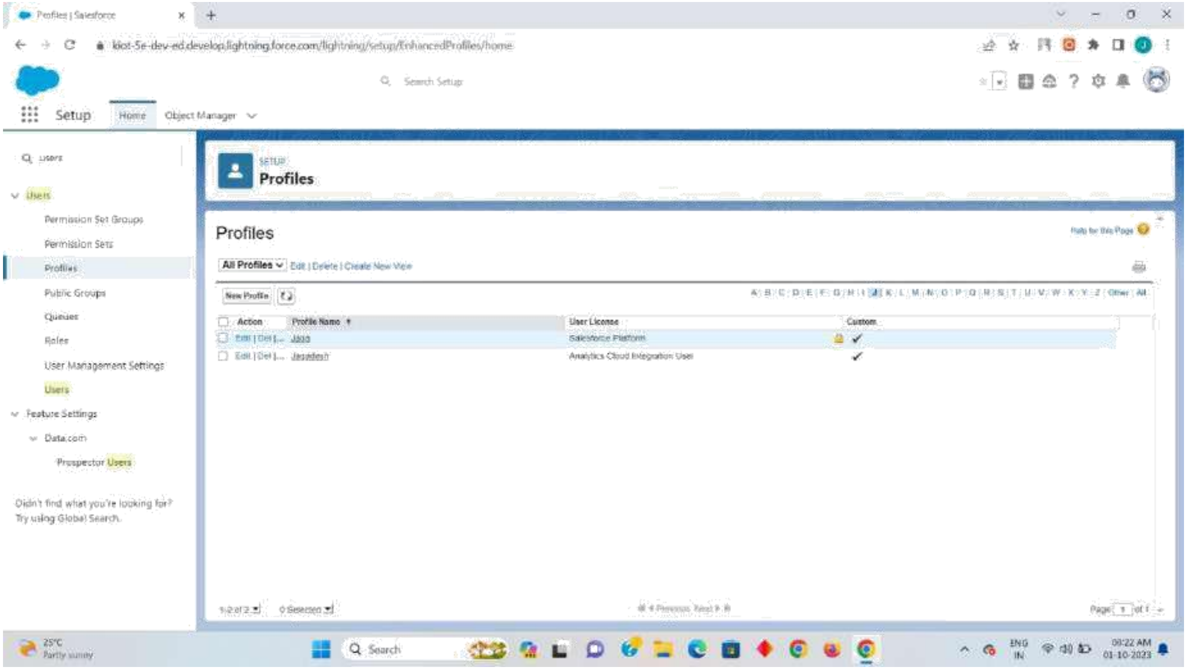
Read
Create
Edit
Delete
View All
Modify All
Providers
Resources
Session Settings
Session Times Out After
2 hours of inactivity
Session Security Level Required at Login
--None--



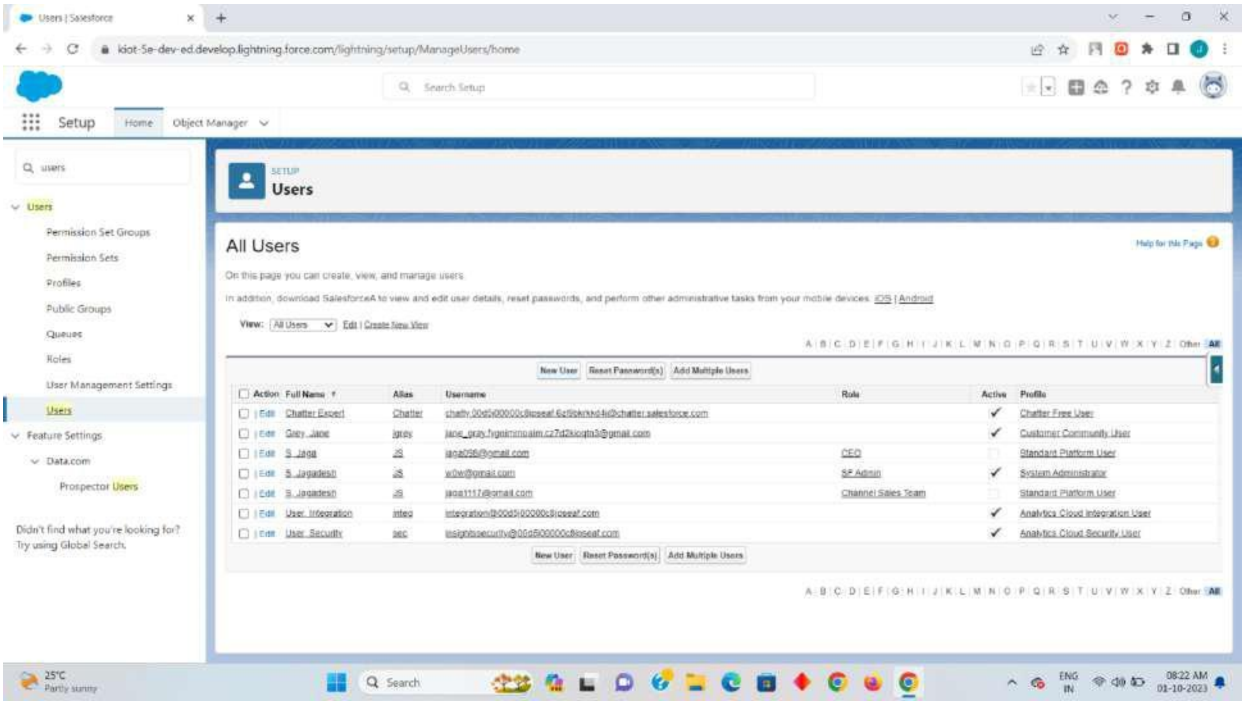
Step 4

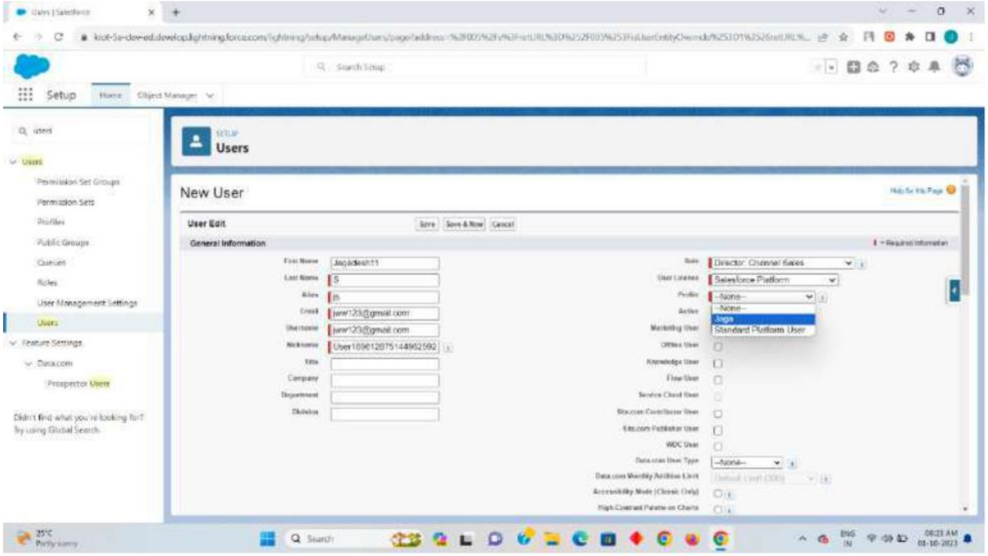
Now you can preview your created profile on the profile option here my profile name jaga has been created with the access of read,create,edit along with view on it

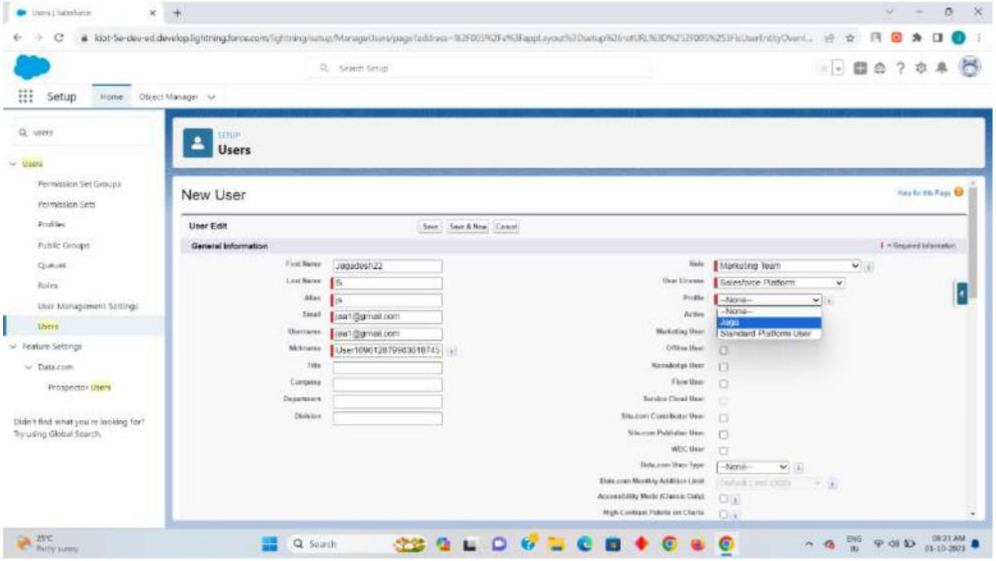


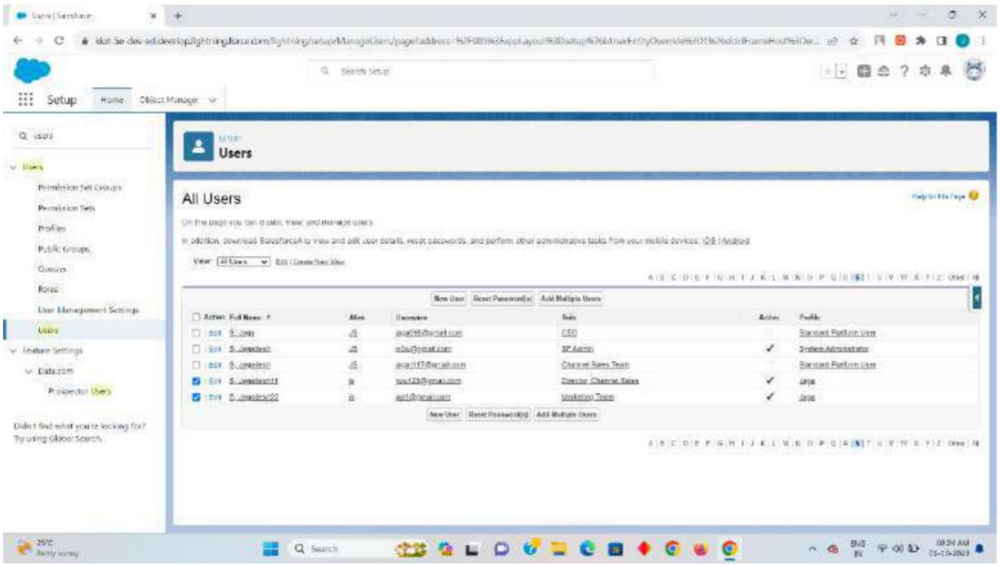
Step 5:

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




Setup
Users
New User
User Edit
General Information
Jagadesh11
Director, Channel Sales
Salesforce Platform
--None--
Jaga
Standard Platform User


Setup
Users
New User
User Edit
General Information
Jagadesh22
Marketing Team
Salesforce Platform
--None--
Jaga
Standard Platform User

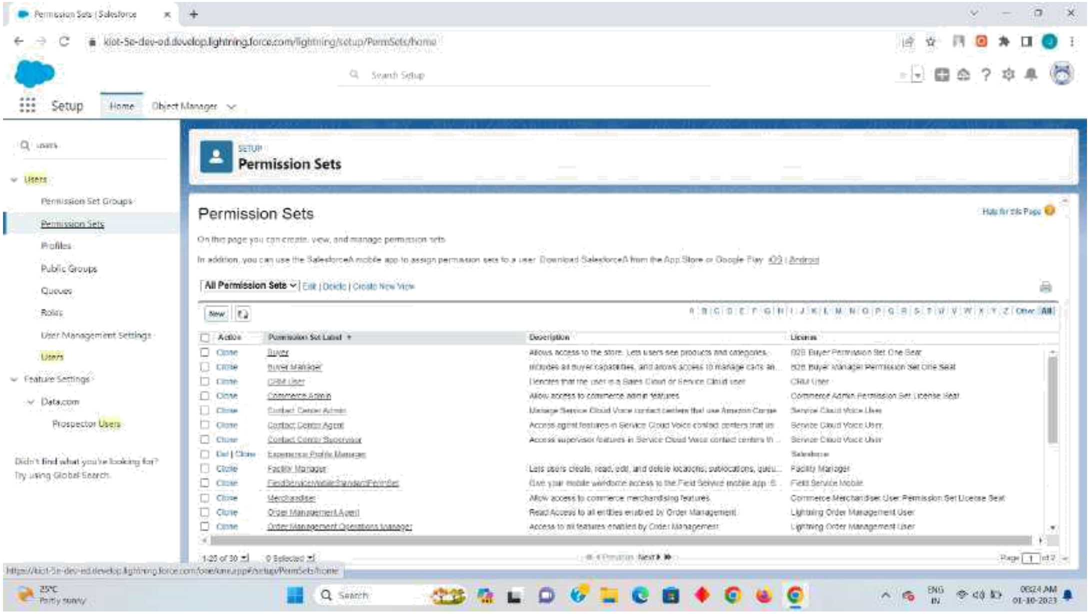

Setup
Users
All Users
New User
Reset Password(s)
Add Multiple Users
Action
Full Name
Alias
Username
Role
Active
Profile
CEO
Channel Sales Team
Director, Channel Sales
Marketing Team
Standard Platform User
Jaga

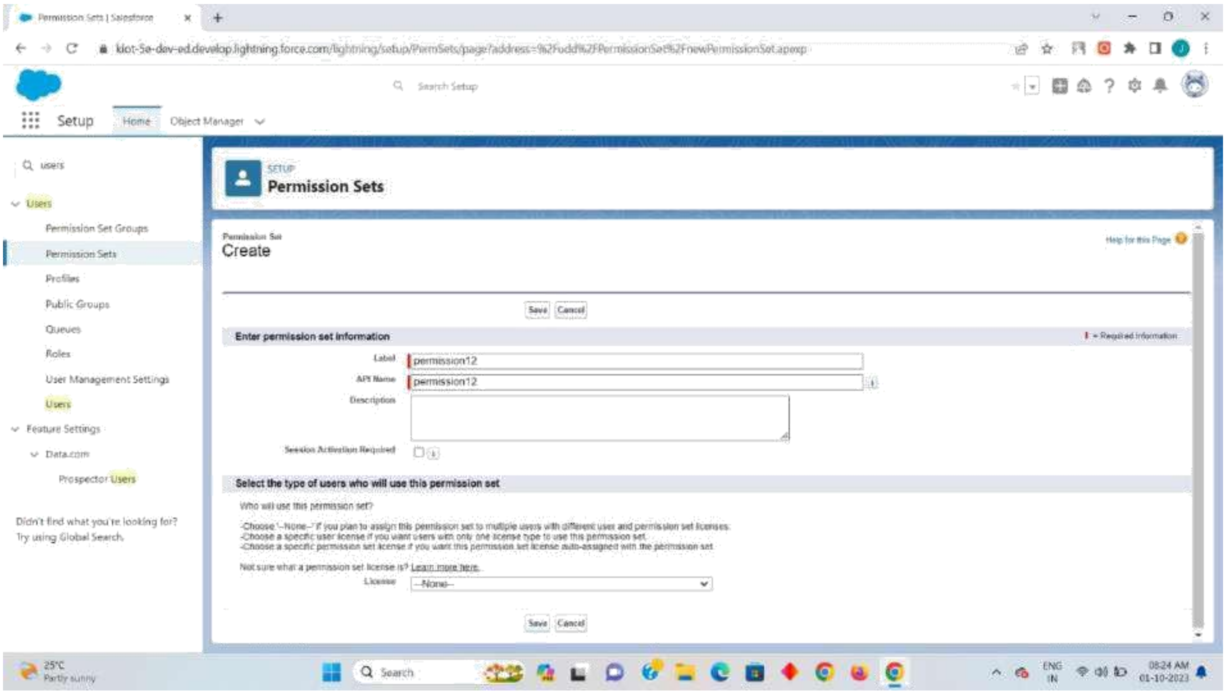
Now you can preview your two user that you have created in my side I had create the two users a Jagadesh11 and Jagadesh22 as a director channel sales with the marketing team.

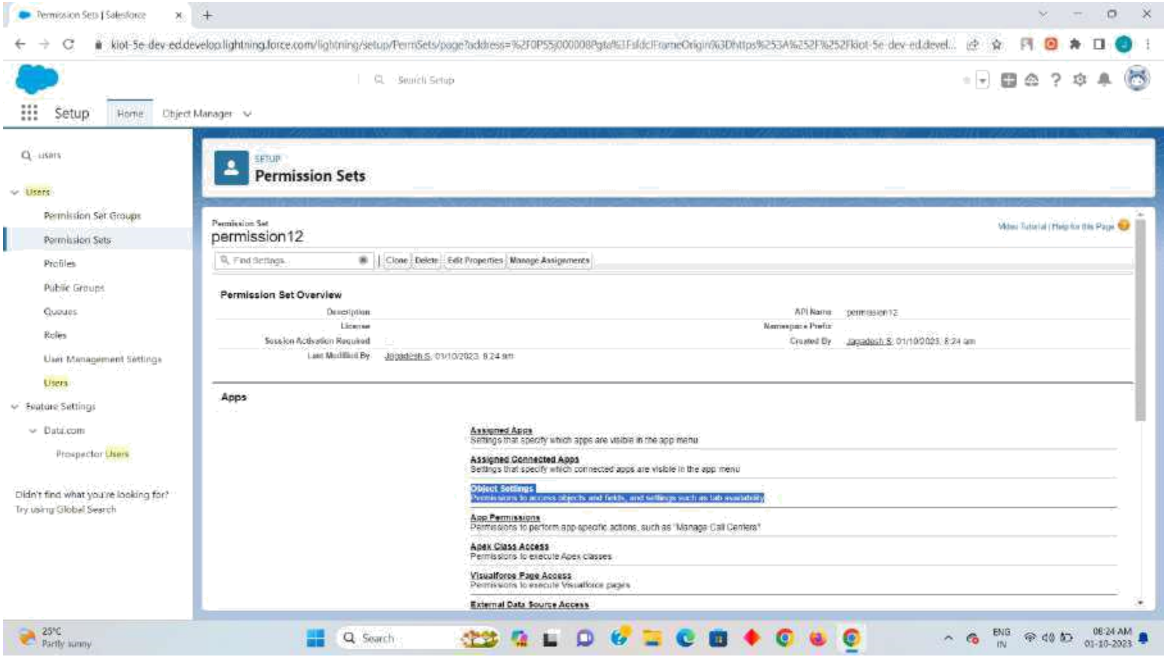
Step 6:

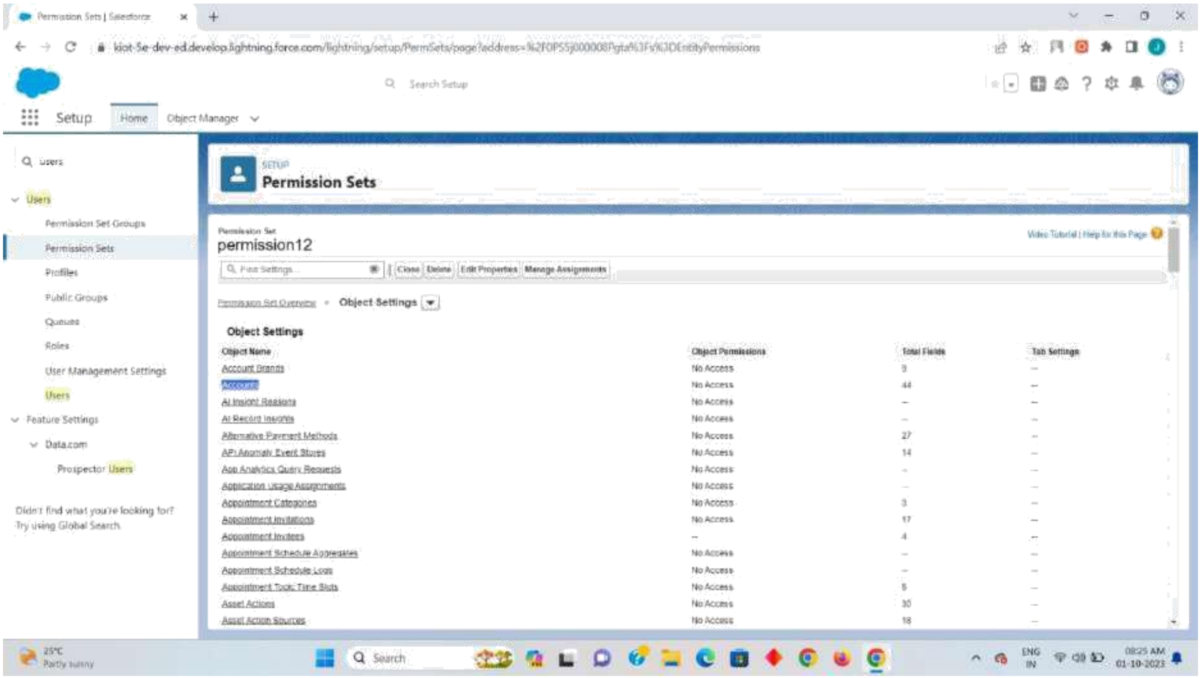
Now the two user as been created with the profle so that two user can perform the Create, Read, Edit and view on both the user. So as per the given task we need to allocate a specific access as delete on one user for that we need create a permission set for one user so it can created as

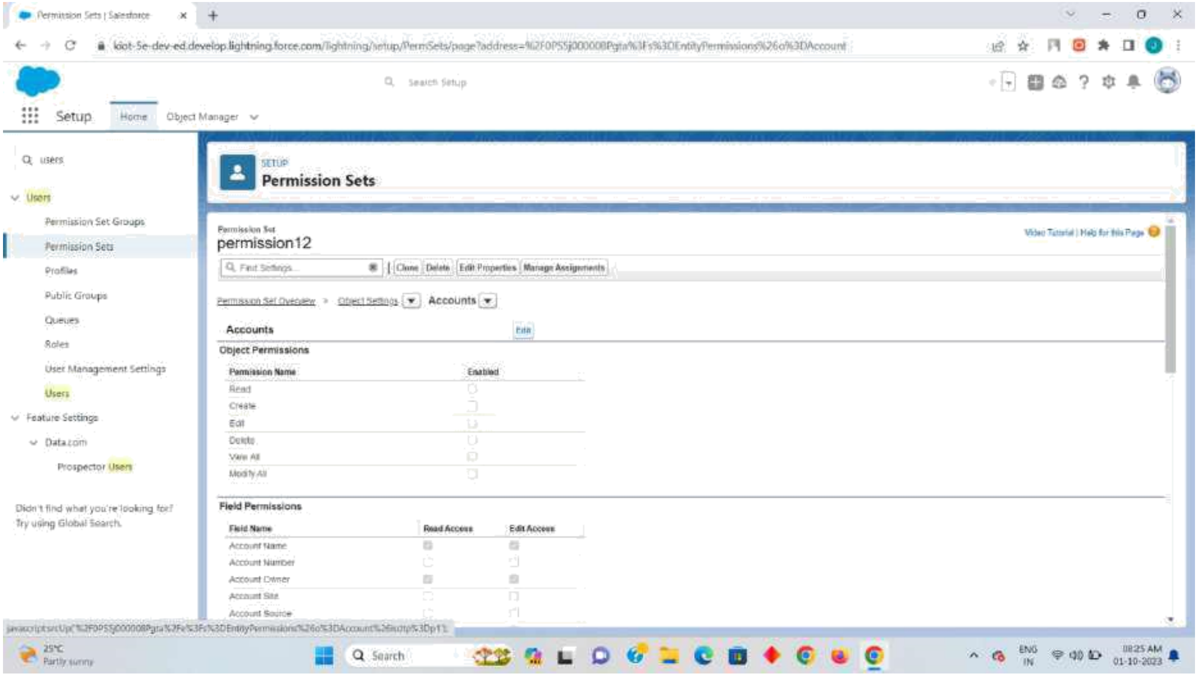
<u>setup-quick search[permission set]-new-fill label name [auto select the API name]-click on save-object settings-accounts.</u>


Permission Sets | Salesforce
Setup
Home
Object Manager
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Feature Settings
Data.com
Prospector Users
Didn't find what you're looking for?
Try using Global Search.
SETUP
Permission Sets
Permission Sets
On this page you can create, view, and manage permission sets.
All Permission Sets
New
Action
Permission Set Label
Description
License


Permission Sets | Salesforce
Setup
Home
Object Manager
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Feature Settings
Data.com
Prospector Users
Didn't find what you're looking for?
Try using Global Search.
SETUP
Permission Sets
Permission Set
Create
Save
Cancel
Enter permission set information
Label
permission12
API Name
permission12
Description
Session Activation Required
Select the type of users who will use this permission set
Who will use this permission set?
License
--None--
Save
Cancel

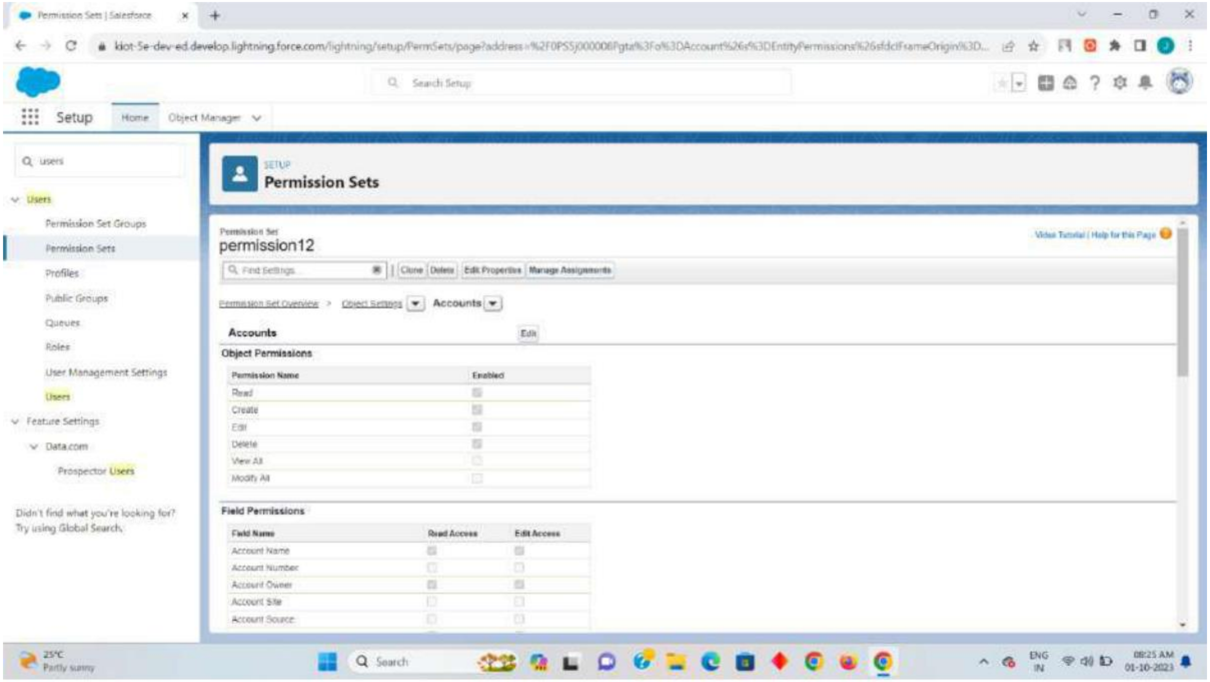

Permission Sets | Salesforce
Setup
Home
Object Manager
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Feature Settings
Data.com
Prospector Users
Didn't find what you're looking for?
Try using Global Search
SETUP
Permission Sets
permission12
Clone
Delete
Edit Properties
Manage Assignments
Permission Set Overview
Apps
Assigned Apps
Settings that specify which apps are visible in the app menu
Assigned Connected Apps
Settings that specify which connected apps are visible in the app menu
Object Settings
App Permissions
Apex Class Access
Permissions to execute Apex classes
Visualforce Page Access
Permissions to execute Visualforce pages
External Data Source Access

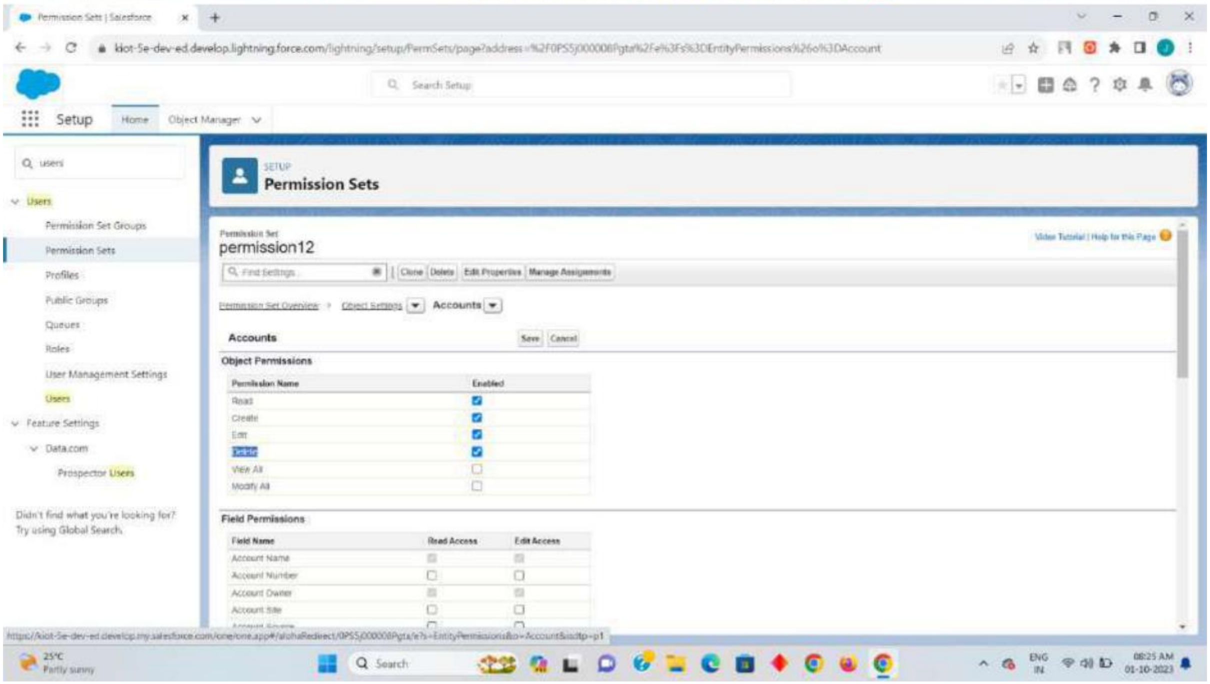

Permission Sets | Salesforce
Setup
Home
Object Manager
SETUP
Permission Sets
permission12
Object Settings
Object Name
Object Permissions
Total Fields
Tab Settings
Account Brands
Accounts
AI Insight Reasons
AI Record Insights
Alternative Payment Methods
API Anomaly Event Stores
App Analytics Query Requests
Application Usage Assignments
Appointment Categories
Appointment Invitations
Appointment Invitees
Appointment Schedule Aggregates
Appointment Schedule Logs
Appointment Topic Time Slots
Asset Actions
Asset Action Sources
No Access



Step 7:

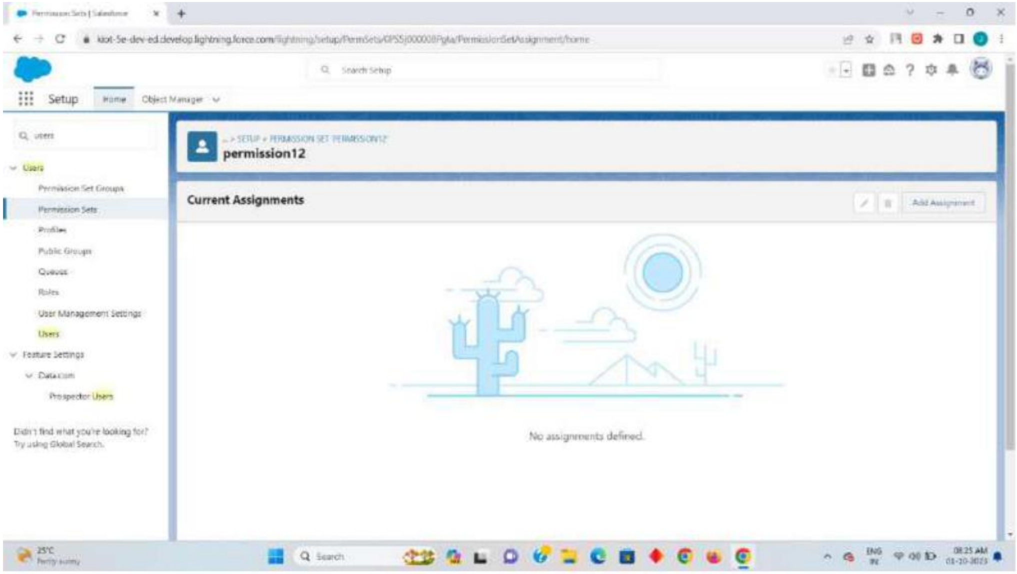
Now to give the specific delete access to the user click on edit on the Account and then enable the read,create,edit and the delete on it so that the permission set will have a specific special access on it. once it has been done click on save and then click on manage assignment.

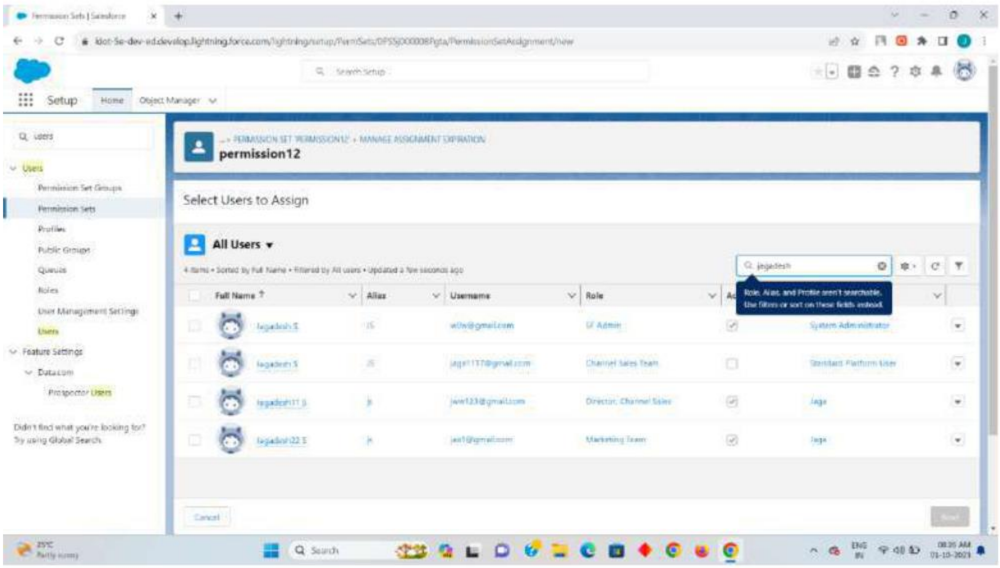


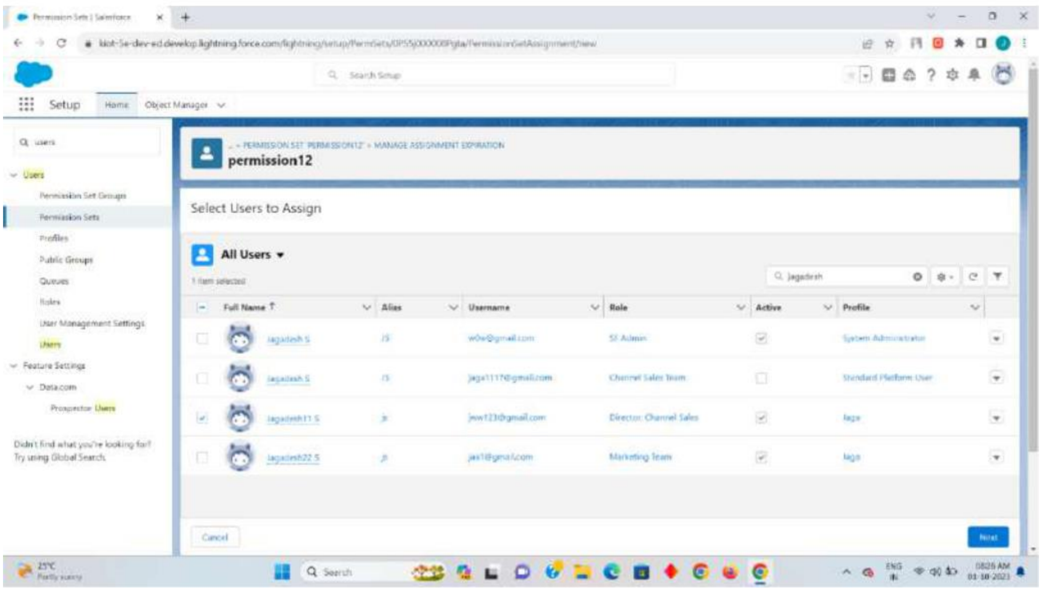


Step 8

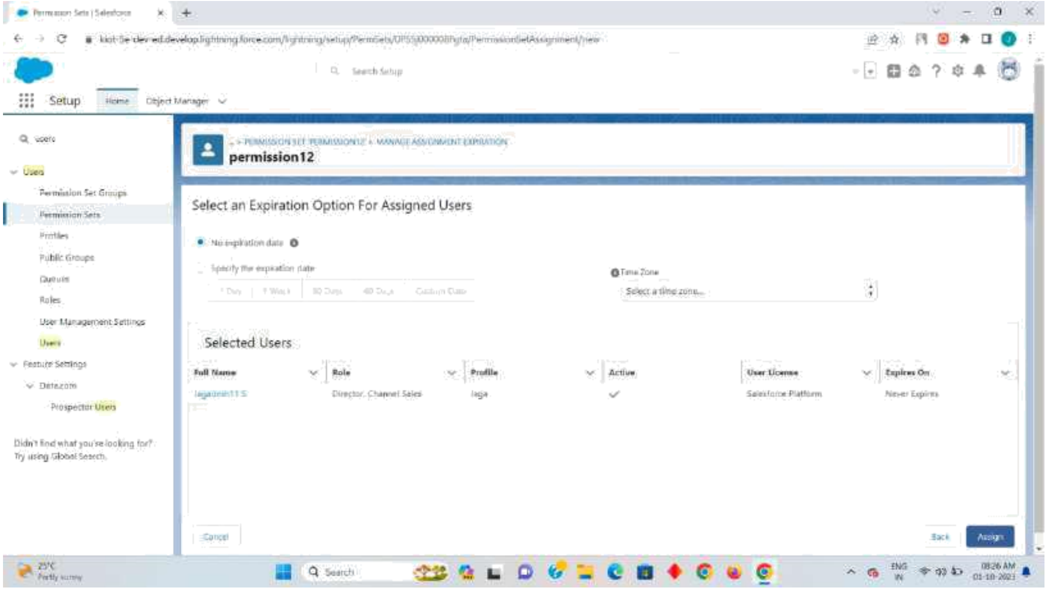
Now click on add assignment there you will find your two created users click on any one user to give a special access as delete on it and then click on assign so that the specific selected user can have a special access as delete on it.



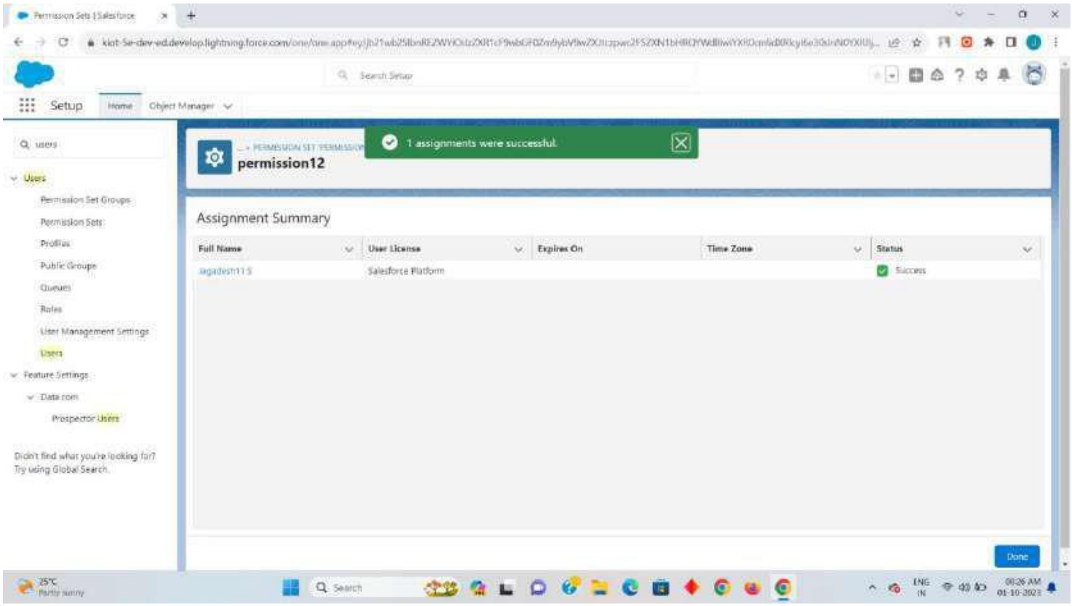




Click on next.



Now click on Assign.



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

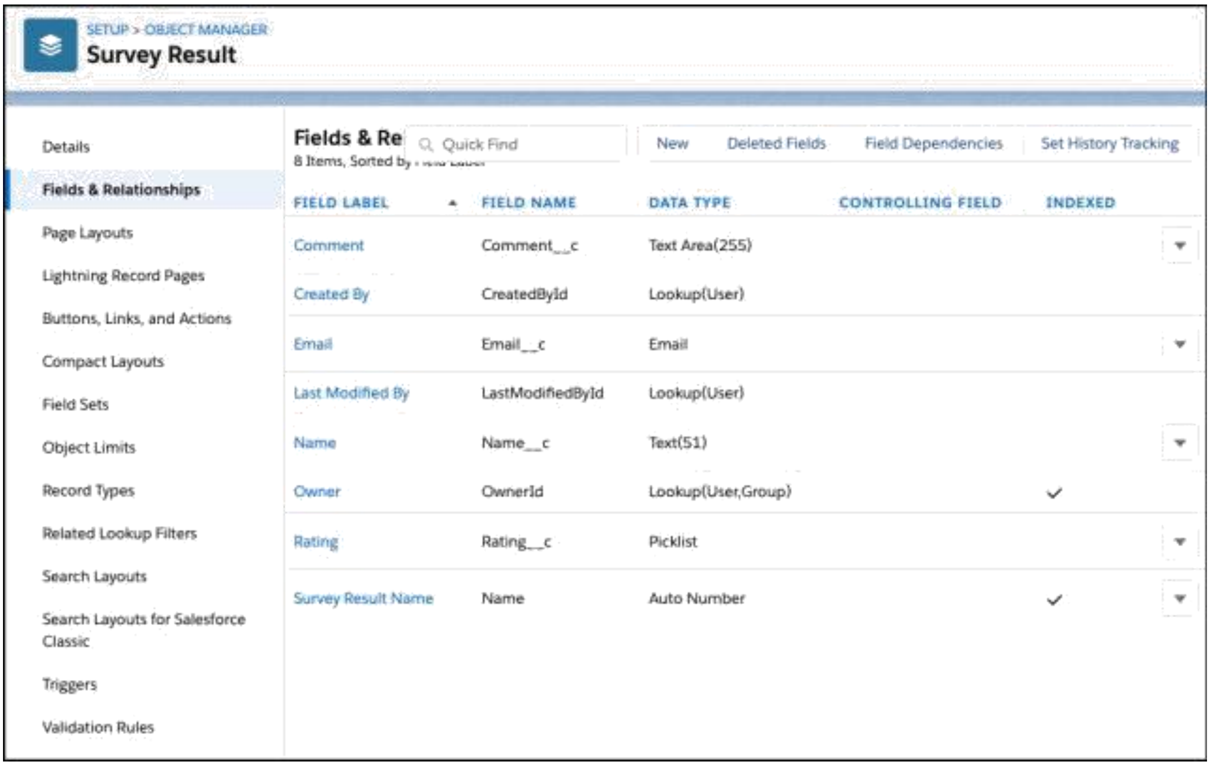
4.Create a screen flow for a basic survey to fill in the details for any form.

Solution:

Step 1: Create a Custom Object

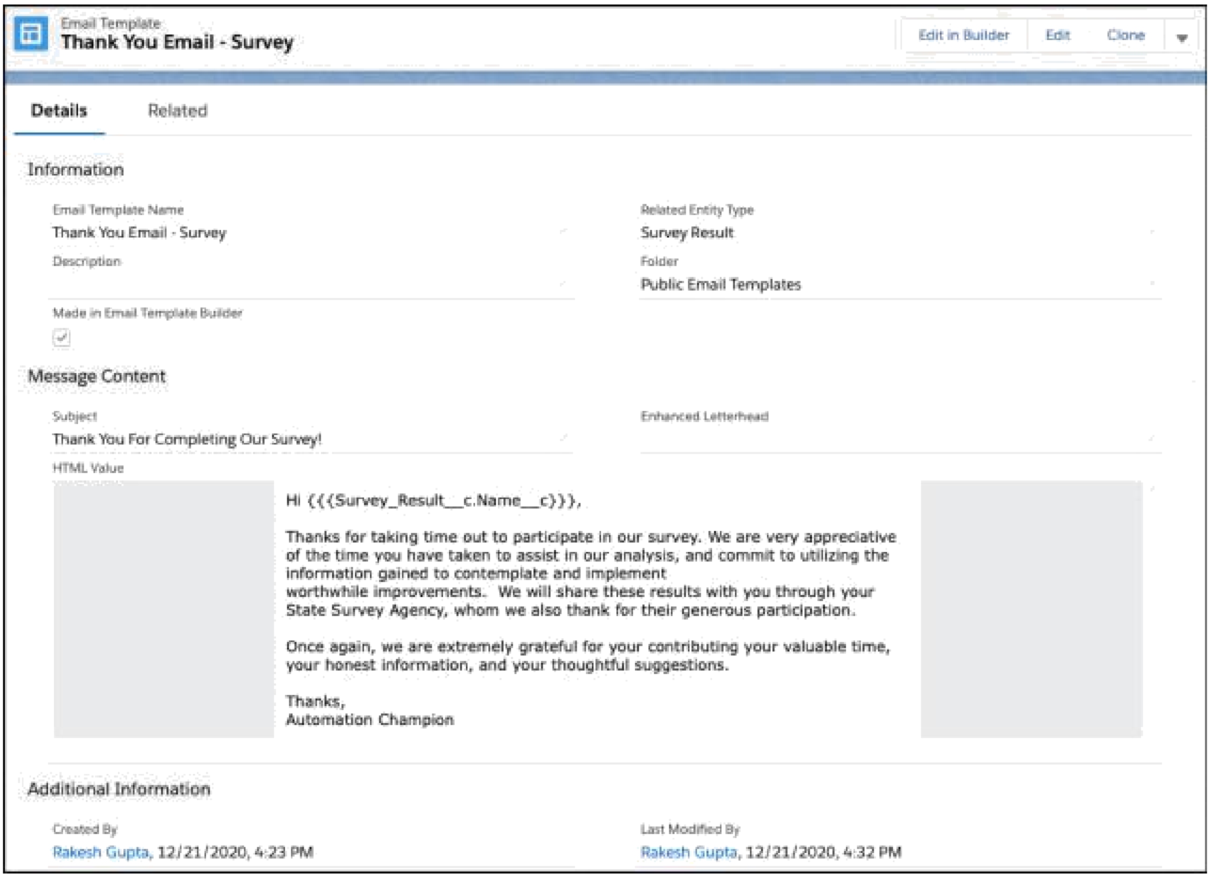
The next step is to create a custom object **Survey Result** and a few custom fields to store survey responses.

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



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

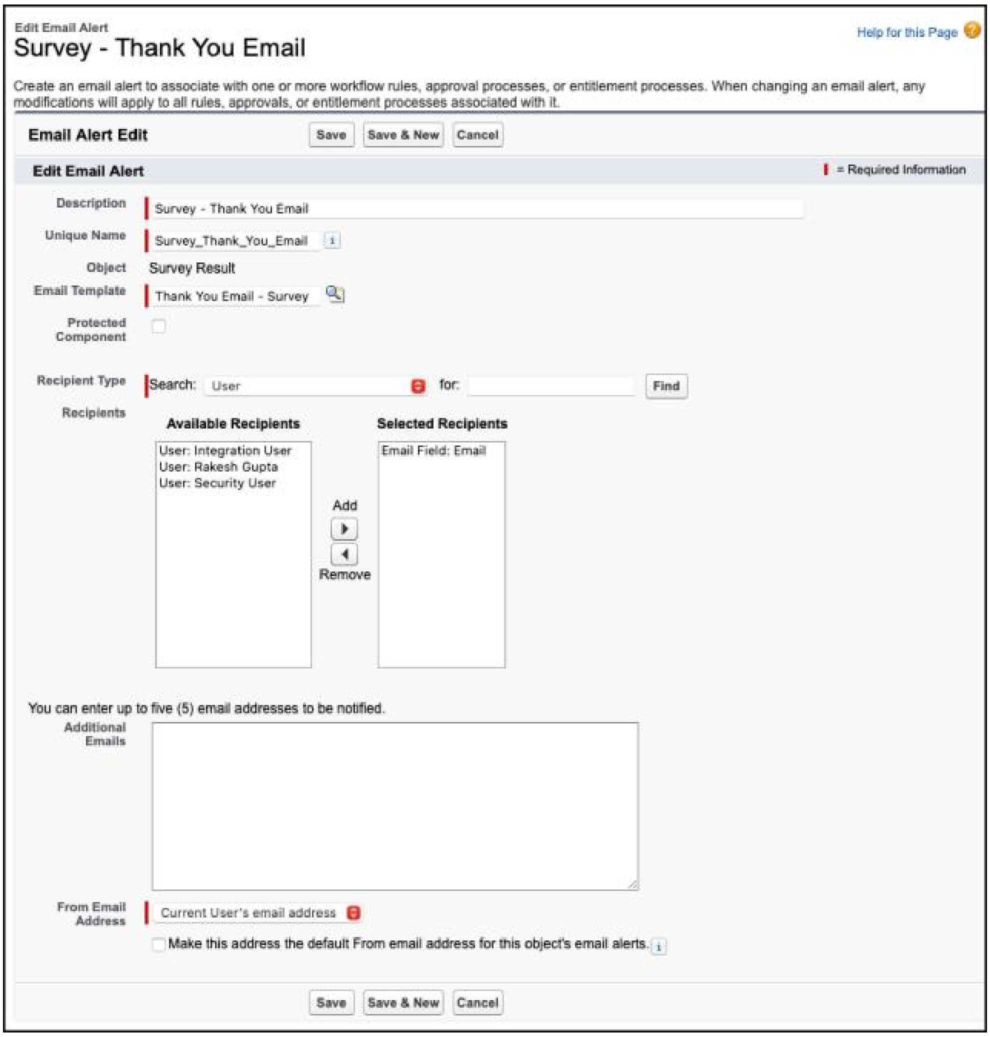
1. Click **App Launcher**.
2. In the Quick Find box, type **Email Templates**.
3. Clicks on the **New Email template** button.
4. **Name** the **Lightning Email Template** and make sure to store it in the **Public Email Templates** folder**.**
5. Create a template like the following screenshot.



Step 3: Create an Email Alert

1. Click **Setup**.
2. In the Quick Find box, type **Email Alerts**.
3. Select **Email Alerts**, click on the **New Email Alert** button.
4. **Name** the **Email Alert** and click the Tab button. The **Unique Name** will populate.

5. For **Object** select **Survey Result.**
6. For the **Email Template** chooses **Lightning Email Template Thank You Email – Survey**.
7. For **Recipient Type** select **Email Field: Email.**
8. Click **Save**.



Step 4.1: Salesforce Flow — Create a Screen that Allow Users to Fill Survey

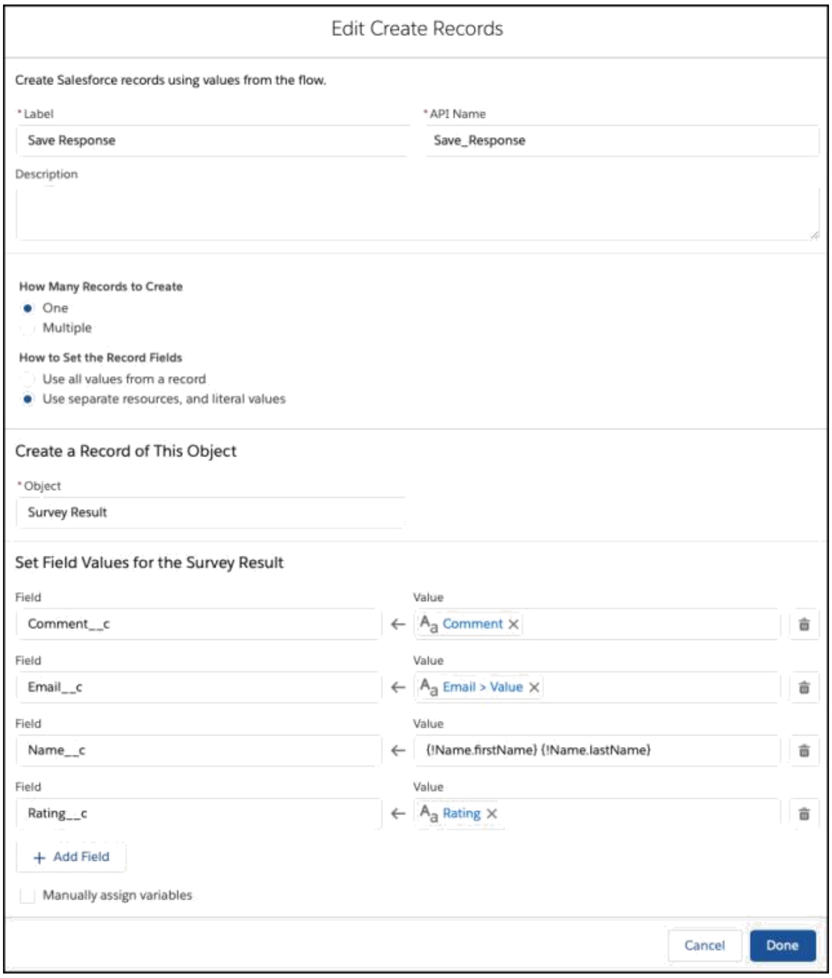
1. Click **Setup**.

2. In the Quick Find box, type **Flows**.
3. Select **Flows** then click on the **New Flow**.
4. Select the **Screen Flow** option and click on **Next** and configure the flow as follows:
    1. **How do you want to start building**: **Freeform**
5. We will use the **Screen** element to capture a **Survey response** form. Drag and drop a **Screen** element onto the canvas.

Step 4.2: Salesforce Flow — Add a Record Creates Element to Save Survey Response

1. Drag-and-drop the **Create Records** element onto the Flow designer.
2. Enter a name in the **Label** (**Save Response**) field; the **API Name** will auto-populate.
3. For **How Many Records to Create** – select **One.**
4. For **How to Set the Record Fields** – select **Use separate resources, and literal values.**
5. Select the **Survey_Result__c** object from the dropdown list.
6. **Set Field Values for the Survey Result**
    1. Row 1:
        1. **Field: Comment__c**

      2. **Value: {!Comment}**
   2. Click **Add Row**
   3. Row 2:
      1. **Field: Email__c**
      2. **Value: {!Email.value}**
   4. Click **Add Row**
   5. Row 3:
      1. **Field: Name__c**
      2. **Value: {!Name.firstName} {!Name.lastName}**
   6. Click **Add Row**
   7. Row 3:
      1. **Field: Rating__c**
      2. **Value: {!Rating}**
7. Click **Done**.

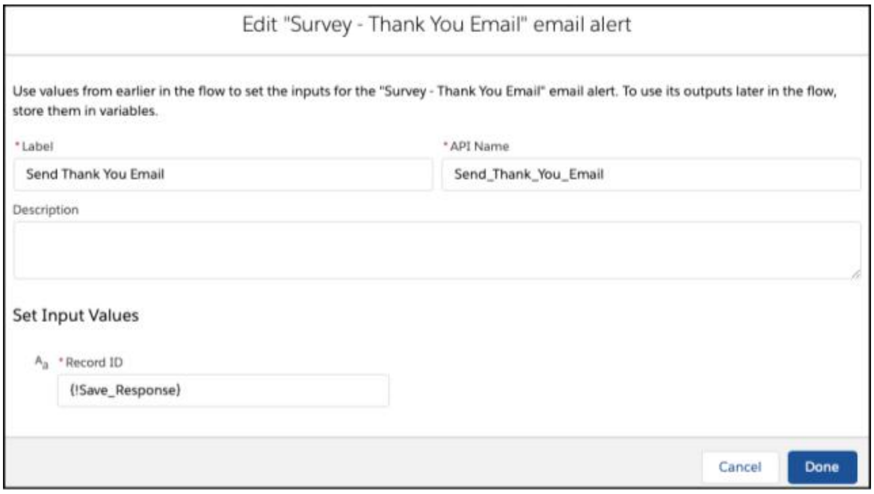


Step 4.3: Salesforce Flow — Call an Acton — Email Alert to Send Out Thank You Email

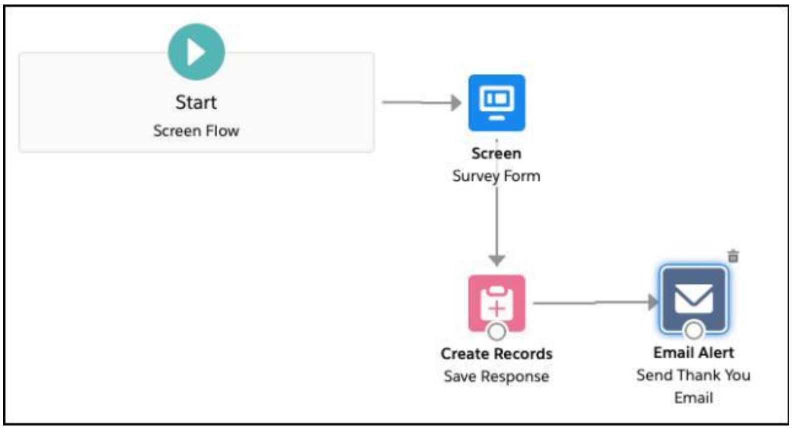
The next step is to call the **Survey – Thank You Email** email alert from flow so that when flow fires it triggers the thank you email to survey participants.

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

4. Clicks on the **Survey – Thank You Email** email alert.
5. Click **Done**.

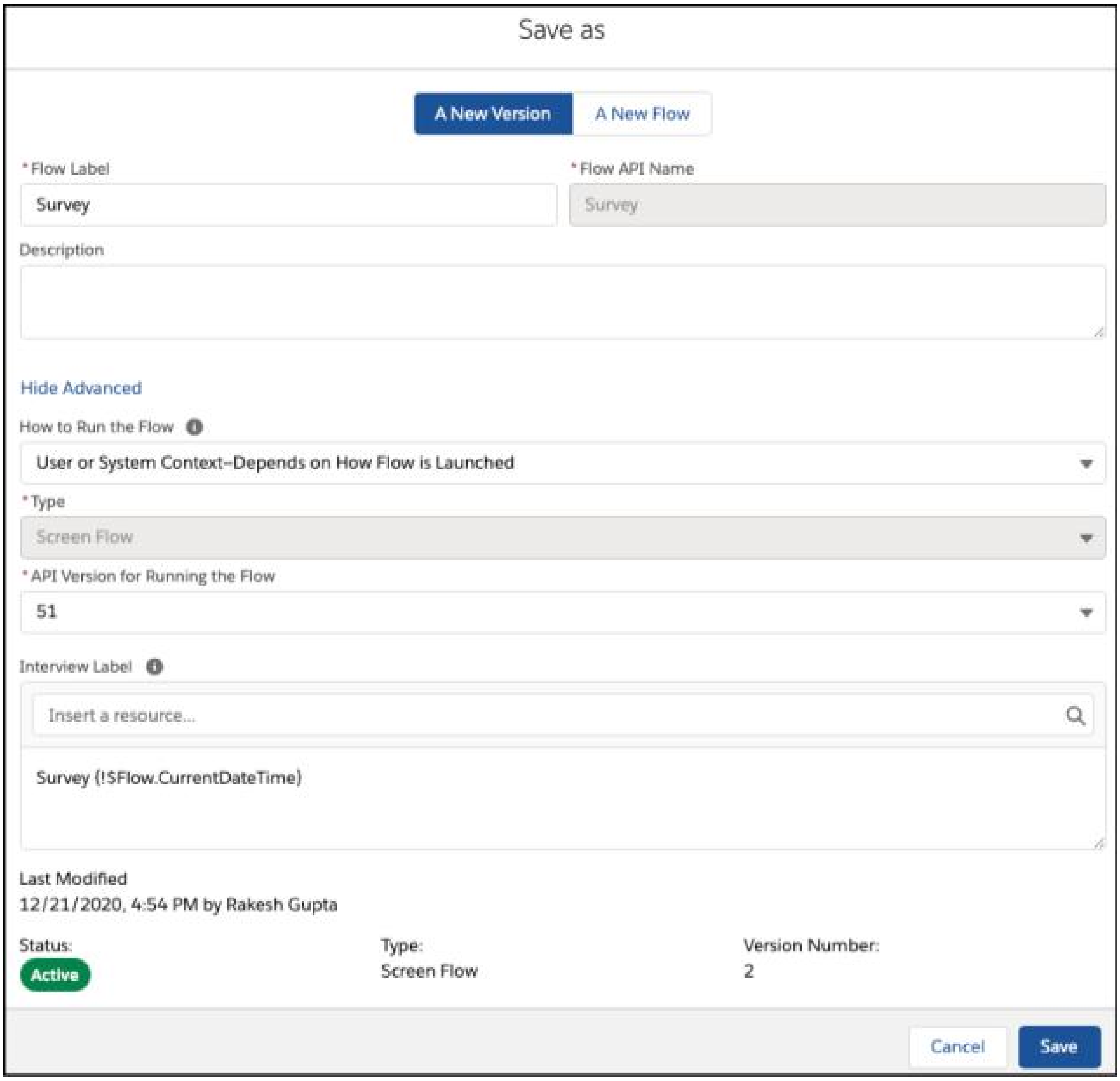


In the end, Sergio's **Flow** will look like the following screenshot:



1. Click **Save**.
2. Enter **Flow Label** the **API Name** will auto-populate.
3. Click **Show Advanced**.

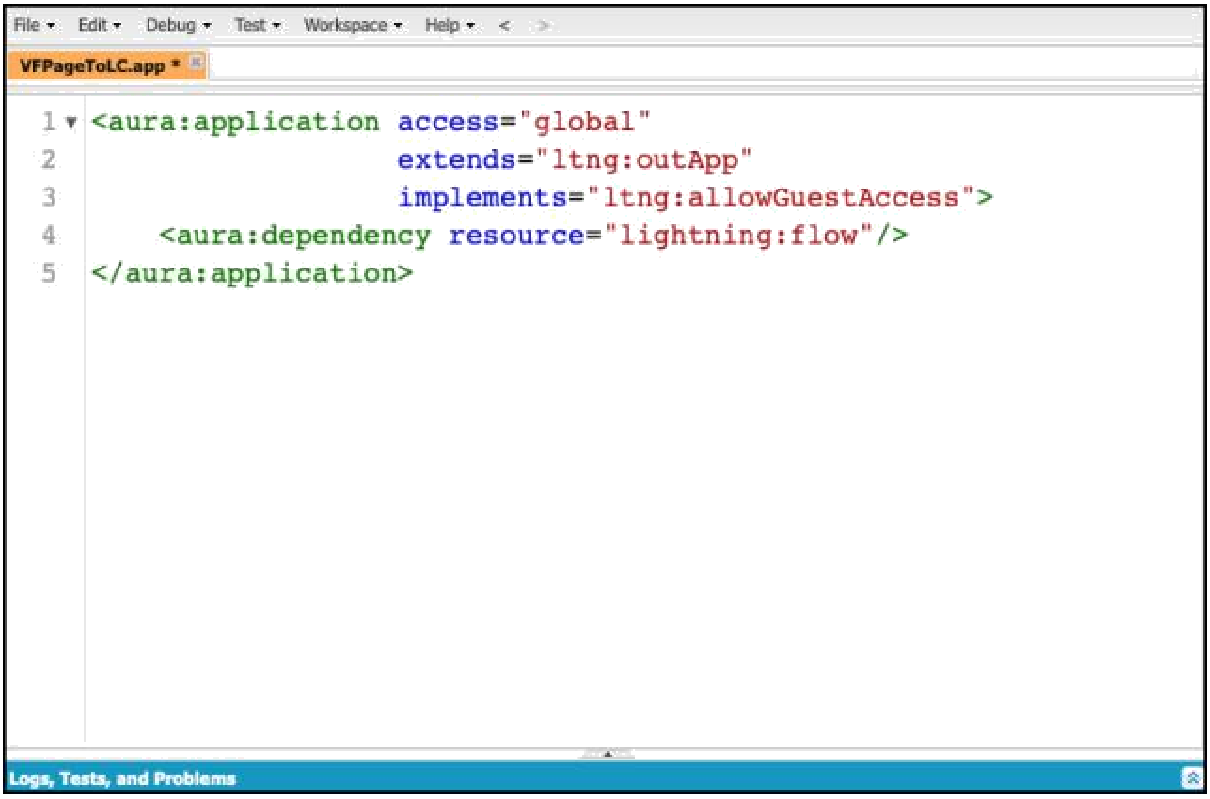
4. **How to Run the Flow**: **User or System Context—Depends on How Flow is Launched**
5. **Type**: **Screen Flow**
6. **API Version for Running the Flow**: **51**
7. **Interview Label**: **Survey {!$Flow.CurrentDateTime}**
8. Click **Save**.



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

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

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



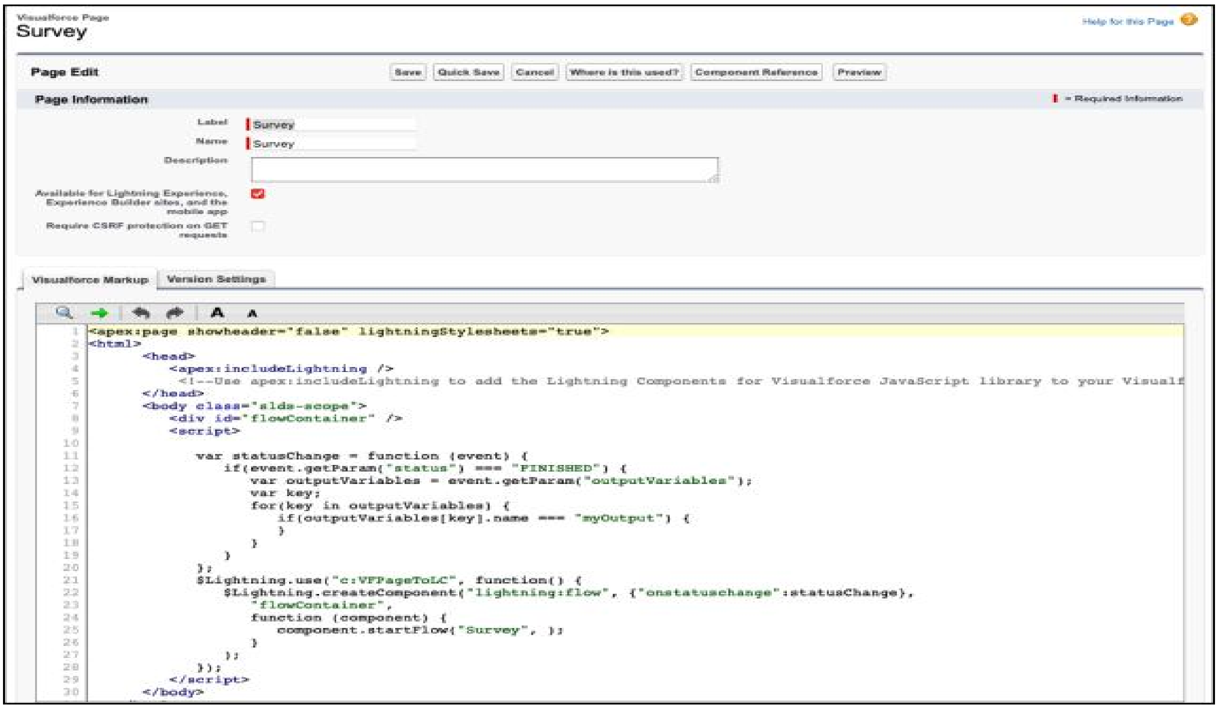
Step 6: Create a Visualforce Page and Embed Your Flow Into It

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

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

component on the page
using **$Lightning.createComponent()**

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

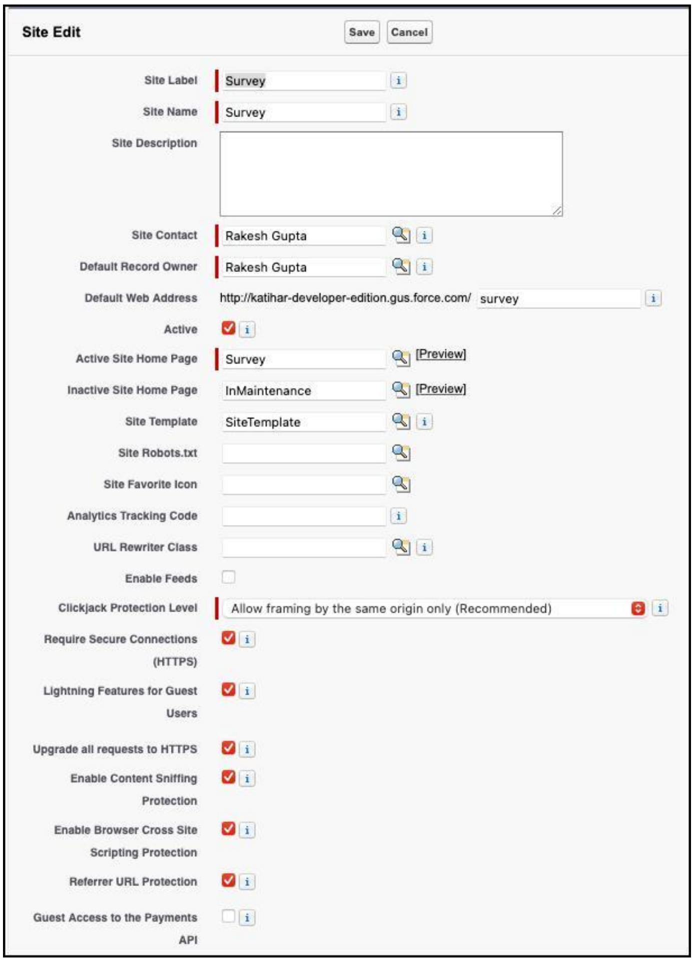


Step 7: Create a Force.com Site to Open Your Flow for Unauthenticated Access

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

1. Click **Setup**.

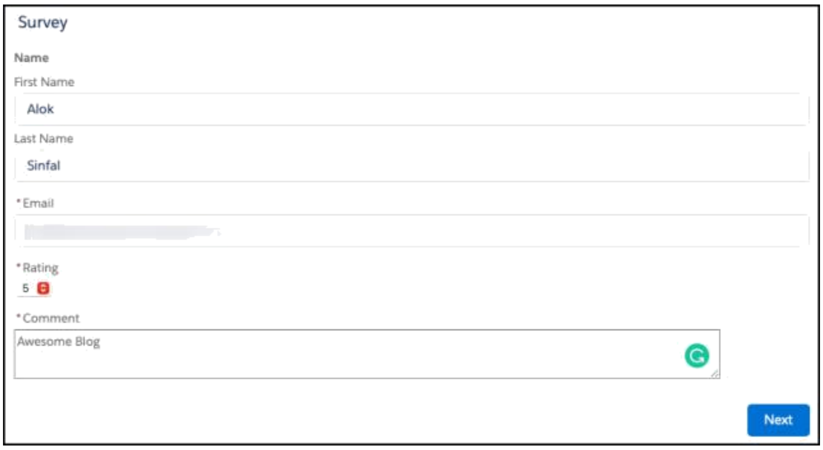
2. In the Quick Find box, type **Sites**.
3. Clicks on the **New** button.
4. Fill the details as per the screenshot below:
5. Click **Save.**



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

Proof of Concept

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



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