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ASSIGNMENT NO 1

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YEAR & DEP : IV YEAR & CSE

BATCH : 2024

ZONE NO : ZONE 8

1. CREATING A MASTER-DETAIL RELATIONSHIP BETWEEN TWO CUSTOM OBJECTS AND SETTING UP A ROLL-UP SUMMARY FIELD TO CALCULATE THE TOTAL NUMBER OF RECORDS IN THE CHILD OBJECT IS A COMMON TASK IN SALESFORCE. BELOW ARE THE STEPS TO ACHIEVE THIS:

STEP 1: CREATE CUSTOM OBJECTS.

The screenshot displays the Salesforce Setup interface, specifically the 'Custom Object Definition Edit' page for a custom object named 'Parent'. The page is divided into a left sidebar with navigation options and a main content area for editing the object's details.

Navigation Sidebar:

- 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

Custom Object Definition Edit Page:

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports. Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label: Example: Account

Plural Label: Example: Accounts

Starts with vowel sound: ☐

The Object Name is used when referencing the object via the API.

Object Name: Example: Account

Description:

Context-Sensitive Help Setting: ☒ Open the standard Salesforce.com Help & Training window ☐ Open a window using a Visualforce page

Context Name:

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name: Example: Account Name

Data Type:

The screenshot shows the Salesforce Setup interface. At the top, there's a search bar and navigation tabs for Setup, Home, and Object Manager. The 'Object Manager' tab is selected, and the 'Child' object is chosen. The left sidebar lists various configuration options like Fields & Relationships, Page Layouts, and Lightning Record Pages. The main area is titled 'Custom Object Definition Edit' and contains several sections: 'Custom Object Information' with fields for Label ('Child'), Plural Label ('Childs'), and Object Name ('Child'); 'Enter Record Name Label and Format' with a Record Name ('Child Name') and Data Type ('Text').

STEP 2: CREATE A MASTER-DETAIL RELATIONSHIP

- 1. GO TO "SETUP" IN SALESFORCE.**
- 2. IN THE QUICK FIND BOX, TYPE "OBJECTS" AND SELECT "OBJECTS AND FIELDS" > "OBJECTS".**
- 3. CLICK ON "PARENT" TO EDIT IT.**
- 4. IN THE "CUSTOM FIELDS & RELATIONSHIPS" SECTION, CLICK "NEW" UNDER "RELATED TO".**
- 5. CHOOSE "MASTER-DETAIL RELATIONSHIP" AS THE DATA TYPE.**
- 6. IN THE "RELATED TO" FIELD, SELECT "CHILD".**
- 7. CONFIGURE OTHER OPTIONS AS NEEDED (E.G., SETTING THE RELATIONSHIP NAME AND WHETHER IT'S REQUIRED).**
- 8. SAVE THE CHANGES.**

Setup

Home

Object Manager

Search Setup

Parent

Setup > OBJECT MANAGER

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

Parent

New Relationship

Help for this Page

Step 2. Choose the related object

Step 2 of 6

Previous

Next

Cancel

Select the other object to which this object is related.

Related To

Child

Previous

Next

Cancel

Setup

Home

Object Manager

Search Setup

Child

Setup > OBJECT MANAGER

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

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Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

Fields & Relationships

5 Items, Sorted by Field Label

Quick Find

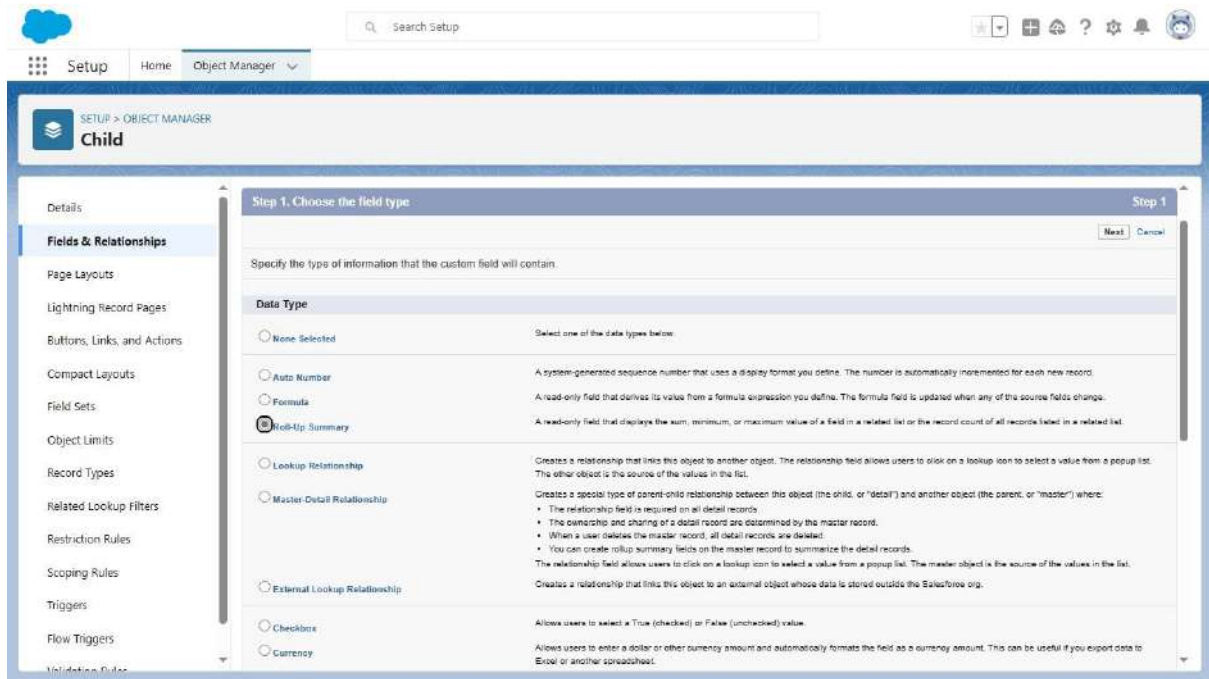
New

Deleted Fields

Field Dependencies

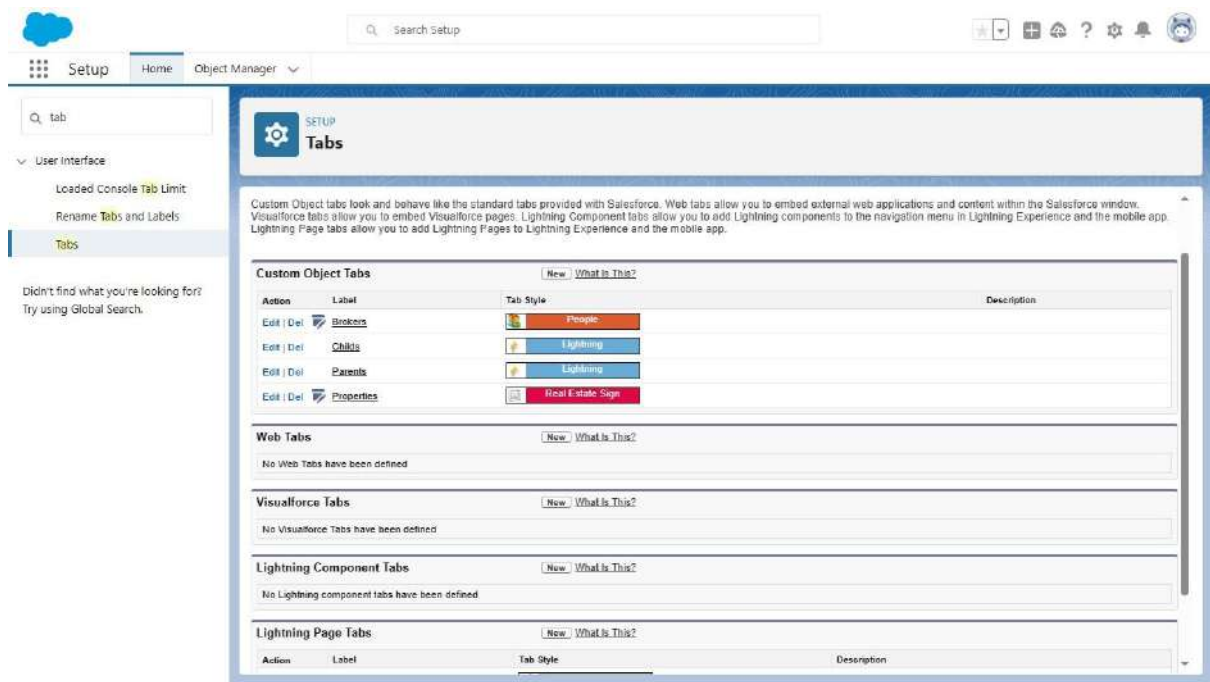
Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Child Name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User/Group)		✓
total child count	total_child_count__c	Roll-Up Summary (COUNT Parent)		



STEP 3: CREATE A ROLL-UP SUMMARY FIELD

1. IN THE SAME "PARENT" EDITING PAGE, SCROLL DOWN TO THE "ROLL-UP SUMMARY FIELDS" SECTION.
2. CLICK "NEW ROLL-UP SUMMARY FIELD."
3. CHOOSE THE "CHILD" AS THE CHILD OBJECT FOR WHICH YOU WANT TO CALCULATE THE TOTAL.
4. GIVE YOUR ROLL-UP SUMMARY FIELD A NAME (E.G., "TOTAL_CHILD_RECORDS__C").
5. CHOOSE THE TYPE OF CALCULATION YOU WANT (E.G., "COUNT").
6. CONFIGURE ANY ADDITIONAL FILTER CRITERIA IF NEEDED.
7. SAVE THE CHANGES.



STEP 4: UPDATE PAGE LAYOUTS AND RECORD TYPES (IF NECESSARY)

DEPENDING ON YOUR USE CASE, YOU MAY WANT TO UPDATE PAGE LAYOUTS AND RECORD TYPES TO MAKE SURE THE NEW RELATIONSHIP AND FIELDS ARE DISPLAYED CORRECTLY TO YOUR USERS.

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app

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Mass Transfer Approval Requests

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App Manager

AppExchange Marketplace

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Connected Apps OAuth Usage

Manage Connected Apps

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Salesforce Branding

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SETUP Lightning Experience App Manager

New Lightning App New Connected App

22 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type

	App Name ↑	Developer Name	Description	Last Modified ...	Ap...	Vi...
1	All Tabs	AllTabSet		22/08/2023, 11:15 am	Classic	✓
2	Analytics Studio	Insights	Build CRM Analytics dashboards and apps	22/08/2023, 11:15 am	Classic	✓
3	App Launcher	AppLauncher	App Launcher tabs	22/08/2023, 11:15 am	Classic	✓
4	Bolt Solutions	LightningBolt	Discover and manage business solutions designed for you...	22/08/2023, 11:17 am	Lightning	✓
5	Community	Community	Salesforce CRM Communities	22/08/2023, 11:15 am	Classic	✓
6	Content	Content	Salesforce CRM Content	22/08/2023, 11:15 am	Classic	✓
7	Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and man...	22/08/2023, 11:15 am	Lightning	✓
8	Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	22/08/2023, 11:15 am	Lightning	✓
9	Dreamhouse	Dreamhouse		29/08/2023, 4:12 pm	Lightning	✓
10	Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	22/08/2023, 11:15 am	Lightning	✓
11	Marketing	Marketing	Best-in-class on-demand marketing automation	22/08/2023, 11:15 am	Classic	✓
12	Platform	Platform	The fundamental Lightning Platform	22/08/2023, 11:15 am	Classic	✓
13	Queue Management	QueueManagement	Create and manage queues for your business.	22/08/2023, 11:15 am	Lightning	✓
14	Sales	Sales	The world's most popular sales force automation (SFA) sol...	22/08/2023, 11:15 am	Classic	✓
15	Sales	LightningSales	Manage your sales process with accounts, leads, opportun...	22/08/2023, 11:15 am	Lightning	✓

Search Setup

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New Lightning App

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

*App Name ⓘ

Parent Details

*Developer Name ⓘ

Chandru

Description ⓘ

Enter a description...

App Branding

Image ⓘ

Upload

Primary Color Hex Value ⓘ

#0070D2

Org Theme Options

☐ Use the app's image and color instead of the org's custom theme

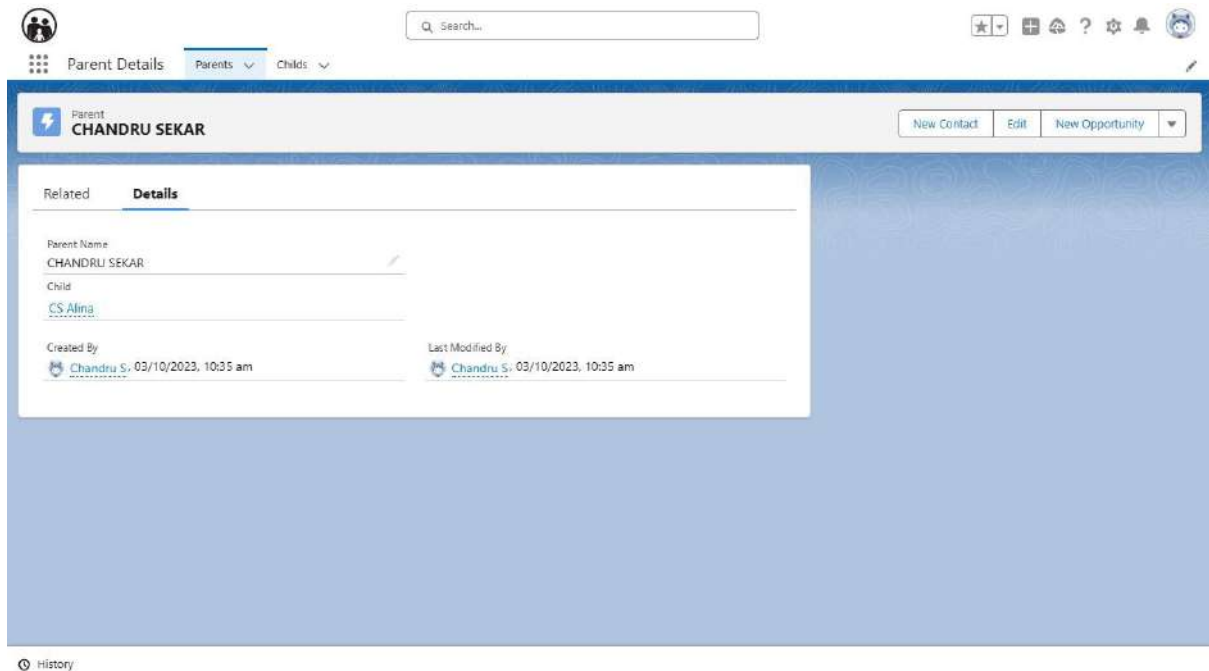
App Launcher Preview

Next

STEP 5: TEST THE RELATIONSHIP AND ROLL-UP SUMMARY FIELD

CREATE SOME RECORDS IN BOTH THE PARENT AND CHILD OBJECTS AND VERIFY THAT THE ROLL-UP SUMMARY FIELD CORRECTLY CALCULATES THE TOTAL NUMBER OF RELATED CHILD RECORDS ON THE PARENT RECORD.

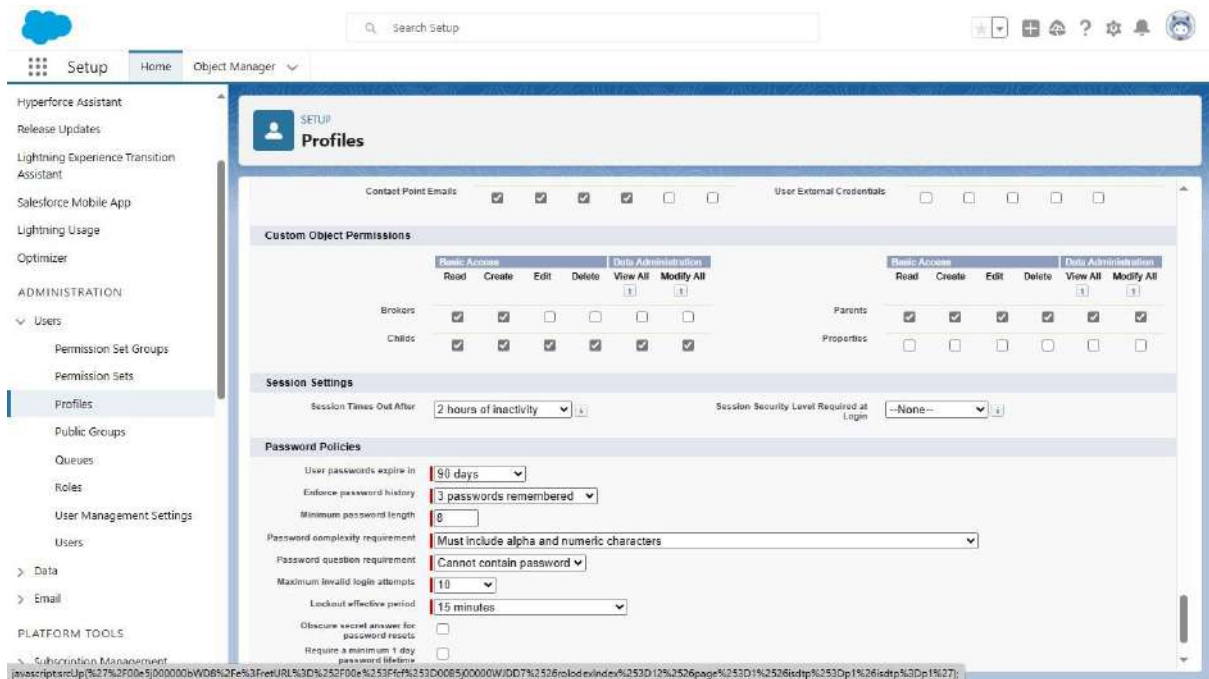
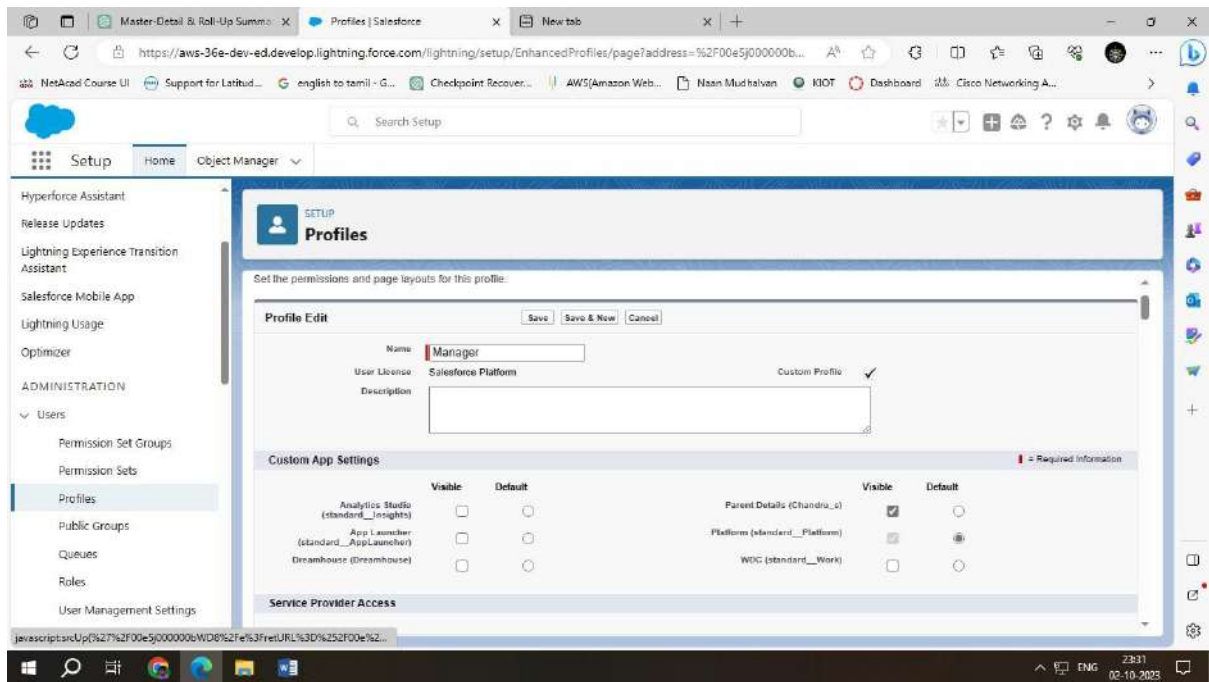
THAT'S IT! YOU'VE SUCCESSFULLY CREATED A MASTER-DETAIL RELATIONSHIP BETWEEN TWO CUSTOM OBJECTS (PARENT AND CHILD) AND SET UP A ROLL-UP SUMMARY FIELD TO CALCULATE THE TOTAL NUMBER OF RECORDS IN THE CHILD OBJECT.



2. IF THERE IS 2 USER, USER A AND USER B IN THE ORGANISATION AND WE WANT IN ACCOUNT OBJECT THAT USER A SHOULD NOT SEE THE USER B RECORD AND USER B SHOULD NOT SEE USER A RECORD THEN APPLY THE SECURITY FOR THE USERS.

STEP 1: CREATE A PUBLIC GROUP

- 1. GO TO "SETUP" IN SALESFORCE.**
- 2. IN THE QUICK FIND BOX, TYPE "PUBLIC GROUPS" AND SELECT IT.**
- 3. CLICK ON "NEW PUBLIC GROUP."**
- 4. CREATE A GROUP FOR USER A, LET'S CALL IT "USERA_GROUP," AND ADD USER A TO THIS GROUP.**
- 5. CREATE ANOTHER GROUP FOR USER B, LET'S CALL IT "USERB_GROUP," AND ADD USER B TO THIS GROUP.**



STEP 2: CREATE CRITERIA-BASED SHARING RULES

FOR USER A:1. GO TO "SETUP" IN SALESFORCE.

2. IN THE QUICK FIND BOX, TYPE "SHARING RULES" AND SELECT "SHARING SETTINGS."

3. UNDER "ACCOUNT SHARING RULES," CLICK ON "NEW SHARING RULE."

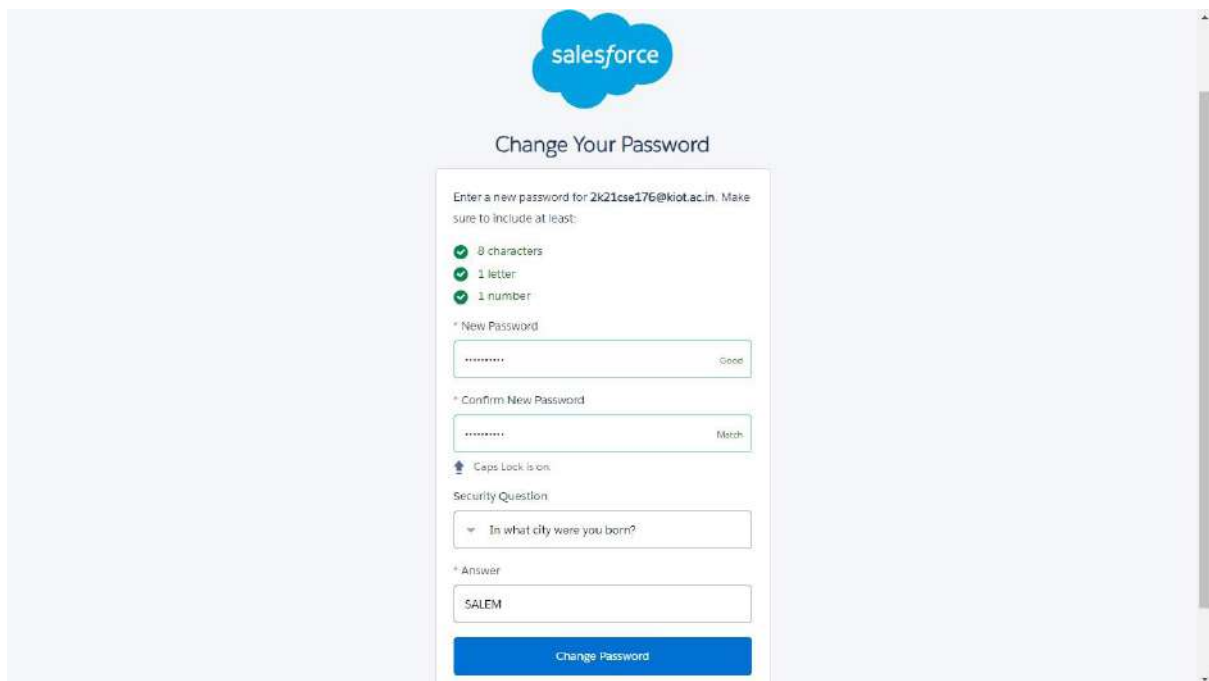
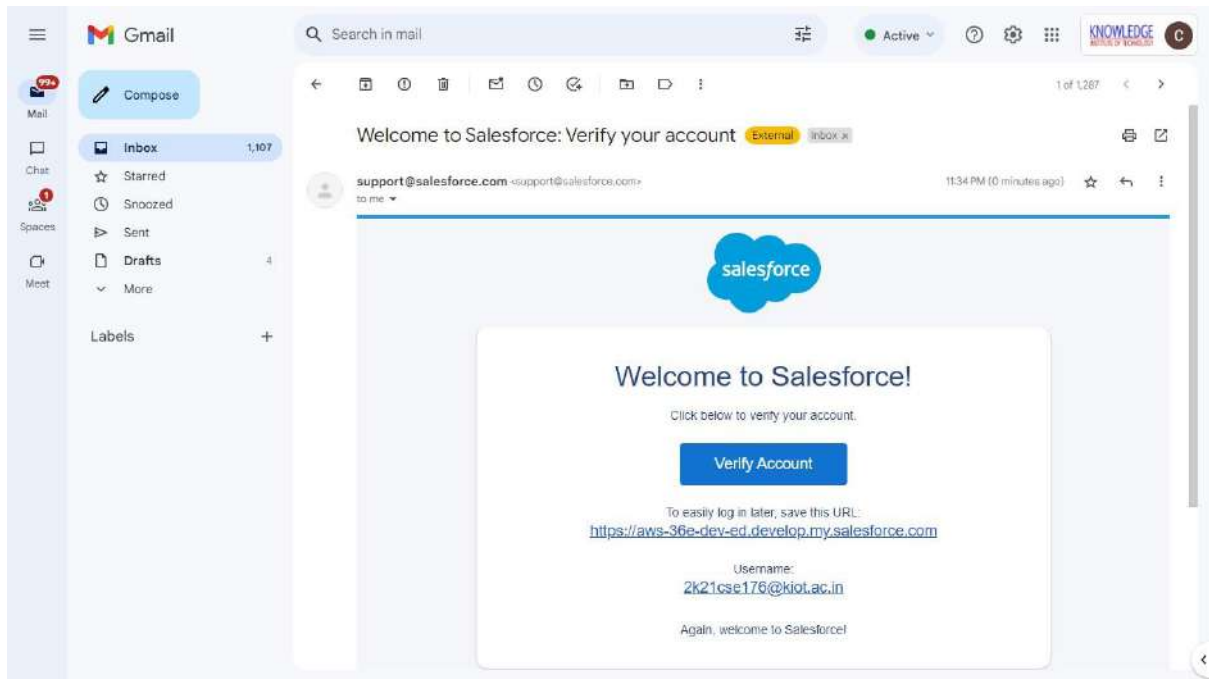
4. CREATE A RULE THAT SHARES RECORDS OWNED BY MEMBERS OF "USERB_GROUP" WITH THE "USERA_GROUP."

5. DEFINE THE CRITERIA BASED ON WHICH RECORDS SHOULD BE SHARED (E.G., OWNERSHIP).

6. SAVE THE SHARING RULE.

The screenshot shows the Salesforce Setup interface. The left sidebar contains navigation links: 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), and PLATFORM TOOLS (Data, Email, Subscription Management). The main content area is titled 'New User' and contains a 'User Edit' form. The form is divided into 'General Information' and 'User License' sections. The 'General Information' section includes fields for First Name (Sunil), Last Name (A), Alias (sa), Email (2k20cse176@klot.ac.in), Username (2k21cse176@klot.ac.in), Nickname (User169631476170576A930), Title, Company (Male), Department, and Division. The 'User License' section includes a Role dropdown (None Specified), User License dropdown (Salesforce Platform), Profile dropdown (Manager), and checkboxes for Active, Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, and WDC User. There are also fields for Data.com User Type, Data.com Monthly Addition Limit, Accessibility Mode (Classic Only), High-Contrast Palette on Charts, and Load Lightning Pages While.

The screenshot shows the Salesforce Setup interface for viewing user details. The left sidebar is the same as the previous screenshot. The main content area is titled 'User: Sunil A' and contains a 'User Detail' form. The form is divided into 'User Detail' and 'User License' sections. The 'User Detail' section includes fields for Name (Sunil A), Alias (sa), Email (2k20cse176@klot.ac.in), Username (2k21cse176@klot.ac.in), Nickname (User169631476170576A930), Title, Company (Male), Department, Division, Address (2/73 Kolankonda (p.o) Malasamudram 637503 Tamil Nadu India), Time Zone (GMT+05:30 India Standard Time (Asia/Kolkata)), Locale (English (India)), Language (English), Delegated Approver (Manager), and Receive Approval Request Emails (Only if I am an approver). The 'User License' section includes fields for Role (Salesforce Platform), User License (Salesforce Platform), Profile (Manager), Active checkbox, Marketing User checkbox, Offline User checkbox, Knowledge User checkbox, Flow User checkbox, Service Cloud User checkbox, Site.com Contributor User checkbox, Site.com Publisher User checkbox, WDC User checkbox, Mobile Push Registrations (View), Data.com User Type, Accessibility Mode (Classic Only), Debug Mode, and High-Contrast Palette on Charts.



Setup Profiles

Profile Edit: **Bmanager**

Set the permissions and page layouts for this profile.

Profile Edit [Save] [Save & Now] [Cancel]

Name: **Bmanager**

User License: **Salesforce Platform**

Description: [Text Area]

Custom Profile: ☒

Custom App Settings [Required Information]

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

Service Provider Access

Tab Settings

☐ Overwrite users' personal tab customizations

Standard Tab Settings: Home Default On Learning **Default On**

Setup Profiles

Custom Object Permissions

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

Session Settings

Session Times Out After: **2 hours of inactivity**

Session Security Level Required at Login: **-None-**

Password Policies

User passwords expire in: **90 days**

Enforce password history: **3 passwords remembered**

Minimum password length: **8**

Password complexity requirement: **Must include alpha and numeric characters**

Password question requirement: **Cannot contain password**

Maximum invalid login attempts: **10**

FOR USER B:

1. FOLLOW THE SAME STEPS AS ABOVE BUT CREATE A SEPARATE SHARING RULE FOR USER B.

2. THIS RULE SHOULD SHARE RECORDS OWNED BY MEMBERS OF "USERA_GROUP" WITH THE "USERB_GROUP."

3. DEFINE THE CRITERIA BASED ON WHICH RECORDS SHOULD BE SHARED.

4. SAVE THE SHARING RULE.

The screenshot shows the Salesforce Setup interface. The left sidebar contains navigation links: 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, Public Groups, Queues, Roles, User Management Settings), Data, Email, PLATFORM TOOLS, and Subscription Management. The main content area is titled 'New User' and contains a 'User Edit' form. The form has two columns. The left column, 'General Information', includes fields for First Name (Sanjay), Last Name (P), Alias (sp), Email (2k20cse171@klot.ac.in), Username (2k20cse171@klot.ac.in), Nickname (User1696315620912300622), Title, Company, Department, and Division. The right column includes fields for Role (<None Specified>), User License (Salesforce Platform), Profile (Bmanager), Active (checked), Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Salesforce Contributor User, Salesforce 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, and Load Lightning Pages While. A 'Required Information' indicator is present at the top right of the form.

STEP 3: ASSIGN RECORDS OWNERSHIP

The screenshot shows the Salesforce Setup interface. The left sidebar is the same as the previous screenshot. The main content area is titled 'Permission Sets' and contains a 'Create' form. The form has a 'Save' button and a 'Cancel' button. The first section, 'Enter permission set information', includes fields for Label (permission), API Name (permission), and Description. Below these fields is a checkbox for 'Section Activation Required'. The second section, 'Select the type of users who will use this permission set', includes a dropdown for 'Who will use this permission set?' with options: '-None-', 'All Users', 'Selected Users', and 'Selected Users and All Users'. Below this dropdown is a text box for 'License' with the value '-None-'. A 'Save' button and a 'Cancel' button are at the bottom of the form.

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SETUP

Permission Sets

Video Tutorial | Help for this Page

permission

Find Settings... Clone Delete Edit Properties Manage Assignments

Permission Set Overview Object Settings

Object Settings

Object Name	Object Permissions	Total Fields	Tab Settings
Account	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 Invites	--	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	--

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permission

Find Settings... Clone Delete Edit Properties Manage Assignments

Permission Set Overview Object Settings Childs

Childs

Save Cancel

Tab Settings

Available	Visible
<input type="checkbox"/>	<input type="checkbox"/>

Object Permissions

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

Field Permissions

Field Name	Read Access	Edit Access
Child Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Created By	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Setup Home Object Manager

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Subscription Management
aws-36e-dev-ed.develop.lightning.force.com/lightning/r/00055/000009Zv6q4AC/vi...

permission

Select Users to Assign

All Users

1 item selected

Search this list...

	Full Name	Alt...	Username	R...	A...	Profile
<input type="checkbox"/>	Chandru S	CS	au611220104303@naanmudhalvan.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Chatter Expert	Chatter	chatty00d5j00000cismqean.ecdfzlkibsr@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	Integration User	integ	integration@00d5j00000cismqean.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	Sanjay P	sp	2k22cse171@kiotac.in		<input checked="" type="checkbox"/>	Manager
<input type="checkbox"/>	Security User	sec	insightssecurity@00d5j00000cismqean.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User
<input checked="" type="checkbox"/>	Sunil A	sa	2k21cse176@kiotac.in		<input checked="" type="checkbox"/>	Manager

Cancel Next

Setup Home Object Manager

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Subscription Management

permission

Select an Expiration Option For Assigned Users

☒ No expiration date

☐ Specify the expiration date.

1 Day 1 Week 30 Days 90 Days Custom Date

Time Zone
Select a time zone...

Selected Users

Full Name	Role	Profile	Active	User License	Expires On
Sunil A		Manager	<input checked="" type="checkbox"/>	Salesforce Platform	Never Expires

Cancel Back Assign

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1 assignments were successful.

permission

Assignment Summary

Full Name	User License	Expires On	Time Zone	Status
Sunil A.	Salesforce Platform			Success

Done

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Find Settings... Clone Edit Properties Manage Assignments

Permission Set Overview > Object Settings > Parents

Parents Save Cancel

Tab Settings

Available	Visible
<input type="checkbox"/>	<input type="checkbox"/>

Object Permissions

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

Field Permissions

Field Name	Read Access	Edit Access
Child	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Created By	<input checked="" type="checkbox"/>	<input type="checkbox"/>

https://sfs-36e-dev-ed.develop.my.salesforce.com/one/app#/alohaRedirect?OP55j000007Uvo1/e?su=EntityPermissions&os=0115j000002r5H&sidtp=p1

Setup Home Object Manager

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permission

> PERMISSION SET 'PERMISSION' > MANAGE ASSIGNMENT EXPIRATION

Select Users to Assign

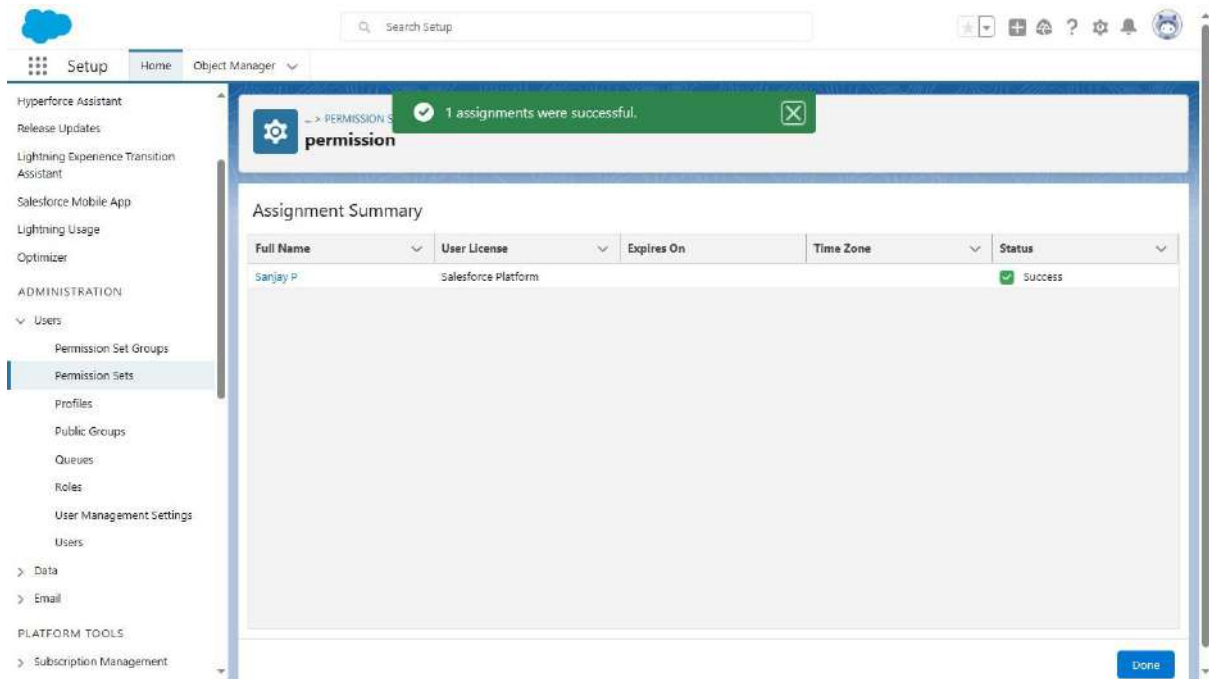
All Users

1 item selected

Search this list...

	Full Name	All...	Username	Role	Ac...	Profile
<input type="checkbox"/>	Chandru S	CS	au611220104303@naanmudhalvan.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Chatter Expert	Chatter	chatty.00dsj000000cismqean.eodfakibsrff@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	Integration User	integ	integration@00dsj000000cismqean.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input checked="" type="checkbox"/>	Sanjay P	sp	2k22cse171@kicrlac.in		<input checked="" type="checkbox"/>	Bmanager
<input type="checkbox"/>	Security User	sec	insightssecurity@00dsj000000cismqean.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

Cancel Next



3. SUPPOSE THERE ARE 2 USERS AND THEY ARE HAVING CREATE, READ, EDIT ACCESS ON ACCOUNT OBJECT WITH THE SAME PROFILE BUT WE WANT TO OPEN UP THE ACCESS FOR ONE USER TO DELETE HOW WILL YOU IMPLEMENT THE SECURITY SETTING.

STEP 1: CREATE A PERMISSION SET FOR DELETE ACCESS

1. GO TO "SETUP" IN SALESFORCE.

2. IN THE QUICK FIND BOX, TYPE "PERMISSION SETS" AND SELECT IT.

3. CLICK "NEW PERMISSION SET" TO CREATE A NEW ONE.

4. GIVE THE PERMISSION SET A NAME (E.G., "DELETE ACCESS PERMISSION SET").

5. IN THE "SYSTEM PERMISSIONS" SECTION, FIND AND ENABLE THE "DELETE" PERMISSION FOR THE "ACCOUNT" OBJECT.

6. Save the permission set.

The screenshot shows the Salesforce Setup interface. The left sidebar contains the following navigation items: Lightning Usage, Optimizer, ADMINISTRATION, Users (expanded), Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, Users (highlighted), Data, Email, PLATFORM TOOLS, Subscription Management, Apps, Feature Settings, Slack, MuleSoft, and Einstein. The main content area is titled 'SETUP Users' and 'All Users'. It includes a search bar, a 'View: All Users' dropdown, and a 'Create New User' link. Below this is a table of users with columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The table lists six users: A. Sanil (Manager), Chatter Expert (Chatter Free User), P. Sanjay (Bmanager), S. Chandru (System Administrator), User Integration (Analytics Cloud Integration User), and User Security (Analytics Cloud Security User). The 'Users' link in the left sidebar is highlighted.

The screenshot shows the Salesforce Setup interface. The left sidebar contains the following navigation items: Lightning Usage, Optimizer, ADMINISTRATION, Users, Permission Set Groups, Permission Sets, Profiles (highlighted), Public Groups, Queues, Roles, User Management Settings, Users, Data, Email, PLATFORM TOOLS, Subscription Management, Apps, Feature Settings, Slack, MuleSoft, and Einstein. The main content area is titled 'SETUP Profiles' and 'Profiles'. It includes a search bar, a 'View: All Profiles' dropdown, and a 'Create New Profile' link. Below this is a table of profiles with columns for Action, Profile Name, User License, and Custom. The table lists 16 profiles: Analytics Cloud Integration User, Analytics Cloud Security User, Authenticated Website, Authenticated Website, Bmanager, Chatter External User, Chatter Free User, Chatter Moderator User, Contract Manager, Cross Org Data Proxy User, Custom: Marketing Profile, Custom: Sales Profile, Custom: Support Profile, Customer Community Login User, Customer Community Plus Login User, and Customer Community Plus User. The 'Profiles' link in the left sidebar is highlighted.

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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

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Profiles

Profile: chan

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 Process Status Access (0) | Enabled Custom Permissions (0)

Profile Detail

Name: chan

User License: Salesforce Platform

Description:

Created By: Chandru S. 03/10/2023, 1:50 pm

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 (View Assignment)

Payment: Payment Layout (View Assignment)

Alternative Payment Method: Alternative Payment Method Layout (View Assignment)

Payment Authorization: Payment Authorization Layout (View Assignment)

Appointment Invitation: Appointment Invitation Layout (View Assignment)

Payment Authorization Adjustment: Payment Authorization Adjustment Layout (View Assignment)

Asset: Asset Layout

Payment Gateway: Payment Gateway Layout

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Profiles

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

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: --None--

Password Policies

User passwords expire in: 90 days

Enforce password history: 3 passwords remembered

Minimum password length: 8

Password complexity requirement: Must include alpha and numeric characters

Password question requirement: Cannot contain password

Maximum invalid login attempts: 10

Lockout effective period: 15 minutes

Obscure secret answer for password resets: ☐

Require a minimum 1 day password lifetime: ☐

Don't immediately expire links in forgot password emails: ☐

Save

Save & New

Cancel

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Profile Edit

chan

Set the permissions and page layouts for this profile.

Name: chan

User License: Salesforce Platform

Description:

Custom Profile: ☒

Custom App Settings

	Visible	Default		Visible	Default
Analytics Studio (standard__Insights)	<input type="checkbox"/>	<input type="checkbox"/>	Parent Details (Chandra, c)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
App Launcher (standard__AppLauncher)	<input type="checkbox"/>	<input type="checkbox"/>	Platform (standard__Platform)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Dreamhouse (Dreamhouse)	<input type="checkbox"/>	<input type="checkbox"/>	WDG (standard__Work)	<input type="checkbox"/>	<input type="checkbox"/>

Service Provider Access

Tab Settings

☐ Overwrite users' personal tab customizations

Standard Tab Settings: Home Default On

Learning: Default On

Master-Detail & Roll-Up Summary X Users | Salesforce X New tab X +

https://aws-36e-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/home

NetAcad Course UI Support for Latitud... english to tamil - G... Checkpoint Recover... AWS(Amazon Web... Nsan Mud halvan KIOT Dashboard Cisco Networking A... Python Tutorial

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SETUP Users

All Users

On this page you can create, view, and manage users.
In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

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
<input type="checkbox"/> Edit	A. Sunil	sa	2k23cse176@klot.ac.in		<input checked="" type="checkbox"/>	Manager
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatterly.0bd50000cismean.eodfrkibsr@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	P. Sanjay	SR	2k22cse171@klot.ac.in		<input checked="" type="checkbox"/>	Manager
<input type="checkbox"/> Edit	S. Chandru	CS	au811220104003@nsanmudhalvan.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	User Integration	intef	integration@90d590000cismean.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	ses	insightsecusr@90d590000cismean.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

New User Reset Password(s) Add Multiple Users

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

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SETUP Users

New User

Help for this Page

User Edit

Save Save & New Cancel

General Information

First Name: Sunil
Last Name: A
Alias: sa
Email: 2k20cse176@klot.ac.in
Username: 2k23cse176@klot.ac.in
Nickname: User1696321490000232961
Title:
Company: Malo
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: ☒

Required information

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Users

User: Sunil A

Permission Set Assignments (0) | Permission Set Assignments Activation Required (0) | Permission Set Group Assignments (0) | Permission Set License Assignments (0) | External Groups (0) | Public Group Memberships (0) | Queue Memberships (0) | Tabs (0) | Managers in the Role Hierarchy (0) | Global Areas (0) | Trust Policy Document Links (0) | Installed Mobile Apps (0) | Authentication Settings for External Systems (0) | Login History (0) | User Provisioning Accounts (0)

User Detail

Edit | Sharing | Reset Password | Freeze

Name	Sunil A	Role	
Alias	sa	User License	Salesforce Platform
Email	2k20cse176@knot.ac.in Verify	Profile	chan
Username	2k20cse176@knot.ac.in	Active	<input checked="" type="checkbox"/>
Nickname	User1696321490682329619	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company	Male	Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address	2/73 Kolankonda(p.o) Malasamudram 637503 Tamil Nadu India	Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View
Delegated Approver		Data.com User Type	4
Manager		Accessibility Mode (Classic Only)	7 8
Receive Approval Request Emails	Only if I am an approver	Debug Mode	7 8
Perfession ID		High-Contrast Palette on Charts	7 8

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Users

User Edit: Sunil A

User Edit

Save | Save & New | Cancel

General Information

First Name: Sunil

Last Name: A

Alias: sa

Email: 2k20cse176@knot.ac.in

Username: 2k20cse176@knot.ac.in

Nickname: User169631476178576A938

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: ☐

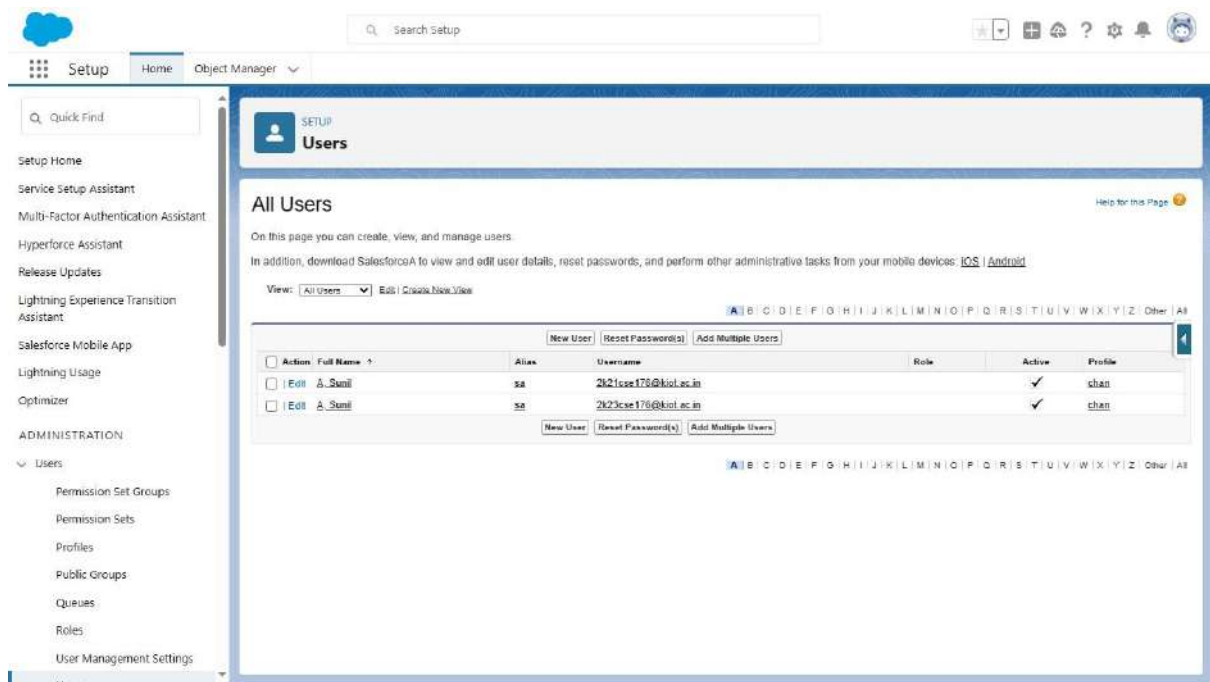
Data.com User Type: --None--

Data.com Monthly Addition Limit: 300

Accessibility Mode (Classic Only): ☐

High-Contrast Palette on Charts: ☐

Low-Lightness Dark Theme: ☐



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.

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Permission Sets

On this page you can create, view, and manage permission sets. In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: [iOS](#) | [Android](#)

[All Permission Sets](#) | [Edit](#) | [Delete](#) | [Create New View](#)

Action	Permission Set Label	Description	License
<input type="checkbox"/> New	Buyer	Allows access to the store. Lets users see products and ca...	B2B Buyer Permission Set One Seat
<input type="checkbox"/> Clone	Buyer Manager	Includes all Buyer capabilities, and allows access to mana...	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/> Clone	CRM User	Denotes that the user is a Sales Cloud or Service Cloud u...	CRM User
<input type="checkbox"/> Clone	Commerce Admin	Allow access to commerce admin features.	Commerce Admin Permission Set License Seat
<input type="checkbox"/> Clone	Contact Center Admin	Manage Service Cloud Voice contact centers that use Ama...	Service Cloud Voice User
<input type="checkbox"/> Clone	Contact Center Agent	Access agent features in Service Cloud Voice contact cent...	Service Cloud Voice User
<input type="checkbox"/> Clone	Contact Center Supervisor	Access supervisor features in Service Cloud Voice contact...	Service Cloud Voice User
<input type="checkbox"/> Edit Clone	Experience Profile Manager		Salesforce
<input type="checkbox"/> Clone	Facility Manager	Lets users create, read, edit, and delete locations, subloc...	Facility Manager
<input type="checkbox"/> Clone	FieldServiceMobileStandardPermSet	Give your mobile workforce access to the Field Service mo...	Field Service Mobile
<input type="checkbox"/> Clone	Merchandiser	Allow access to commerce merchandising features.	Commerce Merchandiser User Permission Set License Seat
<input type="checkbox"/> Clone	Order Management Agent	Read Access to all entities enabled by Order Management	Lightning Order Management User
<input type="checkbox"/> Clone	Order Management Operations Manager	Access to all features enabled by Order Management	Lightning Order Management User
<input type="checkbox"/> Clone	Order Management Supervisor	Limited access to Order Management features for Self Ser...	Lightning Order Management User
<input type="checkbox"/> Clone	Public Management Permission Set		Lightning Public Management User

1-25 of 31 | 0 Selected | Previous Next

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permission01

[Find Settings](#) | [Clone](#) | [Delete](#) | [Edit Properties](#) | [Manage Assignments](#)

Permission Set Overview

Description:
 License:
 Session Activation Required: ☐
 Last Modified By: Chandru S. 03/10/2023, 1:59 pm

API Name: permission01
Namespace Prefix:
Created By: Chandru S. 03/10/2023, 1:59 pm

Edit Properties

Label:
 API Name:
 Description:
 Session Activation Required: ☐
 Save Cancel

Apps

App Permissions
Permissions to perform app-specific actions, such as "Manage Call Centers"

Apex Class Access
Permissions to execute Apex classes

Visualforce Page Access
Permissions to execute Visualforce pages

External Data Source Access
Permissions to authenticate against external data sources

Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform

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Object Permissions

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

Field Permissions

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

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

Field Permissions

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

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2 items selected

Search this list...

	Full Name	Alt...	Username	Role	Ac...	Profile
<input type="checkbox"/>	Chandru S	CS	au611220104303@naanmudhalvan.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Chatter Expert	Chatter	chatty.00d5j00000cismqeanedfzkbsrf@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	Integration User	integ	integration@00d5j00000cismqean.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	Sanjay P	sp	2k22cse171@kilot.ac.in		<input checked="" type="checkbox"/>	Bmanager
<input type="checkbox"/>	Security User	sec	insightssecurity@00d5j00000cismqean.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User
<input checked="" type="checkbox"/>	Sunil A	sa	2k21cse176@kilot.ac.in		<input checked="" type="checkbox"/>	chan
<input checked="" type="checkbox"/>	Sunil A	sa	2k23cse176@kilot.ac.in		<input checked="" type="checkbox"/>	chan

Cancel

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No expiration date

Specify the expiration date

Time Zone

1 Day

1 Week

30 Days

60 Days

Custom Date

Select a time zone...

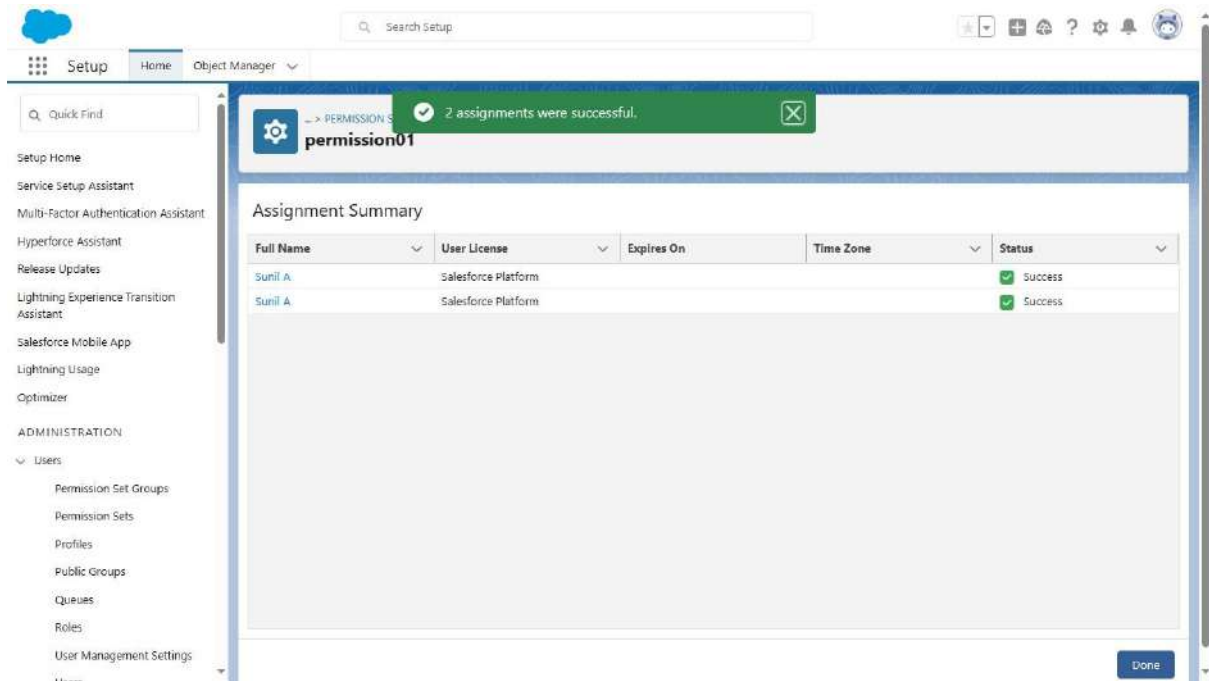
Selected Users

Full Name	Role	Profile	Active	User License	Expires On
Sunil A		chan	<input checked="" type="checkbox"/>	Salesforce Platform	Never Expires
Sunil A		chan	<input checked="" type="checkbox"/>	Salesforce Platform	Never Expires

Cancel

Back

Assign



4.CREATE A SCREEN FLOW FOR A BASIC SURVEY TO FILL IN THE DETAILS FOR ANY FORM.


STEP 1: CREATE A CUSTOM OBJECT

1.CLICK SETUP.

2.IN THE OBJECT MANAGER, CLICK CREATE | CUSTOM OBJECT.

3.NOW CREATE A CUSTOM OBJECT SURVEY RESULT AND FIELDS AS SHOWN IN THE SCREENSHOT BELOW:

4. CLICK SAVE.

<div>  <div> <div>SETUP > OBJECT MANAGER</div> <div>Survey Result</div> </div> </div>					
<div> <div>Details</div> <div>Fields & Relationships</div> <div>Page Layouts</div> <div>Lightning Record Pages</div> <div>Buttons, Links, and Actions</div> <div>Compact Layouts</div> <div>Field Sets</div> <div>Object Limits</div> <div>Record Types</div> <div>Related Lookup Filters</div> <div>Search Layouts</div> <div>Search Layouts for Salesforce Classic</div> <div>Triggers</div> <div>Validation Rules</div> </div>	<div> <div>Fields & Relationships</div> <div> <div>Quick Find</div> <div>New</div> <div>Deleted Fields</div> <div>Field Dependencies</div> <div>Set History Tracking</div> </div> </div>	8 Items, Sorted by			
	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
	Comment	Comment__c	Text Area(255)		
	Created By	CreatedById	Lookup(User)		
	Email	Email__c	Email		
	Last Modified By	LastModifiedById	Lookup(User)		
	Name	Name__c	Text(51)		
	Owner	OwnerId	Lookup(User,Group)		✓
	Rating	Rating__c	Picklist		
	Survey Result Name	Name	Auto Number		✓

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

Email Template

Thank You Email - Survey

[Edit in Builder](#)
[Edit](#)
[Clone](#)

Details
Related

Information

Email Template Name	Thank You Email - Survey	Related Entity Type	Survey Result
Description		Folder	Public Email Templates
Made in Email Template Builder	<input checked="" type="checkbox"/>		

Message Content

Subject	Thank You For Completing Our Survey!	Enhanced Letterhead	
HTML Value	<div> <div></div> <div> Hi {{{Survey_Result__c.Name__c}}}, Thanks for taking time out to participate in our survey. We are very appreciative of the time you have taken to assist in our analysis, and commit to utilizing the information gained to contemplate and implement worthwhile improvements. We will share these results with you through your State Survey Agency, whom we also thank for their generous participation. Once again, we are extremely grateful for your contributing your valuable time, your honest information, and your thoughtful suggestions. Thanks, Automation Champion </div> <div></div> </div>		

Additional Information

Created By	Rakesh Gupta, 12/21/2020, 4:23 PM	Last Modified By	Rakesh Gupta, 12/21/2020, 4:32 PM
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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.

Edit Email Alert Help for this Page ?

Survey - Thank You Email

Create an email alert to associate with one or more workflow rules, approval processes, or entitlement processes. When changing an email alert, any modifications will apply to all rules, approvals, or entitlement processes associated with it.

Email Alert Edit Save Save & New Cancel

Edit Email Alert ! = Required Information

Description ! Survey - Thank You Email

Unique Name ! Survey_Thank_You_Email i

Object Survey Result

Email Template ! Thank You Email - Survey i

Protected Component ☐

Recipient Type ! Search: User ! for: Find

Recipients

Available Recipients

User: Integration User
User: Rakesh Gupta
User: Security User

Selected Recipients

Email Field: Email

Add ➔
Remove ⬅

You can enter up to five (5) email addresses to be notified.

Additional Emails

From Email Address ! Current User's email address !

☐ Make this address the default From email address for this object's email alerts. i

Save Save & New Cancel

STEP 4.1: SALESFORCE FLOW – CREATE A SCREEN THAT ALLOW USERS TO FILL SURVEY

1. CLICK SETUP.
2. IN THE QUICK FIND BOX, TYPE FLOWS.
3. SELECT FLOWS THEN CLICK ON THE NEW FLOW.
4. SELECT THE SCREEN FLOW OPTION AND CLICK ON NEXT AND CONFIGURE THE FLOW AS FOLLOWS:
5. HOW DO YOU WANT TO START BUILDING: FREEFORM
6. WE WILL USE THE SCREEN ELEMENT TO CAPTURE A SURVEY RESPONSE FORM. DRAG AND DROP A SCREEN ELEMENT ONTO THE

CANVAS.

STEP 4.2: SALESFORCE FLOW – ADD A RECORD CREATES ELEMENT TO SAVE SURVEY RESPONSE

1.DRAG-AND-DROP THE CREATE RECORDS ELEMENT ONTO THE FLOW DESIGNER. 2. ENTER A NAME IN THE LABEL (SAVE RESPONSE) FIELD; THE API NAME WILL AUTO-POPULATE.

3.FOR HOW MANY RECORDS TO CREATE – SELECT ONE.

4.FOR HOW TO SET THE RECORD FIELDS – SELECT USE SEPARATE RESOURCES, AND LITERAL VALUES.

5.SELECT THE SURVEY_RESULT__C OBJECT FROM THE DROPDOWN LIST.

6.SET FIELD VALUES FOR THE SURVEY RESULT

ROW 1:

FIELD: COMMENT__C

VALUE: {!COMMENT}

CLICK ADD ROW

ROW 2:

FIELD: EMAIL__C

VALUE: {!EMAIL.VALUE}

CLICK ADD ROW

ROW3:

FIELD: NAME__C

VALUE: {!NAME.FIRSTNAME} {!NAME.LASTNAME}

CLICK ADD ROW

ROW 3:

FIELD: RATING__C

VALUE: {!RATING}

7.CLICK DONE.

Edit Create Records

Create Salesforce records using values from the flow.

* Label
Save Response

* API Name
Save_Response

Description

How Many Records to Create

☒ One
☐ Multiple

How to Set the Record Fields

☐ Use all values from a record
☒ Use separate resources, and literal values

Create a Record of This Object

* Object
Survey Result

Set Field Values for the Survey Result

Field
Value

Comment__c
←
A Comment ×

Field
Value

Email__c
←
A Email > Value ×

Field
Value

Name__c
←
{!Name.firstName} {!Name.lastName}

Field
Value

Rating__c
←
A Rating ×

+ Add Field

☐ Manually assign variables

Cancel
Done

STEP 4.3: SALESFORCE FLOW – CALL AN ACTION – EMAIL ALERT TO SEND OUT THANK YOU EMAIL

- 1.UNDER TOOLBOX, SELECT ELEMENT.
- 2.DRAG-AND-DROP ACTION ELEMENT ONTO THE FLOW DESIGNER.
- 3.IN THE ACTION BOX, TYPE SURVEY – THANK YOU EMAIL.

4.CLICKS ON THE SURVEY – THANK YOU EMAIL EMAIL ALERT.

5.CLICK DONE.

Edit "Survey - Thank You Email" email alert

Use values from earlier in the flow to set the inputs for the "Survey - Thank You Email" email alert. To use its outputs later in the flow, store them in variables.

* Label

Send Thank You Email

* API Name

Send_Thank_You_Email

Description

Set Input Values

A₃

* Record ID

{!Save_Response}

Cancel

Done

Save as

A New Version

A New Flow

* Flow Label

Survey

* Flow API Name

Survey

Description

Hide Advanced

How to Run the Flow ⓘ

User or System Context–Depends on How Flow is Launched ▼

* Type

Screen Flow ▼

* API Version for Running the Flow

51 ▼

Interview Label ⓘ

Insert a resource... 🔍

Survey {!\$Flow.CurrentDateTime}

Last Modified

12/21/2020, 4:54 PM by Rakesh Gupta

Status:

Active

Type:

Screen Flow

Version Number:

2

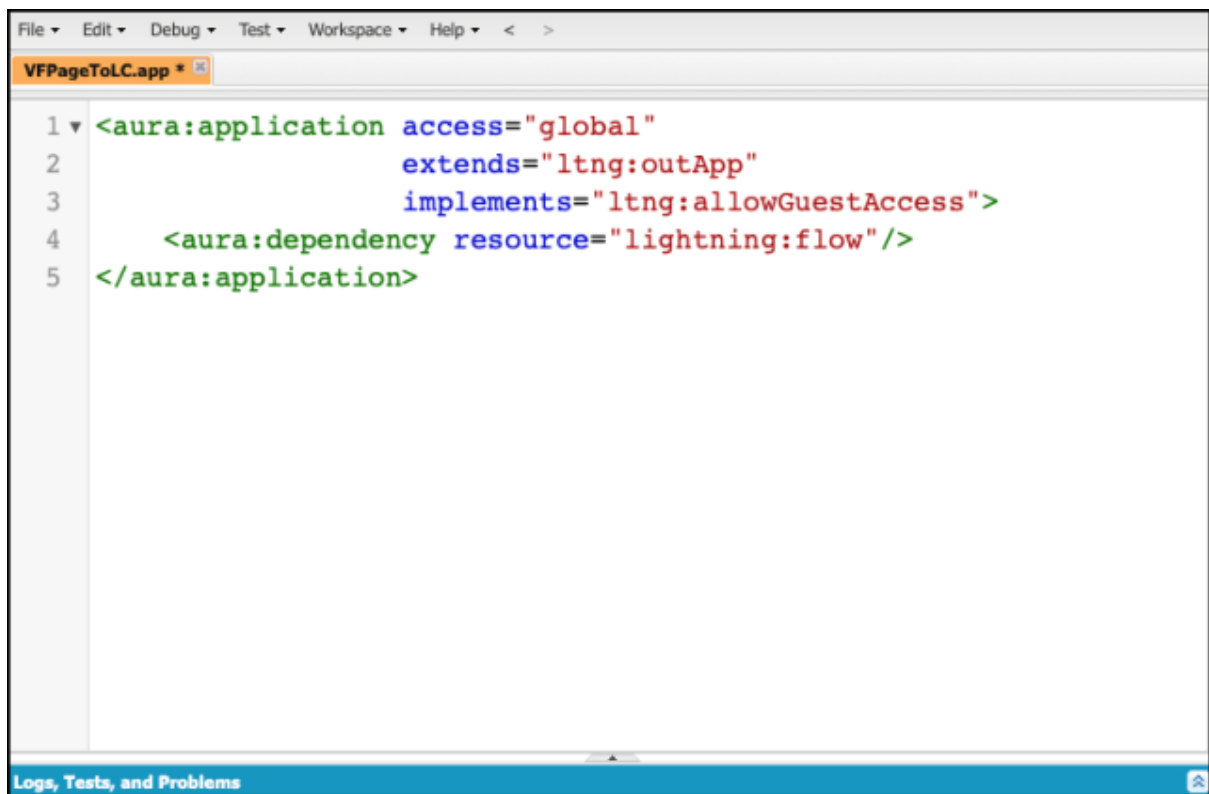
Cancel

Save

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.



Visualforce Page
Survey

Page Edit Save Quick Save Cancel Where is this used? Component Reference Preview

Page Information ! Required Information

Label Survey

Name Survey

Description

Available for Lightning Experience, Experience Builder sites, and the mobile app ☒

Require CSRF protection on GET requests ☐

Visualforce Markup Version Settings

```

1 <apex:page showheader="false" lightningStyleSheets="true">
2 <html>
3   <head>
4     <apex:includeLightning />
5     <!--Use apex:includeLightning to add the Lightning Components for Visualforce JavaScript library to your Visualf
6   </head>
7   <body class="slds-scope">
8     <div id="flowContainer" />
9     <script>
10
11       var statusChange = function (event) {
12         if(event.getParam("status") === "FINISHED") {
13           var outputVariables = event.getParam("outputVariables");
14           var key;
15           for(key in outputVariables) {
16             if(outputVariables[key].name === "myOutput") {
17               }
18             }
19           }
20         };
21       $Lightning.use("c:VFPageToLC", function() {
22         $Lightning.createComponent("lightning:flow", {"onstatuschange":statusChange},
23           "flowContainer",
24           function (component) {
25             component.startFlow("Survey", );
26           }
27         );
28       });
29     </script>
30   </body>

```

STEP 7: CREATE A FORCE.COM SITE TO OPEN YOUR FLOW FOR UNAUTHENTICATED ACCESS

- NOW WE WILL CREATE A SITE TO OPEN THE FLOW FOR UNAUTHENTICATED ACCESS.
- 1.CLICK SETUP.
 - 2.IN THE QUICK FIND BOX, TYPE SITES.
 - 3.CLICKS ON THE NEW BUTTON.
 - 4.FILL THE DETAILS AS PER THE SCREENSHOT BELOW:
 - 5.CLICK SAVE.

Site Edit

Save

Cancel

Site Label

Survey

i

Site Name

Survey

i

Site Description

Site Contact

Rakesh Gupta

i

Default Record Owner

Rakesh Gupta

i

Default Web Address

http://katiyar-developer-edition.gus.force.com/

survey

i

Active

☒

i

Active Site Home Page

Survey

[Preview]

Inactive Site Home Page

InMaintenance

[Preview]

Site Template

SiteTemplate

i

Site Robots.txt

Site Favorite Icon

Analytics Tracking Code

i

URL Rewriter Class

i

Enable Feeds

☐

Clickjack Protection Level

Allow framing by the same origin only (Recommended)

i

Require Secure Connections

☒

i

(HTTPS)

Lightning Features for Guest

☒

i

Users

Upgrade all requests to HTTPS

☒

i

Enable Content Sniffing

☒

i

Protection

Enable Browser Cross Site

☒

i

Scripting Protection

Referrer URL Protection

☒

i

Guest Access to the Payments

☐

i

API

UNDER SITE, PUBLIC ACCESS SETTINGS MAKE SURE THAT GUEST

USERS HAVE CREATE ACCESS ON SURVEY RESULT OBJECT AND EDIT ON THE FIELDS.

PROOF OF CONCEPT

NOW ONWARD, IF SOMEONE OPENS THE SITE URL AND FILLS THE FORM:

Survey

Name

First Name

Last Name

*Email

*Rating

5 

*Comment



Next

AFTER SUCCESSFUL SUBMISSION, HE/SHE WILL RECEIVE AN EMAIL.

ROW 1:

FIELD: COMMENT__C

VALUE: {!COMMENT}

CLICK ADD ROW

ROW 2:

FIELD: EMAIL__C

VALUE: {!EMAIL.VALUE}

CLICK ADD ROW

ROW 3:

FIELD: NAME__C

VALUE: {!NAME.FIRSTNAME} {!NAME.LASTNAME}

CLICK ADD ROW

ROW 3:

FIELD: RATING__C

VALUE: {!RATING}

CLICK DONE.