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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 'New Custom Object' page in the Salesforce Setup. The 'Label' field is set to 'college' and the 'Plural Label' field is set to 'Colleges'. The 'Object Name' field is also set to 'college'. The 'Record Name' field is set to 'College Name' and the 'Data Type' is 'Text'. Under 'Optional Features', 'Allow Bulk API Access' and 'Allow Streaming API Access' are checked. Under 'Deployment Status', 'Deployed' is selected. At the bottom, there are 'Save', 'Save & New', and 'Cancel' buttons.

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

The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. A message at the top indicates that permissions for the object are disabled by default. The 'Custom Object Definition Edit' page is displayed, showing fields for 'Label' (Department), 'Plural Label' (Departments), and 'Object Name' (department). Other sections include 'Description', 'Content Name' (None), 'Record Name Label and Format' (Record Name: Department Name, Data Type: Text), 'Optional Features' (checkboxes for Reports, Activities, Field History, Chatter Groups, and Licensing), 'Object Classification' (checkboxes for Sharing, Bulk API Access, and Streaming API Access), 'Deployment Status' (Deployed), 'Search Status' (Allow Search checked), and 'Object Creation Options' (checkboxes for Notes and Attachments and New Custom Tab Wizard). At the bottom 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 Setup interface with the following details:

Setup > OBJECT MANAGER

department

Details

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

Details

Description

API Name: department_c

Custom: ✓

Singular Label: department

Plural Label: departments

Enable Reports

Track Activities

Track Field History

Deployment Status: Deployed

Help Settings

Standard salesforce.com Help Window

Edit **Delete**

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

Setup > OBJECT MANAGER

department

Details

- Fields & Relationships
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- Scoping Rules
- Triggers
- Flow Triggers
- Validation Rules

New Relationship

Step 6. Add custom related lists Step 6 of 6

Field Label: collage
Data Type: Master-Detail
Field Name: collage
Description:

Specify the title that the related list will have in all of the layouts associated with the parent.
Related List Label: departments

These are the page layouts that will include this field. Because this is a Master-Detail relationship, the field is required.

Add Related List: Page Layout Name
 collage Layout

Append related list to users' existing personal customizations

Previous **Save & New** **Save** **Cancel**

Fields & Relationships					
4 Items, Sorted by Field Label					
	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.

Setup Home Object Manager

collage

SETUP > OBJECT MANAGER

Details

Fields & Relationships

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

New Custom Field

Step 5. Add to page layouts Step 5 of 5

Field Label: total count
Data Type: Roll-Up Summary
Field Name: total_count
Description:

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Field Page Layout Name
 collage Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Previous Save & New Save Cancel

Setup Home Object Manager

collage

SETUP > OBJECT MANAGER

Fields & Relationships

5 Items, Sorted by Field Label

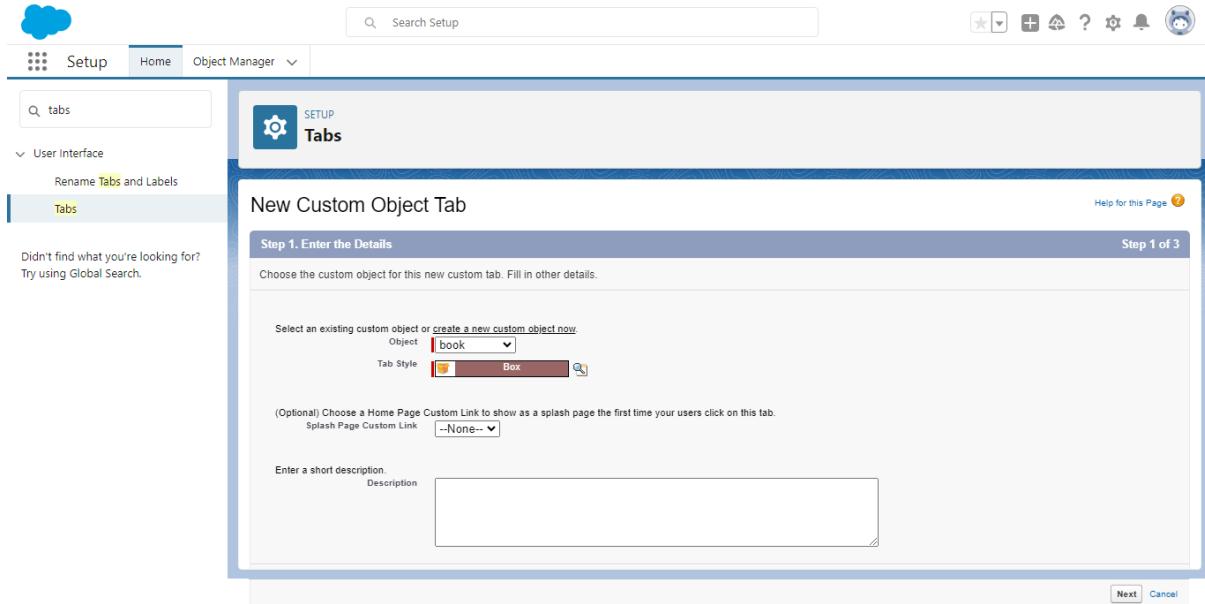
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
collage Name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
total count	total_count_c	Roll-Up Summary (COUNT department)		

Quick Find New Deleted Fields Field Dependencies Set History Tracking

Details

Fields & Relationships

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



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"/>

Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

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

Web Tabs

No Web Tabs have been defined.

Visualforce Tabs

No Visualforce Tabs have been defined.

Lightning Component Tabs

No Lightning component tabs have been defined.

Lightning Page Tabs

No Lightning Page Tabs 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.

New college

Information

* = Required Information

college Name	kiot
phone	9087116402
Email	kiot@ac.in
Location	Latitude 90 Longitude 80

Owner
krishna s

New Import Change Owner

Cancel Save & New Save

Recently Viewed

1 item • Updated a few seconds ago

Department Name
cse

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.

Profiles

Action	Profile Name	User License	Custom
<input type="checkbox"/>	venkat	Analytics Cloud Integration User	✓
<input type="checkbox"/>	venkatt	Analytics Cloud Integration User	✓

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

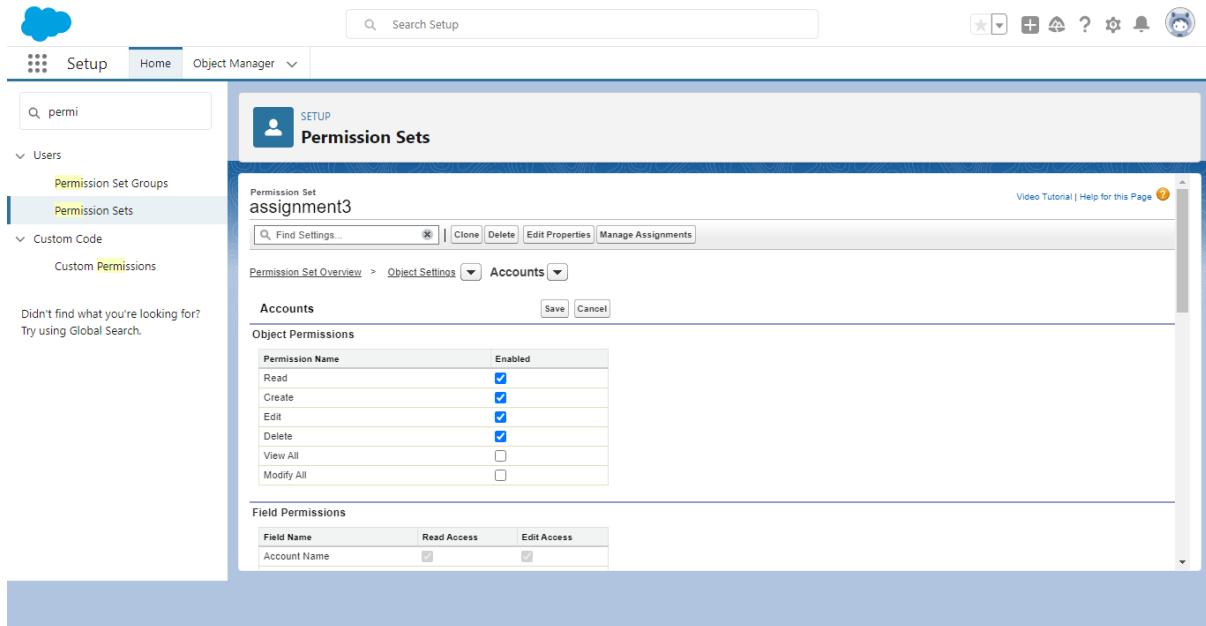
Change Password

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 Setup interface with the 'Permission Sets' page open. The left sidebar is collapsed, showing sections like 'User Management Settings', 'Feature Settings', 'Prospector Users', 'Service', 'Embedded Service', and 'User Interface'. The main content area has a header 'Permission Sets' with a search bar and a help link. Below the header is a table titled 'All Permission Sets' with columns for 'Action', 'Permission Set Label', 'Description', and 'License'. The table lists various permission sets such as 'Buyer', 'CRM User', 'Commerce Admin', etc., with their descriptions and corresponding licenses. A specific row for 'Access supervisor features in Service Cloud Voice contact centers th...' is highlighted. At the bottom of the table are navigation links for 'Previous' and 'Next' pages, and a page number indicator 'Page | 1 | of 2 |'.

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

SETUP Permission Sets Create

Enter permission set information

Label:

API Name:

Description:

Session Activation Required:

Select the type of users who will use this permission set

Who will use this permission set?

- 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.
- Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.

Not sure what a permission set license is? [Learn more here.](#)

License:

Save Cancel

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Setup Home Object Manager

user

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User Interface

Action Link Templates

Actions & Recommendations

App Menu

SETUP Permission Sets Create

Enter permission set information

Label: salesmanager

API Name: salesmanager

Description:

Session Activation Required:

Select the type of users who will use this permission set

Who will use this permission set?

- 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.
- Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.

Not sure what a permission set license is? [Learn more here.](#)

License:

Save Cancel

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

SETUP Permission Sets salesmanager

Permission Set Overview

Description:

License:

Session Activation Required:

Last Modified By: Gopal S. 01/10/2023, 7:29 pm

API Name: salesmanager

Namespace Prefix:

Created By: Gopal S. 01/10/2023, 7:29 pm

Video Tutorial | Help for this Page

Apps

Assigned Apps

Assigned Connected Apps

Object Settings

App Permissions

Apex Class Access

Visualforce Page Access

External Data Source Access

Flow Access

Learn More

Salesforce Developer Session | 128 Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce: Version 44.0 | 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 44.0 | 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 'Bank' tab is active, showing 'Tab Settings' where 'Available' is listed with 'Visible' checked. Below this is the 'Object Permissions' section, which lists permissions for 'Read', 'Create', 'Edit', 'Delete', 'View All', and 'Modify All'. Under 'Field Permissions', there is a table for the 'Bank' object with columns for Field Name, Read Access, and Edit Access. The 'Bank Name' field has both Read and Edit access checked, while 'Created By' and 'Last Modified By' have only Read access checked.

Salesforce Developer Session | 128 Top Hits 2023 | Permission Sets | Salesforce | Welcome to Salesforce: | 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"/>

Video Tutorial | Help for this Page

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

salesmanager

... > SETUP > PERMISSION SET 'SALESMANAGER'

Current Assignments

No assignments defined.



Add Assignment

Setup Home Object Manager

Select Users to Assign

All Users

Full Name	Role	Profile
Amelia Ellington	Force.com - App Subscription User	
Chatter Expert	Chatter Free User	
Diya Adanna	UMS User	
GOPAL S	System Administrator	
Integration User	Analytics Cloud Integration User	
madhu b	salesmanage	
Security User	Analytics Cloud Security User	
sowmya bala	Manager	

Cancel Next

Setup Home Object Manager

Select an Expiration Option For Assigned Users

No expiration date

Specify the expiration date

Time Zone

Selected Users

Full Name	Role	Profile	Active	User License	Expires On
madhu b	salesmanage			Salesforce Platform	Never Expires

Cancel Back Assign

The screenshot displays two overlapping Salesforce windows. The top window is titled 'Assignment Summary' and shows a table with one row of data:

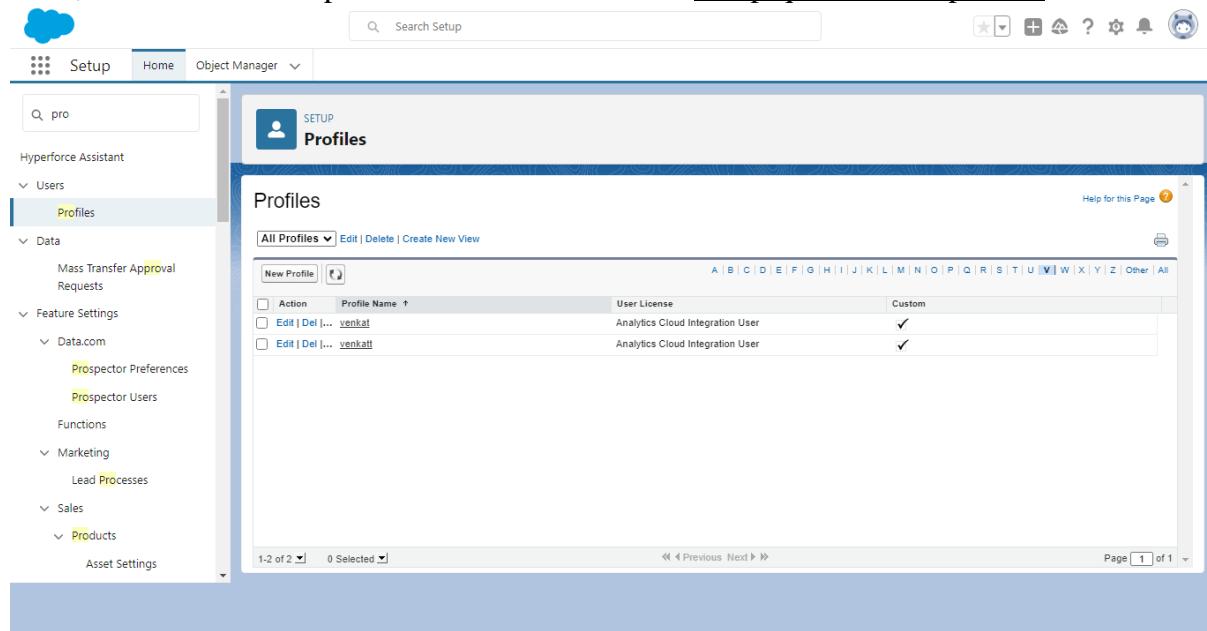
Full Name	User License	Expires On	Time Zone	Status
madhu b	Salesforce Platform			<input checked="" type="checkbox"/> Success

A green banner at the top of this window indicates '1 assignments were successful.' The bottom window shows a 'Recently Viewed' list for the 'customers' object. The list is currently empty, displaying the message: 'You haven't viewed any customers recently. Try switching list views.' A context menu is open on the right side of the list, titled 'LIST VIEW CONTROLS', with options including 'New', 'Clone', 'Rename', 'Sharing Settings', 'Show List Filters', 'Select Fields to Display', and 'Delete'. The URL in the browser bar is https://artificialintelligence-d-dev-ed.lightning.force.com/lightning/o/customer__c/list?filterName=Recent.

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 'Profiles' page selected. The left sidebar includes sections like 'Hyperforce Assistant', 'Users', 'Data', 'Feature Settings', 'Data.com', 'Marketing', 'Sales', and 'Products'. The main content area displays a table titled 'Profiles' with columns for 'Action', 'Profile Name', 'User License', and 'Custom'. Two profiles are listed: 'venkat' (Analytics Cloud Integration User) and 'venkatt' (Analytics Cloud Integration User). Both profiles have the 'Custom' checkbox checked. Navigation buttons at the bottom include '1-2 of 2', '0 Selected', 'Previous', 'Next', and 'Page 1 of 1'.

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

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

[What is this?](#)

- 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 with the following details:

- Header:** Search bar with "Search Setup", a gear icon, and various status indicators.
- Breadcrumbs:** Setup → Home → Object Manager
- Title:** Object Manager
- Section:** New Custom Object
- Message Bar:** "Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles." with "Tell me more" and "Don't show this message again" links.
- Form Fields (Custom Object Definition Edit):**
 - Custom Object Information:**
 - Label: Department
 - Plural Label: Departments
 - Example: Account
 - Starts with vowel sound:
 - Description:** A large text area for entering a description.
 - Context-Sensitive Help Setting:**
 - Open the standard Salesforce.com Help & Training window
 - Open a window using a Visualforce page
 - Content Name:** None
- Section:** Enter Record Name Label and Format
- Record Name:** Department Name (Example: Account Name)
- Data Type:** Text
- Optional Features:**
 - Allow Reports
 - Allow Activities
 - Track Field History
 - Allow in Chatter Groups
 - Enable Licensing [\(i\)](#)
- 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

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
Edit Del	venkat	Analytics Cloud Integration User	✓
Edit Del	venkatt	Analytics Cloud Integration User	✓

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
Edit	Chatter Expert	Chatter	chatty.00d5j000000cirfheavffeioywicndz@chatter.salesforce.com		✓	Chatter Free User
Edit	S_DharunKumar	Dharun	2k20156@kiot.ac.in		✓	Work.com Only User
Edit	S_Venkatesan	VS	venkatesans@aaannmudalvan.com		✓	System Administrator
Edit	S_Venkatesan	venky	2k20143@kiot.ac.in		✓	Work.com Only User
Edit	User_Integration	integ	integration@00d5j000000cirfheav.com		✓	Analytics Cloud Integration User
Edit	User_Security	sec	insightssecurity@00d5j000000cirfheav.com		✓	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 'Permission Sets' page in the Salesforce Setup. A new permission set is being created with the label 'assignment3'. The 'Object Permissions' section is open, showing permissions for the 'Accounts' object. The 'Enabled' column has checkboxes for Read, Create, Edit, Delete, and View All checked, while View All and Modify All are unchecked. The 'Field Permissions' section is also visible.

The screenshot shows the 'Select Users to Assign' screen for the 'assignment3' permission set. The 'All Users' list is displayed, showing five users: Chatter Expert (Chatter), DharunKumar S (Dharun), Integration User (integ), Security User (sec), and Venkatesan S (venky). Each user has a checkbox in the 'Role' column checked. The 'Profile' column shows the profiles for each user: Chatter Free User, Work.com Only User, Analytics Cloud Integration User, Analytics Cloud Security User, and Work.com Only User respectively.

Step 7:

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

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

Select Users to Assign

All Users

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

Cancel Next

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

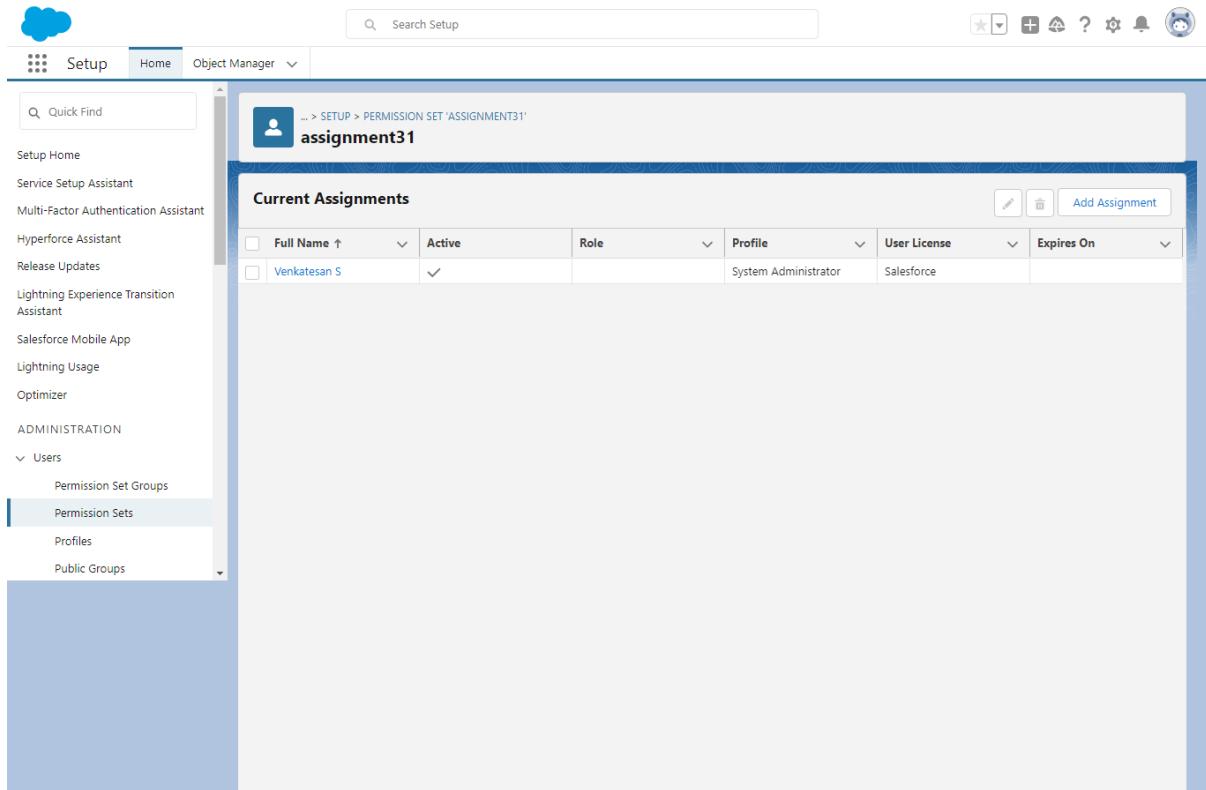
Select Users to Assign

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	jaga1117@gmail.com	Channel Sales Team	<input type="checkbox"/>	Standard Platform User
<input checked="" type="checkbox"/> Jagadesh11 S	js	jww123@gmail.com	Director, Channel Sales	<input checked="" type="checkbox"/>	Jaga
Jagadesh22 S	js	jaat1@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Jaga

Cancel Next

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.

Details

Email Template Name: Thank you Email - Survey

Description:

Made in Email Template Builder:

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**.

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																
Save Response	Save_Response																
Description																	
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 Survey Result																	
Set Field Values for the Survey Result <table border="1"> <tr> <td>Field</td> <td>Value</td> </tr> <tr> <td>Comment__c</td> <td>← Aa Comment X</td> </tr> <tr> <td>Field</td> <td>Value</td> </tr> <tr> <td>Email__c</td> <td>← Aa Email > Value X</td> </tr> <tr> <td>Field</td> <td>Value</td> </tr> <tr> <td>Name__c</td> <td>← {!Name.firstName} {!Name.lastName}</td> </tr> <tr> <td>Field</td> <td>Value</td> </tr> <tr> <td>Rating__c</td> <td>← Aa Rating X</td> </tr> </table> <p>+ Add Field</p> <p><input type="checkbox"/> Manually assign variables</p>		Field	Value	Comment__c	← Aa Comment X	Field	Value	Email__c	← Aa Email > Value X	Field	Value	Name__c	← {!Name.firstName} {!Name.lastName}	Field	Value	Rating__c	← Aa Rating X
Field	Value																
Comment__c	← Aa Comment X																
Field	Value																
Email__c	← Aa Email > Value X																
Field	Value																
Name__c	← {!Name.firstName} {!Name.lastName}																
Field	Value																
Rating__c	← Aa Rating X																
Cancel Done																	

Step 4.3: Salesforce Flow — Call an Acton — 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**.

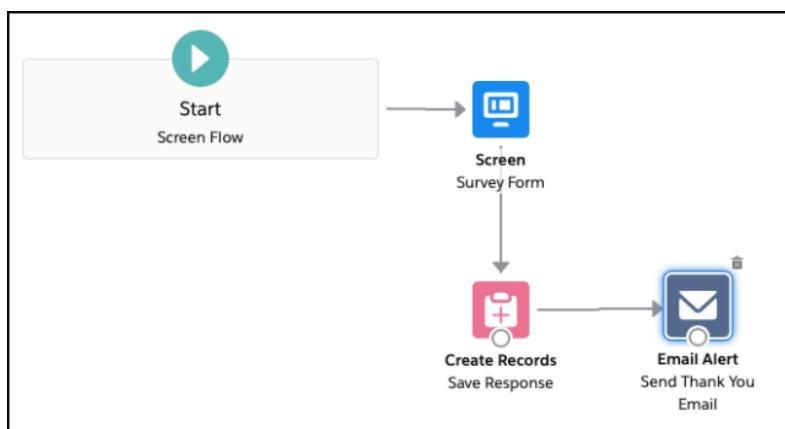
Edit "Survey - Thank You Email" email alert

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 Survey * Flow API Name Survey

Description

Hide Advanced

How to Run the Flow ①

User or System Context—Depends on How Flow is Launched

* Type Screen Flow

* API Version for Running the Flow 51

Interview Label ①

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

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

Status: Active Type: Screen Flow Version Number: 2

Cancel Save

The screenshot shows the 'Save as' dialog in the Salesforce Flow Builder. It includes fields for 'Flow Label' (Survey), 'Flow API Name' (Survey), 'Description', and 'How to Run the Flow' (User or System Context). Configuration options like 'Type' (Screen Flow) and 'API Version for Running the Flow' (51) are also present. The 'Interview Label' field contains a dynamic value. Status is set to 'Active', Type is 'Screen Flow', and Version Number is 2. At the bottom, there are 'Cancel' and 'Save' buttons.

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:** VFPPageToLC.app *
- Code Editor Content:**

```
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**.

```

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

```

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

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

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

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