

**NAAN MUDHALVAN**

**SALESFORCE DEVELOPER**

**ASSIGNMENT 1**

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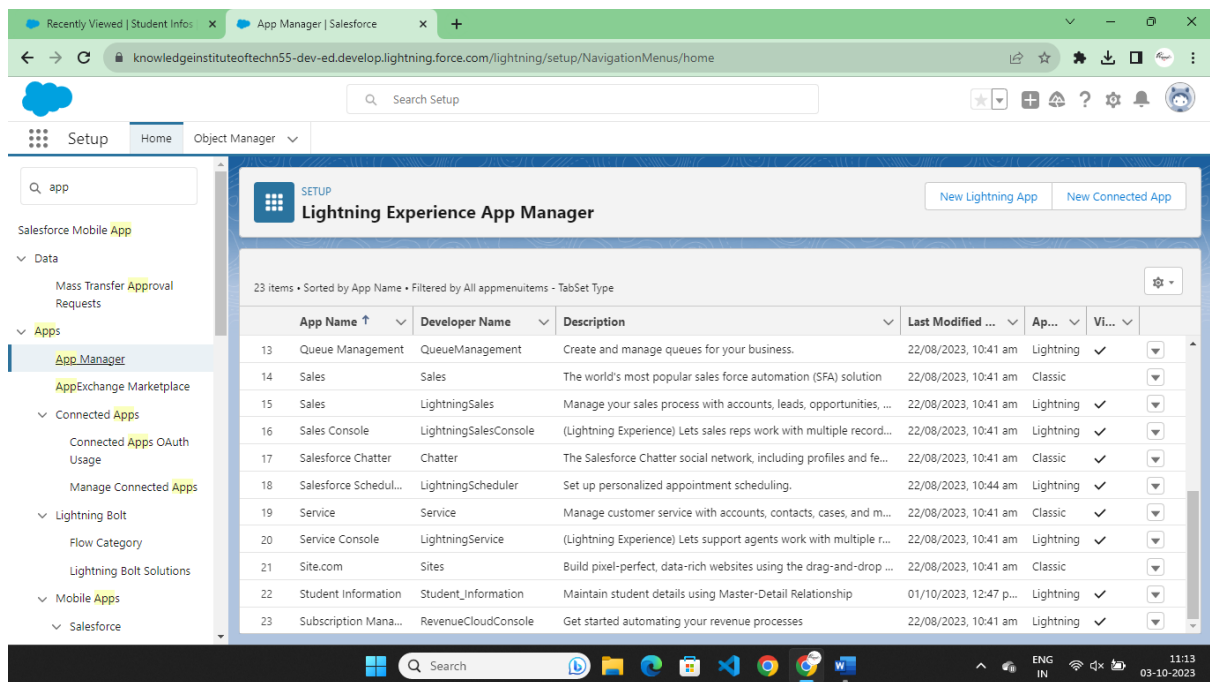
**REG NO. : 611220205045**

**BRANCH : B.TECH IT – IV YEAR**

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

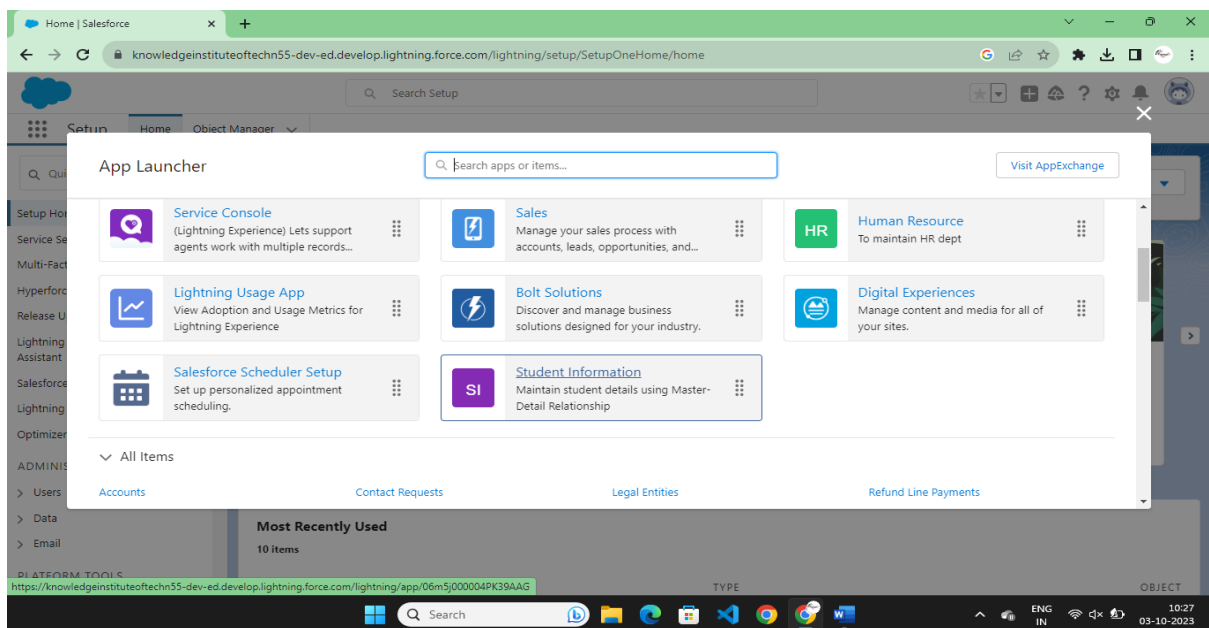
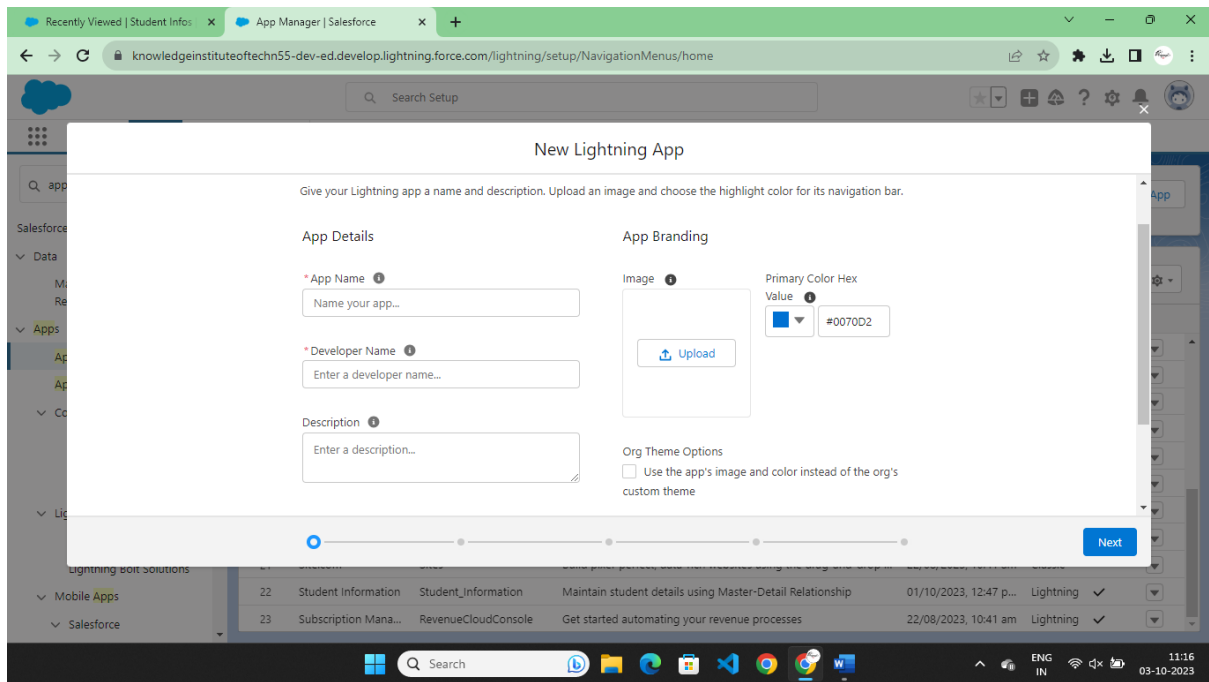
Assuming you have two custom objects, let's call them "Parent\_Object\_\_c" and "Child\_Object\_\_c," and you want to create a Master-Detail Relationship from Child\_Object\_\_c to Parent\_Object\_\_c, and a Roll-Up Summary Field on Parent\_Object\_\_c to count the related Child\_Object\_\_c records.

## Creating of Lightning App:



The screenshot displays the Salesforce Lightning Experience App Manager interface. The left sidebar shows the navigation menu with options like Setup, Home, and Object Manager. The main content area is titled "Lightning Experience App Manager" and shows a list of 23 items, sorted by App Name. The table lists various apps, including Queue Management, Sales, Sales Console, Salesforce Chatter, Salesforce Scheduler, Service Console, and Student Information. The table columns are App Name, Developer Name, Description, Last Modified, App Type, and Visibility. The Student Information app is highlighted, showing it was last modified on 01/10/2023, 12:47 p.m. and is a Lightning app with full visibility.

App Name	Developer Name	Description	Last Modified	App Type	Visibility
Queue Management	QueueManagement	Create and manage queues for your business.	22/08/2023, 10:41 am	Lightning	✓
Sales	Sales	The world's most popular sales force automation (SFA) solution	22/08/2023, 10:41 am	Classic	✓
Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, ...	22/08/2023, 10:41 am	Lightning	✓
Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple record...	22/08/2023, 10:41 am	Lightning	✓
Salesforce Chatter	Chatter	The Salesforce Chatter social network, including profiles and fe...	22/08/2023, 10:41 am	Classic	✓
Salesforce Schedul...	LightningScheduler	Set up personalized appointment scheduling.	22/08/2023, 10:44 am	Lightning	✓
Service	Service	Manage customer service with accounts, contacts, cases, and m...	22/08/2023, 10:41 am	Classic	✓
Service Console	LightningService	(Lightning Experience) Lets support agents work with multiple r...	22/08/2023, 10:41 am	Lightning	✓
Site.com	Sites	Build pixel-perfect, data-rich websites using the drag-and-drop ...	22/08/2023, 10:41 am	Classic	✓
Student Information	Student_Information	Maintain student details using Master-Detail Relationship	01/10/2023, 12:47 p...	Lightning	✓
Subscription Mana...	RevenueCloudConsole	Get started automating your revenue processes	22/08/2023, 10:41 am	Lightning	✓



## Tabs:

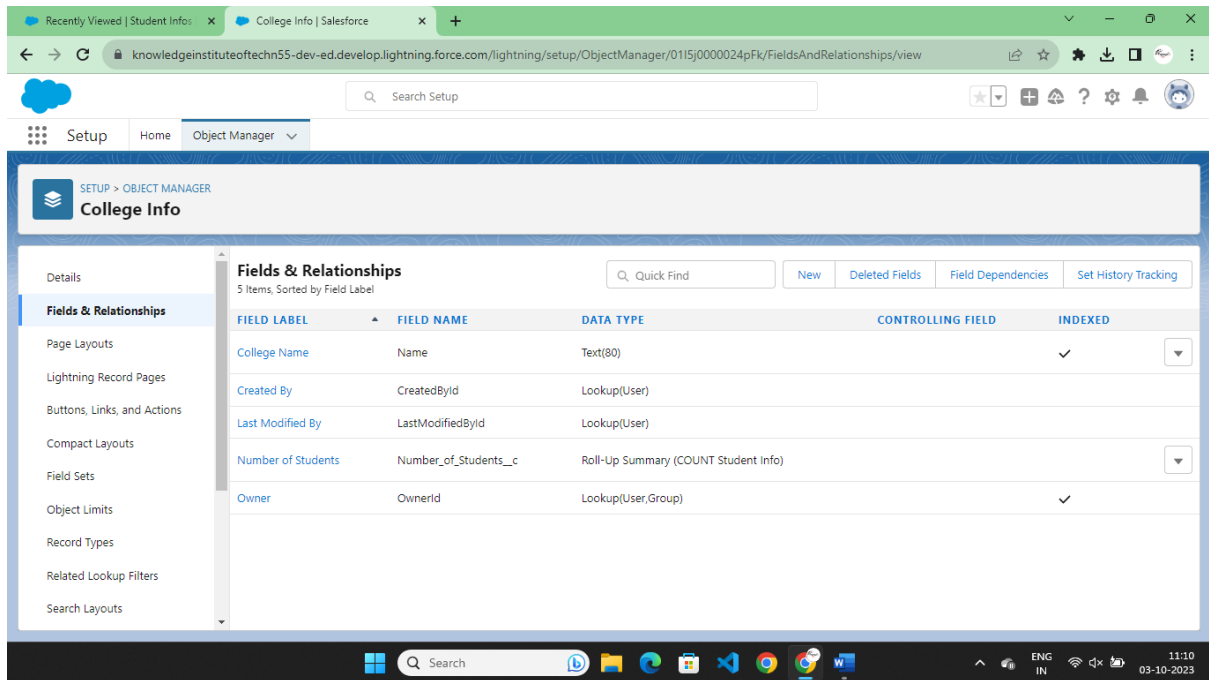
The screenshot shows the Salesforce Setup interface. The left sidebar contains a search bar with 'tabs' entered, and a list of navigation items including 'User Interface', 'Rename Tabs and Labels', and 'Tabs'. The main content area is titled 'New Custom Object Tab' and shows 'Step 1 of 3: Enter the Details'. The form includes fields for 'Object' (set to '--None--'), 'Tab Style' (set to 'None'), 'Splash Page Custom Link' (set to '--None--'), and a 'Description' text area. The bottom of the screen shows a Windows taskbar with various application icons and a system clock displaying 11:17 on 03-10-2023.

The screenshot shows the Salesforce Setup interface for 'Custom Tabs'. The left sidebar is similar to the previous screenshot. The main content area is titled 'Custom Tabs' and provides an overview of the feature. Below the text, there is a table titled 'Custom Object Tabs' with columns for 'Action', 'Label', 'Tab Style', and 'Description'. The table lists several tabs: 'College Infos' (Building style), 'Department Details' (Castle style), 'Job Applicants' (Chalkboard style), 'Student Details' (Caduceus style), 'Student Infos' (Building style), and 'students' (Box style). The bottom of the screen shows a Windows taskbar with a system clock displaying 10:28 on 03-10-2023.

Action	Label	Tab Style	Description
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">College Infos</a>	Building	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Department Details</a>	Castle	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Job Applicants</a>	Chalkboard	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Student Details</a>	Caduceus	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Student Infos</a>	Building	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">students</a>	Box	

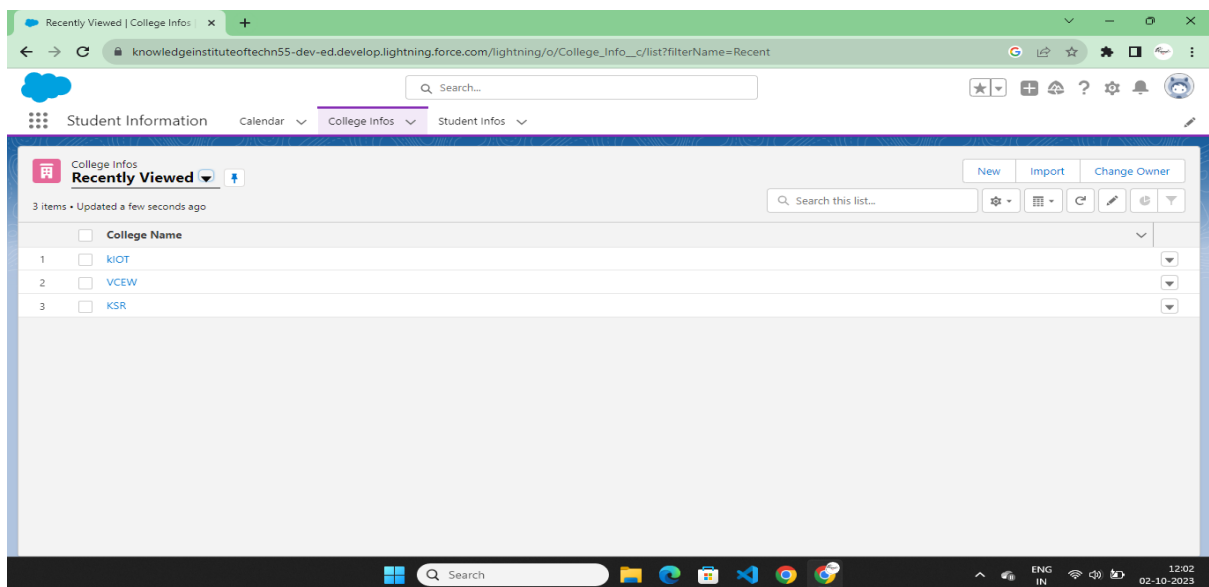
## 1.Create Custom Objects:

- Create the "Parent\_Object\_\_c" custom object if you haven't already.



The screenshot shows the Salesforce Setup interface for the 'College Info' custom object. The 'Fields & Relationships' tab is selected, displaying a table of fields. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The fields listed are: College Name (Text(80)), Created By (Lookup(User)), Last Modified By (Lookup(User)), Number of Students (Roll-Up Summary (COUNT Student Info)), and Owner (Lookup(User,Group)).

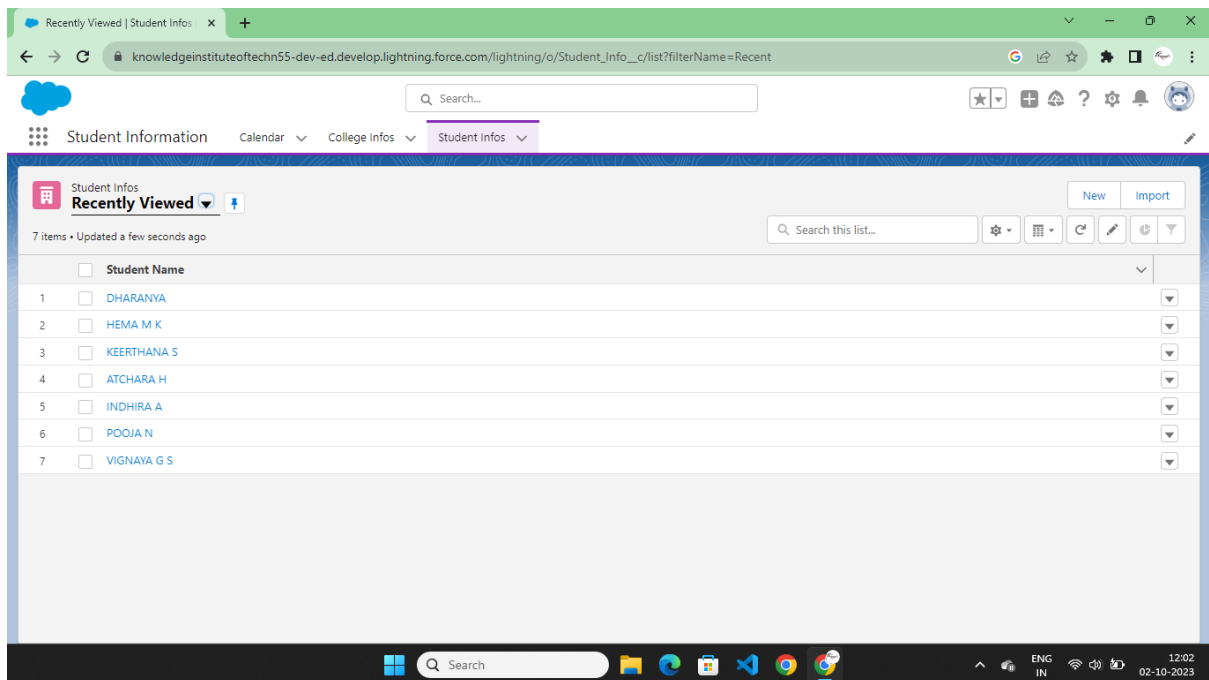
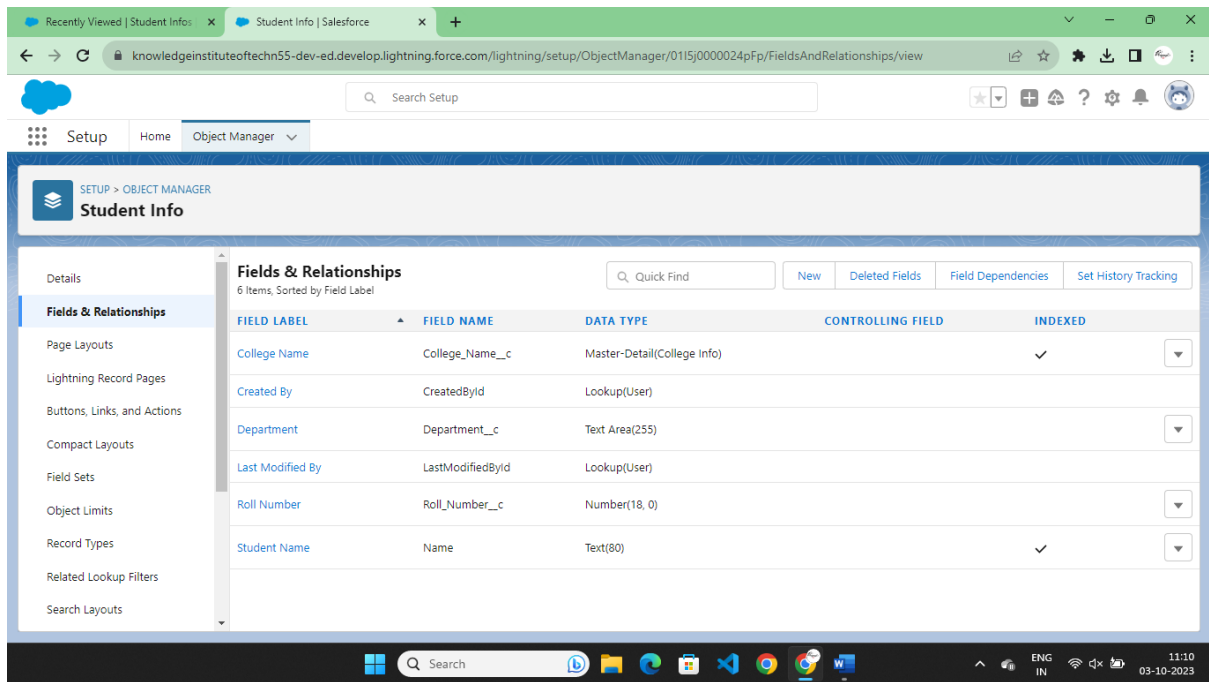
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
College Name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Number of Students	Number_of_Students__c	Roll-Up Summary (COUNT Student Info)		
Owner	OwnerId	Lookup(User,Group)		✓



The screenshot shows the Salesforce 'Student Information' list view. The 'College Info' tab is selected, and the 'Recently Viewed' filter is applied. The list displays 3 items: 1. College Name: KIOT, 2. College Name: VCEW, and 3. College Name: KSR. Each item has a checkbox and a dropdown arrow.

	College Name
1	KIOT
2	VCEW
3	KSR

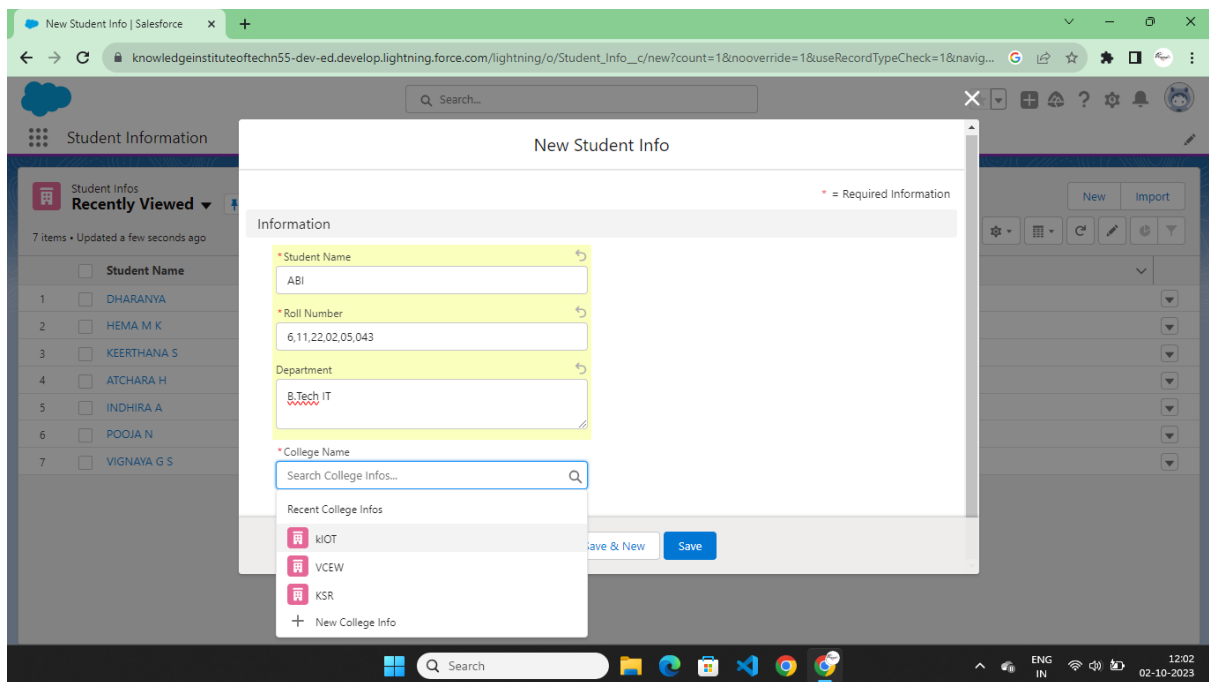
- Create the "Child\_Object\_\_c" custom object if you haven't already.



## 2.Create Master-Detail Relationship:

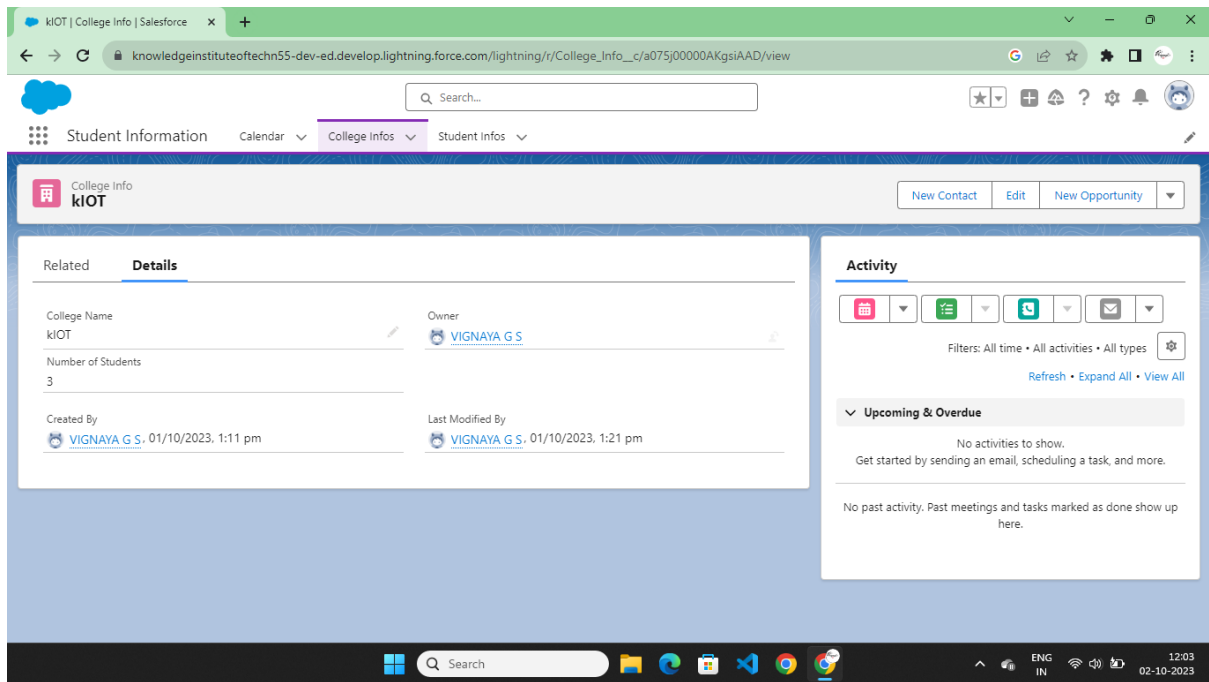
- Go to "Setup" by clicking on the gear icon in the top-right corner.
- Under "Objects and Fields," click on "Object Manager."

- Click on "Child\_Object\_\_c" to open its settings.
- In the "Fields & Relationships" section, click on "New Relationship."
- Choose "Master-Detail Relationship" as the type of relationship.
- Select "Parent\_Object\_\_c" as the parent object.
- Give the relationship a meaningful name, e.g., "Parent Relationship."
- Define other settings such as required or not, and click "Next" to finish the wizard.



### 3.Create Roll-Up Summary Field:

- After creating the Master-Detail Relationship, go back to the "Parent\_Object\_\_c" settings.
- In the "Fields & Relationships" section, click on "New" and select "Roll-Up Summary."
- Choose the "Child Relationship Name" (created in step 2, e.g., "Child\_Object\_\_r").
- Choose the aggregation operation, which is "Count" in this case.
- Define a meaningful field label (e.g., "Total Child Records").
- Optionally, define other field properties.
- Click "Next" and then "Save" to create the Roll-Up Summary Field.



Now you have successfully created a Master-Detail Relationship between the two custom objects and a Roll-Up Summary Field to calculate the total number of related records in Salesforce.

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

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

#### **Log in to Salesforce:**

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

#### **Access the User Setup:**

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

#### **Navigate to User Management:**

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

#### **Create a New User:**



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

### Fill in User Details:

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

### Save the User:

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

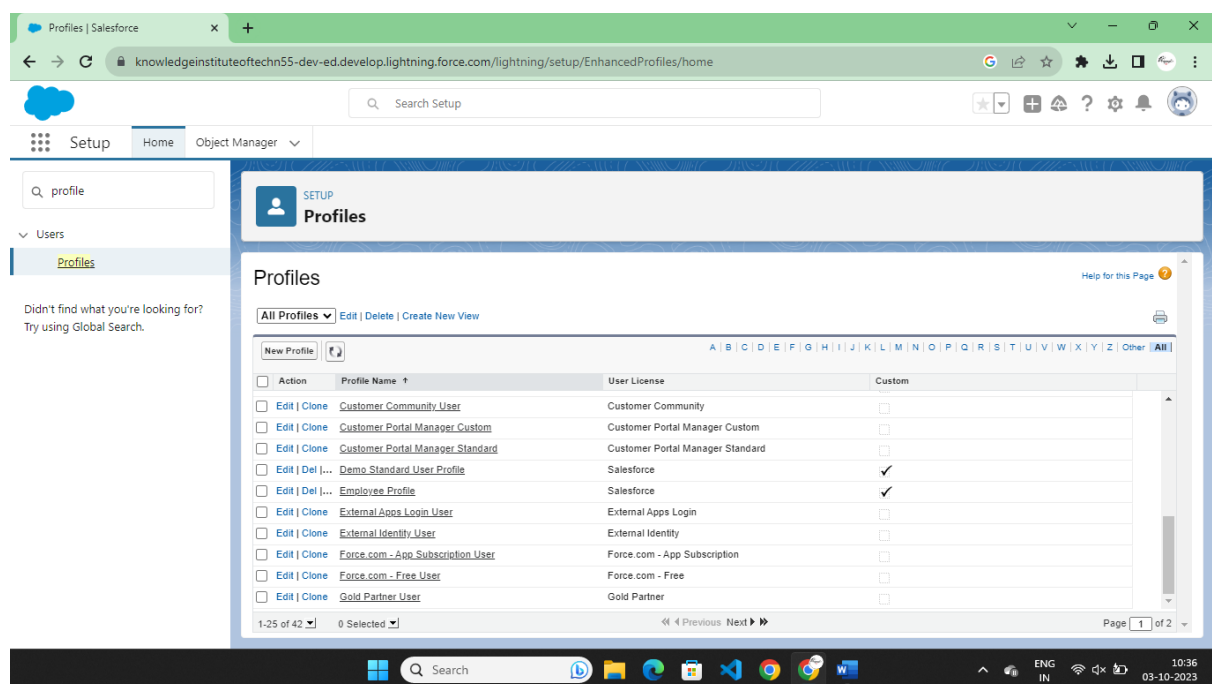
### Assign a Password:

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

### Verify User Creation:

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

### Profile Creation:

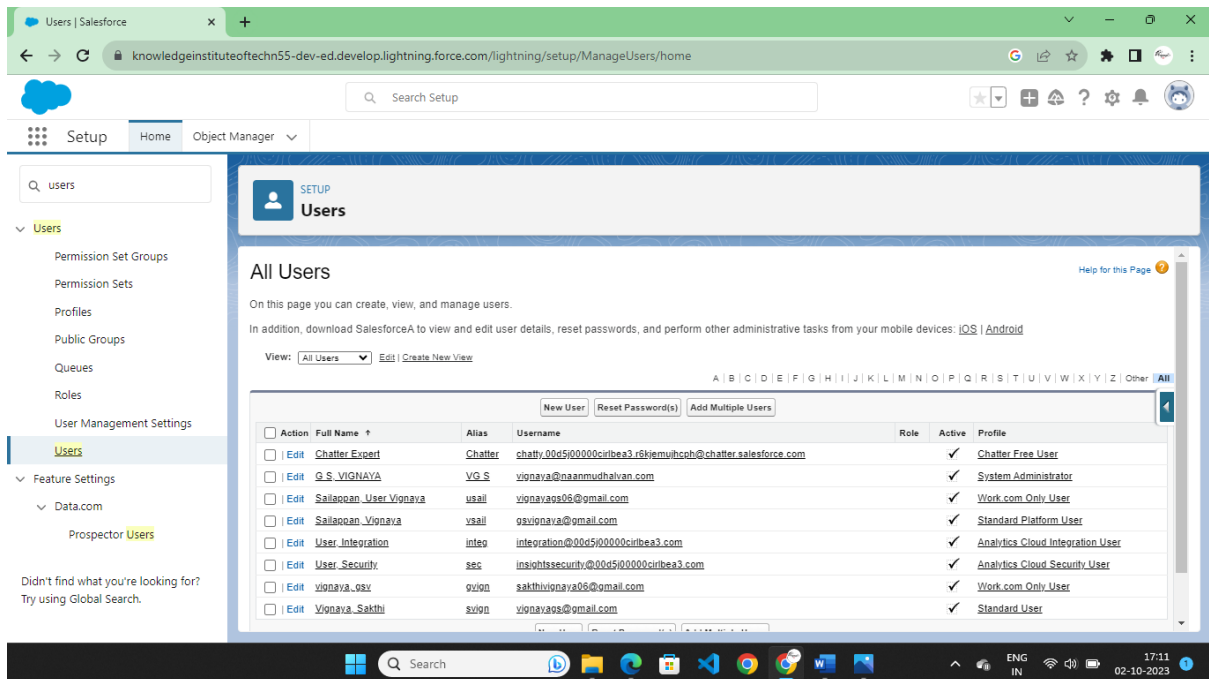


The screenshot shows the Salesforce Setup page for Profiles. The page is titled "Profiles" and includes a search bar and navigation links. The "Profiles" section is active, showing a list of profiles. The table below lists the profiles and their associated user licenses.

Action	Profile Name	User License	Custom
<a href="#">Edit</a>   <a href="#">Clone</a>	<a href="#">Customer Community User</a>	Customer Community	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	<a href="#">Customer Portal Manager Custom</a>	Customer Portal Manager Custom	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	<a href="#">Customer Portal Manager Standard</a>	Customer Portal Manager Standard	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del</a>   ...	<a href="#">Demo Standard User Profile</a>	Salesforce	<input checked="" type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del</a>   ...	<a href="#">Employee Profile</a>	Salesforce	<input checked="" type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	<a href="#">External Apps Login User</a>	External Apps Login	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	<a href="#">External Identity User</a>	External Identity	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	<a href="#">Force.com - App Subscription User</a>	Force.com - App Subscription	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	<a href="#">Force.com - Free User</a>	Force.com - Free	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	<a href="#">Gold Partner User</a>	Gold Partner	<input type="checkbox"/>

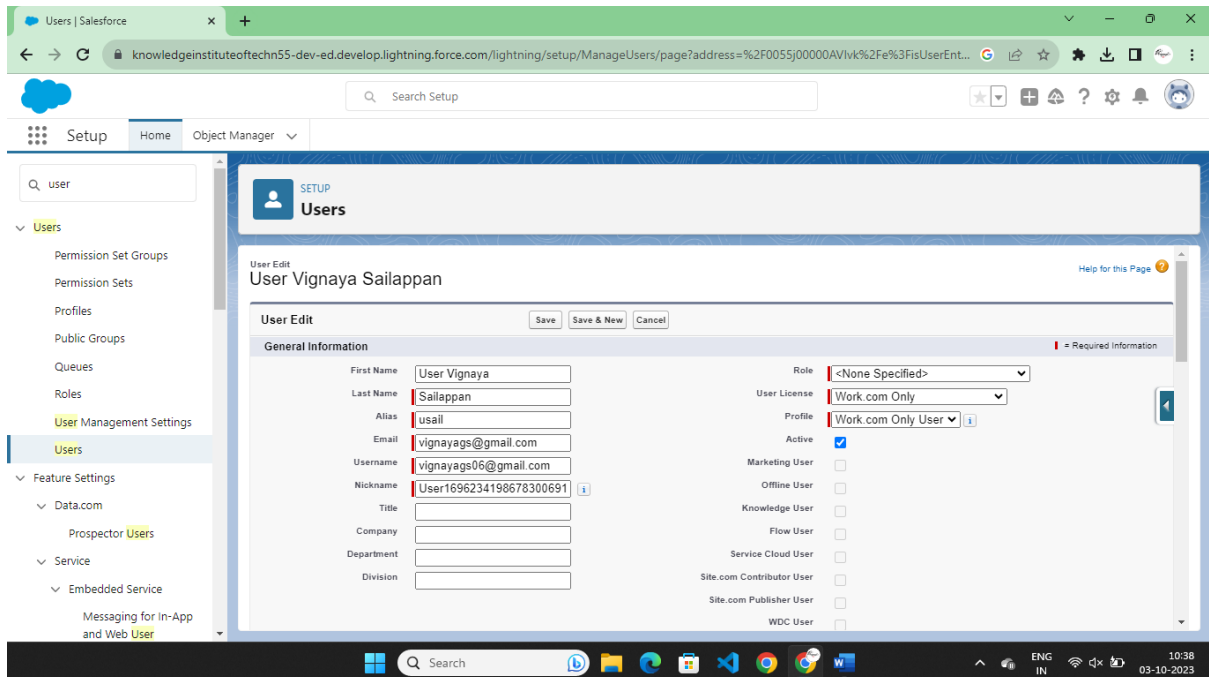
Page 1 of 2

## User Creation:



The screenshot shows the Salesforce Setup page for 'Users'. The left sidebar contains a navigation menu with options like 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', 'Users', 'Feature Settings', 'Data.com', and 'Prospector Users'. The main content area is titled 'All Users' and includes a search bar, a 'View' dropdown set to 'All Users', and a 'Create New User' button. Below this is a table of users with columns for Action, Full Name, Alias, Username, Role, Active, and Profile.

Action	Full Name	Alias	Username	Role	Active	Profile
<a href="#">Edit</a>	Chatter Expert	Chatter	chatty_00d5j00000cirtbea3_r6jgmuihpcbh@chatter.salesforce.com		✓	Chatter Free User
<a href="#">Edit</a>	Q. S. VIGNAYA	VG_S	vignaya@naanmudhalvan.com		✓	System Administrator
<a href="#">Edit</a>	Sailappan User Vignaya	usail	vignayags06@gmail.com		✓	Work.com Only User
<a href="#">Edit</a>	Sailappan Vignaya	vsail	gsvignaya@gmail.com		✓	Standard Platform User
<a href="#">Edit</a>	User Integration	integ	integration@00d5j00000cirtbea3.com		✓	Analytics Cloud Integration User
<a href="#">Edit</a>	User Security	sec	insivhtssecurity@00d5j00000cirtbea3.com		✓	Analytics Cloud Security User
<a href="#">Edit</a>	vignaya_osv	gvign	sakthivignaya06@gmail.com		✓	Work.com Only User
<a href="#">Edit</a>	Vignaya Sakthi	svign	vignayags@gmail.com		✓	Standard User



The screenshot shows the 'User Edit' form for 'User Vignaya Sailappan'. The form is divided into two main sections: 'General Information' and 'User License'. The 'General Information' section includes fields for First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, and Division. The 'User License' section includes fields for Role, User License, Profile, and Active status. The 'Active' status is checked, and the 'User License' is set to 'Work.com Only'.

Field	Value
First Name	User Vignaya
Last Name	Sailappan
Alias	usail
Email	vignayags@gmail.com
Username	vignayags06@gmail.com
Nickname	User1696234198678300691
Title	
Company	
Department	
Division	
Role	<None Specified>
User License	Work.com Only
Profile	Work.com Only User
Active	✓

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

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

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

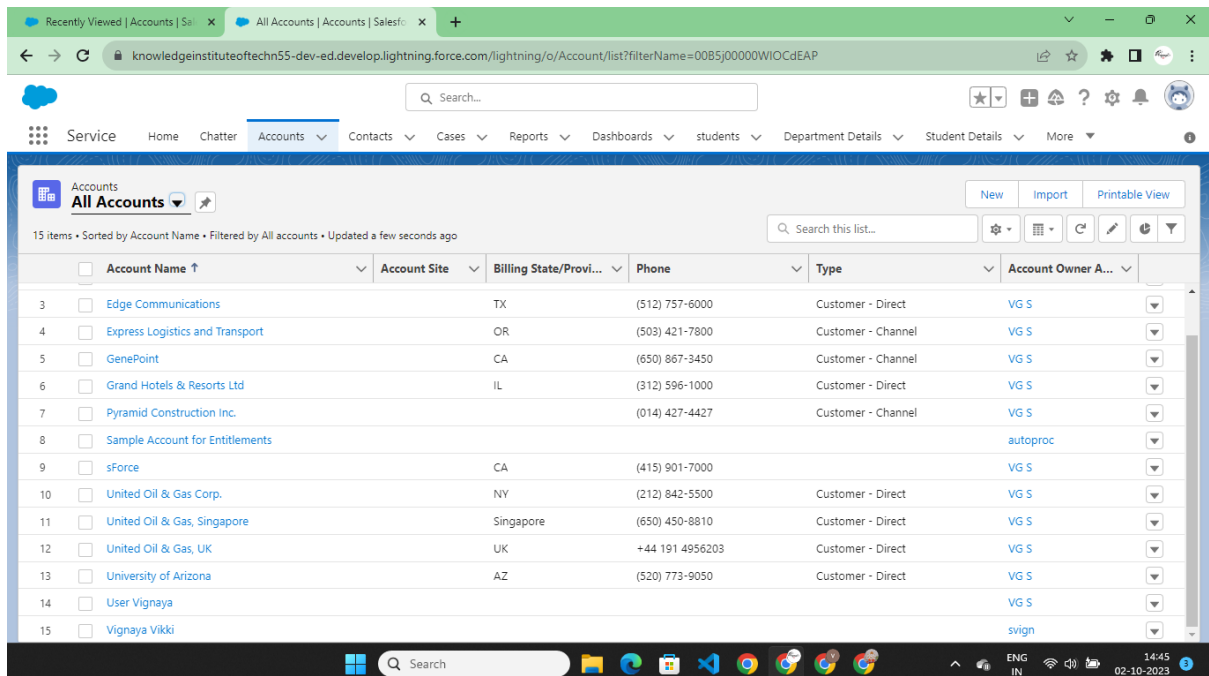
Sharing rules are automatic exceptions to org-wide defaults for particular groups of users, to give them access to records they don't own or can't normally see.

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

## In admin:

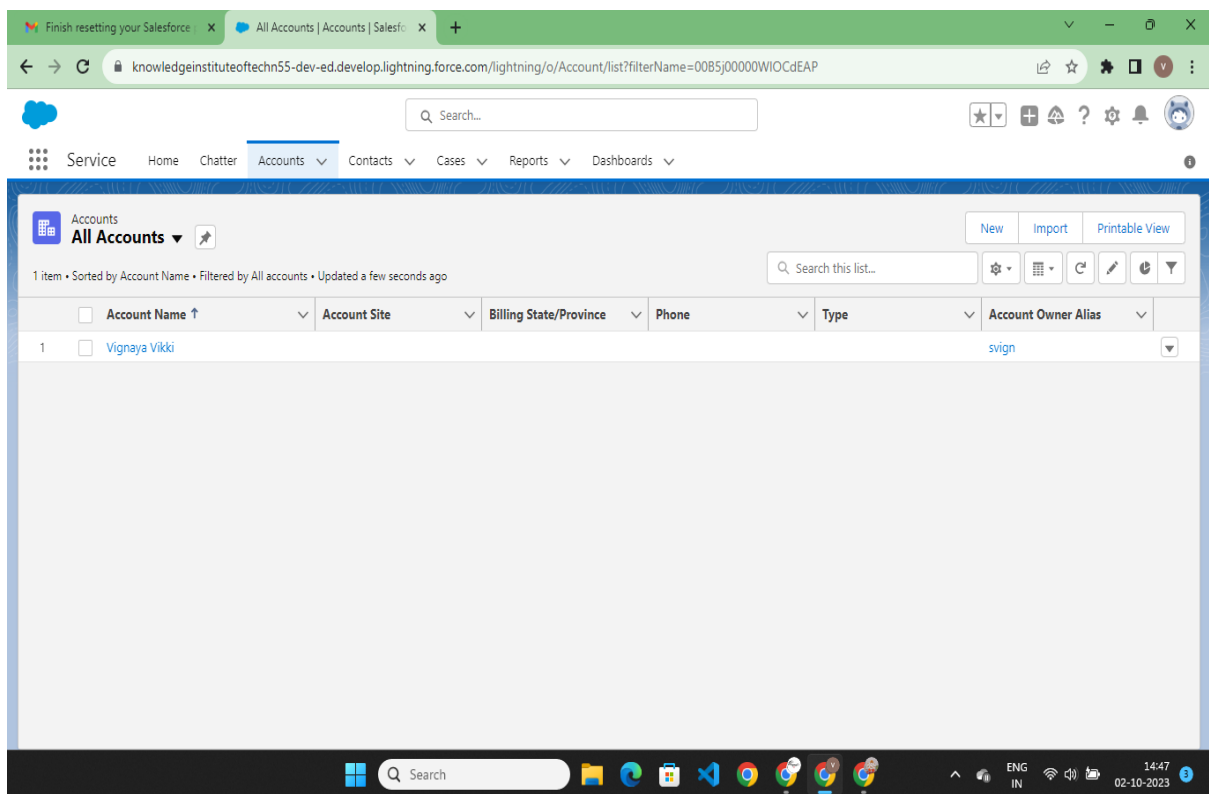
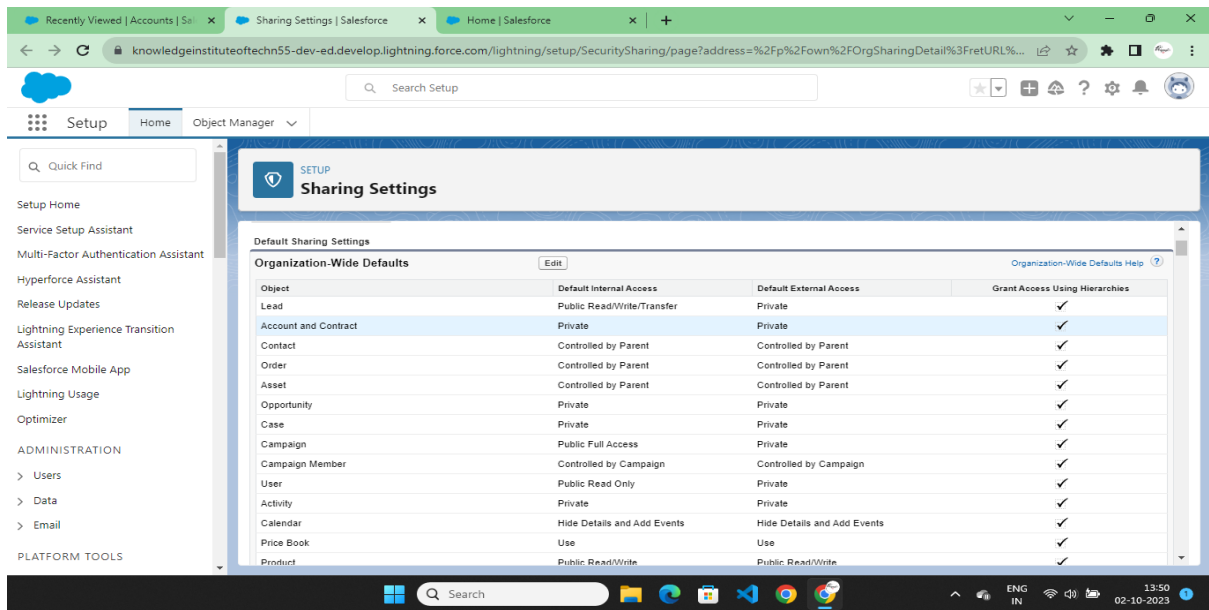
Before giving the account as private it shows all the user accounts.

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



The screenshot shows the Salesforce 'All Accounts' list view. The table contains 15 items, sorted by Account Name. The columns are Account Name, Account Site, Billing State/Province, Phone, Type, and Account Owner. The Account Owner column shows 'VG S' for most accounts, 'autoproc' for 'Sample Account for Entitlements', and 'svign' for 'Vignaya Vikki'.

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



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

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

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

Search Setup

Setup Home Object Manager

roles

Users Roles Feature Settings Sales Service Case Teams

Didn't find what you're looking for? Try using Global Search.

### Creating the Role Hierarchy

You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.

Your Organization's Role Hierarchy

Knowledge Institute of Technology

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

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Roles | Salesforce

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Search Setup

Setup Home Object Manager

roles

Users Roles Feature Settings Sales Service Case Teams

Didn't find what you're looking for? Try using Global Search.

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

Available Users Search: All Unassigned

for:

Find

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

Add  
Remove

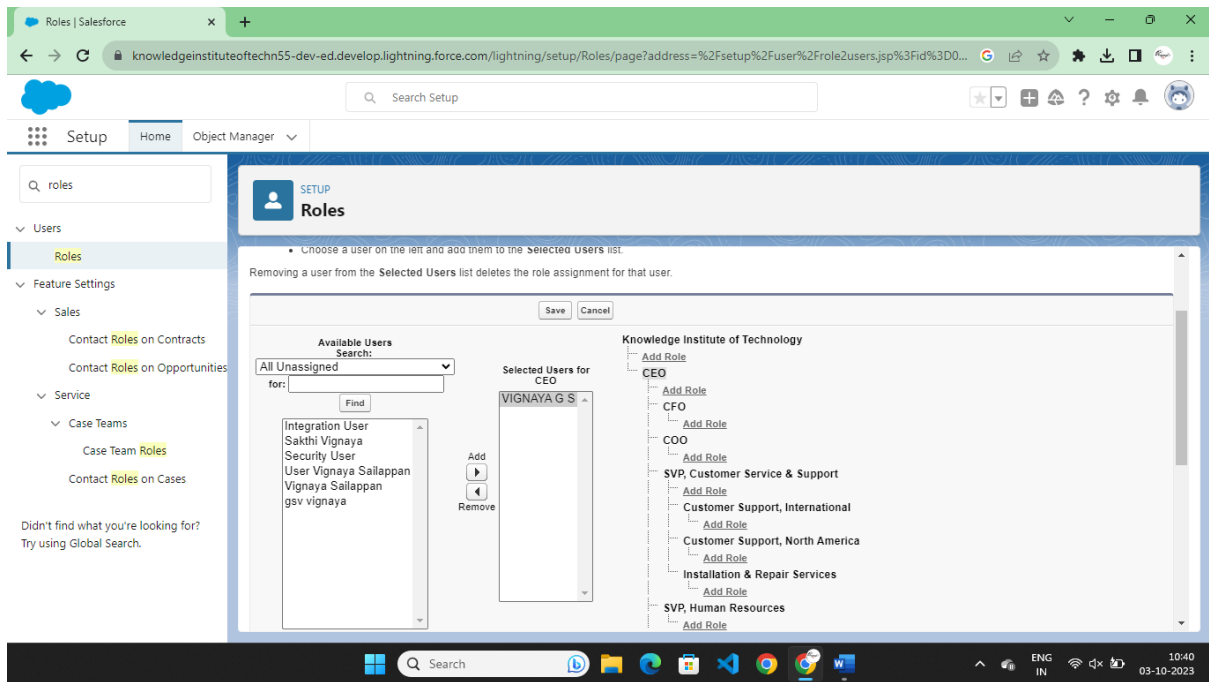
Selected Users for CFO: gsv vignaya

Save Cancel

Knowledge Institute of Technology

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

ENG IN 10:39 03-10-2023



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

If you have two users with the same profile in Salesforce and both have Create, Read, and Edit access to the Account object, but you want to grant one of them the ability to delete records while restricting the other, you can achieve this by using Permission Sets.

#### 1.Create a New Permission Set:

- Go to Setup > Permission Sets and click "New Permission Set."

#### 2. Define Object Permissions:

- In the Permission Set, go to "Object Settings" and find the Account object.
- Edit the permissions for the Account object in the Permission Set.
- Grant the "Delete" permission to the user you want to allow to delete records. Leave it unchecked for the other user.

#### 3.Assign Permission Sets:

- Assign the newly created Permission Set with the "Delete" permission to the user you want to grant this access to.

#### 4.Remove Delete Access from Profile:

- Go to the profile assigned to both users.
- In the profile settings, remove the "Delete" permission for the Account object.

## Profile Creation:

Creating profiles and add to the existing user to grant the permission set.

The screenshot shows the Salesforce Setup interface for the 'Profiles' section. The left sidebar contains a search bar with 'profile' entered, and a list of navigation items including 'Users' and 'Profiles'. The main content area displays a table of existing profiles. The table has columns for 'Action', 'Profile Name', 'User License', and 'Custom'. The 'Demo Standard User Profile' is highlighted. Below the table, there are navigation links for 'Previous' and 'Next'.

Action	Profile Name	User License	Custom
<a href="#">Edit</a>   <a href="#">Clone</a>	Customer Community User	Customer Community	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Customer Portal Manager Custom	Customer Portal Manager Custom	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Customer Portal Manager Standard	Customer Portal Manager Standard	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del</a>   ...	Demo Standard User Profile	Salesforce	<input checked="" type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del</a>   ...	Employee Profile	Salesforce	<input checked="" type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	External Apps Login User	External Apps Login	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	External Identity User	External Identity	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Force.com - App Subscription User	Force.com - App Subscription	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Force.com - Free User	Force.com - Free	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Gold Partner User	Gold Partner	<input type="checkbox"/>

The screenshot shows the 'Demo Standard User Profile' detail page in Salesforce Setup. The page includes a 'Profile Detail' section with fields for 'Name', 'User License', 'Description', and 'Created By'. Below this is a 'Page Layouts' section with a table of assigned layouts. The 'Global' layout is assigned to 'Global Layout', and the 'Object Milestone' layout is assigned to 'Object Milestone Layout'. The 'Email Application' is set to 'Not Assigned', and the 'Operating Hours' are set to 'Operating Hours Layout'.

Standard Object Layouts	Global	Object Milestone	Email Application	Operating Hours
	Global Layout <a href="#">View Assignment</a>	Object Milestone Layout <a href="#">View Assignment</a>	Not Assigned <a href="#">View Assignment</a>	Operating Hours Layout <a href="#">View Assignment</a>

Profiles | Salesforce

knowledgeinstituteoftechn55-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j000000exn4%3Fsetupid%3DENh...

Search Setup

SetupHomeObject Manager

profile

UsersProfiles

Didn't find what you're looking for? Try using Global Search.

SETUP

Profiles

Profile

Employee Profile

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 Access | 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 Custom Settings/Definitions Access | Enabled Flow Access | Enabled Service Presence Status Access | Enabled Custom Permissions

Profile Detail

EditCloneDeleteView Users

Name	Employee Profile
User License	Salesforce
Description	Custom Profile
Created By	VIGNAYA G S
Created	02/10/2023, 3:21 pm
Modified By	VIGNAYA G S
Modified	02/10/2023, 3:21 pm

Page Layouts

Standard Object Layouts	Global	Global Layout	Object Milestone	Object Milestone Layout
		[View Assignment]		[View Assignment]
Email Application	Not Assigned		Operating Hours	Operating Hours Layout
	[View Assignment]			[View Assignment]
Home Page Layout	Default		Opportunity	Opportunity Layout

Search

ENG IN

15:23

02-10-2023

Profiles | Salesforce

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Search Setup

SetupHomeObject Manager

profile

UsersProfiles

Didn't find what you're looking for? Try using Global Search.

SETUP

Profiles

The permissions defined here control access at the object level. Access to individual records within that object type is controlled by the sharing model. Set access levels based on the functional requirements for the profile. For example, create different groups of permissions for individual contributors, managers, and administrators. [How do I choose?](#)

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Accounts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AI Insight Reasons	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AI Record Insights	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Alternative Payment Methods	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
API Anomaly Event Stores	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
App Analytics Query Requests	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Application Usage Assignments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Appointment Categories	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Appointment Invitations	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Appointment Schedule Aggregates	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Legal Entities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Locations	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Location Groups	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Location Group Assignments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Macros	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Messaging Sessions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Messaging Users	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Operating Hours	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Opportunities	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Orders	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Search

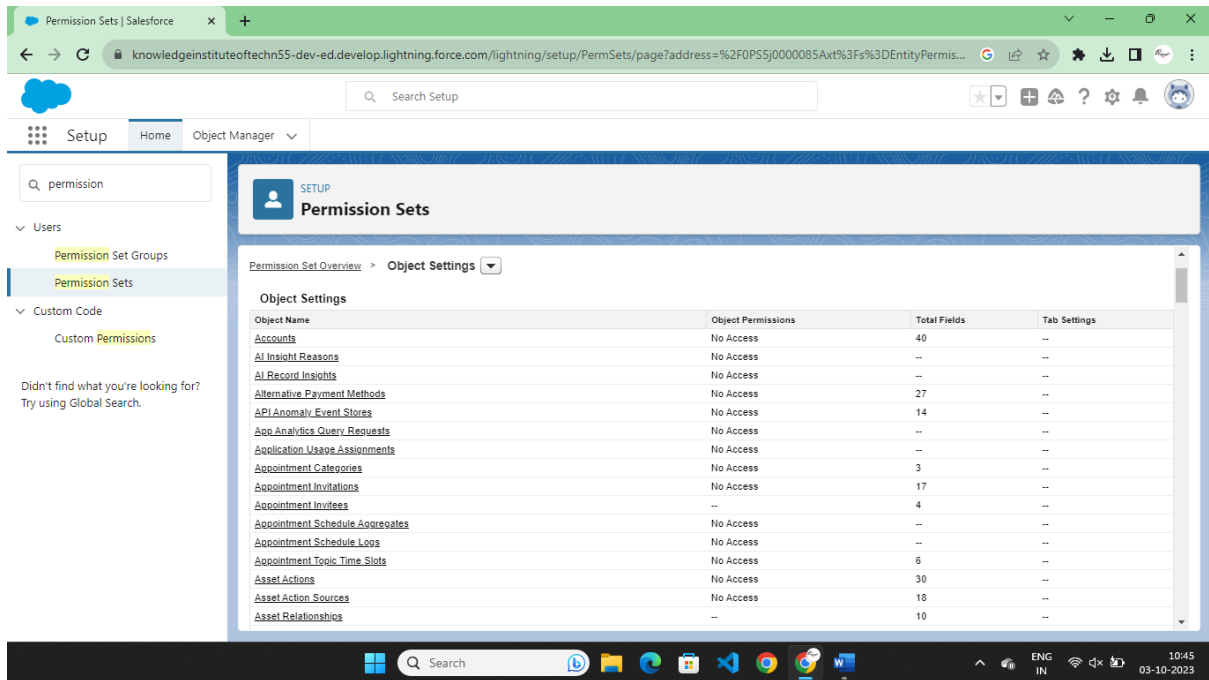
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02-10-2023

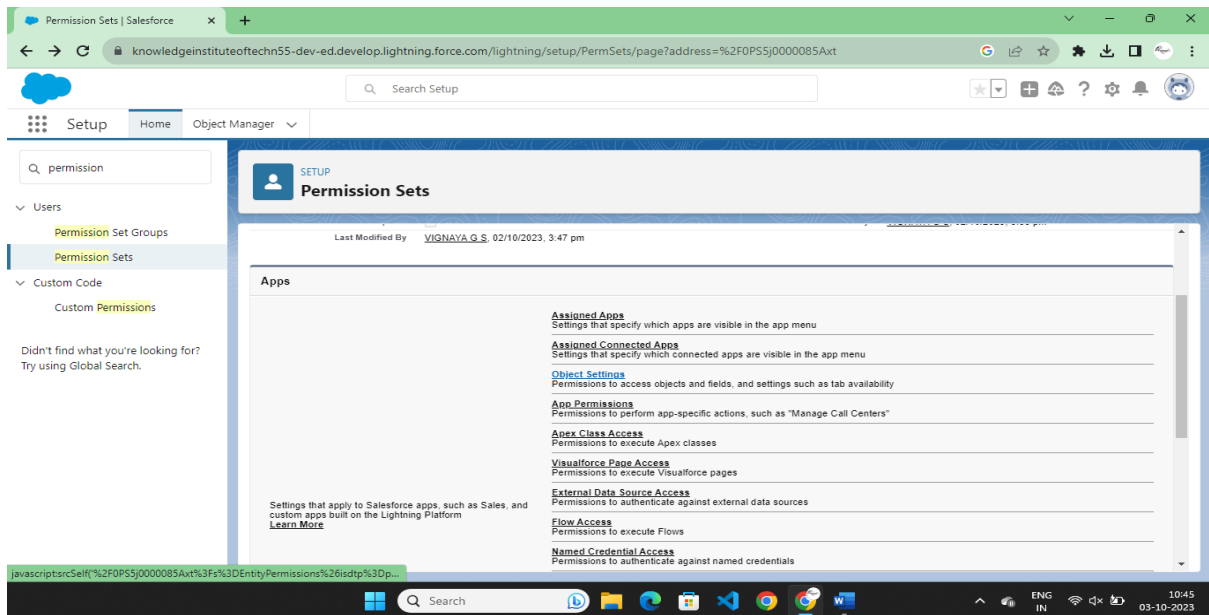


## Permission Sets:



This screenshot shows the 'Object Settings' tab within the Salesforce 'Permission Sets' setup page. The left sidebar contains navigation links for 'Users', 'Permission Set Groups', 'Permission Sets', and 'Custom Code'. The main content area displays a table of object settings for a specific permission set.

Object Name	Object Permissions	Total Fields	Tab Settings
Accounts	No Access	40	--
AI Insight Reasons	No Access	--	--
AI Record Insights	No Access	--	--
Alternative Payment Methods	No Access	27	--
API Anomaly Event Stores	No Access	14	--
App Analytics Query Requests	No Access	--	--
Application Usage Assignments	No Access	--	--
Appointment Categories	No Access	3	--
Appointment Invitations	No Access	17	--
Appointment Invitees	--	4	--
Appointment Schedule Aggregates	No Access	--	--
Appointment Schedule Logs	No Access	--	--
Appointment Topic Time Slots	No Access	6	--
Asset Actions	No Access	30	--
Asset Action Sources	No Access	18	--
Asset Relationships	--	10	--



This screenshot shows the 'Apps' tab within the Salesforce 'Permission Sets' setup page. The left sidebar is identical to the previous screenshot. The main content area displays a list of app-related settings for a specific permission set.

Last Modified By: [VIGNAYA G S](#), 02/10/2023, 3:47 pm

**Apps**

- Assigned Apps**  
Settings that specify which apps are visible in the app menu
- Assigned Connected Apps**  
Settings that specify which connected apps are visible in the app menu
- Object Settings**  
Permissions to access objects and fields, and settings such as tab availability
- App Permissions**  
Permissions to perform app-specific actions, such as "Manage Call Centers"
- Apex Class Access**  
Permissions to execute Apex classes
- Visualforce Page Access**  
Permissions to execute Visualforce pages
- External Data Source Access**  
Permissions to authenticate against external data sources
- Flow Access**  
Permissions to execute Flows
- Named Credential Access**  
Permissions to authenticate against named credentials

Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform  
[Learn More](#)

Permission Name Enabled

Read	<input checked="" type="checkbox"/>
Create	<input 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
Address	<input type="checkbox"/>	<input type="checkbox"/>
Age	<input type="checkbox"/>	<input type="checkbox"/>
Created By	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Department Detail	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Gender	<input type="checkbox"/>	<input type="checkbox"/>
Last Modified By	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Phone Number	<input type="checkbox"/>	<input type="checkbox"/>
Student Email	<input type="checkbox"/>	<input type="checkbox"/>
Student ID	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Available Visible

☐ ☐

Object Permissions

Permission Name	Enabled
Read	<input checked="" 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
Address	<input type="checkbox"/>	<input type="checkbox"/>
Age	<input type="checkbox"/>	<input type="checkbox"/>
Created By	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Department Detail	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Gender	<input type="checkbox"/>	<input type="checkbox"/>

By following these steps, you have effectively granted delete access to one user while keeping it restricted for the other user. The user with the Permission Set will be able to delete Account records, while the user without the Permission Set will only have Create, Read, and Edit access but won't have the ability to delete records.

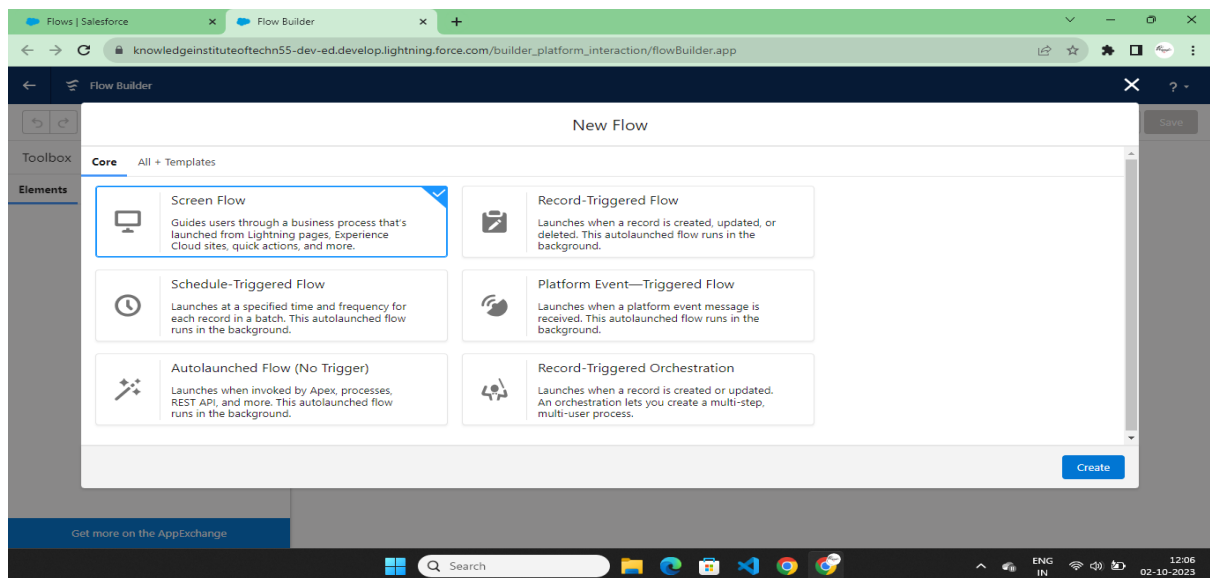
## 4. Create a screen flow for a basic survey to fill in the details for any form.

### Step 1: Access Salesforce Setup

1. Log in to your Salesforce account.
2. Click on your profile picture or the gear icon in the upper-right corner.
3. Select "Setup" from the dropdown menu.

### Step 2: Create a Flow

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



### Step 3: Add Screen Elements

1. Drag and drop a "Screen" element onto the canvas. This will be the starting point of your flow.
2. Click on the screen element to configure it.
3. Add text and instructions on this screen to inform users about the survey and what information is required.
4. Drag and drop the appropriate input elements (e.g., text fields, radio buttons, checkboxes) onto the screen for users to input their survey details. You can find these elements in the palette on the left.
5. Configure each input element with the appropriate labels, help text, and validation rules if necessary.

Flows | Salesforce

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

Setup Home Object Manager

flows

Process Automation

Flows

Identity

Login Flows

Didn't find what you're looking for? Try using Global Search.

SETUP Flows

Flow Trigger Explorer New Flow

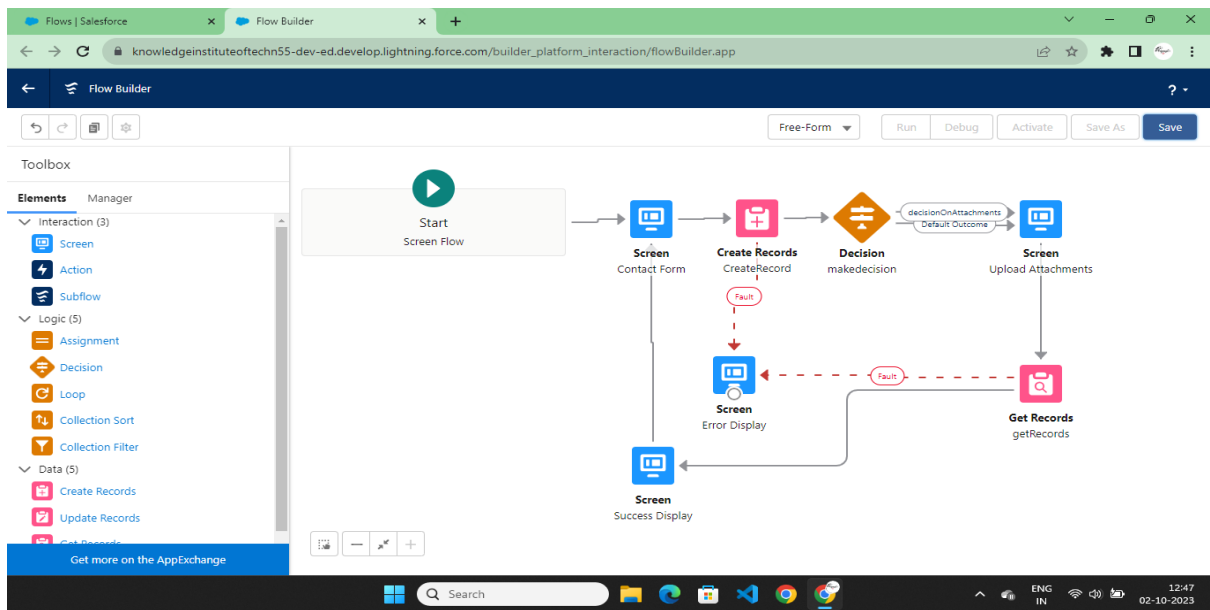
Flow Definitions

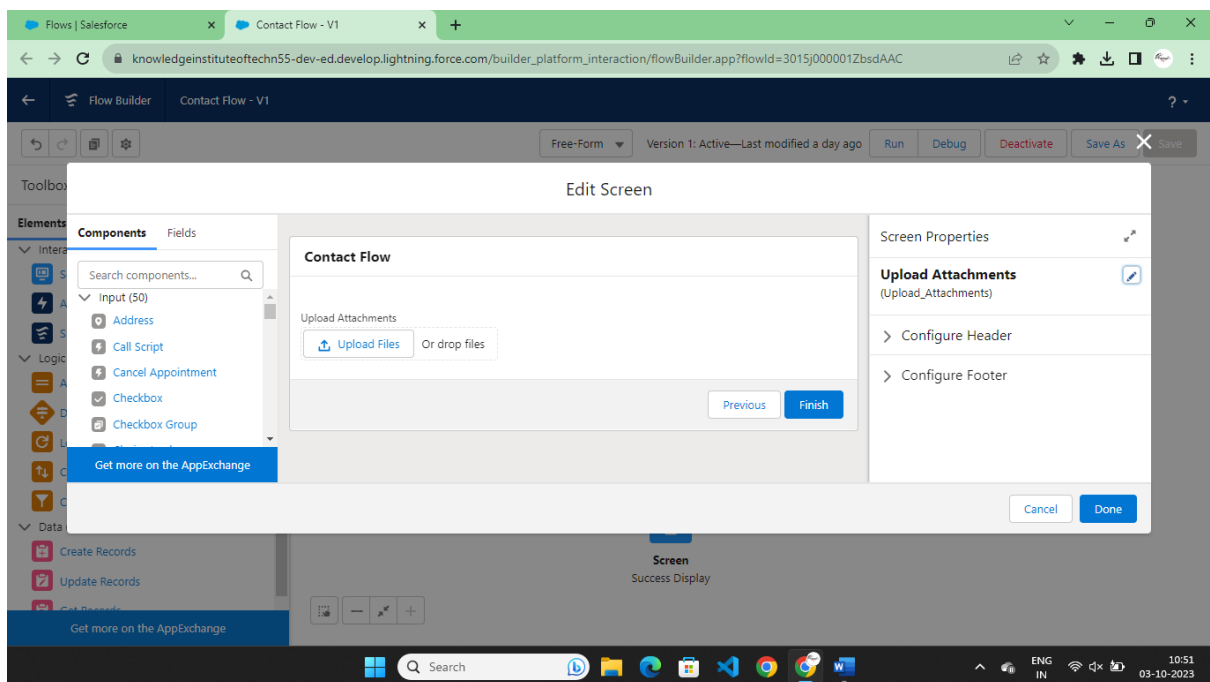
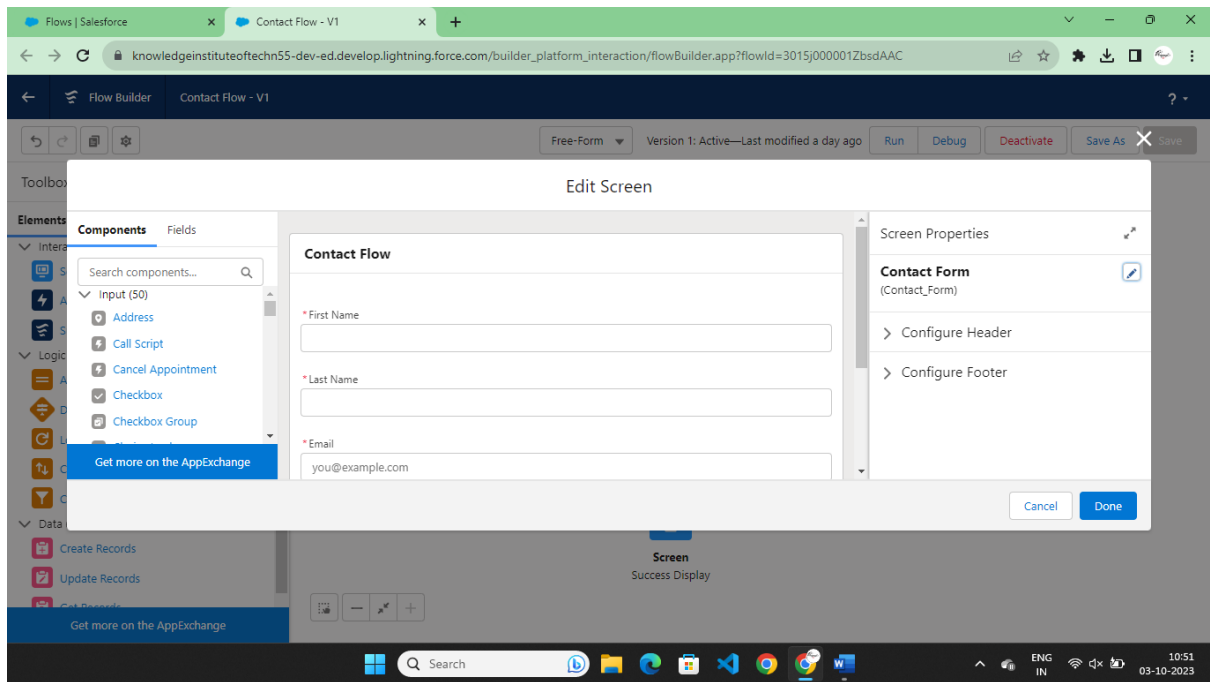
All Flows

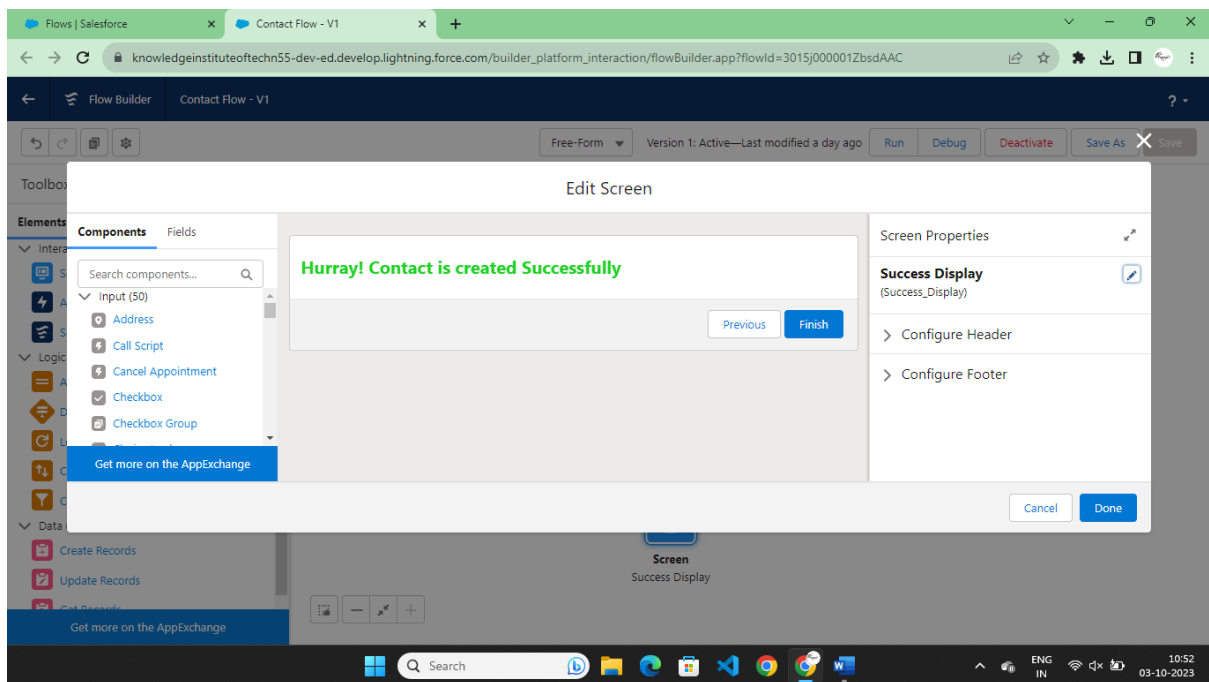
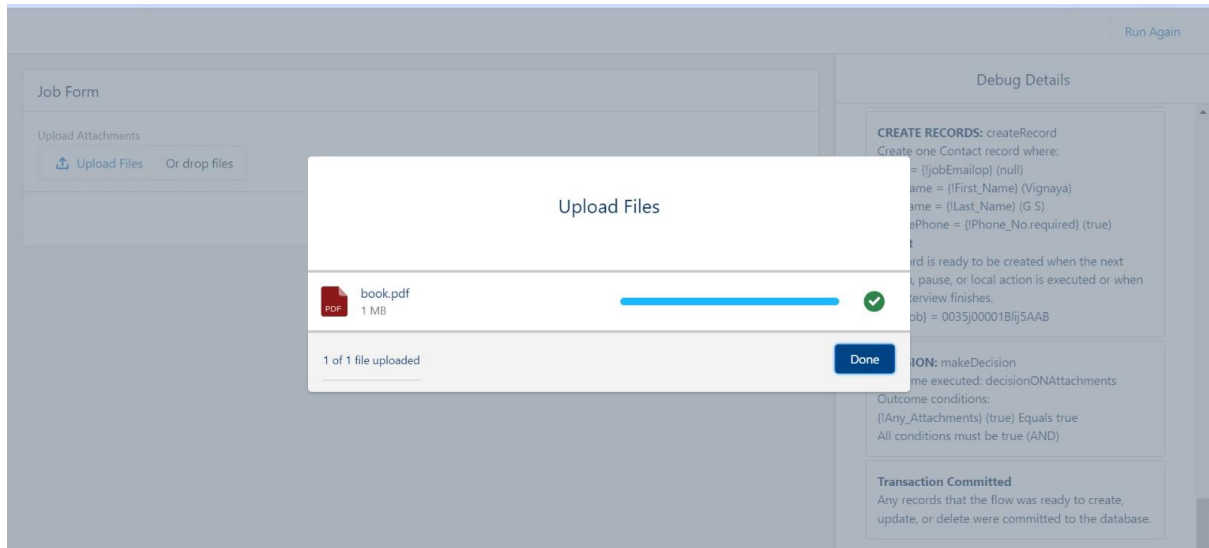
35 items • Sorted by Flow Label • Filtered by All flow definitions • Updated a few seconds ago

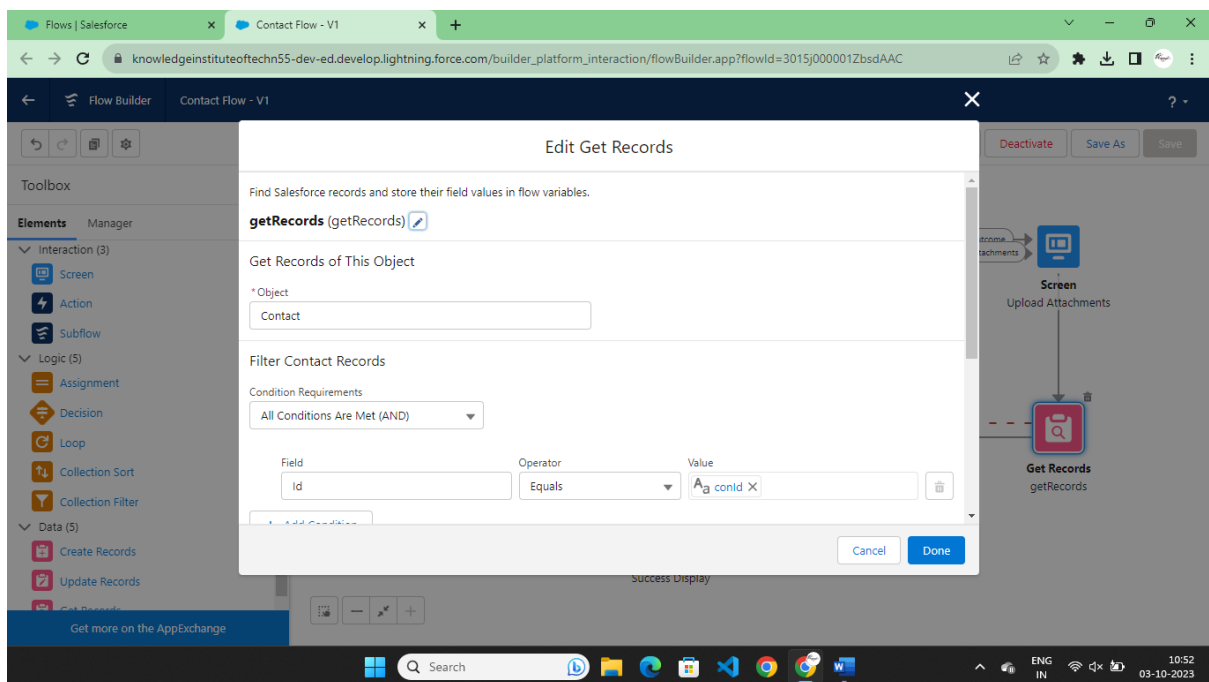
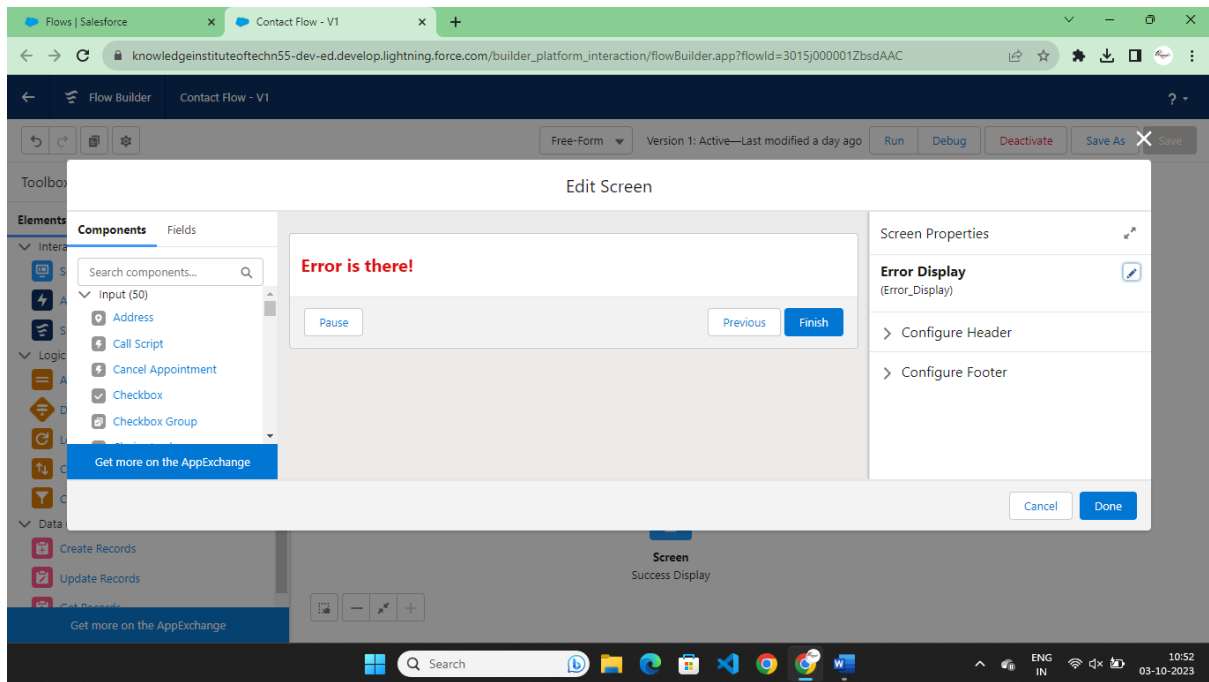
Flow Label	Process Type	A...	Te...	Package State	P...	Last M...	Last Modified
CMS: Withdraw Review Request	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Contact Flow	Screen Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Unmanaged		VIGNAYA G...	02/10/2023, 12:54 pm
Create a Case	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Create Order Summary Flow	Autolaunched Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Create Process Exception Flow	Autolaunched Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Create Waitlist	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Discount Flow	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Even Exchange Flow	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Find Contact Associated with Messaging Se...	Individual-Object Linking Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Generate Appointment Invitation	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			

10:51 03-10-2023



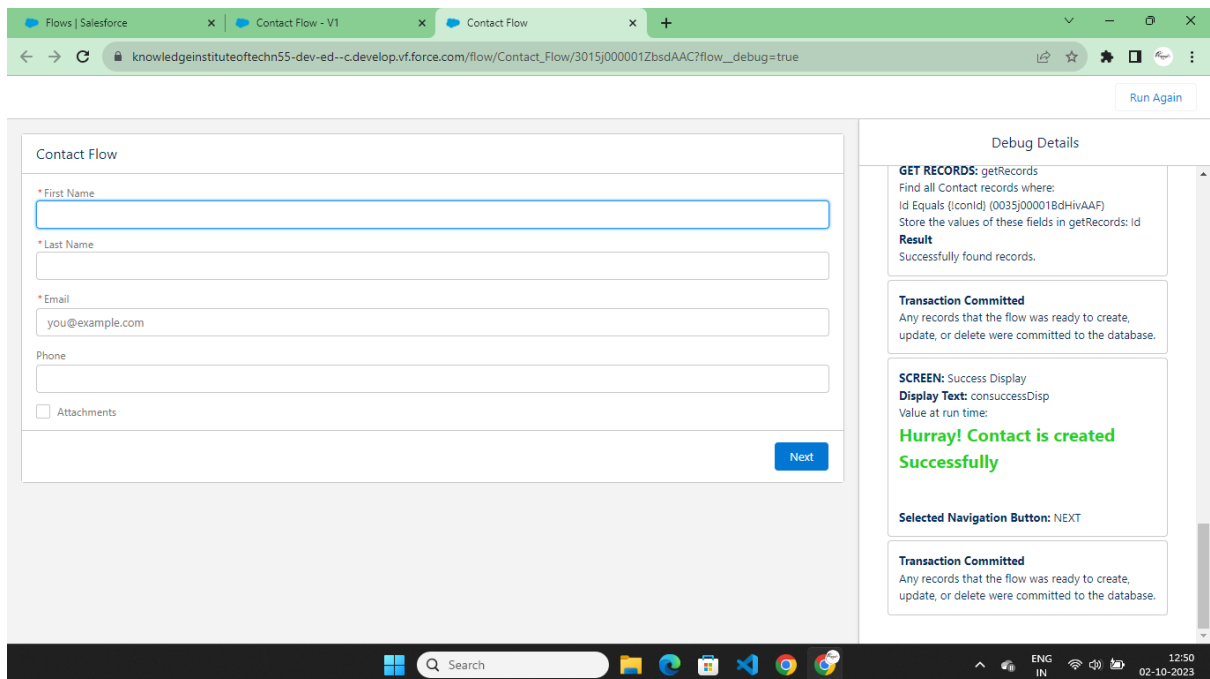
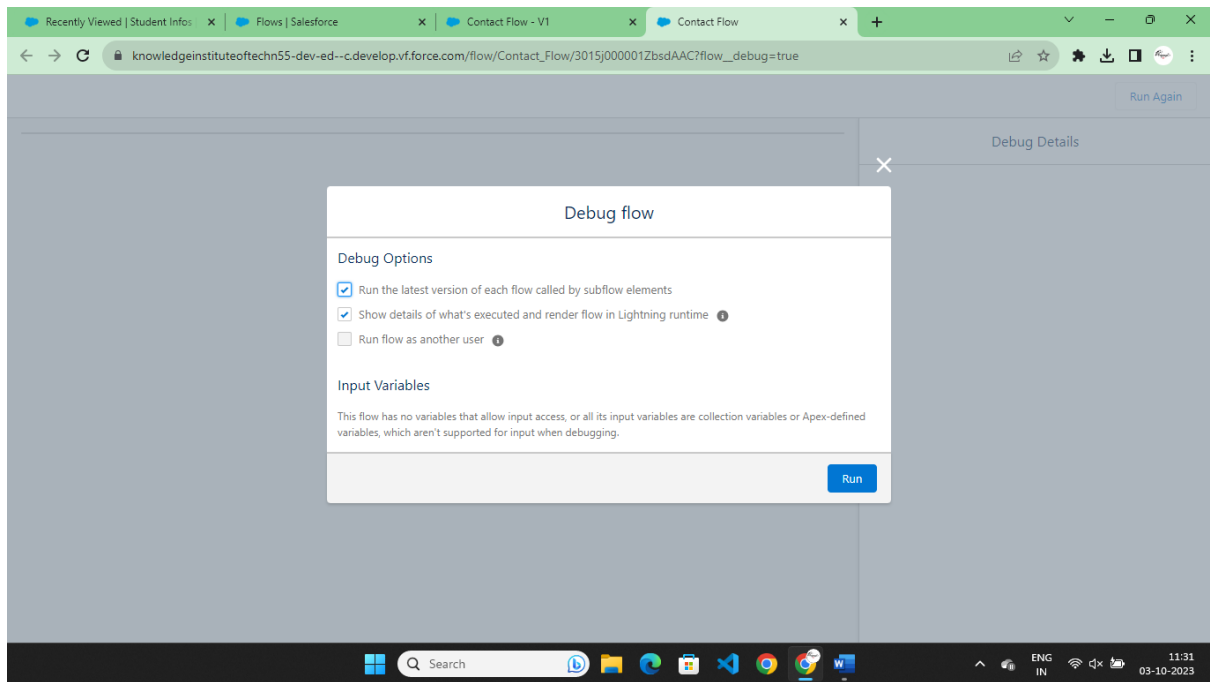




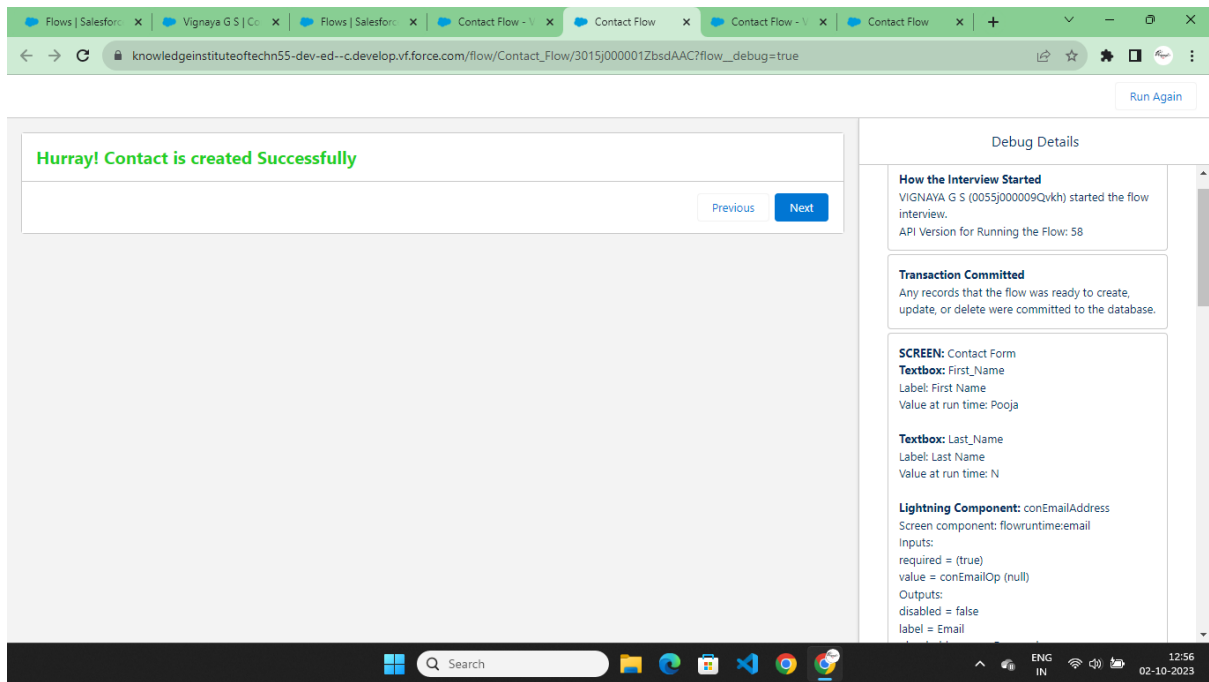


## Step 4: Create Variables

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







### Step 7: Create a Finish Screen

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

### Step 8: Connect the Screens

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

### Step 9: Set the Flow Properties

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

### Step 10: Activate the Flow

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