

**NAAN MUDHALVAN**

**Salesforce Developer (Course)**

**Assignment no 1**

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Year & Dep : IV year & CSBS

Batch : 2024

Zone no : Zone 8

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

## Step 1: Create Custom Objects.

The screenshot shows the 'Custom Object Definition Edit' page for creating a new custom object. The 'Label' field is set to 'Parent' and the 'Plural Label' is set to 'Parents'. The 'Object Name' field is also set to 'Parent'. The 'Data Type' is selected as 'Text'. The 'Record Name' field is set to 'Parent Name' and the 'Content Name' dropdown is set to 'None'. The 'Description' field is empty. The 'Context-Sensitive Help Setting' section has the radio button for 'Open the standard Salesforce.com Help & Training window' selected. The sidebar on the left lists various object settings like Fields & Relationships, Page Layouts, and Record Types.

The screenshot shows the 'Custom Object Definition Edit' page for creating a new custom object. The 'Label' field is set to 'Child' and the 'Plural Label' is set to 'Children'. The 'Object Name' field is also set to 'Child'. The 'Data Type' is selected as 'Text'. The 'Record Name' field is set to 'Child Name' and the 'Content Name' dropdown is set to 'None'. The 'Description' field is empty. The 'Context-Sensitive Help Setting' section has the radio button for 'Open the standard Salesforce.com Help & Training window' selected. The sidebar on the left lists various object settings like Fields & Relationships, Page Layouts, and Record Types.

## 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 Setup interface with the following details:

- Header:** Includes the Salesforce logo, a search bar labeled "Search Setup", and various navigation icons.
- Breadcrumbs:** "SETUP > OBJECT MANAGER" followed by "Parent".
- Left Sidebar:** A navigation menu with items like "Details", "Fields & Relationships" (which is selected), "Page Layouts", "Lightning Record Pages", etc.
- Main Content Area:**
  - Section Title:** "Fields & Relationships" with a note "4 Items, Sorted by Field Label".
  - Table:** Displays four rows of field information:

| 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) |                   | ✓       |

Cloud icon

Search Setup

Setup Home Object Manager

**Parent**

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 Custom Field

Step 1. Choose the field type

Help for this Page

Step 1

Next Cancel

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

**Data Type**

None Selected Select one of the data types below.

Auto Number 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 rollup 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.

Cloud icon

Search Setup

Setup Home Object Manager

**Parent**

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

Help for this Page

Step 2 of 6

Previous Next Cancel

Select the other object to which this object is related.

Related To Child

Previous Next Cancel

**Child**

**Fields & Relationships**

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

**Step 1. Choose the field type**

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 rollup 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.
- Checkbox Allows users to select a True (checked) or False (unchecked) value.
- Currency Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

## 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 a search bar and navigation links for 'Setup', 'Home', 'Object Manager', and 'User Interface'. Under 'User Interface', 'Tabs' is selected. The main content area is titled 'Tabs' and contains four sections:

- Custom Object Tabs:** Displays four tabs: 'Brokers' (People), 'Chilids' (Lightning), 'Parents' (Lightning), and 'Properties' (Real Estate Sign). Each tab has an 'Edit | Del' button and a 'Label' column.
- Web Tabs:** Displays the message 'No Web Tabs have been defined'.
- Visualforce Tabs:** Displays the message 'No Visualforce Tabs have been defined'.
- Lightning Component Tabs:** Displays the message 'No Lightning component tabs have been defined'.

## 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.**

**Lightning Experience App Manager**

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

**New Lightning App**

### App Details & Branding

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

**App Details**

\*App Name (Required)

\*Developer Name (Required)

Description (Optional)

**App Branding**

Image (Optional)

Primary Color Hex  
Value (Optional)  
 #007002

Org Theme Options  
 Use the app's image and color instead of the org's custom theme

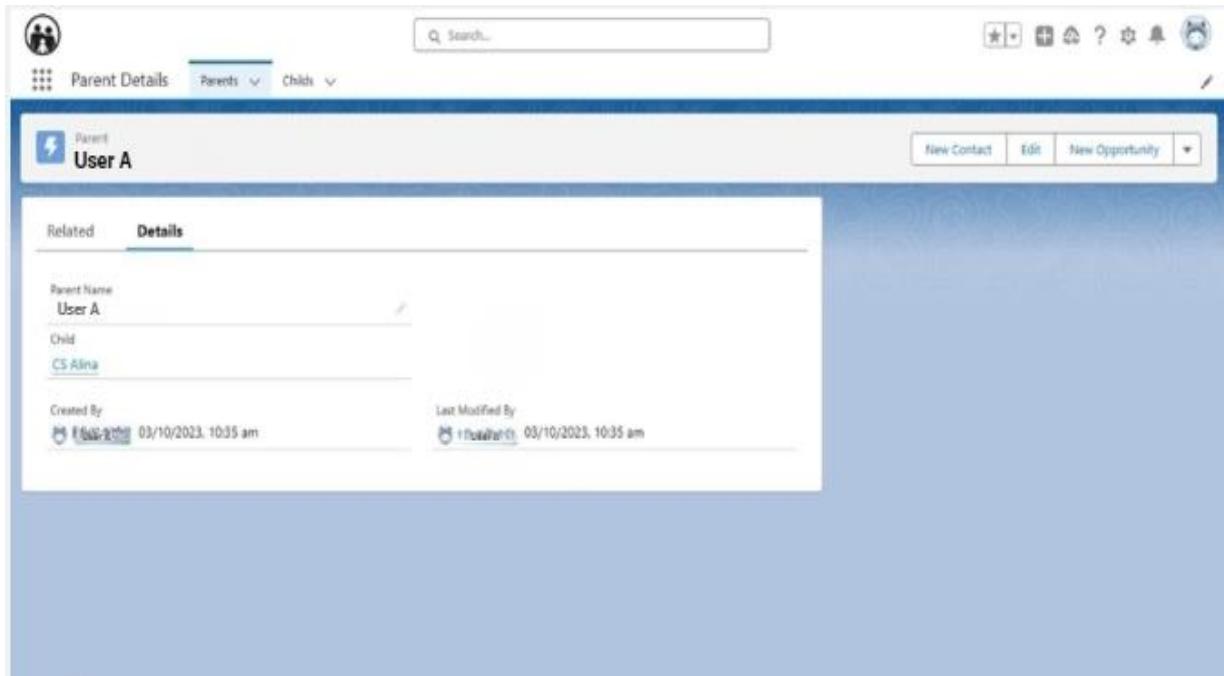
**App Launcher Preview**

Next

## Step 5: Test the Relationship and Roll-Up Summary Field

**Create some records in both the Parent and Child objects and verify that the Roll-Up Summary Field correctly calculates the total number of related Child records on the Parent record.**

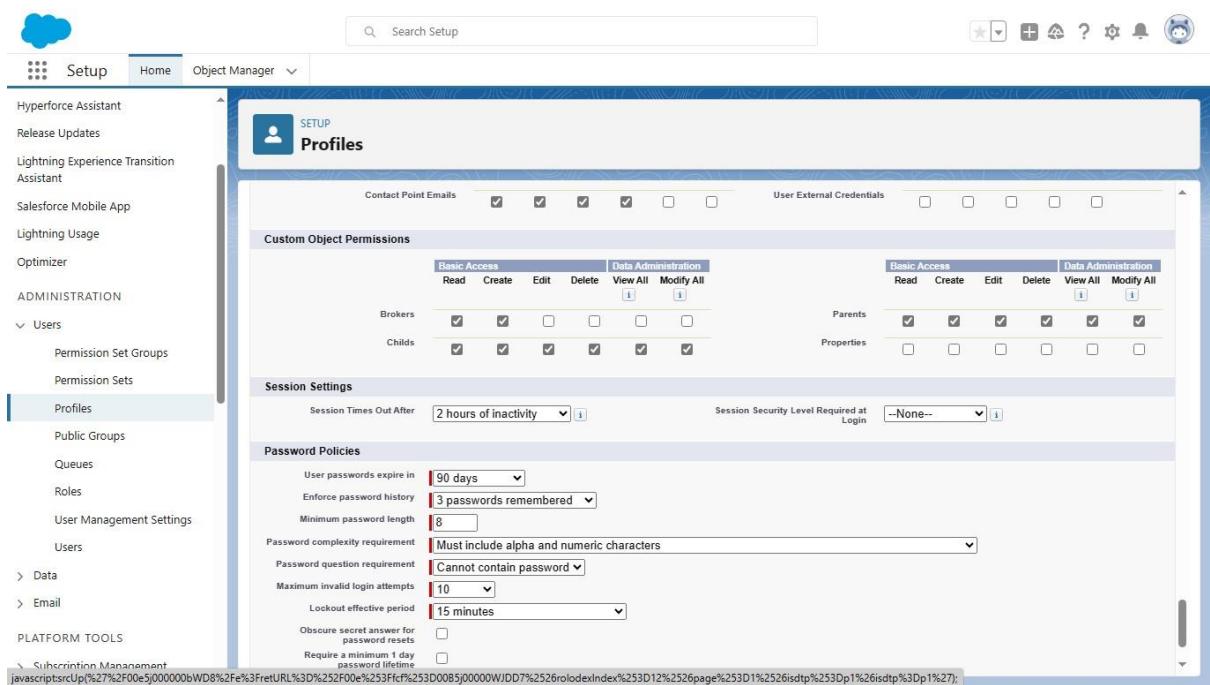
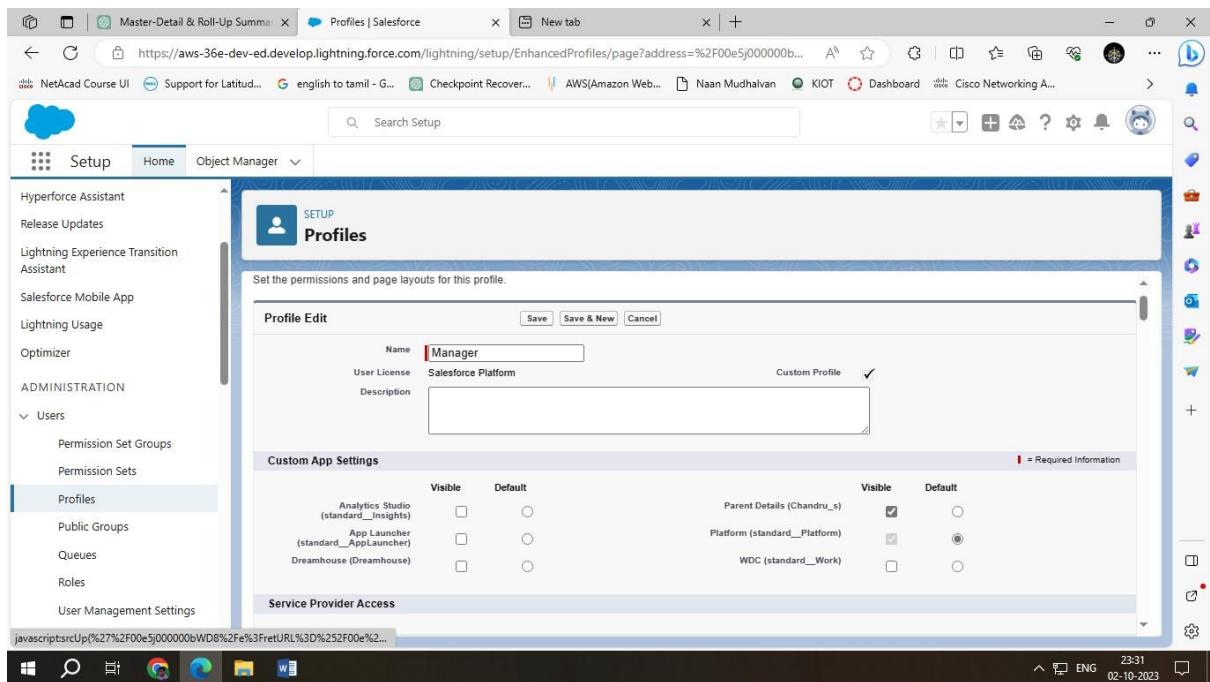
**That's it! You've successfully created a Master-Detail relationship between two custom objects (Parent and Child) and set up a Roll-Up Summary Field to calculate the total number of records in the Child object.**



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

User Edit  
logith j

General Information

|            |                                |                           |                                     |
|------------|--------------------------------|---------------------------|-------------------------------------|
| First Name | logith                         | Role                      | <None Specified>                    |
| Last Name  | j                              | User License              | Salesforce                          |
| Alias      | jj                             | Profile                   | System Administrator                |
| Email      | 2k20csbs22@kiot.ac.in          | Active                    | <input checked="" type="checkbox"/> |
| Username   | logith@naanmudhalvan.com       | Marketing User            | <input checked="" type="checkbox"/> |
| Nickname   | User1696307208260774158        | Offline User              | <input checked="" type="checkbox"/> |
| Title      |                                | Knowledge User            | <input type="checkbox"/>            |
| Company    | knowledge institute of technic | Flow User                 | <input type="checkbox"/>            |
| Department |                                | Service Cloud User        | <input checked="" type="checkbox"/> |
| Division   |                                | Site.com Contributor User | <input type="checkbox"/>            |
|            |                                | Site.com Publisher User   | <input type="checkbox"/>            |
|            |                                | WDC User                  | <input type="checkbox"/>            |

All Users

| Action                          | Full Name        | Alias  | Username  | Role                  | Active                              | Profile                          |
|---------------------------------|------------------|--------|---|-----------------------|-------------------------------------|----------------------------------|
| <input type="checkbox"/>   Edit | A_User           | ua     | ua@123@gmail.com  | VP_Marketing          | <input checked="" type="checkbox"/> | Marketing User                   |
| <input type="checkbox"/>   Edit | B_User           | ub     | ub@1234@gmail.com   | SVP_Sales & Marketing | <input checked="" type="checkbox"/> | Standard Platform User           |
| <input type="checkbox"/>   Edit | Chatter_Expert   | chatty | chatty@005h0000008o97yeac.yuvmc0lgz6d5@chatter.salesforce.com |                       | <input checked="" type="checkbox"/> | Chatter Free User                |
| <input type="checkbox"/>   Edit | logith           | jj     | logith@naanmudhalvan.com                                      |                       | <input checked="" type="checkbox"/> | System Administrator             |
| <input type="checkbox"/>   Edit | User_Integration | integ  | integration@005h0000008o97yeac.com                            |                       | <input checked="" type="checkbox"/> | Analytics Cloud Integration User |
| <input type="checkbox"/>   Edit | User_Security    | sec    | insightssecurity@00d5h000008o97yeac.com                       |                       | <input checked="" type="checkbox"/> | Analytics Cloud Security User    |

Gmail

Compose

Inbox 7,734

Starred

Snoozed

Sent

Drafts 2

More

Labels +

smartclif

salesforce account

Welcome to Salesforce: Verify your account

developer@salesforce.com <developer@salesforce.com> to me

Tue, Aug 29, 9:59 AM

1 of 33

Thanks for signing up with Salesforce!

Click below to verify your account.

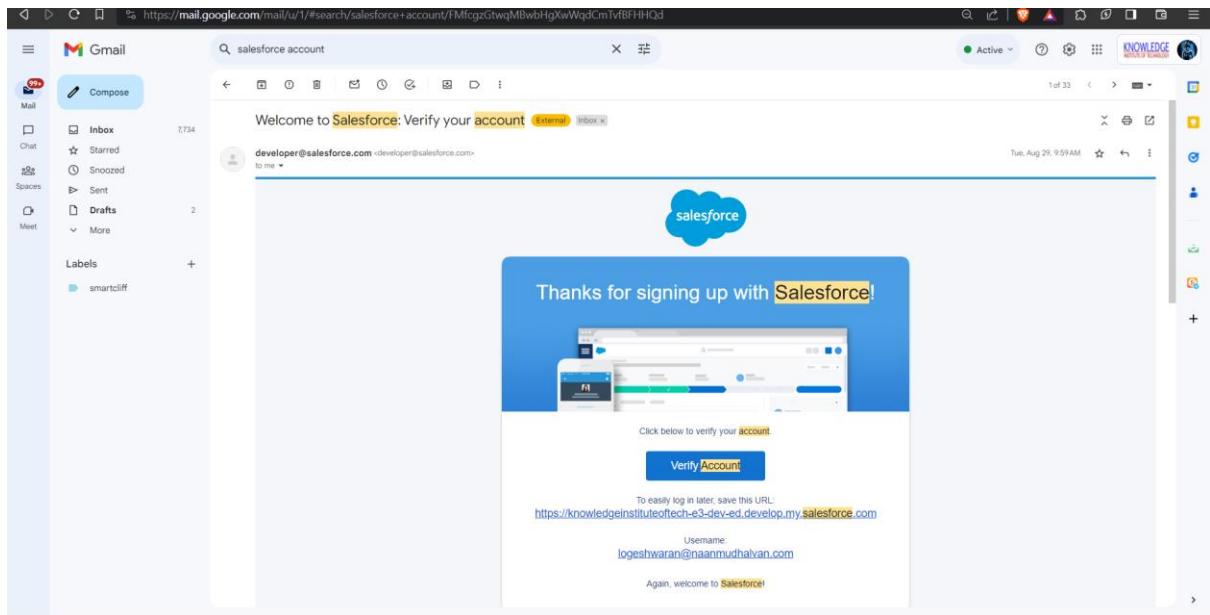
Verify Account

To easily log in later, save this URL.  
<https://knowledgeinstituteoftech-e3-dev-ed.my.salesforce.com>

Username:  
logeshwaran@naannmudhalvan.com

Again, welcome to Salesforce!

knowledgeinstituteoftech-e3-dev-ed.my.salesforce.com



salesforce

Change Your Password

Please enter new password for developer@naannmudhalvan.com. Enter new password and click Save.

• 12 characters

• 1 letter

• 1 number

New Password:

Confirm New Password:

Copy to clipboard

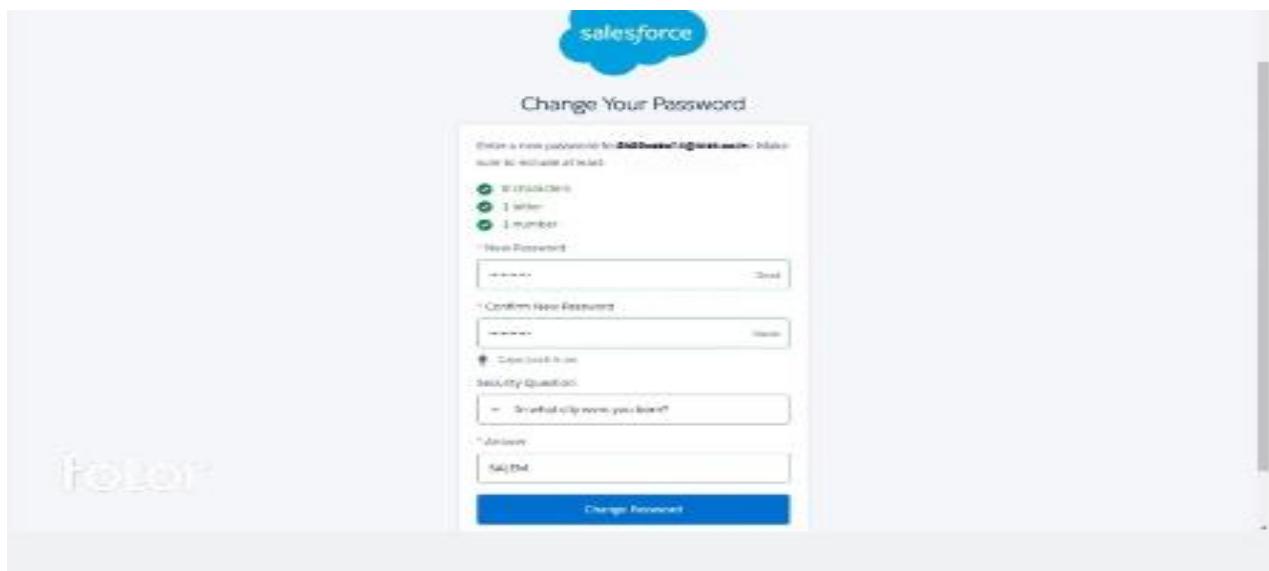
Security Questions:

What is your favorite color?

Address:

Kelvin

Change Password



## 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.

## Step 3: Assign Records Ownership

The screenshot shows the Salesforce Setup interface. On the left, the navigation sidebar is open, showing various administrative sections like Hyperforce Assistant, Release Updates, and Administration. Under Administration, the 'Users' section is expanded, and 'Permission Sets' is selected, which is highlighted with a blue border. The main content area is titled 'Permission Sets' and shows a 'Create' form for a new permission set. The form has fields for 'Label' (set to 'permission'), 'API Name' (set to 'permission'), and 'Description'. There is also a checkbox for 'Session Activation Required'. Below these, there's a section titled 'Select the type of users who will use this permission set' with a note about choosing a license. A dropdown menu for 'License' is open, showing '-None-' as the selected option. At the bottom of the form are 'Save' and 'Cancel' buttons.

The screenshot shows the Salesforce Setup interface. The left sidebar is identical to the previous screenshot, with 'Permission Sets' selected. The main content area shows the details of a permission set named 'permission'. At the top, there are buttons for 'Find Settings...', 'Clone', 'Delete', 'Edit Properties', and 'Manage Assignments'. Below this, the 'Object Settings' tab is selected. The 'Object Settings' table lists various objects and their permissions. The columns are 'Object Name', 'Object Permissions', 'Total Fields', and 'Tab Settings'. Some rows show 'No Access' while others show specific counts like 40, 14, or 30. The table includes entries for Accounts, AI Insight Reasons, AI Record Insights, Alternative Payment Methods, API Anomaly Event Stores, App Analytics Query Requests, Application Usage Assignments, Appointment Categories, Appointment Invitations, Appointment Invitees, Appointment Schedule Aggregates, Appointment Schedule Logs, Appointment Topic Time Slots, Asset Actions, Asset Action Sources, Asset Relationships, Assets, and Asset State Periods.

| Object Name                     | Object Permissions | Total Fields | Tab Settings |
|---------------------------------|--------------------|--------------|--------------|
| Accounts                        | No Access          | 40           | --           |
| AI Insight Reasons              | No Access          | --           | --           |
| AI Record Insights              | No Access          | --           | --           |
| Alternative Payment Methods     | No Access          | 27           | --           |
| API Anomaly Event Stores        | No Access          | 14           | --           |
| App Analytics Query Requests    | No Access          | --           | --           |
| Application Usage Assignments   | No Access          | --           | --           |
| Appointment Categories          | No Access          | 3            | --           |
| Appointment Invitations         | No Access          | 17           | --           |
| Appointment Invitees            | --                 | 4            | --           |
| Appointment Schedule Aggregates | No Access          | --           | --           |
| Appointment Schedule Logs       | No Access          | --           | --           |
| Appointment Topic Time Slots    | No Access          | 6            | --           |
| Asset Actions                   | No Access          | 30           | --           |
| Asset Action Sources            | No Access          | 18           | --           |
| Asset Relationships             | --                 | 10           | --           |
| Assets                          | No Access          | 42           | --           |
| Asset State Periods             | No Access          | 11           | --           |

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, Profiles, Public Groups, Queues, Roles, User Management Settings, Users), DATA (Data, Email), PLATFORM TOOLS (Subscription Management).
- Current Page:** SETUP > Permission Sets > permission
- Content Area:**
  - 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 checked="" type="checkbox"/> |
| Created By | <input type="checkbox"/>            | <input type="checkbox"/>            |

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

- Header:** Search Setup, Home, Object Manager.
- Left sidebar:** user, Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, Users, Feature Settings, Data.com, Prospectors, Service.
- Current Page:** SETUP > Permission Sets
- Content Area:**
  - Section:** Permission Sets
  - Description:** On this page you can create, view, and manage permission sets.
  - Buttons:** All Permission Sets, Edit, Delete, Create New View.
  - Table:** A list of permission sets with columns: Action, Permission Set Label, Description, License.

| Action                   | Permission Set Label | Description                           | License                                    |
|--------------------------|----------------------|---------------------------------------|--|
| <input type="checkbox"/> | Clone                | Buyer                                 | B2B Buyer Permission Set One Seat          |
| <input type="checkbox"/> | Clone                | Buyer Manager                         | B2B Buyer Manager Permission Set One Seat  |
| <input type="checkbox"/> | Clone                | C360 High Scale Flow Integration User | Cloud Integration User                     |
| <input type="checkbox"/> | Clone                | CRM User                              | CRM User                                   |
| <input type="checkbox"/> | Clone                | Commerce Admin                        | Commerce Admin Permission Set License Seat |
| <input type="checkbox"/> | Clone                | Contact Center Admin                  | Service Cloud Voice User                   |



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:** The main content area is titled "Permission Sets".
- Table:** A grid showing permission sets and their access levels across various objects. The columns include Object Name, Access Level, and Counts for No Access, Create, Edit, and Delete.

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

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:** The main content area is titled "Permission Sets" and shows a specific permission set named "permission".
- Form Fields:**
  - Parents:** Shows a table with columns Available and Visible, both currently empty.
  - Object Permissions:** Shows a table with columns Permission Name and Enabled. All permissions (Read, Create, Edit, Delete, View All, Modify All) are checked.
  - Field Permissions:** Shows a table with columns Field Name, Read Access, and Edit Access. The "Child" field has both checkboxes checked.



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.

**All Users**

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

To get more licenses, use the Your Account app. [Let's Go](#)

View: [All Users](#) | [Edit](#) | [Create New View](#)

| Action               | Full Name        | Alias   | Username   | Role                             | Active                              | Profile                |
|----------------------|------------------|---------|--|----------------------------------|-------------------------------------|------------------------|
| <a href="#">Edit</a> | A_User           | ua      | ua@123@gmail.com   | VP_Marketing                     | <input checked="" type="checkbox"/> | Marketing_User         |
| <a href="#">Edit</a> | B_User           | ub      | ub@1234@gmail.com  | SVP_Sales & Marketing            | <input checked="" type="checkbox"/> | Standard_Platform_User |
| <a href="#">Edit</a> | Chatter_Expert   | Chatter | chatty.00d5h0000008o97yeac.yuvmc0lgzsd5@chatter.salesforce.com | Chatter_Free_User                | <input checked="" type="checkbox"/> |                        |
| <a href="#">Edit</a> | J_Logith         | j       | logith@naanmudhalvan.com                                       | System_Administrator             | <input checked="" type="checkbox"/> |                        |
| <a href="#">Edit</a> | User_Integration | integ   | integration@00d5h0000008o97yeac.com                            | Analytics_Cloud_Integration_User | <input checked="" type="checkbox"/> |                        |
| <a href="#">Edit</a> | User_Security    | sec     | insightsecurity@00d5h0000008o97yeac.com                        | Analytics_Cloud_Security_User    | <input checked="" type="checkbox"/> |                        |

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

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

**Profiles**

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

| Action                         | Profile Name                       | User License                     | Custom                              |
|--------------------------------|------------------------------------|----------------------------------|-------------------------------------|
| <a href="#">Edit   Clone</a>   | Analytics_Cloud_Integration_User   | Analytics_Cloud_Integration_User | <input type="checkbox"/>            |
| <a href="#">Edit   Clone</a>   | Analytics_Cloud_Security_User      | Analytics_Cloud_Security_User    | <input type="checkbox"/>            |
| <a href="#">Edit   Clone</a>   | Authenticated_Website              | Authenticated_Website            | <input type="checkbox"/>            |
| <a href="#">Edit   Clone</a>   | Authenticated_Website              | Authenticated_Website            | <input type="checkbox"/>            |
| <a href="#">Edit   Clone</a>   | Manager                            | Salesforce_Platform              | <input checked="" type="checkbox"/> |
| <a href="#">Edit   Clone</a>   | Chatter_External_User              | Chatter_External                 | <input type="checkbox"/>            |
| <a href="#">Edit   Clone</a>   | Chatter_Free_User                  | Chatter_Free                     | <input type="checkbox"/>            |
| <a href="#">Edit   Clone</a>   | Chatter_Moderator_User             | Chatter_Free                     | <input type="checkbox"/>            |
| <a href="#">Edit   Clone</a>   | Contact_Manager                    | Salesforce                       | <input type="checkbox"/>            |
| <a href="#">Edit   Clone</a>   | Cross_Org_Data_Proxy_User          | XOrg_Proxy_User                  | <input type="checkbox"/>            |
| <a href="#">Edit   Del ...</a> | Custom_Marketing_Profile           | Salesforce                       | <input checked="" type="checkbox"/> |
| <a href="#">Edit   Del ...</a> | Custom_Sales_Profile               | Salesforce                       | <input checked="" type="checkbox"/> |
| <a href="#">Edit   Del ...</a> | Custom_Support_Profile             | Salesforce                       | <input checked="" type="checkbox"/> |
| <a href="#">Edit   Clone</a>   | Customer_Community_Login_User      | Customer_Community_Login         | <input type="checkbox"/>            |
| <a href="#">Edit   Clone</a>   | Customer_Community_Plus_Login_User | Customer_Community_Plus_Login    | <input type="checkbox"/>            |
| <a href="#">Edit   Clone</a>   | Customer_Community_Plus_User       | Customer_Community_Plus          | <input type="checkbox"/>            |

1-25 of 41 | 0 Selected | [Previous](#) [Next](#)

Page 1 of 2

The screenshot shows the Salesforce Setup interface with the 'Profiles' page selected. On the left, the navigation sidebar includes 'Optimizer', 'ADMINISTRATION' (with 'Users' expanded), 'PLATFORM TOOLS', and various integration options like 'Subscription Management', 'Apps', 'Feature Settings', 'Slack', 'MuleSoft', and 'Einstein'. The main content area is titled 'Clone Profile' and displays a form to clone an existing profile. The form fields include 'Existing Profile' (set to 'Standard Platform User'), 'User License' (set to 'Salesforce Platform'), and 'Profile Name' (set to 'Manager'). A note at the top says 'You must select an existing profile to clone from.' Buttons for 'Save' and 'Cancel' are at the bottom.

The screenshot shows the Salesforce Setup interface with the 'Profiles' page selected. The navigation sidebar includes 'Optimizer', 'ADMINISTRATION' (with 'Users' expanded), 'PLATFORM TOOLS', and various integration options. The main content area shows the 'Profile Detail' for the 'red' profile. The profile details are as follows:

| Name         | red                              | Custom Profile | ✓                   |
|--------------|----------------------------------|----------------|---------------------|
| User License | Analytics Cloud Integration User |                |                     |
| Description  |                                  |                |                     |
| Created By   | logithi                          | Modified By    | logithi             |
|              | 19/10/2023, 7:38 pm              |                | 19/10/2023, 7:38 pm |

Below the profile details, the 'Page Layouts' section lists standard object layouts for Global, Email Application, and Home Page Layout, each associated with specific global layouts. The 'Object Milestone' and 'Operating Hours' sections are also visible.

The screenshot shows the Salesforce Setup interface for managing Page Layouts. The left sidebar is collapsed, and the main area displays the "Page Layouts" section under the "Profiles" tab. The table lists various object layouts with their global assignments:

| Object                     | Global Layout   | Object Milestone Layout   |
|----------------------------|---|---|
| Global                     | <a href="#">Global Layout [View Assignment]</a>                     | <a href="#">Object Milestone Layout [View Assignment]</a>                 |
| Email Application          | <a href="#">Not Assigned [View Assignment]</a>                      | <a href="#">Operating Hours Layout [View Assignment]</a>                  |
| Home Page Layout           | <a href="#">Home Page Default [View Assignment]</a>                 | <a href="#">Order Layout [View Assignment]</a>                            |
| Account                    | <a href="#">Account Layout [View Assignment]</a>                    | <a href="#">Order Product Layout [View Assignment]</a>                    |
| Alternative Payment Method | <a href="#">Alternative Payment Method Layout [View Assignment]</a> | <a href="#">Payment Layout [View Assignment]</a>                          |
| Appointment Invitation     | <a href="#">Appointment Invitation Layout [View Assignment]</a>     | <a href="#">Payment Authorization Layout [View Assignment]</a>            |
| Asset                      | <a href="#">Asset Layout [View Assignment]</a>                      | <a href="#">Payment Authorization Adjustment Layout [View Assignment]</a> |
| Asset Relationship         | <a href="#">Asset Relationship Layout [View Assignment]</a>         | <a href="#">Payment Gateway Layout [View Assignment]</a>                  |
| Assigned Resource          | <a href="#">Assigned Resource Layout [View Assignment]</a>          | <a href="#">Payment Gateway Log Layout [View Assignment]</a>              |

The screenshot shows the "Profiles" setup page with the "Session Settings" and "Password Policies" sections expanded. The "Session Settings" section includes fields for session timeout and security level. The "Password Policies" section contains the following configuration:

- 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: (unchecked)
- Require a minimum 1 day password lifetime: (unchecked)
- Don't immediately expire links in forgot password emails: (unchecked)

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

- Header:** Includes a cloud icon, "Setup", "Home", "Object Manager", and various navigation icons.
- Search Bar:** A search bar with the placeholder "Search Setup".
- Left Sidebar:**
  - Search bar: "user"
  - Users** (selected): "Permission Set Groups", "Permission Sets", "Profiles" (selected), "Public Groups", "Queues", "Roles", "User Management Settings", "Users".
  - Feature Settings**: "Data.com", "Prospector Users" (selected), "Service", "Embedded Service".
- Content Area:**

## SETUP Profiles

Profile Edit red

Set the permissions and page layouts for this profile.

**Profile Edit**

| Profile Edit |                                  | Save | Save & New | Cancel |
|--------------|----------------------------------|------|------------|--------|
| Name         | red                              |      |            |        |
| User License | Analytics Cloud Integration User |      |            |        |
| Description  |                                  |      |            |        |

**Custom App Settings**

|  | Visible                             | Default                          | Visible                             | Default                          |
|--|-------------------------------------|----------------------------------|-------------------------------------|----------------------------------|
| Analytics Studio<br>(standard__Insights) | <input type="checkbox"/>            | <input checked="" type="radio"/> | <input checked="" type="checkbox"/> | <input type="radio"/>            |
| App Launcher<br>(standard__AppLauncher)  | <input type="checkbox"/>            | <input checked="" type="radio"/> | <input type="checkbox"/>            | <input checked="" type="radio"/> |
| Platform (standard__Platform)            | <input checked="" type="checkbox"/> | <input type="radio"/>            |                                     |                                  |
| WDC (standard__Work)                     | <input type="checkbox"/>            | <input checked="" type="radio"/> |                                     |                                  |

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

- Header:** Includes a cloud icon, "Setup", "Home", "Object Manager", and various navigation icons.
- Search Bar:** A search bar with the placeholder "Search Setup".
- Left Sidebar:**
  - Search bar: "User"
  - Users** (selected): "Permission Set Groups", "Permission Sets", "Profiles", "Public Groups", "Queues", "Roles", "User Management Settings", "Users" (selected).
  - Feature Settings**: "Data.com", "Prospector Users", "Service", "Embedded Service".
- Content Area:**

## SETUP Users

All Users

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

To get more licenses, use the Your Account app. [Let's Go](#)

View: All Users | [Edit](#) | [Create New View](#)

| Action               | Full Name        | Alias   | Username   | Role                             | Active                              | Profile                |
|----------------------|------------------|---------|--|----------------------------------|-------------------------------------|------------------------|
| <a href="#">Edit</a> | A_User           | ua      | ua@123@gmail.com   | VP_Marketing                     | <input checked="" type="checkbox"/> | Marketing_User         |
| <a href="#">Edit</a> | B_User           | ub      | ub@1234@gmail.com  | SVP_Sales & Marketing            | <input checked="" type="checkbox"/> | Standard_Platform_User |
| <a href="#">Edit</a> | Chatter_Expert   | Chatter | chatty.00d5h0000008o97yeac.yuvmc0lozsd5@chatter.salesforce.com | Chatter_Free_User                | <input checked="" type="checkbox"/> |                        |
| <a href="#">Edit</a> | I.Login          | ii      | login@naanmujihalvan.com                                       | System_Administrator             | <input checked="" type="checkbox"/> |                        |
| <a href="#">Edit</a> | User_Integration | integ   | integration@00d5h0000008o97yeac.com                            | Analytics_Cloud_Integration_User | <input checked="" type="checkbox"/> |                        |
| <a href="#">Edit</a> | User_Security    | sec     | insightsecurity@00d5h0000008o97yeac.com                        | Analytics_Cloud_Security_User    | <input checked="" type="checkbox"/> |                        |

knowledgeinstituteoftech-4c-dev-ed.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F0055h000009oZWm%2Fe%3FisUserEntityOver...

Setup Home Object Manager

User

Users

Permission Set Groups  
Permission Sets  
Profiles  
Public Groups  
Queues  
Roles  
User Management Settings  
**Users**  
Feature Settings  
Data.com  
Prospector Users  
Service  
Embedded Service  
Messaging for In-App

logith j

User Edit

General Information

|            |                              |                           |                                     |
|------------|------------------------------|---------------------------|-------------------------------------|
| First Name | logith                       | Role                      | <None Specified>                    |
| Last Name  | j                            | User License              | Salesforce                          |
| Alias      | j                            | Profile                   | System Administrator                |
| Email      | 2k20csbs22@kiot.ac.in        | Active                    | <input checked="" type="checkbox"/> |
| Username   | logith@naanmudhalvan.com     | Marketing User            | <input checked="" type="checkbox"/> |
| Nickname   | User1696307208260774158      | Offline User              | <input checked="" type="checkbox"/> |
| Title      |                              | Knowledge User            | <input type="checkbox"/>            |
| Company    | knowledge institute of techn | Flow User                 | <input type="checkbox"/>            |
| Department |                              | Service Cloud User        | <input checked="" type="checkbox"/> |
| Division   |                              | Site.com Contributor User | <input type="checkbox"/>            |
|            |                              | Site.com Publisher User   | <input type="checkbox"/>            |
|            |                              | WDC User                  | <input type="checkbox"/>            |

Help for this Page

[javascriptrsrcUp(%27%2F0055h000009oZWm%3Fisredirect%3D1%26isUserEntityOveride%3D1%26isotp%3Dp1%27);]

knowledgeinstituteoftech-4c-dev-ed.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F0055h000009oZWm%2Fe%3FisUserEntityOver...

Setup Home Object Manager

User

Users

Permission Set Groups  
Permission Sets  
Profiles  
Public Groups  
Queues  
Roles  
User Management Settings  
**Users**  
Feature Settings  
Data.com  
Prospector Users  
Service  
Embedded Service  
Messaging for In-App and Web User

logith j

User Detail

Permission Set Assignments [1] | Permission Set Assignments: Activation Required [0] | Permission Set Group Assignments [0] | Permission Set License Assignments [0] | Personal Groups [0] | Public Group Membership [0] | Queue Membership [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 [12d] | User Provisioning Accounts [0]

|            |  |                           |                                     |
|------------|--|---------------------------|-------------------------------------|
| Name       | logith j                                       | Role                      | Salesforce                          |
| Alias      | j  | User License              | System Administrator                |
| Email      | 2k20csbs22@kiot.ac.in [Verified]               | Profile                   | System Administrator                |
| Username   | logith@naanmudhalvan.com                       | Active                    | <input checked="" type="checkbox"/> |
| Nickname   | User1696307208260774158                        | Marketing User            | <input checked="" type="checkbox"/> |
| Title      |  | Offline User              | <input checked="" type="checkbox"/> |
| Company    | knowledge institute of technology              | Knowledge User            | <input type="checkbox"/>            |
| Department |  | Flow User                 | <input type="checkbox"/>            |
| Division   | IN   | Service Cloud User        | <input checked="" type="checkbox"/> |
| Address    | IN   | 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 | <a href="#">View</a>                |

User Profile Help for this Page

| Action                   | Full Name | Alias | Username                 | Role                 | Active                              | Profile |
|--------------------------|-----------|-------|--------------------------|----------------------|-------------------------------------|---------|
| <input type="checkbox"/> | j_login   | j     | jlogin@naanmudhalvan.com | System Administrator | <input checked="" type="checkbox"/> |         |

## 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.

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

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 (with sub-links for User Management Settings). The main content area is titled 'Permission Sets' and shows a permission set named 'permission01'. A modal window titled 'Edit Properties' is open, displaying fields for Label ('permission01'), API Name ('permission01'), Description, Session Activation Required (unchecked), and a Save button.

This screenshot shows the 'Accounts' tab of the 'Object Permissions' section for the 'permission01' permission set. Under 'Object Permissions', there is a table for the 'Accounts' object:

| 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"/> |

Below this, under 'Field Permissions', there is a table for the 'Account' object:

| 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 following details:

- Header:** Includes the Salesforce logo, a search bar labeled "Search Setup", and various navigation icons.
- Left Sidebar:** A navigation menu with 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", and "Users".
- Current Page:** "Permission Sets" under "ADMINISTRATION".
- Content Area:** Displays the "Permission Set Overview" for "permission01".
  - Header:** Shows the permission set name "permission01" and buttons for "Find Settings...", "Clone", "Delete", "Edit Properties", and "Manage Assignments".
  - Breadcrumb:** "Permission Set Overview > Object Settings > Accounts".
  - Section:** "Accounts" with an "Edit" button.
  - Object Permissions:** A table showing permissions for the "Accounts" object.

| 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"/>            |
  - Section:** "Field Permissions" for the "Accounts" object.

| 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"/>            |

Salesforce

Home New Search Home

Assignments

Assignment Summary

| Subject   | Due Date | Topic To  | Score | Status |
|-----------|----------|-----------|-------|--------|
| Lightning | Today    | Marketing | 100   | Green  |
| Lightning | Today    | Marketing | 100   | Green  |

Actions

Add New

Remove

Print

Print Group

Salesforce

Home New Search Home

Assignments

Assignment Summary

| Subject   | Due Date | Topic To  | Score | Status |
|-----------|----------|-----------|-------|--------|
| Lightning | Today    | Marketing | 100   | Green  |
| Lightning | Today    | Marketing | 100   | Green  |

Actions

Add New

Remove

Print

Print Group

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

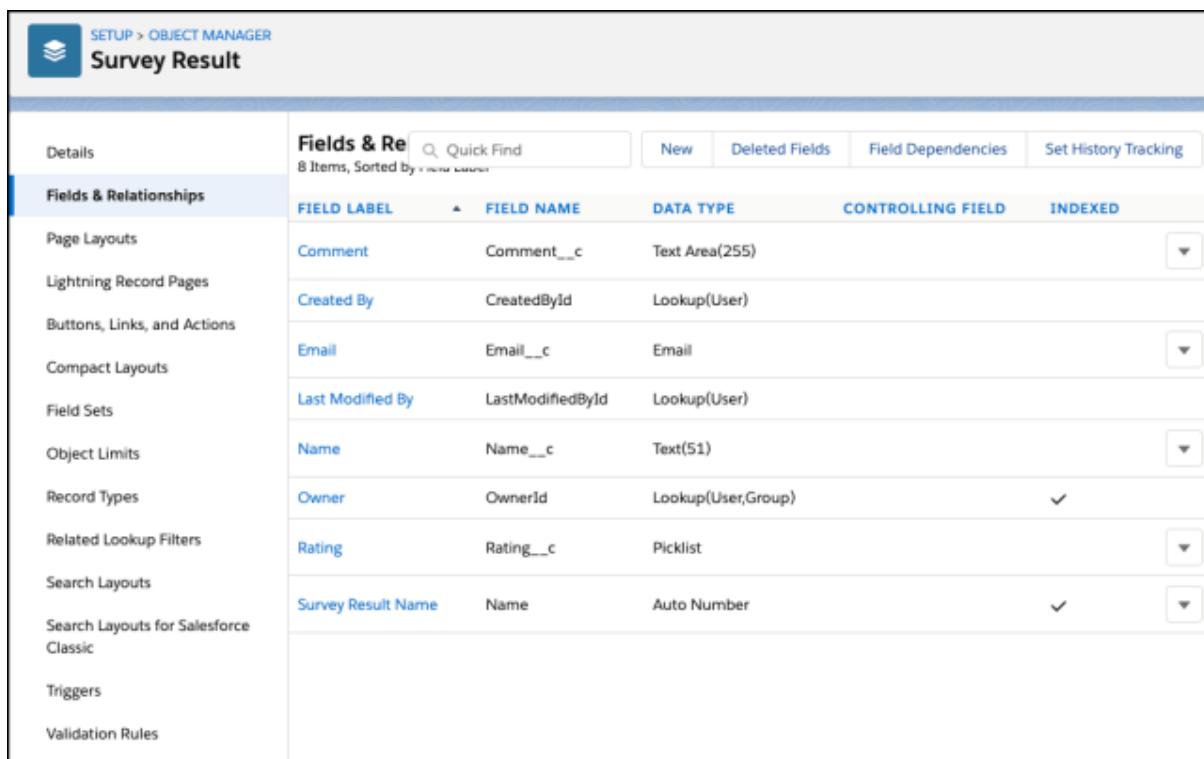
##### Step 1: Create a custom object

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 Salesforce Object Manager interface. At the top, there's a breadcrumb trail: SETUP > OBJECT MANAGER. Below it, the title "Survey Result" is displayed. On the left, a sidebar lists various setup categories: Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, Search Layouts for Salesforce Classic, Triggers, and Validation Rules. The main area is titled "Fields & Relationships" and contains a table with the following data:

| 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

The screenshot shows the 'Email Template' page in Salesforce. At the top, there's a header with the template name 'Thank You Email - Survey'. To the right are buttons for 'Edit in Builder', 'Edit', 'Clone', and more. Below the header, there are two tabs: 'Details' (which is selected) and 'Related'. Under the 'Information' section, there are fields for 'Email Template Name' (set to 'Thank You Email - Survey'), 'Description' (empty), 'Related Entity Type' (set to 'Survey Result'), 'Folder' (set to 'Public Email Templates'), and a checkbox 'Made in Email Template Builder' which is checked. In the 'Message Content' section, there are fields for 'Subject' (set to 'Thank You For Completing Our Survey!') and 'Enhanced Letterhead' (empty). The 'HTML Value' field contains the following content:

```
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
```

## 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.

Help for this Page ?

**Email Alert Edit**

**Edit Email Alert** |= Required Information

Description: Survey - Thank You Email

Unique Name: Survey\_Thank\_You\_Email [i](#)

Object: Survey Result

Email Template: Thank You Email - Survey [S](#)

Protected Component:

Recipient Type: Search: User  for:

**Recipients**

| Available Recipients  | Selected Recipients |
|---|---------------------|
| User: Integration User<br>User: Rakesh Gupta<br>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 [i](#)

Make this address the default From email address for this object's email alerts. [i](#)

## 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.

|  |  |
|--|--|
| <b>*Label</b><br><input type="text" value="Save Response"/>  | <b>*API Name</b><br><input type="text" value="Save_Response"/>                   |
| <b>Description</b><br><input type="text"/>   |  |
| <b>How Many Records to Create</b><br><input checked="" type="radio"/> One<br><input type="radio"/> Multiple  |  |
| <b>How to Set the Record Fields</b><br><input type="radio"/> Use all values from a record<br><input checked="" type="radio"/> Use separate resources, and literal values |  |
| <b>Create a Record of This Object</b>  |  |
| <b>*Object</b><br><input type="text" value="Survey Result"/>   |  |
| <b>Set Field Values for the Survey Result</b>  |  |
| <b>Field</b><br><input type="text" value="Comment__c"/>  | <b>Value</b><br><input type="text" value="A_a Comment X"/>                       |
| <b>Field</b><br><input type="text" value="Email__c"/>  | <b>Value</b><br><input type="text" value="A_a Email &gt; Value X"/>              |
| <b>Field</b><br><input type="text" value="Name__c"/>   | <b>Value</b><br><input type="text" value="={!Name.firstName} {!Name.lastName}"/> |
| <b>Field</b><br><input type="text" value="Rating__c"/>   | <b>Value</b><br><input type="text" value="A_a Rating X"/>                        |
| <input type="button" value="+ Add Field"/>   |  |
| <input type="checkbox"/> Manually assign variables   |  |
| <input type="button" value="Cancel"/> <input type="button" value="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  | * Flow API Name |                 |
| Survey  | Survey          |                 |
| Description   |                 |                 |
| <div style="height: 50px; border: 1px solid #ccc; margin-bottom: 5px;"></div>                               |                 |                 |
| <a href="#">Hide Advanced</a>   |                 |                 |
| How to Run the Flow <span style="color: #0070C0;">i</span>  |                 |                 |
| User or System Context—Depends on How Flow is Launched  |                 |                 |
| * Type  | Screen Flow     |                 |
| * API Version for Running the Flow  |                 |                 |
| 51  |                 |                 |
| Interview Label <span style="color: #0070C0;">i</span>  |                 |                 |
| <input type="text" value="Insert a resource..."/> <span style="float: right;">🔍</span>                      |                 |                 |
| Survey {!\$Flow.CurrentDateTime}  |                 |                 |
| <div style="height: 50px; border: 1px solid #ccc; margin-top: 10px;"></div>                                 |                 |                 |
| Last Modified   |                 |                 |
| 12/21/2020, 4:54 PM by Rakesh Gupta   |                 |                 |
| Status:   | Type:           | Version Number: |
| <span style="background-color: #0070C0; color: white; padding: 2px 5px; border-radius: 10px;">Active</span> | Screen Flow     | 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.

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

```

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