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Salesforce Developer(Course)
Assignment no 1

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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 and a main content area.

Left 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
- Initiation Rules

Main Content Area (Custom Object Definition Edit):

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

Content 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

Setup > OBJECT MANAGER

Parent

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

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Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

Fields & Relationships

4 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Parent Name	Name	Text(80)		✓

Setup

Home

Object Manager

Search Setup

Setup > OBJECT MANAGER

Parent

Details

Fields & Relationships

Page Layouts

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Buttons, Links, and Actions

Compact Layouts

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Restriction Rules

Scoping Rules

Triggers

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Validation Rules

Parent

New Custom Field

Help for this Page

Step 1: Choose the field type

Next

Cancel

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

Data Type

☐ None Selected

Select one of the data types below.

☐ Auto Number

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

☐ Formula

A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

☐ Roll-Up Summary

A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

☐ Lookup Relationship

Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

☒ Master-Detail Relationship

Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create roll-up summary fields on the master record to summarize the detail records.

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

☐ External Lookup Relationship

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

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Home

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Search Setup

Parent

Setup > OBJECT MANAGER

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

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Scoping Rules

Triggers

Flow Triggers

Validation Rules

Parent

New Relationship

Help for this Page

Step 2. Choose the related object

Step 2 of 6

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

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

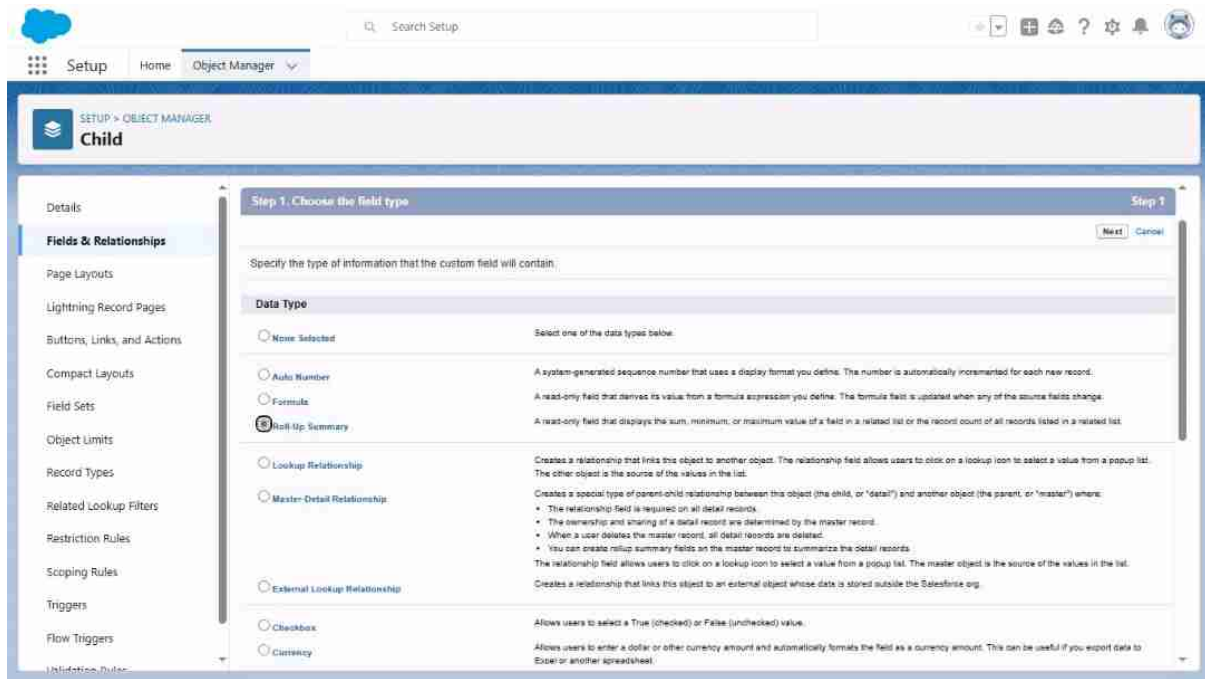
Fields & Relationships

5 Items, Sorted by Field Label

Quick Find

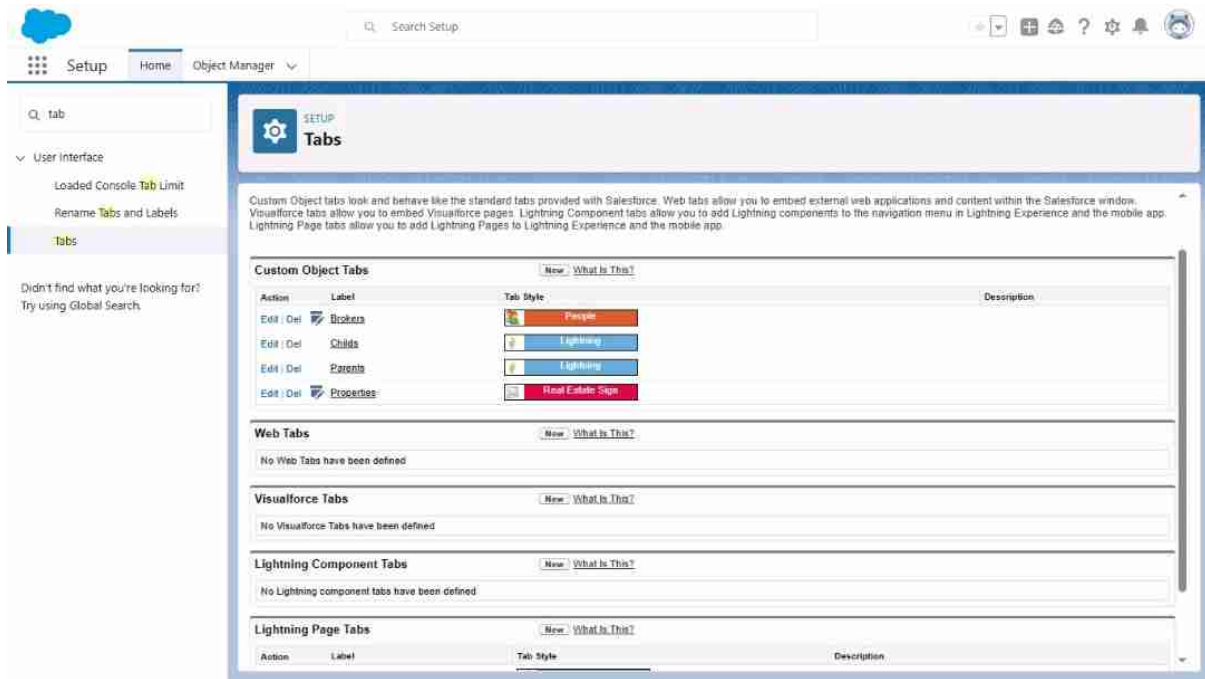
New Deleted Fields Field Dependencies Set History Tracking

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



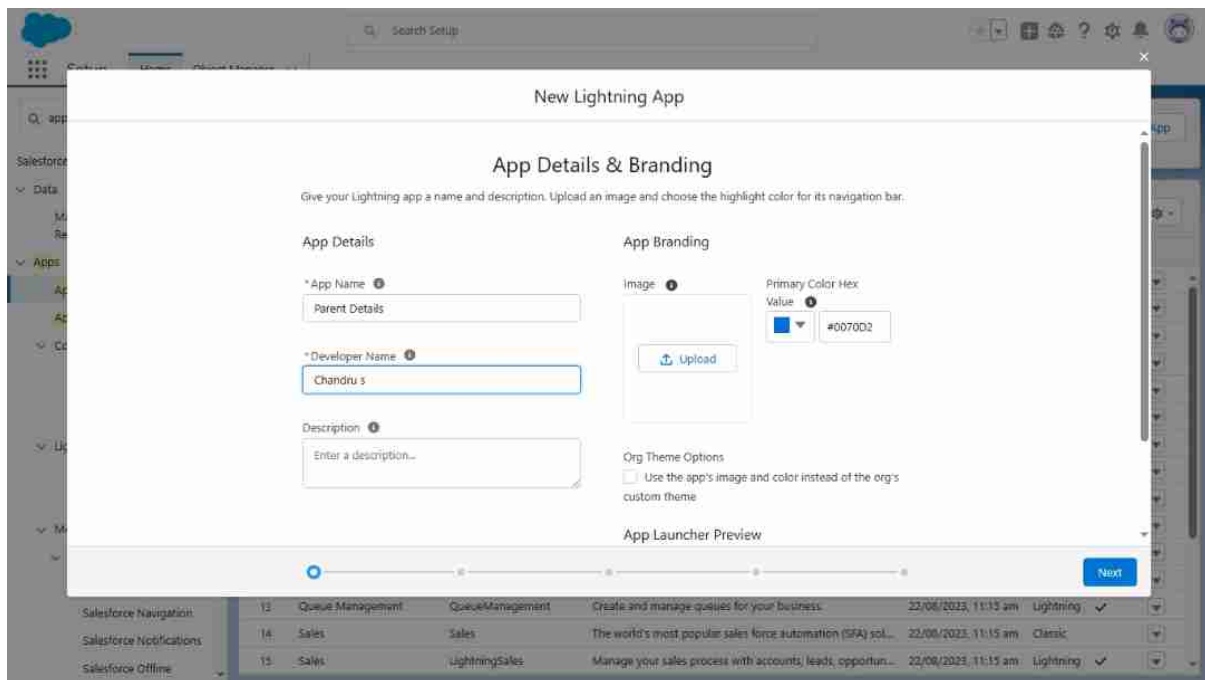
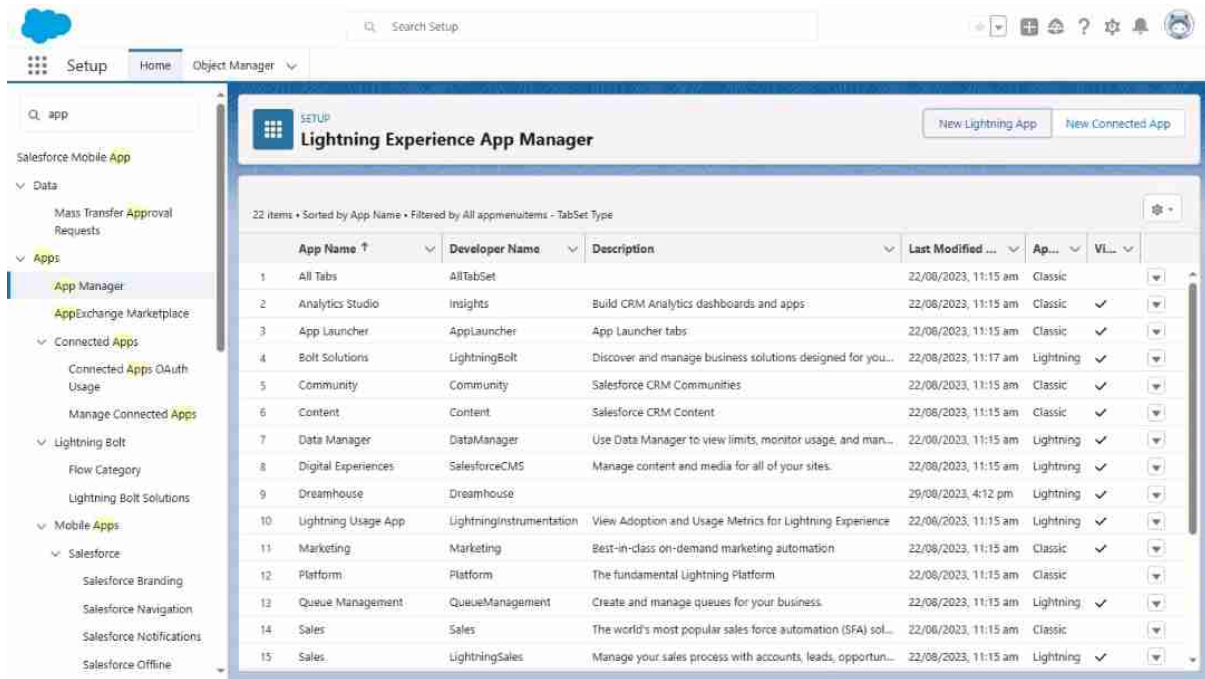
Step 3: Create a Roll-Up Summary Field

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)

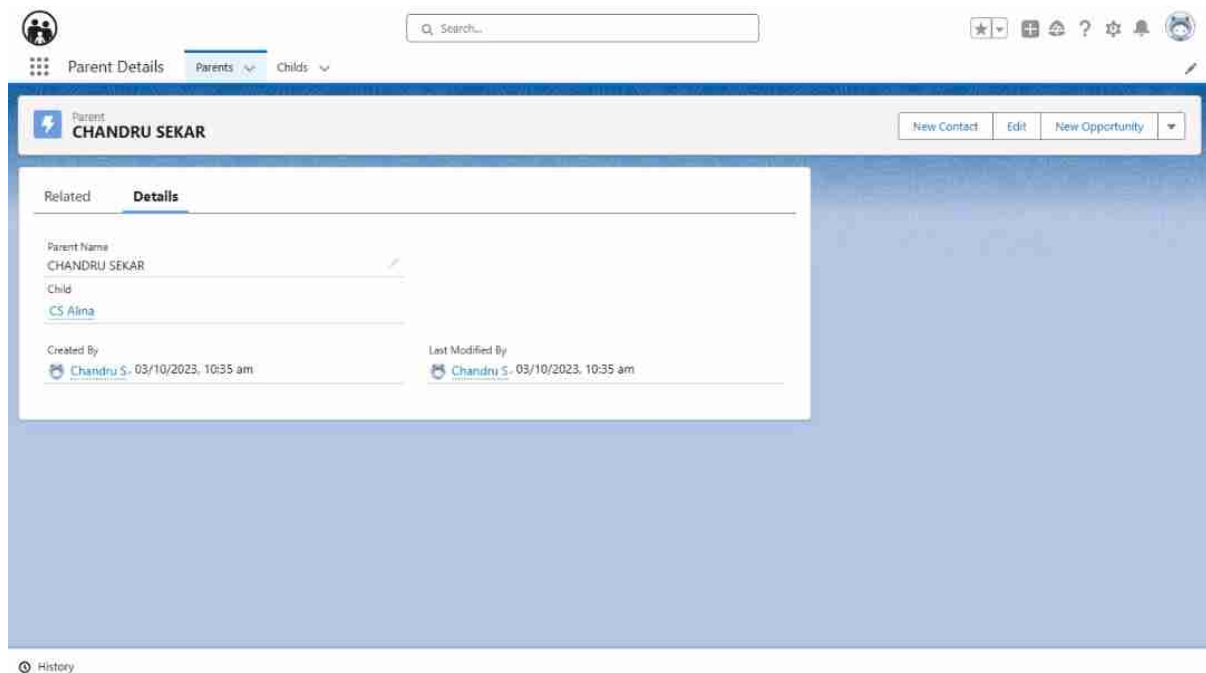
Depending on your use case, you may want to update page layouts and record types to make sure the new relationship and fields are displayed correctly to your users.



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.

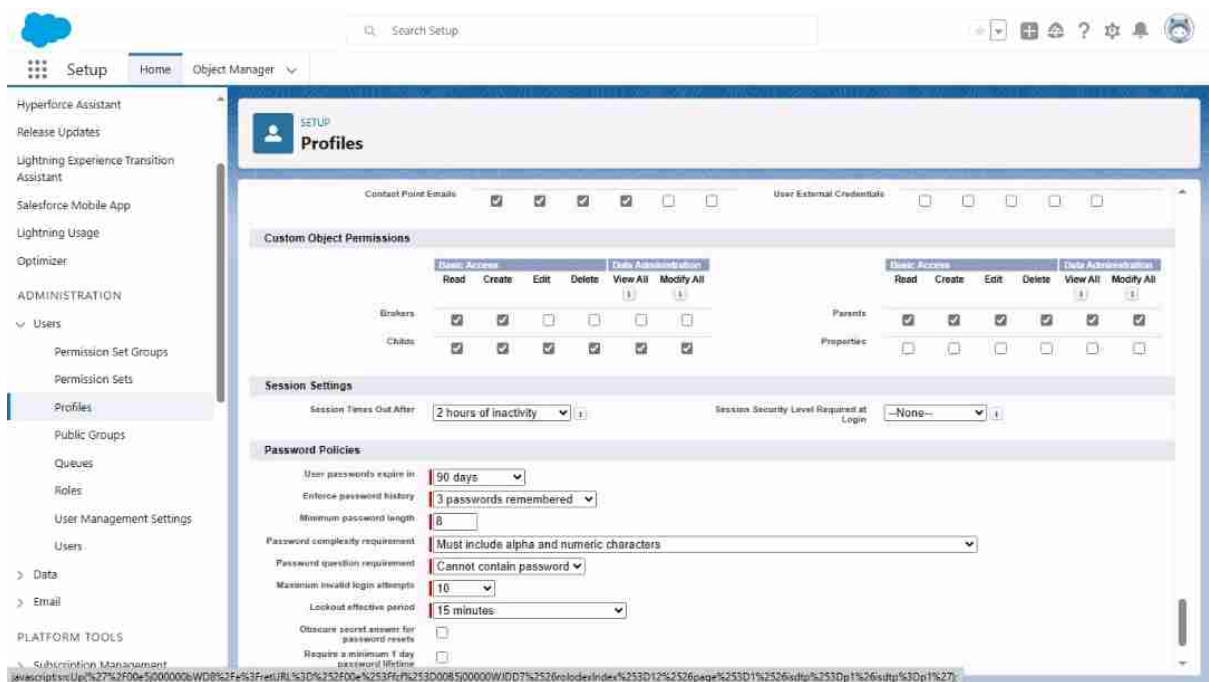
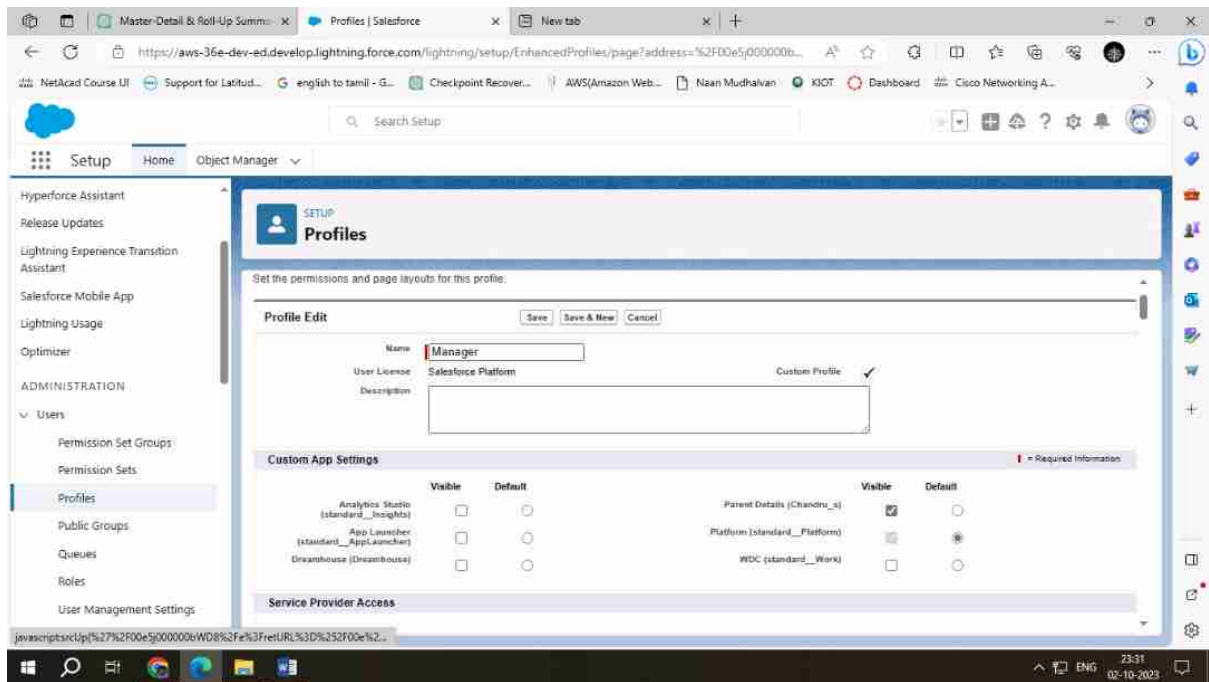
That's it! You've successfully created a Master-Detail relationship between two custom objects (Parent and Child) and set up a Roll-Up Summary Field to calculate the total number of records in the Child object.



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 th 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 displays the Salesforce Setup interface. The left sidebar shows the navigation menu with 'Setup' selected. The main content area is titled 'New User' and contains a 'User Edit' form. The form is divided into two columns. The left column contains fields for 'First Name' (Sunil), 'Last Name' (A), 'Alias' (sa), 'Email' (2k20cse176@kiot.ac.in), 'Username' (2k21cse176@kiot.ac.in), 'Nickname' (User169631476178576A932), 'Title', 'Company', 'Department', and 'Division'. The right column contains fields for 'Role' (<None Specified>), 'User License' (Salesforce Platform), 'Profile' (Manager), 'Active' (checked), 'Marketing User' (unchecked), 'Offline User' (unchecked), 'Knowledge User' (unchecked), 'Flow User' (unchecked), 'Service Cloud User' (unchecked), 'Site.com Contributor User' (unchecked), 'Site.com Publisher User' (unchecked), 'WDC User' (unchecked), 'Data.com User Type' (-None-), 'Data.com Monthly Addition Limit' (Default Limit (300)), 'Accessibility Mode (Classroom Only)' (unchecked), 'High-Contrast Palette on Charts' (unchecked), and 'Load Lightning Pages While' (checked).

The screenshot displays the Salesforce Setup interface for the 'Users' section. The left sidebar contains navigation links for Setup, Home, Object Manager, and various assistants. The main content area shows the 'User Detail' for 'Sunil A'. The user's email is 2k21coe176@knot.ac.in, and the role is 'Salesforce Platform Manager'. The user is active and has various permissions checked.

User Detail		Actions	
Name	Sunil A	Edit	Sharing
Alias	sa	Reset Password	Freeze
Email	2k21coe176@knot.ac.in (Verify)		
Username	2k21coe176@knot.ac.in		
Nickname	User169631475170576A93016		
Title			
Company	Male		
Department			
Division			
Address	2/73 Kotankondalip o) Metturamudram 637503 Tamil Nadu India		
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)		
Locale	English (India)		
Language	English		
Delegated Approver			
Manager			
Receive Approval Request Emails	Only if I am an approver		
Refederation ID			
Role	Salesforce Platform Manager		
User License	Profile		
Active	✓		
Marketing User	<input type="checkbox"/>		
Offline User	<input type="checkbox"/>		
Knowledge User	<input type="checkbox"/>		
Flow User	<input type="checkbox"/>		
Service Cloud User	<input type="checkbox"/>		
Site.com Contributor User	<input type="checkbox"/>		
Site.com Publisher User	<input type="checkbox"/>		
WDC User	<input type="checkbox"/>		
Mobile Push Registrations	View		
Data.com User Type	<input type="checkbox"/>		
Accessibility Mode (Classic Only)	<input type="checkbox"/>		
Debug Mode	<input type="checkbox"/>		
High-Contrast Palette on Charts	<input type="checkbox"/>		



Change Your Password

Enter a new password for 2k21cse176@kilot.ac.in. Make sure to include at least:

✓ 8 characters

✓ 1 letter

✓ 1 number

* New Password

*****Good

* Confirm New Password

*****Match

🔒 Caps Lock is on


Security Question

▼ In what city were you born?

* Answer

SALEM

Change Password



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SETUP

Profiles

Profile Edit

Save Save & New Cancel

Profile Edit

Set the permissions and page layouts for this profile.

NameBmanager

User LicenseSalesforce Platform

Description

Custom Profile✓

Custom App Settings

Required Information

	Visible	Default		Visible	Default
Analytics Studio (standard__Insights)	<input type="checkbox"/>	<input type="radio"/>	Parent Details (Chatter__x)	<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"/>	WOC (standard__Work)	<input type="checkbox"/>	<input type="radio"/>

Service Provider Access

Tab Settings

☐ Overwrite users' personal tab customizations

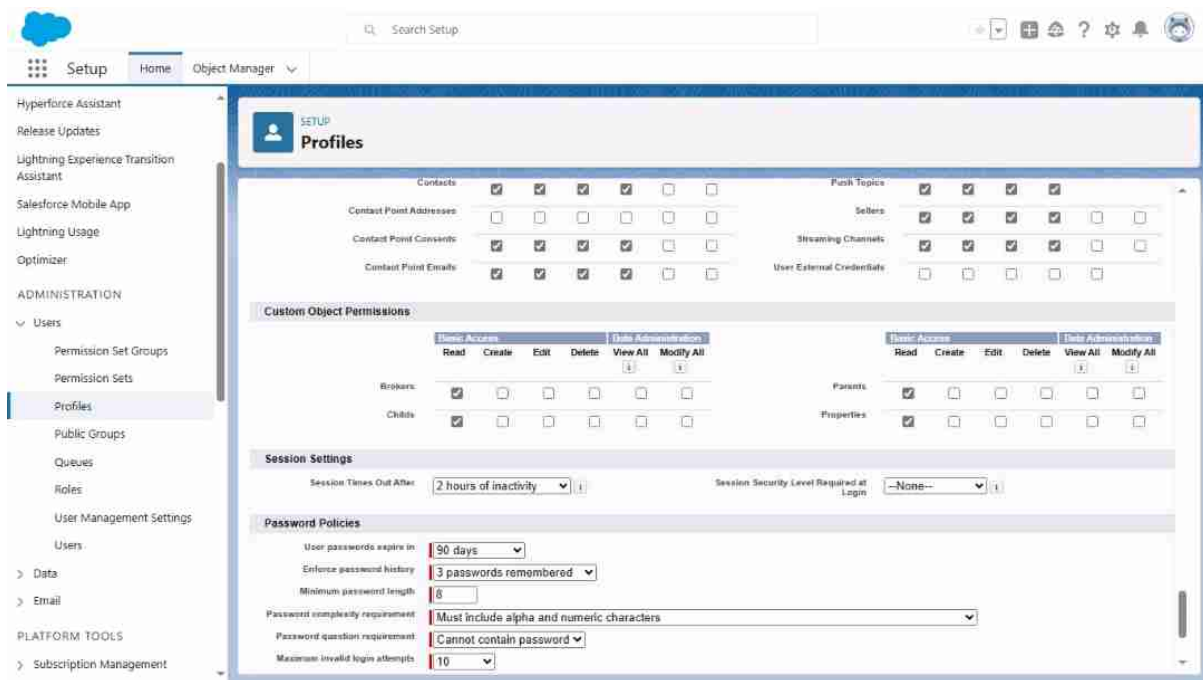
Standard Tab Settings

Home

Default On

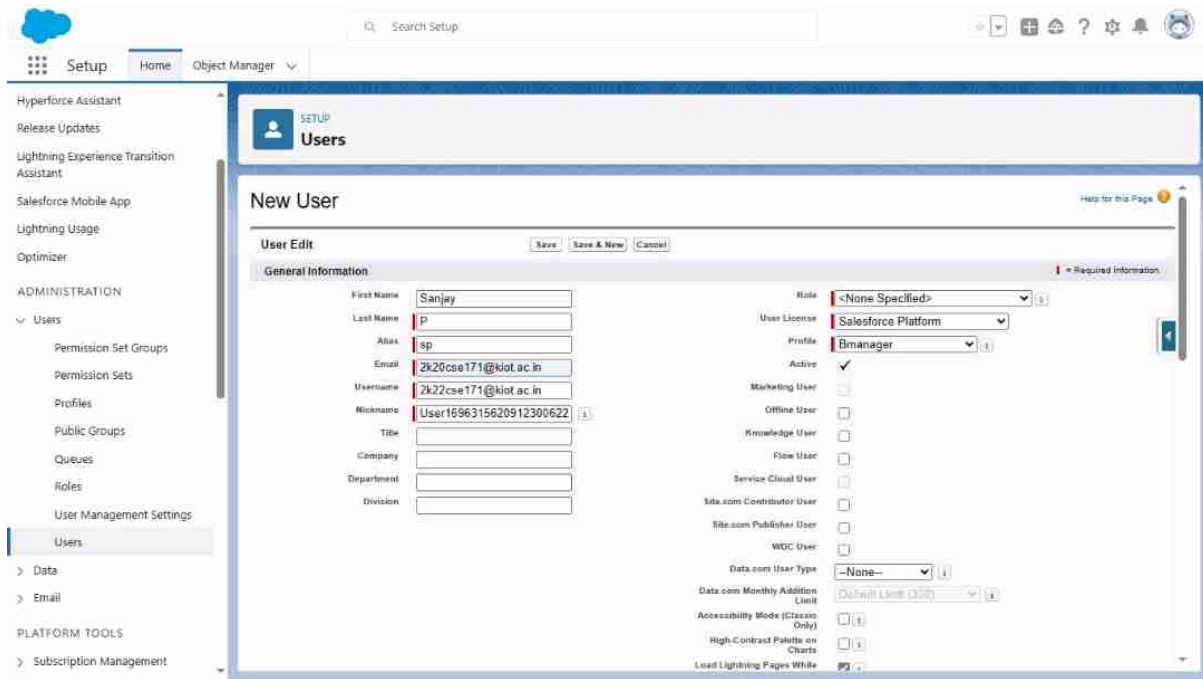
Learning

Default On



For User B:

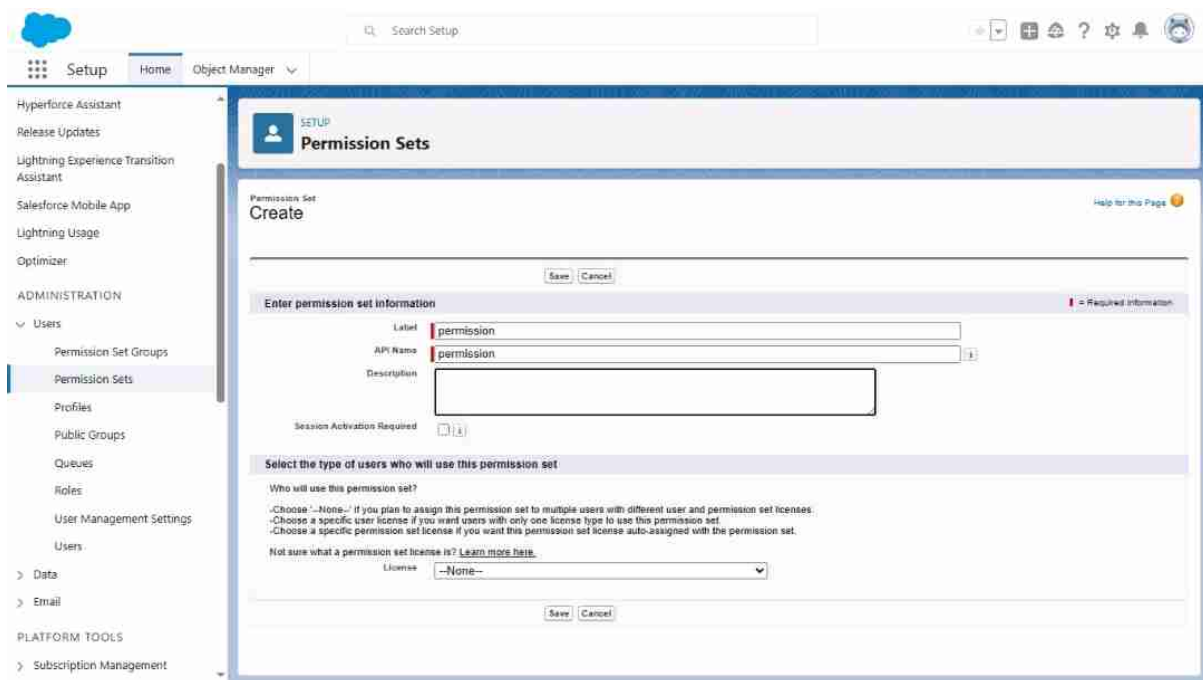
1. Follow the same steps as above but create a separate sharing rule for User B.
2. This rule should share records owned by members of "UserA_Group" with the "UserB_Group."
3. Define the criteria based on which records should be shared.
4. Save the sharing rule.



The screenshot shows the Salesforce Setup interface with the 'Users' section selected in the left sidebar. The 'New User' form is displayed, containing the following fields:

- General Information:**
 - First Name: Sanjay
 - Last Name: P
 - Alias: sp
 - Email: 2k20cse171@knot.ac.in
 - Username: 2k22cse171@knot.ac.in
 - Nickname: User1696315620912300622
 - Title: (empty)
 - Company: (empty)
 - Department: (empty)
 - Division: (empty)
- Role and License:**
 - Role: <None Specified>
 - User License: Salesforce Platform
 - Profile: Bmanager
- Active and User Types:**
 - 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 (0/0)
 - Accessibility Mode (Screen Only): ☐
 - High Contrast Palette on Charts: ☐
 - Load Lightning Pages While: ☒

Step 3: Assign Records Ownership



The screenshot shows the Salesforce Setup interface with the 'Permission Sets' section selected in the left sidebar. The 'Create' form is displayed, containing the following fields:

- Enter permission set information:**
 - Label: permission
 - API Name: permission
 - Description: (empty)
 - Session Activation Required: ☐
- Select the type of users who will use this permission set:**
 - Who will use this permission set?
 - Choose --None-- if you plan to assign this permission set to multiple users with different user and permission set licenses.
 - Choose a specific user license if you want users with only one license type to use this permission set.
 - Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.
 - Not sure what a permission set license is? [Learn more here.](#)
 - License: --None--

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Edit Properties

Manage Assignments

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 Recount Insights	No Access	—	—
Alternative Payment Methods	No Access	27	—
API Availability 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 Approvals	No Access	—	—
Appointment Schedule Logs	No Access	—	—
Appointment Topic Time Slots	No Access	5	—
Asset Actions	No Access	30	—
Asset Action Sources	No Access	15	—
Asset Relationships	—	10	—
Assets	No Access	42	—
Asset State Prints	No Access	11	—

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Childs

Save

Cancel

Tab Settings

Available

Visible

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 type="checkbox"/>
Created By	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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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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Operating Hours Holders	7	---
Opportunities	No Access	26
Opportunity Contact Role	---	6
Opportunity Product	---	14
Order Products	---	15
Orders	No Access	33
Parents	No Access	4
Party Consents	No Access	18
Payment Authorization Adjustments	No Access	24
Payment Authorizations	No Access	30
Payment Gateway Logs	No Access	---
Payment Gateways	No Access	6
Payment Groups	No Access	1
Payment Line Items	No Access	20
Payments	No Access	41
Pending Order Summaries	No Access	---
Pending Order Summary Processed Events	No Access	---
Price Book Entries	---	9
Price Books	No Access	6
Privacy Consents	No Access	---
Problem Related Items	---	10
Problems	No Access	21
Process Cart Pricing Events	No Access	---
Process Cart Pricing Response Events	No Access	---
Process Exceptions	No Access	12
Product Attributes	---	3
Product Attribute Set Products	---	2

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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 type="checkbox"/>
Created By	<input checked="" type="checkbox"/>	<input type="checkbox"/>

<https://www-36e-dev-ed.dev.my.salesforce.com/one/app/#/alphaRedirect?OPSSj000007Uvo/e7c:EntityPermissions&co=D115j000002r15H&utp:sp1>

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PERMISSION SET 'PERMISSION' > MANAGE ASSIGNMENT EXPIRATION

Select Users to Assign

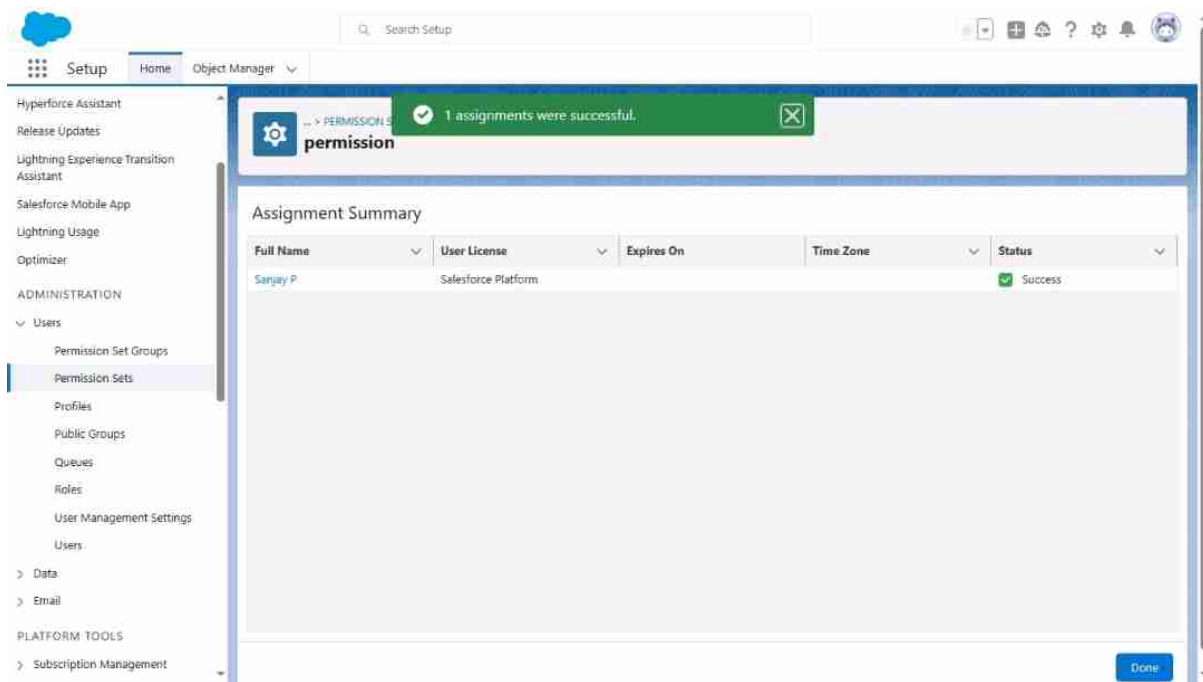
All Users

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.00d5j00000cismqean.eodzikisrft@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 checked="" type="checkbox"/>	Sanjay P	sp	2k22cse171@klot.ac.in	<input checked="" type="checkbox"/>		Manager
<input type="checkbox"/>	Security User	sec	insightssecurity@00d5j00000cismqean.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.**

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Users

All Users

Help for this Page

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

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

View: All Users

[New User](#)
[Reset Password\(s\)](#)
[Add Multiple Users](#)

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	A. Senil	sa	2921cae179@light.ac.in		✓	Manager
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatter.00d50000000000000000000000000000@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	P. Sanjay	SR	2922cae171@light.ac.in		✓	Binamanager
<input type="checkbox"/> Edit	S. Chandru	CS	au011220104303@nausammuthaluan.com		✓	System Administrator
<input type="checkbox"/> Edit	User Integration	integ	integration@00d50000000000000000000000000000@light.ac.in		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	SEC	insightsecurity@00d50000000000000000000000000000@light.ac.in		✓	Analytics Cloud Security User

[New User](#)
[Reset Password\(s\)](#)
[Add Multiple Users](#)

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All Profiles

Help for this Page

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

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

View: All Profiles

[New Profile](#)
[Delete](#)
[Create New View](#)

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

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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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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 | Enabled Apex Class Access | Enabled Visualforce Page Access | Enabled External Data Source Access | Enabled Named Credential Access | Enabled External Credential Principal Access | Enabled Custom Metadata Type Access | Enabled System Settings Definitions Access | Enabled Flow Access | Enabled Service Presence Status Access | Enabled Custom Permissions

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

Custom Profile: ☒

Page Layouts

Standard Object Layouts

Global: Global Layout (View Assignment)

Email Application: Not Assigned (View Assignment)

Home Page Layout: Home Page Default (View Assignment)

Account: Account Layout (View Assignment)

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

Appointment Invitation: Appointment Invitation Layout (View Assignment)

Asset: Asset Layout

Operating Hours: Operation Hours Layout (View Assignment)

Order: Order Layout (View Assignment)

Order Product: Order Product Layout (View Assignment)

Payment: Payment Layout (View Assignment)

Payment Authorization: Payment Authorization Layout (View Assignment)

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

Payment Gateway: Payment Gateway Layout

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

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

Session Settings

Session Times Out After: 2 hours of inactivity

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

Password Policies

User passwords expire in: 90 days

Enforce password history: 3 passwords remembered

Minimum password length: 8

Password complexity requirement: Must include alpha and numeric characters

Password question requirement: Cannot contain password

Maximum invalid login attempts: 10

Lockout effective period: 15 minutes

Obscure secret answer for password resets: ☐

Require a minimum 1 day password lifetime: ☐

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

Save

Save & New

Cancel

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

Service Provider Access

Tab Settings

☐ Override 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... Naan Mudhalvan 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 | [Add](#) | [Create New User](#)

[New User](#) | [Reset Password\(s\)](#) | [Add Multiple Users](#)

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	A. Sunil	sa	2k21cse176@kiot.ac.in		<input checked="" type="checkbox"/>	Manager
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatter.00450000000000000000000000000000@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	P. Sanjay	sq	2k22cse171@kiot.ac.in		<input checked="" type="checkbox"/>	Employee
<input type="checkbox"/> Edit	S. Chandru	CS	asf11220164303@naammudhalvan.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	User Integration	integ	integration00000000000000000000000000000000@integration.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insightsecurity00000000000000000000000000000000@insightsecurity.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

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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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New User

[Save](#) | [Save & New](#) | [Cancel](#)

User Edit

General Information

First Name **Role**

Last Name **User License**

Alias **Profile**

Email **Active** ☒

Username **Marketing User** ☐

Nickname **Offline User** ☐

Title **Knowledge User** ☐

Company **Flow User** ☐

Department **Service Cloud User** ☐

Division **Site.com Contributor User** ☐

WDC User ☐ **Site.com Publisher User** ☐

Data.com User Type **WDC User** ☐

Data.com Monthly Addition Limit **WDC User** ☐

Accessibility Mode (Classic Only) ☐ **WDC User** ☐

High-Contrast Palette on Charts ☐ **WDC User** ☐

Load Lightning Pages While ☐ **WDC User** ☐

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User: Sunil A

Permission Set Assignments (0) | Permission Set Assignments Authorized (0) | Permission Set Group Assignments (0) | Permission Set License Assignments (0) | Personal Groups (0) | Public Group Memberships (0) | Queue Memberships (0) | Team (0) | Managers in the Role Hierarchy (0) | OAuth Apps (0) | Third-Party Account 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	Salesforce Platform
Alias	sa	User License	chan
Email	2k20cse176@knot.ac.in	Profile	chan
Username	2k20cse176@knot.ac.in	Active	<input checked="" type="checkbox"/>
Nickname	User16963214906002329619	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 Kolankondalp o Mallanamudram 637593 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	<input type="checkbox"/>
Delegated Approver		Data.com User Type	View
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/>
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/>
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/>

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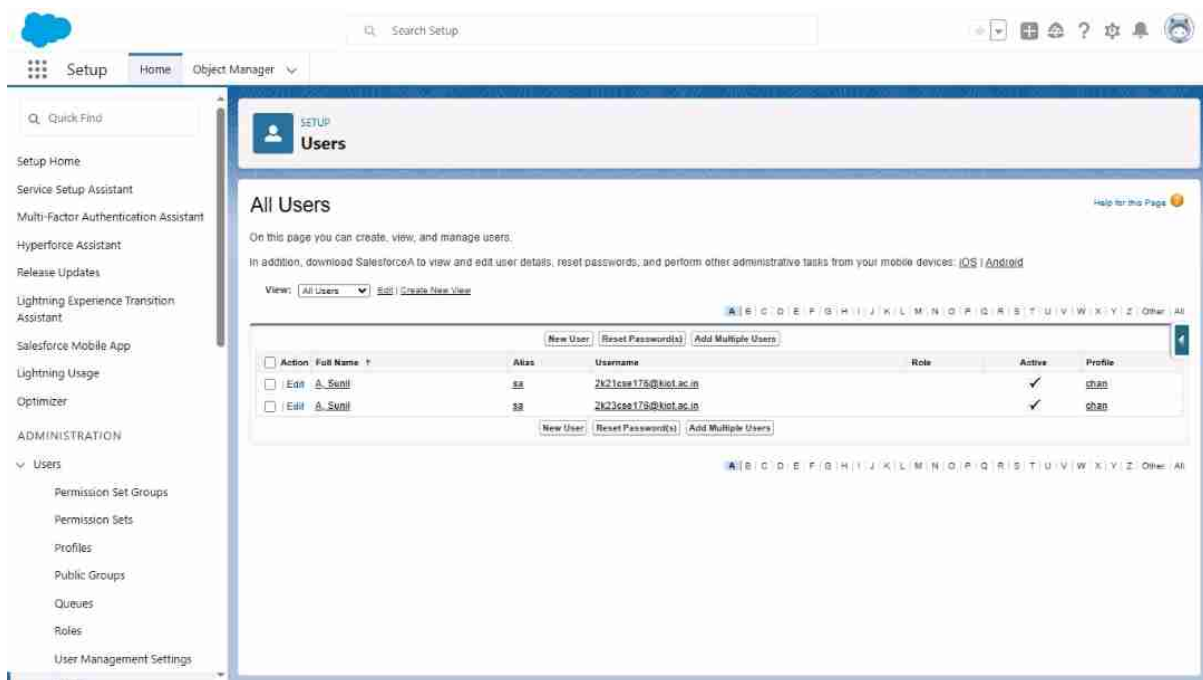
User Edit: Sunil A

Save | Save & New | Cancel

General Information

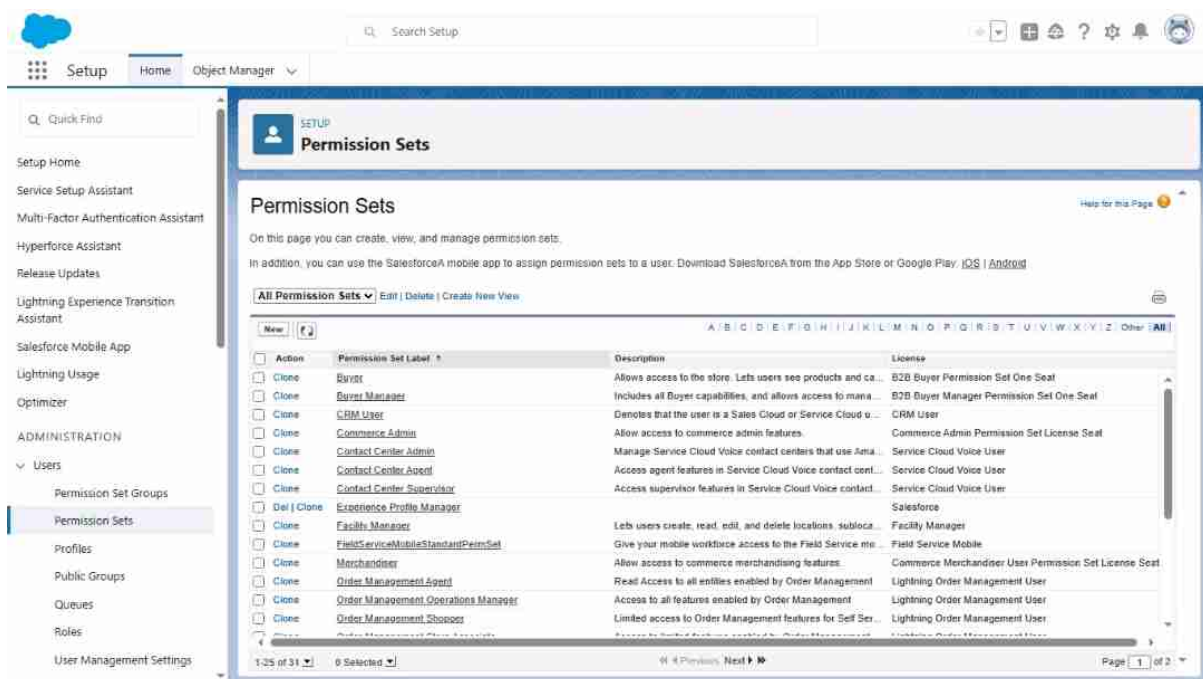
First Name: Sunil
Last Name: A
Alias: sa
Email: 2k20cse176@knot.ac.in
Username: 2k20cse176@knot.ac.in
Nickname: User169631476178576A938
Title:
Company: Male
Department:
Division:

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:
Accessibility Mode (Classic Only): ☐
High-Contrast Palette on Charts: ☐



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

1. In the "Permission Set Detail" page, click on "Manage Assignments."
2. Click "Add Assignments" and select the user who needs delete access.
3. Save the assignment.



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Permission Sets

permission01

Find Settings | Clone | Delete | Edit Properties | Manage Assignments

Permission Set Overview

Description	API Name
permission01	permission01

Session Activation Required ☐

Apps

App Permissions

App Class Access

Visualforce Page Access

External Data Source Access

Edit Properties

Label: permission01

API Name: permission01

Description:

Session Activation Required: ☐

Save Cancel

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permission01

Find Settings | Clone | Delete | Edit Properties | Manage Assignments

Permission Set Overview | Object Settings | **Accounts**

Accounts

Object Permissions

Permission Name	Enabled
Read	<input type="checkbox"/>
Create	<input 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
Account Name	<input type="checkbox"/>	<input type="checkbox"/>
Account Number	<input type="checkbox"/>	<input type="checkbox"/>
Account Owner	<input type="checkbox"/>	<input 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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permission01

Find Settings... Clone Delete Edit Properties Manage Assignments

Permission Set Overview Object Settings Accounts

Accounts

Edit

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

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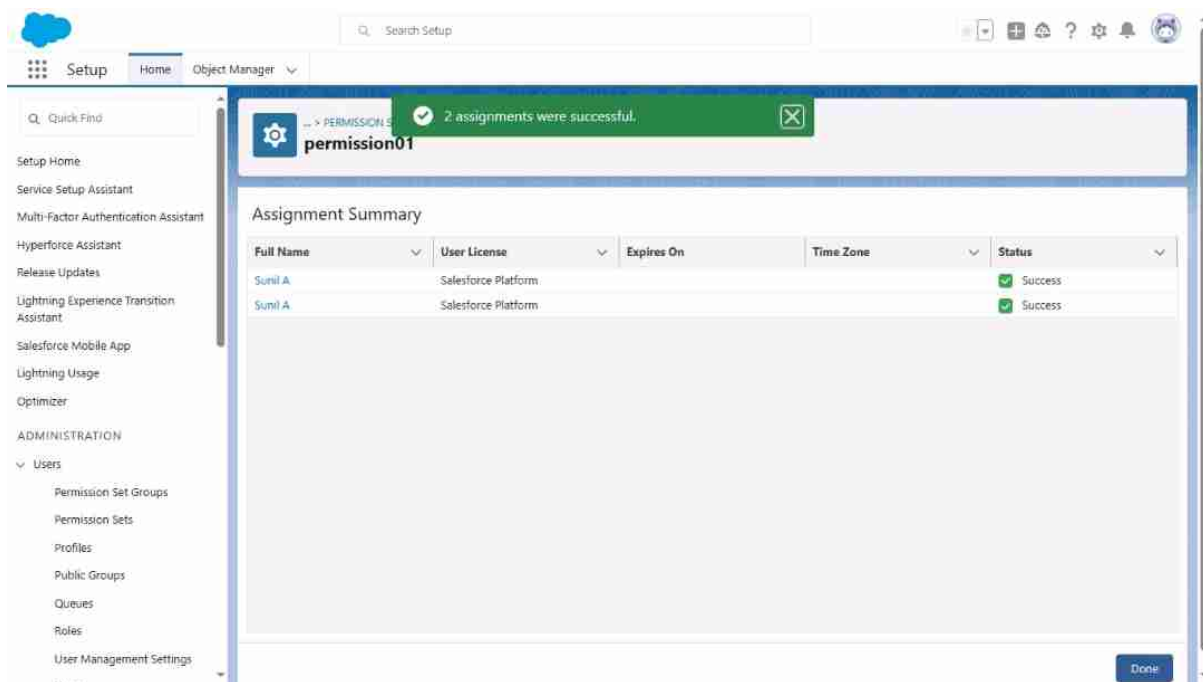
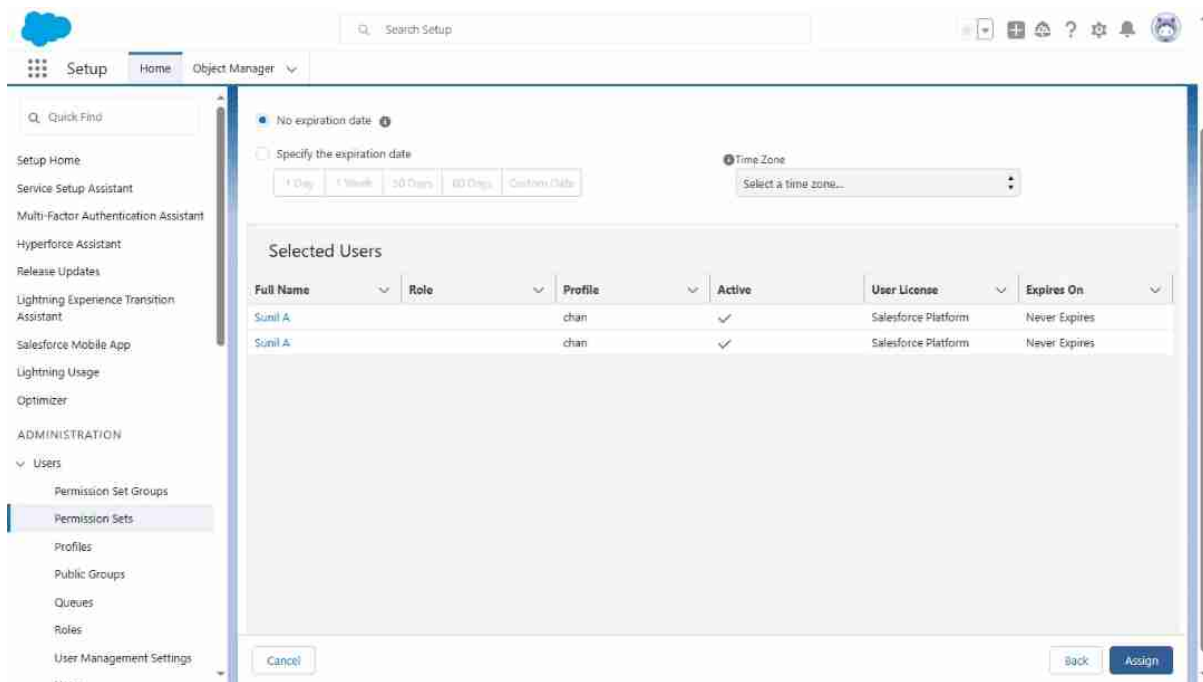
2 items selected

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	chatty00d5j00000cismqean.ecdfzki0srf@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

Next



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

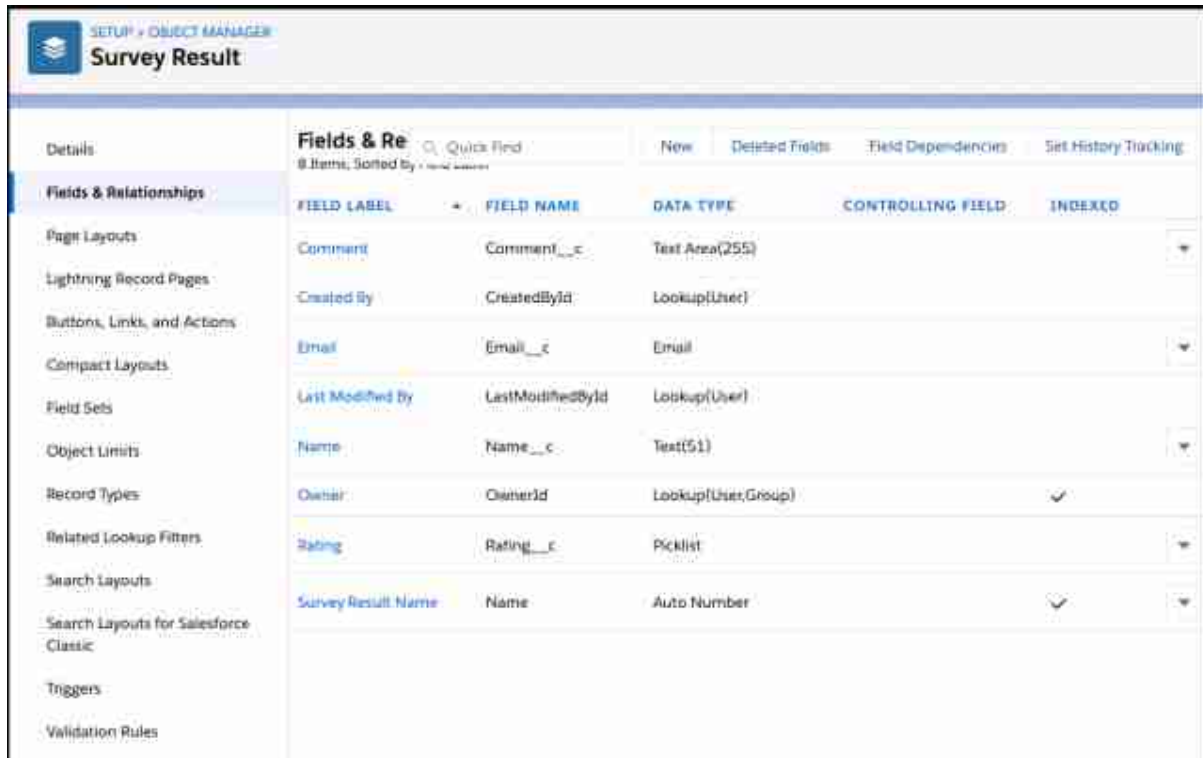
Step 1: Create a custom object

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.



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		Edit in Builder	Edit	Clone
Thank You Email - Survey				
Details	Related			
Information				
Email Template Name	Thank You Email - Survey		Related Entity Type	Survey Result
Description			Folder	Public Email Templates
Made at Email Template Builder				
Message Content				
Subject	Thank You For Completing Our Survey!		Enhanced Letterhead	
HTML Value	<pre> 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 </pre>			
Additional Information				
Created By	Rakesh Gupta, 12/21/2020, 4:23 PM		Last Modified By	Rakesh Gupta, 12/21/2020, 4:32 PM

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 ?

Object Survey Result

Email Template ! Thank You Email - Survey ?

Protected Component ☐

Recipient Type ! Search: User S for: Find

Recipients

Available Recipients		Selected Recipients
User: Integration User	Add → ← Remove	Email Field: Email
User: Rakesh Gupta		
User: Security User		

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

Additional Emails

From Email Address ! Current User's email address S

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

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

Row 3:
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 ×

Email__c
←
A Email > Value ×

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

Rating__c
←
A Rating ×

+ Add Field

☐ Manually assign variables

Cancel
Done

Step 4.3: Salesforce Flow – Call an Acton – 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

* Flow API Name

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...
Q

Survey {!\$Flow.CurrentDateTime}

Last Modified

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

Status:

Active

Type:

Screen Flow

Version Number:

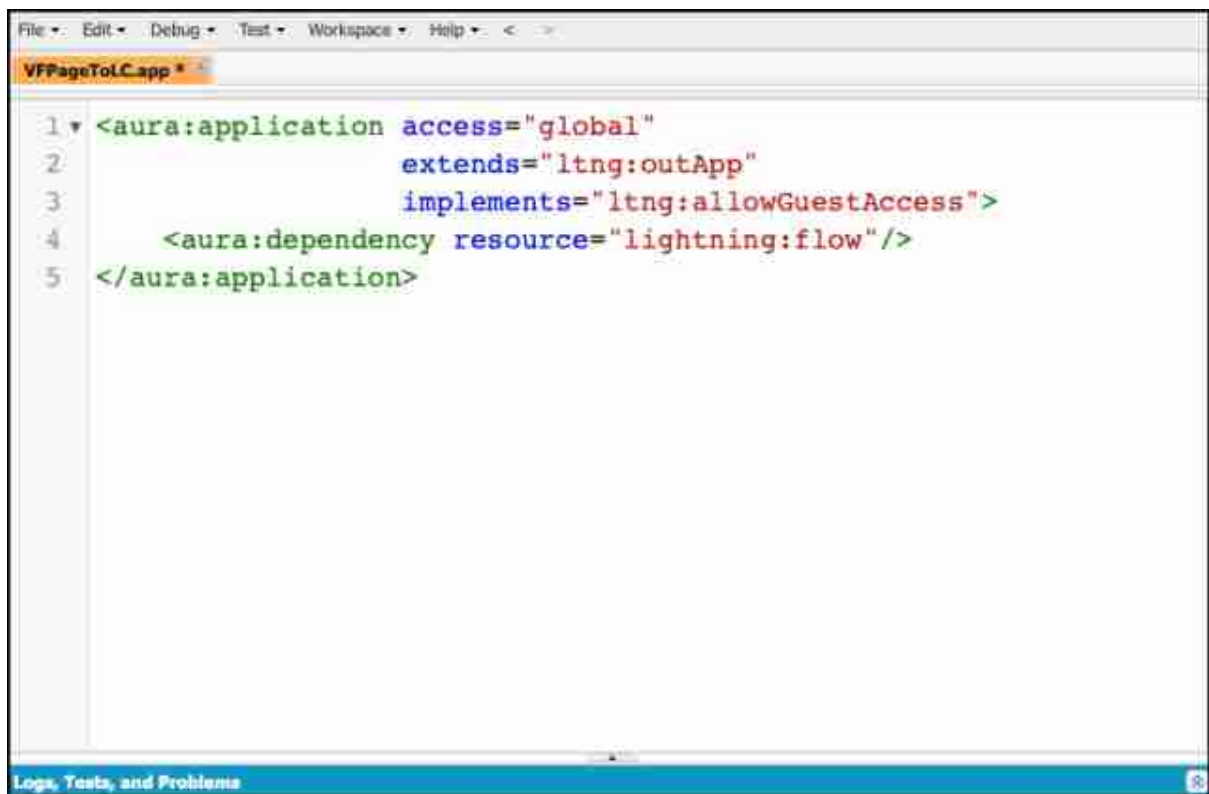
2

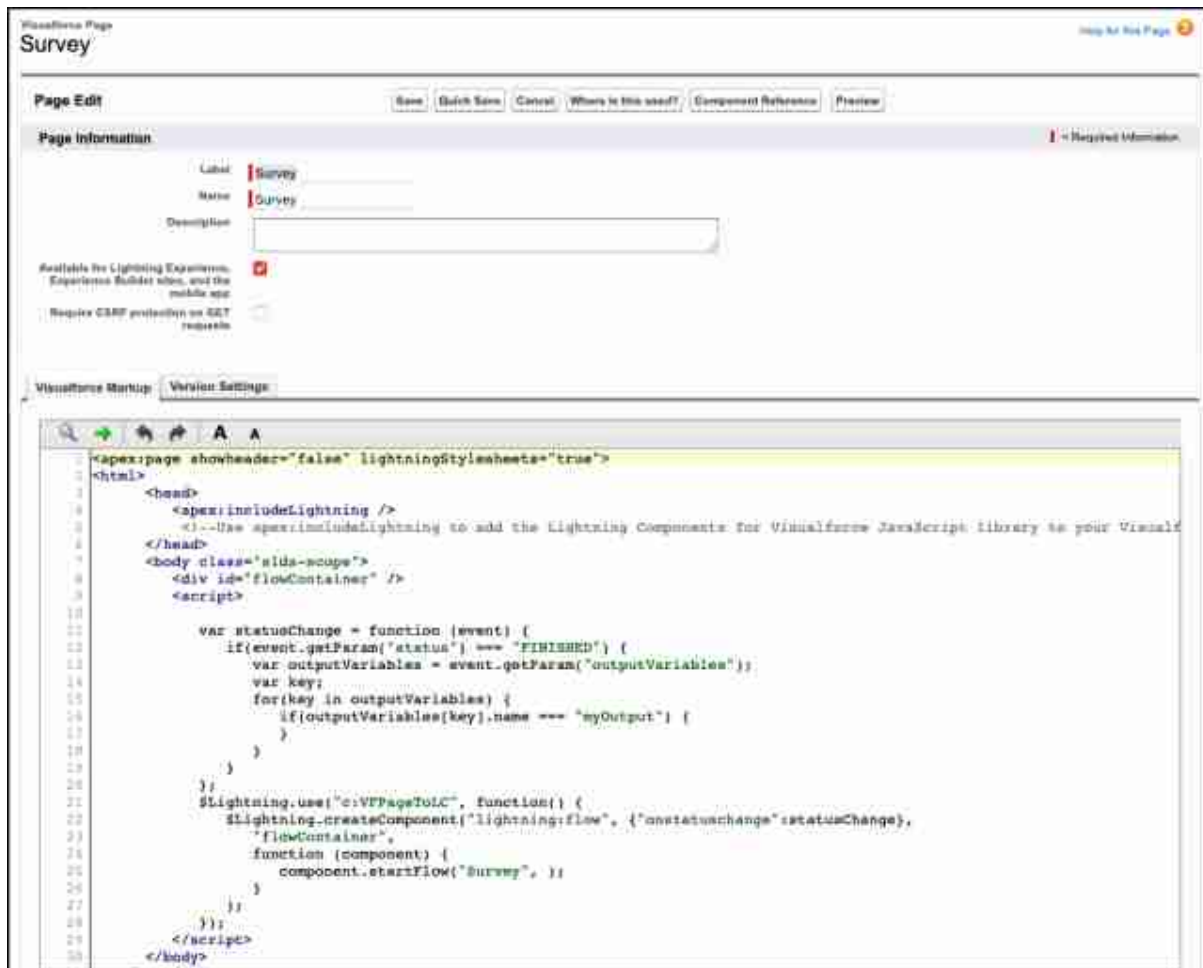
Cancel
Save

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.





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



Site Name



Site Description

Site Contact



Default Record Owner



Default Web Address



Active



Active Site Home Page

[\[Preview\]](#)

Inactive Site Home Page

[\[Preview\]](#)

Site Template



Site Robots.txt



Site Favorite Icon



Analytics Tracking Code



URL Rewriter Class



Enable Feeds



Clickjack Protection Level



Require Secure Connections



(HTTPS)

Lightning Features for Guest



Users

Upgrade all requests to HTTPS



Enable Content Sniffing



Protection

Enable Browser Cross Site



Scripting Protection

Referrer URL Protection



Guest Access to the Payments

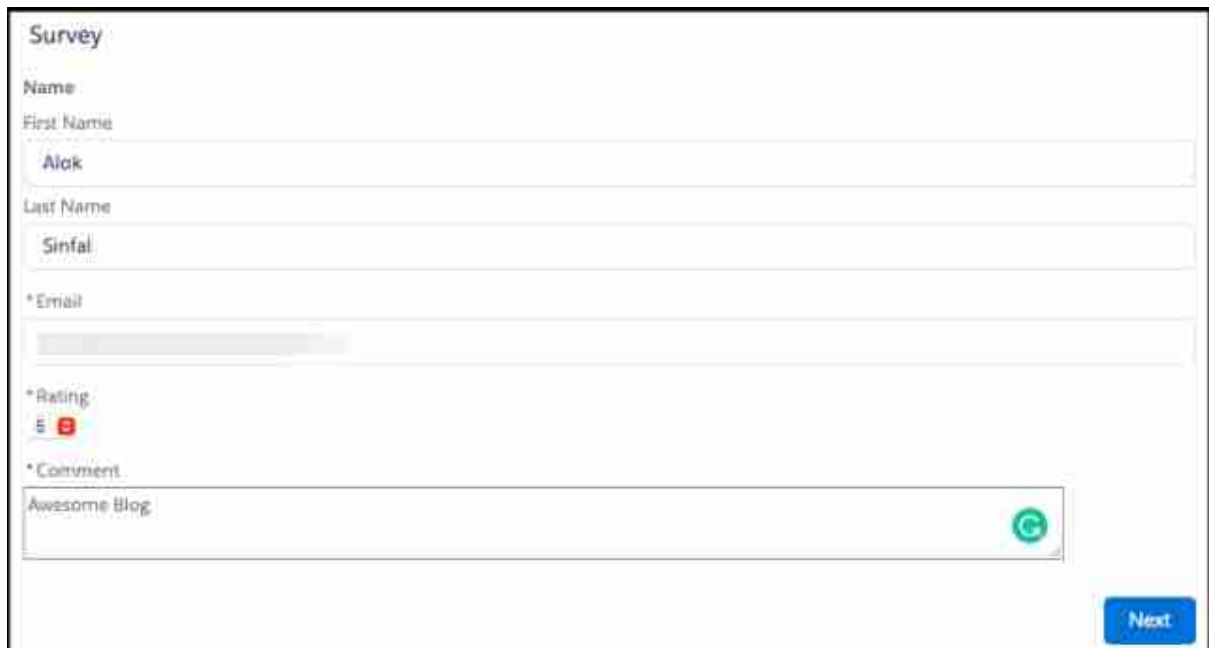


API

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:



The screenshot shows a web form titled "Survey". It contains the following fields and elements:

- Name:** A label above the "First Name" field.
- First Name:** A text input field containing the value "Alok".
- Last Name:** A text input field containing the value "Sinfal".
- *Email:** A text input field that is currently empty.
- *Rating:** A section with a small icon (a red square with a white 'G') and a radio button.
- *Comment:** A text area containing the text "Awesome Blog".
- Next:** A blue button located at the bottom right of the form.

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.