

Naan Mudhalvan
Salesforce Developer(Course)
Assignment Number 1

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Year & Dep : 4th year & CSE
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.

Setup Home Object Manager

New Custom Object

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing system profiles. [Get up to speed](#) [Don't show this message again](#)

Custom Object Definition Edit

Save Save & New Cancel

Custom Object Information

2 Required Information

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

Label Example: Account

Plural Label Example: Accounts

Labels with apostrophes ☐

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

Object Name Example: Account

Description

Custom Business Rule Settings ☒ Open the standard Salesforce.com help & Training window ☐ Open a link to a page in Visualforce page

Custom Name [Add...](#)

Enter Record Name Label and Format

The Record Name appears in page layouts, list views, search results, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Name". Note that the Record Name field is always "Case Name" when referenced via the API.

Record Name Example: Account Name

Name Type

Optional Features

☐ Allow Reports
☐ Allow Activities
☐ Track Field History
☐ Allow in Chatter Groups
☐ Enable Learning

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 created list to default page layout
☐ Launch New Custom Tab Wizard after saving this custom object

Save Save & New Cancel

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

New Custom Object

Permissions for this object are default for all profiles by default. You can enable object permissions in permission sets or by editing system profiles. [Set up object permissions](#) [Learn about the permission sets](#)

Custom Object Definition Edit [Save](#) [Save & New](#) [Cancel](#)

Custom Object Information [Required Information](#)

The singular and plural labels are used in lists, page headers, and reports.

Label: Example: Account

Plural Label: Example: Accounts

Fields with word plural: ☐

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

Object Name: Example: Account

Description:

Custom Object Field Settings: ☒ Open the standard Salesforce user help & training window ☐ Open a link to a Salesforce page

Custom Name:

Enter Record Name Label and Format

The Record Name appears in page headers, lists, reports, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Name". Note that the Record Name field is always "Case Name" when referenced via the API.

Record Name: Example: Account Name

Data Type:

Optional Features

☐ Allow Reports

☐ Allow Actions

☐ Track Field History

☐ Allow in Chatter Groups

☐ Enable Learning

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

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Deployment Status [What is this?](#)

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☐ Add Notes and Attachments created list to default page layout

☐ Launch New Custom Tab Wizard after saving this custom object

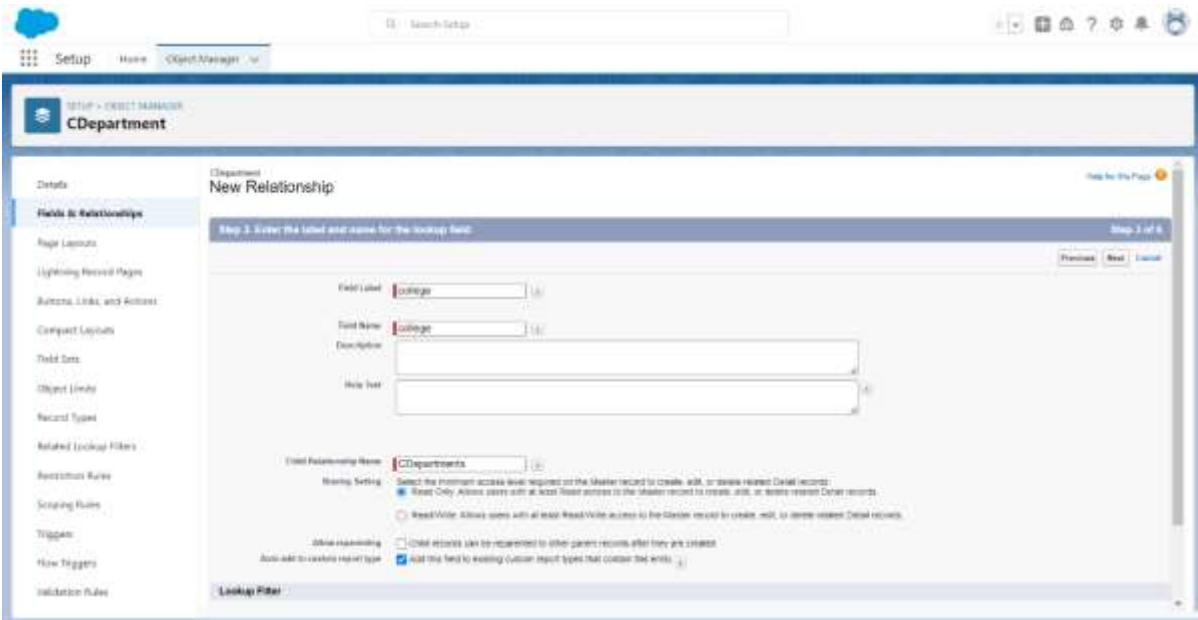
[Save](#) [Save & New](#) [Cancel](#)

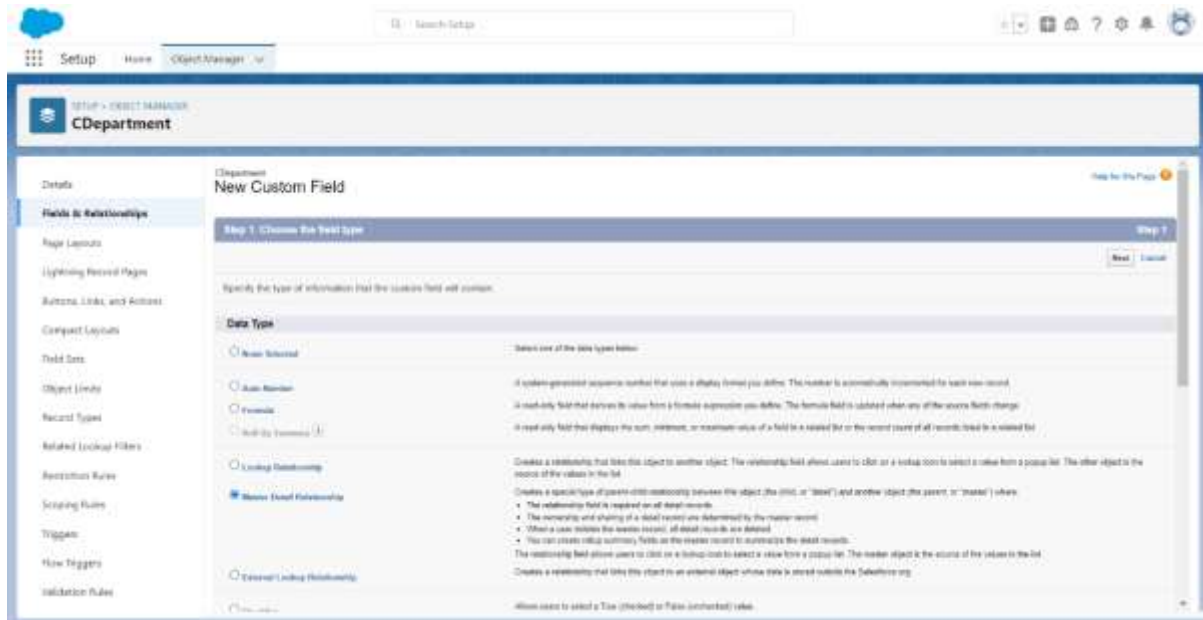
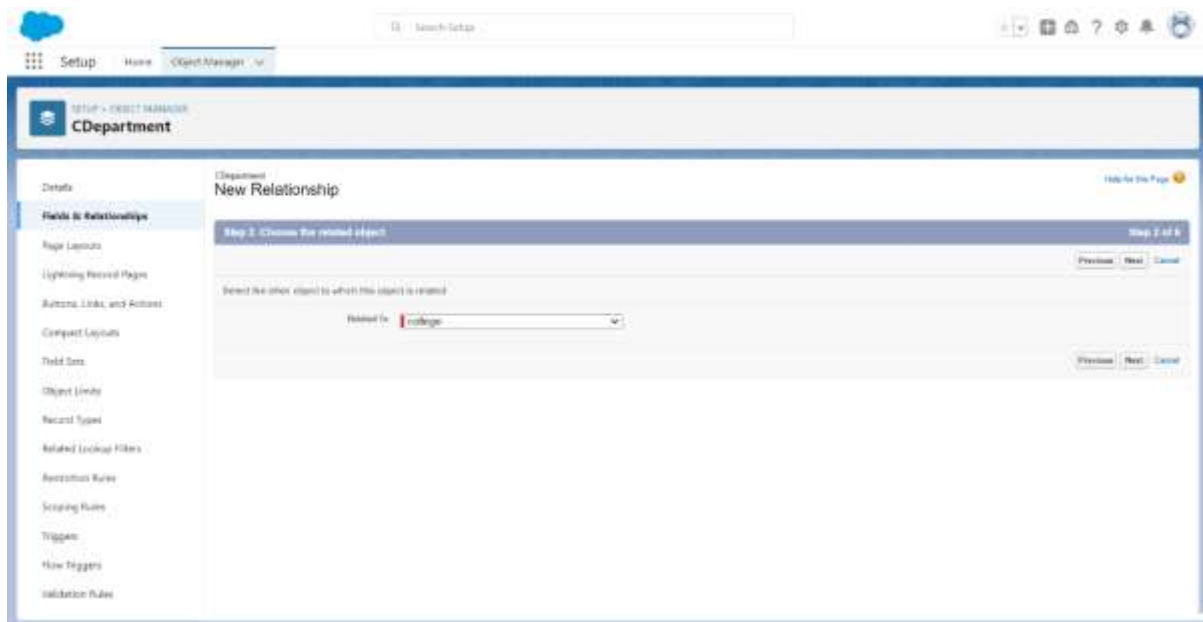
Step 2: Create a Master-Detail Relationship

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.



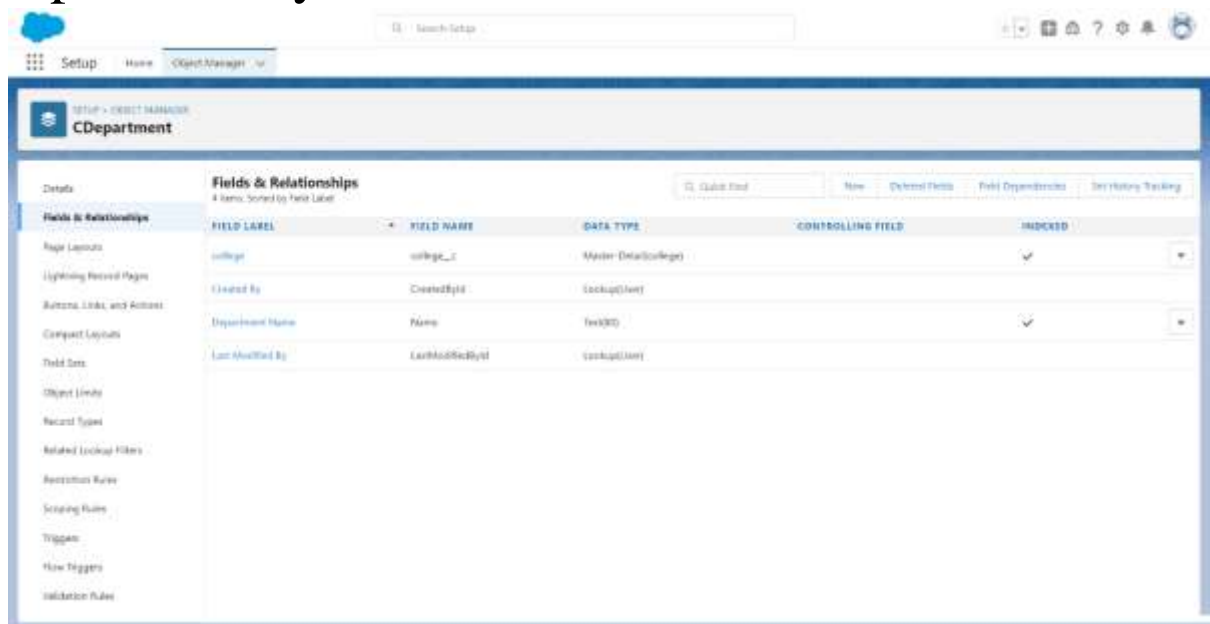


Step 3: Create the Roll-Up Summary Field

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 > OBJECT MANAGER

college

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Links

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

college

New Custom Field

Help for this Page

Step 4: Establish field-level security

Step 4 of 6

Previous Next Cancel

Field Label	Field Type	Field Name	Description	Field-Level Security for Profile	Visible	Read Only
Analyst's Cloud Integration User	Text	Analyst's Cloud Integration User		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Analyst's Cloud Security User	Text	Analyst's Cloud Security User		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cloud Kiosk Admin	Text	Cloud Kiosk Admin		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contract Manager	Text	Contract Manager		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cloud Ops Data Proxy User	Text	Cloud Ops Data Proxy User		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom Marketing Profile	Text	Custom Marketing Profile		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom Sales Profile	Text	Custom Sales Profile		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom Support Profile	Text	Custom Support Profile		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contractor	Text	Contractor		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Travel User - And Subcontractor User	Text	Travel User - And Subcontractor User		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Setup > OBJECT MANAGER

college

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Links

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

college

New Custom Field

Help for this Page

Step 3: Define the summary calculation

Step 3 of 6

Previous Next Cancel

Select Object to Summarize

Master Object

college

Summation Object

CDepartments

Select Roll-Up Type

COUNT

MIN

MAX

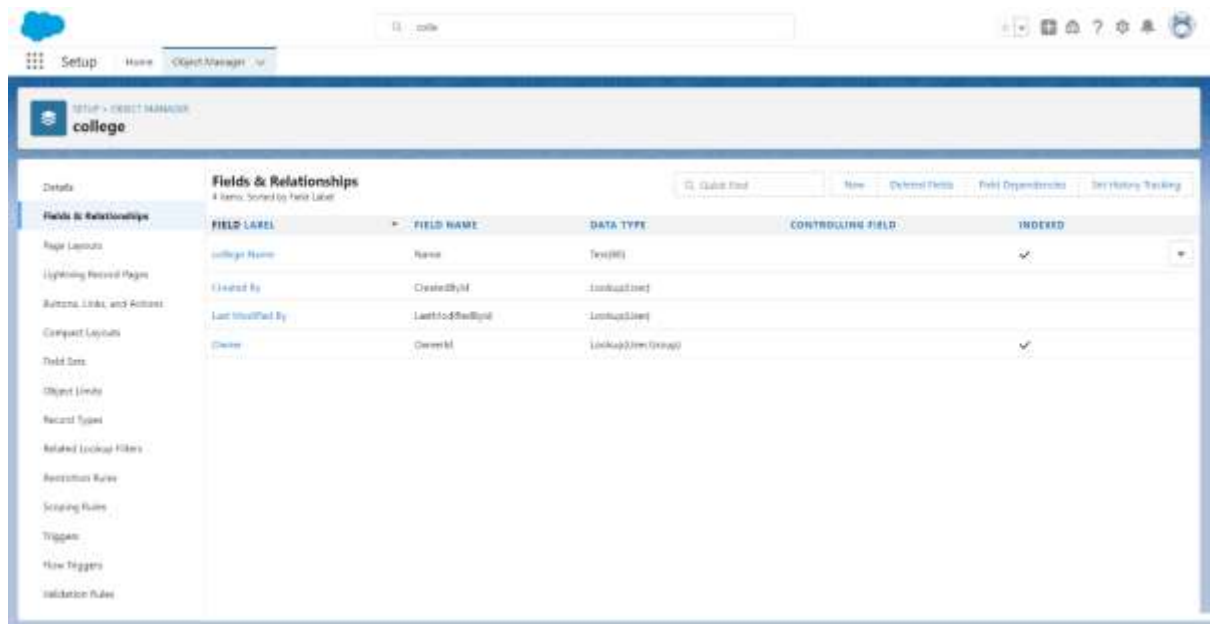
Roll-Up Aggregates

Filter Criteria

All records should be included in the calculation

Only records meeting search criteria should be included in the calculation

Previous Next Cancel



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.

The screenshot shows the Salesforce Setup interface for configuring a new custom object tab. The left sidebar contains navigation links for 'Setup', 'Home', and 'Object Manager'. The main content area is titled 'New Custom Object Tab' and includes a 'Step 2. Add to Profiles' section. Below this, there is a table with two columns: 'Profile' and 'Tab visibility'. The table lists various profiles and their corresponding tab visibility settings, which are all set to 'Default On'. The table is scrollable, and the bottom of the page shows 'Previous', 'Next', and 'Cancel' buttons.

Profile	Tab visibility
Analytics Cloud Integration User	Default On
Analytics Cloud Security User	Default On
Authenticated Website	Default On
Authenticated Website	Default On
Cloud Kiosk Admin	Default On
Contract Manager	Default On
Custom Org Data Proxy User	Default On
Customer Marketing Profile	Default On
Customer Sales Profile	Default On
Customer Support Profile	Default On
Customer	Default On
Customer Community Login User	Default On
Customer Community Plus Login User	Default On
Customer Community Plus User	Default On
Customer Community User	Default On
Customer Profile Manager Custom	Default On
Customer Profile Manager Standard	Default On
External App Login User	Default On
External Identity User	Default On
Force.com - App Integration User	Default On
Force.com - File User	Default On
Guest Partner User	Default On
High Volume Customer Portal	Default On
High Volume Customer Portal User	Default On
Identity User	Default On
Manager	Default On
Marketing User	Default On
Minimum Access - Salesforce	Default On
Partner App Subscription User	Default On
Partner Community Login User	Default On
Partner Community User	Default On
Read-Only	Default On
Research Manager	Default On
Research User	Default On
Salesforce API Call System Integrations	Default On
Sales User	Default On
Security Profile	Default On
Senior Partner User	Default On
Subscriber Manager	Default On
Standard Platform User	Default On
Standard User	Default On
System Administrator	Default On

Setup

Home

Object Manager

User Interface

Rename Tabs and Labels

Tabs

Didn't find what you're looking for?

Try using Global Search.

Setup

Tabs

New Custom Object Tab

Help to this Page

Step 1: Enter the Details

Step 1 of 3

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

Select an existing custom object or [Create a New Custom Object](#).

Object: College

Tab Type: Standard

(Optional) Choose a Home Page Custom Link to show on a splash page the first time your users click on this tab.
 Splash Page Custom Link: None

Enter a short description:
 Description:

[Next](#) [Cancel](#)

Setup

Home

Object Manager

User Interface

Rename Tabs and Labels

Tabs

Didn't find what you're looking for?

Try using Global Search.

Setup

Tabs

Add to Custom App

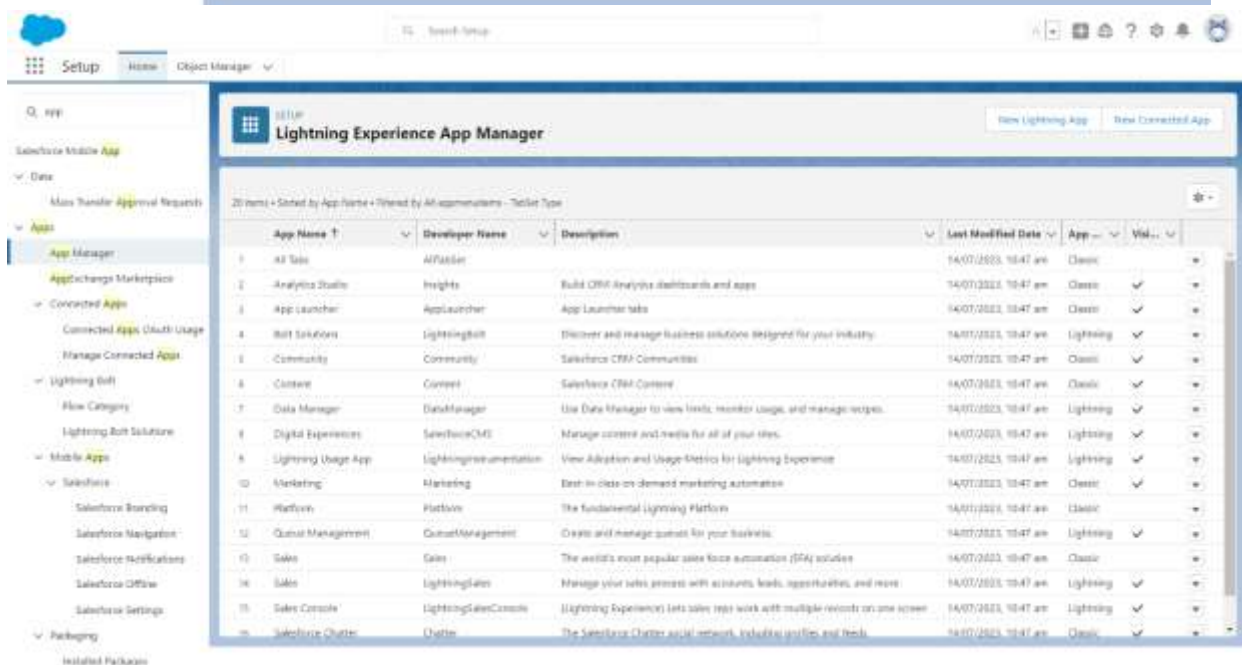
Step 3 of 3

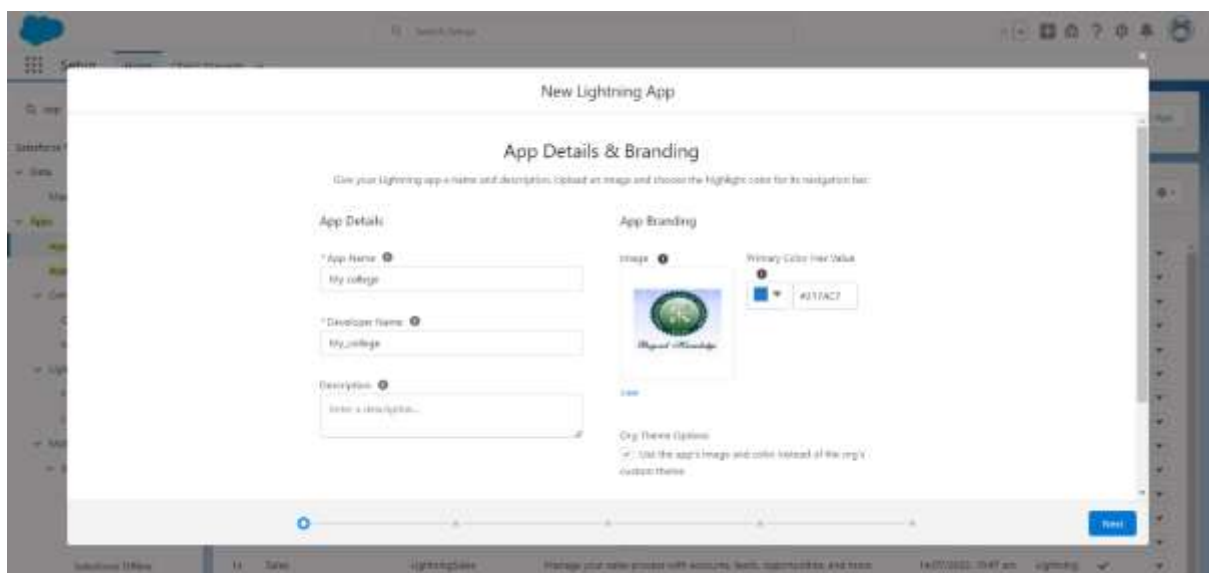
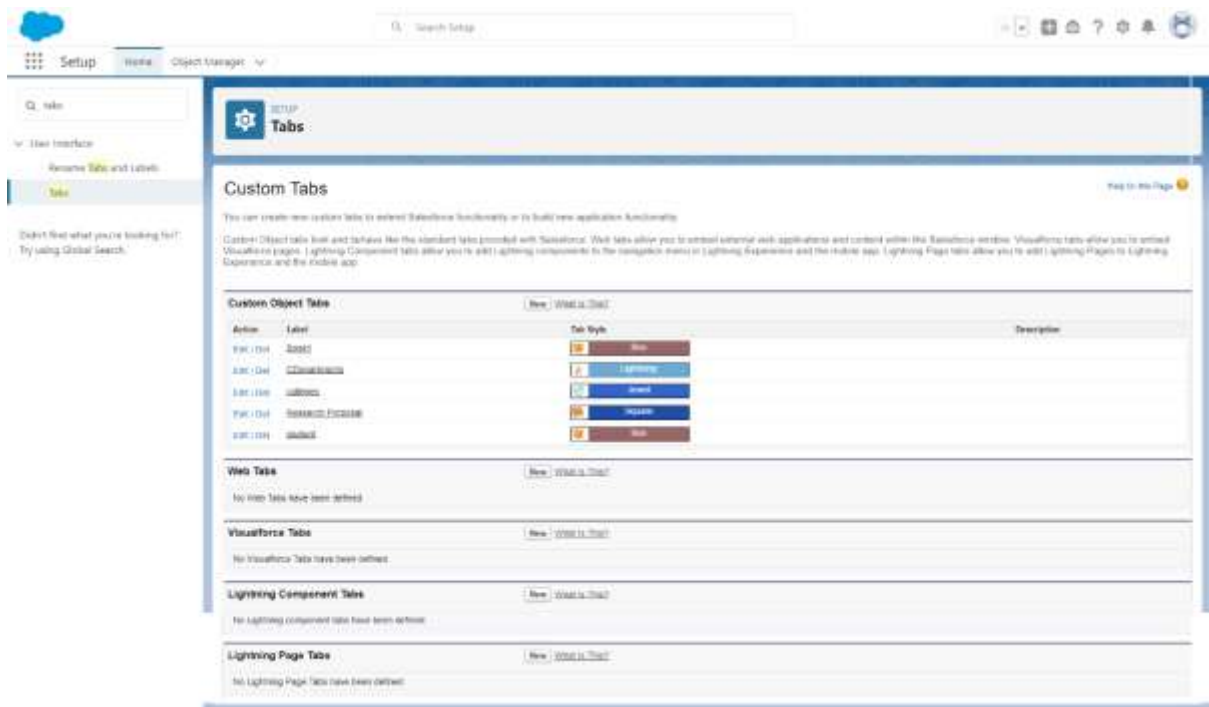
Choose the custom apps for which the new custom tab will be available. You may also wish to give the visibility of tabs from the detail and edit pages of each Custom App.

Custom App	Include Tab
Platform (standard__Platform)	<input checked="" type="checkbox"/>
Sales (standard__Sales)	<input checked="" type="checkbox"/>
Service (standard__Service)	<input checked="" type="checkbox"/>
Marketing (standard__Marketing)	<input checked="" type="checkbox"/>
Sample Console (standard__RefreshConsole)	<input checked="" type="checkbox"/>
High Income Customer Portal (set)	<input checked="" type="checkbox"/>
Authenticated Website User	<input checked="" type="checkbox"/>
App Launcher (standard__AppLauncher)	<input checked="" type="checkbox"/>
Comments (standard__Community)	<input checked="" type="checkbox"/>
Site.com (standard__Site)	<input checked="" type="checkbox"/>
Salesforce Chatter (standard__Chatter)	<input checked="" type="checkbox"/>
Content (standard__Content)	<input checked="" type="checkbox"/>
Adaption Studio (standard__Adaptation)	<input checked="" type="checkbox"/>
Sales Console (standard__LightningSalesConsole)	<input checked="" type="checkbox"/>
Service Console (standard__LightningService)	<input checked="" type="checkbox"/>
Sales (standard__LightningSales)	<input checked="" type="checkbox"/>
Lightning Usage App (standard__LightningUsageApp)	<input checked="" type="checkbox"/>
Digital Experiences (standard__SalesforceOIG)	<input checked="" type="checkbox"/>
Queue Management (standard__QueueManagement)	<input checked="" type="checkbox"/>
Data Manager (standard__DataManager)	<input checked="" type="checkbox"/>
Bot Builders (standard__LightningBot)	<input checked="" type="checkbox"/>
Salesforce Scheduler Setup (standard__LightningScheduler)	<input checked="" type="checkbox"/>

☒ [Add tab to select existing personal customizations](#)

[Previous](#) [Save](#) [Cancel](#)

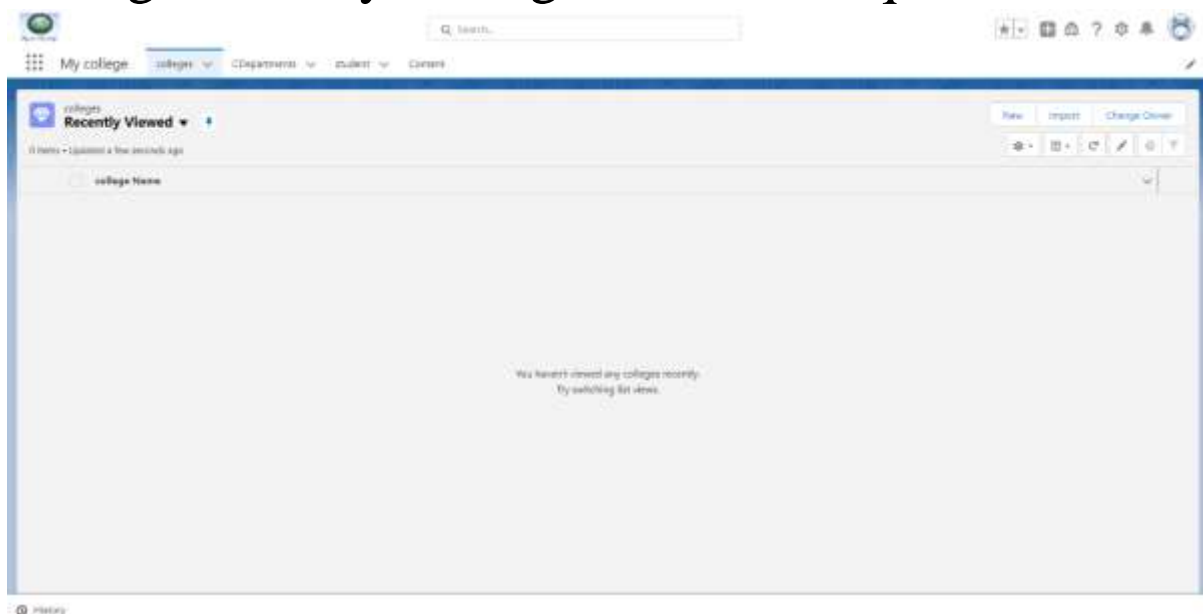




Conclusion:

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.



app-d-dev-ed.develop.lightning.force.com/lightning/ui/CDepartment_?view=tour&...<div>My college</div><div>Recently Viewed</div><div>Department Name</div><div>New CDepartment</div><div>Information</div><div>Department Name</div><div>information technology</div><div>College</div><div>East</div><div>email</div><div>it@signal.com</div><div>phone</div><div>9077777500</div><div>full name</div><div>John</div><div>description</div><div></div><div>Cancel Save & View Save</div></div>

My college

colleges

Departments

student

Content

Search

Home

Help

Settings

Logout

Information technology

New Contact

HR

New Opportunity

Related

Details

Department Name

information technology

College

klot

Email

klot@gmail.com

Phone

887577200

Last name

klot

First name

klot

Created By

klot@gmail.com 01/10/2023 11:18 am

Last Modified By

klot@gmail.com 01/10/2023 11:19 am

History

My college

colleges

Departments

student

Content

Search

Home

Help

Settings

Logout

klot

New Contact

HR

New Opportunity

Related

Details

College Name

klot

Total count

1

Phone

887577200

Email

klot@gmail.com

Location

klot

Created By

klot@gmail.com 01/10/2023 11:18 am

Last Modified By

klot@gmail.com 01/10/2023 11:17 am

History

My college

colleges

Departments

student

Content

Search

Home

Help

Settings

Logout

Recently Viewed

New

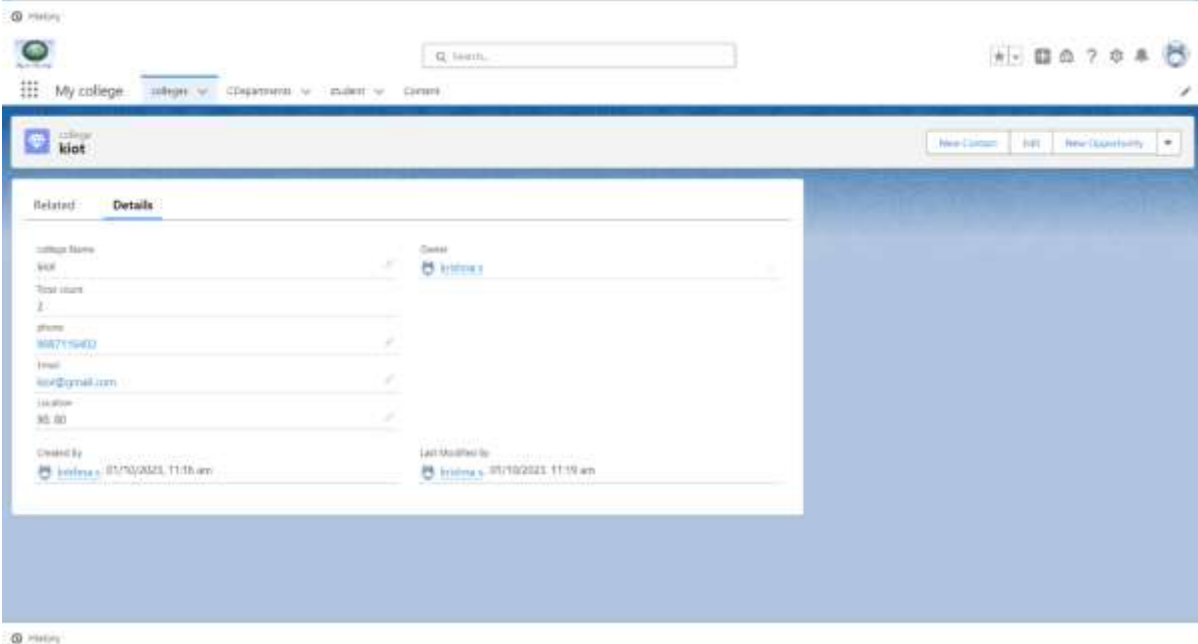
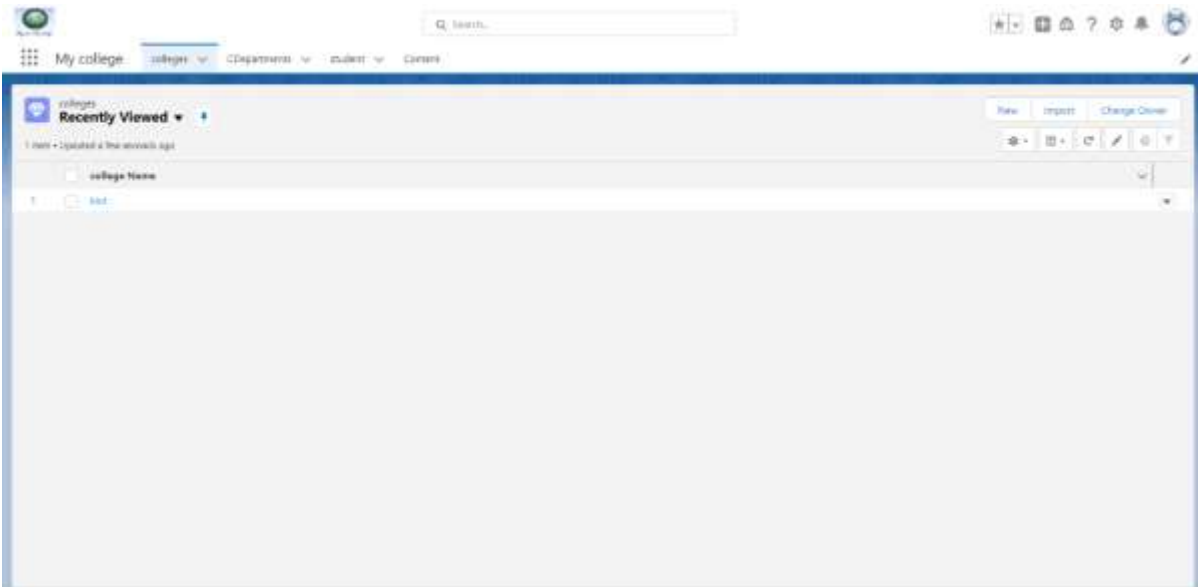
Import

1 item • Updated 4 the seconds ago

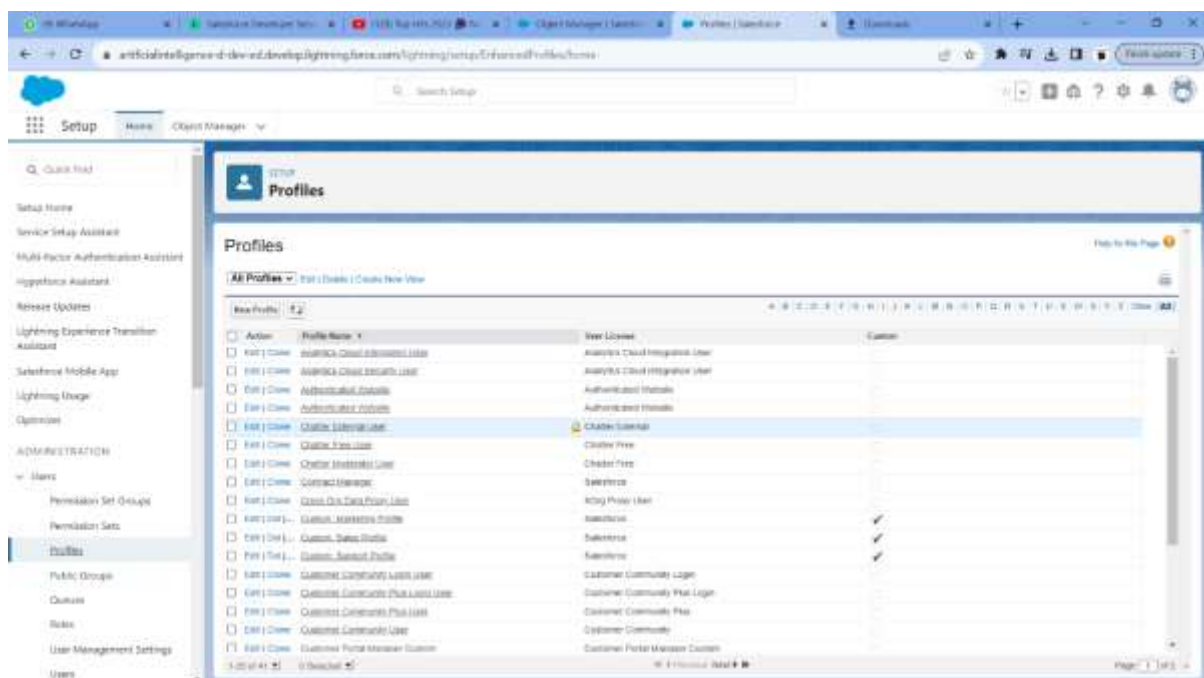
Department Name

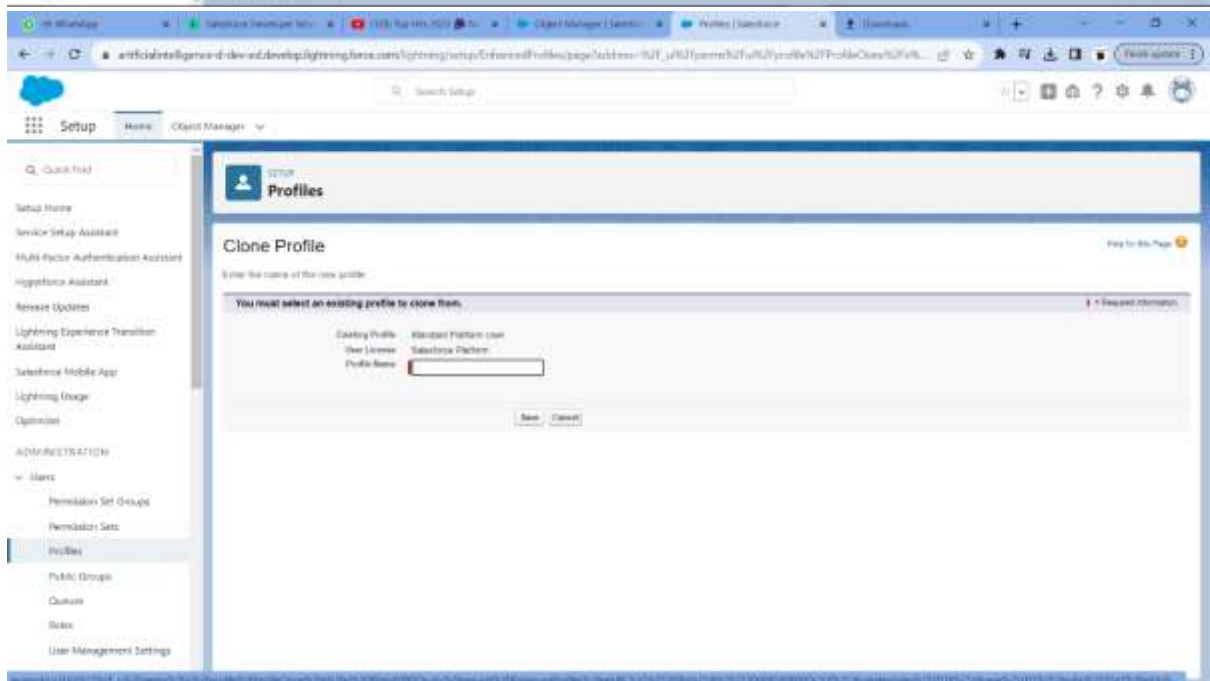
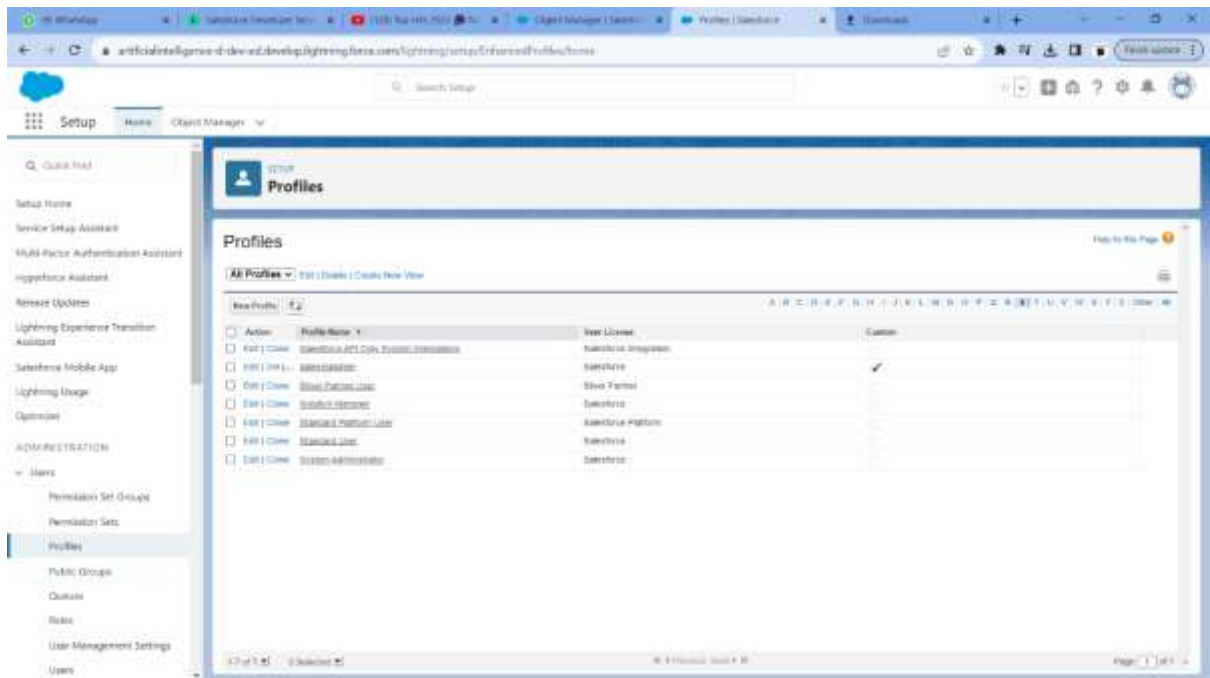
1

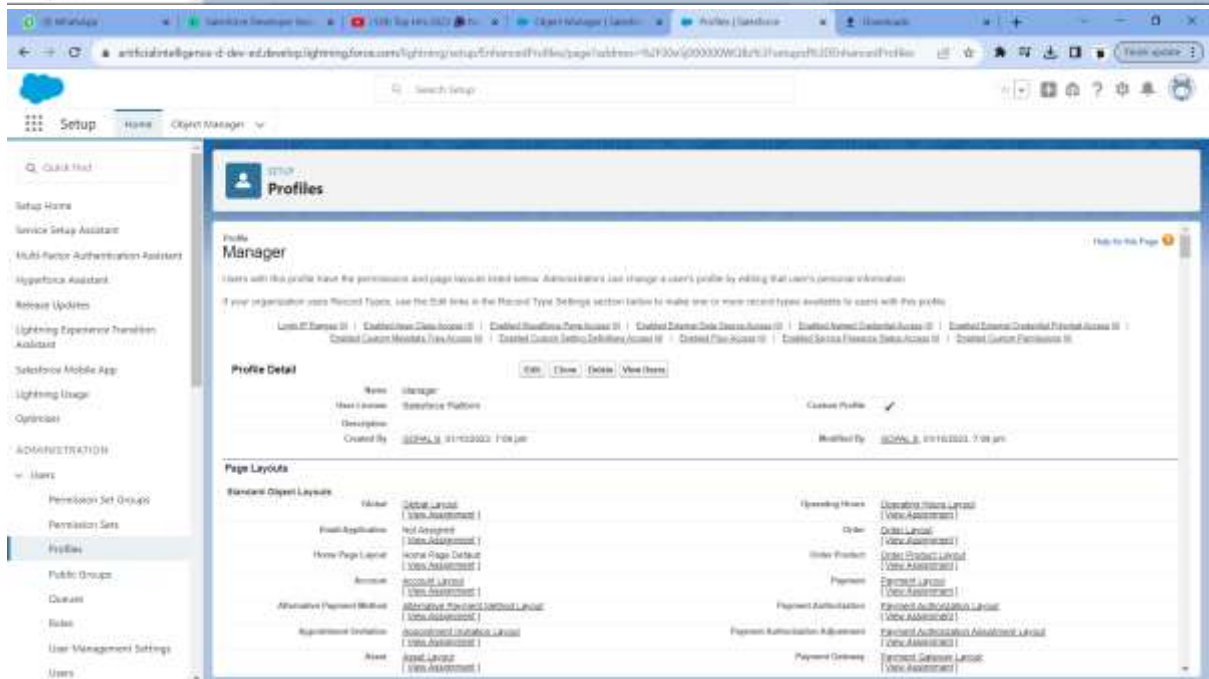
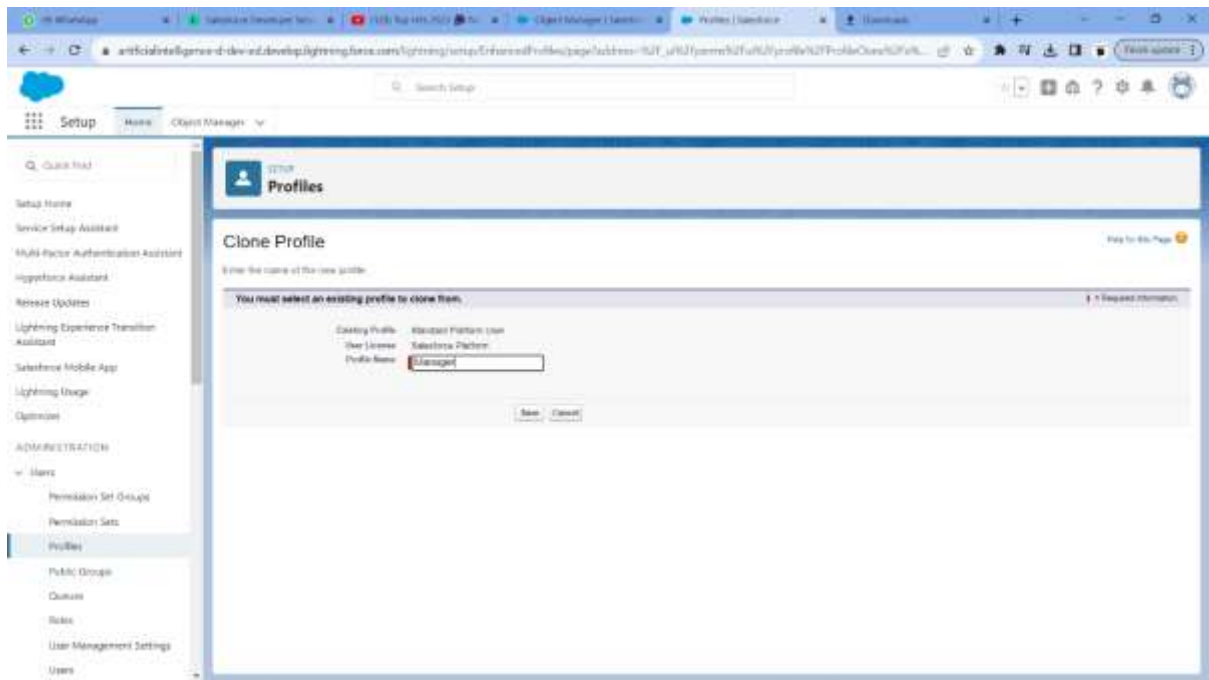
klot

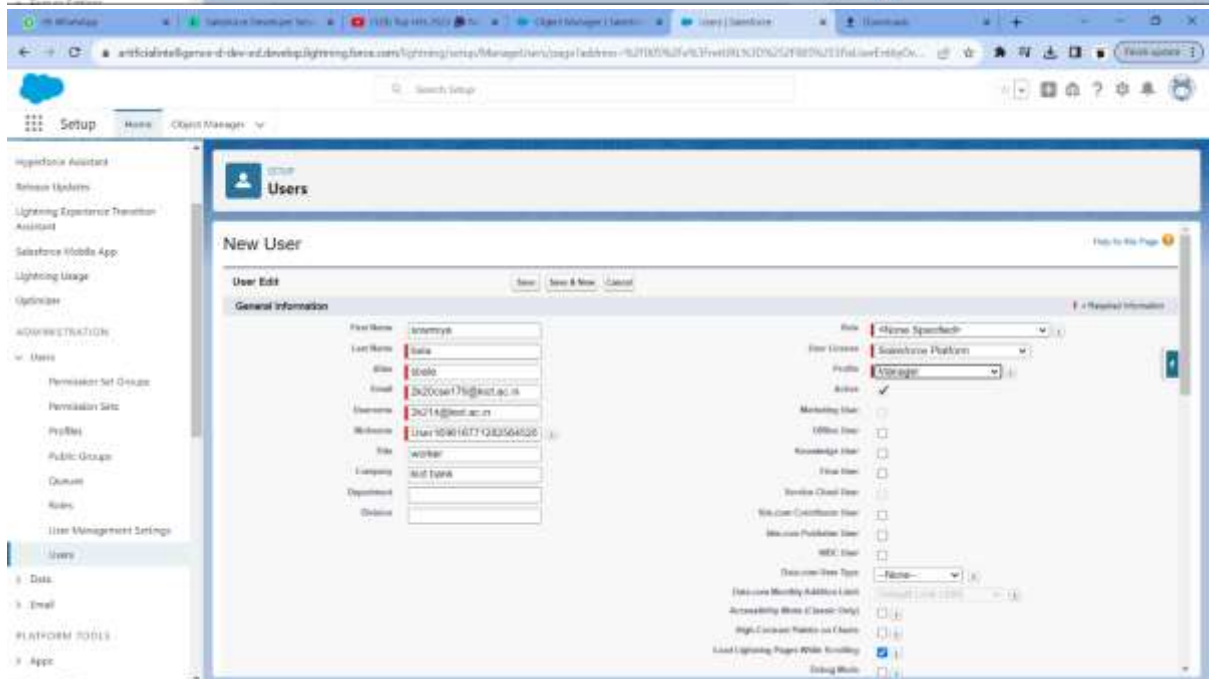
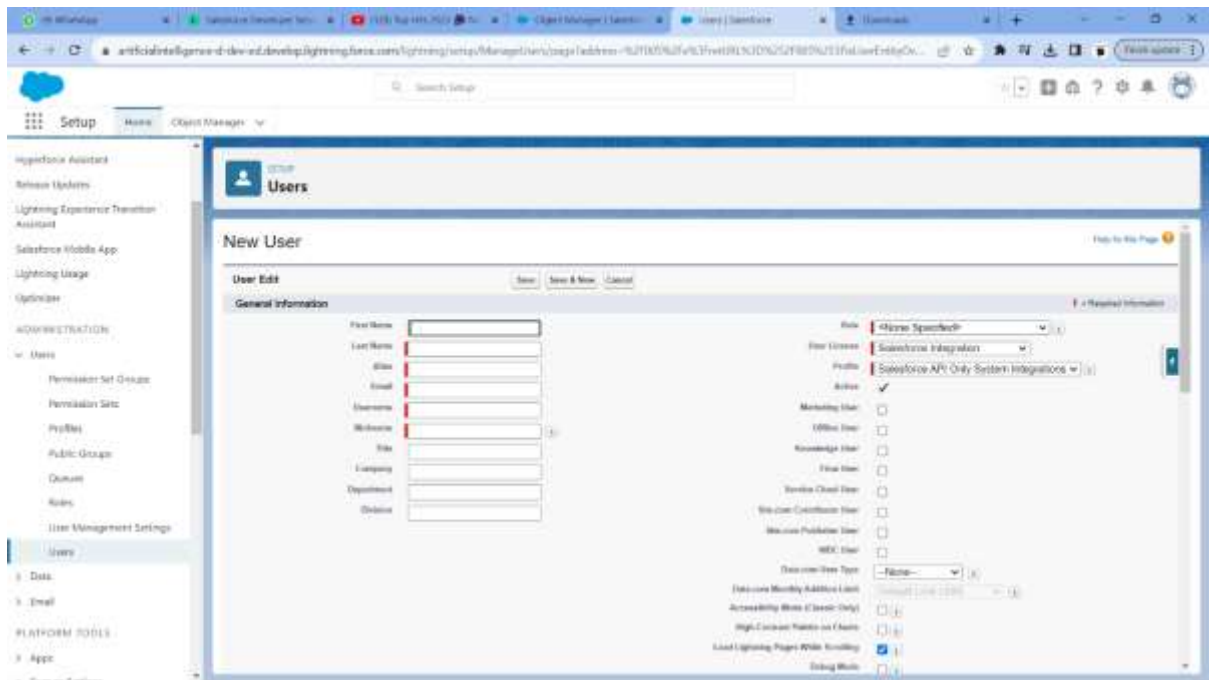


Step 1: Create two separate custom profiles, one for User A and one for User B.









Setup

Users

User: soamiya bala

User Detail

Name	soamiya bala	Role	System Administrator
Email	soamiya.bala@soamiya.com	User License	System Administrator
Username	soamiya.bala@soamiya.com	Profile	System Administrator
Mobile	9198810771230000000000	Active	<input checked="" type="checkbox"/>
Title	System Administrator	Marketing User	<input type="checkbox"/>
Company	soamiya bala	CRM User	<input type="checkbox"/>
Department		Knowledge User	<input type="checkbox"/>
Division		Flow User	<input type="checkbox"/>
Business		Service Cloud User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Contributor User	<input type="checkbox"/>
Locale	English (India)	Business Publisher User	<input type="checkbox"/>
Language	English	DEX User	<input type="checkbox"/>
Outgoing Address		Mobile Push Registration	<input type="checkbox"/>
Manager		Data.com User Type	<input type="checkbox"/>
Security Approval Required On Login	<input type="checkbox"/> If I am an Approver	Accounting Mode (Desktop Only)	<input type="checkbox"/>
Two-Factor Authentication	<input type="checkbox"/>	Desktop Mode	<input type="checkbox"/>
App Registration: One-Time Password Authentication	<input type="checkbox"/>	High-Contrast Patches on Charts	<input type="checkbox"/>
App Registration: Subscriptions	<input type="checkbox"/>	Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>
		Subscriptions CRM Content User	<input checked="" type="checkbox"/>

Gmail

Compose

Mail

Inbox 5,218

Starred

Blocked

Sent

Drafts

More

Labels

support@salesforce.com

11 PM 22 minutes ago

Welcome to Salesforce!

Click below to verify your account.

Verify Account

To easily log in later, save this URL:

<https://artificialintelligence-d-dev-ed.developer.my.salesforce.com>

Username:

[26218@soamiya.com](#)

Again, welcome to Salesforce!

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artificialintelligence-dev-ed.developer.salesforce.com

salesforce

Change Your Password

Enter a new password for **2621@kai.ac.jp**. Make sure to include at least:

- 8 characters
- 1 letter
- 1 number

New Password:

Confirm New Password:

Security Question

In what city were you born?

Answer:

Change Password

Password was last changed on 01/18/2023, 7:33 pm.

login | Salesforce

artificialintelligence-dev-ed.developer.salesforce.com

salesforce

Username:

2621@kai.ac.jp

Password:


Log In

☐ Remember me

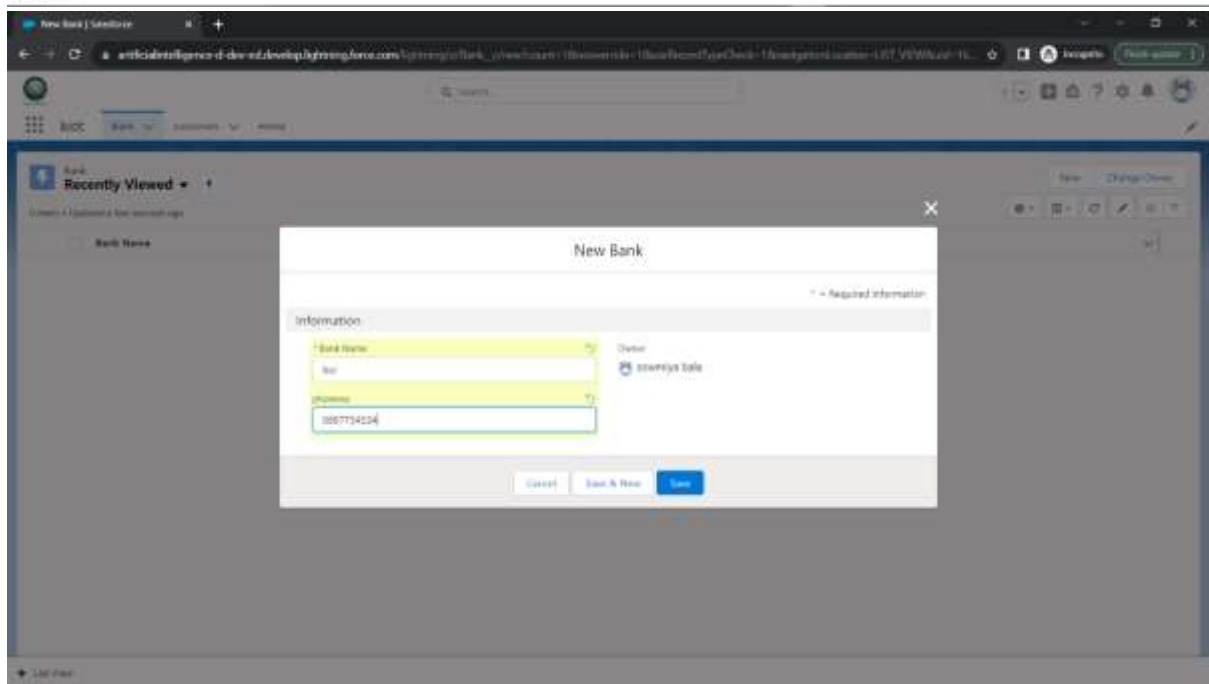
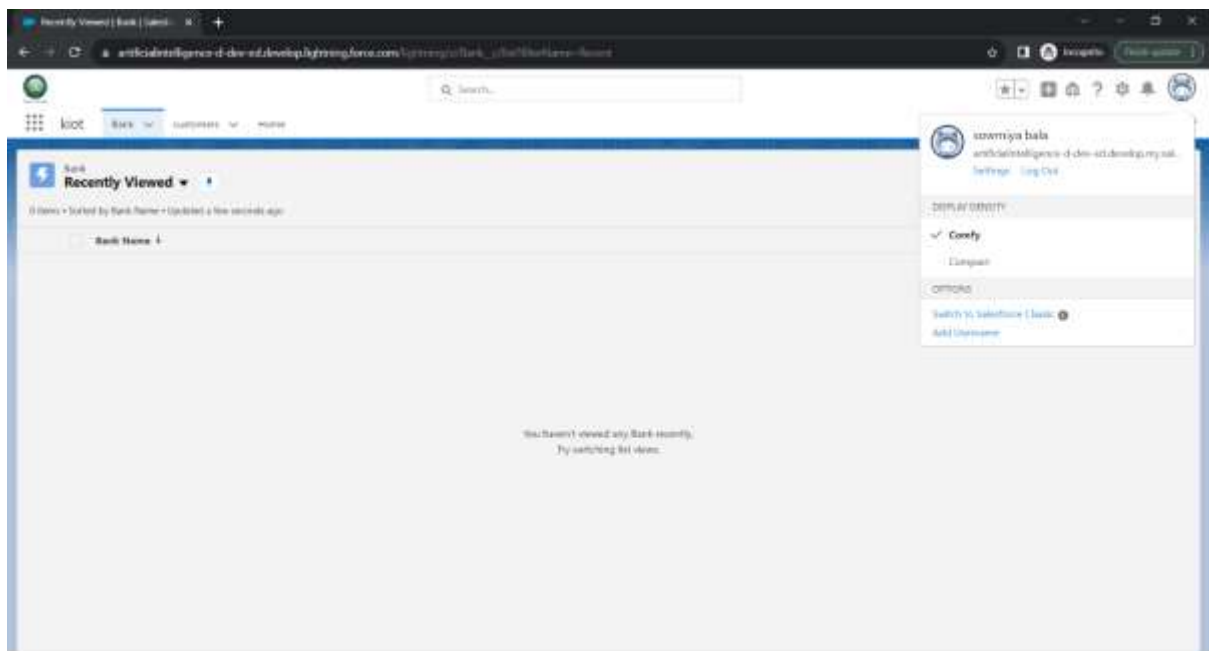
Forgot Your Password?

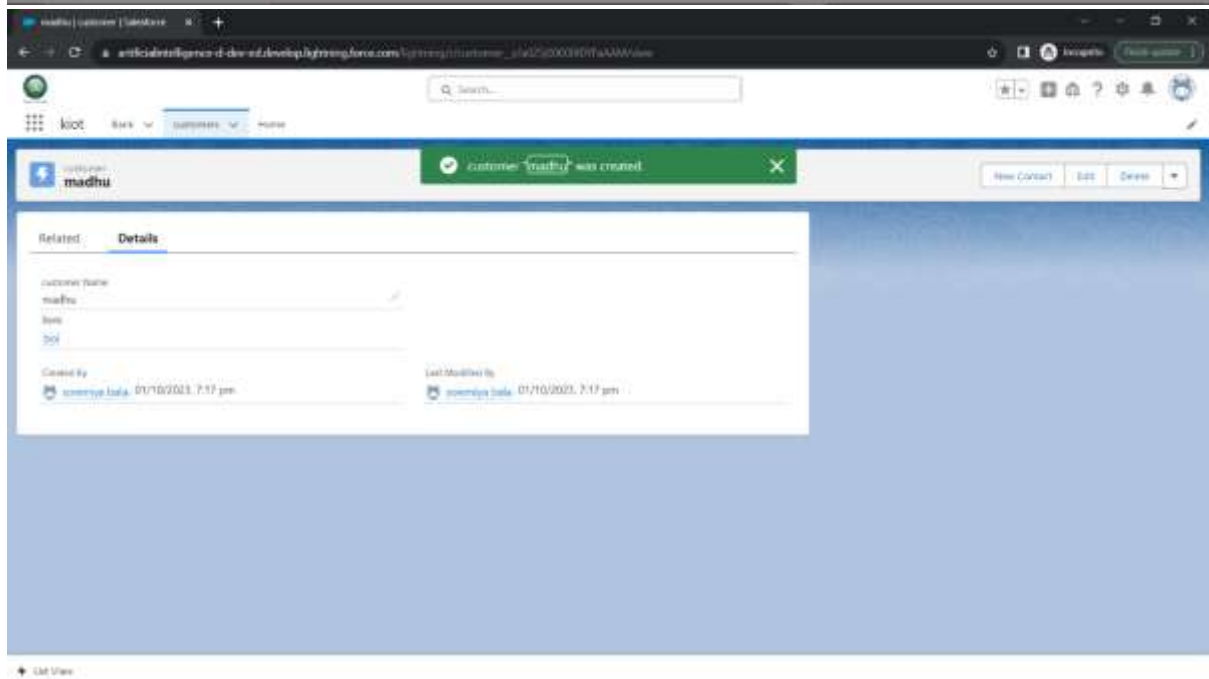
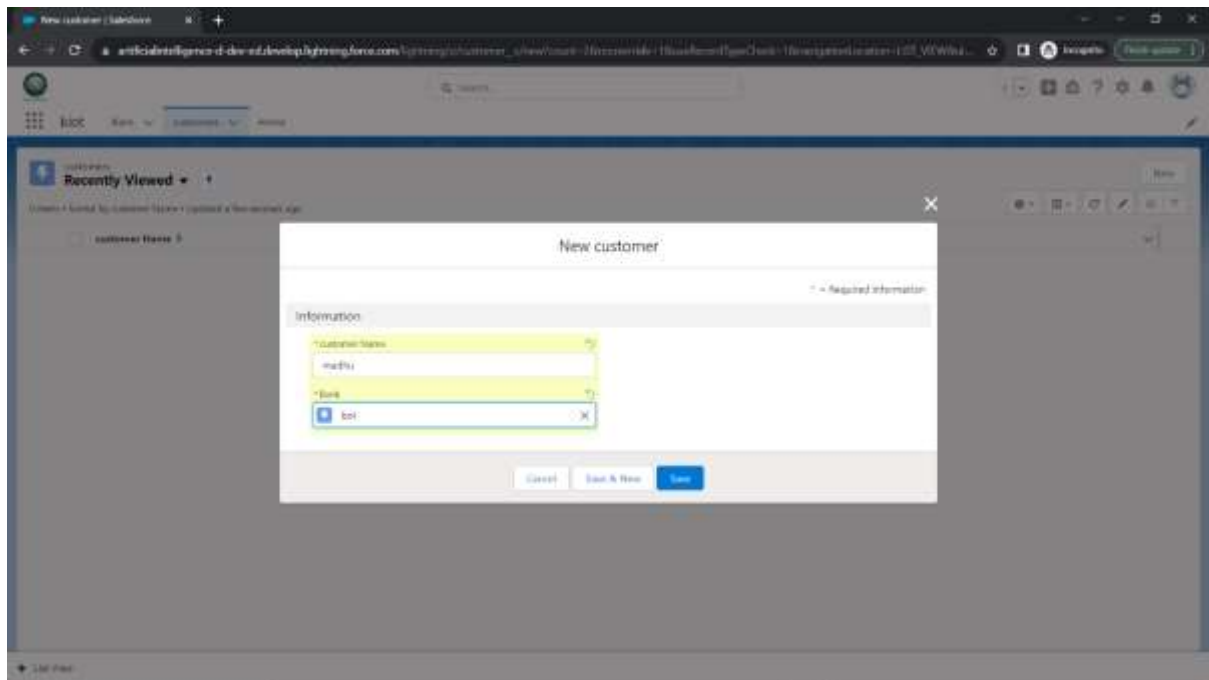
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WATCH ON DEMAND

 **AI Day**

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Setup Profiles

Profiles

Profile: salesmanage

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, see the Edit link in the Record Type Settings section below to make one or more record types available to users with this profile.

Limit Types (0) | Enabled New Classes (0) | Enabled Standard Page Layouts (0) | Enabled Custom Page Layouts (0) | Enabled Custom Record Types (0) | Enabled Custom Metadata Types (0) | Enabled Custom Settings Definitions (0) | Enabled Flow (0) | Enabled Service Process Builder (0) | Enabled Custom Permissions (0)

Profile Detail

Name	salesmanage	Custom Profile	<input checked="" type="checkbox"/>
User License	Salesforce Platform		
Description			
Created By	ADMIN	Modified By	ADMIN
Created On	11/10/2023 7:18 pm	Modified On	11/10/2023 7:18 pm

Page Layouts

Standard Object Layouts

Object	Layout	Ordering Items	Layout
Account	Account Layout (View Assignment)	Account History Layout	(View Assignment)
Case	Case Layout (View Assignment)	Case History Layout	(View Assignment)
Contract	Contract Layout (View Assignment)	Contract History Layout	(View Assignment)
Lead	Lead Layout (View Assignment)	Lead History Layout	(View Assignment)
Opportunity	Opportunity Layout (View Assignment)	Opportunity History Layout	(View Assignment)
Product	Product Layout (View Assignment)	Product History Layout	(View Assignment)
Quote	Quote Layout (View Assignment)	Quote History Layout	(View Assignment)
Order	Order Layout (View Assignment)	Order History Layout	(View Assignment)
Payment	Payment Layout (View Assignment)	Payment History Layout	(View Assignment)
Payment Authorization	Payment Authorization Layout (View Assignment)	Payment Authorization History Layout	(View Assignment)
Payment Authorization Adjustment	Payment Authorization Adjustment Layout (View Assignment)	Payment Authorization Adjustment History Layout	(View Assignment)
Payment Gateway	Payment Gateway Layout (View Assignment)	Payment Gateway History Layout	(View Assignment)

Setup Profiles

Profiles

Profile: salesmanage

Set the permissions and page layouts for this profile.

Profile Edit

Name: salesmanage

User License: Salesforce Platform

Description:

Custom App Settings

Setting	Value	Default
Analytics Studio (standard__Analytics)	<input type="checkbox"/>	<input type="checkbox"/>
App Launcher (standard__AppLauncher)	<input type="checkbox"/>	<input type="checkbox"/>
App (prod)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Platform (standard__Platform)	<input type="checkbox"/>	<input checked="" type="checkbox"/>
SLA (standard__SLA)	<input type="checkbox"/>	<input type="checkbox"/>

Service Provider Access

Tab Settings

Standard Tab Settings

Name: Default On

Is Enabled: ☒

Setup Profiles

Custom Object Permissions

	Read	Create	Edit	Delete	View All	Modify All
Task	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Custom	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Session Settings

Session Timeout After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

User passwords expire in: 30 days

Enforce password history: 3 passwords remembered

Minimum password length: 8

Password complexity requirements: Must include alpha and numeric characters

Password expiration requirements: Cannot contain password

Maximum failed login attempts: 5

Lockout effective period: 15 minutes

Require users to enter password on login: ☐

Require a minimum 1 day password lifetime: ☐

Don't immediately expire data in target password vaults: ☐

Setup Profiles

Custom Object Permissions

	Read	Create	Edit	Delete	View All	Modify All
Task	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Session Settings

Session Timeout After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

User passwords expire in: 30 days

Enforce password history: 3 passwords remembered

Minimum password length: 8

Password complexity requirements: Must include alpha and numeric characters

Password expiration requirements: Cannot contain password

Maximum failed login attempts: 5

Lockout effective period: 15 minutes

Require users to enter password on login: ☐

Require a minimum 1 day password lifetime: ☐

Don't immediately expire data in target password vaults: ☐

Setup Users

New User

User Edit Save Save & New Cancel

General Information

First Name

Last Name

Alias

Email

Username

Work Email

Role

Company

Department

Division

Role

Flow License

Profile

Active ☒

Marketing User ☐

Offline User ☐

Knowledge User ☐

Flow User ☐

Service Cloud User ☐

Web.com Connected User ☐

Web.com Publisher User ☐

MSD User ☐

Flow User Type

Flow User Monthly Additional Cost

Accessing Work (Basic Only) ☐

High Capacity Platform (Basic) ☐

Load Licensing Pages While Installing ☒

Setup Mode ☐

Setup Users

New User

User Edit Save Save & New Cancel

General Information

First Name

Last Name

Alias

Email

Username

Work Email

Role

Company

Department

Division

Role

Flow License

Profile

Active ☒

Marketing User ☐

Offline User ☐

Knowledge User ☐

Flow User ☐

Service Cloud User ☐

Web.com Connected User ☐

Web.com Publisher User ☐

MSD User ☐

Flow User Type

Flow User Monthly Additional Cost

Accessing Work (Basic Only) ☐

High Capacity Platform (Basic) ☐

Load Licensing Pages While Installing ☒

Setup Mode ☐

Change Your Password | Salesforce

Change Your Password

Enter a new password for 2020sm@koot.ac.in. Your new password must include at least:

- 8 characters
- 1 letter
- 1 number

* New Password:

* Confirm New Password:

Security Question

→ In what city were you born?

* Answer:

Password was last changed on 01/08/2025, 7:26 pm

Recently Viewed | Bank | Salesforce

Search...

Bank

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 I-Jser A and I-Jser 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 IJser 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:

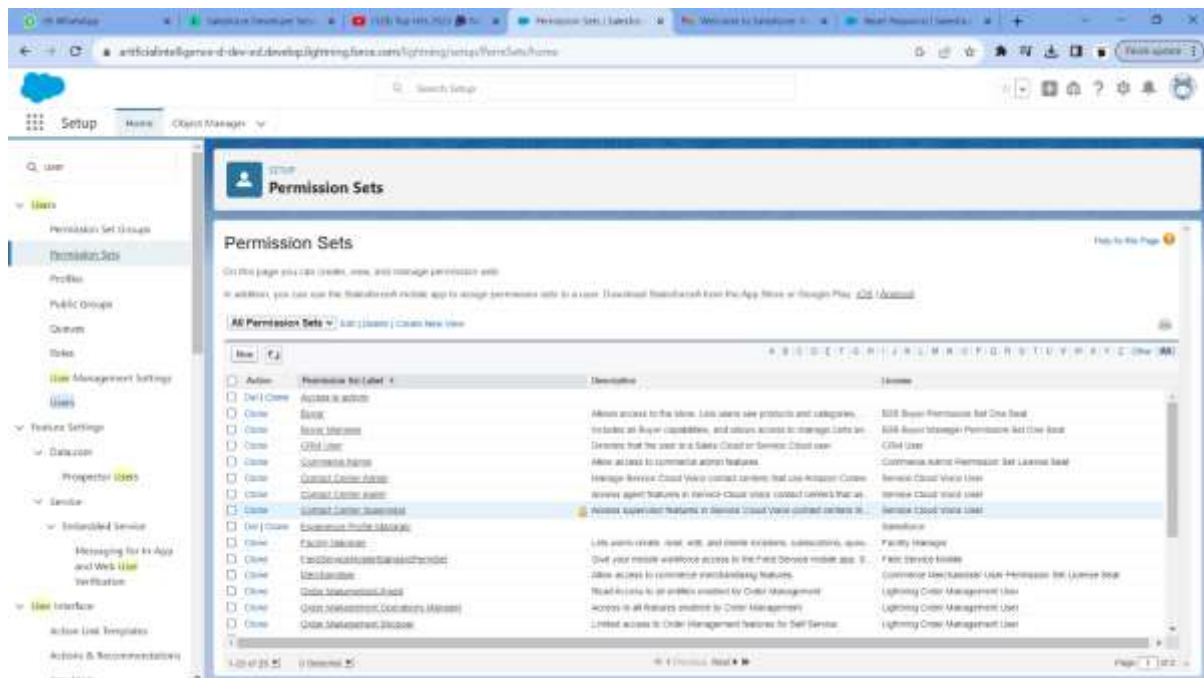
- Ensure that the Account records are owned by the respective users, with User A owning their records and User B owning their records.

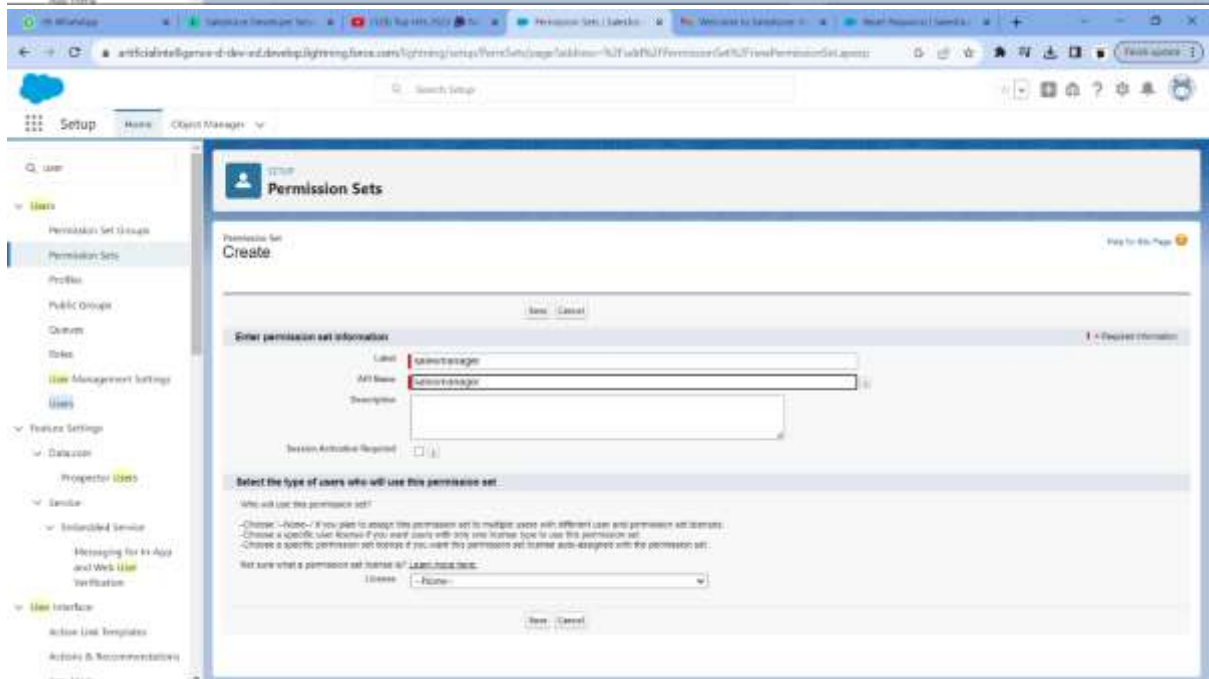
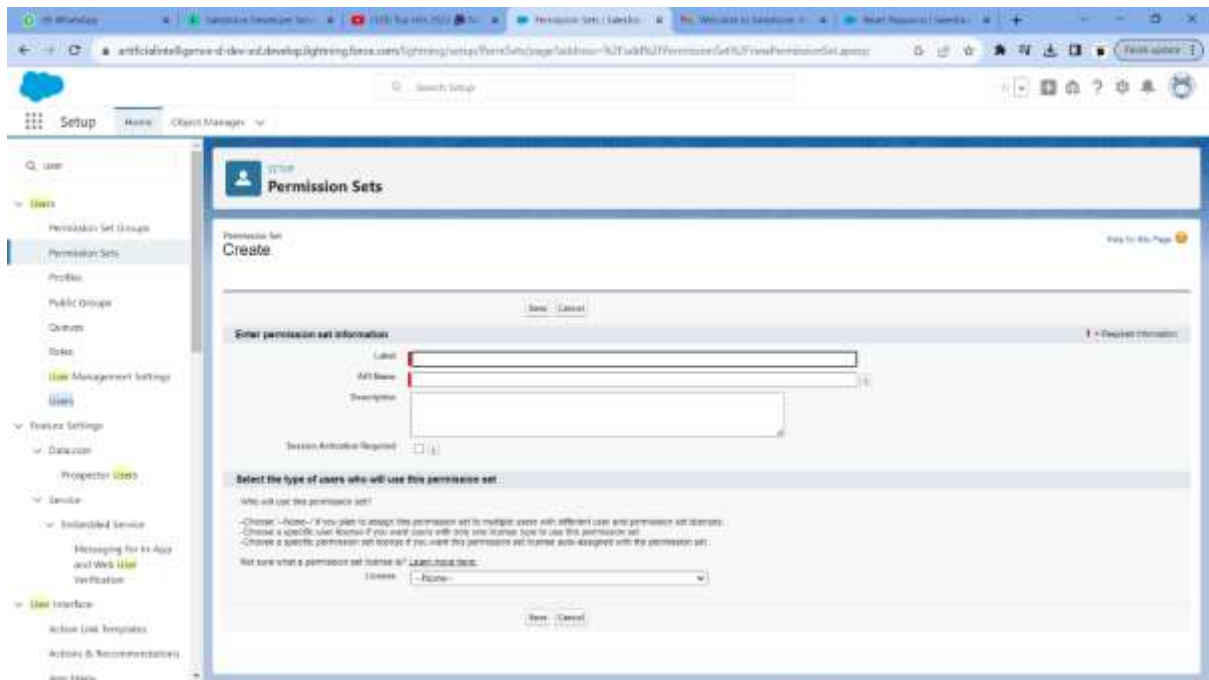
Organization-Wide Defaults:

- 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.





Setup | Home | Object Manager

Search Setup

user

Users

- Permission Set Groups
- Permission Sets
- Profile
- Public Groups
- Quota
- Roles
- Use Management Settings
- Users

Feature Settings

- Data.com
- Projector Users
- Service
- Embedded Service
- Messaging for In-App and Web UI
- Verification

User Interface

- Action Link Templates
- Autosave & Recommendations
- App Store

Permission Sets

Permission Set: **salesmanager**

View Tabular | Help to this Page

Find: First Settings | Edit | Delete | Sub-Properties | Manage Assignments

Permission Set Overview

Description: **salesmanager**

License: **salesmanager**

Service Activation Required: **Yes**

Last Modified By: **SYSTEM** 9/17/2023 7:20 pm

API Name: **salesmanager**

Management Profile: **Standard**

Created By: **SYSTEM** 9/17/2023 7:20 pm

App

ASSIGNED APPS
Settings that specify which apps are visible in the app menu.

AVAILABLE CUSTOMER APPS
Settings that specify which customer apps are visible in the app menu.

CRUISE SETTINGS
Permissions to access objects and fields, and settings such as availability.

SAIL PERMISSIONS
Permissions to perform app-specific actions, such as Manage Car Center.

SALE CRM APPS
Permissions to access App classes.

YOURTRACK FINE APPS
Permissions to execute instance pages.

SERIAL DATA BRIDGE APPS
Permissions to authenticate against external data sources.

FLINK APPS
Permissions to execute Flink jobs.

Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform.

LINKED APPS

Setup | Home | Object Manager

Search Setup

user

Users

- Permission Set Groups
- Permission Sets
- Profile
- Public Groups
- Quota
- Roles
- Use Management Settings
- Users

Feature Settings

- Data.com
- Projector Users
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- Embedded Service
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- Verification

User Interface

- Action Link Templates
- Autosave & Recommendations
- App Store

Permission Sets

Permission Set: **salesmanager**

View Tabular | Help to this Page

Find: First Settings | Edit | Delete | Sub-Properties | Manage Assignments

Permission Set Overview | **Object Settings**

Object Settings

Object Name	Object Permissions	Total Fields	Tab Settings
Accounts	No Access	43	—
Account Relationships	No Access	—	—
Account Relationships	No Access	—	—
Account Relationships	No Access	—	—
Account Relationships	No Access	27	—
Account Relationships	No Access	14	—
Account Relationships	No Access	—	—
Account Relationships	No Access	—	—
Account Relationships	No Access	5	—
Account Relationships	No Access	11	—
Account Relationships	No Access	4	—
Account Relationships	No Access	—	—
Account Relationships	No Access	—	—
Account Relationships	No Access	—	—
Account Relationships	No Access	6	—
Account Relationships	No Access	20	—
Account Relationships	No Access	19	—
Account Relationships	No Access	19	—
Account Relationships	No Access	42	—
Account Relationships	No Access	11	—

Account Relationships

Setup | Home | Object Manager

Search Setup

Users

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

Feature Settings

- Data.com
- Projector Users
- Service
- Embedded Service
- Messaging for In-App and Web User
- Verification

User Interface

- Action Link Templates
- Actions & Recommendations

Permission Sets

Permission Set: **salesmanager** Video Tutorial | Help for this Page

[New](#) [Edit](#) [Delete](#) [Sub-Permissions](#) [Manage Assignments](#)

Permission Set Overview | **Object Settings** | **Fields**

Basic Edit

Tab Settings

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

Object Permissions

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

Field Permissions

Field Name	Read Access	Edit Access
Birth Name	<input type="checkbox"/>	<input type="checkbox"/>
Created By	<input type="checkbox"/>	<input type="checkbox"/>
Last Modified By	<input type="checkbox"/>	<input type="checkbox"/>

Setup | Home | Object Manager

Search Setup

Users

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

Feature Settings

- Data.com
- Projector Users
- Service
- Embedded Service
- Messaging for In-App and Web User
- Verification

User Interface

- Action Link Templates
- Actions & Recommendations

Permission Sets

Permission Set: **salesmanager** Video Tutorial | Help for this Page

[New](#) [Edit](#) [Delete](#) [Sub-Permissions](#) [Manage Assignments](#)

Permission Set Overview | **Object Settings** | **Fields**

Basic New Cancel

Tab Settings

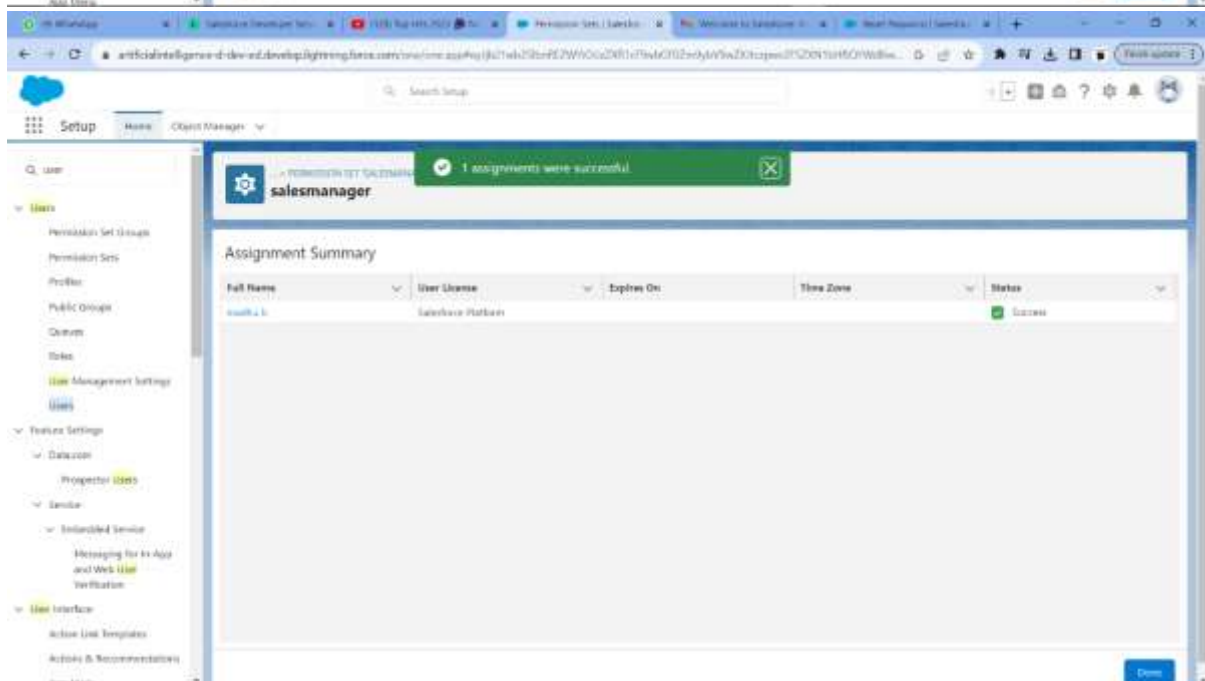
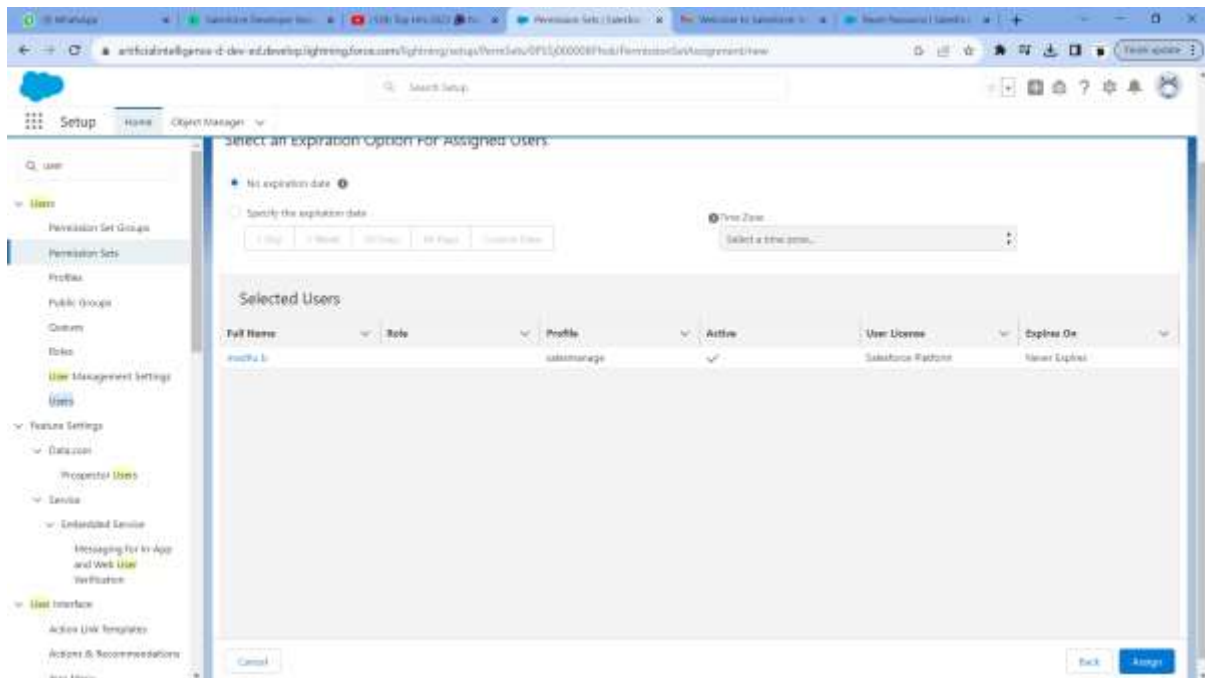
Available	Visible
<input type="checkbox"/>	<input type="checkbox"/>

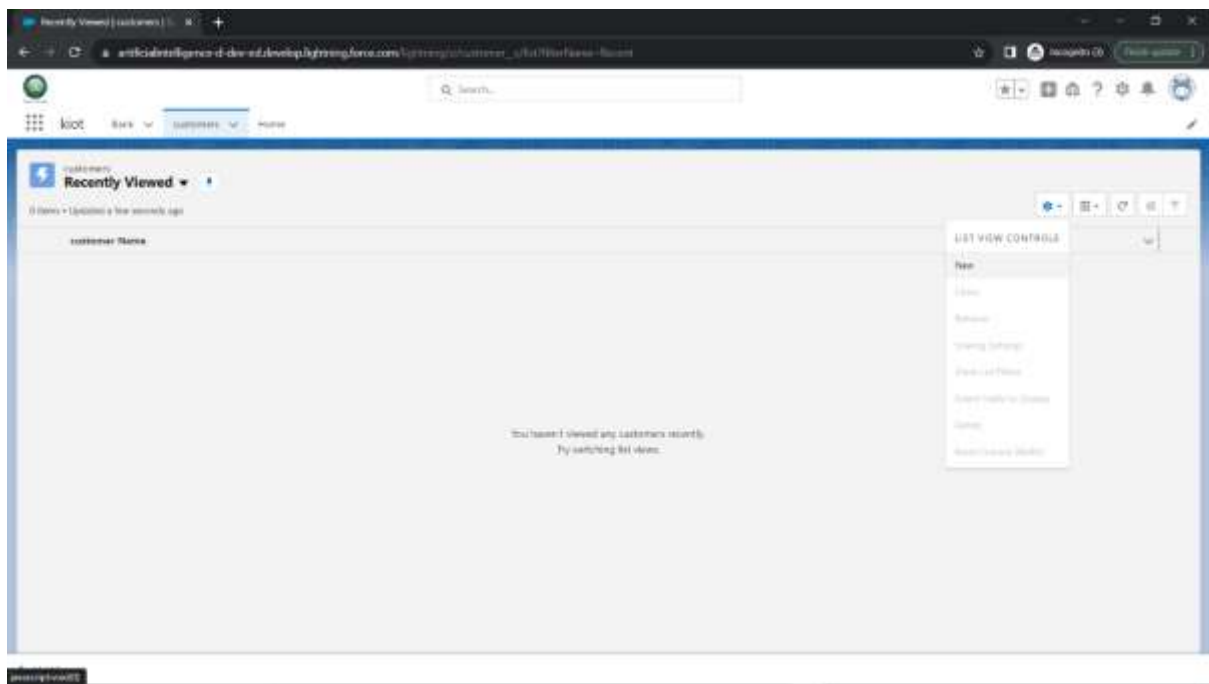
Object Permissions

Permission Name	Enabled
Add	<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
Birth Name	<input type="checkbox"/>	<input type="checkbox"/>
Created By	<input type="checkbox"/>	<input type="checkbox"/>
Last Modified By	<input type="checkbox"/>	<input type="checkbox"/>



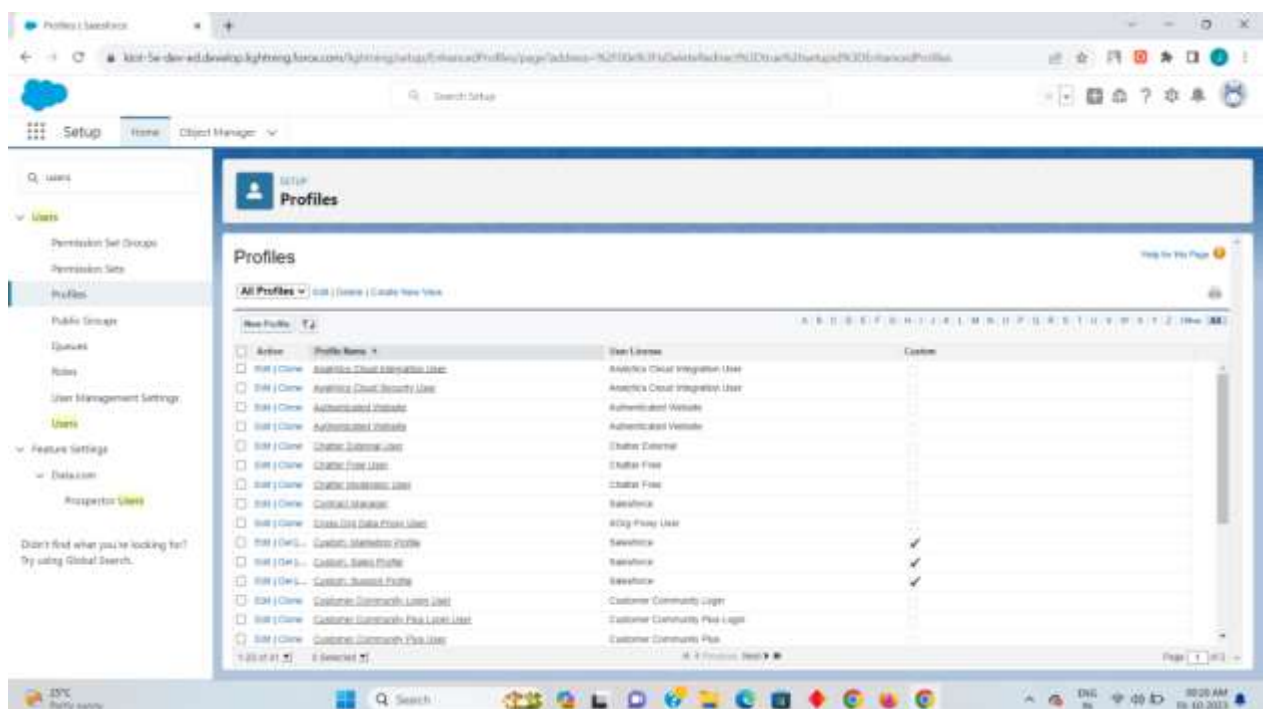


3. Suppose there are 2 Users and they are having Create, Read, Edit access on Account Object with the same profile but we want to open up the access for one user to delete how will you implement the Security setting.

Solution:

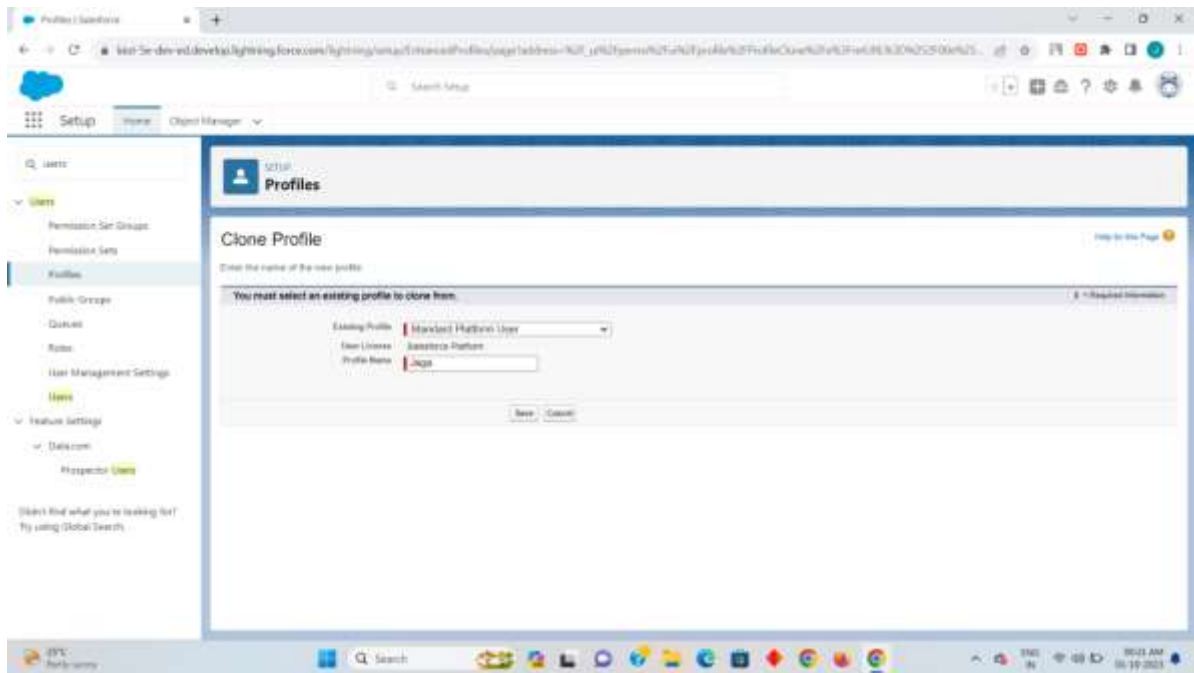
Step 1: we need create a profile for the two user which has the access to Create, Read, Edit for follow as per.

Setup-quick search[profile]



Step 2:

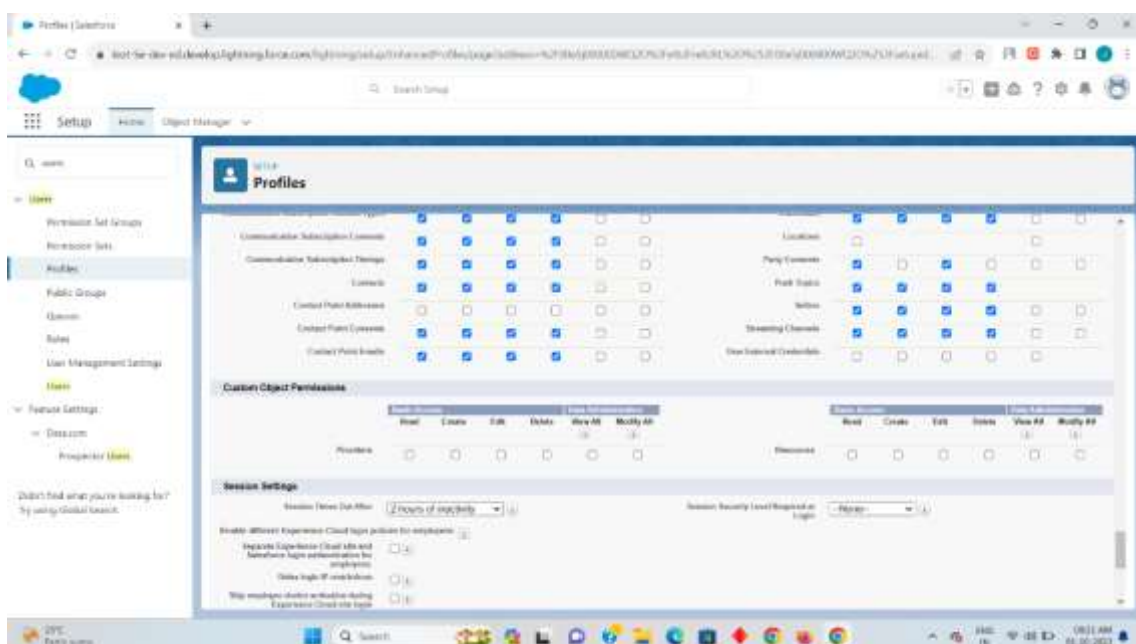
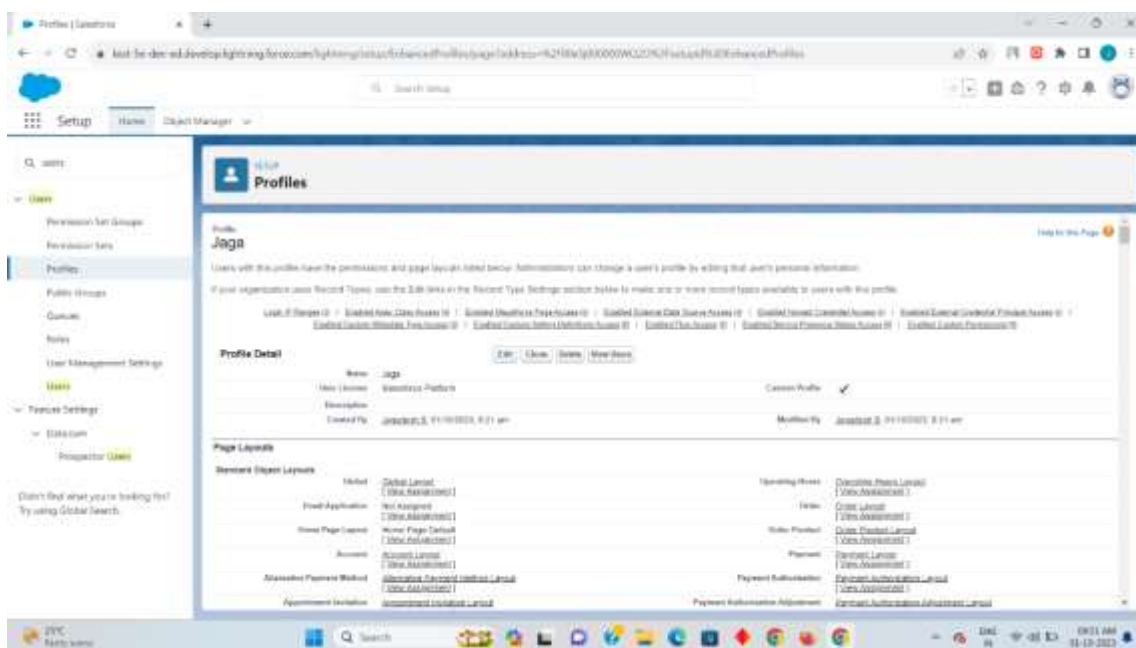
Click on the new to create a new profile along with the label and Api



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

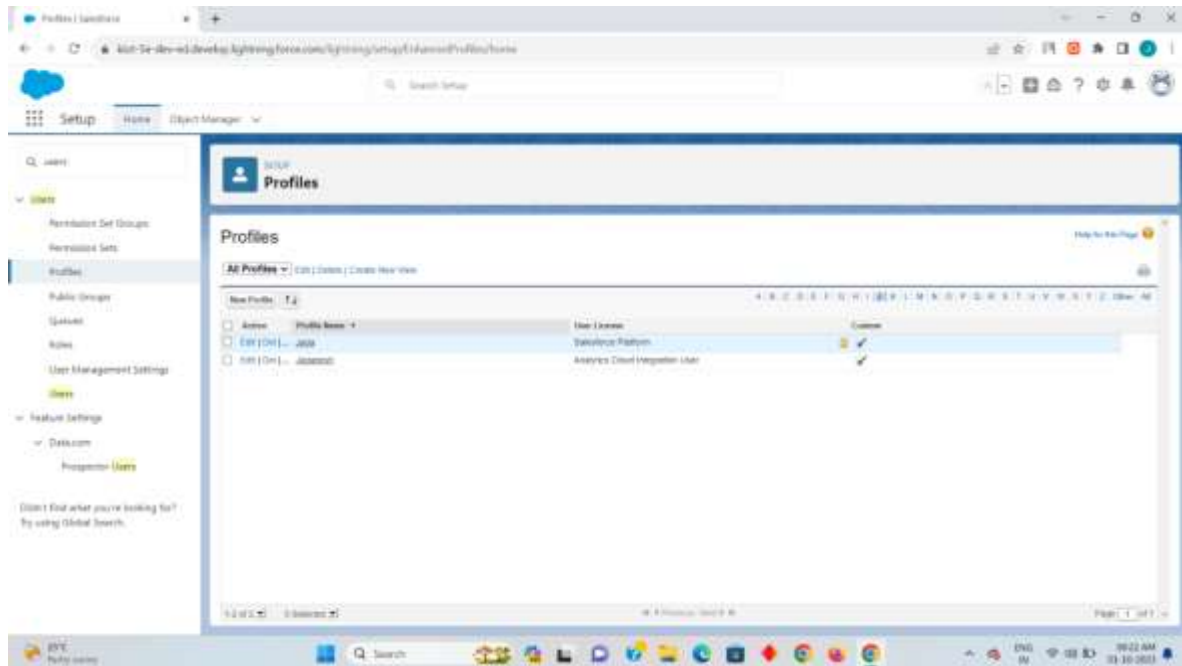
Step 3:

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.



Step 4

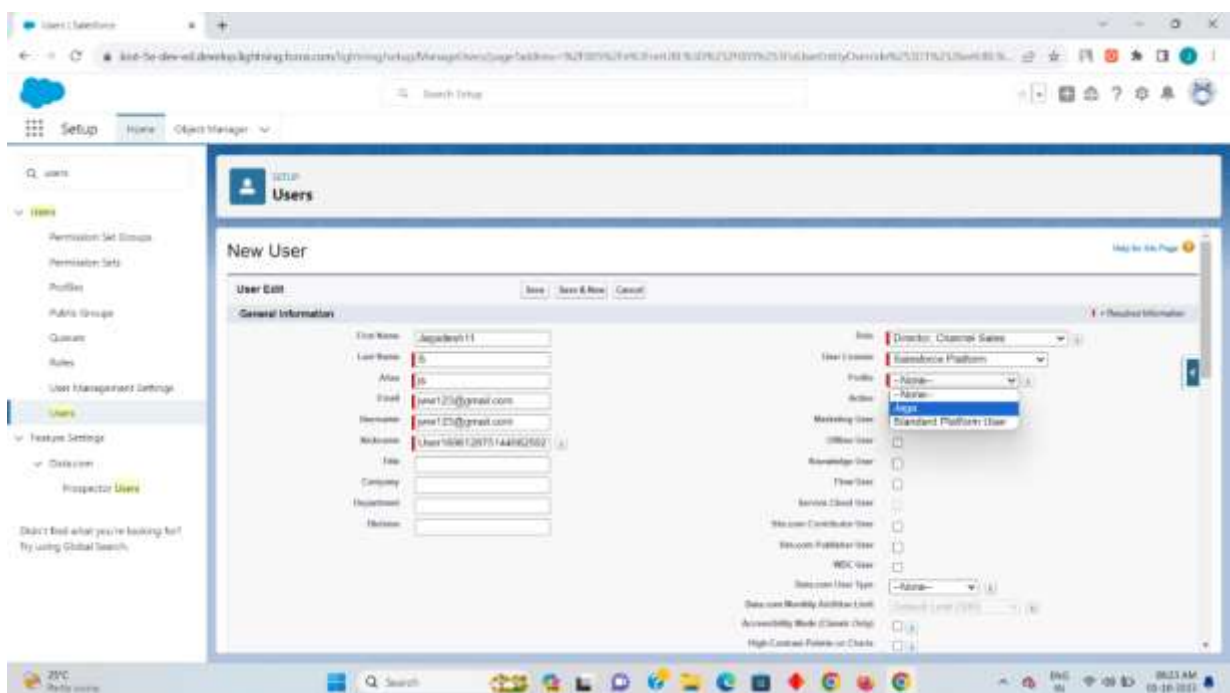
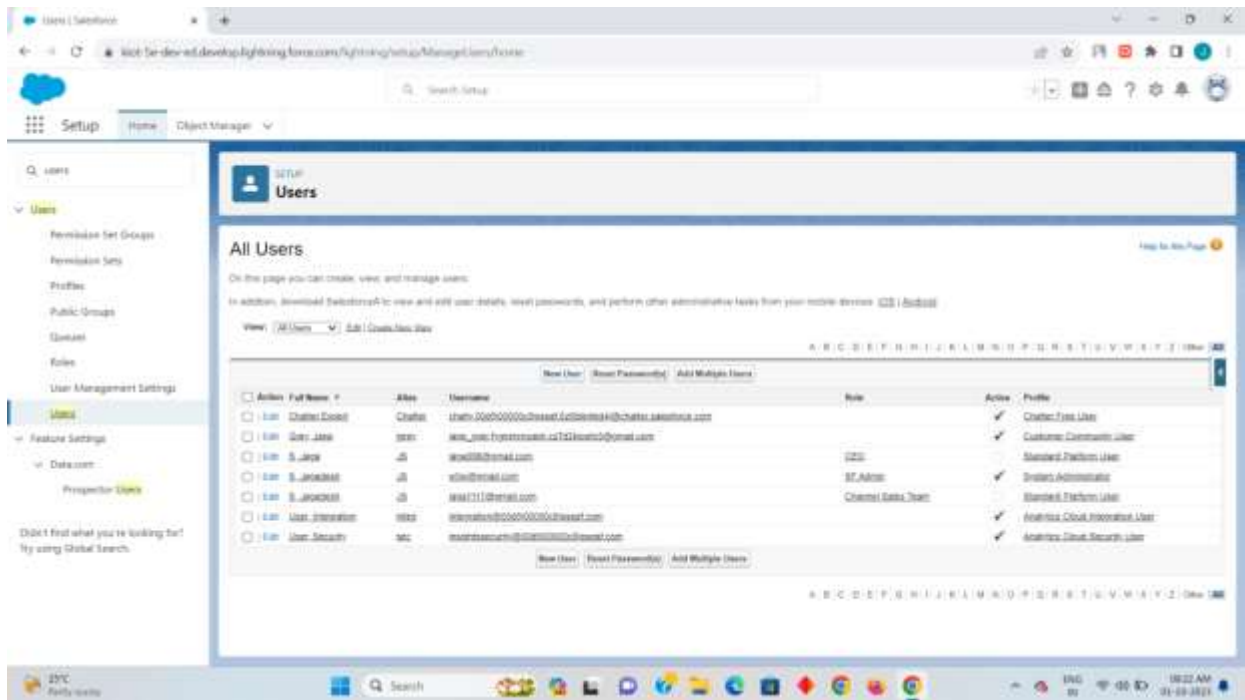
Now you can preview your created profile on the profile option here my profile name has been created with the access of read,create,edit along with view on it

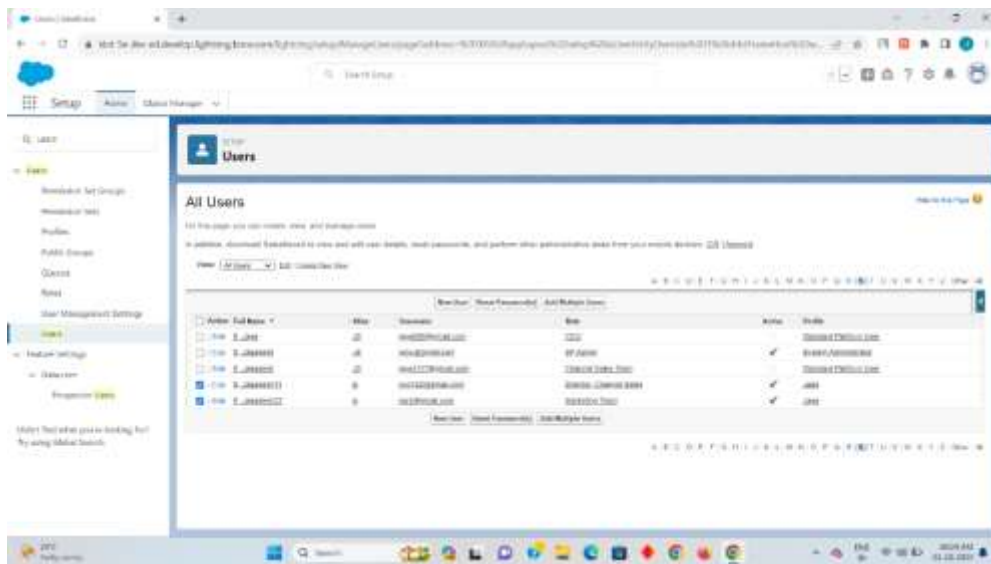


Step 5:

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

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



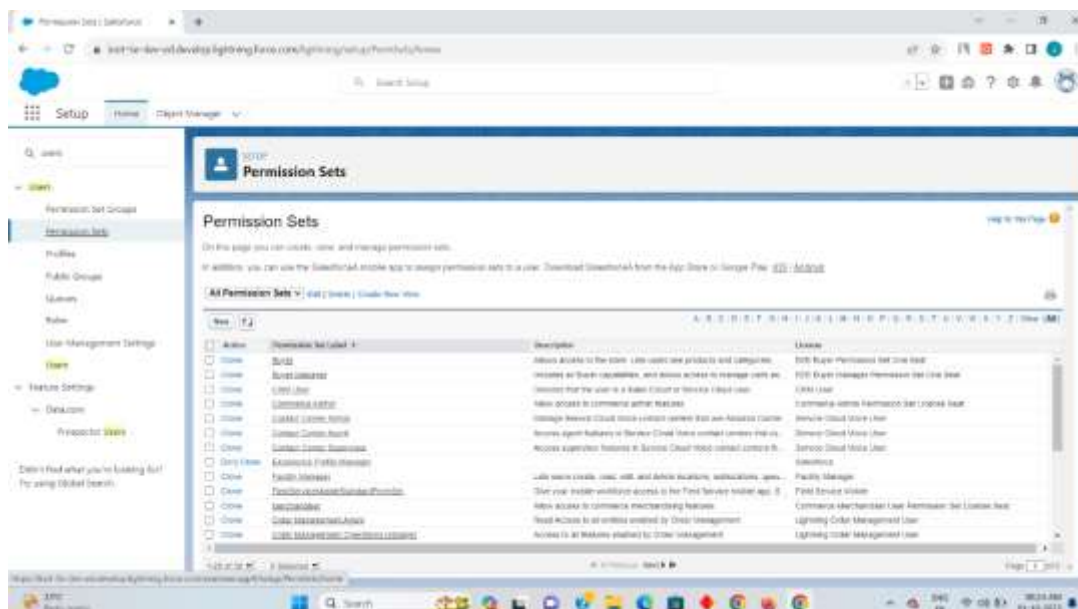


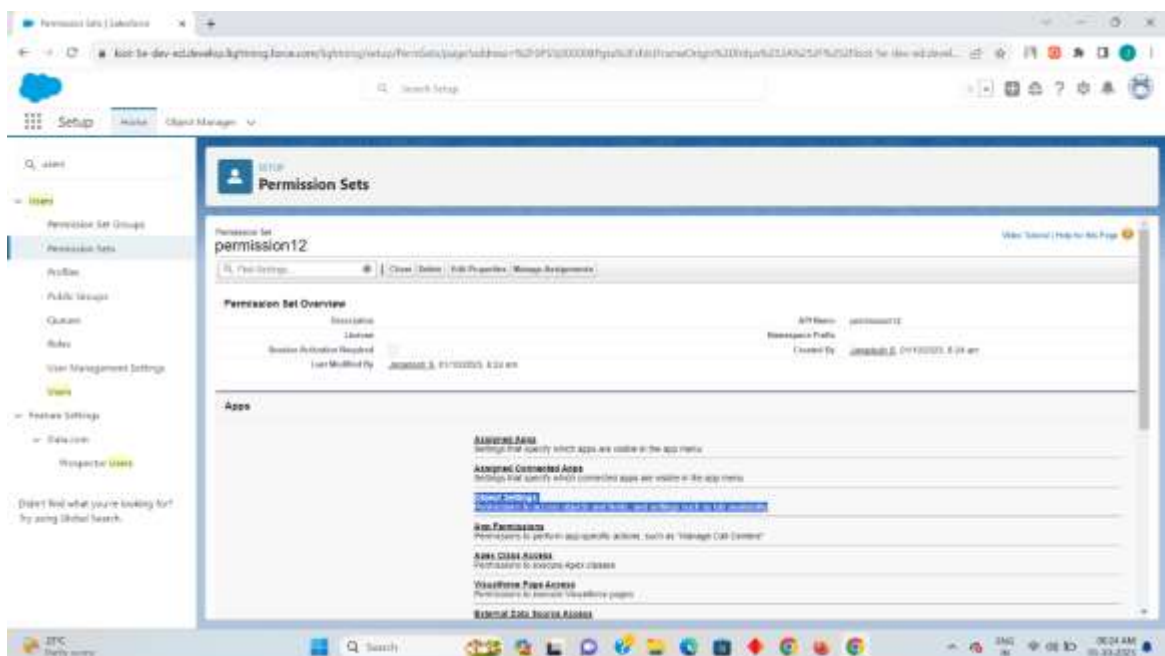
Now you can preview your two user that you have created in my side I had create the two users a Jagadesh11 and Jagadesh22 as a director channel sales with the marketing team.

Step 6:

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

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





Permission Sets | Salesforce

Search Setup

Setup Home Object Manager

Users

- Permission Set Groups
- Permission Sets**
- Profiles
- Public Groups
- Queues
- Roles
- User Management Settings
- Users
- Feature Settings
- Data.com
- Proprietary Users

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

12:10P Permission Sets

permission12

View Settings Help for this Page

Permission Set Overview Object Settings

Object Settings

Object Name	Object Permissions	Total Fields	Tab Settings
Account	No Access	6	—
Account Relationship	No Access	44	—
Account Relationship	No Access	—	—
Alternative Payment Methods	No Access	27	—
ATI Account Email Status	No Access	13	—
ATI Account Query Results	No Access	—	—
Association License Assignments	No Access	—	—
Association Call Records	No Access	9	—
Association Invitations	No Access	17	—
Association Orders	—	4	—
Association Account Assignments	No Access	—	—
Association Schedule Lines	No Access	6	—
Association Time Zone Rules	No Access	6	—
Event Actions	No Access	30	—
Event Action Results	No Access	10	—

39°C Paris, France

Permission Sets | Salesforce

Search Setup

Setup Home Object Manager

Users

- Permission Set Groups
- Permission Sets**
- Profiles
- Public Groups
- Queues
- Roles
- User Management Settings
- Users
- Feature Settings
- Data.com
- Proprietary Users

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

12:10P Permission Sets

permission12

View Settings Help for this Page

Permission Set Overview Object Settings Accounts

Accounts

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 type="checkbox"/>
Modify All	<input type="checkbox"/>

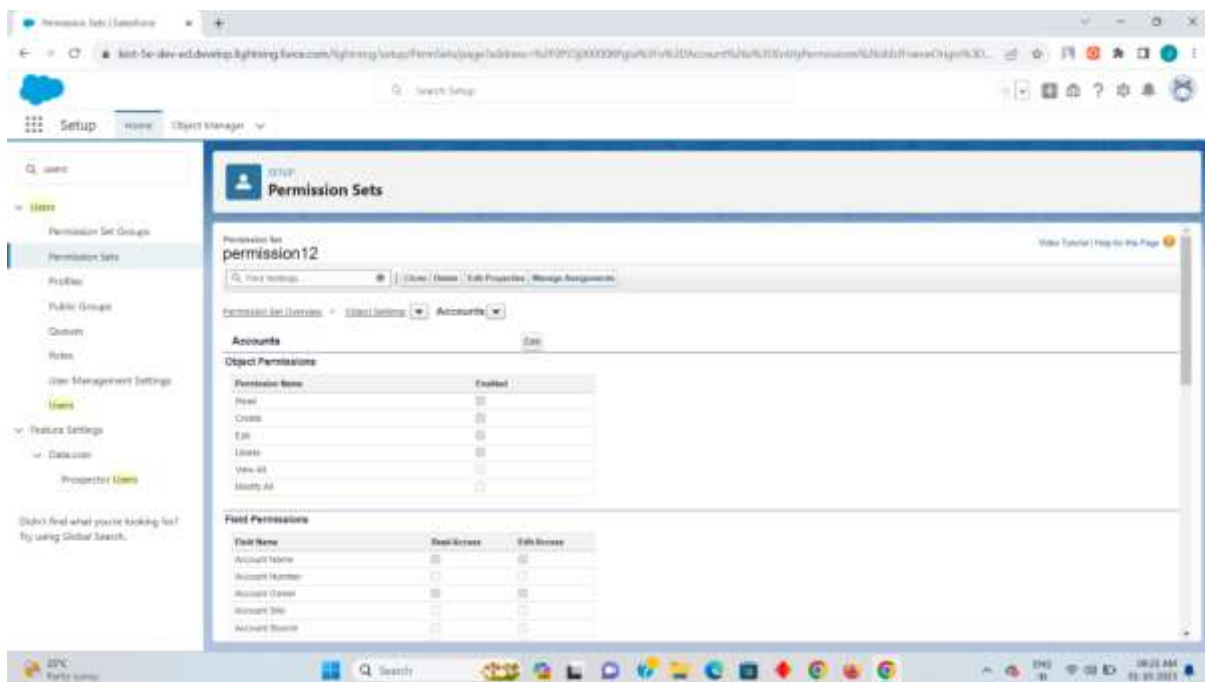
Field Permissions

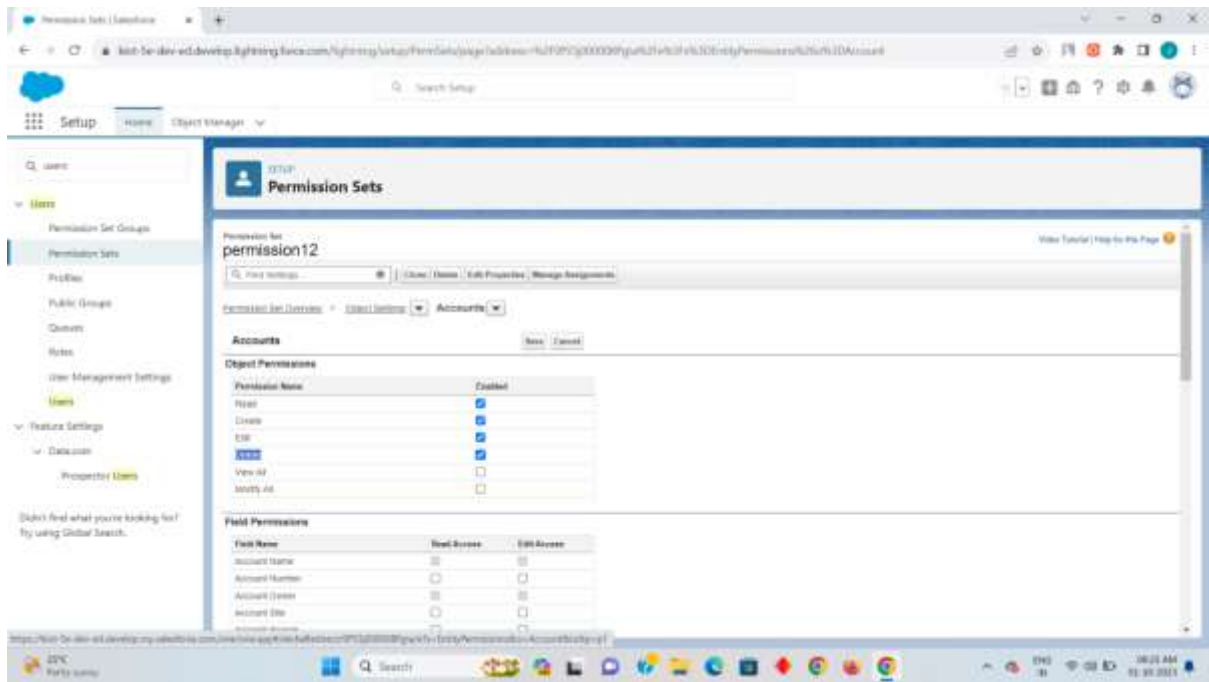
Field Name	Read Access	Edit Access
Account Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Account Number	<input type="checkbox"/>	<input type="checkbox"/>
Account Owner	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Account Title	<input type="checkbox"/>	<input type="checkbox"/>
Account Status	<input type="checkbox"/>	<input type="checkbox"/>

39°C Paris, France

Step 7:

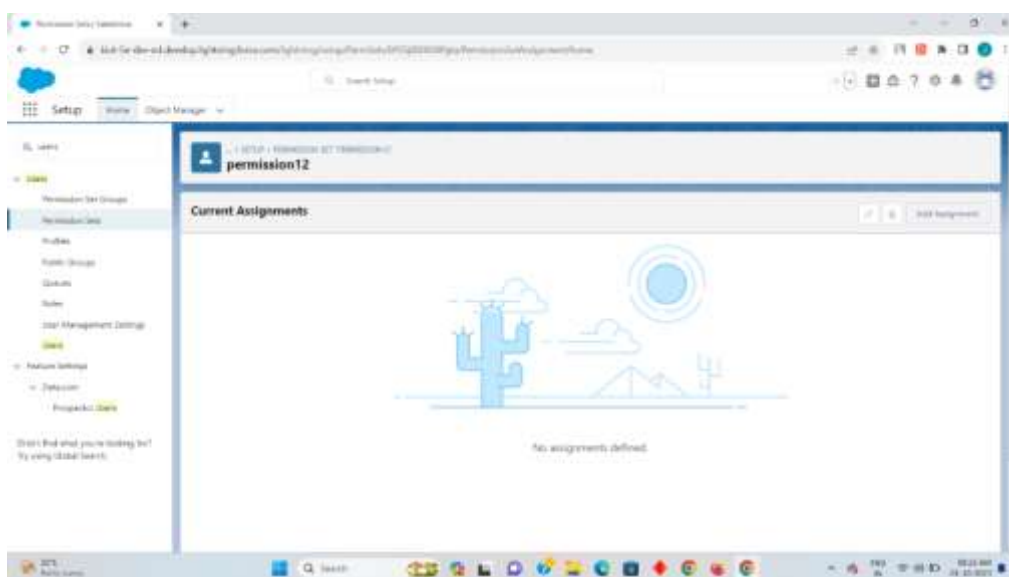
Now to give the specific delete access to the user click on edit on the Account and then enable the read,create,edit and the delete on it so that the permission set will have a specific special access on it. once it has been done click on save and then click on manage assignment.

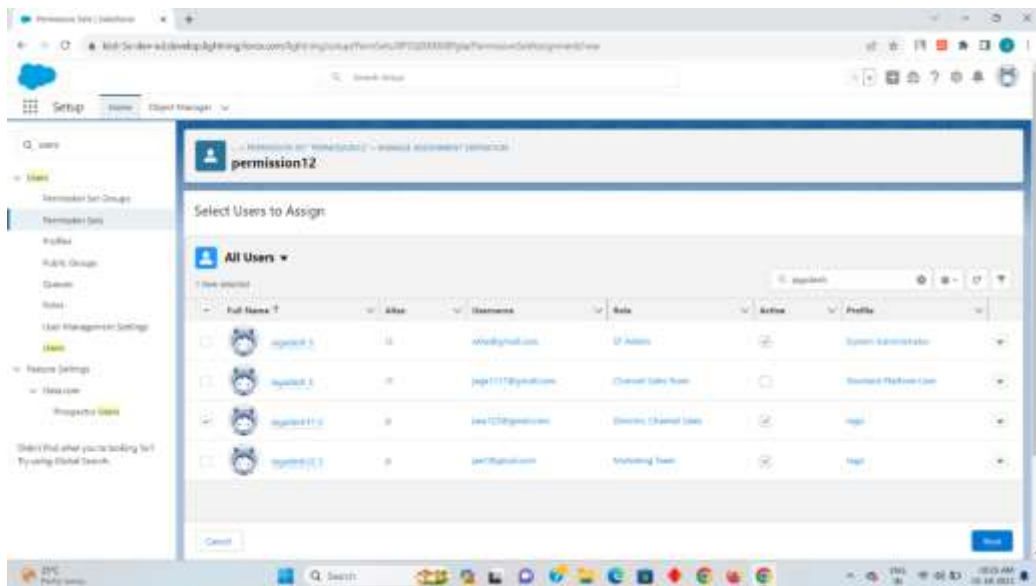
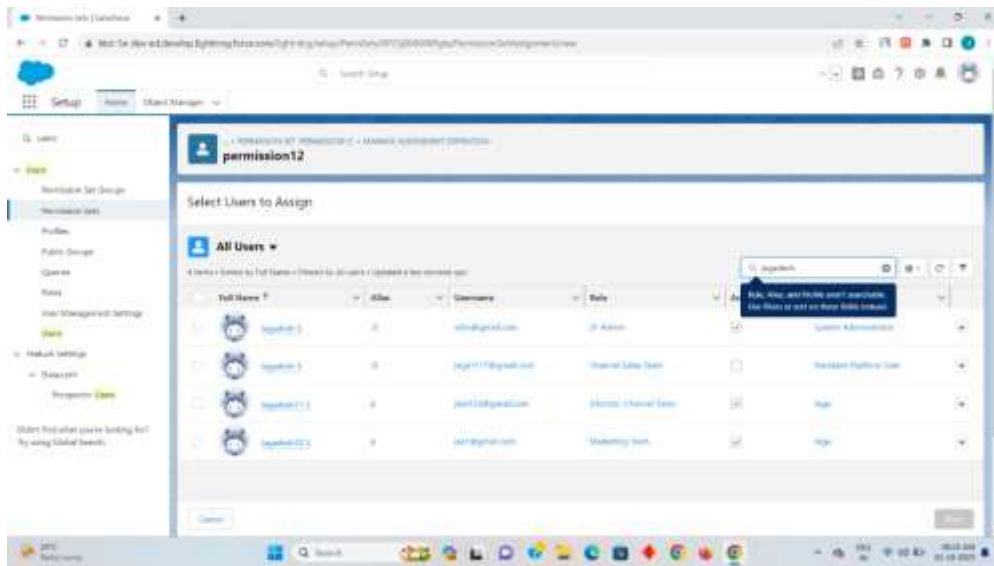




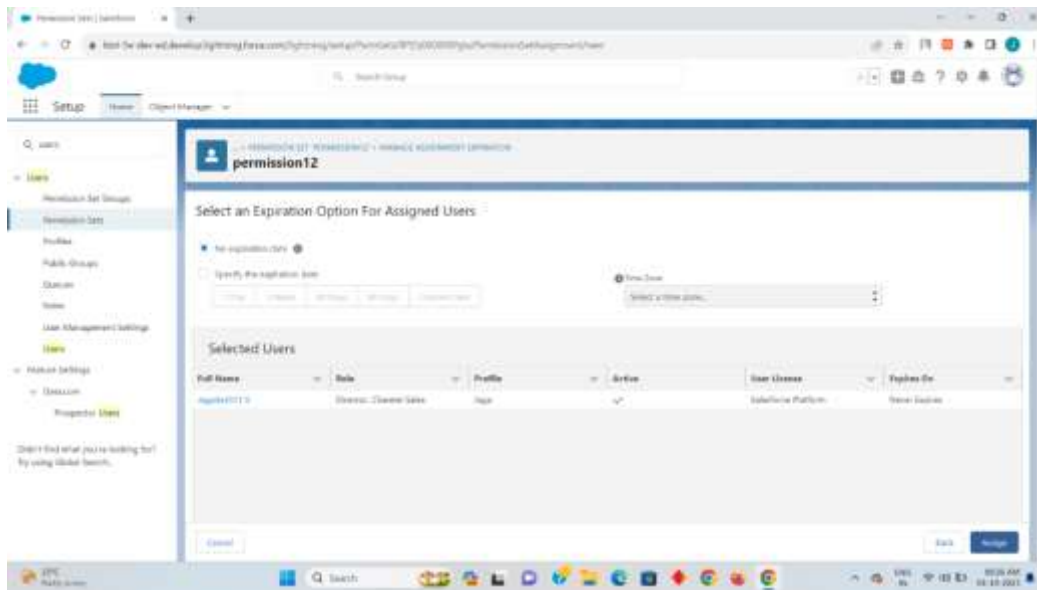
Step 8

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

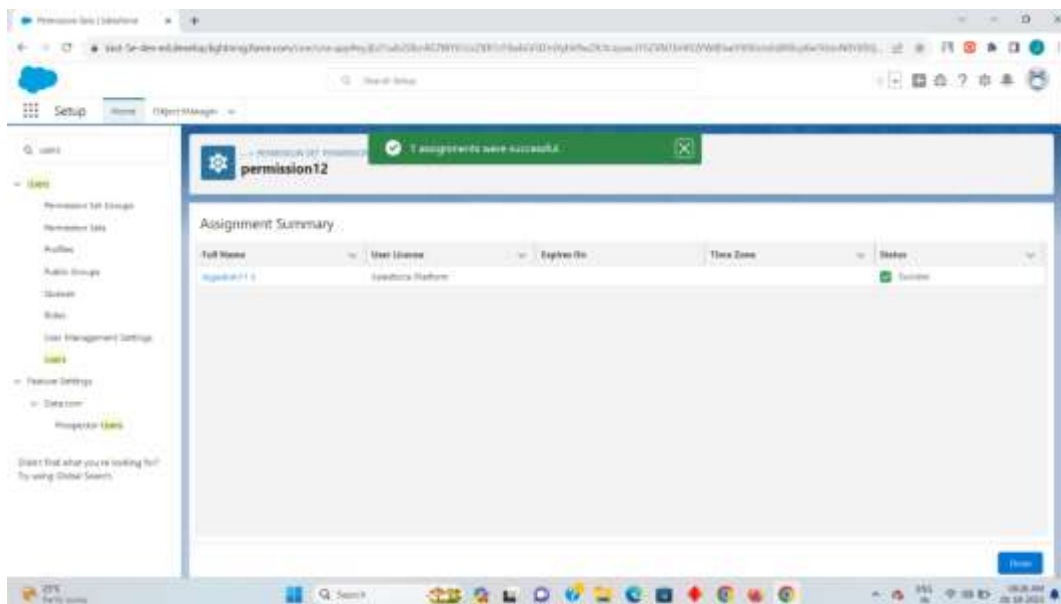




Click on next.



Now click on Assign.



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


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

Solution:

Step 1: Create a Custom Object

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

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



SETUP > OBJECT MANAGER

Survey Result

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Search Layouts for Salesforce Classic

Triggers

Validation Rules

Fields & Relationships

Quick Find

New Deleted Fields Field Dependencies Set History Tracking

8 Items, Sorted by

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Comment	Comment__c	Text Area(255)		
Created By	CreatedById	Lookup(User)		
Email	Email__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name__c	Text(51)		
Owner	OwnerId	Lookup(User,Group)		✓
Rating	Rating__c	Picklist		
Survey Result Name	Name	Auto Number		✓

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

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

Email Template: **Thank You Email - Survey** Edit in Builder Edit Clone

Details Related

Information

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

Message Content

Subject Thank You For Completing Our Survey!	Enhanced Letterhead
<p>HTML Value</p> <div style="display: flex; justify-content: space-between;"> <div style="width: 30%; background-color: #e0e0e0; height: 100px;"></div> <div style="width: 40%;"> <p>Hi {{{Survey_Result__c.Name__c}}},</p> <p>Thanks for taking time out to participate in our survey. We are very appreciative of the time you have taken to assist in our analysis, and commit to utilizing the information gained to contemplate and implement worthwhile improvements. We will share these results with you through your State Survey Agency, whom we also thank for their generous participation.</p> <p>Once again, we are extremely grateful for your contributing your valuable time, your honest information, and your thoughtful suggestions.</p> <p>Thanks, Automation Champion</p> </div> <div style="width: 30%; background-color: #e0e0e0; height: 100px;"></div> </div>	

Additional Information

Created By Rakesh Gupta, 12/21/2020, 4:23 PM	Last Modified By Rakesh Gupta, 12/21/2020, 4:32 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**:

8. Click **Save**.

The screenshot shows the 'Edit Email Alert' interface for a 'Survey - Thank You Email'. The page has a header with 'Edit Email Alert' and 'Survey - Thank You Email', and a 'Help for this Page' link. Below the header is a descriptive paragraph. The main section is titled 'Email Alert Edit' and contains several fields: 'Description' (Survey - Thank You Email), 'Unique Name' (Survey_Thank_You_Email), 'Object' (Survey Result), 'Email Template' (Thank You Email - Survey), and 'Protected Component' (unchecked). Below these is the 'Recipient Type' section, which includes a search bar with 'User' entered and a 'Find' button. The 'Recipients' section is divided into 'Available Recipients' (listing Integration User, Rakesh Gupta, and Security User) and 'Selected Recipients' (listing Email Field: Email). There are 'Add' and 'Remove' buttons between the two lists. Below the recipients is a text area for 'Additional Emails' with a note: 'You can enter up to five (5) email addresses to be notified.' At the bottom, there is a 'From Email Address' section with a dropdown menu showing 'Current User's email address' and a checkbox to 'Make this address the default From email address for this object's email alerts.' The page ends with 'Save', 'Save & New', and 'Cancel' buttons.

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

Save Response

* API Name

Save_Response

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

Survey Result

Set Field Values for the Survey Result

Field

Comment__c

←

Value

A Comment X

Field

Email__c

←

Value

A Email > Value X

Field

Name__c

←

Value

{!Name.firstName} {!Name.lastName}

Field

Rating__c

←

Value

A Rating X

+ Add Field

☐ Manually assign variables

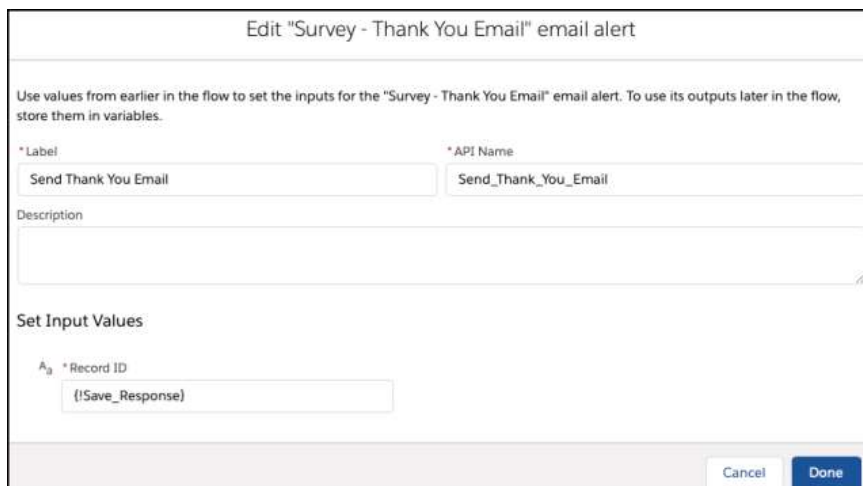
Cancel

Done

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

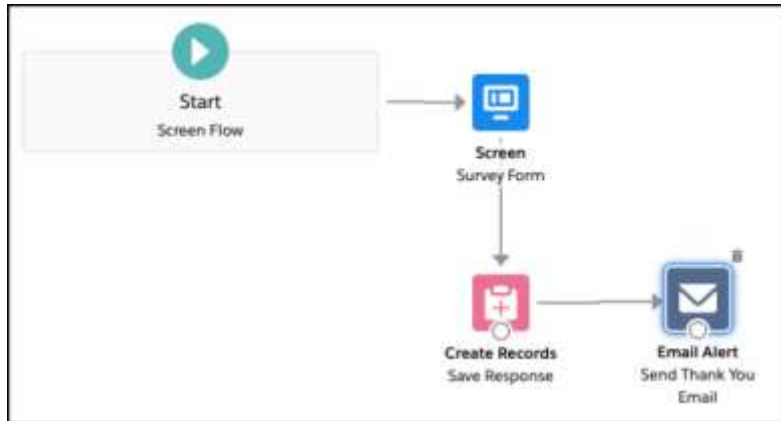
The next step is to call the **Survey – Thank You Email** email alert from flow so that when flow fires it triggers the thank you email to survey participants.

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**.



The screenshot shows the configuration interface for an email alert named "Survey - Thank You Email". At the top, it says "Edit 'Survey - Thank You Email' email alert". Below this, a note states: "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." The interface has two main sections: "Label" and "API Name". The "Label" field contains "Send Thank You Email" and the "API Name" field contains "Send_Thank_You_Email". There is a "Description" field which is currently empty. Below these is a "Set Input Values" section. It shows a variable "A_3" of type "Record ID" with a value of "{!Save_Response}" entered in the input field. At the bottom right, there are "Cancel" and "Done" buttons.

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



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

Save as

A New Version

A New Flow

* Flow Label

Survey

* Flow API Name

Survey

Description

Hide Advanced

How to Run the Flow

User or System Context–Depends on How Flow is Launched

* Type

Screen Flow

* API Version for Running the Flow

51

Interview Label

Insert a resource...

Survey {!\$Flow.CurrentDateTime}

Last Modified

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

Status:

Active

Type:

Screen Flow

Version Number:

2

Cancel

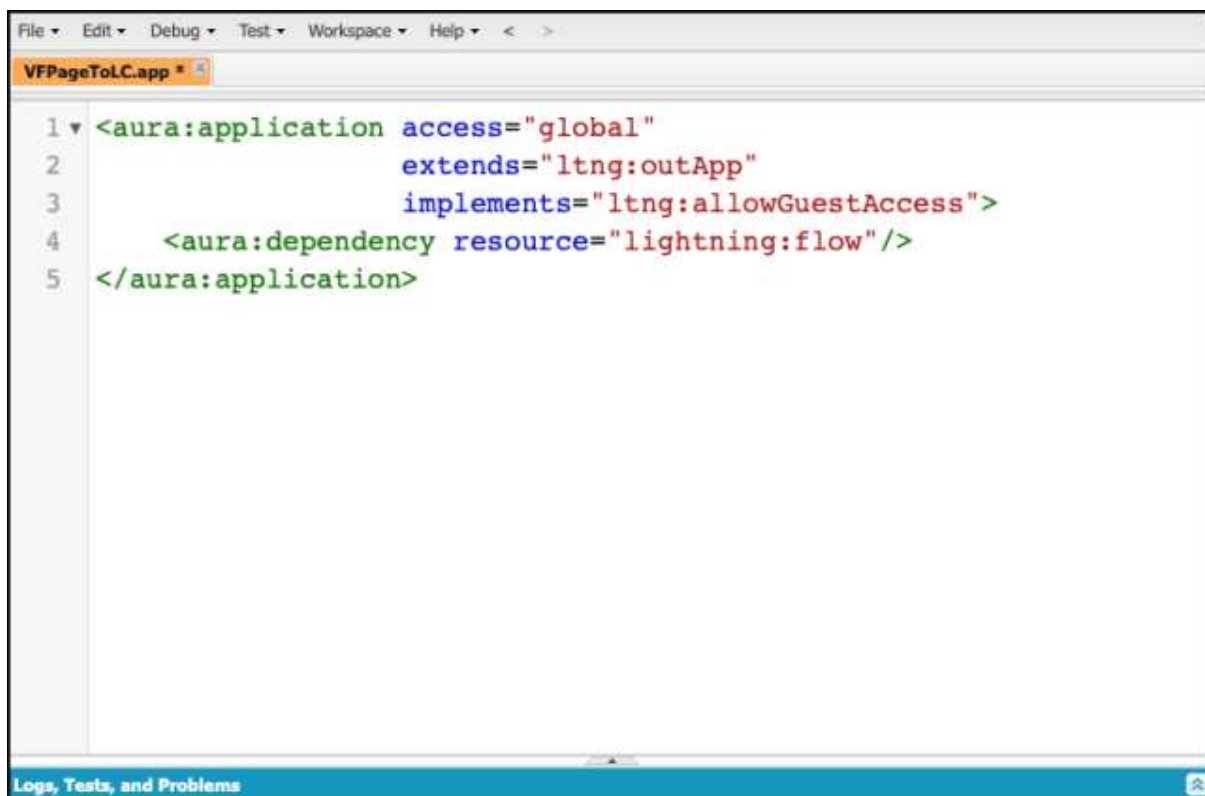
Save

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

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

1. Click Setup | Developer Console

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

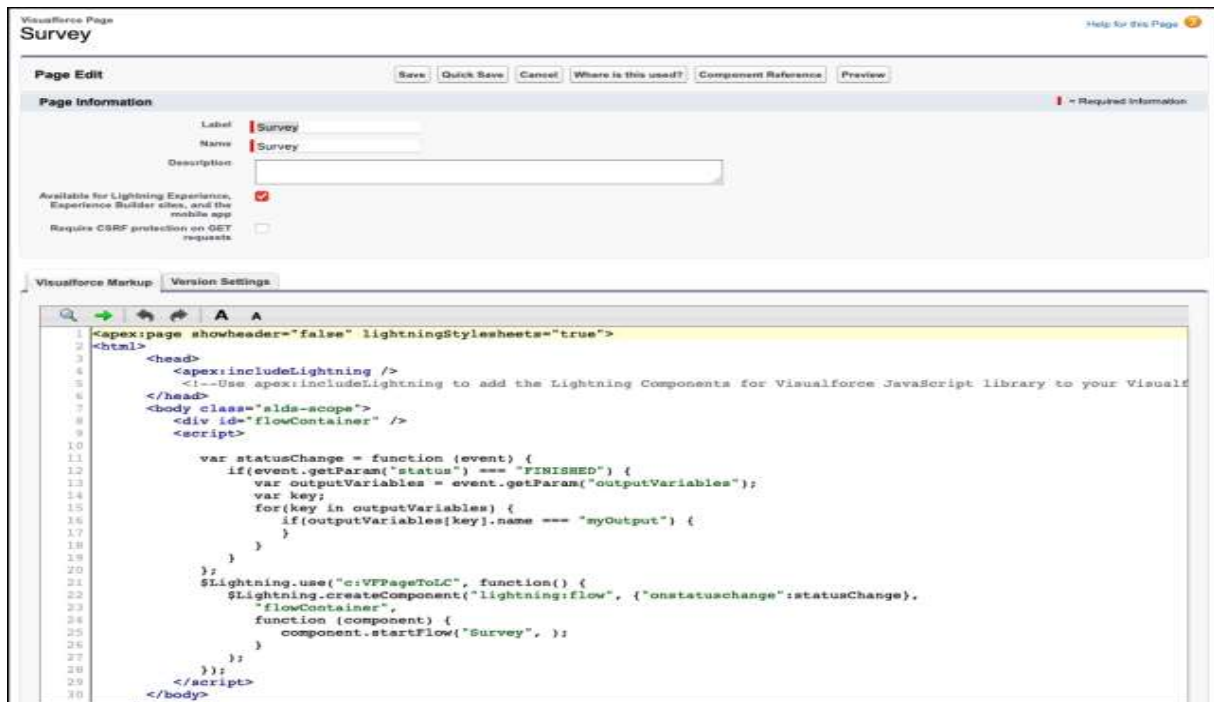
A screenshot of an IDE window titled 'VFPageToLC.app'. The code editor shows five lines of XML code for an Aura application. The code is: 1 <aura:application access="global" 2 extends="ltng:outApp" 3 implements="ltng:allowGuestAccess"> 4 <aura:dependency resource="lightning:flow"/> 5 </aura:application>. The code is color-coded: tags are green, attributes are blue, and values are red. The IDE has a menu bar with File, Edit, Debug, Test, Workspace, and Help. At the bottom, there is a blue bar labeled 'Logs, Tests, and Problems'.

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

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

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

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



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

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

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

Site Edit [Save] [Cancel]

Site Label: Survey [Save]

Site Name: Survey [Save]

Site Description: [Text Area]

Site Contact: Rakesh Gupta [Save]

Default Record Owner: Rakesh Gupta [Save]

Default Web Address: http://kafhar-developer-edison.gus.force.com/ survey [Save]

Active: ☒ [Save]

Active Site Home Page: Survey [Preview]

Inactive Site Home Page: InMaintenance [Preview]

Site Template: SiteTemplate [Save]

Site Robots.txt: [Save]

Site Favorite Icon: [Save]

Analytics Tracking Code: [Save]

URL Rewriter Class: [Save]

Enable Feeds: ☐ [Save]

Clickjack Protection Level: Allow framing by the same origin only (Recommended) [Save]

Require Secure Connections (HTTPS): ☒ [Save]

Lightning Features for Guest Users: ☒ [Save]

Upgrade all requests to HTTPS: ☒ [Save]

Enable Content Sniffing Protection: ☒ [Save]

Enable Browser Cross Site Scripting Protection: ☒ [Save]

Referrer URL Protection: ☒ [Save]

Guest Access to the Payments API: ☐ [Save]

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

Proof of Concept

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

Survey

Name

First Name

Last Name

*Email

*Rating

5

*Comment


Awesome Blog

Next

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

Thank You For Completing Our Survey!

Inbox



Survey Site Guest User [via bj9amq6fe7t-b-cdzwmaa.gs0.bnc.salesforce.com](#)

to me

8:09 PM (1 minute ago)

Hi Alok Sinfal,

Thanks for taking time out to participate in our survey. We are very appreciative of the time you have taken to assist in our analysis, and commit to utilizing the information gained to contemplate and implement worthwhile improvements. We will share these results with you through your State Survey Agency, whom we also thank for their generous participation.

Once again, we are extremely grateful for your contributing your valuable time, your honest information, and your thoughtful suggestions.

Thanks,
Automation Champion

Reply

Forward