

Naan Mudhalvan Salesforce  
Developer (Course)  
Assignment no 1

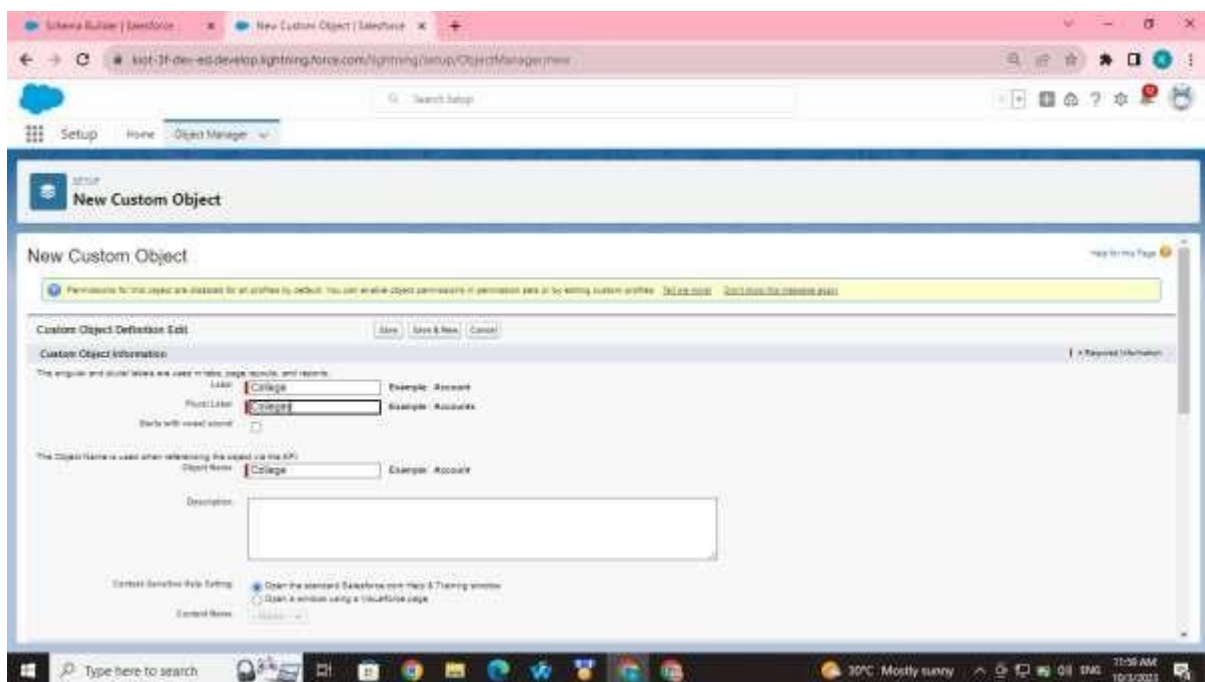
Name : Gopika P  
Naan Mudhalvan id : au611220205303  
Year & Dep : 4<sup>th</sup> year & IT  
Batch : 2024  
Zone no : Zone 8

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

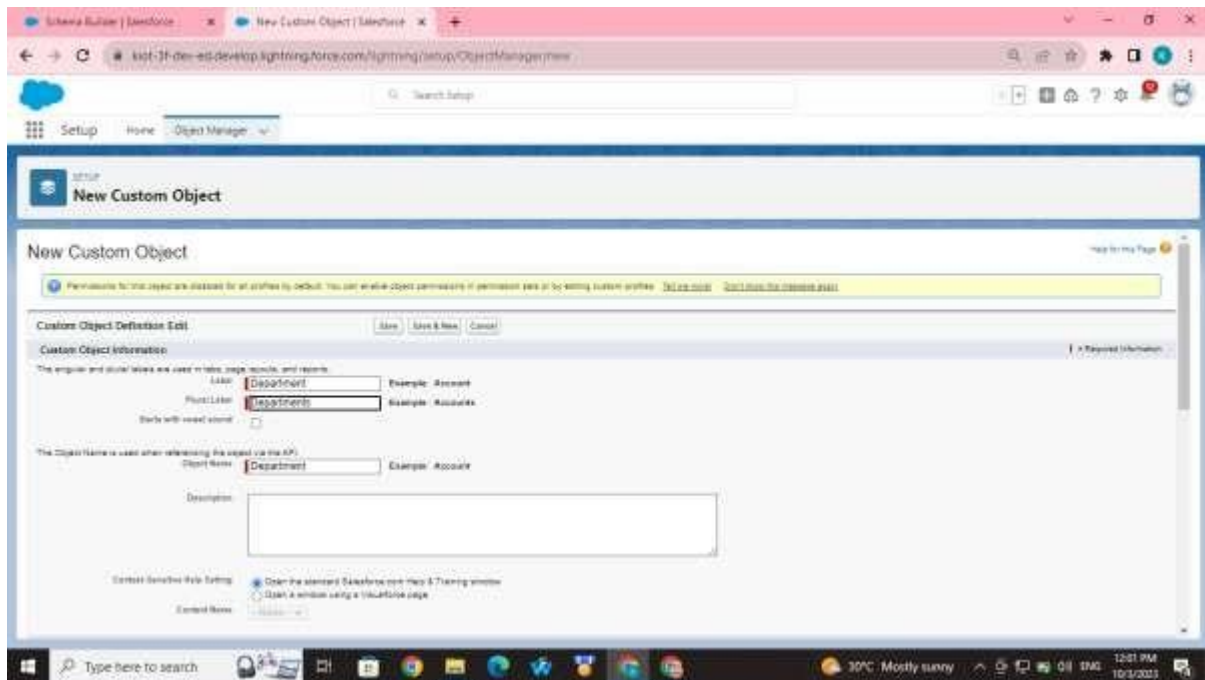
Solution:

Step 1: Create Custom Objects

Assuming you have two custom objects, let's call them "College" and "Department". If you haven't already created these objects, you can do so by going to Setup > Object Manager > Create > Custom Object.



Second custom objects, let's call them  
"Department"



## Step 2: Create a Master-Detail Relationship

To create a Master-Detail relationship between these two custom objects, follow these steps:

1. Go to Setup > Object Manager.
2. Click on "College" to open its settings.
3. In the left sidebar, click on "Fields & Relationships."
4. Click the "New" button to create a new custom field.
5. Choose "Master-Detail Relationship" as the data type.

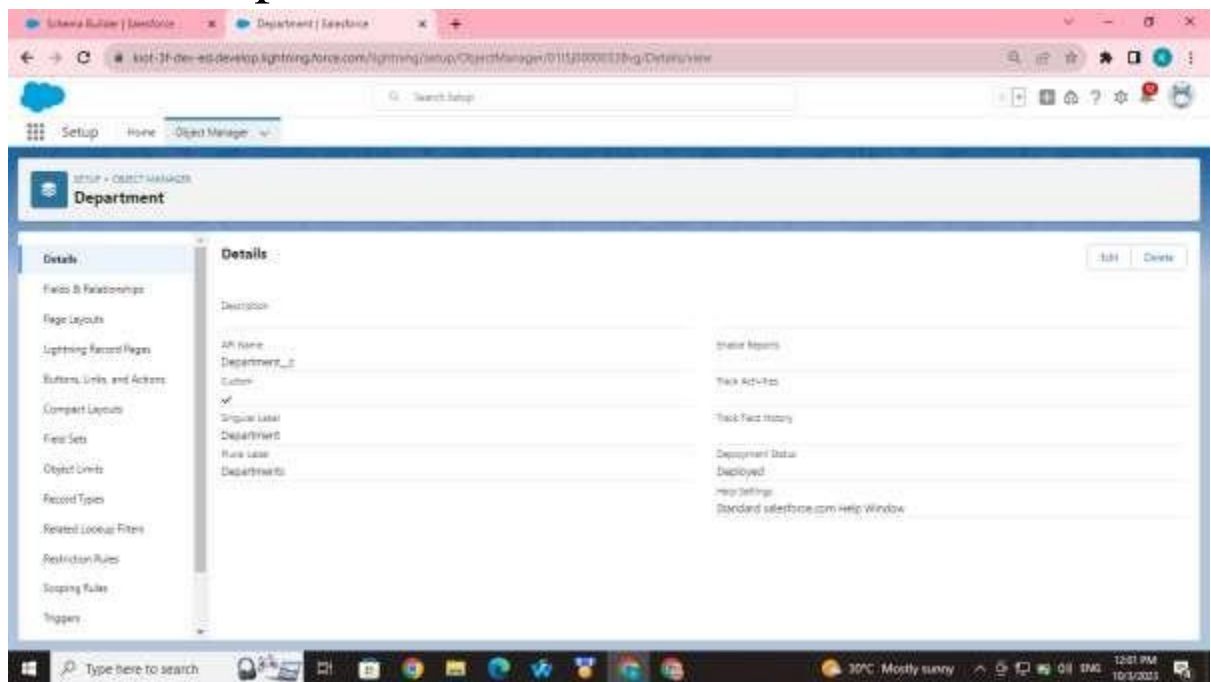
6. Enter a label for the relationship, e.g., "Department."

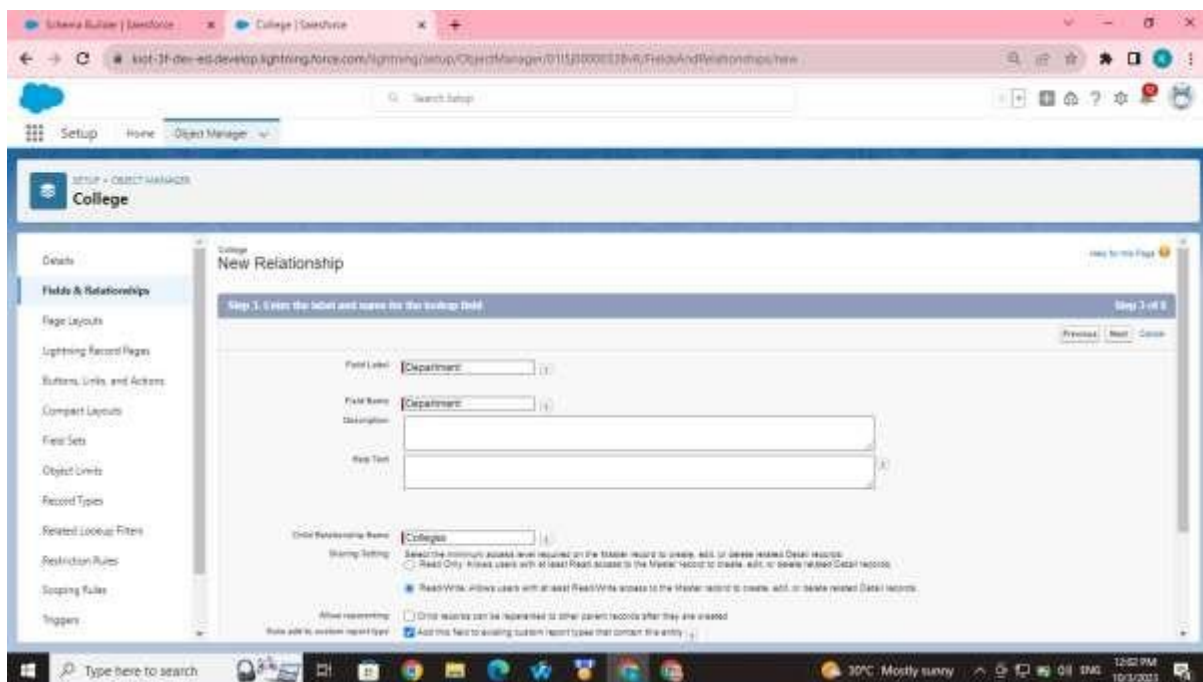
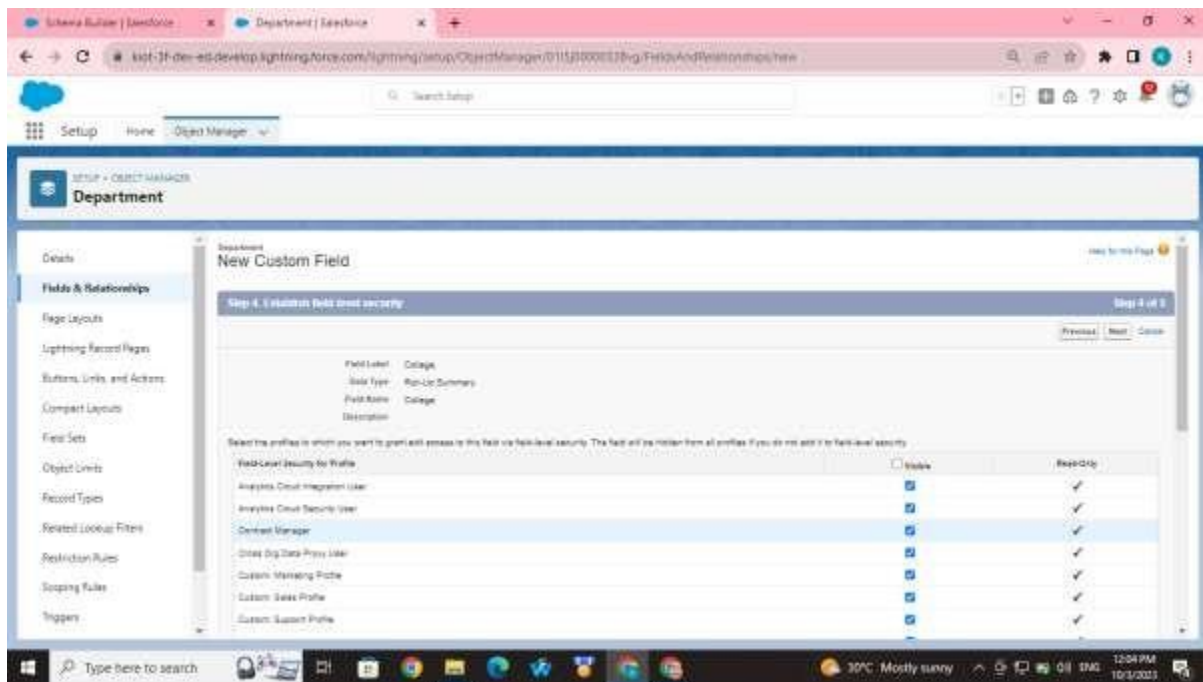
7. Choose " Department " as the related object.

8. Configure other settings as needed and click "Next."

9. Specify the field-level security and add it to relevant page layouts.

10. Click "Next" and "Save" to create the relationship.





## Step 3: Create the Roll-Up Summary Field

Now, let's create a Roll-Up Summary Field on the "College" to calculate the total number of related records in "Department":

- 1. Still on the "College" settings, go to "Fields & Relationships."**
- 2. Click the "New" button to create a new custom field.**
- 3. Choose "Roll-Up Summary" as the data type.**
- 4. Enter a label for the field, e.g.,**
- 5. Choose "Count" as the Roll-Up Type.**
- 6. Select " Department" as the object to roll up information from.**
- 7. Specify the filter criteria if you want to filter the related records.**
- 8. Configure other settings as needed and click "Next."**
- 9. Specify the field-level security and add it to relevant page layouts.**
- 10. Click "Next" and "Save" to create the Roll-Up Summary Field.**

Schema Builder | Salesforce

Department | Salesforce

last-3f-dee-ed-develop.lightning.force.com/lightning/setup/ObjectManager/011500000339vg:FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Fields & Relationships

5 Items. Sorted by First Label.

Quick Test

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
College	College__c	Roll-Up Summary (COUNT College)		
Created By	CreatedBy	Lookup(User)		
Department Name	Name	Text(80)		
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User Group)		

Type here to search

30°C Mostly sunny

12:25 PM 10/3/2023

Schema Builder | Salesforce

Tabs | Salesforce

last-3f-dee-ed-develop.lightning.force.com/lightning/setup/CustomTabs/page/address=/%2FobjectCustomTabWizard.jsp%3FretURL=%2F%2F%2F

Search Setup

Setup Home

Quick Test

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

Data

Email

PLATFORM TOOLS

Subscription Management

Apps

Feature Settings

Setup

Tabs

New Custom Object Tab

Help for this Page

Step 1 of 3

Step 1: Enter the Details

Choose the custom object for this new custom tab. Fill in other details.

Select an existing custom object or [create a new custom object here](#).

Object: book

Tab Style: Standard

(Optional) Choose a Home Page Custom Link to show as a splash page the first time you users visit on this tab.

Select Page Custom Link: Home

Enter a short description.

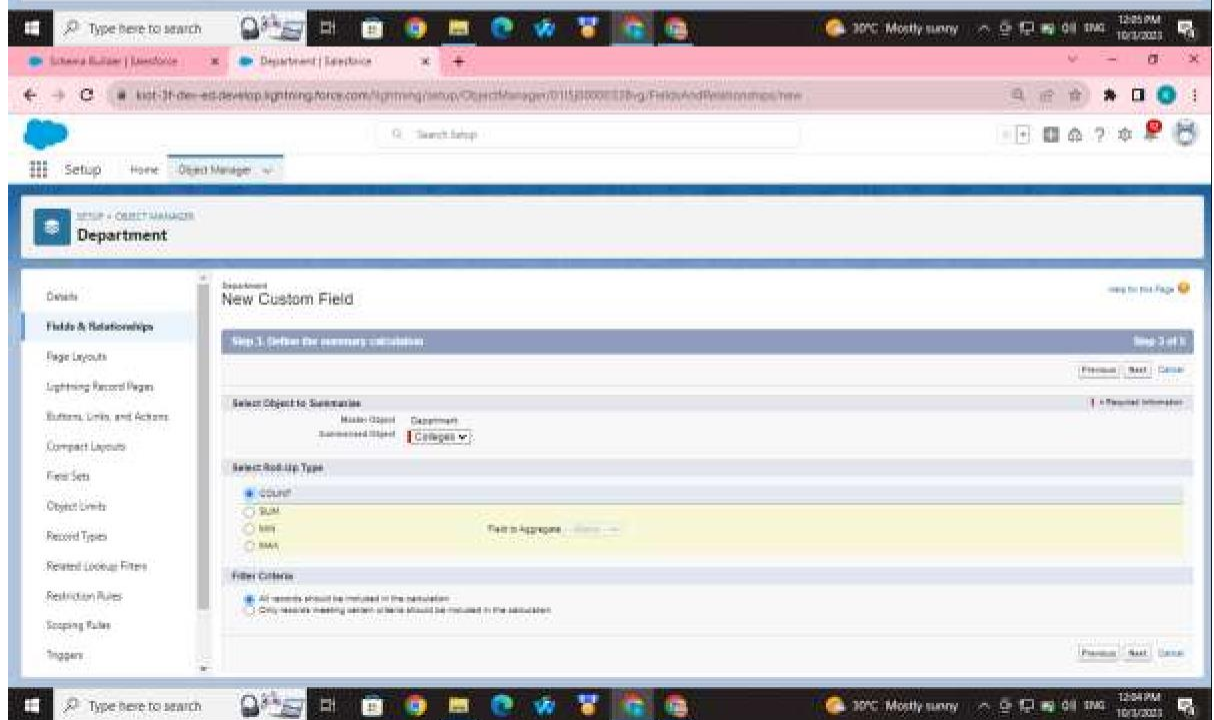
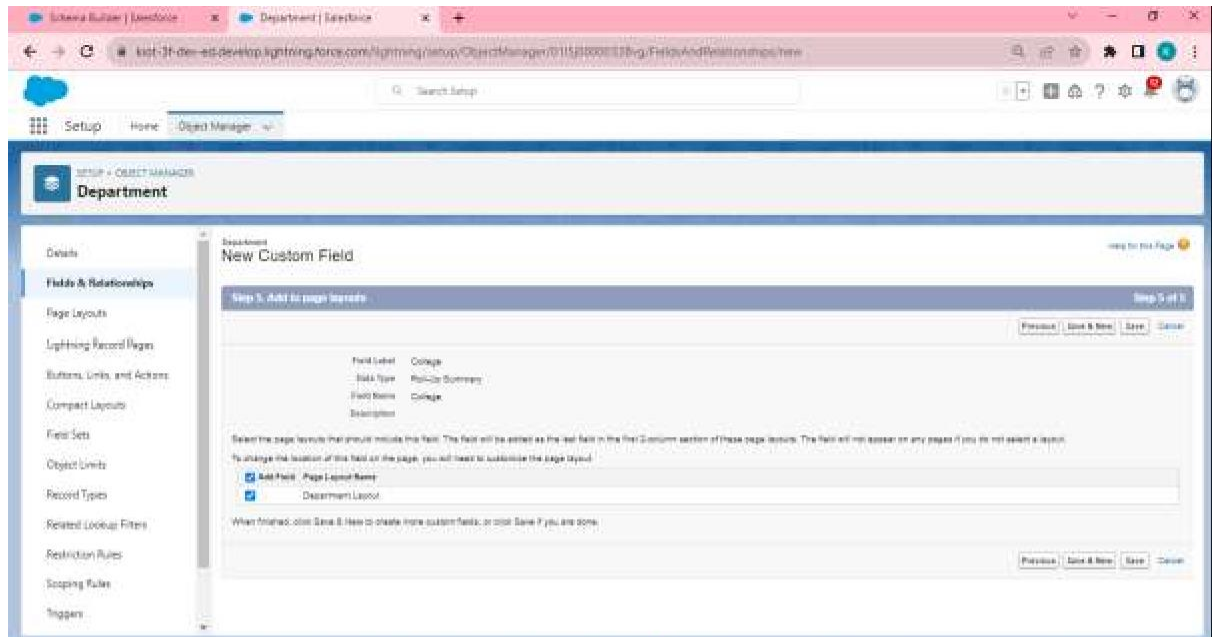
Description:

Save Cancel

Type here to search

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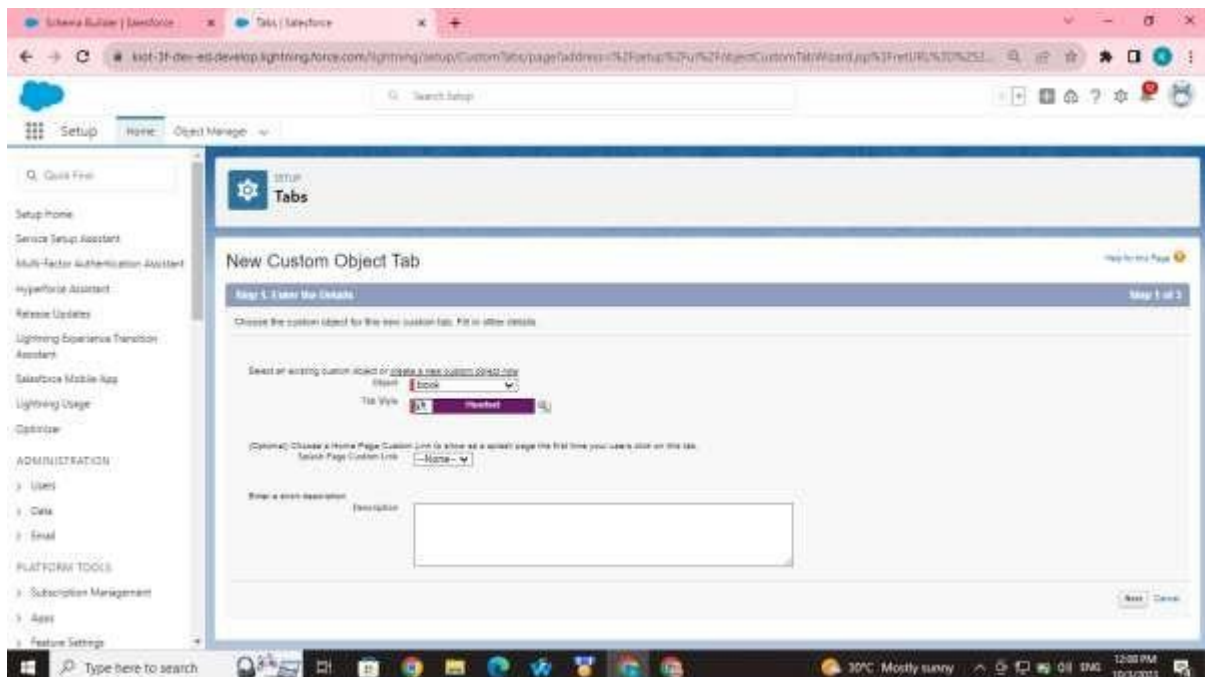
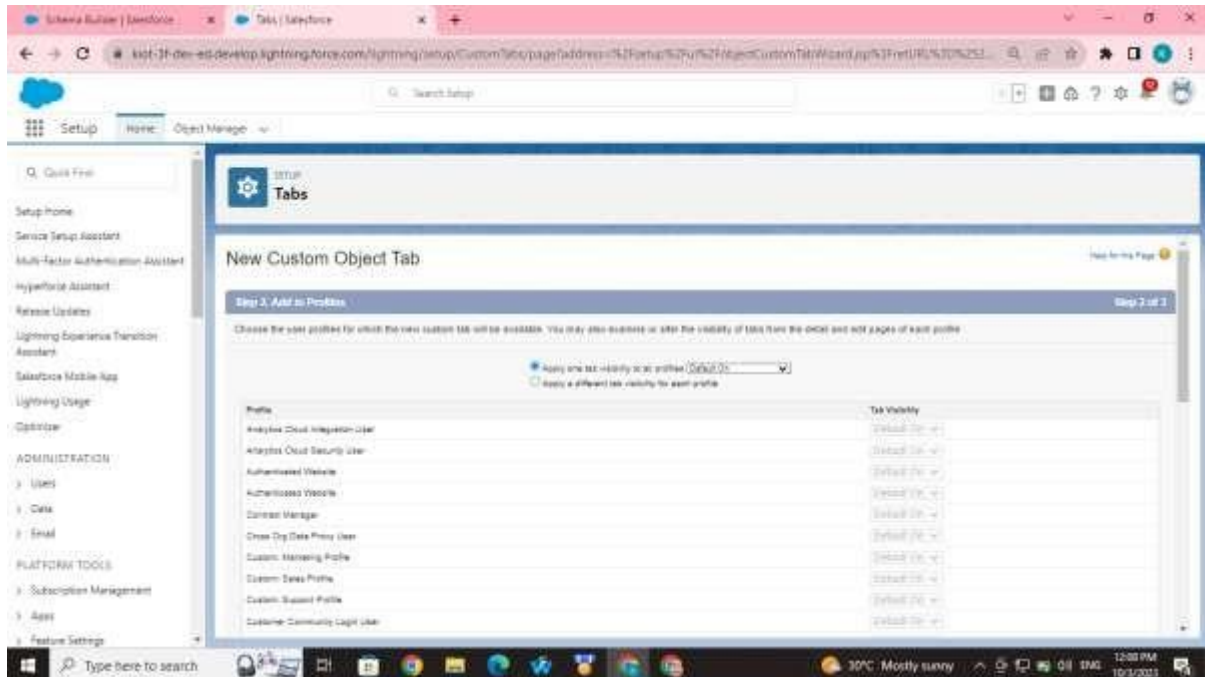






10. Assign the app to users or profiles.

11. Test the app with the assigned users.



Schwarz Butler | Salesforce x Tab | Salesforce

ssot-3f-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page/address=0%2FSetup%2FSetup%2FSetupCustomTabWizard.jsp%3FPreURL%3D%252F

Search Setup

Setup Home Object Manager

Quick Find

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

Data

Email

PLATFORM TOOLS

Subscription Management

Apps

Feature Settings

Setup Tabs

Step 3 of 3: Add to Custom Apps

Choose the custom apps for which the new custom tab will be available. You may also restrict or alter the visibility of tabs from the detail and edit pages of each Custom App.

Custom App	Include Tab
Platform (standard__Platform)	<input checked="" type="checkbox"/>
Sales (standard__Sales)	<input checked="" type="checkbox"/>
Service (standard__Service)	<input checked="" type="checkbox"/>
Marketing (standard__Marketing)	<input checked="" type="checkbox"/>
Service Console (standard__ServiceConsole)	<input checked="" type="checkbox"/>
High Volume Customer Portal User	<input checked="" type="checkbox"/>
Authenticated Mobile User	<input checked="" type="checkbox"/>
App Launcher (standard__AppLauncher)	<input checked="" type="checkbox"/>
Community (standard__Community)	<input checked="" type="checkbox"/>
The Vault (standard__Vault)	<input checked="" type="checkbox"/>
Experience Builder (standard__ExperienceBuilder)	<input checked="" type="checkbox"/>
Content (standard__Content)	<input checked="" type="checkbox"/>
Analytics Studio (standard__AnalyticsStudio)	<input checked="" type="checkbox"/>
Data (standard__Data)	<input checked="" type="checkbox"/>

Type here to search

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12:00 PM 10/1/2021

Schwarz Butler | Salesforce x App Manager | Salesforce

ssot-3f-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenu/home

Search Setup

Setup Home Object Manager

Apps

AppExchange Marketplace

Connected Apps

Manage Connected Apps

Lightning Bolt

Flow Category

Lightning Bolt Solutions

Mobile Apps

Salesforce

Salesforce Earning

Salesforce Navigation

Salesforce Notifications

Salesforce Offline

Salesforce Settings

Feature Settings

Setup Lightning Experience App Manager

New Lightning App New Connected App

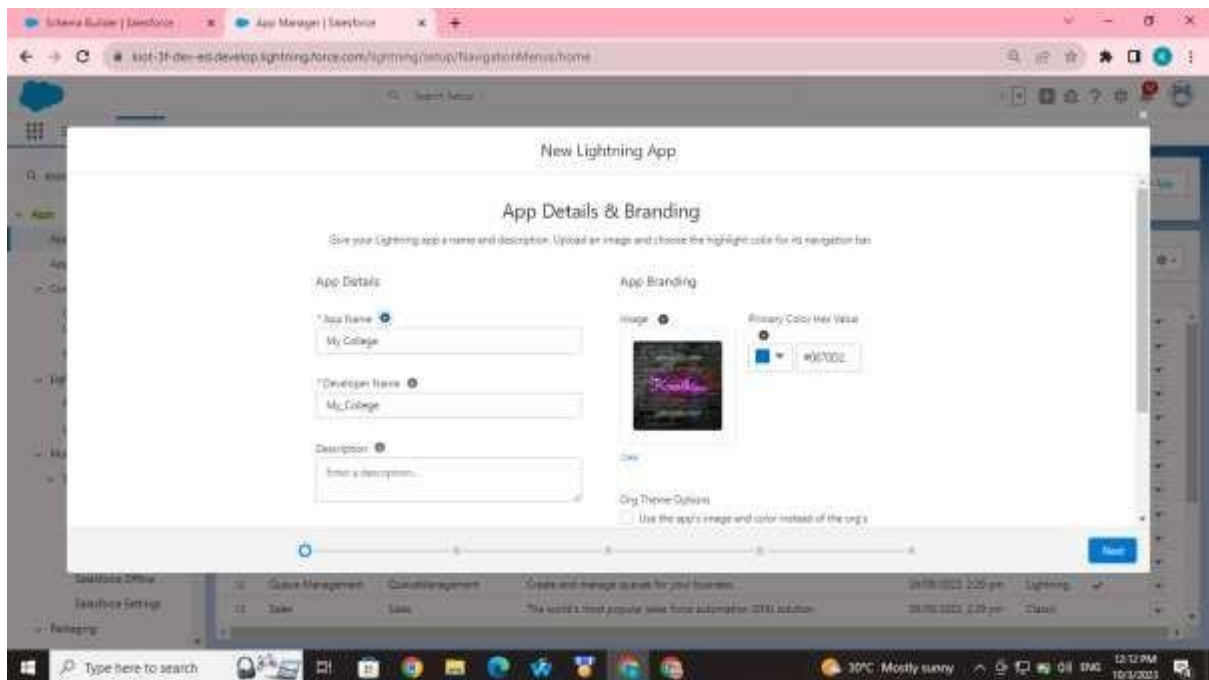
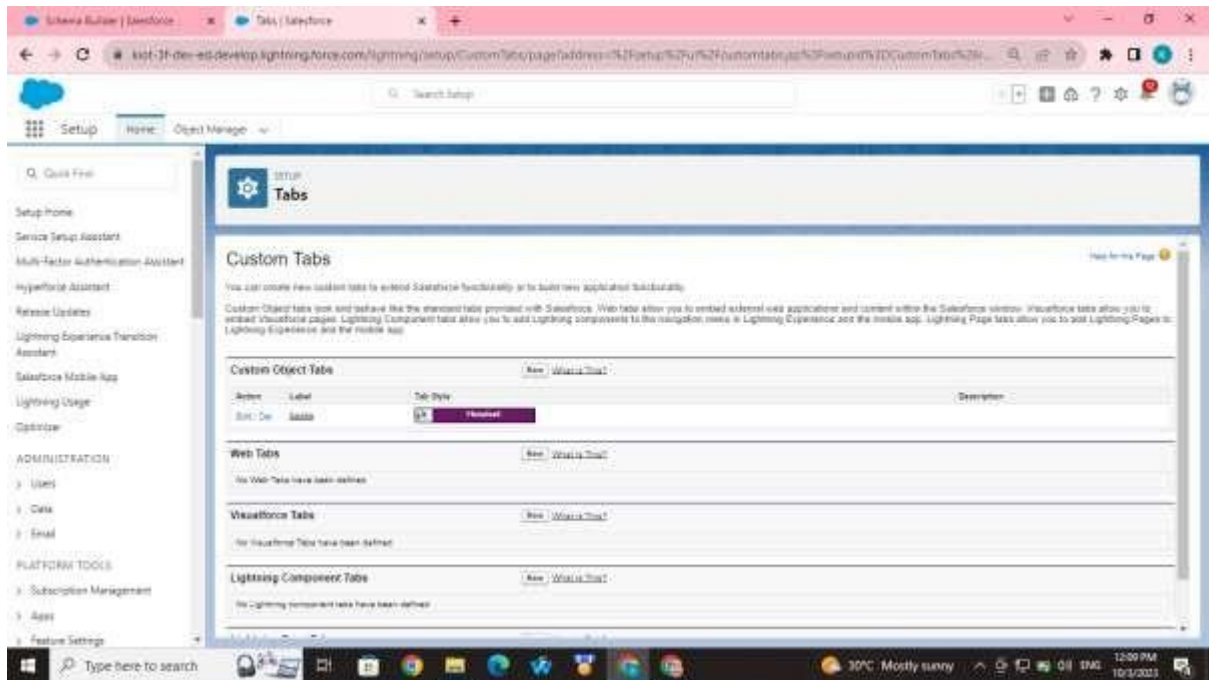
21 items - Sorted by App Name - Filtered by All app menu items - Tablet Type

App Name	Developer Name	Description	Last Modified D...	App T...	Vis...
All Tabs	AdHocSet		28/09/2021, 2:29 pm	Class	
Analytics Studio	Insights	Build CRM Analytics dashboards and apps	25/09/2021, 2:29 pm	Class	✓
App Launcher	AppLauncher	App Launcher tabs	25/09/2021, 2:29 pm	Class	✓
Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry	25/09/2021, 2:29 pm	Lightning	✓
Community	Community	Salesforce CRM Communities	28/09/2021, 2:29 pm	Class	✓
Content	Content	Salesforce CRM Content	25/09/2021, 2:29 pm	Class	✓
Data Manager	DataManager	Use Data Manager to view trends, monitor usage, and manage scripts	25/09/2021, 2:29 pm	Lightning	✓
Digital Experiences	SalesforceDX	Manage content and media for all of your sites	25/09/2021, 2:29 pm	Lightning	✓
Lightning Usage App	LightningUsageApp	View Adoption and Usage Metrics for Lightning Experience	28/09/2021, 2:29 pm	Lightning	✓
Marketing	Marketing	Next-in-class on-demand marketing automation	25/09/2021, 2:29 pm	Class	✓
Platform	Platform	The fundamental Lightning Platform	25/09/2021, 2:29 pm	Class	✓
Queue Management	QueueManagement	Create and manage queues for your business	25/09/2021, 2:29 pm	Lightning	✓
Sales	Sales	The world's most popular sales force automation (SFA) solution	28/09/2021, 2:29 pm	Class	✓

Type here to search

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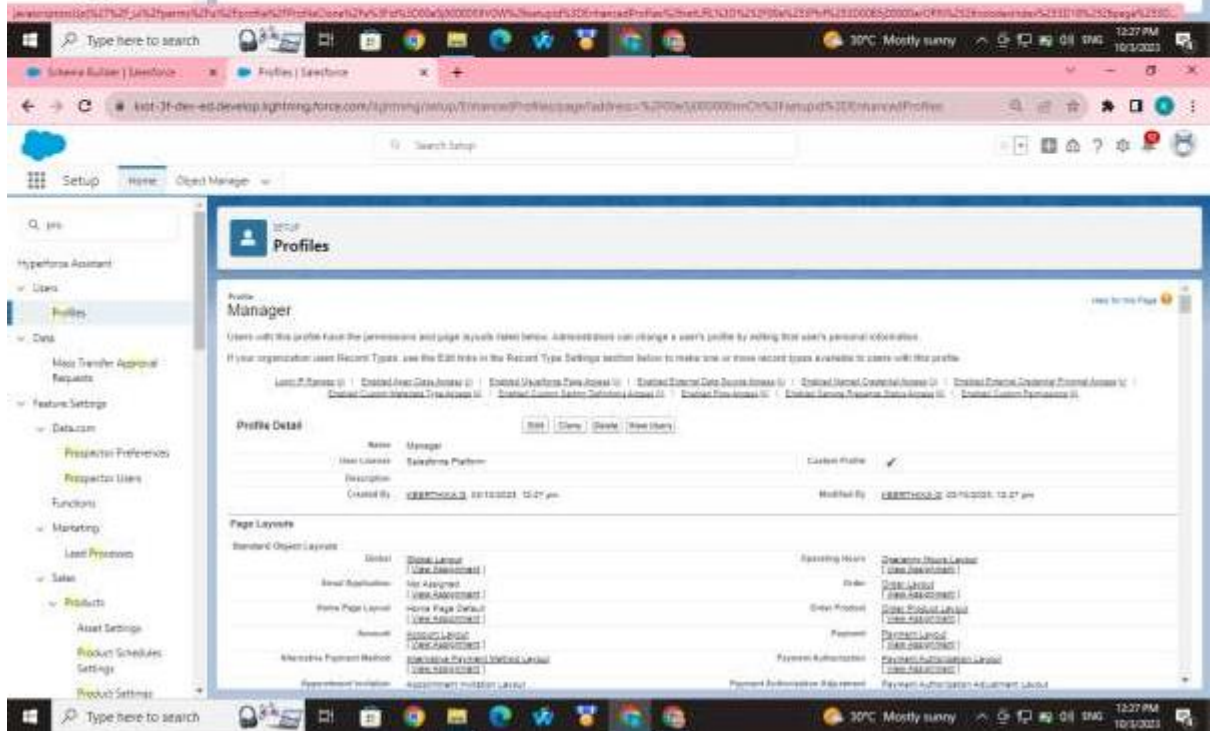
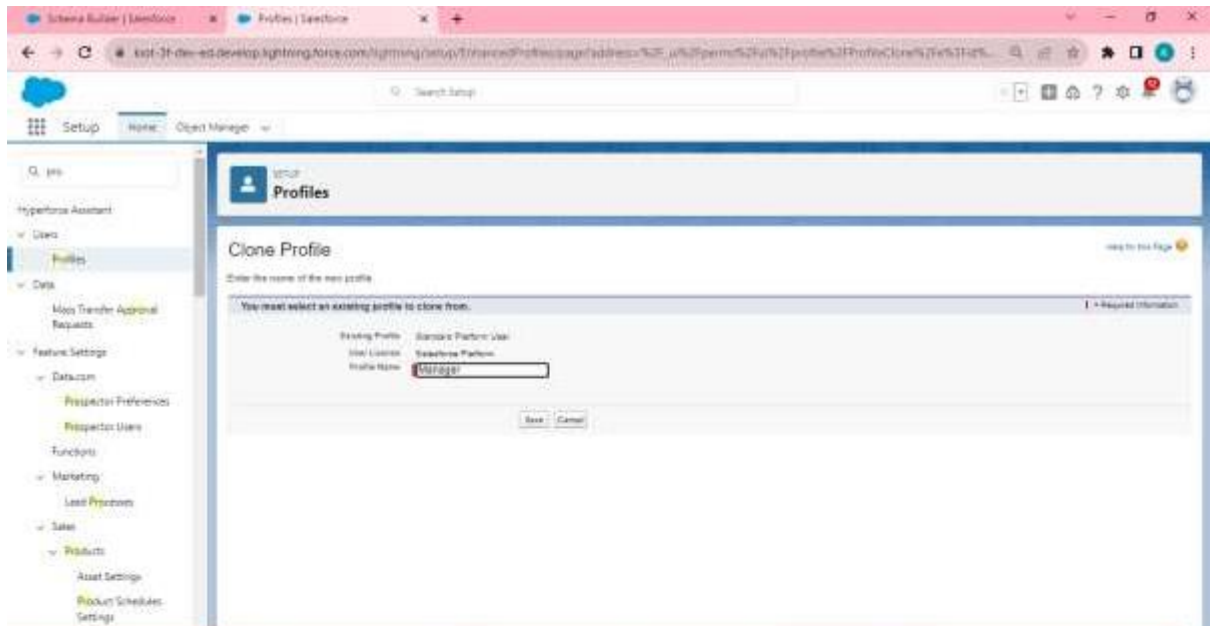
12:00 PM 10/1/2021

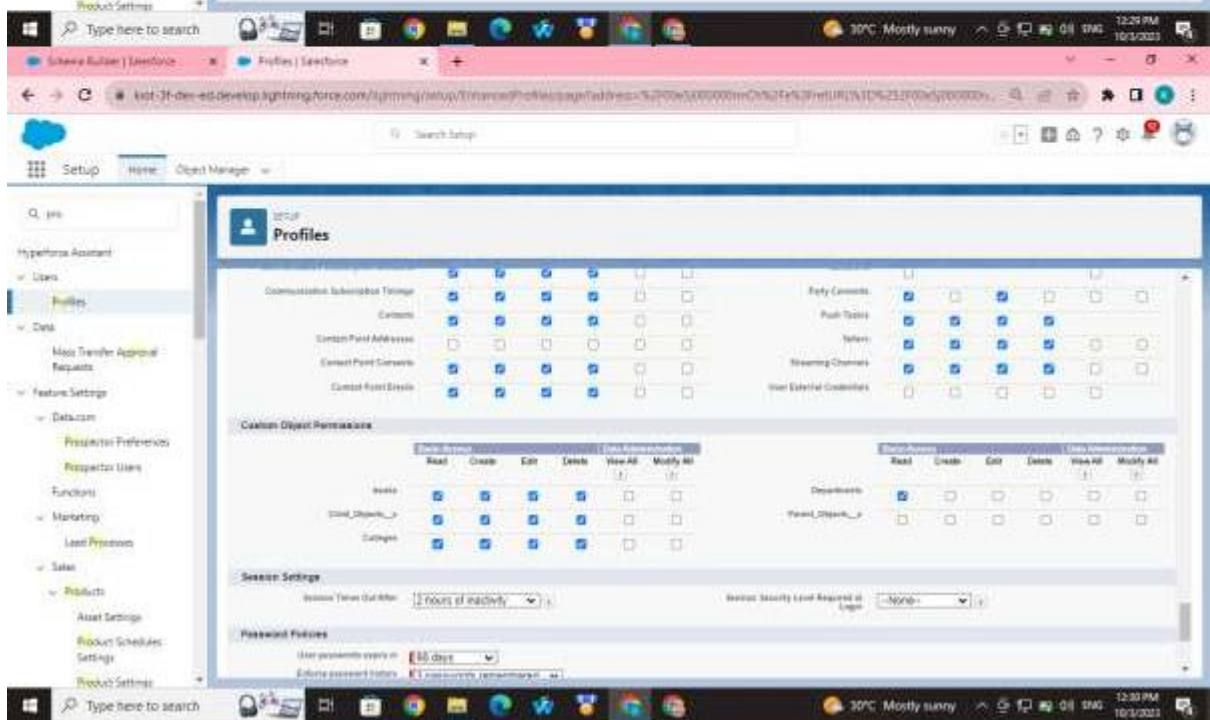
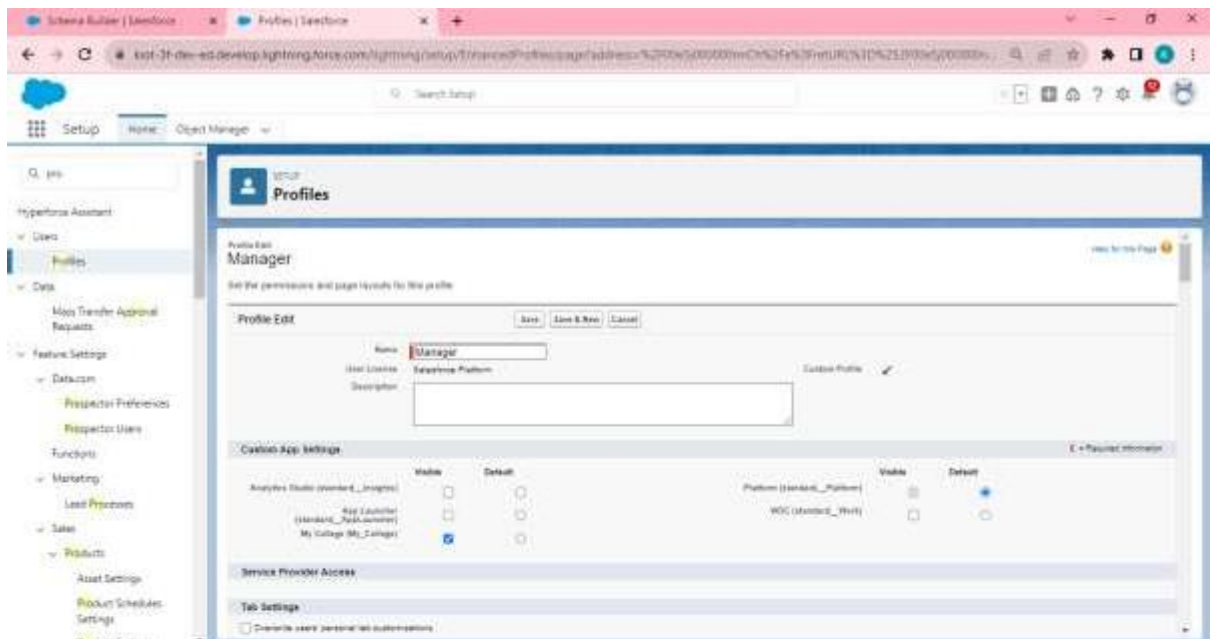


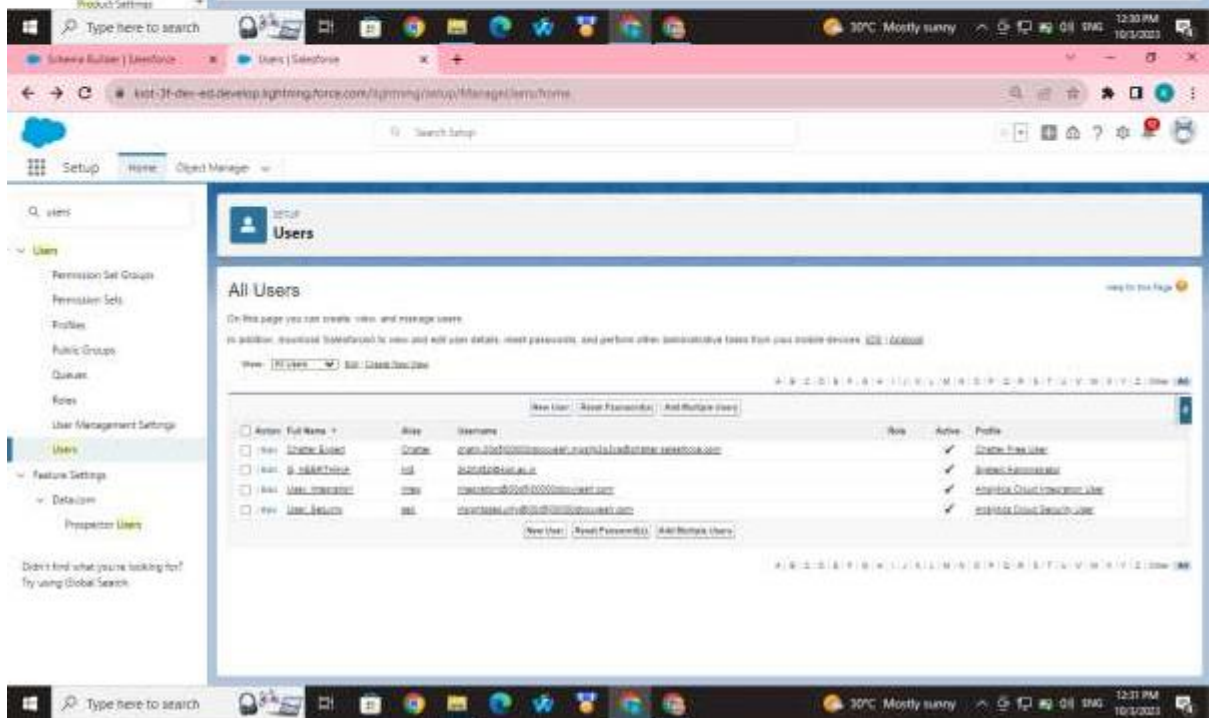
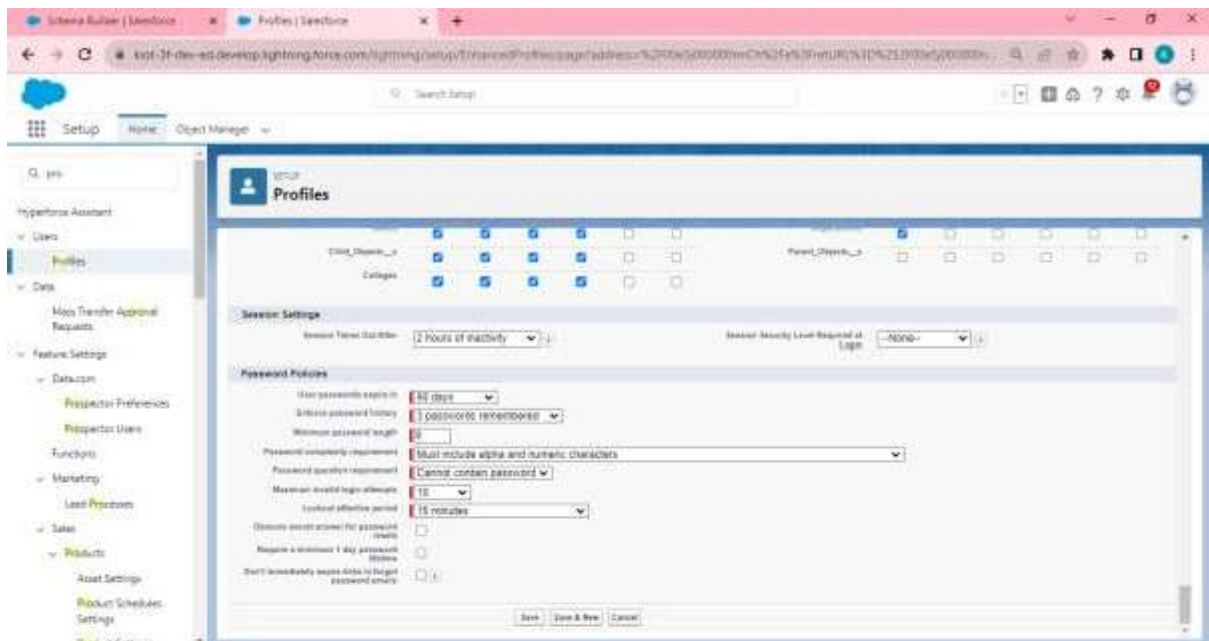
**Solution:**

The screenshot shows the Salesforce Setup interface. The left sidebar contains the Setup menu with options like Users, Profiles, Roles, and more. The 'Profiles' section is selected. The main content area shows a list of profiles, including 'Standard Profile' and 'Standard Profile User'. The 'Standard Profile User' profile is highlighted, showing its settings for various Salesforce features.

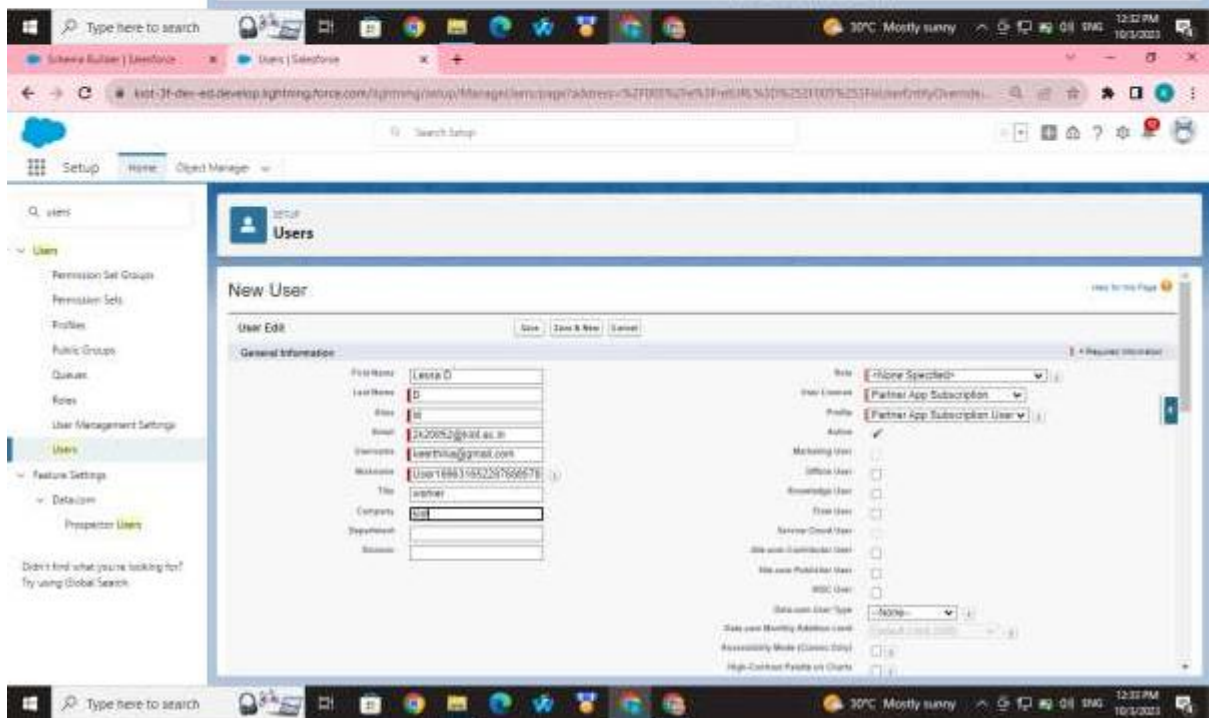
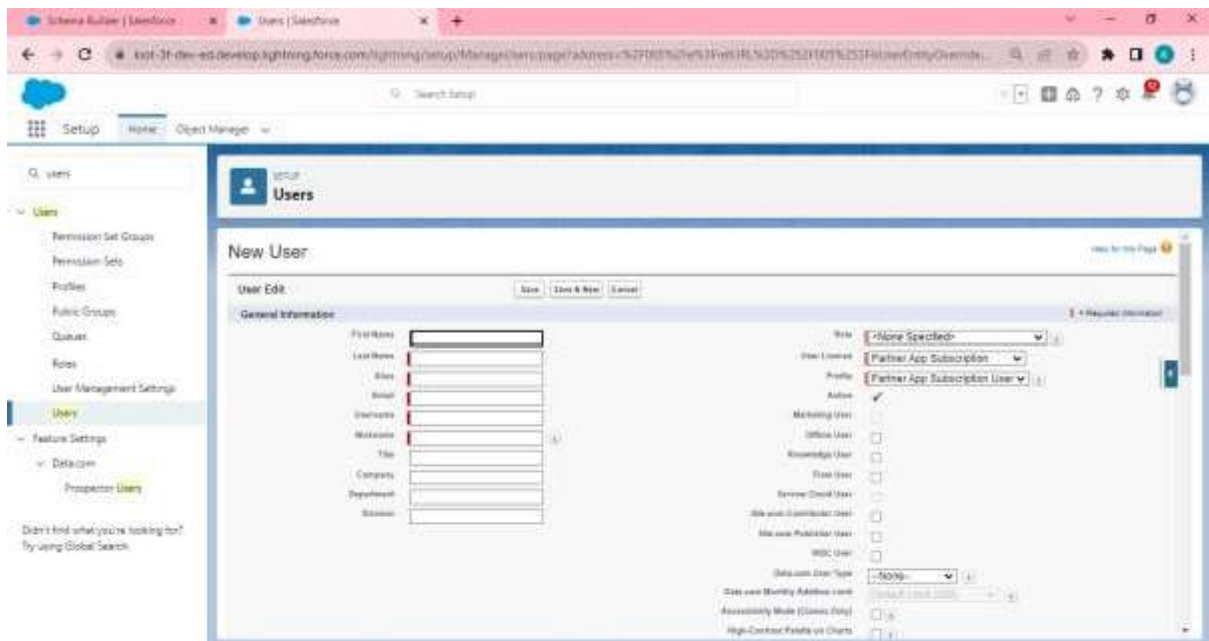












Screenshot of the Salesforce Users page in a web browser. The browser tabs show "Schema Builder | Salesforce", "Users | Salesforce", and "Jaysa (3148) - 2420528444...". The address bar shows a URL starting with "test-31-dev-ed.develop.lightning.force.com".

The Salesforce interface shows the "Users" section. The user "Jaysa A" is selected. The "User Detail" section displays the following information:

- Name: jaysa A
- Email: ja
- Username: jaysa@kko.ac.jp
- Nickname: User-18601711230471058032
- Title:
- Company:
- Department:
- Address:
- Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata)
- Locale: English (India)
- Language: English
- Designated Resource:
- Manager:
- Recent Approval Request Entry: Only if I am an approver

The "Role" section on the right lists various roles, including "Partner App Subscription", "Partner App Subscription User", "Admin", "Marketing User", "Offline User", "Knowledge User", "Flow User", "Service Cloud User", "Info.com Contributor User", "Info.com Publisher User", "B2C User", "Mobile Push Notification", "Data.com User Type", "Accessibility Mode (Screen Only)", and "Setup Mode".

Screenshot of a Gmail inbox showing an email from "support@salesforce.com". The email subject is "Welcome to Salesforce! Verify". The email content includes the Salesforce logo and the text "Welcome to Salesforce!".

The email body contains the following information:

- Click below to verify your account.
- Verify Account button.
- To easily log in later, save this URL: <https://test-31-dev-ed.develop.my.salesforce.com>
- Username: [jaysa@kko.ac.jp](mailto:jaysa@kko.ac.jp)
- Again, welcome to Salesforce!

The Gmail interface shows the "Compose" button and the "Inbox" list with 3,148 items. The "Labels" section is also visible.

Change Your Password

Enter a new password for keethi@klor.ac.in. Make sure to include at least:

- 8 characters
- 1 letter
- 1 number

\* New Password

\_\_\_\_\_ Good

\* Confirm New Password

\_\_\_\_\_ Match

Security Question

+ What is your pet's name?

\* Answer

jk

Change Password

Password was last changed on 03/10/2023, 12:42 pm.

salesforce

Username

keethi@klor.ac.in

Password

.....

Log In

☒ Remember me

[Forgot Your Password?](#) [Use Custom Domain](#)


[Not a customer?](#) [Try for Free](#)

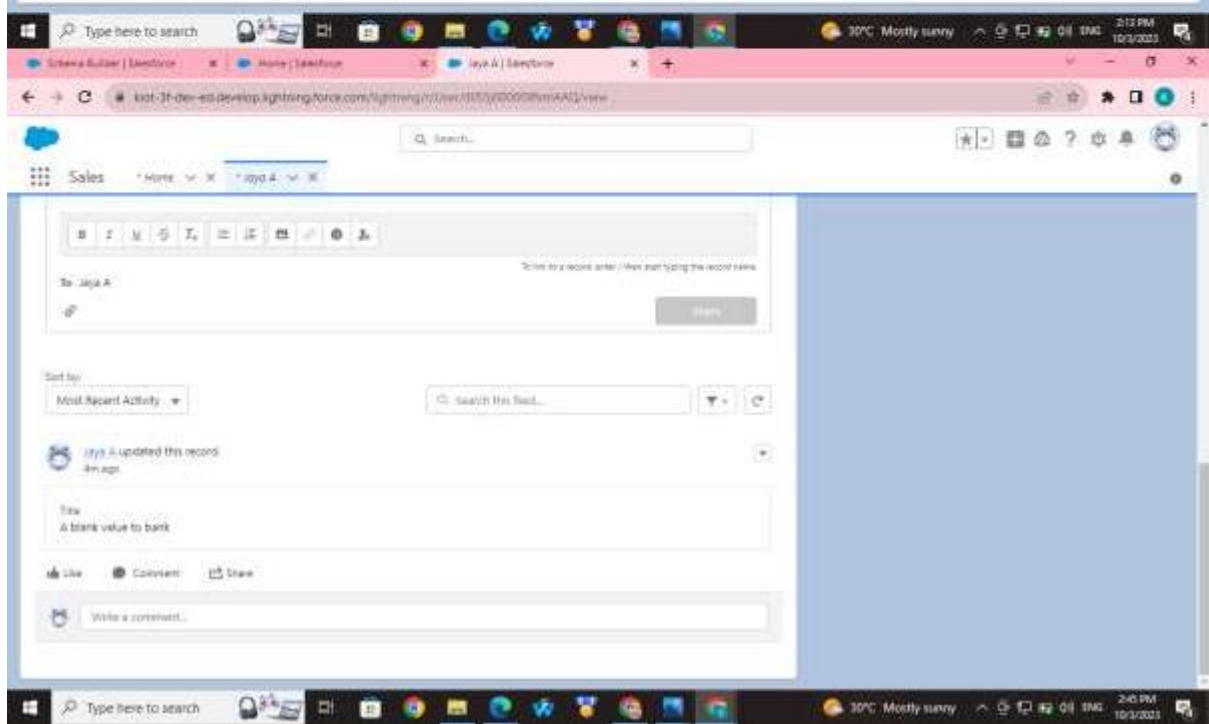
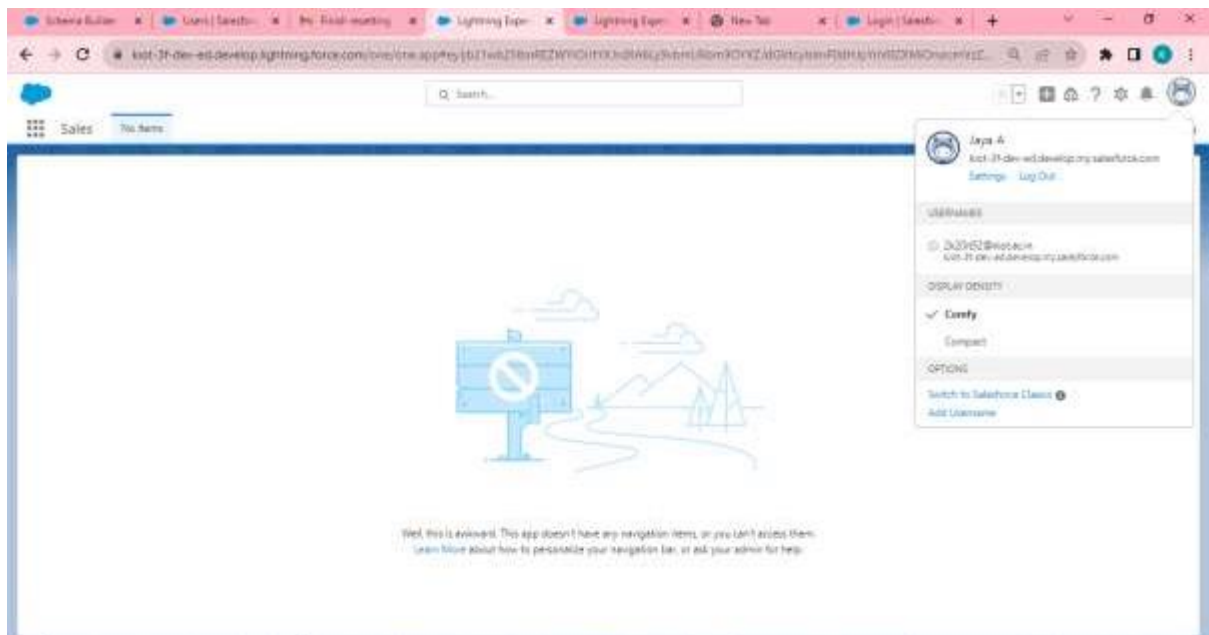
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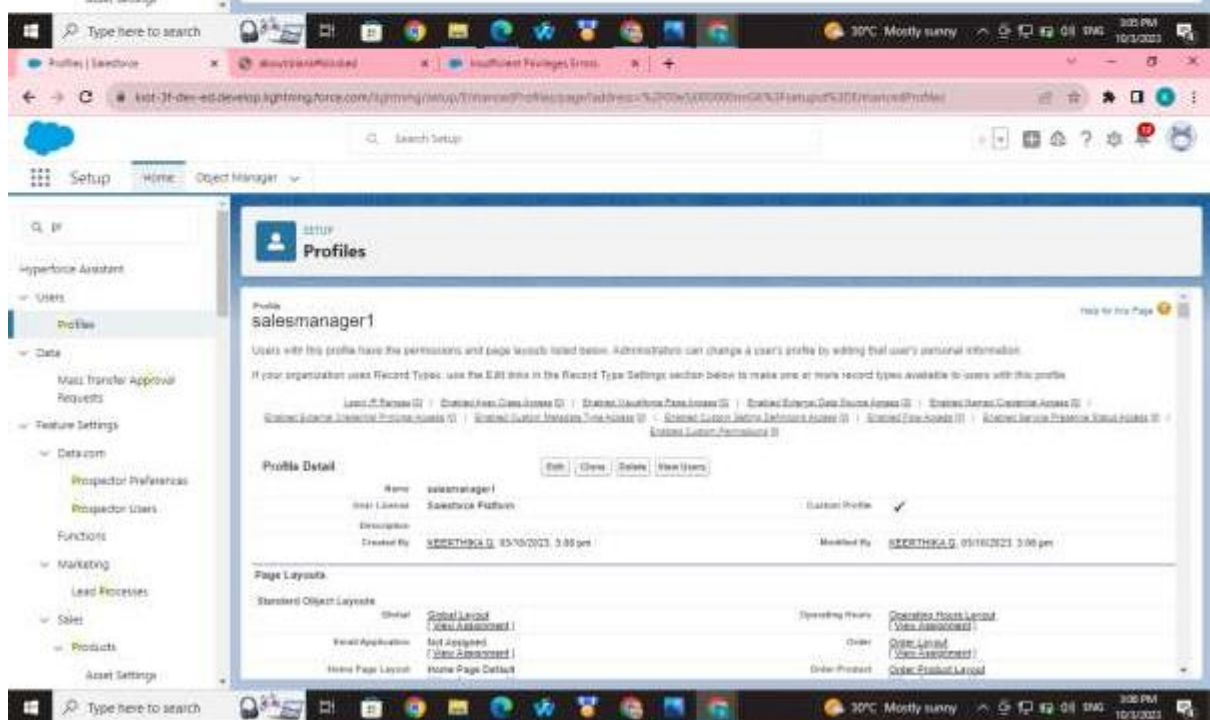
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Setup Home Object Manager

Hyperforce Assistant

Users

Profiles

Data

Mass Transfer Approval Requests

Feature Settings

Data.com

Prospector Preferences

Prospector Users

Functions

Marketing

Lead Processes

Sales

Products

Asset Settings

### SETUP Profiles

Profile Edit salesmanager1

Get the permissions and page layouts for this profile.

Profile Edit Save Save & New Cancel

Name salesmanager1

User License Salesforce Platform

Description

Custom Profile ☒

#### Custom App Settings

Value Default

Analytics Studio (Standard__SetupPM)	<input type="checkbox"/>	<input type="radio"/>
App Launcher (Standard__AppLauncher)	<input type="checkbox"/>	<input type="radio"/>
My College (My_College)	<input checked="" type="checkbox"/>	<input type="radio"/>

Platform (Standard\_\_Platform) ☒ ☐

WDC (Standard\_\_Wdc) ☐ ☐

Service Provider Access

Profiles | Salesforce

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Products

Asset Settings

### SETUP Profiles

Profile Edit salesmanager1

Get the permissions and page layouts for this profile.

Profile Edit Save Save & New Cancel

Name salesmanager1

User License Salesforce Platform

Description

Custom Profile ☒

#### Custom Object Permissions

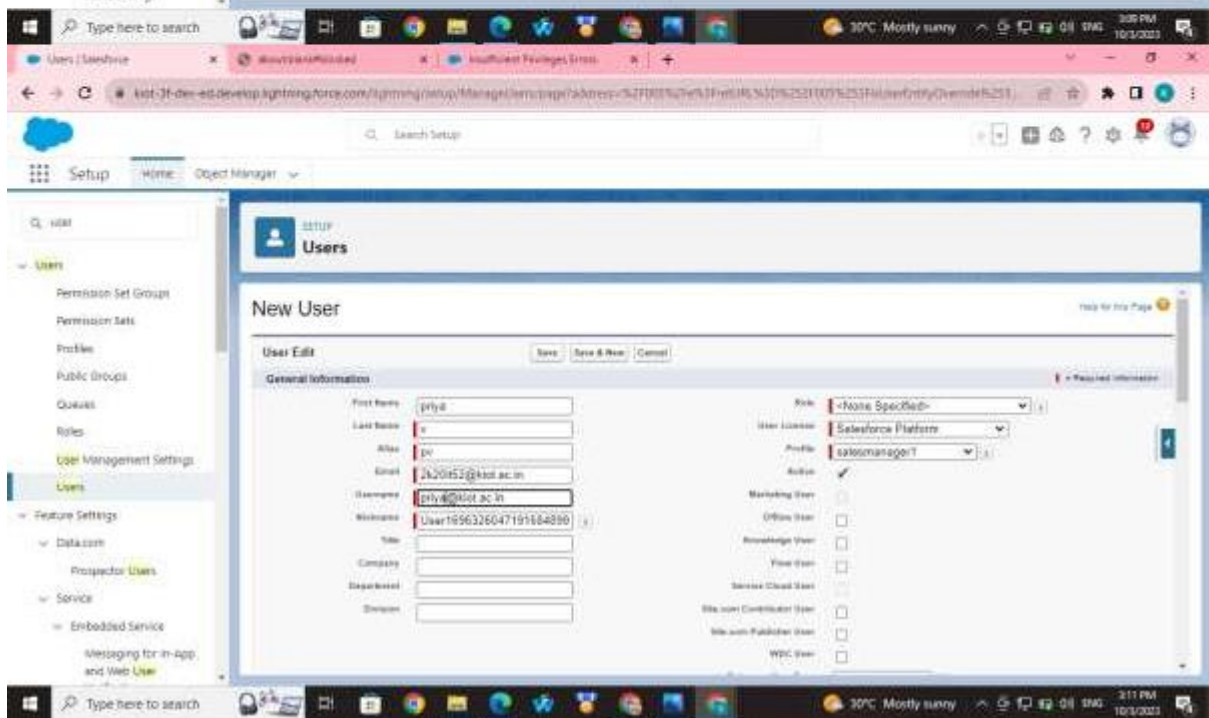
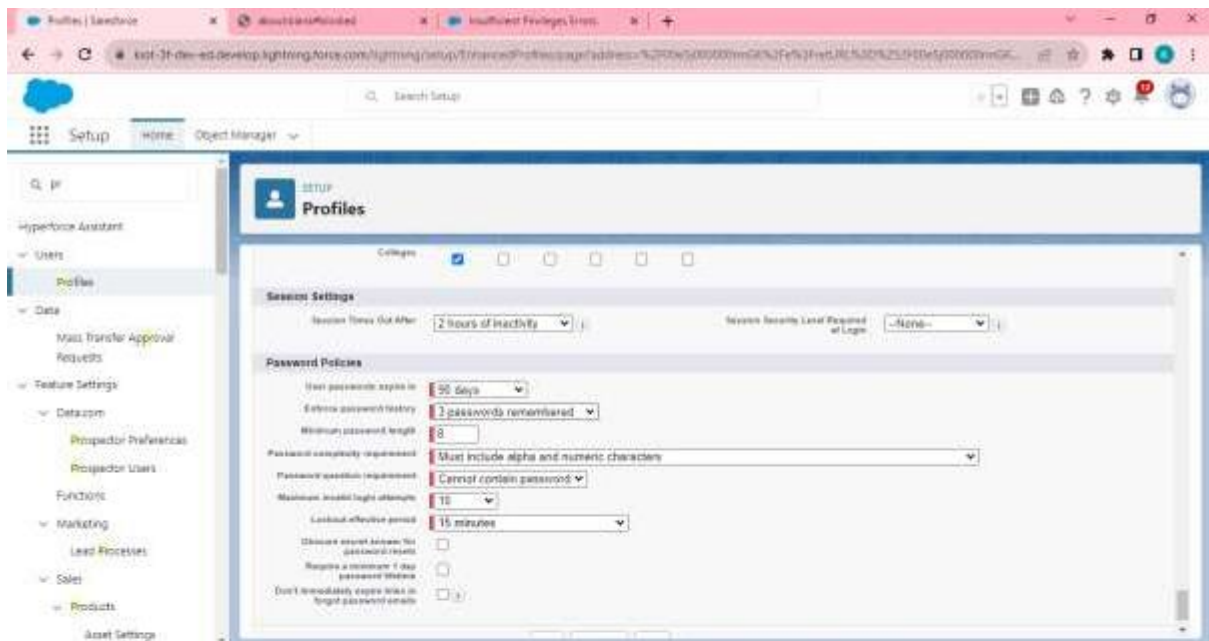
	Object Access				Field Access		Record Access				Field Administration	
	Read	Create	Edit	Delete	View All	Modify All	Read	Create	Edit	Delete	View All	Modify All
Accounts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Case_Objects__c	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Colleges	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contacts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Custom Field Emails	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Custom Field Addresses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Custom Field Contacts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Custom Field Emails	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Departments	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Parent_Objects__c	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

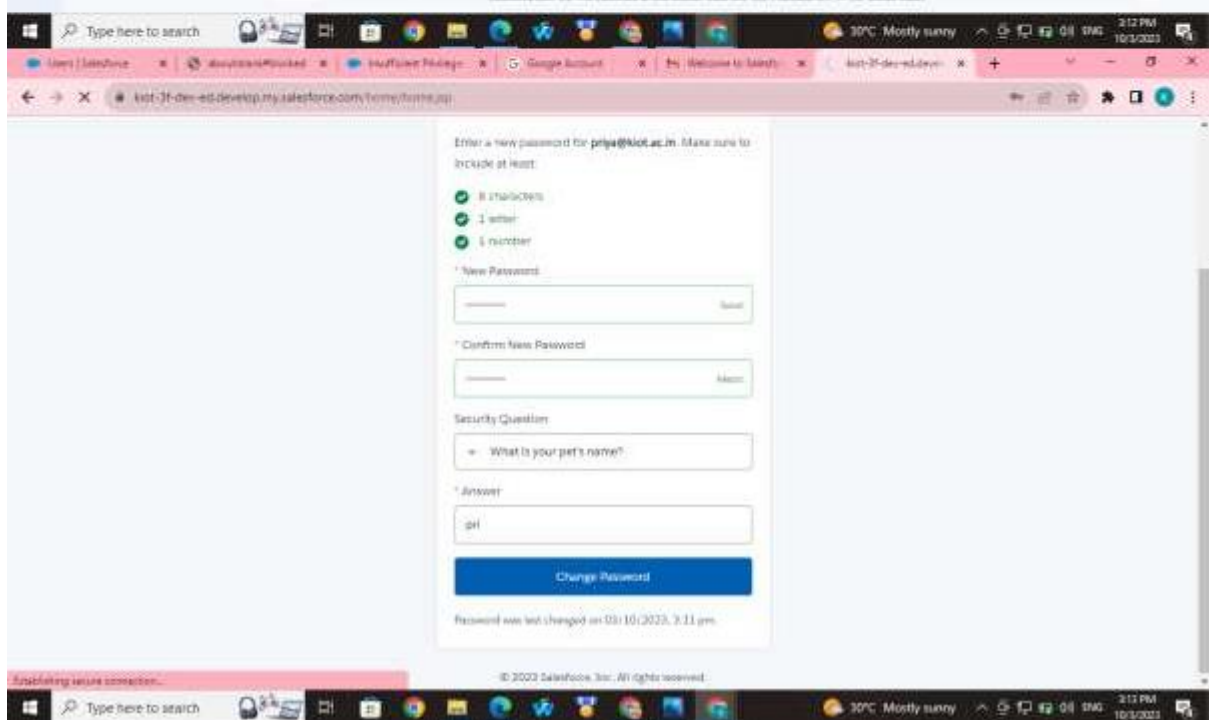
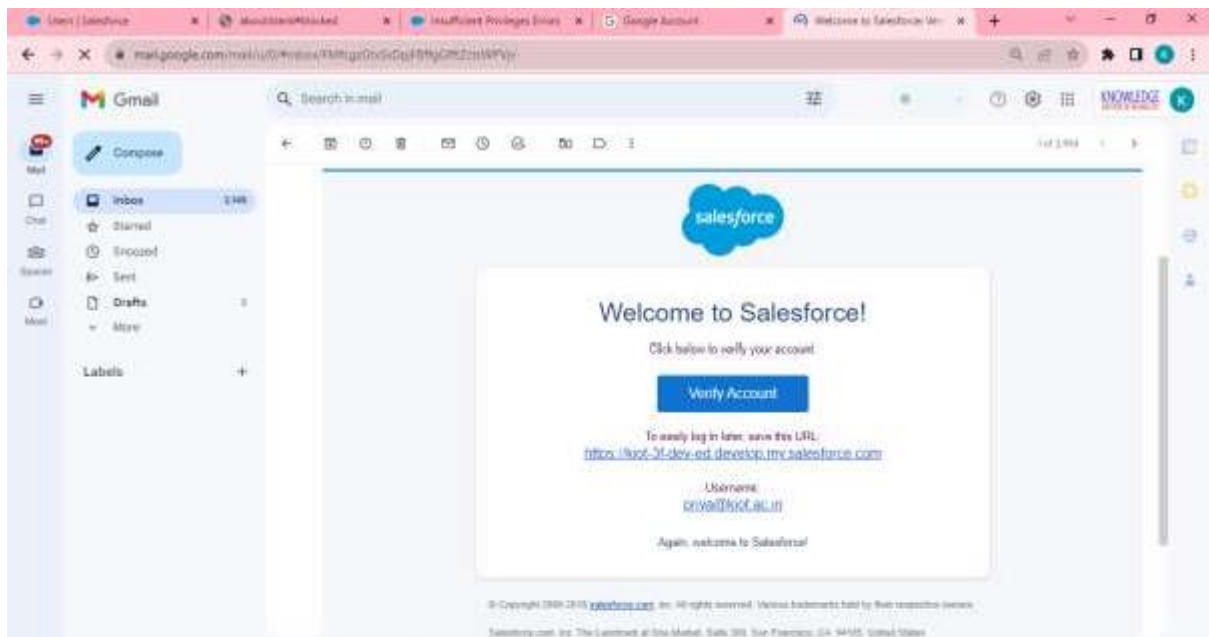
#### Session Settings

Session Times Out After 2 hours of inactivity

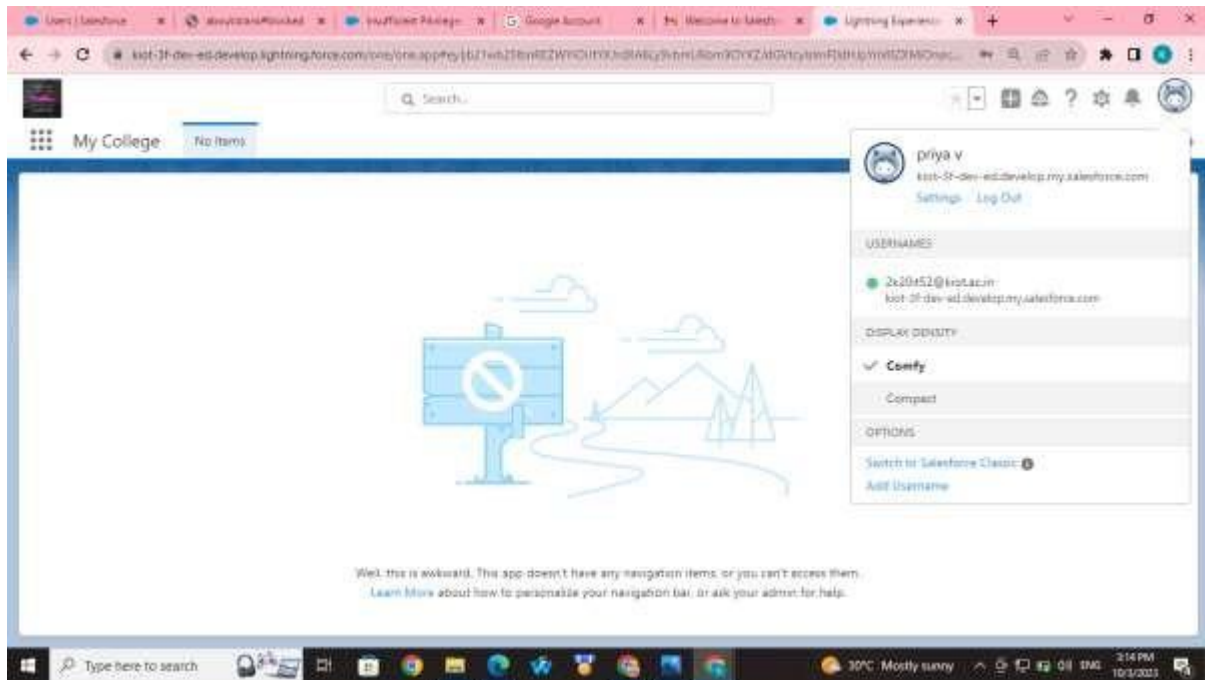
Require Security Level Required at Login --None--

#### Password Policies









## Step 2:

### Permission Sets:

- Create two permission sets, one for manager and one for sales manager.

### Object-Level Security:

- In each profile and permission set, set the object-level security for the Account object to

"Read" to ensure that both I-manager and I- sales manager can view Account records.

### Record-Level Security:

- Implement record-level security using Criteria-Based Sharing Rules.

- Create a sharing rule that shares Account records owned by manager with manager and records owned by I sales manager with sales manager.

- For the sharing rule criteria, specify that records owned by manager are shared with user A, and records owned by sales manager are shared with sales manager.

Ownership:

- Ensure that the Account records are owned by the respective users, with manager owning their records and sales manager owning their records.

Organization-Wide Defaults:

- Set the organization-wide defaults for the Account object to "Private" to ensure that records are private by default.

Testing:

- Test the setup by logging in as manager and sales manager separately to verify that they cannot access each other's records.

Setup Home Object Manager

per

Hyperforce Assistant

Lightning Experience Transition Assistant

Users

Permission Set Groups

Permission Sets

Feature Settings

Digital Experiences

Settings

Functions

Sales

Accounts

Person Accounts

Salesforce Scheduler

## Permission Sets

On this page you can create, view, and manage permission sets.

In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play. iOS | Android

All Permission Sets | Edit | Delete | Create New View

Action	Permissions Set Label	Description	License
<input type="checkbox"/>	Basic	Allows access to the store. Lets users see product...	B2B Buyer Permission Set One Seal
<input type="checkbox"/>	Buyer Manager	Includes all Buyer capabilities, and allows access t...	B2B Buyer Manager Permission Set One Seal
<input type="checkbox"/>	CRM User	Denotes that the user is a Sales Cloud to Service...	CRM User
<input type="checkbox"/>	Commerce Admin	Allow access to commerce admin features	Commerce Admin Permission Set License Seal
<input type="checkbox"/>	Contact Center Admin	Manage Service Cloud Voice contact centers that...	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Agent	Access agent features in Service Cloud Voice call...	Service Cloud Voice User

1-25 of 25 | 0 Selected | 4 Permission Sets

Page 1 of 2

Setup Home Object Manager

per

Hyperforce Assistant

Lightning Experience Transition Assistant

Users

Permission Set Groups

Permission Sets

Feature Settings

Digital Experiences

Settings

Functions

Sales

Accounts

Person Accounts

Salesforce Scheduler

## Permission Sets

### Create

Save Cancel

Enter permission set information

Label

API Name

Description

Session Activation Required ☐

Select the type of users who will use this permission set

Who will use the permission set?

Choose --None-- if you plan to assign this permission set to multiple users with different user and permission set licenses.

Permission Sets | Salesforce | Lightning Experience | Salesforce | Login | Salesforce

Search Setup

Setup Home Object Manager

per

Hyperforce Assistant

Lightning Experience Transition Assistant

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Permission Set Groups

Permission Sets

Feature Settings

Digital Experiences

Settings

Functions

Sales

Accounts

Person Accounts

Salesforce Scheduler

### SETUP Permission Sets

Permission Set: salesmanager1

Find Settings Close Delete Edit Properties Manage Assignments

#### Permission Set Overview

Description: License

API Name: salesmanager1

Session Activation Required: ☐

Name space Prefix: Created By: KEERTHIKA.G. 03/10/2023, 2:28 PM

Last Modified By: KEERTHIKA.G. 03/10/2023, 2:28 PM

#### Apps

**Assigned Apps**  
Settings that specify which apps are visible in the app menu.

**Assigned Connected Apps**  
Settings that specify which connected apps are visible in the app menu.

**Object Settings**  
Permissions to access objects and fields, and settings such as tab availability.

Type here to search

30°C Mostly sunny 10/3/2023

Permission Sets | Salesforce | Permission Sets | Salesforce | Lightning Experience | Salesforce | Login | Salesforce

Search Setup

Setup Home Object Manager

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Data

Email

PLATFORM TOOLS

Subscription Management

Apps

Feature Settings

Slack

MuleSoft

### SETUP Permission Sets

Permission Set: salesmanager1

Find Settings Close Delete Edit Properties Manage Assignments

Permission Set Overview Object Settings

#### Object Settings

Object Name	Object Permissions	Total Fields	Tab Settings
Accounts	No Access	43	—
AI Insights Reports	No Access	—	—
AI Recent Insights	No Access	—	—
Alternative Payment Methods	No Access	27	—
API Assembly Event Stores	No Access	14	—
App Analytics Query Requests	No Access	—	—
Developer License Assignments	No Access	—	—
Assignment Categories	No Access	3	—
Assignment Relations	No Access	17	—

Permission Sets | Salesforce | Lightning Experience | Salesforce | Login | Salesforce

Search Setup

Setup Home Object Manager

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Data

Email

PLATFORM TOOLS

Subscription Management

Apps

Feature Settings

Stack

MuleSoft

Enstrain

SETUP

### Permission Sets

Permission Set: salesmanager1

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

Permission Set Overview | Object Settings | books

books

Tab Settings

Available	Visible
<input type="checkbox"/>	<input type="checkbox"/> (1)

Object Permissions

Permission Name	Enabled
Read	<input type="checkbox"/>
Create	<input type="checkbox"/>
Edit	<input type="checkbox"/>
Delete	<input type="checkbox"/>

Permission Sets | Salesforce | Lightning Experience | Salesforce | Login | Salesforce

Search Setup

Setup Home Object Manager

Permission Sets

Profiles

Public Groups

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User Management Settings

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PLATFORM TOOLS

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MuleSoft

Enstrain

SETUP

### Permission Sets

Available Visible

Available	Visible
<input type="checkbox"/>	<input type="checkbox"/> (1)

Object Permissions

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

Field Permissions

Field Name	Read Access	Edit Access
Account Name	<input type="checkbox"/>	<input type="checkbox"/>
Created By	<input type="checkbox"/>	<input type="checkbox"/>
Created By (Name)	<input type="checkbox"/>	<input type="checkbox"/>

Permission Sets | Salesforce | Permission Sets | Salesforce | Lightning Experience | Salesforce | Login | Salesforce

Search Setup

Setup Home Object Manager

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Tools

Platform Tools

Subscription Management

Apps

Feature Settings

Stack

AppExchange

Knowledge

Objects and Fields

Events

Process Automation

User Interface

salesmanager1

Current Assignments

Add Assignment

No assignments defined.

Type here to search

30°C Mostly sunny

3:47 PM 10/3/2023

Permission Sets | Salesforce | Permission Sets | Salesforce | Lightning Experience | Salesforce | Login | Salesforce

Search Setup

Setup Home Object Manager

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Tools

Platform Tools

Subscription Management

Apps

Feature Settings

Stack

AppExchange

Knowledge

Objects and Fields

Events

Process Automation

User Interface

Custom Code

Development

Performance

salesmanager1

Select Users to Assign

All Users

4 users • Sorted by Full Name • Filtered by 40 users • Updated 2 hrs 26 mins ago

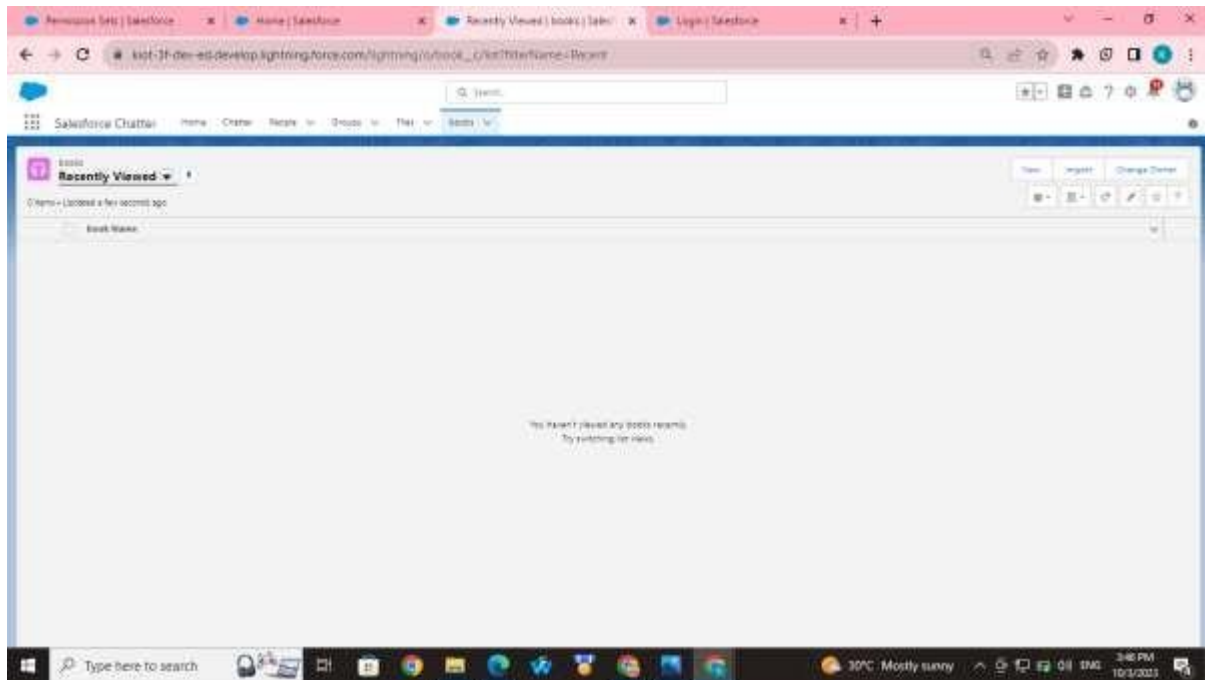
Search for user...

	Full Name 1	Alias	Username	Role	Action	Profile
<input type="checkbox"/>	Chaitan Bhandari	Chaitan	chaitan_bhandari@lightning.force.com			Chaitan Bhandari
<input type="checkbox"/>	Integration User	Integration	integration@lightning.force.com			Integration User
<input type="checkbox"/>	John F.	John	johnf@lightning.force.com			John F. Bhandari
<input type="checkbox"/>	System Administrator	System Administrator	systemadmin@lightning.force.com			System Administrator
<input type="checkbox"/>	System User	System User	systemuser@lightning.force.com			System User

Cancel Assign







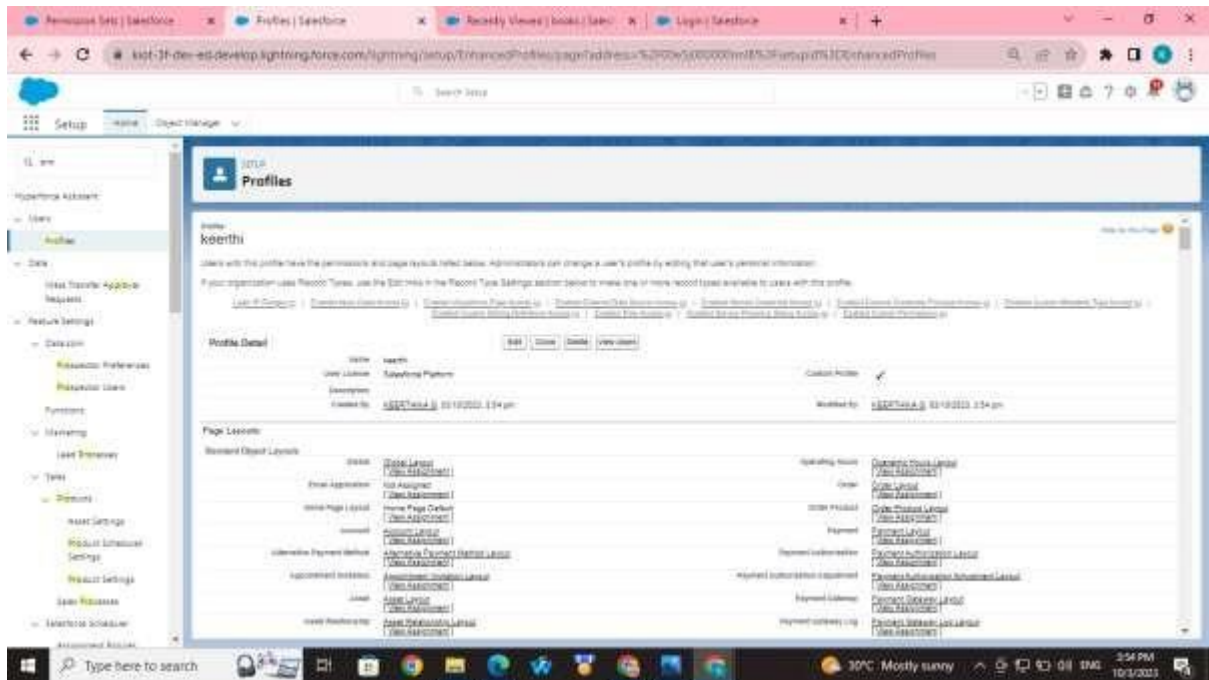
3. Suppose there are 2 Users and they are having Create, Read, Edit access on Account Object with the same profile but we want to open up the access for one user to delete how will you implement the Security setting.

Solution:

Step 1: we need create a profile for the two user which has the access to Create, Read, Edit for follow as per.

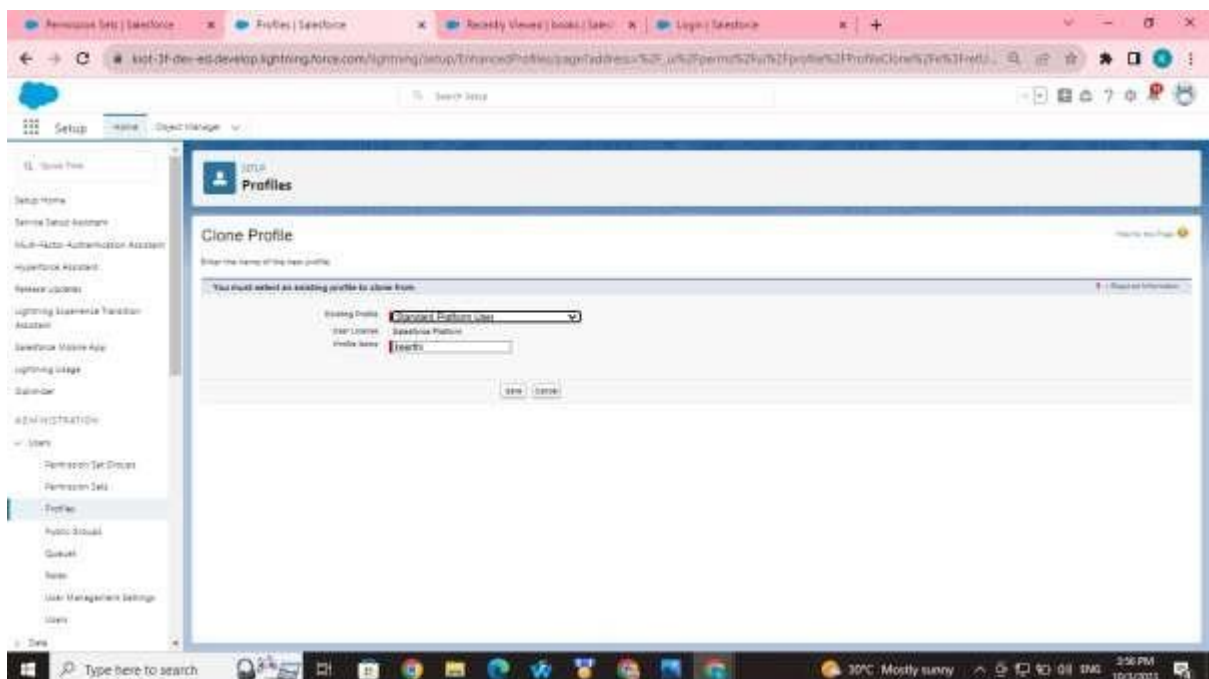
Setup-quick search[profile]



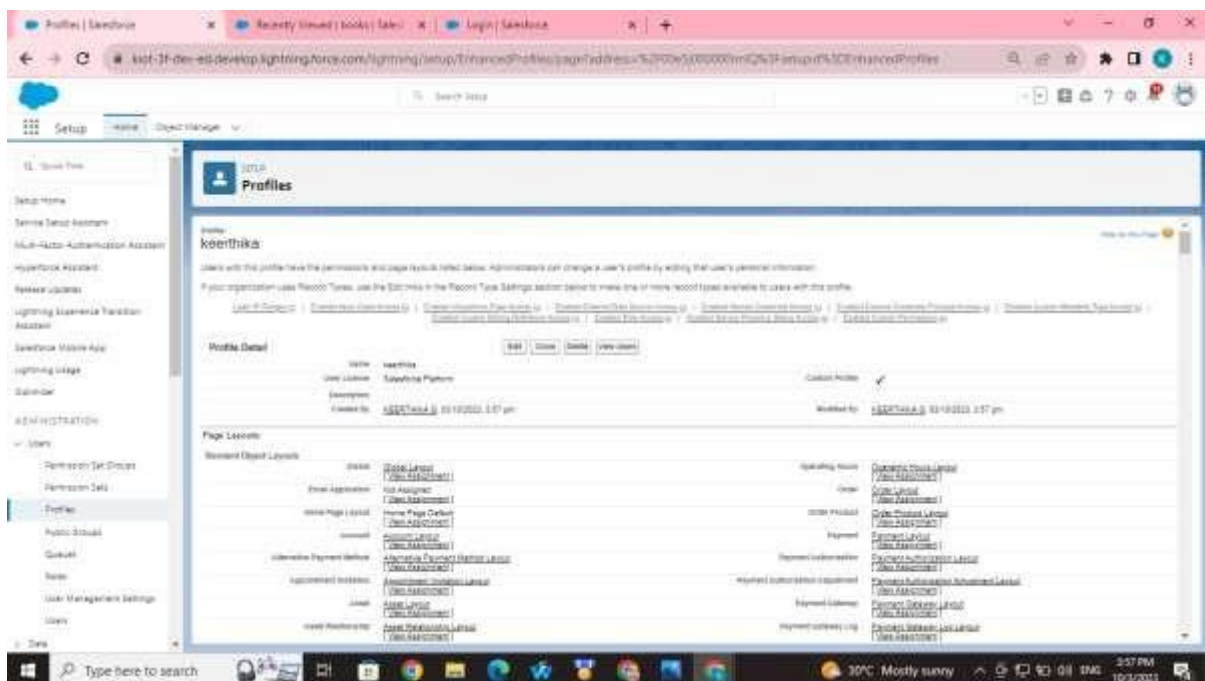


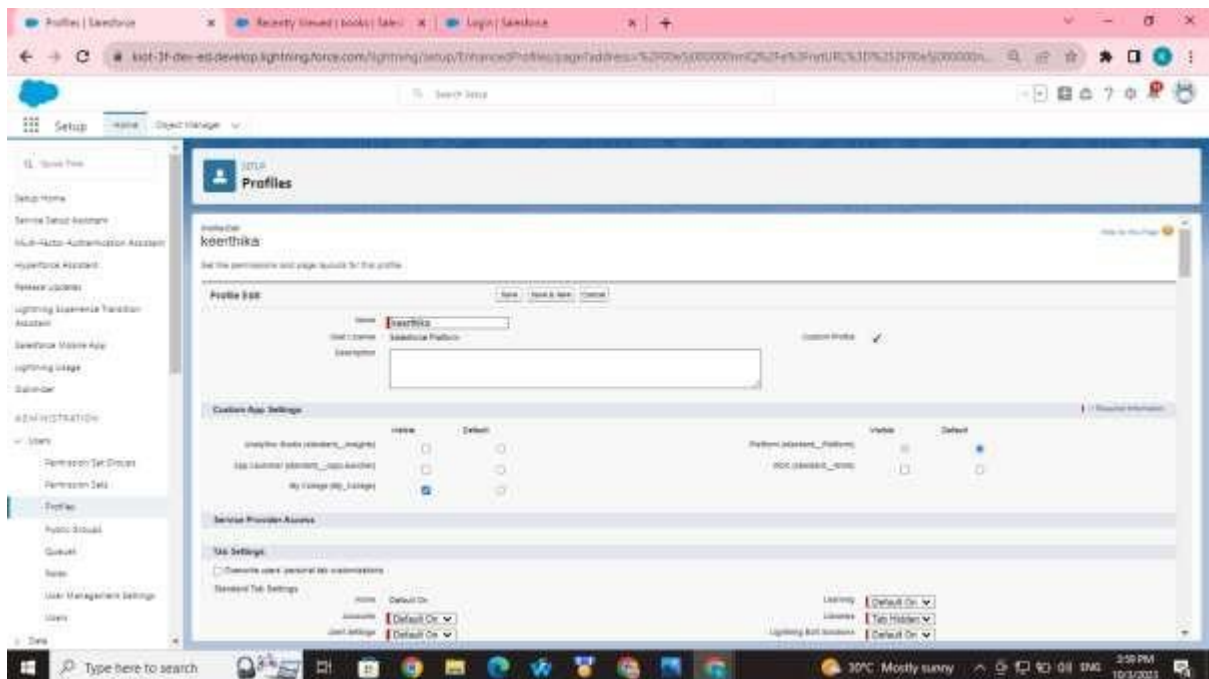
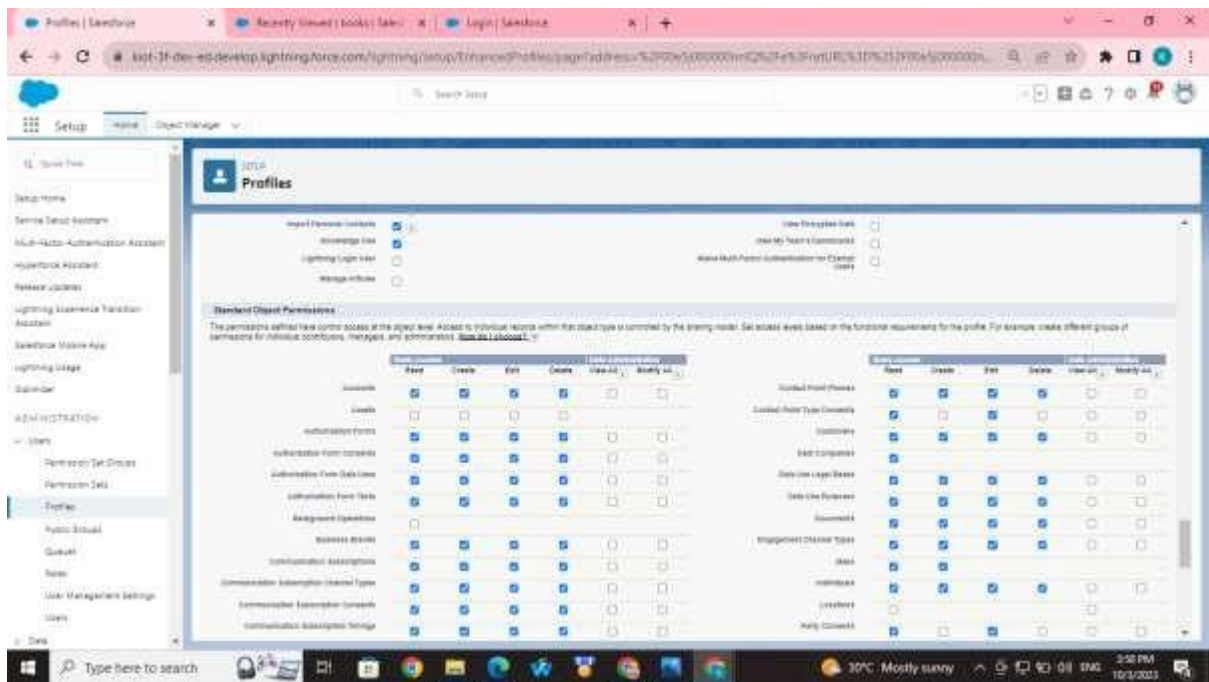
### Step 2:

Click on the new to create a new profile along with the label and Api



Now click on the edit and scroll down to custom object settings and enable the read,create,edit and view options. After that click on save.

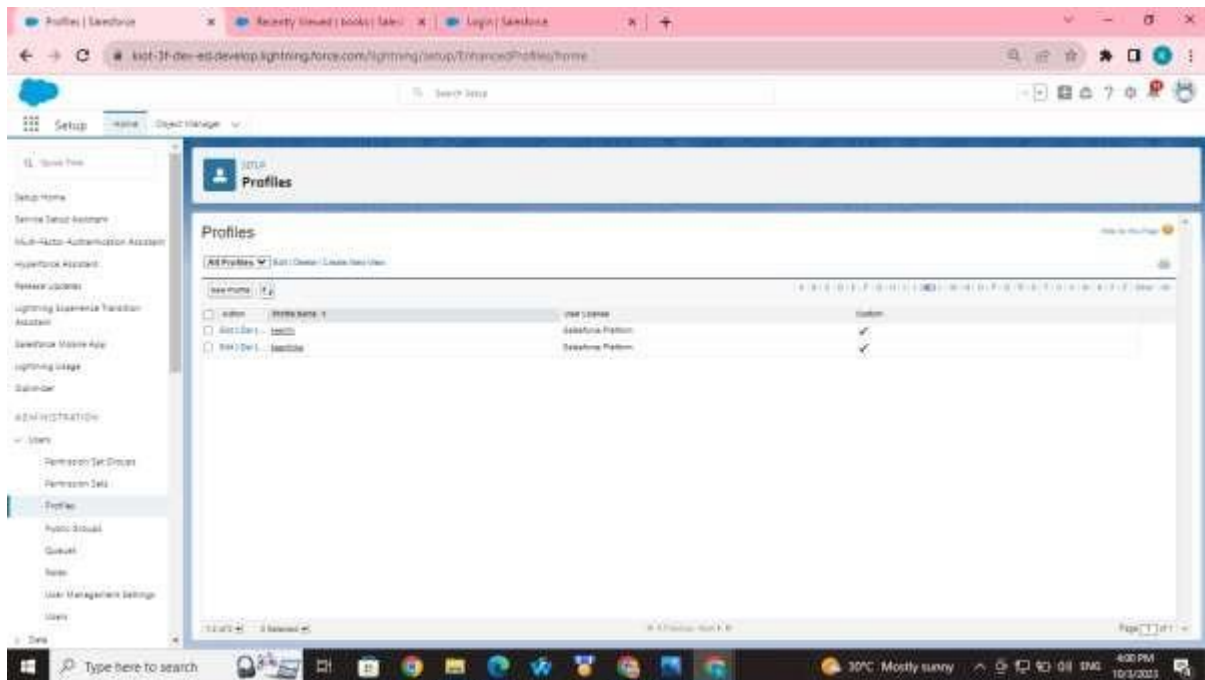




## Step 4

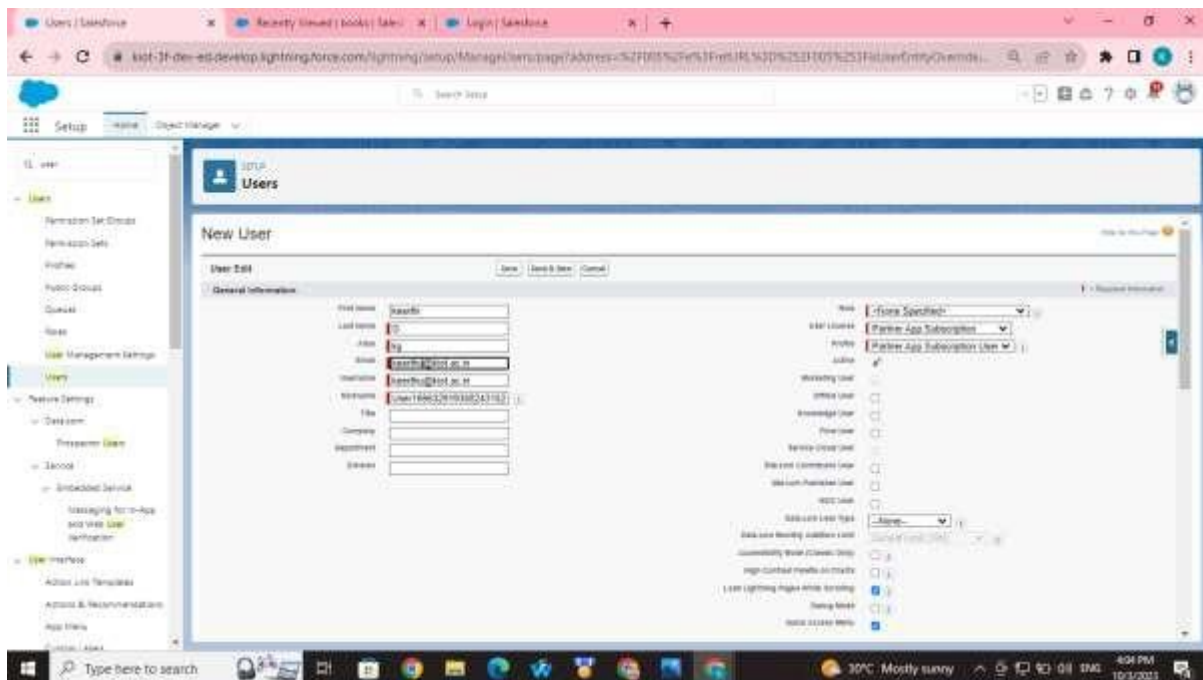
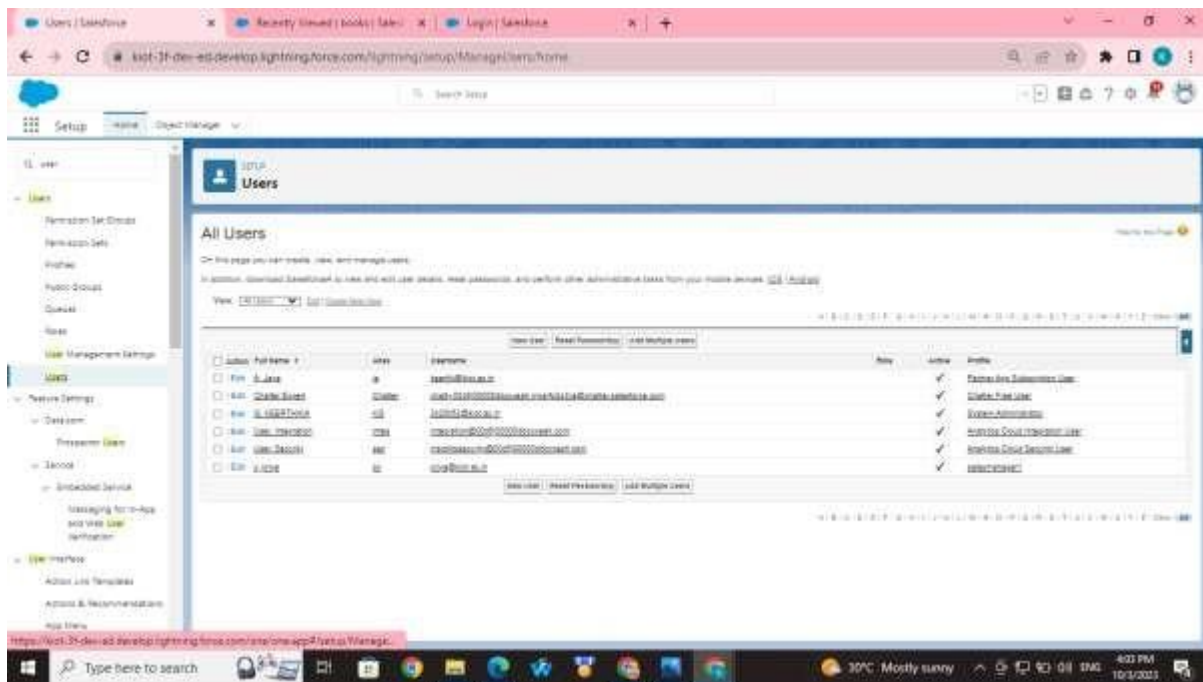
Now you can preview your created profile on the profile option here my profile name jaga has been

created with the access of read,create,edit along with view on it



## Step 5:

Now create two users by enter into the Setup-quick search[user] and then click on new user after clicking that you need to create two user along with the profile as Jaga which we have created on the step 2.once the one user has been created click on the save&new so that you can create the second user and there the user name can be created with alternate name but with the same user profile and once the two user are create click on save.



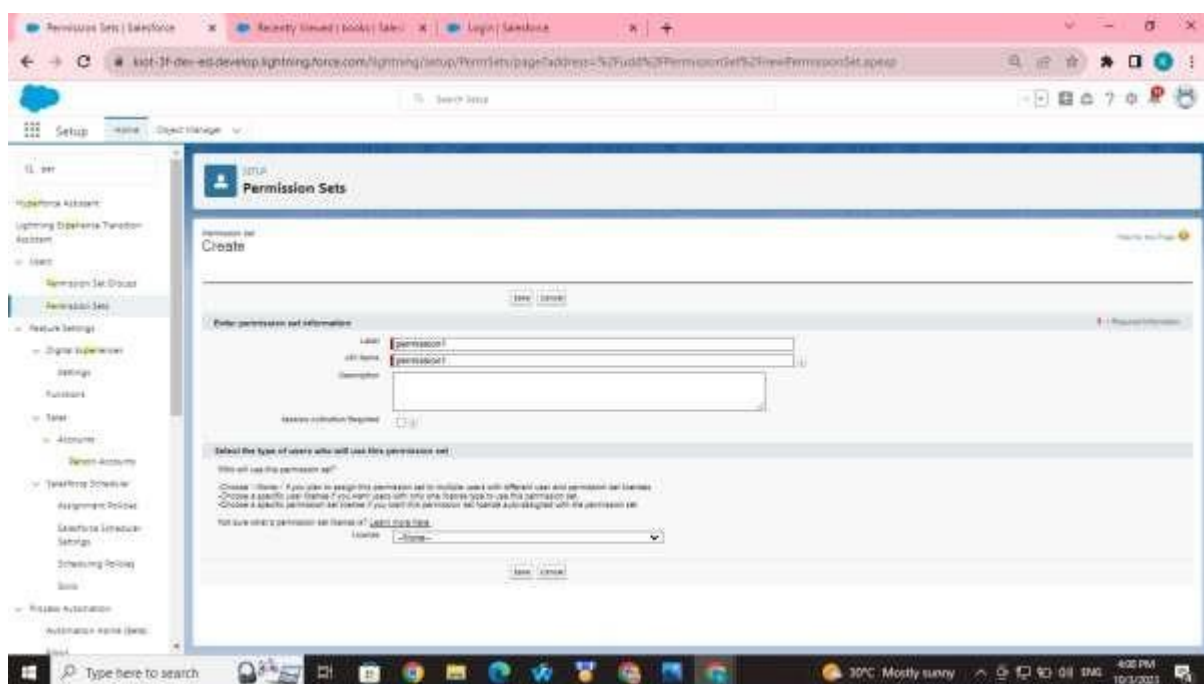
Now you can preview your two user that you have created in my side I had create the two users a Jagadesh11 and Jagadesh22 as a director channel sales with the marketing team.

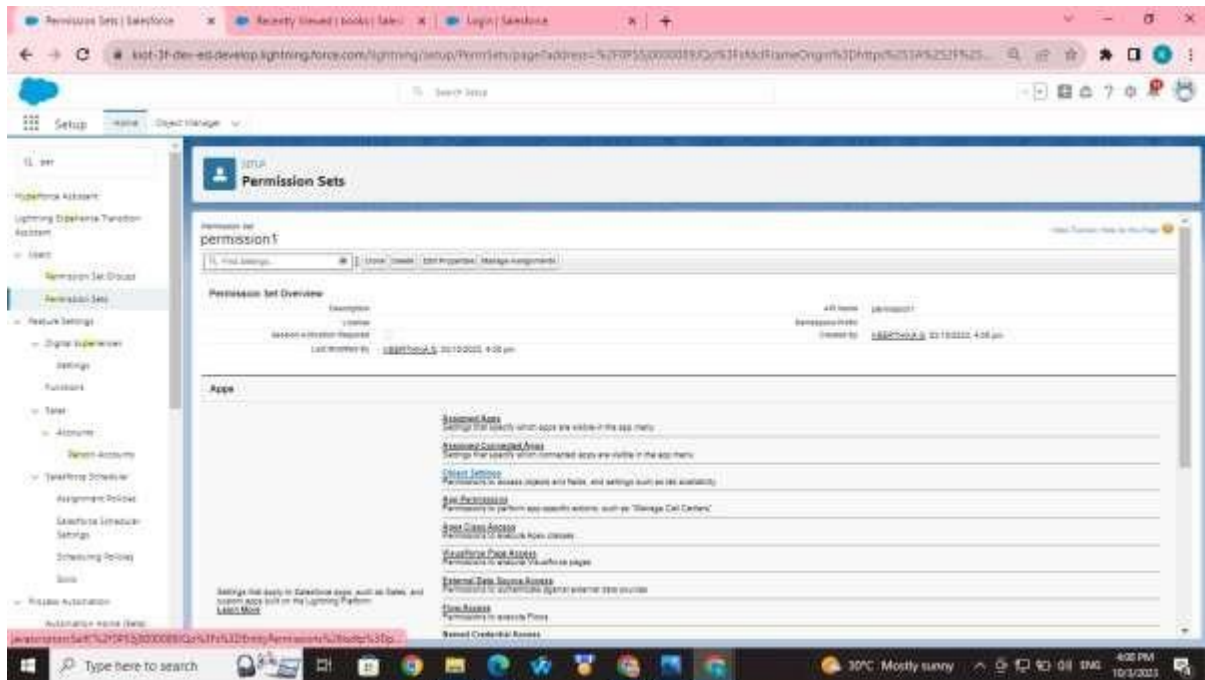


## Step 6:

Now the two user as been created with the profile so that two user can perform the Create, Read, Edit and view on both the user. So as per the given task we need to allocate a specific access as delete on one user for that we need create a permission set for one user so it can created as

setup-quick search[permission set]-new-fill label name [auto select the API name]-click on save-object settings-accounts.





## Step 7:

Now to give the specific delete access to the user click on edit on the Account and then enable the read,create,edit and the delete on it so that the permission set will have a specific special access on it. once it has been done click on save and then click on manage assignment.

Permission Sets | Salesforce x Recently Viewed | Books | Sales x Login | Salesforce

kit-3f-dev-ed-develop.lightning.force.com/lightning/setup/PermissionSet/page/address=5270P550000018Q2n3F63D0mtyPermissionSetMe53DAccount

Setup Home Object Manager

My Home

My Home Account

Lightning Experience Transition Assistant

Users

Permission Set Groups

Permission Set

Feature Settings

Single Sign-On

Settings

Functions

Tools

Accounts

Report Accounts

Transfer/Pop Scheduler

Assignment Policies

Caseforce Scheduler Settings

Scheduling Policies

Tools

Workflow Automation

Automation Home (Beta)

Permission Set

permission1

11 Find Settings

11 Users | Groups | Edit Properties | Manage Assignments

Permission Set Overview | Object Settings | Accounts

Accounts

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"/>
Name	<input type="checkbox"/>	<input type="checkbox"/>
Annual Revenue	<input type="checkbox"/>	<input type="checkbox"/>
Billing Address	<input type="checkbox"/>	<input type="checkbox"/>

https://kit-3f-dev-ed-develop.salesforce.com/lightning/setup/PermissionSet/page/address=5270P550000018Q2n3F63D0mtyPermissionSetMe53DAccount

Type here to search

30°C Mostly sunny

4:00 PM 10/13/2023

Permission Sets | Salesforce x Recently Viewed | Books | Sales x Login | Salesforce

kit-3f-dev-ed-develop.lightning.force.com/lightning/setup/PermissionSet/page/address=5270P550000018Q2n3F63D0mtyPermissionSetMe53DAccount

Setup Home Object Manager

My Home

My Home Account

Lightning Experience Transition Assistant

Users

Permission Set Groups

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Settings

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Tools

Accounts

Report Accounts

Transfer/Pop Scheduler

Assignment Policies

Caseforce Scheduler Settings

Scheduling Policies

Tools

Workflow Automation

Automation Home (Beta)

Permission Set

permission1

11 Find Settings

11 Users | Groups | Edit Properties | Manage Assignments

Permission Set Overview | Object Settings | Accounts

Accounts

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"/>

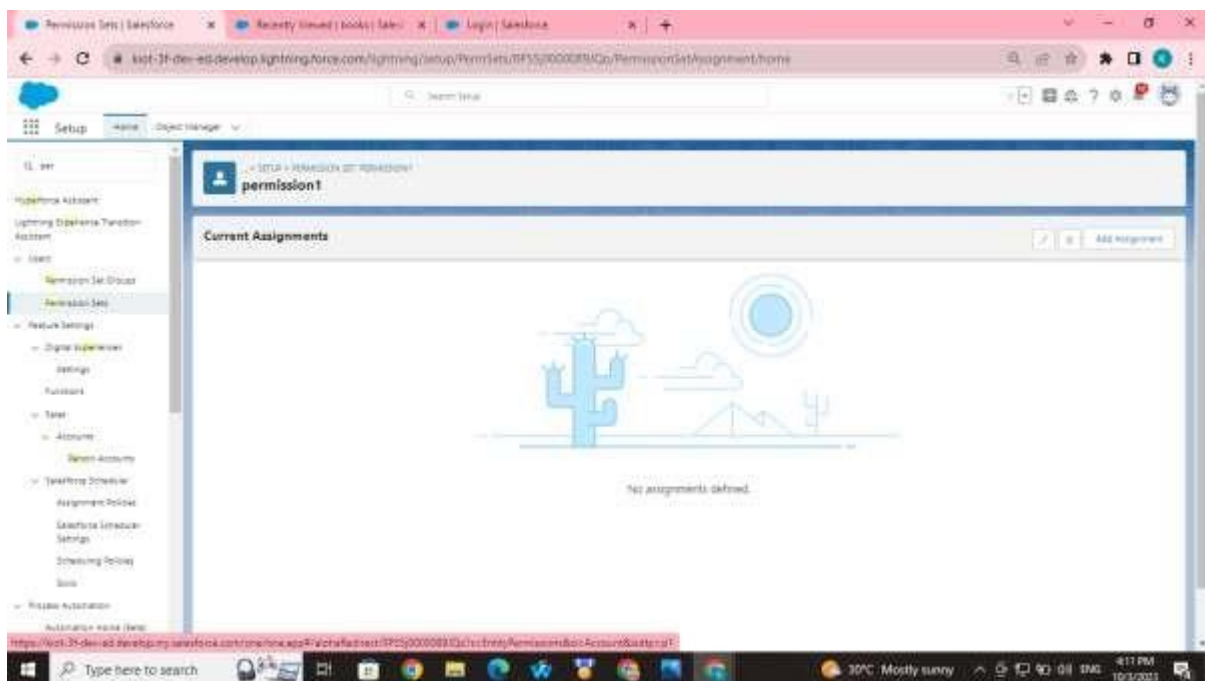
Field Permissions

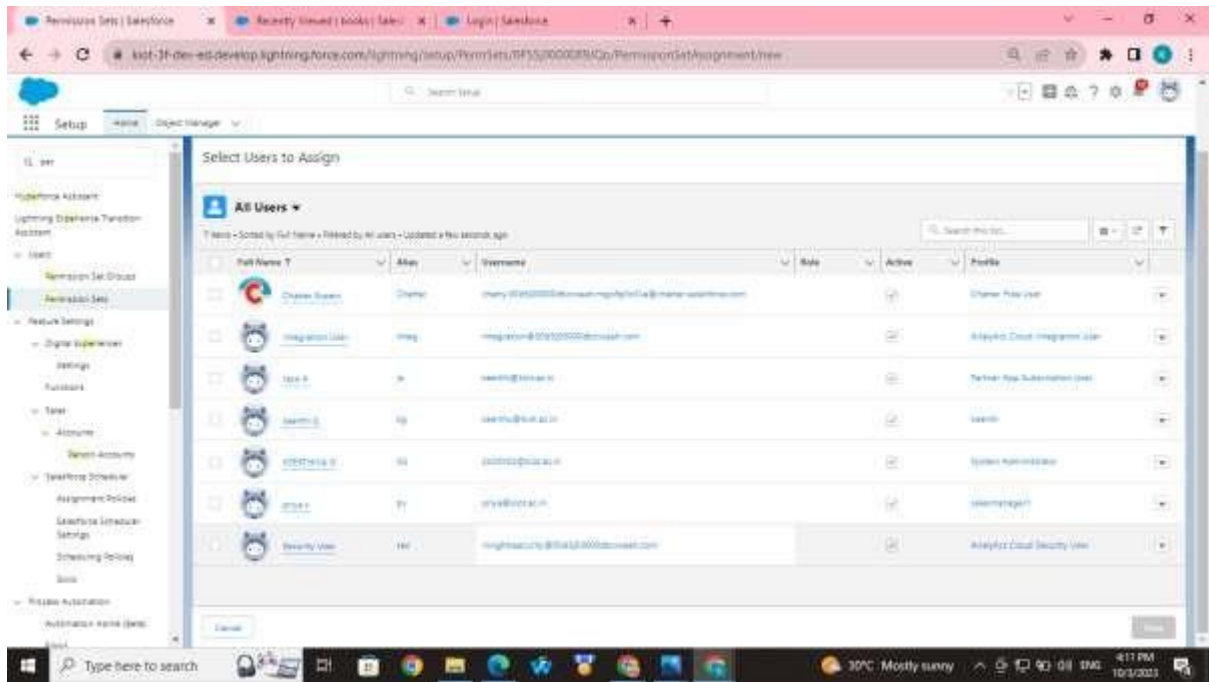
Field Name	Read Access	Edit Access
Account Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Account Number	<input type="checkbox"/>	<input type="checkbox"/>
Account Owner	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Account Site	<input type="checkbox"/>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



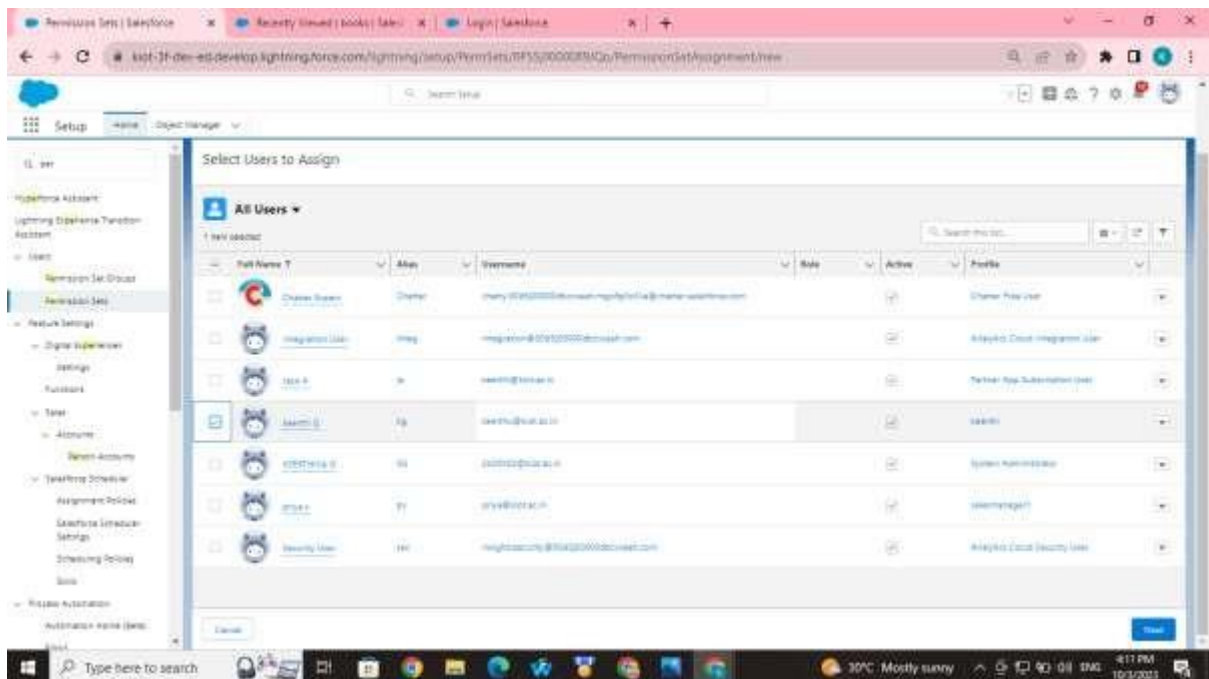
## Step 8

Now click on add assignment there you will find your two created users click on any one user to give a special access as delete on it and then click on assign so that the specific selected user can have a special access as delete on it.

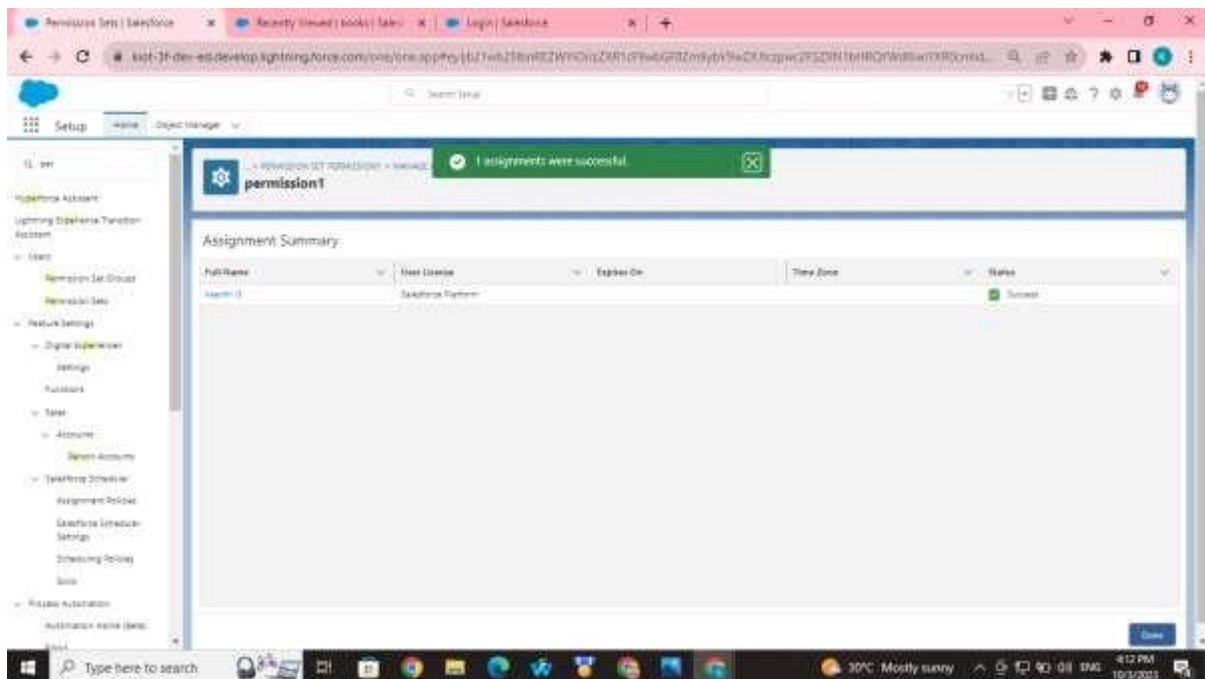
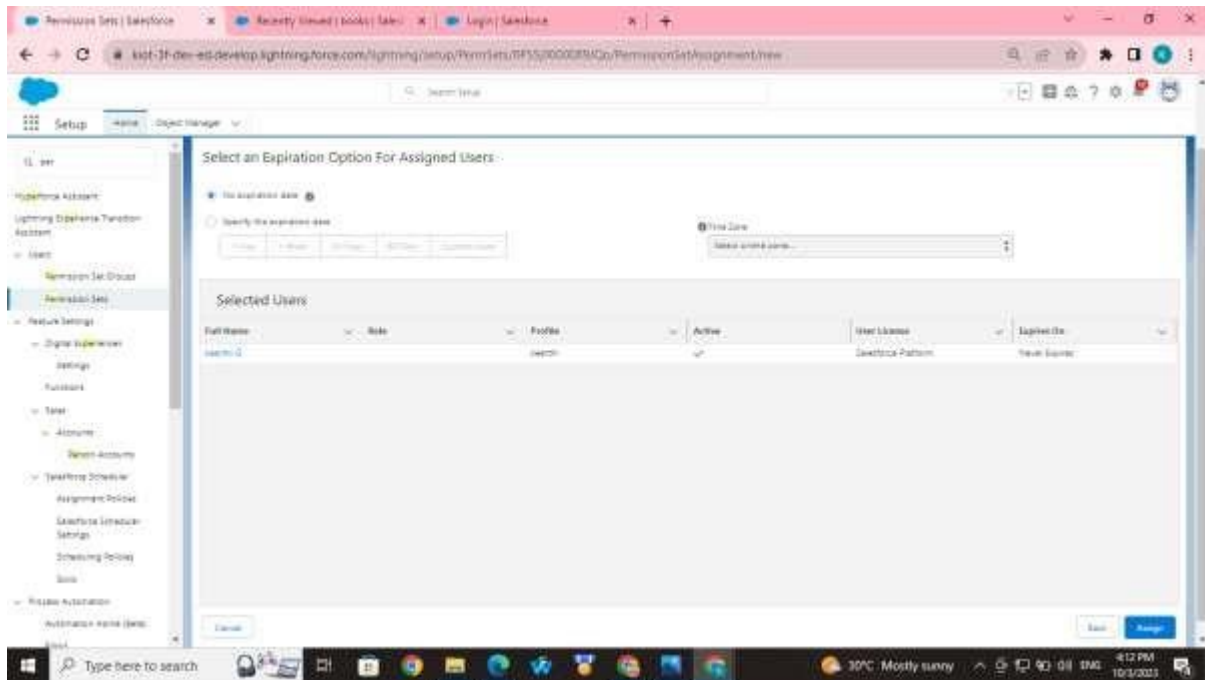




Click on next



Now click on Assign.



Now the specific access for the Jagadeesh11 user has been assigned successfully.

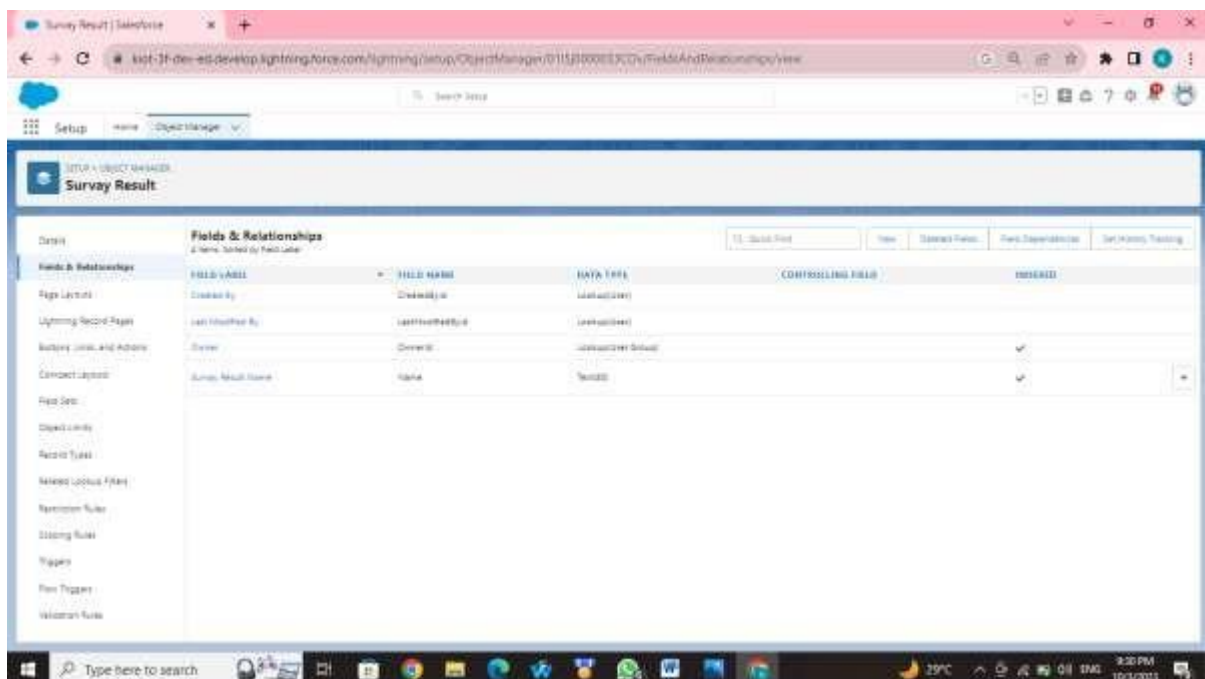
4. Create a screen flow for a basic survey to fill in the details for any form.

Solution:

### Step 1: Create a Custom Object

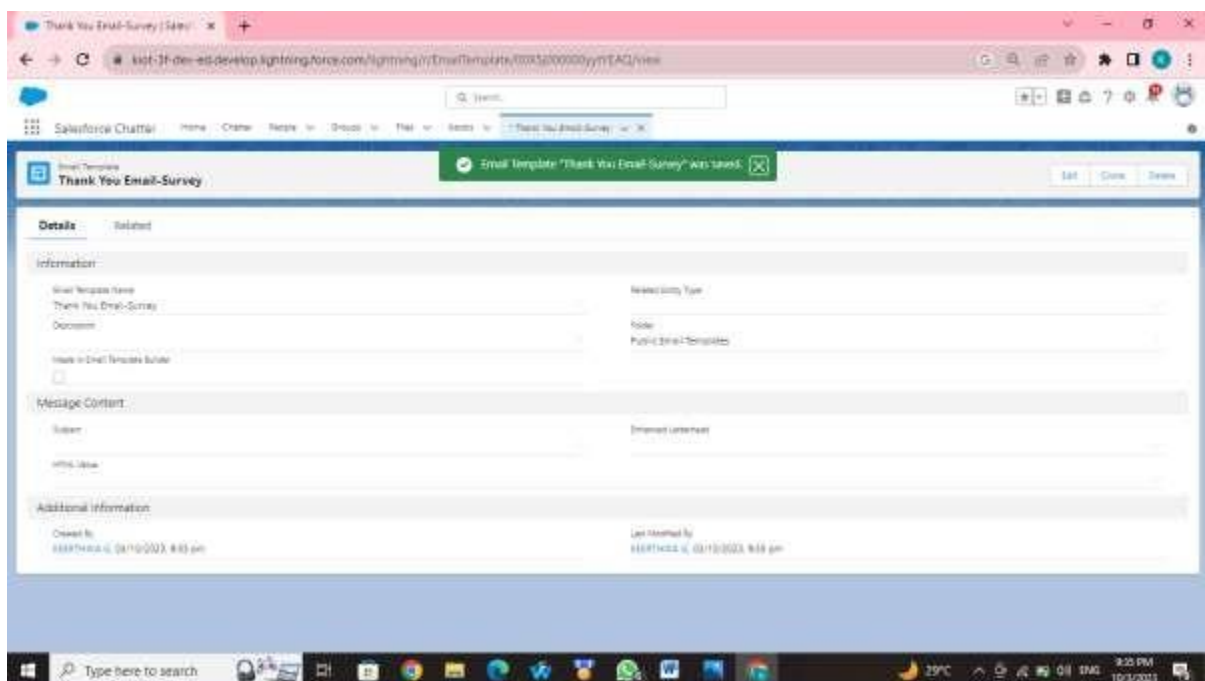
The next step is to create a custom object **Survey Result** and a few custom fields to store survey responses.

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**.



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

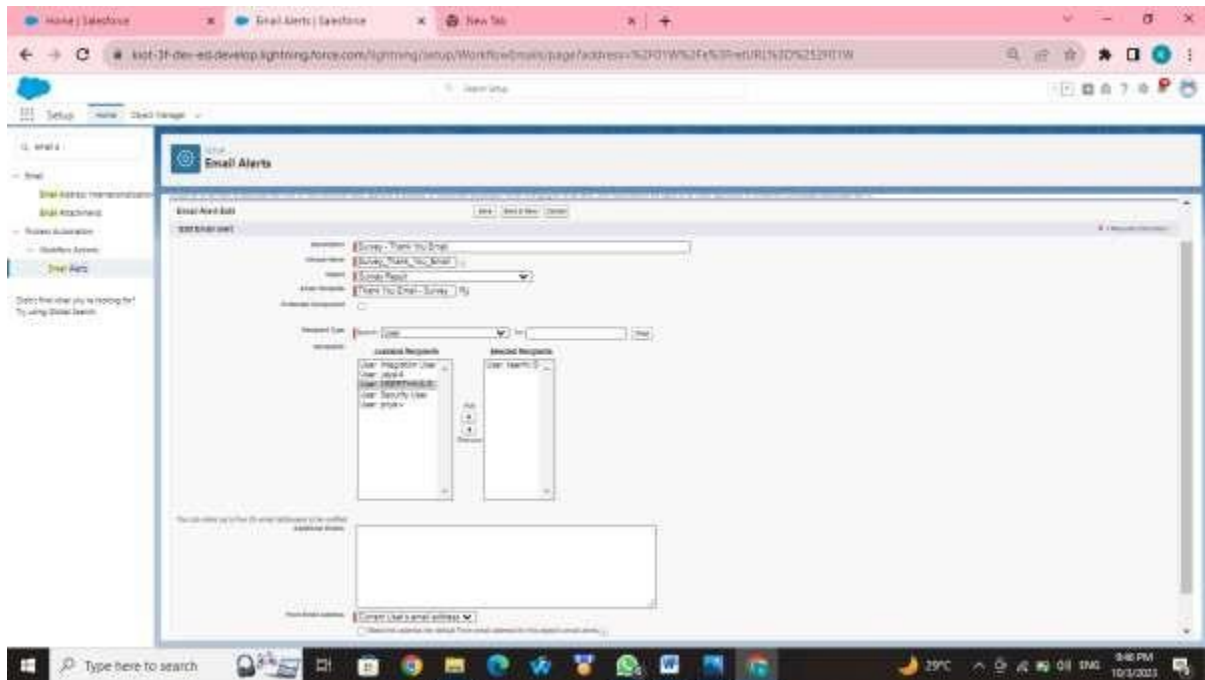
1. Click **App Launcher**.
2. In the Quick Find box, type **Email Templates**.
3. Clicks on the **New Email template** button.
4. Name the **Lightning Email Template** and make sure to store it in the **Public Email Templates** folder.
5. Create a template like the following screenshot.



### 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**.





## 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:
  1. **How do you want to start building: Freeform**
5. 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** object from the dropdown list.
6. **Set Field Values for the Survey Result**
  1. Row 1:
    1. **Field:** **Comment\_\_c**
    2. **Value:** **{!Comment}**
  2. Click **Add Row**
  3. Row 2:
    1. **Field:** **Email\_\_c**
    2. **Value:** **{!Email.value}**
  4. Click **Add Row**
  5. Row 3:
    1. **Field:** **Name\_\_c**
    2. **Value:** **{!Name.firstName}**  
**{!Name.lastName}**
  6. Click **Add Row**
  7. Row 3:

1. **Field: Rating\_\_c**
  2. **Value: {!Rating}**
7. Click **Done**.

The screenshot shows the 'Edit Create Records' configuration screen in Salesforce Flow. The interface is divided into several sections:

- Create Salesforce records using values from the flow:**
  - \* Label:** Save Response
  - \* API Name:** Save\_Response
  - Description:** (Empty text area)
- How Many Records to Create:**
  - ☒ One
  - ☐ Multiple
- How to Set the Record Fields:**
  - ☐ Use all values from a record
  - ☒ Use separate resources, and literal values
- Create a Record of This Object:**
  - \* Object:** Survey Result
- Set Field Values for the Survey Result:**

Field	Value
Comment__c	← A <sub>3</sub> Comment X
Email__c	← A <sub>3</sub> Email > Value X
Name__c	← {!Name.firstName} {!Name.lastName}
Rating__c	← A <sub>3</sub> Rating X

+ Add Field

☐ Manually assign variables

At the bottom right, there are 'Cancel' and 'Done' buttons.

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

The next step is to call the **Survey – Thank You Email** email alert from flow so that when flow fires it triggers the thank you email to survey participants.

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	* API Name
<input type="text" value="Send Thank You Email"/>	<input type="text" value="Send_Thank_You_Email"/>

Description

---

#### Set Input Values

A <sub>3</sub>	* Record ID
	<input type="text" value="{!Save_Response}"/>

Cancel
Done

In the end, Sergio's **Flow** will look like the following screenshot:



- 1. Click Save.**

2. Enter **Flow Label** the **API Name** will auto-populate.
3. Click **Show Advanced**.
4. **How to Run the Flow: User or System Context—Depends on How Flow is Launched**
5. **Type: Screen Flow**
6. **API Version for Running the Flow: 51**
7. **Interview Label: Survey  
{!\$Flow.CurrentDateTime}**
8. Click **Save**.

Save as

A New Version

A New Flow

\* Flow Label

Survey

\* Flow API Name

Survey

Description

Hide Advanced

How to Run the Flow ⓘ

User or System Context–Depends on How Flow is Launched

\* Type

Screen Flow

\* API Version for Running the Flow

51

Interview Label ⓘ

Insert a resource...

Survey (!\$Flow.CurrentDateTime)

Last Modified

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

Status:

Active

Type:

Screen Flow

Version Number:

2

Cancel

Save

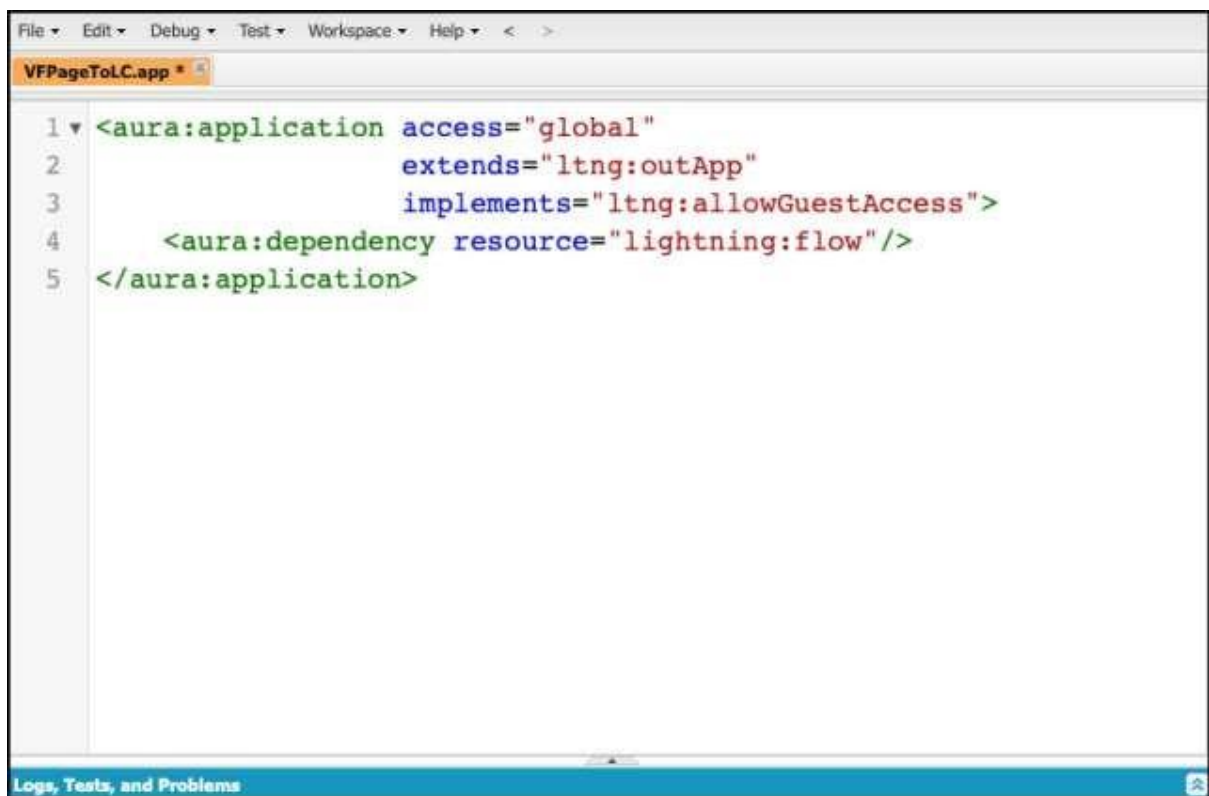
Step 5: Create a Lightning Application to Render Lightning Runtime for Flow in a Visualforce Page

Now we will create a Lightning Application that declares a dependency on the **lightning:flow** component.

## 1.Click Setup | Developer Console



2. Navigate to **File | New | Lightning Application**
3. Enter a **Name (VFPageToLC)** field, make sure to select the **Lightning Out Dependency App** checkbox.
4. Click **Submit**.
5. Copy code from **GitHub** and paste it into your Lightning Application.
6. **Save** your code.



The screenshot shows an IDE window titled "VFPageToLC.app". The code editor contains the following XML code:

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

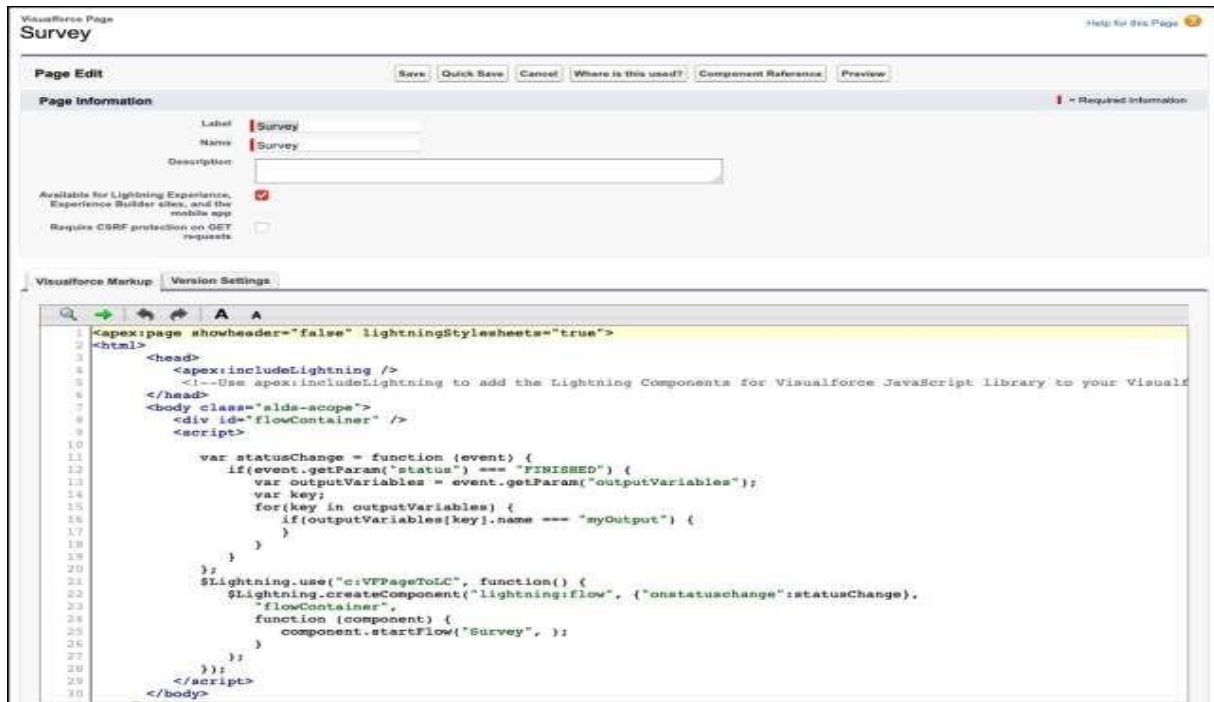
The bottom status bar indicates "Logs, Tests, and Problems".

Step 6: Create a Visualforce Page and Embed Your Flow Into It

Now we will create a Lightning Application that declares a dependency on the **lightning:flow** component.

Add the Lightning Components for Visualforce JavaScript library to your Visualforce page using the **<apex:includeLightning/>** component. In the Visualforce page, reference the dependency app. Then write a JavaScript function that creates the component on the page using **\$Lightning.createComponent()**

1. Click **Setup**.
2. In the Quick Find box, type **Visualforce Pages**.
3. Clicks on the **New** button.
4. Copy code from **GitHub** and paste it into your visualforce page
5. Click **Save**.



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

SaveCancel

Site Label

Survey

i

Site Name

Survey

i

Site Description

Site Contact

Rakesh Gupta

i

Default Record Owner

Rakesh Gupta

i

Default Web Address

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

i

Active

☒

i

Active Site Home Page

Survey

[Preview]

Inactive Site Home Page

InMaintenance

[Preview]

Site Template

SiteTemplate

i

Site Robots.txt

Site Favorite Icon

Analytics Tracking Code

i

URL Rewriter Class

i

Enable Feeds

☐

Clickjack Protection Level

Allow framing by the same origin only (Recommended)

i

Require Secure Connections (HTTPS)

☒

i

Lightning Features for Guest Users

☒

i

Upgrade all requests to HTTPS

☒

i

Enable Content Sniffing Protection

☒

i

Enable Browser Cross Site Scripting Protection

☒

i

Referrer URL Protection

☒

i

Guest Access to the Payments API

☐

i

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

\* Rating

5

\* Comment

Awesome Blog

Next

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

