

NAAN MUDHALVAN
Salesforce Developer (Course)
Assignment No - 1

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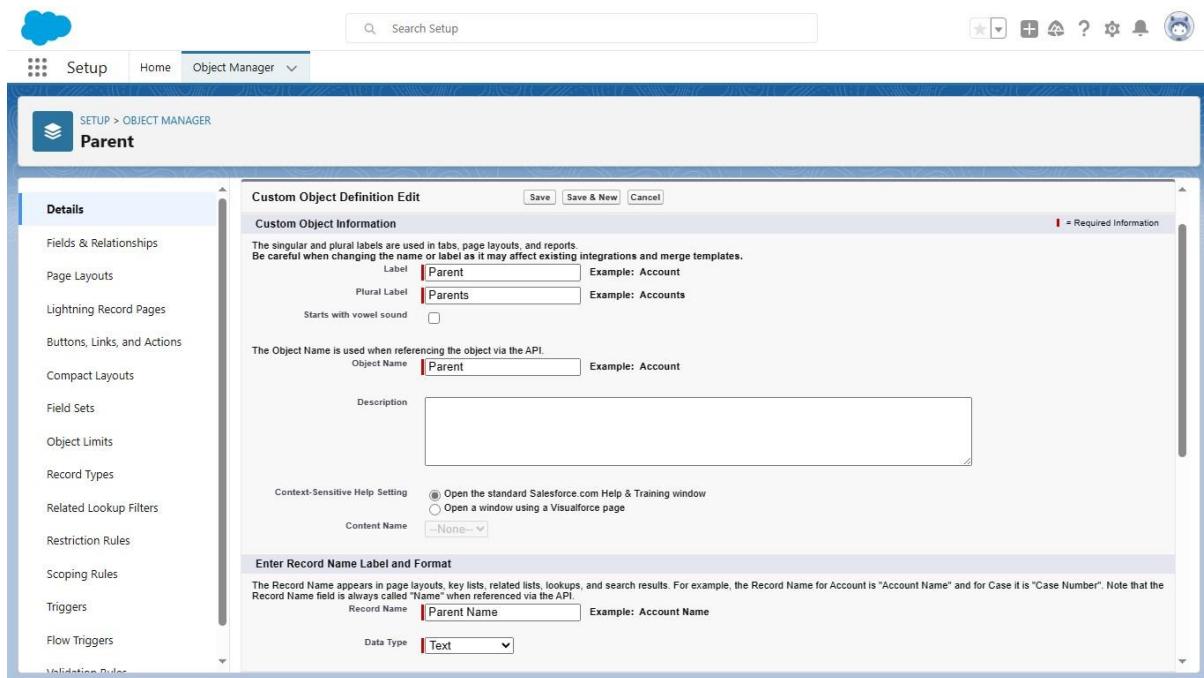
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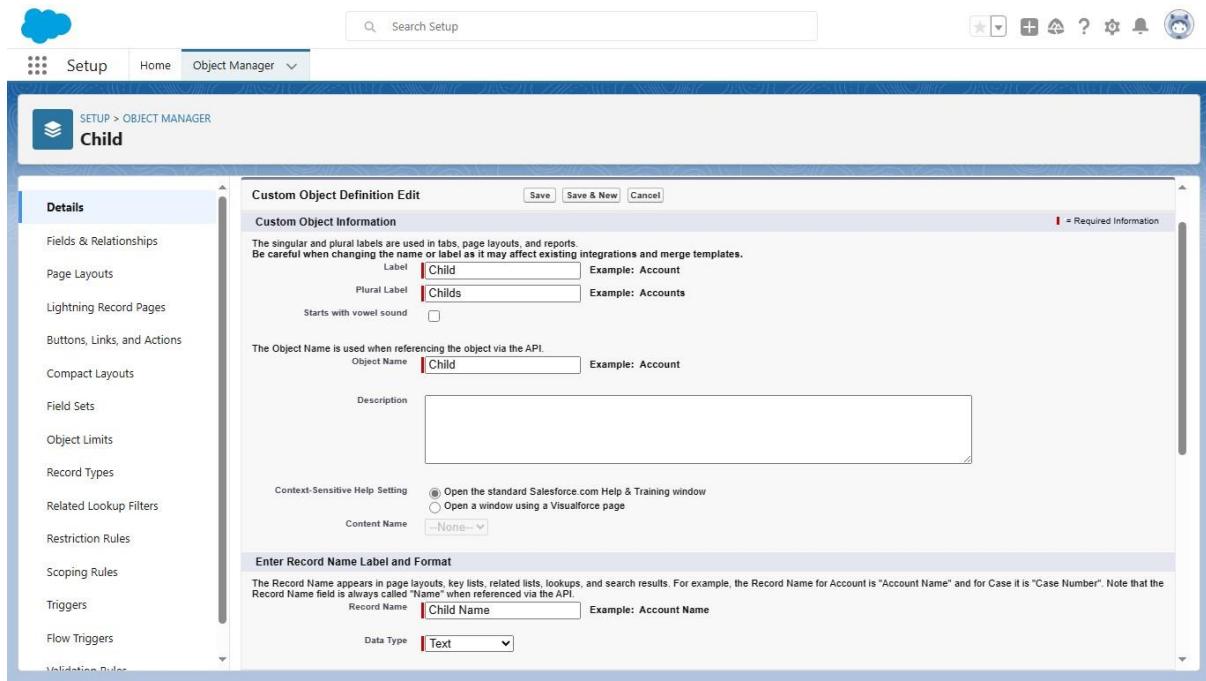
Batch : 2024

Zone no : Zone 8

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

Step 1: Create Custom Objects.





Step 2: Create a Master-Detail Relationship

1. Go to "Setup" in Salesforce.
2. In the Quick Find box, type "Objects" and select "Objects and Fields" > "Objects".
3. Click on "Parent" to edit it.
4. In the "Custom Fields & Relationships" section, click "New" under "Related To".
5. Choose "Master-Detail Relationship" as the data type.
6. In the "Related To" field, select "Child".
7. Configure other options as needed (e.g., setting the relationship name and whether it's required).
8. Save the changes.

The screenshot shows the Salesforce Object Manager interface for the 'Parent' object. The left sidebar has 'Fields & Relationships' selected. The main area displays a table titled 'Fields & Relationships' with 4 items, sorted by Field Label. The columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED.

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

The screenshot shows the process of creating a new custom field for the 'Parent' object. The left sidebar has 'Fields & Relationships' selected. The main area is titled 'New Custom Field' and is currently on 'Step 1. Choose the field type'. The step title is 'Step 1' and there are 'Next' and 'Cancel' buttons at the top right.

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.

Master-Detail 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.
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.

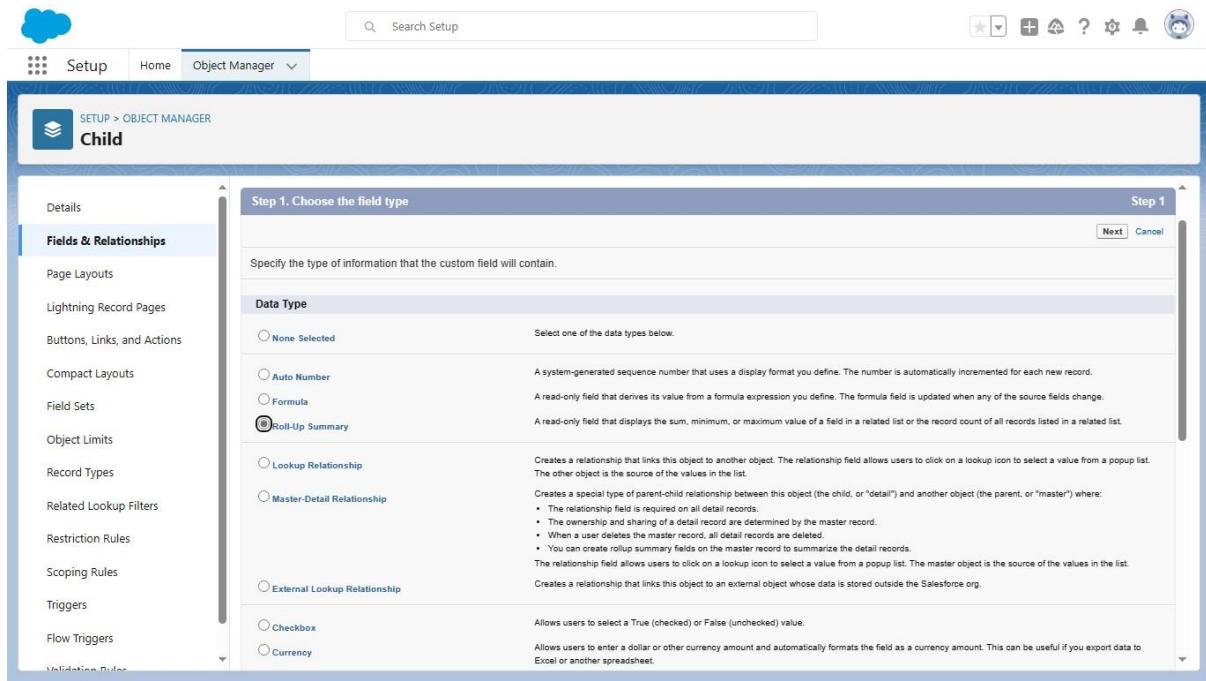
The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

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

The screenshot shows the Salesforce Setup interface for creating a new relationship between the Parent and Child objects. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'Parent' under 'SETUP > OBJECT MANAGER'. On the left, a sidebar lists various object configuration options like Page Layouts, Lightning Record Pages, and Fields & Relationships (which is currently selected). The main content area is titled 'New Relationship' and is on 'Step 2 of 6'. It asks 'Select the other object to which this object is related' and has a dropdown menu showing 'Child'.

The screenshot shows the Salesforce Setup interface for the Child object's Fields & Relationships. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'Child' under 'SETUP > OBJECT MANAGER'. The left sidebar lists various object configuration options, with 'Fields & Relationships' selected. The main content area displays a table of fields:

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



Step 3: Create a Roll-Up Summary Field

1. In the same "Parent" editing page, scroll down to the "Roll-Up Summary Fields" section.
2. Click "New Roll-Up Summary Field."
3. Choose the "Child" as the child object for which you want to calculate the total.
4. Give your Roll-Up Summary Field a name (e.g., "Total_Child_Records__c").
5. Choose the type of calculation you want (e.g., "COUNT").
6. Configure any additional filter criteria if needed.
7. Save the changes.

The screenshot shows the Salesforce Setup interface with the 'Tabs' page selected. The left sidebar has 'User Interface' expanded, with 'Tabs' selected. A message at the top says 'Didn't find what you're looking for? Try using Global Search.' The main content area displays four sections: 'Custom Object Tabs', 'Web Tabs', 'Visualforce Tabs', and 'Lightning Component Tabs'. Each section has a 'New' and 'What Is This?' link. The 'Custom Object Tabs' section contains the following data:

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

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

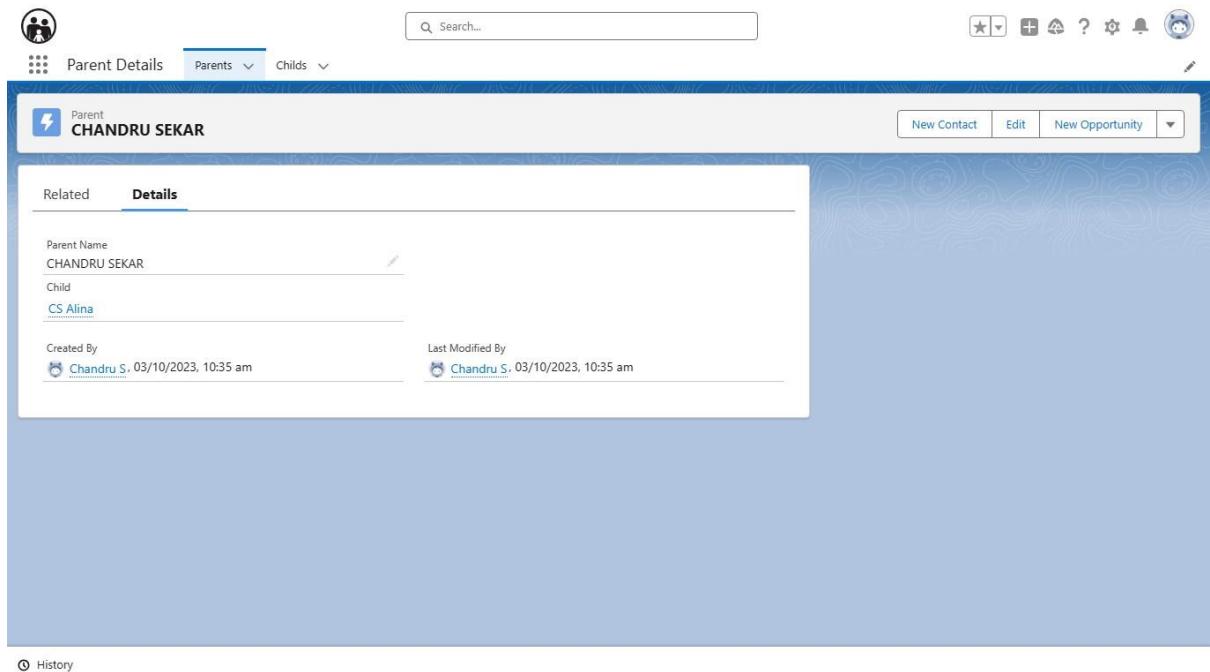
Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details	App Branding
* App Name <input type="text" value="Parent Details"/>	Image <input type="file"/>
* Developer Name <input type="text" value="Chandru s"/>	Primary Color Hex Value <input type="text" value="#0070D2"/>
Description <input type="text" value="Enter a description..."/>	Org Theme Options <input type="checkbox"/> 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.

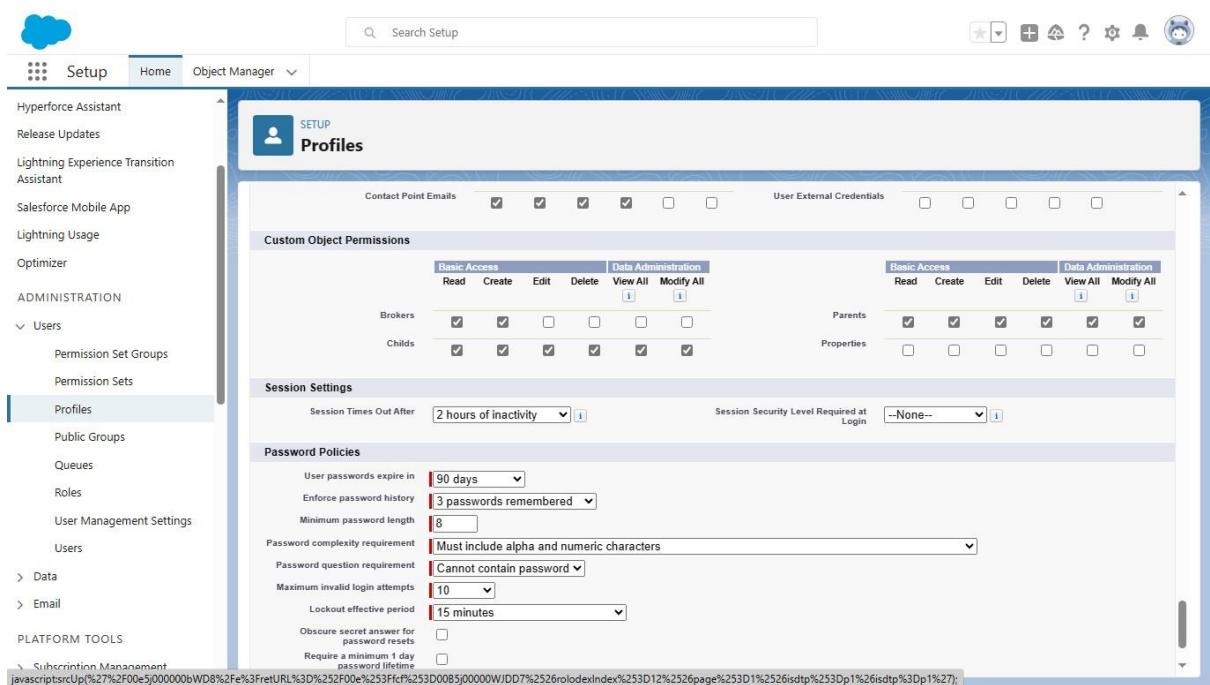
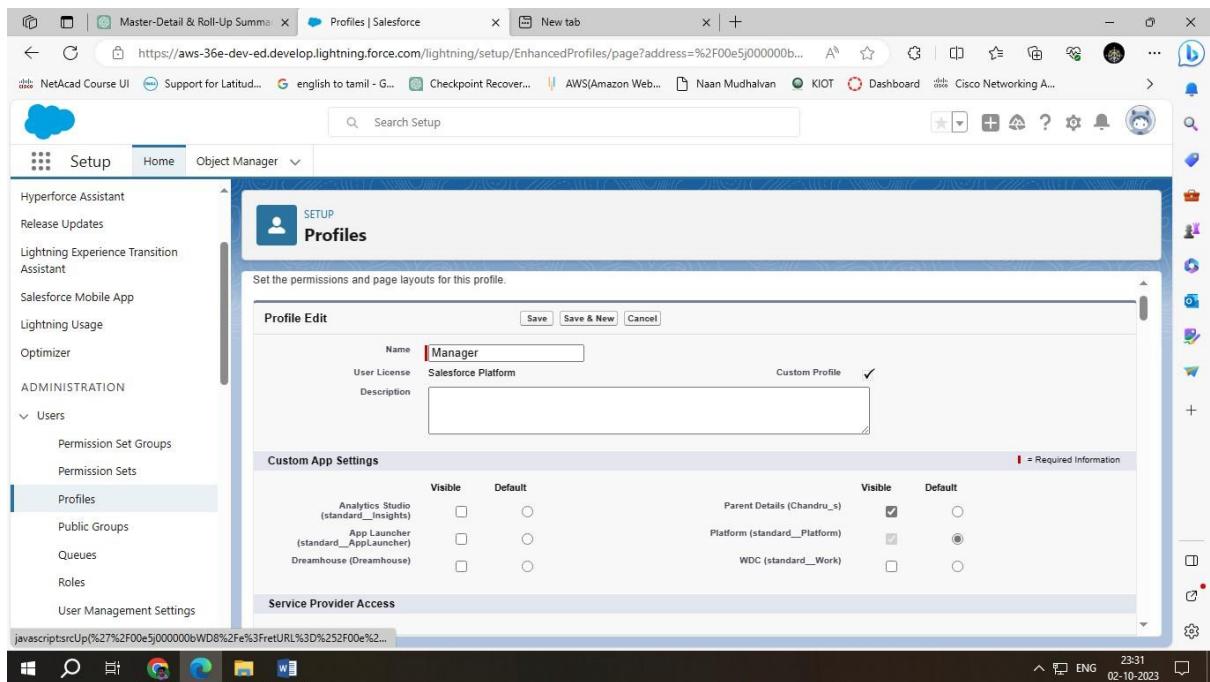
That's it! You've successfully created a Master-Detail relationship between two custom objects (Parent and Child) and set up a Roll-Up Summary Field to calculate the total number of records in the Child object.



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.

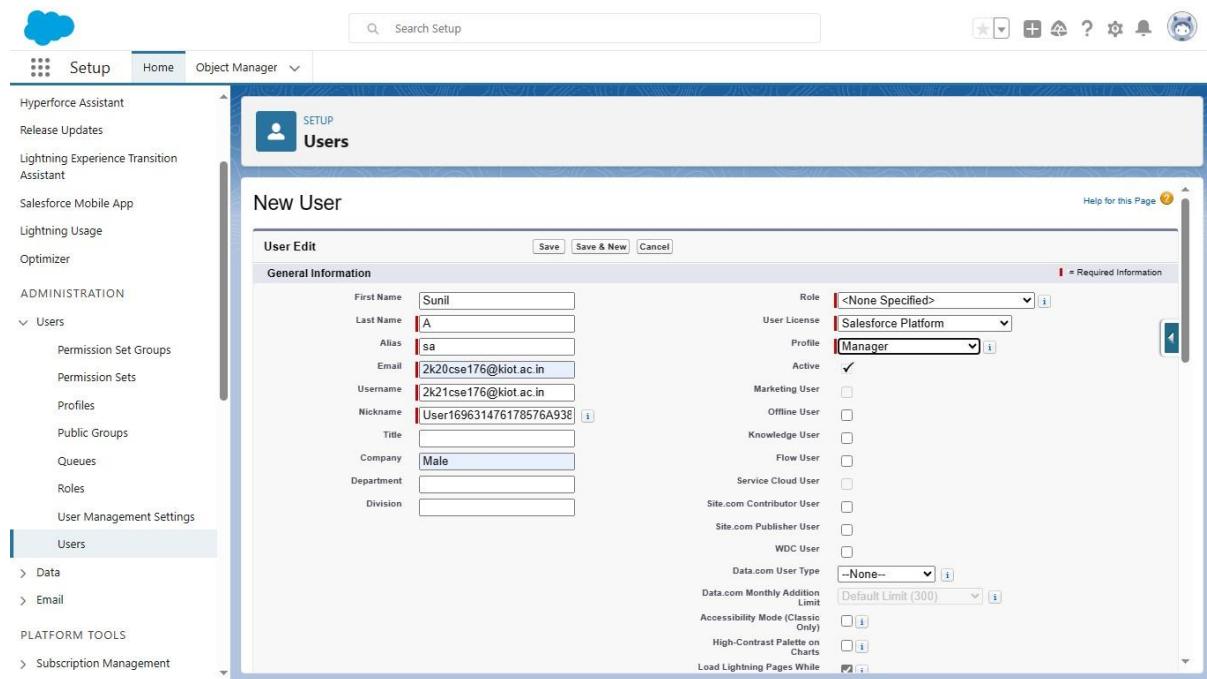


Step 2: Create Criteria-Based Sharing Rules

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.**



The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. The main content area displays the 'User Detail' page for a user named 'Sunil A'. The user's details include:

Name	Sunil A	Role
Alias	sa	User License
Email	2k20cse176@kiot.ac.in [Verify]	Profile
Username	2k21cse176@kiot.ac.in	Active
Nickname	User169631476178576A93816	Marketing User
Title		Offline User
Company	Male	Knowledge User
Department		Flow User
Division		Service Cloud User
Address	2/73 Kankandaipalayam Malasamudram 637503 Tamil Nadu India	Site.com Contributor User
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User
Locale	English (India)	WDC User
Language	English	Mobile Push Registrations
Delegated Approver		Data.com User Type
Manager		Accessibility Mode (Classic Only)
Receive Approval Request Emails	Only if I am an approver	Debug Mode
Expiration ID		Print Contract Palette on Charts

At the top right of the detail page, there is a link to 'User ProfileHelp for this Page'.

The screenshot shows the Gmail inbox with a single email from 'support@salesforce.com'. The subject of the email is 'Welcome to Salesforce: Verify your account'. The email body contains the following text:

Welcome to Salesforce!

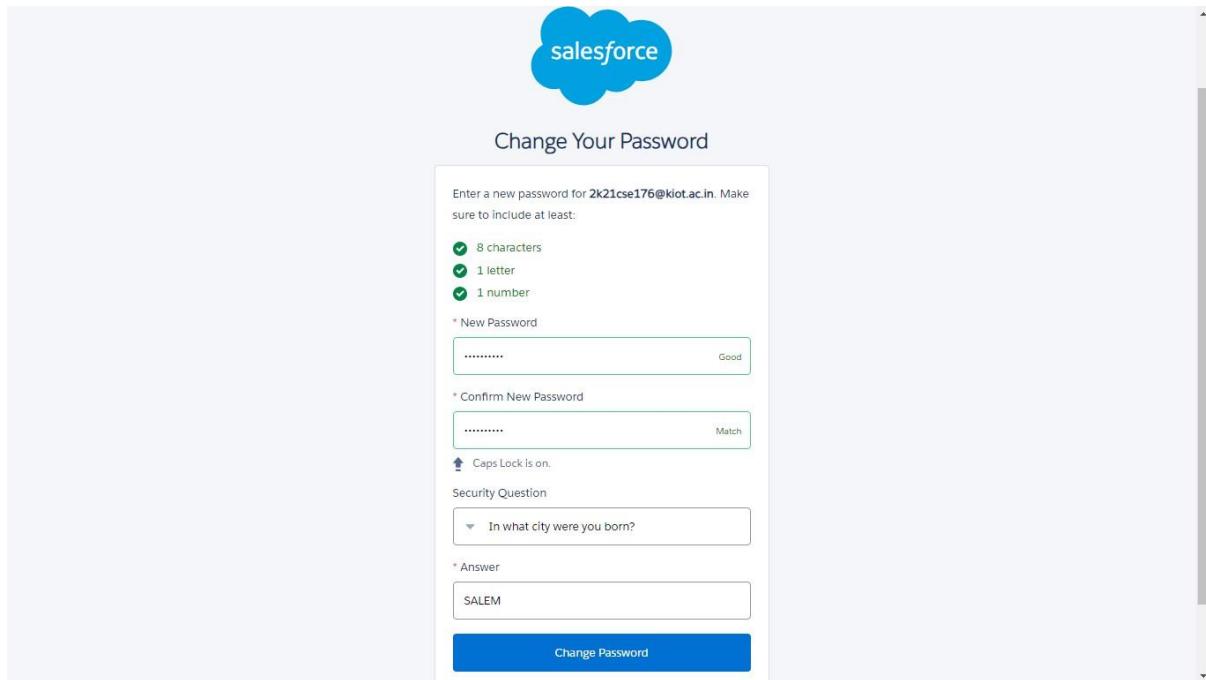
Click below to verify your account.

[Verify Account](#)

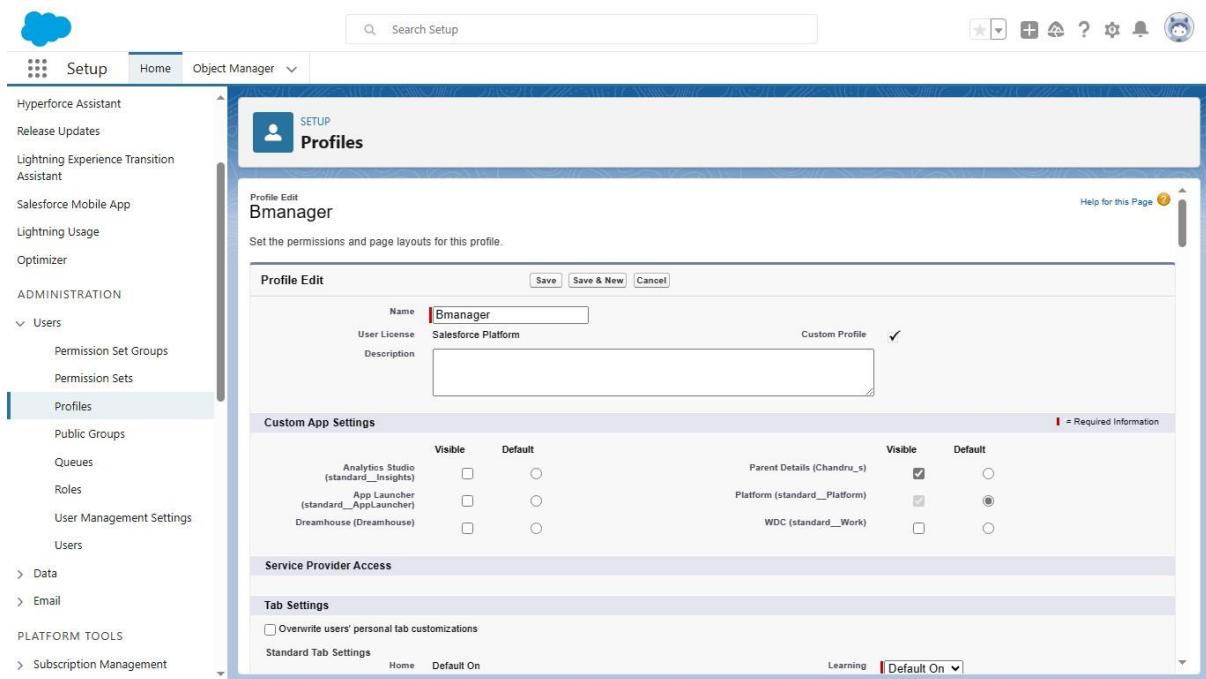
To easily log in later, save this URL:
<https://aws-36e-dev-ed-develop.my.salesforce.com>

Username:
2k21cse176@kiot.ac.in

Again, welcome to Salesforce!



The screenshot shows the "Change Your Password" page from the Salesforce login interface. At the top, there's a blue cloud logo with the word "salesforce". Below it, the title "Change Your Password" is centered. A message box contains instructions: "Enter a new password for 2k21cse176@kiot.ac.in. Make sure to include at least:" followed by three requirements with green checkmarks: "8 characters", "1 letter", and "1 number". The "New Password" field contains "....." and is labeled "Good". The "Confirm New Password" field also contains "....." and is labeled "Match". A note below says "Caps Lock Is on." The "Security Question" field has a dropdown menu showing "In what city were you born?". The "Answer" field contains "SALEM". At the bottom is a large blue "Change Password" button.



The screenshot shows the "Profiles" page in the Salesforce Setup interface. The left sidebar is titled "Setup" and includes sections like "Hyperforce Assistant", "Release Updates", "Lightning Experience Transition Assistant", "Salesforce Mobile App", "Lightning Usage", "Optimizer", "ADMINISTRATION" (with "Users", "Permission Set Groups", "Permission Sets", "Profiles" selected), "Public Groups", "Queues", "Roles", "User Management Settings", and "Users". The main content area is titled "Profiles" and shows a "Profile Edit" for the "Bmanager" profile. The "Profile Edit" form has fields for "Name" (Bmanager), "User License" (Salesforce Platform), "Description" (Custom Profile checked), and "Custom App Settings" for various apps like Analytics Studio, App Launcher, Dreamhouse, Parent Details, Platform, and WDC. It also includes sections for "Service Provider Access" and "Tab Settings". At the bottom right, there are "Learning" and "Default On" buttons.

For User B:

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

4. Save the sharing rule.

The screenshot shows the Salesforce Setup interface. On the left, the navigation sidebar is open, showing categories like Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, and Administration. Under Administration, the Users section is expanded, showing sub-options like Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and Users. The 'Users' option under Administration is selected. The main content area is titled 'New User' and shows the 'User Edit' form. The 'General Information' tab is active. The user details entered are: First Name - Sanjay, Last Name - P, Alias - sp, Email - 2k20cse171@kiot.ac.in, Username - 2k22cse171@kiot.ac.in, Nickname - User1696315620912300622, Title - (empty), Company - (empty), Department - (empty), Division - (empty). The 'Role' dropdown is set to '<None Specified>'. The 'User License' dropdown is set to 'Salesforce Platform'. The 'Profile' dropdown is set to 'Bmanager'. The 'Active' checkbox is checked. Other checkboxes for Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, and WDC User are all unchecked. The 'Data.com User Type' dropdown is set to '-None--'. The 'Data.com Monthly Activity Limit' dropdown is set to 'Default Limit (300)'. The 'Accessibility Mode (Classic Only)' checkbox is unchecked. The 'High-Contrast Palette on Charts' checkbox is unchecked. The 'Load Lightning Pages While' dropdown is set to 'F2'. At the bottom right of the form, there are 'Save', 'Save & New', and 'Cancel' buttons. A note at the top right says 'I = Required Information'.

Step 3: Assign Records Ownership

The screenshot shows the Salesforce Setup interface. The navigation sidebar is identical to the previous screenshot, with the 'Users' option under Administration selected. The main content area is titled 'Permission Sets' and shows the 'Create' form for a new permission set. The 'Enter permission set information' tab is active. The fields filled are: Label - permission, API Name - permission, and Description - (empty). The 'Session Activation Required' checkbox is unchecked. Below this, a section titled 'Select the type of users who will use this permission set' contains the following text: 'Who will use this permission set?'. It includes three bullet points: '-Choose -None-' if you plan to assign this permission set to multiple users with different user and permission set licenses.; '-Choose a specific user license if you want users with only one license type to use this permission set.'; and '-Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.' Below this, a note says 'Not sure what a permission set license is? Learn more here.' The 'License' dropdown is set to '-None--'. At the bottom right of the form, there are 'Save' and 'Cancel' buttons. A note at the top right says 'I = Required Information'.

Permission Set
permission

Object Settings

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	--

Permission Set
permission

Childs

Tab Settings

Available	Visible
<input type="checkbox"/>	<input checked="" type="checkbox"/>

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

Setup Home Object Manager

... > PERMISSION SET PERMISSION > MANAGE ASSIGNMENT EXPIRATION

permission

Select Users to Assign

All Users

1 item selected

Full Name	Role	Username	Profile
Chandru S	CS	au611220104303@naanmudhalvan.com	System Administrator

Chatter Expert Chatter chatty.00d5j00000cismqean.eodfzikbsrf@chatter.salesforce.com Chatter Free User

Integration User integ integration@00d5j00000cismqean.com Analytics Cloud Integration User

Sanjay P sp 2k22cse171@kiot.ac.in Bmanager

Security User sec insightssecurity@00d5j00000cismqean.com Analytics Cloud Security User

Sunil A sa 2k21cse176@kiot.ac.in Manager

C Cancel Next

Subscription Management aws-3fe-dev-ed.develop.lightning.force.com/lightning/r/0055j000009Zv6qAAC/vi...

Setup Home Object Manager

... > PERMISSION SET PERMISSION > MANAGE ASSIGNMENT EXPIRATION

permission

Select an Expiration Option For Assigned Users

No expiration date

Specify the expiration date

Time Zone
Select a time zone...

Selected Users

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

C Cancel Back Assign

Subscription Management aws-3fe-dev-ed.develop.lightning.force.com/lightning/r/0055j000009Zv6qAAC/vi...

Setup Home Object Manager

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
Email
PLATFORM TOOLS
Subscription Management

... > PERMISSIONS permission

1 assignments were successful.

Assignment Summary

Full Name	User License	Expires On	Time Zone	Status
Sunil A	Salesforce Platform			Success

Done

Setup Home Object Manager

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
Email
PLATFORM TOOLS
Subscription Management

Operating Hours Holidays

	No Access	/	--
Opportunities	No Access	26	--
Opportunity_Contact_Role	No Access	6	--
Opportunity_Product	No Access	14	--
Order_Products	No Access	15	--
Orders	No Access	33	--
Parents	No Access	4	--
Party_Concents	No Access	18	--
Payment_Authorization_Adjustments	No Access	24	--
Payment_Authorizations	No Access	30	--
Payment_Gateway_Logs	No Access	--	--
Payment_Gateways	No Access	6	--
Payment_Groups	No Access	1	--
Payment_Line_Invoices	No Access	20	--
Payments	No Access	41	--
Pending_Order_Summaries	No Access	--	--
Pending_Order_Summary_Processed_Events	No Access	--	--
Price_BookEntries	No Access	9	--
Price_Books	No Access	6	--
Privacy_Concents	No Access	--	--
Problem_Related_Items	No Access	10	--
Problems	No Access	21	--
Process_Cart_Pricing_Events	No Access	--	--
Process_Cart_Pricing_Response_Events	No Access	--	--
Process_Exceptions	No Access	12	--
Product_Attributes	No Access	3	--
Product_Attribute_Set_Products	No Access	2	--

Setup Home Object Manager

Permission Sets

Permission Set permission

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

Permission Set Overview > Object Settings Parents

Parents Save Cancel

Tab Settings

Available	Visible
<input type="checkbox"/>	<input checked="" type="checkbox"/>

Object Permissions

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

Field Permissions

Field Name	Read Access	Edit Access
Child	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Created By	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Video Tutorial | Help for this Page

Subscription Management https://aws-36e-dev-ed.develop.my.salesforce.com/one/one.app#/alohaRedirect/0P55j000007Uxoi/e?i=EntityPermissions&o=011j000002rl5H&isdt=p1

Setup Home Object Manager

... > PERMISSION SET 'PERMISSION' > MANAGE ASSIGNMENT EXPIRATION

permission

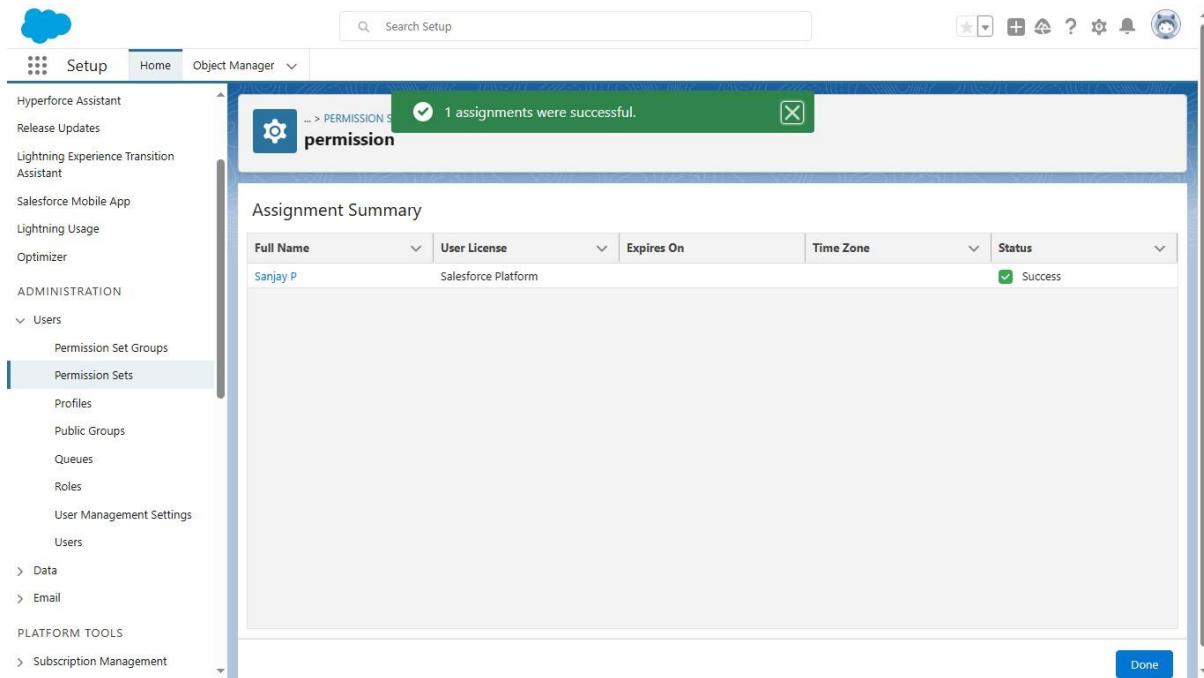
Select Users to Assign

All Users

1 item selected

Full Name	Ali...	Username	Role	Ac...	Profile
Chandru S	CS	au611220104303@naanmudhalvan.com	<input checked="" type="checkbox"/>		System Administrator
Chatter Expert	Chatter	chatty.00d5j00000cismqean.eodffzikbsrf@chatter.salesforce.com	<input checked="" type="checkbox"/>		Chatter Free User
Integration User	integ	integration@00d5j00000cismqean.com	<input checked="" type="checkbox"/>		Analytics Cloud Integration User
Sanjay P	sp	2k22cse171@kiot.ac.in	<input checked="" type="checkbox"/>		Bmanager
Security User	sec	insightssecurity@00d5j00000cismqean.com	<input checked="" type="checkbox"/>		Analytics Cloud Security User

Search this list...



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.

Users

All Users

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	A_Sunil	s8	2k21cs176@kiot.ac.in		<input checked="" type="checkbox"/>	Manager
Edit	Chatter Expert	Chatter	chatty.00d500000cismgean.eodfzlikibsr@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
Edit	P_Sanjay	98	2k22cs171@kiot.ac.in		<input checked="" type="checkbox"/>	BManager
Edit	S_Chandru	CS	su611220104303@naanmudhalvan.com		<input checked="" type="checkbox"/>	System Administrator
Edit	User_Integration	integ	integration@00d500000cismgean.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
Edit	User_Security	sec	insightsecurity@00d500000cismgean.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

Profiles

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

The screenshot shows the Salesforce Setup interface with the 'Profiles' page selected. The left sidebar includes links for Optimizer, Administration (Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, Users), Data, Email, and Platform Tools (Subscription Management, Apps, Feature Settings, Slack, MuleSoft, Einstein). The main content area displays the 'Clone Profile' screen, which prompts the user to enter the name of the new profile ('Manager') and select an existing profile to clone from ('Standard Platform User'). A note indicates that cloning is not possible if the target profile has a different user license or is a custom profile.

The screenshot shows the Salesforce Setup interface with the 'Profiles' page selected. The left sidebar includes links for Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, and Administration (Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings). The main content area displays the 'Profile Detail' screen for the 'chan' profile. It shows the profile's name ('chan'), user license ('Salesforce Platform'), and creation details ('Created By: Chandru S., 03/10/2023, 1:50 pm'). The 'Page Layouts' section lists various standard object layouts assigned to the profile, such as Global Layout for Email Application and Home Page Default for Home Page Layout.

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Hyperforce Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

ADMINISTRATION

Users

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

Cloud

Search Setup

Home Object Manager

SETUP Profiles

Basic Access Data Administration

	Read	Create	Edit	Delete	View All	Modify All
Brokers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Childs	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Parents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Properties	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

User passwords expire in: 90 days

Enforce password history: 3 passwords remembered

Minimum password length: 8

Password complexity requirement: Must include alpha and numeric characters

Password question requirement: Cannot contain password

Maximum invalid login attempts: 10

Lockout effective period: 15 minutes

Obscure secret answer for password resets

Require a minimum 1 day password lifetime

Don't immediately expire links in forgot password emails

Save Save & New Cancel

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Hyperforce Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

ADMINISTRATION

Users

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

Cloud

Search Setup

Home Object Manager

SETUP Profiles

Profile Edit chan

Help for this Page

Name: chan

User License: Salesforce Platform

Description:

Custom Profile:

Custom App Settings

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

Service Provider Access

Tab Settings

Overwrite users' personal tab customizations

Standard Tab Settings: Home Default On

Learning Default On

The screenshot shows the Salesforce Lightning Experience interface. The left sidebar is titled 'ADMINISTRATION' and includes sections for 'Users' (selected), 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', and 'Data', 'Email', 'Platform Tools', 'Subscription Management', 'Apps', 'Feature Settings', 'Slack', 'MuleSoft', and 'Einstein'. The main content area is titled 'SETUP Users All Users'. It displays a table of users with columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The table lists several users, including 'A_Sunil' (Role: Manager, Active: checked), 'Chatter Expert' (Role: Chatter Free User, Active: checked), 'P_Sanjay' (Role: Manager, Active: checked), 'S_Chandru' (Role: System Administrator, Active: checked), 'User_Integration' (Role: Analytics Cloud Integration User, Active: checked), and 'User_Security' (Role: Analytics Cloud Security User, Active: checked). Buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users' are at the top of the table.

The screenshot shows the Salesforce Setup interface. The left sidebar is identical to the one in the top screenshot. The main content area is titled 'SETUP Users New User'. It shows a 'User Edit' form with tabs for 'General Information', 'Profile', 'Permissions', 'Licenses', and 'Advanced'. The 'General Information' tab is active, displaying fields for First Name (Sunil), Last Name (A), Alias (sa), Email (2k20cse176@kiot.ac.in), Username (2k20cse176@kiot.ac.in), Nickname (User1696321490080232961), Title, Company (Male), Department, and Division. On the right side, there are sections for Role (<None Specified>, Salesforce Platform, chan, Active checked), Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Data.com User Type (None, Default Limit (300)), Accessibility Mode (Classic Only, High-Contrast Palette on Charts), and Load Lightning Pages While.

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. The main content area displays the 'User Detail' page for a user named 'Sunil A'. The page includes fields for Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, Language, Delegated Approver, Manager, Receive Approval Request Emails, and Preference ID. It also lists various roles and user licenses. A 'Help for this Page' link is located in the top right corner.

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. The main content area displays the 'User Edit' page for a user named 'Sunil A'. The page includes fields for First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Role, User License, Profile, Active status, Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Mobile Push Registrations, Data.com User Type, Accessibility Mode, Debug Mode, and High-Contrast Palette on Charts. A 'Help for this Page' link is located in the top right corner.

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

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

The screenshot shows the Salesforce Setup interface. The left sidebar is titled "Setup" and includes sections for Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, and ADMINISTRATION. Under ADMINISTRATION, there are sub-sections for Permission Set Groups, Permission Sets (which is selected), Profiles, Public Groups, Queues, Roles, and User Management Settings. The main content area is titled "Permission Sets" and shows a "Permission Set Overview" for "permission01". The "Edit Properties" dialog is open, showing fields for Label (set to "permission01"), API Name (set to "permission01"), Description (empty), Session Activation Required (unchecked), and Activation Required (unchecked). Below the properties, there are sections for "App Permissions", "Apex Class Access", "Visualforce Page Access", and "External Data Source Access".

The screenshot shows the Salesforce Setup interface, identical to the one above but with a different focus. The left sidebar is the same, showing the "Permission Sets" section is selected. The main content area is titled "Permission Sets" and shows the "Permission Set Overview" for "permission01". The "Object Settings" tab is selected, and the "Accounts" tab is active. Under "Object Permissions", there is a table for "Accounts" with columns for "Permission Name" (Read, Create, Edit, Delete, View All, Modify All) and "Enabled" status. Under "Field Permissions", there is a table for "Account" with columns for "Field Name" (Account Name, Account Number, Account Owner, Account Site, Account Source, Active, Annual Revenue) and "Read Access" and "Edit Access" checkboxes.

The screenshot shows the Salesforce Setup interface with the 'Permission Sets' page open. The left sidebar is collapsed, and the main content area displays the 'permission01' permission set. The 'Accounts' tab is selected under 'Object Permissions'. The 'Object Permissions' table shows the following 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"/>

Below this, the 'Field Permissions' section is visible, showing permissions for various account fields.

The screenshot shows the Salesforce Setup interface with the 'All Users' page open. The left sidebar is collapsed, and the main content area displays a list of users. Two users are selected: 'Sunil A' and 'Sunil A'. The user list includes the following entries:

Full Name	Role	Ac...	Profile
Chandru S	CS	au611220104303@naanmudhalvan.com	System Administrator
Chatter Expert	Chatter	chatty.00d5j00000cismqean.eodfzikibsf@chatter.salesforce.com	Chatter Free User
Integration User	integ	integration@00d5j00000cismqean.com	Analytics Cloud Integration User
Sanjay P	sp	2k22cse171@kiot.ac.in	Bmanager
Security User	sec	insightssecurity@00d5j00000cismqean.com	Analytics Cloud Security User
Sunil A	sa	2k21cse176@kiot.ac.in	chan
Sunil A	sa	2k23cse176@kiot.ac.in	chan

At the bottom of the list, there are 'Cancel' and 'Next' buttons.

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

The screenshot shows the Salesforce Setup interface after the assignment. The main content area has a green success message banner at the top: '→ PERMISSION SETS 2 assignments were successful.' The banner also features a gear icon and the name 'permission01'. Below the banner is the 'Assignment Summary' section, which displays a table of assigned users. The table columns are: Full Name, User License, Expires On, Time Zone, and Status. Two users, 'Sunil A' and 'sunil A', are listed under 'User License: Salesforce Platform'. Both entries have a green checkmark in the 'Status' column, indicating success. At the bottom right of the content area is a 'Done' button.

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

Step 1: Create a custom object

1. Click Setup.
2. In the Object Manager, click Create | Custom Object.
3. Now create a custom object Survey Result and fields as shown in the screenshot below:
4. Click Save.

The screenshot shows the Salesforce Object Manager interface. At the top, it says "SETUP > OBJECT MANAGER" and the object name is "Survey Result". Below the header, there's a "Fields & Relationships" section. On the left, a sidebar lists various object types: 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 displays the "Fields & Relationships" table with the following data:

Fields & Relationships		FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Page Layouts		Comment	Comment__c	Text Area(255)		
Lightning Record Pages		Created By	CreatedById	Lookup(User)		
Buttons, Links, and Actions		Email	Email__c	Email		
Compact Layouts		Last Modified By	LastModifiedById	Lookup(User)		
Field Sets		Name	Name__c	Text(51)		
Object Limits		Owner	OwnerId	Lookup(User,Group)	✓	
Record Types		Rating	Rating__c	Picklist		
Related Lookup Filters		Survey Result Name	Name	Auto Number	✓	
Search Layouts						
Search Layouts for Salesforce Classic						
Triggers						
Validation Rules						

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

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

Email Template
Thank You Email - Survey

Details Related

Information

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

Message Content

Subject Thank You For Completing Our Survey!	Enhanced Letterhead
HTML Value	<p>Hi {{Survey_Result__c.Name__c}},</p> <p>Thanks for taking time out to participate in our survey. We are very appreciative of the time you have taken to assist in our analysis, and commit to utilizing the information gained to contemplate and implement worthwhile improvements. We will share these results with you through your State Survey Agency, whom we also thank for their generous participation.</p> <p>Once again, we are extremely grateful for your contributing your valuable time, your honest information, and your thoughtful suggestions.</p> <p>Thanks, Automation Champion</p>

Additional Information

Created By Rakesh Gupta, 12/21/2020, 4:23 PM	Last Modified By Rakesh Gupta, 12/21/2020, 4:32 PM
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Step 3: Create an Email Alert

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

8.Click Save.

Survey - Thank You Email

Description: Survey - Thank You Email

Unique Name: Survey_Thank_You_Email

Object: Survey Result

Email Template: Thank You Email - Survey

Protected Component:

Recipient Type: Search: User for:

Recipients:

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

Add Remove

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

Additional Emails

From Email Address: Current User's email address

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

Save Save & New Cancel

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

- 1.Click Setup.
- 2.In the Quick Find box, type Flows.
- 3.Select Flows then click on the New Flow.
- 4.Select the Screen Flow option and click on Next and configure the flow as follows:
- 5.How do you want to start building: Freeform
- 6.We will use the Screen element to capture a Survey response form. Drag and drop a Screen element onto the canvas.

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

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

Row 1:

Field: Comment__c

Value: {!Comment}

Click Add Row

Row 2:

Field: Email__c

Value: {!Email.value}

Click Add Row

Row3:

Field: Name__c

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

Click Add Row

Row 3:

Field: Rating__c

Value: {!Rating}

7.Click Done.

Edit Create Records

Create Salesforce records using values from the flow.

*Label <input type="text" value="Save Response"/>	*API Name <input type="text" value="Save_Response"/>
Description <input type="text"/>	
How Many Records to Create <input checked="" type="radio"/> One <input type="radio"/> Multiple	
How to Set the Record Fields <input type="radio"/> Use all values from a record <input checked="" type="radio"/> Use separate resources, and literal values	
Create a Record of This Object	
*Object <input type="text" value="Survey Result"/>	
Set Field Values for the Survey Result	
Field <input type="text" value="Comment__c"/>	Value <input type="text" value="A_a Comment X"/>
Field <input type="text" value="Email__c"/>	Value <input type="text" value="A_a Email > Value X"/>
Field <input type="text" value="Name__c"/>	Value <input type="text" value="={!Name.firstName} {!Name.lastName}"/>
Field <input type="text" value="Rating__c"/>	Value <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	* API Name
Send Thank You Email	Send_Thank_You_Email
Description	
<input type="text"/>	

Set Input Values

A _a * Record ID	{!Save_Response}
----------------------------	------------------

Save as

A New Version	A New Flow	
* Flow Label <input type="text" value="Survey"/>	* Flow API Name <input type="text" value="Survey"/>	
Description <input type="text"/>		
Hide Advanced		
How to Run the Flow ⓘ <input type="text" value="User or System Context—Depends on How Flow is Launched"/>		
* Type <input type="text" value="Screen Flow"/>		
* API Version for Running the Flow <input type="text" value="51"/>		
Interview Label ⓘ <input type="text" value="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.

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

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

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

- 1.Click Setup.
- 2.In the Quick Find box, type Sites.
- 3.Clicks on the New button.
- 4.Fill the details as per the screenshot below:
- 5.Click Save.

Site Edit

Save **Cancel**

Site Label	Survey 
Site Name	Survey 
Site Description	
Site Contact	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	 
Site Favorite Icon	 
Analytics Tracking Code	 
URL Rewriter Class	  
Enable Feeds	<input type="checkbox"/>
Clickjack Protection Level	Allow framing by the same origin only (Recommended)  
Require Secure Connections (HTTPS)	<input checked="" type="checkbox"/> 
Lightning Features for Guest Users	<input checked="" type="checkbox"/> 
Upgrade all requests to HTTPS	<input checked="" type="checkbox"/> 
Enable Content Sniffing Protection	<input checked="" type="checkbox"/> 
Enable Browser Cross Site Scripting Protection	<input checked="" type="checkbox"/> 
Referrer URL Protection	<input checked="" type="checkbox"/> 
Guest Access to the Payments API	<input type="checkbox"/> 

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

Proof of Concept

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

Survey

Name

First Name

Alok

Last Name

Sinfal

*Email

*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.