

NAAN MUDHALVAN
Salesforce Developer(Course)
Assignment no 1

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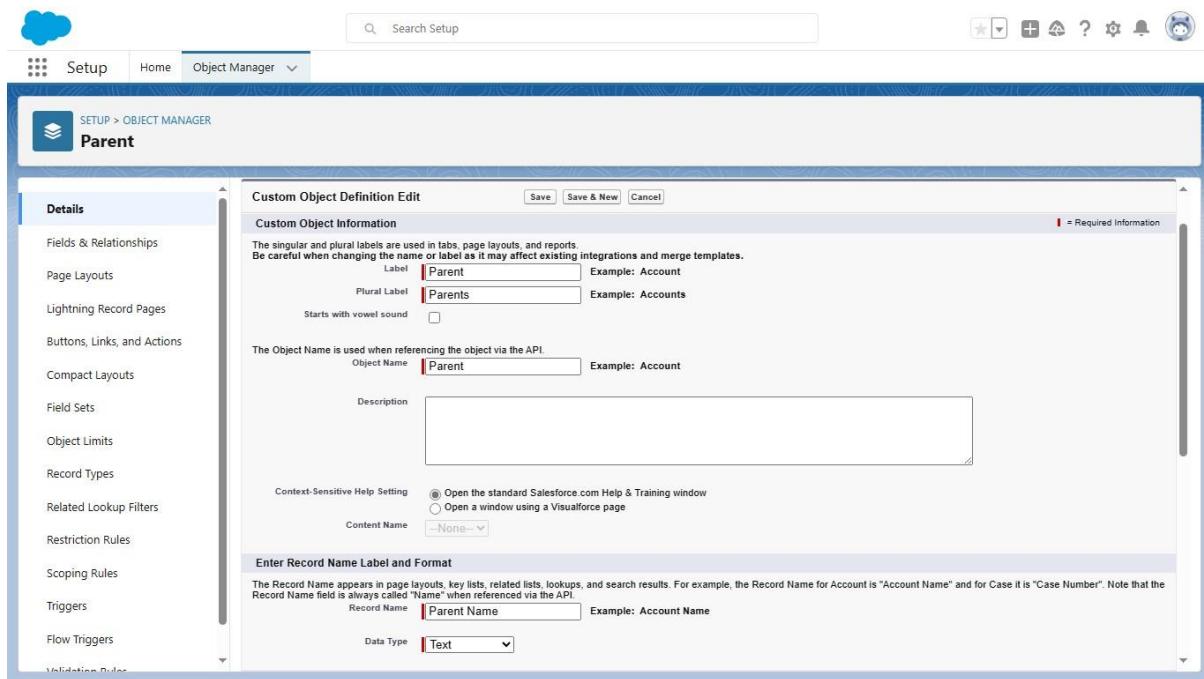
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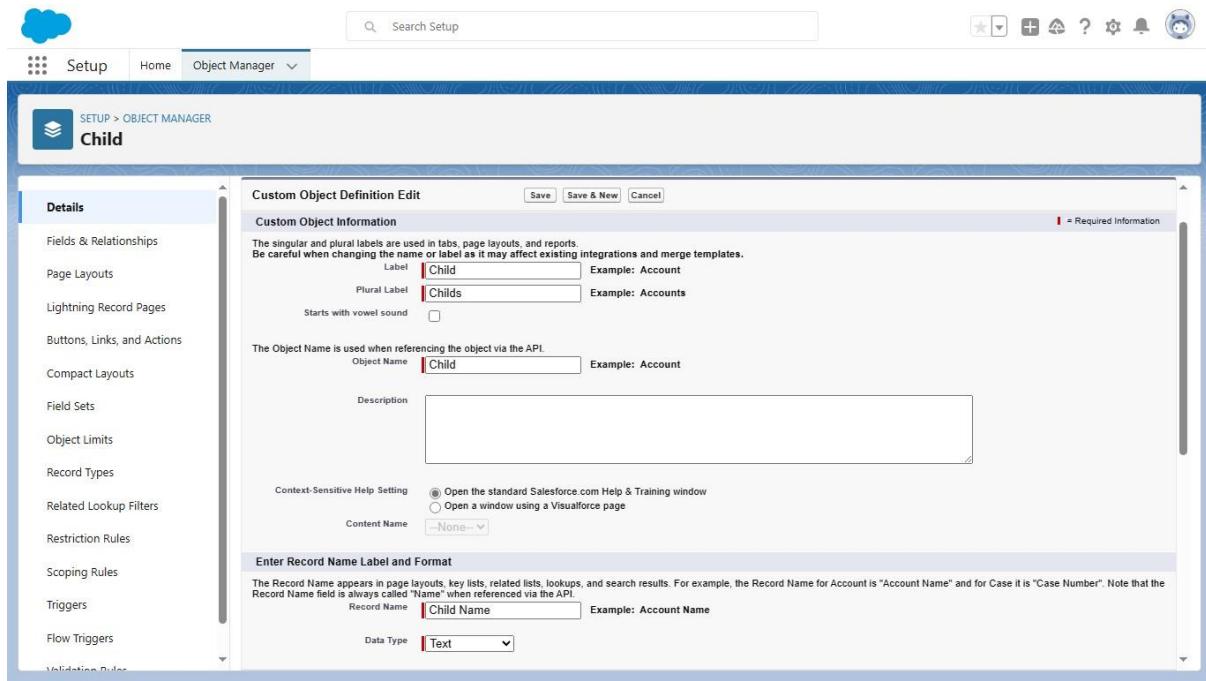
Batch : 2024

Zone no : Zone 8

1. Creating a Master-Detail Relationship between two custom objects and setting up a Roll-Up Summary Field to calculate the total number of records in the child object is a common task in Salesforce. Below are the steps to achieve this:

Step 1: Create Custom Objects.





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.**

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes a cloud icon, 'Setup', 'Home', and 'Object Manager'. A search bar says 'Search Setup' and a toolbar has icons for star, plus, question mark, etc. The main area is titled 'SETUP > OBJECT MANAGER Parent'. On the left, a sidebar lists 'Fields & Relationships' and other setup categories like Page Layouts, Lightning Record Pages, etc. The right pane is titled 'Fields & Relationships' with a sub-header '4 Items, Sorted by Field Label'. It contains a table with columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The table rows are:

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

This screenshot shows the 'New Custom Field' wizard for the Parent object. The top navigation bar and sidebar are identical to the previous screenshot. The main area is titled 'Parent New Custom Field' and 'Step 1. Choose the field type'. It says 'Specify the type of information that the custom field will contain.' A 'Data Type' section lists several options: 'None Selected' (selected), 'Auto Number', 'Formula', 'Roll-Up Summary', 'Lookup Relationship', 'Master-Detail Relationship' (selected), and 'External Lookup Relationship'. Each option has a detailed description below it. Buttons for 'Next' and 'Cancel' are at the bottom right.

Setup Home Object Manager

SETUP > OBJECT MANAGER Parent

Details Fields & Relationships Page Layouts Lightning Record Pages Buttons, Links, and Actions Compact Layouts Field Sets Object Limits Record Types Related Lookup Filters Restriction Rules Scoping Rules Triggers Flow Triggers Validation Rules

New Relationship Step 2. Choose the related object Step 2 of 6

Select the other object to which this object is related.

Related To Child

Help for this Page

Setup Home Object Manager

SETUP > OBJECT MANAGER Child

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

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

The screenshot shows the Salesforce Setup interface with the following details:

- Header:** Search Setup, Setup, Home, Object Manager.
- Breadcrumb:** SETUP > OBJECT MANAGER > Child
- Left Sidebar:** Details, Fields & Relationships (selected), 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.
- Main Content:** Step 1. Choose the field type. The "Data Type" section is displayed, showing the "Roll-Up Summary" option selected. Other options include "None Selected", "Auto Number", "Formula", "Lookup Relationship", "Master-Detail Relationship", and "External Lookup Relationship". Each option has a detailed description below it.

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.**

The screenshot shows the Salesforce Setup interface with the 'Tabs' page selected. The left sidebar has sections for 'User Interface' (Loaded Console Tab Limit, Rename Tabs and Labels) and 'Tabs'. A message at the top says 'Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'Tabs' and contains four sections: 'Custom Object Tabs', 'Web Tabs', 'Visualforce Tabs', and 'Lightning Component Tabs'. Under 'Custom Object Tabs', there is a table:

Action	Label	Tab Style	Description
Edit Del	Brokers	People	
Edit Del	Childs	Lightning	
Edit Del	Parents	Lightning	
Edit Del	Properties	Real Estate Sign	

Below this table are three empty sections: 'Web Tabs', 'Visualforce Tabs', and 'Lightning Component Tabs', each with a 'New' and 'What Is This?' link.

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.

The screenshot shows the 'Lightning Experience App Manager' page. The left sidebar has a search bar and navigation links for Setup, Home, Object Manager, and various Salesforce mobile and desktop apps. The main content area displays a table titled 'Lightning Experience App Manager' with 22 items. The columns are: App Name, Developer Name, Description, Last Modified, Type, and Visibility. The table lists standard Salesforce apps like All Tabs, Analytics Studio, App Launcher, etc.

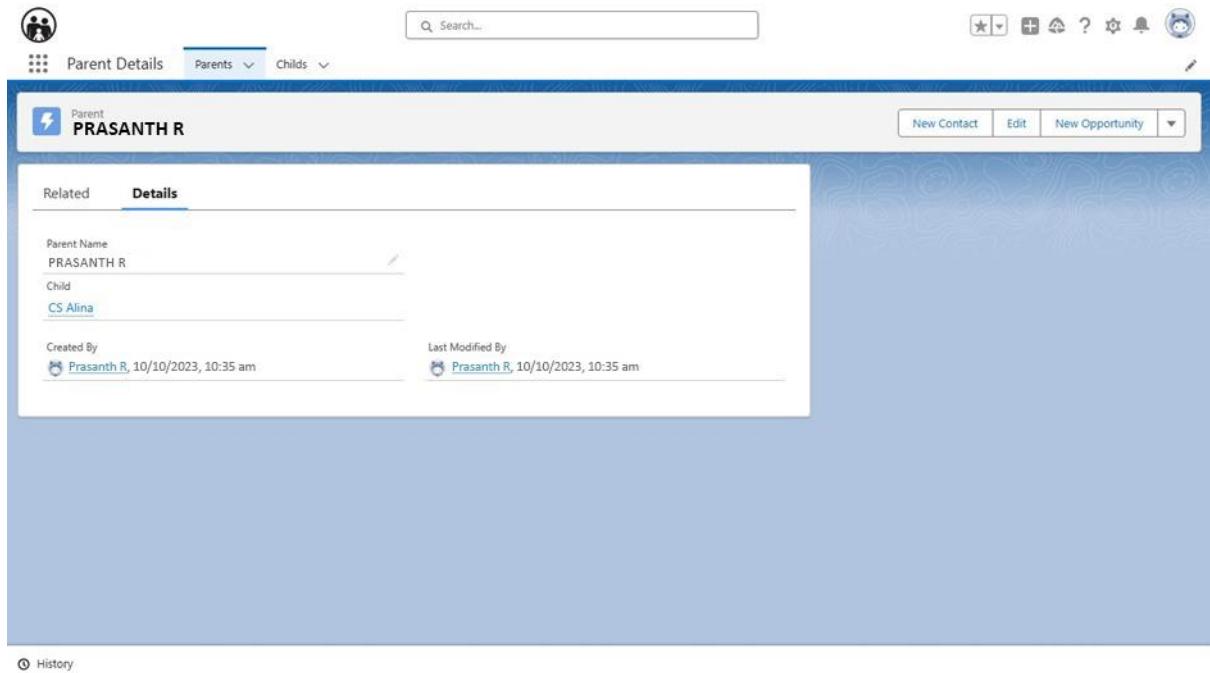
The screenshot shows the 'New Lightning App' configuration page. It includes sections for 'App Details' (App Name: Parent Details, Developer Name: Prasanth R, Description: Enter a description...) and 'App Branding' (Image upload, Primary Color Hex: #0070D2). There's also an 'Org Theme Options' checkbox and an 'App Launcher Preview' section. A 'Next' button is visible at the bottom right. The background shows a list of existing apps.

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

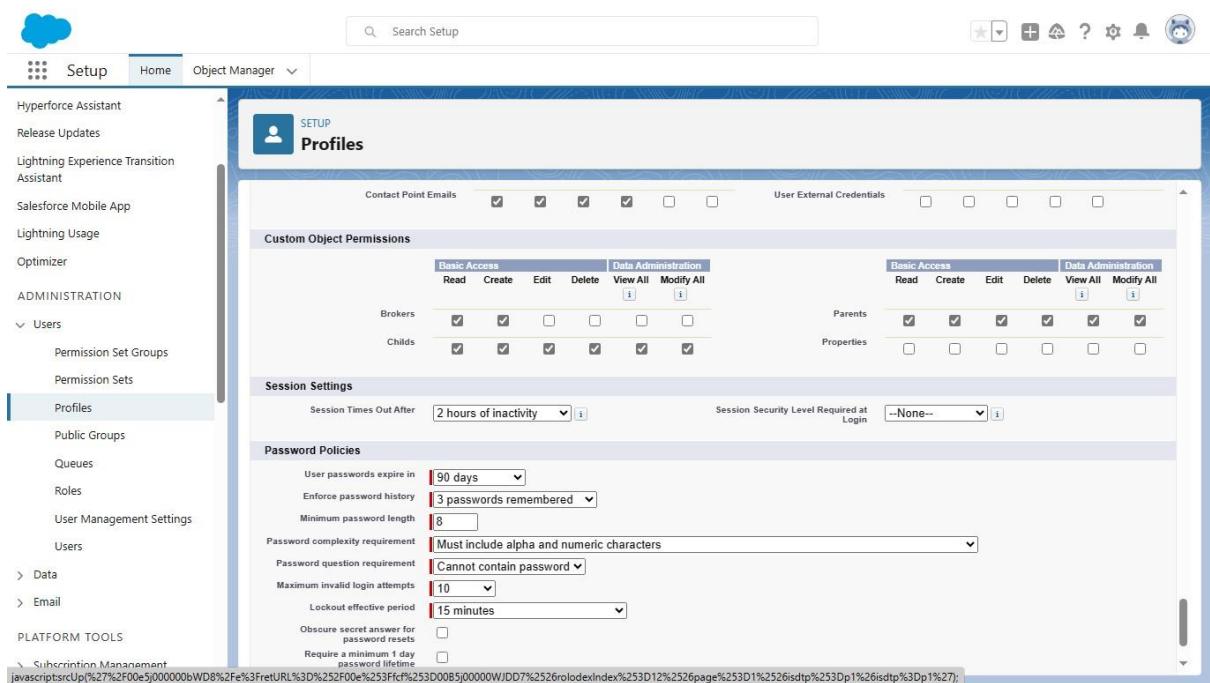
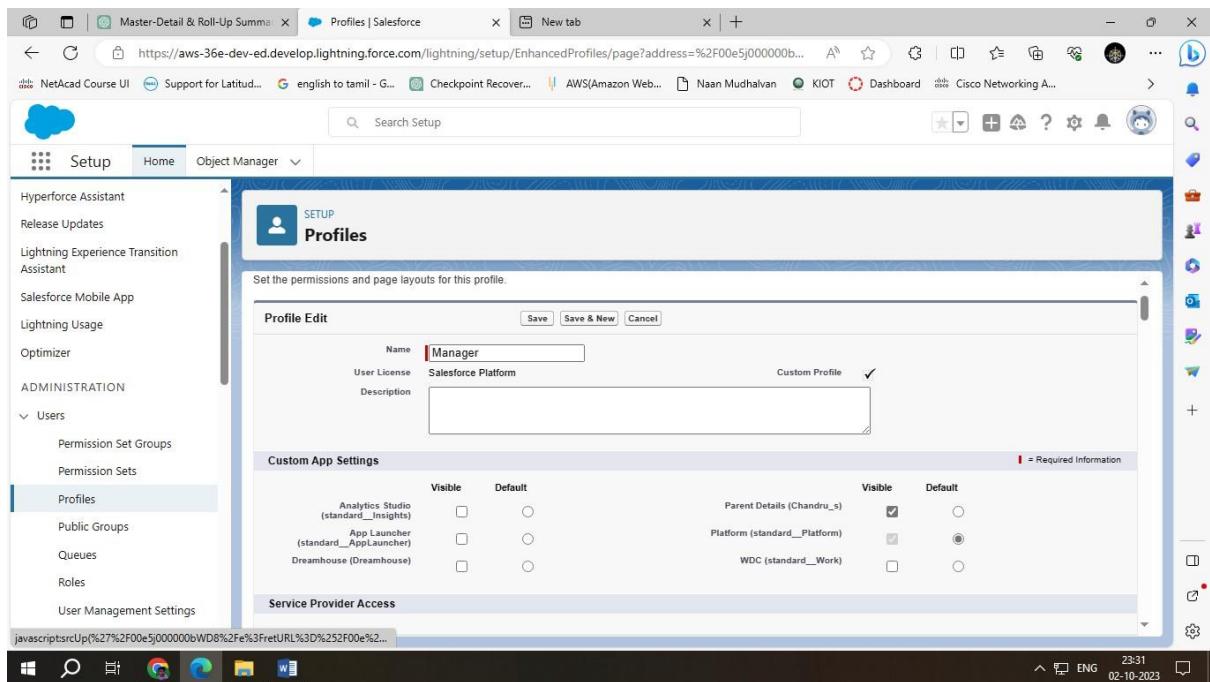
Field to calculate the total number of records in the Child object.



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.

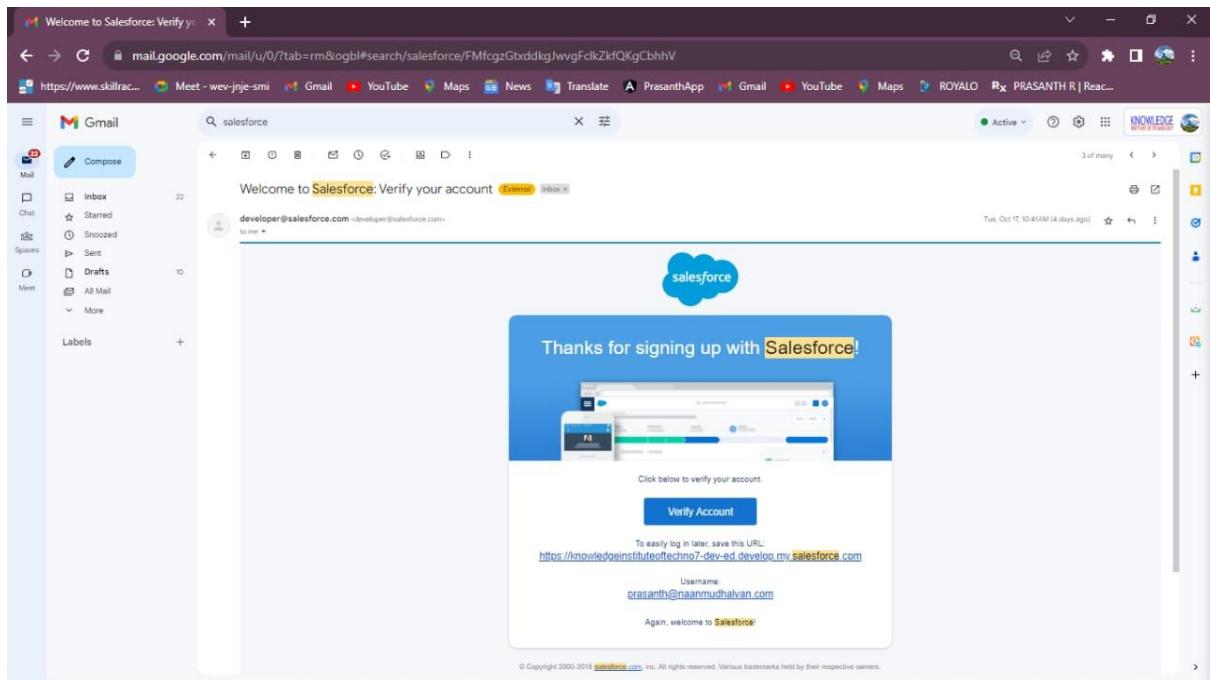
2. In the Quick Find box, type "Sharing Rules" and select "Sharing Settings."

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 shows the "Change Your Password" page for Salesforce. At the top, there's a "salesforce" logo and the heading "Change Your Password". Below that, a note says: "Enter a new password for 2k20cbs29@kiot.ac.in. Make sure to include at least:" followed by a list of requirements: "8 characters", "1 letter", and "1 number". There are two input fields: "New Password" and "Confirm New Password", both containing ".....". To the right of the "New Password" field is the word "Good" and to the right of the "Confirm New Password" field is the word "Match". Below these fields is a note: "Caps Lock is on." Under "Security Question", there's a dropdown menu set to "In what city were you born?" and an input field containing "SALEM". At the bottom is a large blue "Change Password" button.

Profile Edit

Bmanager

Name: Bmanager
User License: Salesforce Platform
Description:

Custom App Settings

	Visible	Default		Visible	Default
Analytics Studio (standard_Insights)	<input type="checkbox"/>	<input checked="" type="radio"/>	Parent Details (Chandru_s)	<input checked="" type="checkbox"/>	<input type="radio"/>
App Launcher (standard_AppLauncher)	<input type="checkbox"/>	<input checked="" type="radio"/>	Platform (standard_Platform)	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>
Dreamhouse (Dreamhouse)	<input type="checkbox"/>	<input checked="" type="radio"/>	WDC (standard_Work)	<input type="checkbox"/>	<input type="radio"/>

Service Provider Access

Tab Settings

Overwrite users' personal tab customizations

Standard Tab Settings: Home | Default On

Custom Object Permissions

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

For User B:

- Follow the same steps as above but create a separate sharing rule for User B.
- 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' tab selected in the sidebar. The main window displays the 'User Edit' form for creating a new user named 'Sanjay'. The 'General Information' section includes fields for First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, and Division. The 'Role' field is set to '<None Specified>'. The 'User License' is 'Salesforce Platform'. The 'Profile' is 'Bmanager'. The 'Active' checkbox is checked. Other optional checkboxes like Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, and Data.com User Type are available but not selected. The 'Data.com Monthly Addition Limit' is set to 'Default Limit (300)'. Accessibility Mode (Classic or Dark), High-Contrast Palette on Charts, and Load Lightning Pages While are also shown.

Step 3: Assign Records Ownership

The screenshot shows the Salesforce Setup interface with the 'Permission Sets' tab selected in the sidebar. The main window displays the 'Permission Set Create' form. It requires entering 'Label' (set to 'permission') and 'API Name' (set to 'permission'). A 'Description' field is present but empty. The 'Session Activation Required' checkbox is unchecked. The 'Select the type of users who will use this permission set' section contains instructions: 'Who will use this permission set?' followed by three options: '-Choose - None-' (selected), '-Choose a specific user license if you want users with only one license type to use this permission set.', and '-Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.' Below this, a note says 'Not sure what a permission set license is? Learn more here.' and a 'License' dropdown is set to '-None-'.

The screenshot shows the Salesforce Setup interface with the following details:

- Left Navigation Bar:** Includes links for Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, ADMINISTRATION (with sub-links for Users, Permission Set Groups, and Permission Sets), Data, Email, and PLATFORM TOOLS.
- Current Page:** Permission Sets
- Content Area:** Displays the "Object Settings" section for the "permission" object. It includes a table with columns: Object Name, Object Permissions, Total Fields, and Tab Settings. The table lists various objects like Accounts, AI Insight Reasons, Alternative Payment Methods, etc., with their respective permission levels and field counts.

The screenshot shows the Salesforce Setup interface with the following details:

- Left Navigation Bar:** Same as the first screenshot, showing the Permission Sets link is selected.
- Current Page:** Permission Sets
- Content Area:** Displays the "Childs" tab settings. It includes a "Tab Settings" table with columns Available and Visible, and a "Object Permissions" table with columns Permission Name and Enabled. The "Object Permissions" table shows checkboxes for Read, Create, Edit, Delete, View All, and Modify All, all of which are checked.

Setup Home Object Manager

PERMISSION SET PERMISSION > MANAGE ASSIGNMENT EXPIRATION

permission

Select Users to Assign

All Users

1 item selected

Full Name	Role	Username	Profile
Prasanth R	CS	au611220244029@naanmudhalvan.com	System Administrator
Chatter Expert	Chatter	chatty.00d5j00000cismqean.eodfzkibsr@chatter.salesforce.com	Chatter Free User
Integration User	integ	integration@00d5j00000cismqean.com	Analytics Cloud Integration User
Sanjay R	sp	2k22cse171@kiot.ac.in	Bmanager
Security User	sec	insightsecurity@00d5j00000cismqean.com	Analytics Cloud Security User
Sunil A	sa	2k21cse176@kiot.ac.in	Manager

Cancel Next

Subscription Management aws-36e-dev-ed.lightning.force.com/lightning/r/0035j000009Zv6qAAC/vi...

Setup Home Object Manager

PERMISSION SET PERMISSION > MANAGE ASSIGNMENT EXPIRATION

permission

Select an Expiration Option For Assigned Users

No expiration date

Specify the expiration date

Time Zone
Select a time zone...

Selected Users

Full Name	Role	Profile	Active	User License	Expires On
Sunil A	Manager	Salesforce Platform	Never Expires		

Cancel Back Assign

Subscription Management

The screenshot shows the Salesforce Setup interface. The left sidebar includes links for Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, Administration (with sub-links for Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and Users), Data, Email, and Platform Tools (Subscription Management). The main content area displays a success message: "1 assignments were successful." under the "permission" section. A table titled "Assignment Summary" lists one assignment: Sunil A (User License: Salesforce Platform, Status: Success). A "Done" button is at the bottom right.

The screenshot shows the Salesforce Setup interface. The left sidebar includes links for Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, Administration (with sub-links for Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and Users), Data, Email, and Platform Tools (Subscription Management). The main content area displays the "Permission Sets" page, listing various objects and their access levels (e.g., No Access, 26, 6, 14, 15, 33, 4, 18, 24, 30, 6, 1, 20, 41, etc.).

The screenshot shows the Salesforce Setup interface with the following details:

- Header:** Search Setup, Home, Object Manager.
- Left Sidebar:** Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, ADMINISTRATION (Users, Permission Set Groups, Permission Sets), Data, Email, PLATFORM TOOLS, Subscription Management.
- Current Page:** SETUP -> Permission Sets -> permission
- Content Area:**
 - Permission Set Overview:** Object Settings, Parents.
 - Parents:** Available, Visible.
 - Tab Settings:** Available, Visible.
 - Object Permissions:**

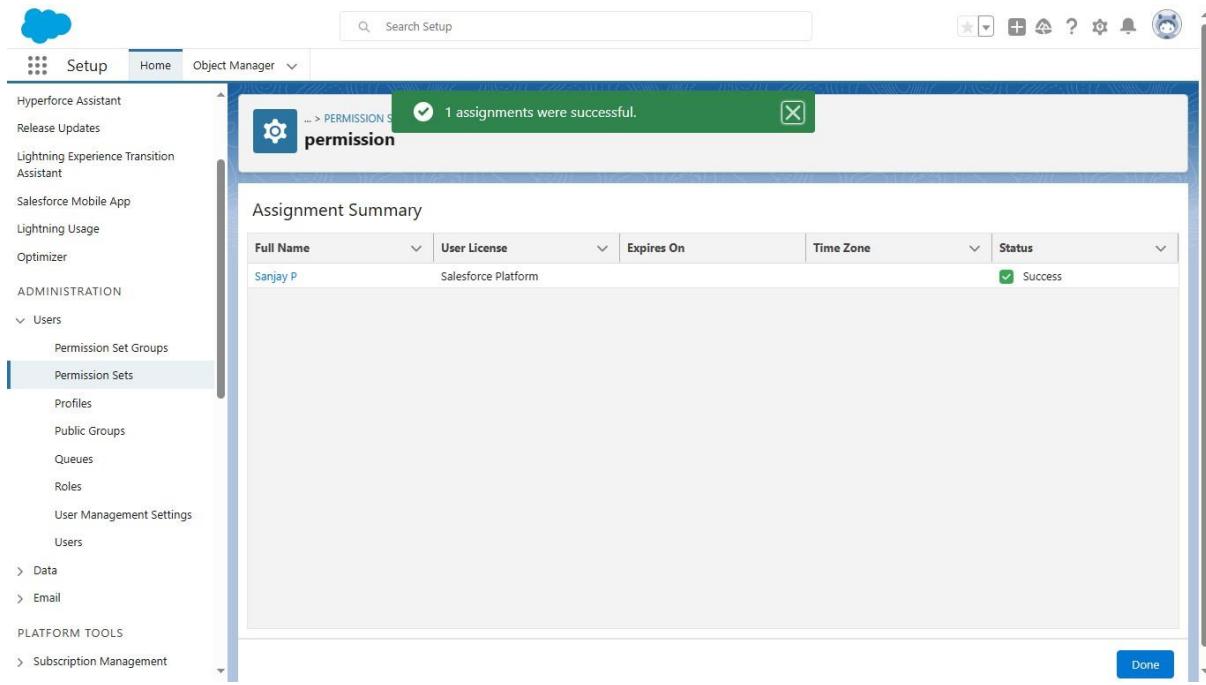
Permission Name	Enabled
Read	<input checked="" type="checkbox"/>
Create	<input checked="" type="checkbox"/>
Edit	<input type="checkbox"/>
Delete	<input type="checkbox"/>
View All	<input type="checkbox"/>
Modify All	<input type="checkbox"/>
 - Field Permissions:**

Field Name	Read Access	Edit Access
Child	<input type="checkbox"/>	<input type="checkbox"/>
Created By	<input checked="" type="checkbox"/>	<input type="checkbox"/>
- URL:** https://aws-36e-dev-ed.develop.my.salesforce.com/one/one.app#/alohaRedirect/0P55j000007Uxoi/e?s=EntityPermissions&o=015j000002rl5H&isdtp=p1

The screenshot shows the Salesforce Setup interface with the following details:

- Header:** Search Setup, Home, Object Manager.
- Left Sidebar:** Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, ADMINISTRATION (Users, Permission Set Groups, Permission Sets), Data, Email, PLATFORM TOOLS, Subscription Management.
- Current Page:** SETUP -> PERMISSION SET 'PERMISSION' -> MANAGE ASSIGNMENT EXPIRATION
- Content Area:**
 - Select Users to Assign:** All Users.
 - Table:** List of users with checkboxes for selection.

Full Name	Ali...	Username	Role	Ac...	Profile
Prasanth R	CS	au611220244029@naanmudhalvan.com	<input checked="" type="checkbox"/>	System Administrator	
Chatter Expert	Chatter	chatty.00d5j00000cismqean.eodfzikbsrf@chatter.salesforce.com	<input checked="" type="checkbox"/>	Chatter Free User	
Integration User	integ	integration@00d5j00000cismqean.com	<input checked="" type="checkbox"/>	Analytics Cloud Integration User	
Sanjay P	sp	2k22cse171@kiot.ac.in	<input checked="" type="checkbox"/>	Bmanager	
Security User	sec	insightssecurity@00d5j00000cismqean.com	<input checked="" type="checkbox"/>	Analytics Cloud Security User	
 - Buttons:** 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.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	A_Sumit	SA	2k21cse176@kiot.ac.in		<input checked="" type="checkbox"/>	Manager
<input type="checkbox"/>	Chatter Expert	Chatter	chatty_00d50000000csmoean.eodfzklbsrl@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	P.Sanjay	SR	2k22cse171@naanmudhalvan.com		<input checked="" type="checkbox"/>	BManager
<input type="checkbox"/>	Prasanth R	CS	au611220244029@naanmudhalvan.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	User_Integration	integ	integration@00d5000000csmoean.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	User_Security	ses	Insightsecurity@00d5000000csmoean.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

Action	Profile Name	User License	Custom
<input type="checkbox"/>	Analytics Cloud Integration User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/>	Analytics Cloud Security User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/>	Authenticated Website	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/>	Authenticated Website	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/>	Manager	Salesforce Platform	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Chatter External User	Chatter External	<input type="checkbox"/>
<input type="checkbox"/>	Chatter Free User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/>	Chatter Moderator User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/>	Contract Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/>	Cross_Org_Data_Proxy_User	XOrg Proxy User	<input type="checkbox"/>
<input type="checkbox"/>	Custom_Marketing_Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Custom_Sales_Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Custom_Support_Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Customer_Community_Login_User	Customer Community Login	<input type="checkbox"/>
<input type="checkbox"/>	Customer_Community_Plus_Login_User	Customer Community Plus Login	<input type="checkbox"/>
<input type="checkbox"/>	Customer_Community_Plus_User	Customer Community Plus	<input type="checkbox"/>

The screenshot shows the Salesforce Setup interface for cloning a profile. The left sidebar includes sections like Lightning Usage, Optimizer, Administration (Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, Users), Data, Email, Platform Tools (Subscription Management, Apps, Feature Settings, Slack, MuleSoft, Einstein), and Quick Find.

The main content area is titled "Clone Profile" under the "SETUP Profiles" header. It displays a form with the following fields:

- Existing Profile: Standard Platform User
- User License: Salesforce Platform
- Profile Name: Manager

Buttons at the bottom include "Save" and "Cancel". A help link "Help for this Page" is located in the top right corner.

The screenshot shows the Salesforce Setup interface for viewing the details of the 'chan' profile. The left sidebar includes sections like Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, Administration (Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings), and Quick Find.

The main content area is titled "Profile Detail" for the profile "chan". It shows the following details:

Name	chan	User License	Salesforce Platform	Description	Created By	Modified By
					Chandru S	03/10/2023, 1:50 pm

Below this, the "Page Layouts" section lists various layouts assigned to the profile:

Standard Object Layouts	Global	Operating Hours
Global	Global Layout [View Assignment]	Operating Hours Layout [View Assignment]
Email Application	Not Assigned [View Assignment]	Order [View Assignment]
Home Page Layout	Home Page Default [View Assignment]	Order Product [View Assignment]
Account	Account Layout [View Assignment]	Payment [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	Payment Authorization [View Assignment]
Appointment Invitation	Appointment Invitation Layout [View Assignment]	Payment Authorization Adjustment [View Assignment]
Asset	Asset Layout	Payment Gateway [View Assignment]

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Hyperforce Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

ADMINISTRATION

Users

- Permission Set Groups
- Permission Sets
- Profiles**
- Public Groups
- Queues
- Roles
- User Management Settings

Cloud

Search Setup

SETUP Profiles

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"/>
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

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Hyperforce Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

ADMINISTRATION

Users

- Permission Set Groups
- Permission Sets
- Profiles**
- Public Groups
- Queues
- Roles
- User Management Settings

Cloud

Search Setup

SETUP Profiles

Profile Edit chan

Help for this Page

Set the permissions and page layouts for this profile.

Profile Edit

Name: chan

User License: Salesforce Platform

Custom Profile:

Description:

Custom App Settings

	Visible	Default		Visible	Default
Analytics Studio (standard_Insights)	<input type="checkbox"/>	<input checked="" type="radio"/>	Parent Details (Chandru_s)	<input checked="" type="checkbox"/>	<input type="radio"/>
App Launcher (standard_AppLauncher)	<input type="checkbox"/>	<input checked="" type="radio"/>	Platform (standard_Platform)	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>
Dreamhouse (Dreamhouse)	<input type="checkbox"/>	<input checked="" type="radio"/>	WDC (standard_Work)	<input type="checkbox"/>	<input checked="" type="radio"/>

Service Provider Access

Tab Settings

Overwrite users' personal tab customizations

Standard Tab Settings

Home Default On Learning Default On

Screenshot of the Salesforce Lightning Experience showing the 'Users' page under 'ADMINISTRATION'.

The page displays a list of users with columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The users listed are:

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	A_Sunil	sa	2k20cse176@kiot.ac.in	<input checked="" type="checkbox"/> Manager	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	Chatter Expert	Chatter	chatty.00050000000usemcpean.eodfzki0sr@chatter.salesforce.com	<input checked="" type="checkbox"/> Chatter Free User	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	P_Sanjay	sr	2k20cse171@kiot.ac.in	<input checked="" type="checkbox"/> Manager	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	PraSanthR	CS	su611220244029@naanmudhalvan.com	<input checked="" type="checkbox"/> System Administrator	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	User_Integration	Integ	integration@00050000000usemcpean.com	<input checked="" type="checkbox"/> Analytics Cloud Integration User	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	User_Security	ses	insightssecurity@00d50000000usemcpean.com	<input checked="" type="checkbox"/> Analytics Cloud Security User	<input checked="" type="checkbox"/>	

Screenshot of the Salesforce Setup interface showing the 'New User' creation screen under 'ADMINISTRATION > Users'.

The 'User Edit' form contains the following information:

General Information	Role
First Name: Sunil	Role: <None Specified>
Last Name: A	User License: Salesforce Platform
Alias: sa	Profile: chan
Email: 2k20cse176@kiot.ac.in	Active: <input checked="" type="checkbox"/>
Username: 2k20cse176@kiot.ac.in	Marketing User: <input type="checkbox"/>
Nickname: User1696321490080232961	Offline User: <input type="checkbox"/>
Title: <input type="text"/>	Knowledge User: <input type="checkbox"/>
Company: Male	Flow User: <input type="checkbox"/>
Department: <input type="text"/>	Service Cloud User: <input type="checkbox"/>
Division: <input type="text"/>	Site.com Contributor User: <input type="checkbox"/>
	Site.com Publisher User: <input type="checkbox"/>
	WDC User: <input type="checkbox"/>
	Data.com User Type: <None>
	Data.com Monthly Additional Limit: Default Limit (300)
	Accessibility Mode (Classic Only): <input type="checkbox"/>
	High-Contrast Palette on Charts: <input type="checkbox"/>
	Load Lightning Pages While: <input type="checkbox"/>

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. The main content area displays the 'User Detail' page for a user named 'Sunil A'. The page includes fields for Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, Language, Delegated Approver, Manager, Receive Approval Request Emails, and various checkboxes for roles like Marketing User, Offline User, Knowledge User, etc. The 'Role' dropdown is set to '<None Specified>'. The 'User License' dropdown is set to 'Salesforce Platform'. The 'Profile' dropdown is set to 'chan'. The 'Active' checkbox is checked. The 'Last Log In' field shows 'Never'. The 'Last Activity' field shows 'Never'.

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. The main content area displays the 'User Edit' page for a user named 'Sunil A'. The page includes fields for First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Role, User License, Profile, Active status, and various checkboxes for roles like Marketing User, Offline User, Knowledge User, etc. The 'Role' dropdown is set to '<None Specified>'. The 'User License' dropdown is set to 'Salesforce Platform'. The 'Profile' dropdown is set to 'chan'. The 'Active' checkbox is checked. The 'Last Log In' field shows 'Never'. The 'Last Activity' field shows 'Never'.

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.

The screenshot shows the Salesforce Setup interface. On the left, the navigation sidebar includes links like Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, and Administration. Under Administration, there's a 'Users' section with 'Permission Set Groups' and 'Permission Sets'. The 'Permission Sets' link is selected. The main content area displays a 'Permission Set Overview' for 'Permission01'. The 'Edit Properties' dialog is open, showing fields for Label (permission01), API Name (permission01), and Description. It also lists 'Session Activation Required' and 'Activation Required'. Below the dialog, sections for 'App Permissions', 'Apex Class Access', 'Visualforce Page Access', and 'External Data Source Access' are visible.

This screenshot shows the same Salesforce Setup interface as the first one, but with a different view. The 'Object Settings' tab is selected in the 'Accounts' section of the 'Object Permissions' table. The table has columns for 'Permission Name' and 'Enabled'. Rows include Read, Create, Edit, Delete, View All, and Modify All. Below this, the 'Field Permissions' table shows permissions for specific account fields: Account Name, Account Number, Account Owner, Account Site, Account Source, Active, and Annual Revenue. The 'Read Access' and 'Edit Access' columns contain checkboxes, with many checked for certain fields.

The screenshot shows the Salesforce Setup interface with the 'Permission Sets' tab selected. The left sidebar includes links for Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, and Administration (Users, Permission Set Groups). The main content area displays the 'permission01' permission set, showing object permissions for 'Accounts' and field permissions for various account fields.

Object Permissions

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

Field Permissions

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

The screenshot shows the Salesforce Setup interface with the 'All Users' tab selected. The left sidebar includes links for Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, and Administration (Users, Permission Set Groups). The main content area displays a list of users, with two items selected. A modal dialog is open at the bottom, showing the selected users and their details.

Full Name	Role	Profile
Prasanth R	System Administrator	
Chatter Expert	Chatter Free User	
Integration User	Analytics Cloud Integration User	
Sanjay P	Bmanager	
Security User	Analytics Cloud Security User	
Sunil A	chan	
Sunil A	chan	

The screenshot shows the Salesforce Setup interface. On the left, the navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main content area is titled 'Selected Users' and displays a table of users assigned to a permission set. The table columns are: Full Name, Role, Profile, Active, User License, and Expires On. Two users, 'Sunil A' and 'Sunil A', are listed, both assigned to the 'chan' profile and having 'Salesforce Platform' user licenses with 'Never Expires' expiration dates. Above the table, there are options for specifying an expiration date (radio buttons for 'No expiration date' and 'Specify the expiration date', with sub-options for 1 Day, 1 Week, 30 Days, 60 Days, and Custom Date) and a 'Time Zone' dropdown. At the bottom right are 'Back' and 'Assign' buttons.

The screenshot shows the Salesforce Setup interface after the assignment. A green success message at the top states '... > PERMISSION S ... 2 assignments were successful.' Below it, the title 'permission01' is displayed. The main content area is titled 'Assignment Summary' and shows a table of assigned users. The table columns are: Full Name, User License, Expires On, Time Zone, and Status. Two users, 'Sunil A' and 'Sunil A', are listed, both assigned to the 'Salesforce Platform' user license and marked as 'Success' in the status column. At the bottom right is a 'Done' button.

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.

The screenshot shows the 'Survey Result' object in the Object Manager. The 'Fields & Relationships' tab is selected. The table lists the following fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Comment	Comment__c	Text Area(255)		
Created By	CreatedById	Lookup(User)		
Email	Email__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name__c	Text(51)		
Owner	OwnerId	Lookup(User,Group)	✓	
Rating	Rating__c	Picklist		
Survey Result Name	Name	Auto Number	✓	

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

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

Email Template
Thank You Email - Survey

Edit in Builder Edit Clone

Details Related

Information

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

Message Content

Subject Thank You For Completing Our Survey!	Enhanced Letterhead
HTML Value	<p>Hi {{Survey_Result__c.Name__c}},</p> <p>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.</p> <p>Once again, we are extremely grateful for your contributing your valuable time, your honest information, and your thoughtful suggestions.</p> <p>Thanks, Automation Champion</p>

Additional Information

Created By Prasanth R, 12/10/2023, 5: 32 PM	Last Modified By Prasanth R, 12/10/2023, 5: 32 PM
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Step 3: Create an Email Alert

- 1.Click Setup.
- 2.In the Quick Find box, type Email Alerts.
- 3.Select Email Alerts, click on the New Email Alert button.
- 4.Name the Email Alert and click the Tab button. The Unique Name will populate.
- 5.For Object select Survey Result.
- 6.For the Email Template chooses Lightning Email Template Thank You Email – Survey.
- 7.For Recipient Type select Email Field: Email.

8.Click Save.

Survey - Thank You Email

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 for:

Recipients:

Available Recipients	Selected Recipients
User: Integration User User: Rakesh Gupta User: Security User	Email Field: Email

Add Remove

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

Additional Emails

From Email Address: Current User's email address

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

Save Save & New Cancel

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

1.Click Setup.

2.In the Quick Find box, type Flows.

3.Select Flows then click on the New Flow.

4.Select the Screen Flow option and click on Next and configure the flow as follows:

5.How do you want to start building: Freeform

6.We will use the Screen element to capture a Survey response form. Drag and drop a Screen element onto the canvas.

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

Response

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

Row 1:

Field: Comment__c
Value: { !Comment}
Click Add Row

Row 2:

Field: Email__c
Value: { !Email.value}
Click Add Row

Row3:

Field: Name__c
Value: { !Name.firstName} { !Name.lastName}
Click Add Row

Row 3:

Field: Rating__c
Value: { !Rating}

7.Click Done.

Edit Create Records

Create Salesforce records using values from the flow.

*Label <input type="text" value="Save Response"/>	*API Name <input type="text" value="Save_Response"/>
Description <div style="border: 1px solid #ccc; height: 50px; width: 100%;"></div>	

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**

Set Field Values for the Survey Result

Field	Value
<input type="text" value="Comment__c"/>	<input type="text" value="A_a Comment X"/> ← A_a Comment X X
<input type="text" value="Email__c"/>	<input type="text" value="A_a Email > Value X"/> ← A_a Email > Value X X
<input type="text" value="Name__c"/>	<input type="text" value="(!Name.firstName) (!Name.lastName)"/> ← (!Name.firstName) (!Name.lastName) X
<input type="text" value="Rating__c"/>	<input type="text" value="A_a Rating X"/> ← A_a Rating X X
+ Add Field <input type="checkbox" value="Manually assign variables"/> Manually assign variables	

Cancel
Done

Step 4.3: Salesforce Flow – Call an Action – Email Alert to Send Out Thank You Email

- 1.Under Toolbox, select Element.
- 2.Drag-and-drop Action element onto the Flow designer.
- 3.In the Action box, type Survey – Thank You Email.
- 4.Clicks on the Survey – Thank You Email email alert.
- 5.Click Done.

Edit "Survey - Thank You Email" email alert

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

* Label

Send Thank You Email

* API Name

Send_Thank_You_Email

Description

Set Input Values

A3 * Record ID

{!Save_Response}

[Cancel](#)

[Done](#)

Save as

A New Version A New Flow

* Flow Label Survey * Flow API Name Survey

Description

Hide Advanced

How to Run the Flow User or System Context—Depends on How Flow is Launched

* Type Screen Flow

* API Version for Running the Flow 51

Interview Label Insert a resource... Survey {!\$Flow.CurrentDateTime}

Last Modified 12/10/2023, 5:32 PM by Prasanth R

Status: Active Type: Screen Flow Version Number: 2

Cancel Save

This screenshot shows the 'Save as' dialog for a new flow named 'Survey'. It includes fields for Flow Label ('Survey'), Flow API Name ('Survey'), and a Description section. Under 'How to Run the Flow', it specifies 'User or System Context—Depends on How Flow is Launched'. The 'Type' is set to 'Screen Flow' and the 'API Version for Running the Flow' is '51'. The 'Interview Label' field contains the expression 'Survey {!\$Flow.CurrentDateTime}'. Below this, the 'Last Modified' information is shown as '12/10/2023, 5:32 PM by Prasanth R'. At the bottom, status is 'Active', type is 'Screen Flow', and version number is '2'. The 'Save' button is highlighted.

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.

File ▾ Edit ▾ Debug ▾ Test ▾ Workspace ▾ Help ▾ < >

VFPageToLC.app *

```
1 ▼ <aura:application access="global"
2           extends="ltng:outApp"
3           implements="ltng:allowGuestAccess">
4       <aura:dependency resource="lightning:flow"/>
5 </aura:application>
```

Logs, Tests, and Problems

Visualforce Page
Survey

Page Edit

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

Page Information

Label: Survey
Name: Survey
Description:

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

Require CSRF protection on GET requests

Visualforce Markup

```

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

```

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

Now we will create a site to open the flow for unauthenticated access. 1.Click Setup.

2.In the Quick Find box, type Sites.

3.Clicks on the New button.

4.Fill the details as per the screenshot below:

5.Click Save.

Site Edit

Save **Cancel**

Site Label	Survey 
Site Name	Survey 
Site Description	
Site Contact	Prasanth R  
Default Record Owner	Prasanth R  
Default Web Address	http://katihar-developer-edition.gus.force.com/ survey 
Active	<input checked="" type="checkbox"/> 
Active Site Home Page	Survey   [Preview]
Inactive Site Home Page	InMaintenance   [Preview]
Site Template	SiteTemplate  
Site Robots.txt	 
Site Favorite Icon	 
Analytics Tracking Code	 
URL Rewriter Class	  
Enable Feeds	<input type="checkbox"/>
Clickjack Protection Level	Allow framing by the same origin only (Recommended)  
Require Secure Connections (HTTPS)	<input checked="" type="checkbox"/> 
Lightning Features for Guest Users	<input checked="" type="checkbox"/> 
Upgrade all requests to HTTPS	<input checked="" type="checkbox"/> 
Enable Content Sniffing Protection	<input checked="" type="checkbox"/> 
Enable Browser Cross Site Scripting Protection	<input checked="" type="checkbox"/> 
Referrer URL Protection	<input checked="" type="checkbox"/> 
Guest Access to the Payments API	<input type="checkbox"/> 

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

Proof of Concept

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

Survey

Name

First Name
Alok

Last Name
Sinfal

*Email
[REDACTED]

*Rating
5

*Comment
Awesome Blog

Next



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

Row 1:

Field: Comment__c

Value: {!Comment}

Click Add Row

Row 2:

Field: Email__c

Value: {!Email.value}

Click Add Row

Row 3:

Field: Name__c

Value: {!Name.firstName} {!Name.lastName}

Click Add Row

Row 3:

Field: Rating__c

Value: {!Rating}

Click Done.