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Salesforce Developer(Course)
Assignment No 1

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Year & Dep : 4th 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_C" and "C Department_C". If you haven't already created these objects, you can do so by going to Setup > Object Manager > Create > Custom Object.

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

- Header:** Search bar with "Search Setup", a gear icon, and other navigation links.
- Page Title:** SETUP / New Custom Object
- Section: Custom Object Definition Edit**
 - Custom Object Information:** Singular Label: "College", Plural Label: "Colleges", Starts with vowel sound:
 - Object Name:** Object Name: "College", Example: "Account"
 - Description:** A large text area for description.
 - Context-Sensitive Help Setting:** Open the standard Salesforce.com Help & Training window (radio button selected).
 - Content Name:** None
- Section: Enter Record Name Label and Format**
 - Record Name:** Record Name: "College Name", Example: "Account Name"
 - Data Type:** Text (dropdown menu)
- Section: Optional Features**
 - Allow Reports
 - Allow Activities
 - Track Field History
 - Allow in Chatter Groups
 - Enable Licensing
- Section: Object Classification**
 - When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more](#).
 - Allow Sharing
 - Allow Bulk API Access
 - Allow Streaming API Access
- Section: Deployment Status**
 - In Development
 - Deployed
- Section: Search Status**
 - When this setting is enabled, your users can find records of this object type when they search. [Learn more](#).
 - Allow Search
- Section: Object Creation Options (Available only when custom object is first created)**
 - Add Notes and Attachments related list to default page layout
 - Launch New Custom Tab Wizard after saving this custom object

At the bottom right of the form are three buttons: Save, Save & New, and Cancel.

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

The screenshot shows the Salesforce Setup interface under the Object Manager tab. A message at the top indicates that permissions for the object are disabled by default. The 'Custom Object Definition Edit' page is displayed, with the 'Label' field set to 'Department' and the 'Plural Label' field set to 'Departments'. The 'Object Name' field also contains 'Department'. Other fields like 'Description' and 'Content Name' are left blank. The 'Record Name' field is set to 'Department Name' and 'Data Type' is 'Text'. Under 'Optional Features', 'Allow Reports' and 'Allow Activities' are checked. In the 'Object Classification' section, 'Allow Sharing', 'Allow Bulk API Access', and 'Allow Streaming API Access' are checked. The 'Deployment Status' is set to 'Deployed'. The 'Search Status' is enabled. Under 'Object Creation Options', 'Add Notes and Attachments related list to default page layout' is checked. At the bottom, there are 'Save', 'Save & New', and 'Cancel' buttons.

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__c" 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 __c."
7. Choose "Department__c" 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

The screenshot shows the Salesforce Object Manager interface for the 'department' object. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main header says 'SETUP > OBJECT MANAGER' and 'department'. On the left, a sidebar lists various configuration tabs: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, Scoping Rules, Triggers, Flow Triggers, and Validation Rules. The 'Fields & Relationships' tab is selected. The main content area is titled 'Details' and contains fields for API Name ('department__c'), Singular Label ('department'), Plural Label ('departments'), Description, Enable Reports, Track Activities, Track Field History, Deployment Status ('Deployed'), Help Settings, and Standard salesforce.com Help Window. At the bottom right are 'Edit' and 'Delete' buttons.

The screenshot shows the Salesforce Object Manager interface for the 'department' object, specifically on the 'Fields & Relationships' tab. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main header says 'SETUP > OBJECT MANAGER' and 'department'. The sidebar on the left is identical to the previous screenshot. The main content area is titled 'New Relationship' and 'Step 6 of 6'. It shows a configuration for a Master-Detail relationship named 'collage'. The 'Field Label' is 'collage', 'Data Type' is 'Master-Detail', 'Field Name' is 'collage', and there is a 'Description' field. Below this, it says 'Specify the title that the related list will have in all of the layouts associated with the parent.' with a 'Related List Label' input field containing 'departments'. A note states 'These are the page layouts that will include this field. Because this is a Master-Detail relationship, the field is required.' Below this are sections for 'Add Related List' (with 'Page Layout Name' 'collage Layout' checked) and 'Append related list to users' existing personal customizations' (with a checked checkbox). At the bottom are 'Previous', 'Save & New', 'Save', and 'Cancel' buttons.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
collage	collage_c	Master-Detail(collage)		✓
Created By	CreatedById	Lookup(User)		
department Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		

Step 3: Create the Roll-Up Summary Field

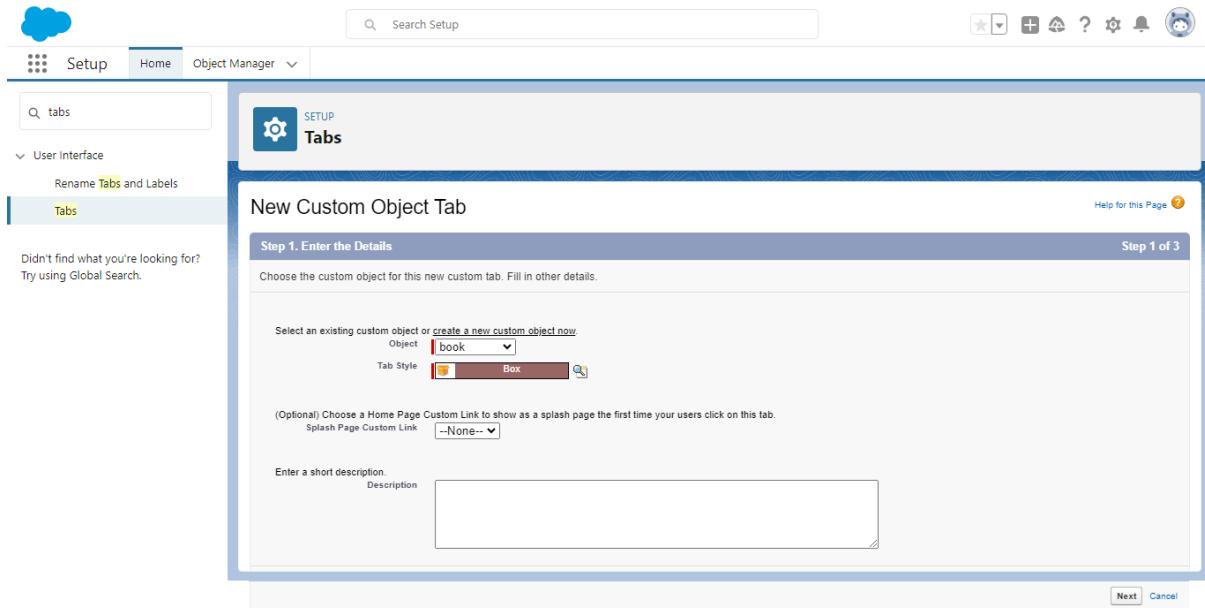
Now, let's create a Roll-Up Summary Field on the "College_C" to calculate the total number of related records in "Department__C":

1. Still on the "College_c" 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__c" 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.

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. A sidebar on the left lists various setup categories under 'Fields & Relationships'. The main content area is titled 'New Custom Field' and is on 'Step 5 of 5'. The field being configured is named 'total count' with a data type of 'Roll-Up Summary'. The 'Page Layouts' section is open, showing 'collage Layout' selected. Buttons at the bottom include 'Previous', 'Save & New', 'Save', and 'Cancel'.

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. A sidebar on the left lists various setup categories under 'Fields & Relationships'. The main content area displays a table of fields for the 'collage' object. The table includes columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are:

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



Step 4: Create a Lightning App

1. Type and select "App Manager."
2. Click "New Lightning App."
3. Fill in basic information (Name, Developer Name, Description).
4. Choose the App Type (Standard, Console, Custom).
5. Customize the Logo and Colour Scheme.
6. Configure Navigation Items (objects to appear in the app's menu).
7. Set the App Visibility (default access).
8. Optionally, choose Record Pages (Lightning Record Pages).
9. Review and Save the app.

10. Assign the app to users or profiles.

11. Test the app with the assigned users.

New Lightning App

App Details & Branding

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

App Details

* App Name

* Developer Name

Description

App Branding

Image

Primary Color Hex
Value #0070D2

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

App Launcher Preview

Next

Lightning Experience App Manager

22 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type

App Name	Developer Name	Description	Last Modified ...	Ap...	Vi...
All Tabs	AllTabSet		22/08/2023, 10:48 am	Classic	<input type="button" value="Edit"/>
Analytics Studio	Insights	Build CRM Analytics dashboards and apps	22/08/2023, 10:48 am	Classic	<input type="button" value="Edit"/>
App Launcher	AppLauncher	App Launcher tabs	22/08/2023, 10:48 am	Classic	<input type="button" value="Edit"/>
Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your ind...	22/08/2023, 10:51 am	Lightning	<input type="button" value="Edit"/>
Community	Community	Salesforce CRM Communities	22/08/2023, 10:48 am	Classic	<input type="button" value="Edit"/>
Content	Content	Salesforce CRM Content	22/08/2023, 10:48 am	Classic	<input type="button" value="Edit"/>
Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage r...	22/08/2023, 10:48 am	Lightning	<input type="button" value="Edit"/>
Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	22/08/2023, 10:48 am	Lightning	<input type="button" value="Edit"/>
Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	22/08/2023, 10:48 am	Lightning	<input type="button" value="Edit"/>
Marketing	Marketing	Best-in-class on-demand marketing automation	22/08/2023, 10:48 am	Classic	<input type="button" value="Edit"/>
My Collage	My_Collage		03/10/2023, 11:35 am	Lightning	<input type="button" value="Edit"/>
Platform	Platform	The fundamental Lightning Platform	22/08/2023, 10:48 am	Classic	<input type="button" value="Edit"/>
Queue Management	QueueManagement	Create and manage queues for your business.	22/08/2023, 10:48 am	Lightning	<input type="button" value="Edit"/>
Sales	Sales	The world's most popular sales force automation (SFA) solution	22/08/2023, 10:48 am	Classic	<input type="button" value="Edit"/>
Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, ...	22/08/2023, 10:48 am	Lightning	<input type="button" value="Edit"/>
Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple record...	22/08/2023, 10:48 am	Lightning	<input type="button" value="Edit"/>
Salesforce Chatter	Chatter	The Salesforce Chatter social network, including profiles and fe...	22/08/2023, 10:48 am	Classic	<input type="button" value="Edit"/>
Salesforce Scheduler	LightningScheduler	Set up personalized appointment scheduling.	22/08/2023, 10:50 am	Lightning	<input type="button" value="Edit"/>
Service	Service	Manage customer service with accounts, contacts, cases, and m...	22/08/2023, 10:48 am	Classic	<input type="button" value="Edit"/>
Service Console	LightningService	(Lightning Experience) Lets support agents work with multiple r...	22/08/2023, 10:48 am	Lightning	<input type="button" value="Edit"/>
Site.com	Sites	Build pixel-perfect, data-rich websites using the drag-and-drop ...	22/08/2023, 10:48 am	Classic	<input type="button" value="Edit"/>
Subscription Manager	RevenueCloudConsole	Get started automating your revenue processes	22/08/2023, 10:48 am	Lightning	<input type="button" value="Edit"/>

The screenshot shows the Salesforce Setup interface with the 'Tabs' page selected. The 'Custom Tabs' section is active, displaying a table of custom object tabs. The table has columns for Action, Label, Tab Style, and Description. The tabs listed are:

Action	Label	Tab Style	Description
Edit Del	books	Box	
Edit Del	colleges	Heart	
Edit Del	departments	Building	
Edit Del	students	Diamond	

Below this are sections for 'Web Tabs', 'Visualforce Tabs', 'Lightning Component Tabs', and 'Lightning Page Tabs', each with a note indicating none have been defined.

Conclusion:

Now, whenever you create or update a record in the "Department__c" related to a "College__c," the "TotalCount__c" field on the "College__c" will automatically update to show the total number of related records.

Remember to adjust field-level security, validation rules, and page layouts as needed to ensure that your custom objects and fields are appropriately configured for your organization's requirements.

The screenshot shows a browser window with a Salesforce Lightning record creation dialog. The dialog is titled 'New college' and is for the 'college' object. It contains the following fields:

- Information
 - college Name: kiot
 - phone: 9087116402
 - Email: kiot@ac.in
 - Location
 - Latitude: 90
 - Longitude: 80
- Owner: krishna s

At the bottom of the dialog are 'Cancel', 'Save & New', and 'Save' buttons. The background shows a list of colleges with a 'Recently Viewed' section.

My college colleges CDepartments student Content

CDepartments Recently Viewed

1 item • Updated a few seconds ago

Department Name
cse

New Import

History

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

Solution:

Step 1: Create two separate custom profiles, one for User A and one for User B.

Setup Home Object Manager

Q, pro

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

Profiles

All Profiles Edit | Delete | Create New View

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit Del ... venkatal	Analytics Cloud Integration User	✓	✓
<input type="checkbox"/> Edit Del ... venkatt	Analytics Cloud Integration User	✓	✓

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

1-2 of 2 0 Selected

Help for this Page

Page 1 of 1

All Users

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

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty@00d500000cirfheavffeloywicndv@chatter.salesforce.com	✓	✓	Chatter Free User
<input type="checkbox"/> Edit	S_DharunKumar	Dharun	2k20it56@kiot.ac.in	✓	✓	Work.com Only User
<input type="checkbox"/> Edit	S_Venkatesan	VS	venkatesans@caanmudalvan.com	✓	✓	System Administrator
<input type="checkbox"/> Edit	S_Venkatesan	venky	2k20it43@kiot.ac.in	✓	✓	Work.com Only User
<input type="checkbox"/> Edit	User_Integration	integ	integration@00d500000cirfheav.com	✓	✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightsssecurity@00d500000cirfheav.com	✓	✓	Analytics Cloud Security User

Change Your Password

Enter a new password for 2k20csit@kiot.ac.in. Make sure to include at least:

- 8 characters
- 1 letter
- 1 number

* New Password

..... Good

* Confirm New Password

..... Match

Security Question

In what city were you born?

Answer

india

Change Password

Password was last changed on 01/10/2023, 7:24 pm.

Recently Viewed

0 items • Updated a few seconds ago

Bank Name
You haven't viewed any Bank recently. Try switching list views.

Step 2:

Permission Sets:

- Create two permission sets, one for User A and one for User B.

Object-Level Security:

- In each profile and permission set, set the object-level security for the Account object to "Read" to ensure that both User A and User B 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 User A with User A and records owned by User B with User B.
- For the sharing rule criteria, specify that records owned by User A are shared with User A, and records owned by User B are shared with User B.

Ownership:

- Ensure that the Account records are owned by the respective users, with User A owning their records and User B 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 User A and User B separately to verify that they cannot

access each other's records.

The screenshot shows the Salesforce 'Permission Sets' page within the Setup interface. The left sidebar navigation includes 'User Management Settings' (Profiles, Public Groups, Queues, Roles), 'Feature Settings' (Data.com, Service, Embedded Service, User Interface), and 'Actions & Recommendations'. The main content area displays a table of permission sets with columns for Action, Permission Set Label, Description, and License. A specific row for 'Access supervisor features in Service Cloud Voice contact centers th...' is highlighted with a blue background. The table includes links for New, Edit, Delete, and Create New View. A navigation bar at the bottom shows '1-25 of 29' and '0 Selected'. The top of the page has a search bar and various browser tabs.

Action	Permission Set Label	Description	License
<input type="checkbox"/>	Access to activiti...	Includes all Buyer capabilities, and allows access to manage carts an...	B2B Buyer Permission Set One Seat
<input type="checkbox"/>	Buyer	Allows access to the store. Lets users see products and categories. ...	B2B Buyer Permission Set One Seat
<input type="checkbox"/>	Buyer Manager	Includes all Buyer capabilities, and allows access to manage carts an...	CRM User
<input type="checkbox"/>	CRM User	Denotes that the user is a Sales Cloud or Service Cloud user.	Commerce Admin
<input type="checkbox"/>	Commerce Admin	Allow access to commerce admin features.	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Admin	Manage Service Cloud Voice contact centers that use Amazon Connect.	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Agent	Access agent features in Service Cloud Voice contact centers that us...	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Supervisor	Access supervisor features in Service Cloud Voice contact centers th...	Salesforce
<input type="checkbox"/>	Experience Profile Manager	Lets users create, read, edit, and delete locations, publications, que...	Facility Manager
<input type="checkbox"/>	Field Service Mobile Standard PermSet	Give your mobile workforce access to the Field Service mobile app. S...	Field Service Mobile
<input type="checkbox"/>	Merchandiser	Allow access to commerce merchandising features.	Commerce Merchandiser User
<input type="checkbox"/>	Order Management Agent	Read Access to all entities enabled by Order Management	Lightning Order Management User
<input type="checkbox"/>	Order Management Operations Manager	Access to all features enabled by Order Management	Lightning Order Management User
<input type="checkbox"/>	Order Management Shopper	Limited access to Order Management features for Self Service	Lightning Order Management User

Salesforce Developer Session | (128) Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce: Version 44.0 | Reset Password | Salesforce | Finish update

Setup Home Object Manager

user

Users

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

Feature Settings

- Data.com
- Prospector Users

Service

- Embedded Service
- Messaging for In-App and Web User Verification

User Interface

- Action Link Templates
- Actions & Recommendations

App Menu

Search Setup

Help for this Page

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Setup Home Object Manager

user

Users

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

Feature Settings

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- Action Link Templates
- Actions & Recommendations

App Menu

Search Setup

Help for this Page

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Setup Home Object Manager

user

Users

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

Feature Settings

- Data.com
- Prospector Users

Service

- Embedded Service
- Messaging for In-App and Web User Verification

User Interface

- Action Link Templates
- Actions & Recommendations

App Menu

Search Setup

Video Tutorial | Help for this Page

Permission Set Overview

Description	API Name	Namespace Prefix	Created By	Last Modified By
	salesmanager		Gopal S.	01/10/2023, 7:29 pm

Apps

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

Learn More

Salesforce Developer Session | 128 Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce: Version 43.0 | Reset Password | Salesforce | Finish update

The screenshot shows the Salesforce Setup interface under the 'Permission Sets' section. A permission set named 'salesmanager' is selected. The 'Object Settings' tab is active, displaying a table of object permissions. The table includes columns for Object Name, Object Permissions (e.g., No Access), Total Fields, and Tab Settings. Objects listed include Accounts, AI Insight Reasons, AI Record Insights, Alternative Payment Methods, API Anomaly Event Stores, App Analytics Query Requests, Application Usage Assignments, Appointment Categories, Appointment Invitations, Appointment Invitees, Appointment Schedule Aggregates, Appointment Schedule Logs, Appointment Topic Time Slots, Asset Actions, Asset Action Sources, Asset Relationships, Assets, and Asset State Periods.

Salesforce Developer Session | 128 Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce: Version 43.0 | Reset Password | Salesforce | Finish update

This screenshot shows the same Salesforce setup interface, but the 'Object Settings' tab is not visible. Instead, the 'Bank' object settings are displayed. The 'Tab Settings' section shows the 'Available' tab is checked. The 'Object Permissions' section lists permissions for the 'Bank' object, including Read, Create, Edit, Delete, View All, and Modify All. The 'Field Permissions' section shows permissions for specific fields: Bank Name, Created By, and Last Modified By, with checkboxes for Read Access and Edit Access.

Salesforce Developer Session | 128 Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce: Version 42.0 | Reset Password | Salesforce | Finish update

Permission Sets

Permission Set salesmanager

Object Settings Bank

Tab Settings

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

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
Bank Name	<input type="checkbox"/>	<input type="checkbox"/>
Created By	<input type="checkbox"/>	<input type="checkbox"/>
Last Modified By	<input type="checkbox"/>	<input type="checkbox"/>

Salesforce Developer Session | 128 Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce: Version 42.0 | Reset Password | Salesforce | Finish update

salesmanager

... > SETUP > PERMISSION SET 'SALESMANAGER'

Current Assignments

No assignments defined.

Setup | Home | Object Manager | Search Setup

Select Users to Assign

All Users

1 item selected

Full Name ↑	All... ↓	Username	Role	Ac...	Profile
Amelia Ellington	aelli	amelia.ellington.1.46kxcp9oodih.d6cwpdcuo4wh.hnbdwmvwhhq.wguctpr1dalv@gmail.com			Force.com - App Subscription User

Cancel Next

This screenshot shows the 'Select Users to Assign' interface in Salesforce. The sidebar navigation includes 'Setup', 'Home', 'Object Manager', and a search bar. Under 'User Management Settings', 'Users' is selected. The main area displays a list of users under the heading 'All Users'. A single user, 'Amelia Ellington', is selected. The list includes other users like 'Chatter Expert', 'Diya Adanna', 'GOPAL S', 'Integration User', 'madhu b', 'Security User', and 'sowmya bala'. Each user entry shows their full name, initials, username, role, account status, and profile.

Setup | Home | Object Manager | Search Setup

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
madhu b	salesmanage			Salesforce Platform	Never Expires

Cancel Back Assign

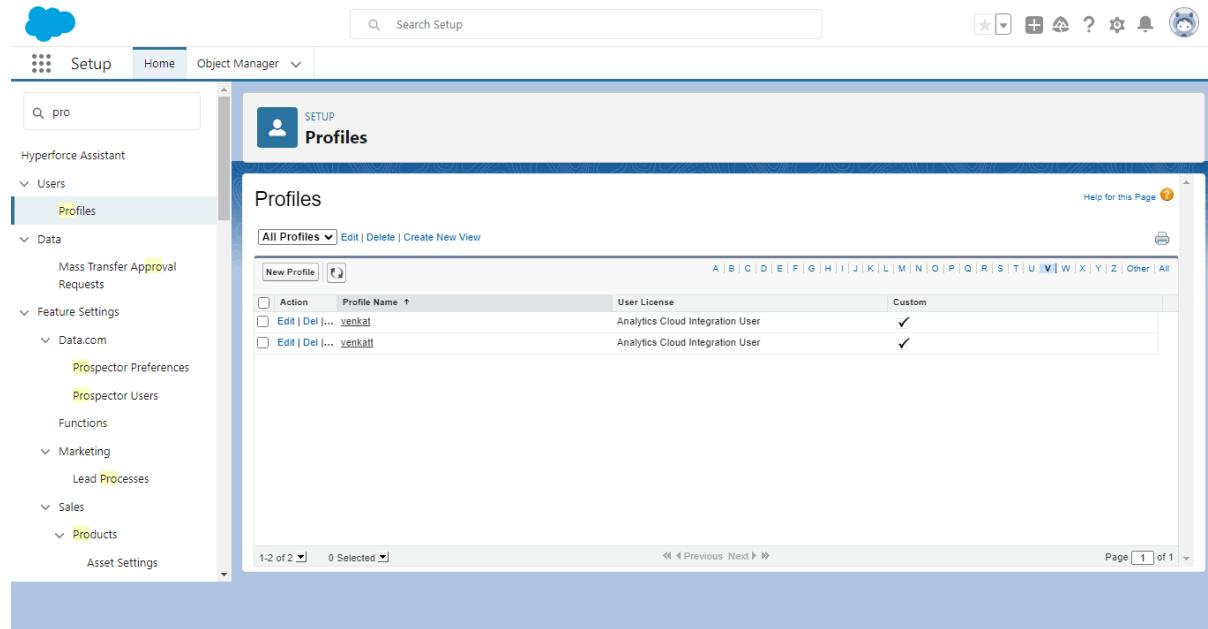
This screenshot shows the 'Select an Expiration Option For Assigned Users' interface. The sidebar navigation is identical to the previous screen. The main area allows selecting an expiration date. It shows a single user, 'madhu b', assigned to the 'salesmanage' role with the 'Salesforce Platform' license and 'Never Expires' set. Buttons for 'Cancel', 'Back', and 'Assign' are at the bottom.

The screenshot displays two browser windows. The top window is the Salesforce Setup interface, specifically the User Management Settings > Users section. A success message box is open, stating "1 assignments were successful." for a permission set named "salesmanager". The bottom window shows a Lightning component titled "Recently Viewed" under the "customers" tab. The component lists "0 items" and includes a note: "You haven't viewed any customers recently. Try switching list views." A context menu is open on the right side of the component, with the "New" option highlighted.

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]



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

- Header:** Search bar with "pro", a cloud icon, and other setup navigation icons.
- Left Sidebar:** Navigation menu with sections like Hyperforce Assistant, Users (Profiles selected), Data, Feature Settings, Data.com, Marketing, Sales, and Products.
- Central Content:** Title "SETUP Profiles". Subtitle "Profiles". Buttons: "All Profiles" dropdown, "Edit | Delete", and "Create New View".
- Table:** A list of profiles:

Action	Profile Name	User License	Custom
<input type="checkbox"/>	venkatt	Analytics Cloud Integration User	<input checked="" type="checkbox"/>
<input type="checkbox"/>	venkatt	Analytics Cloud Integration User	<input checked="" type="checkbox"/>
- Bottom:** Pagination "1-2 of 2" and "0 Selected".

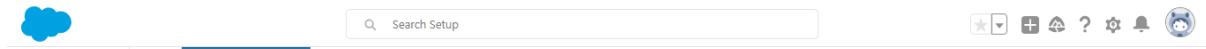
Step 2:

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

Here I had made it my profile name as venkat and the existing profile as Standard Platform User.

Step 3:

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.



Setup | Home | Object Manager

Object Manager

New Custom Object

Help for this Page ⓘ

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more!](#) [Don't show this message again.](#)

Custom Object Definition Edit

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label	<input type="text" value="Collage"/>	Example: Account
Plural Label	<input type="text" value="Collages"/>	Example: Accounts
Starts with vowel sound	<input type="checkbox"/>	

The Object Name is used when referencing the object via the API.

Object Name	<input type="text" value="collage"/>	Example: Account
-------------	--------------------------------------	------------------

Description

Context-Sensitive Help Setting

Open the standard Salesforce.com Help & Training window
 Open a window using a Visualforce page

Content Name

None

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name	<input type="text" value="Collage Name"/>	Example: Account Name
Data Type	<input type="text" value="Text"/>	<input type="button" value="▼"/>

Optional Features

- Allow Reports
- Allow Activities
- Track Field History
- Allow in Chatter Groups
- Enable Licensing ⓘ

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more.](#)

- Allow Sharing
- Allow Bulk API Access
- Allow Streaming API Access

Deployment Status

In Development Deployed

Search Status

When this setting is enabled, your users can find records of this object type when they search. [Learn more.](#)

- Allow Search

Object Creation Options (Available only when custom object is first created)

- Add Notes and Attachments related list to default page layout
- Launch New Custom Tab Wizard after saving this custom object

The screenshot shows the Salesforce Setup interface under the Object Manager tab. A message at the top indicates that permissions for the object are disabled by default. The 'Custom Object Definition Edit' page is displayed, with the 'Label' field set to 'Department' and the 'Plural Label' field set to 'Departments'. The 'Object Name' field also contains 'Department'. Other fields like 'Description' and 'Content Name' are left blank. Section headers include 'Custom Object Information', 'Optional Features', 'Object Classification', 'Deployment Status', 'Search Status', and 'Object Creation Options'. Buttons at the bottom allow saving changes.

Step 4

Now you can preview your created profile on the profile option here my profile name venkat has been created with the access of read,create,edit along with view on it

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit Del ...	venkat	Analytics Cloud Integration User	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Del ...	venkatt	Analytics Cloud Integration User	<input checked="" type="checkbox"/>

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 been created with alternate name but with the same user profile and once the two user are create click on save.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chaty_00d500000cifheavffeloywicndx@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	S_DharunKumar	Dharun	2k20i56@kiot.ac.in		<input checked="" type="checkbox"/>	Work.com Only User
<input type="checkbox"/> Edit	S_Venkatesan	VS	venkatesans@aaannmudalvan.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	S_Venkatesan	venky	2k20i43@kiot.ac.in		<input checked="" type="checkbox"/>	Work.com Only User
<input type="checkbox"/> Edit	User_Integration	integ	integration@00d500000cifheav.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightsecurity@00d500000cifheav.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

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.

The screenshot shows the Salesforce Setup interface. In the left sidebar, under 'Users', 'Permission Sets' is selected. A new permission set named 'assignment3' is being created. The 'Accounts' tab is active, displaying object permissions for various actions like Read, Create, Edit, Delete, View All, and Modify All. The 'Field Permissions' section is partially visible below. The top navigation bar includes 'Search Setup' and various icons.

The screenshot shows the 'Select Users to Assign' screen for the 'assignment3' permission set. The 'All Users' filter is applied, showing a list of users with checkboxes next to their names. The list includes Chatter Expert, DharunKumar S, Integration User, Security User, and Venkatesan S. The top navigation bar includes 'Search Setup' and various icons.

... > PERMISSION SET 'ASSIGNMENT3' > MANAGE ASSIGNMENT EXPIRATION
assignment3

Select an Expiration Option For Assigned Users

No expiration date ?

Specify the expiration date ?

Time Zone ? Select a time zone...

Full Name	Role	Profile	Active	User License	Expires On
Venkatesan S		Work.com Only User	✓	Work.com Only	Never Expires

Selected Users

Cancel **Back** **Assign**

Cancel **Back** **Assign**

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.

Q_ permi

Users

Permission Set Groups

Permission Sets

Custom Code

Custom Permissions

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

SETUP Permission Sets

assignment3

Find Settings... Clone Delete Edit Properties Manage Assignments

Video Tutorial | Help for this Page

Permission Set Overview > Object Settings Accounts

Accounts Save Cancel

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"/>

... > PERMISSION SET 'ASSIGNMENT3' > MANAGE ASSIGNMENT EXPIRATION
assignment3

Select Users to Assign

All Users

Full Name ↑	Alias	Username	Role	Acti...	Profile
Chatter Expert	Chatter	chatty.00d5j00000cirfheav.ffeiywzndx@chatter.salesforce.com	<input checked="" type="checkbox"/>	Chatter Free User	<input type="button" value="Edit"/>
DharunKumar S	Dharun	2k20it56@kiot.ac.in	<input checked="" type="checkbox"/>	Work.com Only User	<input type="button" value="Edit"/>
Integration User	integ	integration@00d5j00000cirfheav.com	<input checked="" type="checkbox"/>	Analytics Cloud Integration User	<input type="button" value="Edit"/>
Security User	sec	insightssecurity@00d5j00000cirfheav.com	<input checked="" type="checkbox"/>	Analytics Cloud Security User	<input type="button" value="Edit"/>
Venkatesan S	venky	2k20it43@kiot.ac.in	<input checked="" type="checkbox"/>	Work.com Only User	<input type="button" value="Edit"/>

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.

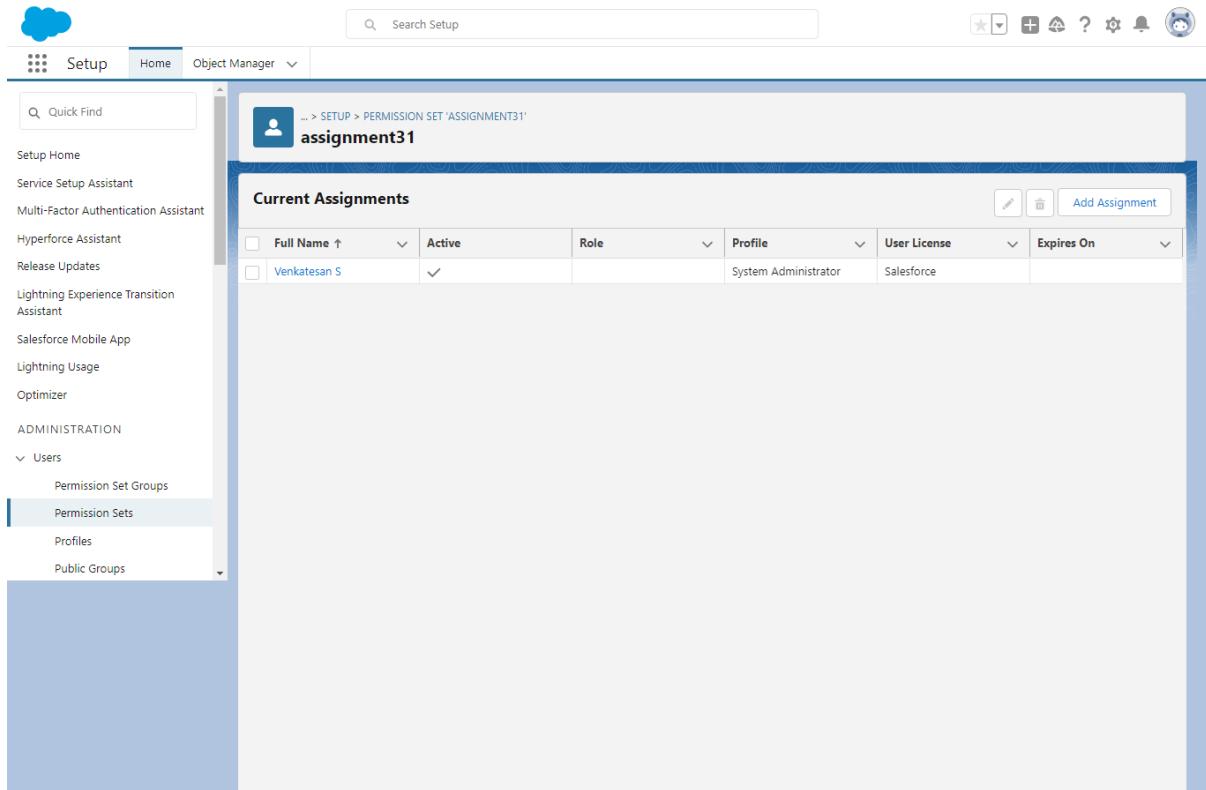
... > PERMISSION SET 'PERMISSION12' > MANAGE ASSIGNMENT EXPIRATION
permission12

Select Users to Assign

All Users

Full Name ↑	Alias	Username	Role	Active	Profile
Jagadesh S	JS	w0w@gmail.com	SF Admin	<input checked="" type="checkbox"/>	System Administrator
Jagadesh S	JS	jega1117@gmail.com	Channel Sales Team	<input type="checkbox"/>	Standard Platform User
<input checked="" type="checkbox"/> Jagadesh11 S	js	jwv123@gmail.com	Director, Channel Sales	<input checked="" type="checkbox"/>	Jaga
Jagadesh22 S	js	jaat1@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Jaga

Now click on Assign.



Now the specific access for the venkatesan s 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**.

Fields & Relationships

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Comment	Comment_c	Text Area(255)		
Created By	CreatedById	Lookup(User)		
Email	Email_c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name_c	Text(125)		
Owner	OwnerId	Lookup(User,Group)	✓	
Rating	Rating_c	Picklist		
Survey result Name	Name	Text(80)	✓	

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.

Information

- Email Template Name: Thank you Email - Survey
- Description:
- Made in Email Template Builder:
- Related Entity Type: Service Contract
- Folder: Private Email Templates

Message Content

Subject: Thank you for completing our survey !

Enhanced Letterhead:

```
Hi {{survey_results_c.Name_c}},  
Thanks for taking time out to participate in our survey, we are very appreciative of the time you have taken to assist in our analysis, and commit to utilizing the information gained to contemplate and implement
```

Additional Information

Created By: Venkatesan S, 03/10/2023, 2:25 pm

Last Modified By: Venkatesan S, 03/10/2023, 2:25 pm

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**.

The screenshot shows the Salesforce Setup interface. On the left, the navigation sidebar is open, showing various categories like Feature Settings, Chatter, Service, Process Automation, and Workflow Actions. Under Workflow Actions, 'Email Alerts' is selected and highlighted with a blue bar. The main content area displays the 'Email Alerts' page with a sub-section titled 'Email Alert - Survey - Thank You Email'. This section includes fields for Description (Survey - Thank You Email), Unique Name (Survey_Thank_You_Email), From Email Address (Current User's email address), Recipients (User_Integration_User), Additional Emails, Created By (Venkatesan_S), and Modified By (Venkatesan_S). Below this, there are three related lists: 'Rules Using This Email Alert' (empty), 'Approval Processes Using This Email Alert' (empty), and 'Entitlement Processes Using This Email Alert' (empty). At the bottom right of the main content area, there is a link 'Help for this Page'.

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__c** 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**.

Edit Create Records

Create Salesforce records using values from the flow.

*Label *API Name

Description

How Many Records to Create
 One
 Multiple

How to Set the Record Fields
 Use all values from a record
 Use separate resources, and literal values

Create a Record of This Object
*Object

Set Field Values for the Survey Result

Field	Value
Comment__c	<input type="text" value="A_a Comment"/> <input type="button" value="X"/>
Email__c	<input type="text" value="A_a Email > Value"/> <input type="button" value="X"/>
Name__c	<input type="text" value="(!Name.firstName) {!Name.lastName}"/> <input type="button" value="X"/>
Rating__c	<input type="text" value="A_a Rating"/> <input type="button" value="X"/>

[+ Add Field](#)

Manually assign variables

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**.

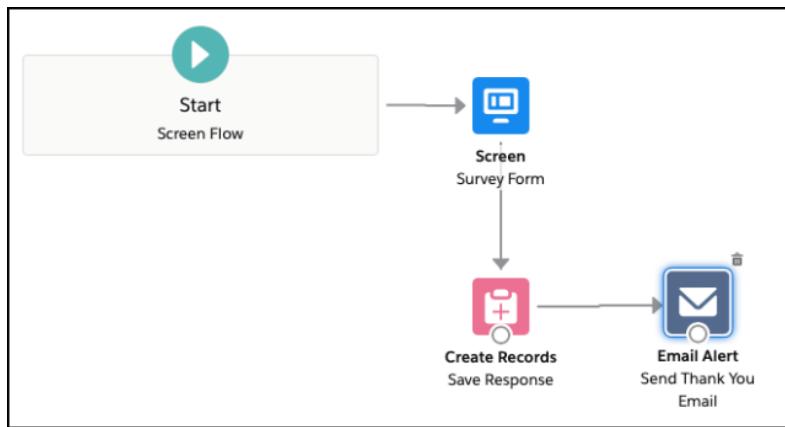
Edit "Survey - Thank You Email" email alert

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
Send Thank You Email	Send_Thank_You_Email
Description	
<pre>-----</pre>	
Set Input Values	
A_a * Record ID	{!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 * Flow API Name

Survey Survey

Description

Hide Advanced

How to Run the Flow i

User or System Context—Depends on How Flow is Launched

* Type

Screen Flow

* API Version for Running the Flow

51

Interview Label i

Insert a resource...

Survey {!\$Flow.CurrentDateTime}

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

Status:	Type:	Version Number:
Active	Screen Flow	2

Cancel **Save**

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

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

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

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

- Toolbar:** File, Edit, Debug, Test, Workspace, Help.
- Tab:** VFPageToLC.app *
- Code Editor:** Displays the following Apex code:

```
1 <aura:application access="global"
2             extends="ltng:outApp"
3             implements="ltng:allowGuestAccess">
4     <aura:dependency resource="lightning:flow"/>
5 </aura:application>
```
- Bottom Bar:** 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()` Click Setup.

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

The screenshot shows the Visualforce Page Editor for a page named "Survey". The "Page Information" section includes fields for Label ("Survey"), Name ("Survey"), and Description. It also has checkboxes for "Available for Lightning Experience, Experience Builder sites, and the mobile app" (checked) and "Require CSRF protection on GET request" (unchecked). The "Visualforce Markup" tab displays the following Apex code:

```

<apex:page showheader="false" lightningStylesheets="true">
<html>
<head>
<apex:includeLightning />
<!--Use apex:includeLightning to add the Lightning Components for Visualforce JavaScript library to your Visualforce page-->
</head>
<body class="slds-scope">
<div id="flowContainer" />
<script>
var statusChange = function (event) {
    if(event.getParam("status") === "FINISHED") {
        var outputVariables = event.getParam("outputVariables");
        var key;
        for(key in outputVariables) {
            if(outputVariables[key].name === "myOutput") {
                // Do something with myOutput
            }
        }
    }
};
$Lightning.use("c:VFPageToLC", function() {
    $Lightning.createComponent("lightning:flow", {"onstatuschange":statusChange},
    "flowContainer",
    function (component) {
        component.startFlow("Survey");
    }
));
</script>
</body>

```

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

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

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

The screenshot shows the "Site Edit" screen for a site labeled "Survey". The form includes fields for 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 status (checked), 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 (unchecked), Clickjack Protection Level ("Allow framing by the same origin only (Recommended)" checked), Require Secure Connections (HTTPS) (checked), Lightning Features for Guest Users, Upgrade all requests to HTTPS (checked), Enable Content Sniffing Protection (checked), Enable Browser Cross Site Scripting Protection (checked), Referrer URL Protection (checked), Guest Access to the Payments API (unchecked), and API.

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