

**NAAN MUDHALVAN**

**ASSIGNMENT**

**on**

**[SALESFORCE]**

**CREATION OF AN APPLICATION  
FOR SCHOOL MANAGEMENT**

**NAME – JENISHA J**

**NM ID -**

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**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

Setup

New Custom Object

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. [Tail me now!](#) [Don't show this message again](#)

Custom Object Definition Edit

Save Save & New Cancel

Custom Object Information

Required Information

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

Label

college

Example: Account

Plural Label

colleges

Example: Accounts

Starts with vowel sound?

☐

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

Object Name

college

Example: Account

Description

Context Sensitive Help Setting

☒ Open the standard Salesforce.com help & Training window  
☐ Open a subwindow using a Visualforce page  
☐ None

Context 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

college Name

Example: Account Name

Date Type

Text

Optional Features

☐ Allow Reports  
☐ Allow Activities  
☐ Track Field History  
☐ Allow in Chatter Group  
☐ 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

Save Save & New Cancel

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

**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 custom profiles. [Take me there!](#) [Don't show this message again](#)

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

**Custom Object Information** [Required Information](#)

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

Label:  Example: Account

Plural Label:  Example: Accounts

Start with vowels sound: ☐

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

Object Name:  Example: Account

Description:

Context-Sensitive Help Setting: ☒ Open the standard Salesforce.com help & Training window ☐ Open a window using a Visualforce page

Context Name:

**Enter Record Name Label and Format**

The Record Name appears in page layouts, key tabs, 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:  Example: Account Name

Data Type:

**Optional Features**

- ☐ Allow Reports
- ☐ Allow Activities
- ☐ Track Field History
- ☐ Allow in Chatter Group
- ☐ 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 Streaming
- ☒ Allow Bulk API Access
- ☒ Allow Streaming API Access

**Deployment Status** [What's New?](#)

- ☐ 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


[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.



Search Setup

Setup Home Object Manager

Setup > OBJECT MANAGER

CDepartment

Full Delete

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: CDepartment\_\_c

Custom: ☒

Singular Label: CDepartment

Plural Label: CDepartments


Source Reports

Track Activities

Track Field History

Deployment Status: Deployed

Help Settings: Standard Salesforce.com Help Window



Search Setup

Setup Home Object Manager

Setup > OBJECT MANAGER

CDepartment

Help for this Page

Details

Fields & Relationships

Page Layouts

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New Relationship

Step 3: Enter the label and name for the lookup field

Previous Next Cancel

Field Label: Ecology

Field Name: Ecology

Description:

Key Text:

Child Relationship Name: CDepartments

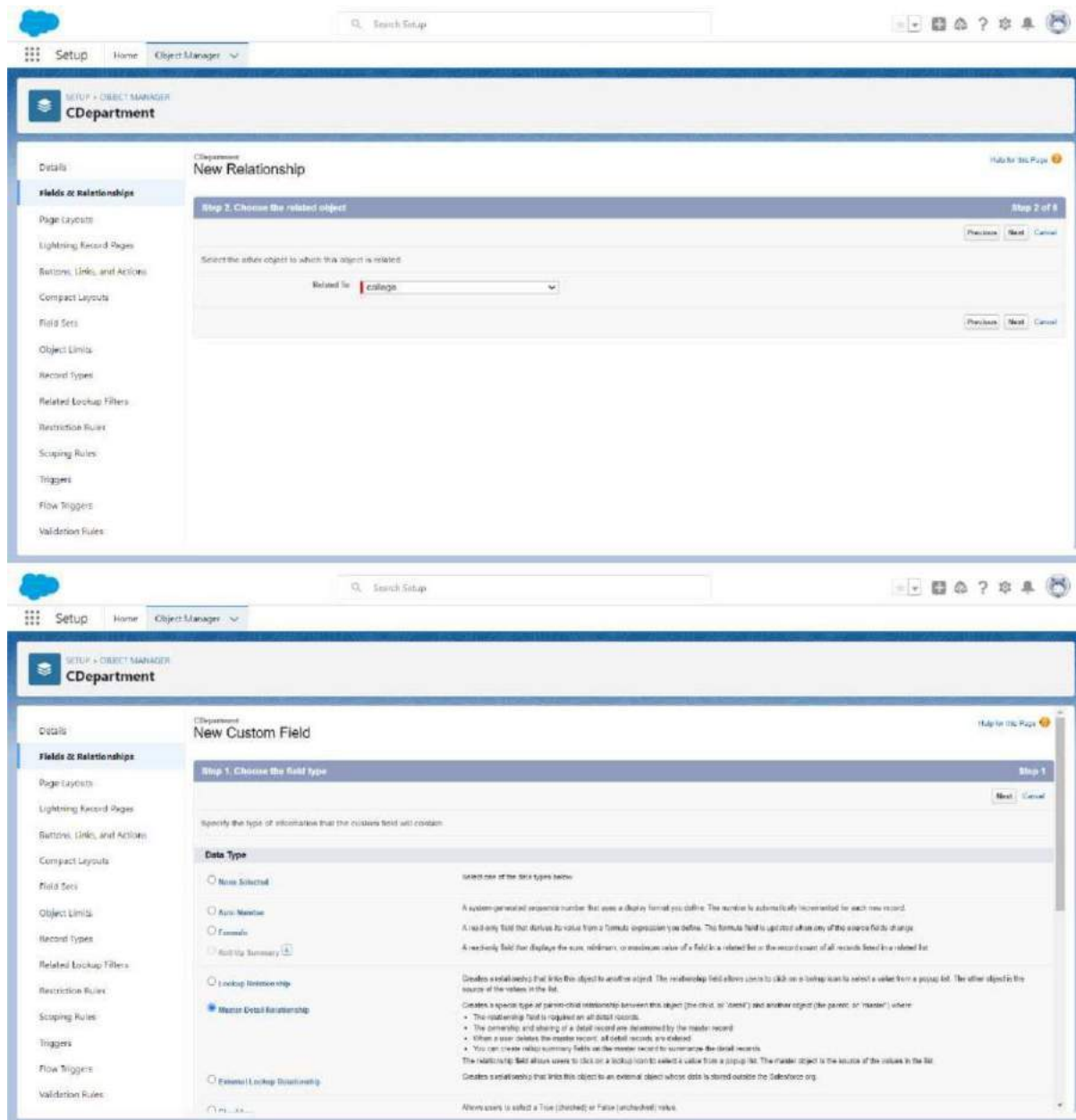
Warning Setting: ☒ Field Only (Allows users with at least Read access to the Master record to create, edit, or delete related Detail records.)

☐ Read/Write (Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.)

☐ Child records can be reparented to other parent records after they are created

☒ Add this field to existing custom report types that contain this entity

Lookup Filter

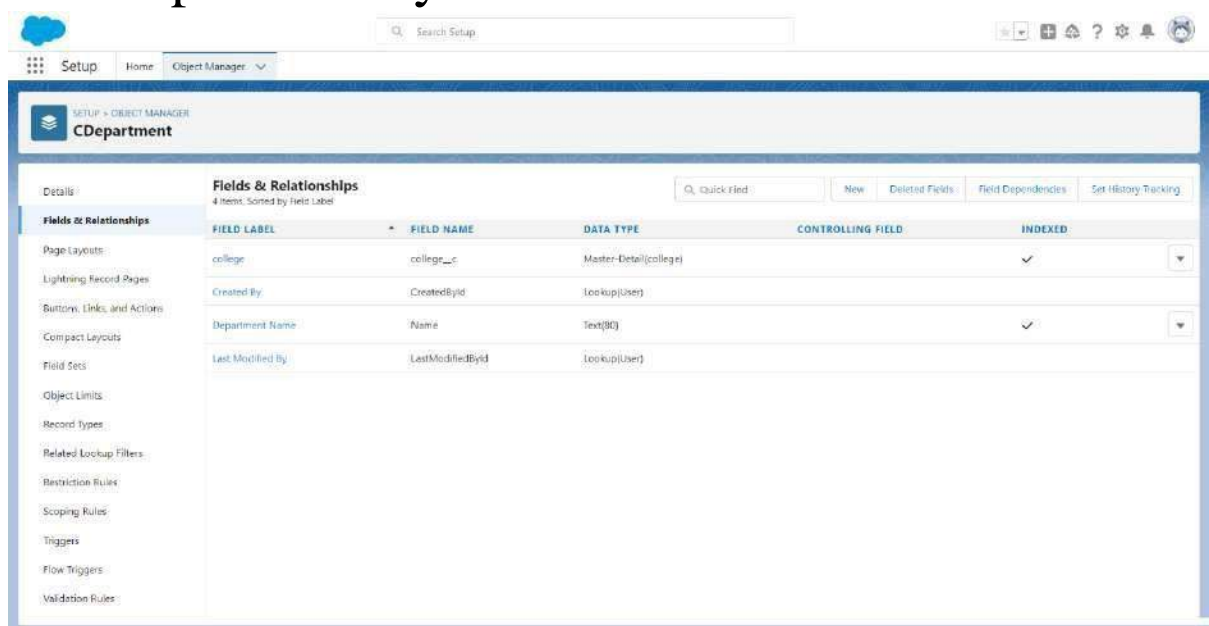


## Step 3: Create the Roll-Up Summary Field

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

Search Setup

tabs

User Interface

Relate Tabs and Labels

tabs

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

Setup

Tabs

Custom Tabs

Help for this Page

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.

Custom Object Tabs

New

What is This?

Action	Label	Tab Style	Description
<a href="#">Edit</a>	<a href="#">New</a>	<a href="#">Book</a>	
<a href="#">Edit</a>	<a href="#">Research Expense</a>	<a href="#">Custom</a>	
<a href="#">Edit</a>	<a href="#">Student</a>	<a href="#">New</a>	

Web Tabs

New

What is This?

No Web Tabs have been defined.

Visualforce Tabs

New

What is This?

No Visualforce Tabs have been defined.

Lightning Component Tabs

New

What is This?

No Lightning component tabs have been defined.

Lightning Page Tabs

New

What is This?

No Lightning Page Tabs have been defined.

Setup

Home

Object Manager

Search Setup

college

Fields of Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

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Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

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Validation Rules

college

Details

New Custom Field

Help for this Page

Step 6: Add to page layouts

Field Label

Total count

Field Type

Record 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

college Layout

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

Previous

Save & New

Save

Cancel

college

SetupHomeObject Manager

college

Details

Fields or Relationships

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Validation Rules

New Custom Field

Help for this Page

Step 4 of 5

Step 4. Establish field-level security

Field LabelTotal count

Data TypeRoll-up Summary

Field NameTotal count

Description

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

Field-Level Security for Profile	<input type="checkbox"/> Visible	<input type="checkbox"/> Read-Only
Analyst/Cloud Integration User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Analyst/Cloud Security User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cloud Kiosk Admin	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contact Manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cloud Org Data Proxy User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
customer	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Finance Admin: Asset Relationship Filter	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

college

SetupHomeObject Manager

college

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Help for this Page

Step 3 of 5

Step 3. Define the summary calculation

Select Object to Summarize

Master Objectcollege

Summary ObjectCCDepartments

Select Roll-Up Type

☒ COUNT

☐ SUM

☐ MIN

☐ MAX

Field to Aggregate

Filter Criteria

☒ All records should be included in the calculation

☐ Only records meeting certain criteria should be included in the calculation

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Validation Rules

college

New Custom Field

Help for this Page

Step 2: Enter the details

Step 2 of 5

Previous

Next

Cancel

Field Label

Total count

Field Name

Total\_count

Description

Help Text

☐ Auto add to custom report type
 ☒ Add this field to existing custom report types that contain this entity

Previous

Next

Cancel

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New Custom Field

Help for this Page

Step 1: Choose the field type

Step 1

Next

Cancel

Specify the type of information that the custom field will contain.

Data Type

☐ None Selected
 

Select one of the data types below

☐ Auto Number
 

A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

☐ Formula
 

A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

☒ Roll Up Summary
 

A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

☐ Lookup Relationship
 

Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

☐ Master Detail Relationship
 

Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master"), where:
 

- The relationship field is required on all detail records.
- The relationship and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create roll-up summary fields on the master record to summarize the detail records.

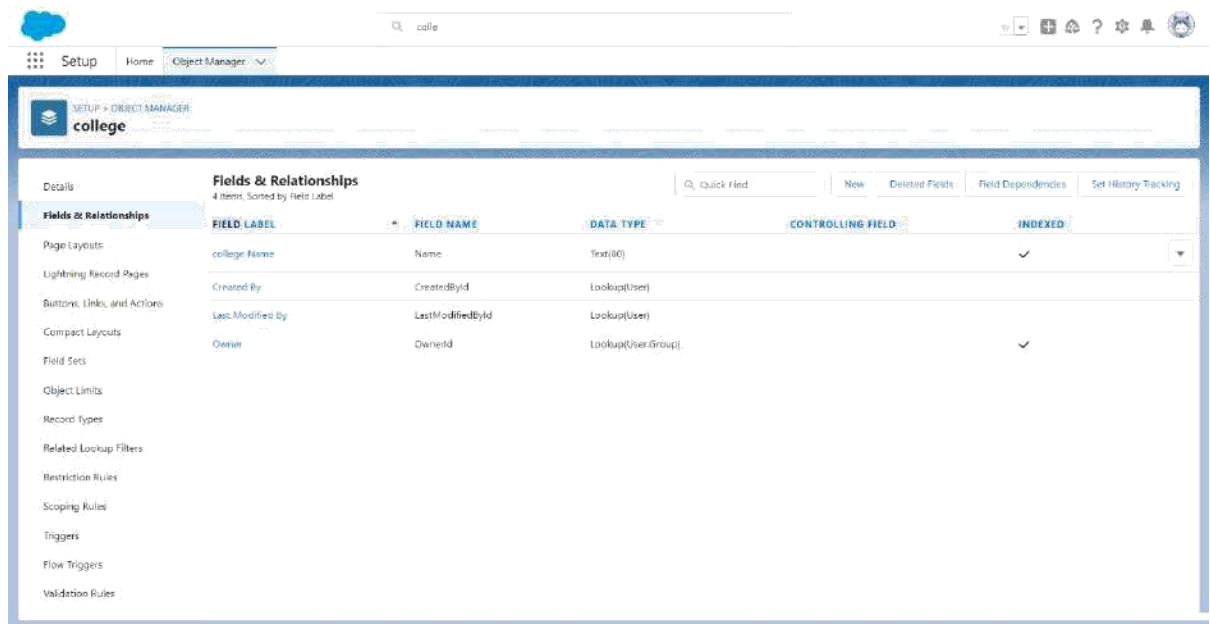
 The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

☐ External Lookup Relationship
 

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

☐ Pick List
 

Allows users to select a True (checked) or False (unchecked) value.



## 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 displays the Salesforce Setup interface for configuring a new custom object tab. The left sidebar shows the navigation menu with 'Setup' selected. The main content area is titled 'New Custom Object Tab' and is currently on 'Step 2: Add to Profiles'.

At the top of the main area, there is a search bar and a 'Help for this Page' link. Below the title, there are two radio button options for tab visibility:

- ☒ Apply one tab visibility to all profiles (Default On)
- ☐ Apply a different tab visibility for each profile

Below these options is a table with two columns: 'Profile' and 'Tab Visibility'. The table lists various user profiles and their corresponding tab visibility settings, all of which are currently set to 'Default On'.

Profile	Tab Visibility
Analytics Cloud Integration User	Default On
Analytics Cloud Security User	Default On
Authenticated Website	Default On
Authenticated Website	Default On
Cloud Kicks Admin	Default On
Contract Manager	Default On
Cross Org Data Proxy User	Default On
Custom Marketing Profile	Default On
Custom Sales Profile	Default On
Custom 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 Portal Manager Custom	Default On
Customer Portal Manager Standard	Default On
External Apps Login User	Default On
External Identity User	Default On
Force.com - App Subscription User	Default On
Force.com - Free User	Default On
Gold 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 Users	Default On
Salesforce API only system integrations	Default On
Sales User	Default On
security profile	Default On
silver partner user	Default On
Solution Manager	Default On
Standard Platform User	Default On
standard user	Default On
System Administrator	Default On

At the bottom right of the page, there are three buttons: 'Previous', 'Next', and 'Cancel'.

**Solution:**

The screenshot displays the Salesforce Setup interface. The left sidebar contains navigation links: Setup, Home, Object Manager, ADMINISTRATION, Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and Users. The main content area is titled 'Profiles' and shows a list of profiles. The table has columns for Action, Profile Name, and User License. The profiles listed include Analytics Cloud Integration User, Analytics Cloud Security User, Authenticated Website, Authenticated Website, Chatter External User, Chatter Free User, Chatter Moderator User, Contract Manager, Cook's On Data Proxy User, Custom Marketing Profile, Custom Sales Profile, Custom Support Profile, Customer Community Login User, Customer Community Plus Login User, Customer Community Plus User, Customer Community User, and Customer Portal Manager Custom. The 'User License' column shows the license assigned to each profile, such as 'Analytics Cloud Integration User', 'Authenticated Website', 'Chatter External', 'Chatter Free', 'Chatter Moderator', 'Contract Manager', 'Cook's On Data Proxy User', 'Salesforce', 'Salesforce', 'Salesforce', 'Customer Community Login', 'Customer Community Plus Login', 'Customer Community Plus', 'Customer Community', and 'Customer Portal Manager Custom'. The 'Profiles' page title is visible at the top of the main content area.

Setup Home Service Setup Assistant Multi-Factor Authentication Assistant Hyperforce Assistant Release Updates Lightning Experience Transition Assistant Salesforce Mobile App Lightning Usage Optimizer ADMINISTRATION Users Permission Set Groups Permission Sets Profiles Public Groups Quizzes Roles User Management Settings Users

### Profiles

1-7 of 7 0 Selected

Action	Profile Name	User License	Contents
<input type="checkbox"/>	Clone - Salesforce API Only System Integrations	Salesforce Integration	
<input type="checkbox"/>	Clone - Standard User	Salesforce	
<input type="checkbox"/>	Clone - Sales Console User	Sales Console	
<input type="checkbox"/>	Clone - Student Manager	Salesforce	
<input type="checkbox"/>	Clone - Standard Platform User	Standard Platform	
<input type="checkbox"/>	Clone - Standard User	Salesforce	
<input type="checkbox"/>	Clone - System Administrator	Salesforce	

Setup Home Service Setup Assistant Multi-Factor Authentication Assistant Hyperforce Assistant Release Updates Lightning Experience Transition Assistant Salesforce Mobile App Lightning Usage Optimizer ADMINISTRATION Users Permission Set Groups Permission Sets Profiles Public Groups Quizzes Roles User Management Settings Users

### Clone Profile

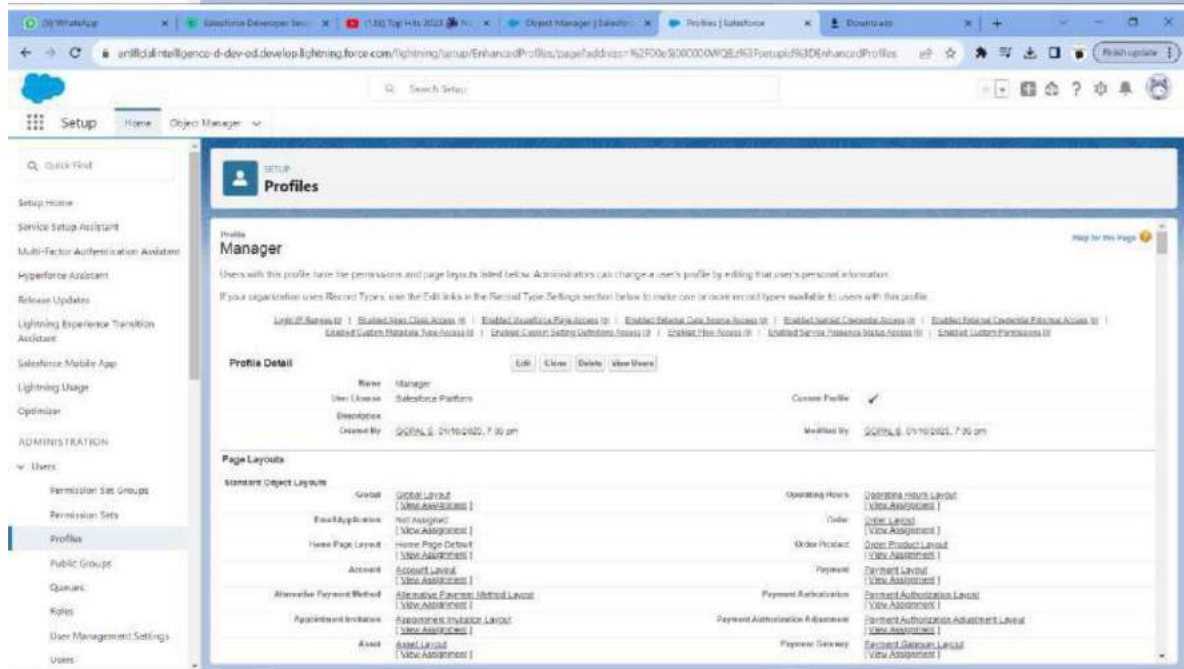
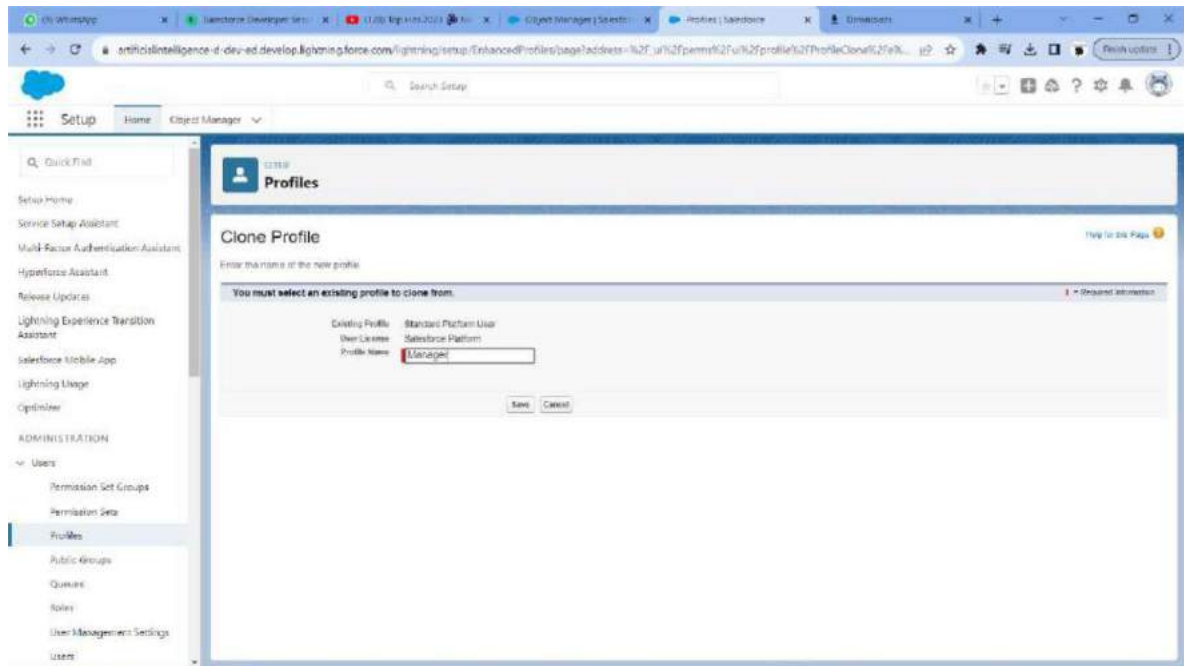
Enter the name of the new profile.

You must select an existing profile to clone from.

Existing Profile	User License	Profile Name
Standard Platform User	Standard Platform	

Save Cancel







Setup Home Service Setup Assistant Multi-Factor Authentication Assistant Hyperforce Assistant Release Updates Lightning Experience Transition Assistant Salesforce Mobile App Lightning Usage Optimizer

ADMINISTRATION

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

### Profiles

Manager

Get the permissions and page layouts for this profile

**Profile Edit**

Name: Manager

User License: Salesforce Platform

Description:

Custom Profile: ☒

**Custom App Settings**

	Visible	Default
Analytics Studio (standard__analytics)	<input type="checkbox"/>	<input type="radio"/>
App Launcher (standard__AppLauncher)	<input type="checkbox"/>	<input type="radio"/>
Mail (Mail)	<input checked="" type="checkbox"/>	<input type="radio"/>
Platform (standard__Platform)	<input type="checkbox"/>	<input checked="" type="radio"/>
WC (standard__Work)	<input type="checkbox"/>	<input type="radio"/>

**Service Provider Access**

**Tab Settings**

☐ Override users' personal tab customizations

Standard Tab Settings

	Visible	Default On
Accounts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Alert Settings	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Learning	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Libraries	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Lightning Bulk Solutions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Other (Other)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

### Profiles

Communication Subscription Channel Types

	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication Subscription Channel Types	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication Subscription Consents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication Subscription Throttles	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contacts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Addresses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Consents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Emails	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Custom Object Permissions**

	Basic Access				Data Administration		
	Read	Create	Edit	Delete	View All	Modify All	
Batch	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Locations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

**Session Settings**

Session Timeout (in hours): 2 hours of inactivity

Session Security Level (logged out): None

**Password Policies**

How passwords expire in: 60 days

Enforce password history: 3 passwords remembered

Minimum password length: 8

Salesforce Developer Tools

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=762F06e500000000WQBch2Fv%3FvetURL%3D%252F06e50...

Setup

Profiles

Custom Object Permissions

	Basic Access					Data Administration	
	Read	Create	Edit	Delete	View All	Modify All	
Blank	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Customers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: --None--

Password Policies

User passwords expire in: 90 days

Enforce password history: 3 passwords remembered

Minimum password length: 8

Password complexity requirement: Must include alpha and numeric characters

Password question requirement: Cannot contain password

Maximum failed login attempts: 10

Lockout after too many failed login attempts: 15 minutes

Salesforce Developer Tools

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=762F06e500000000WQBch2Fv%3FvetURL%3D%252F06e50...

Setup

Profiles

Custom Object Permissions

	Basic Access					Data Administration	
	Read	Create	Edit	Delete	View All	Modify All	
Blank	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Customers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: --None--

Password Policies

User passwords expire in: 90 days

Enforce password history: 3 passwords remembered

Minimum password length: 8

Password complexity requirement: Must include alpha and numeric characters

Password question requirement: Cannot contain password

Maximum failed login attempts: 10

Lockout after too many failed login attempts: 15 minutes

Obscure secret answers for password hints: ☐

Require a minimum 1 day cooldown between password resets: ☐

Don't immediately email users to report password resets: ☐










artificialintelligence-d-dev-ed.develop.my.salesforce.com / ui/system/security/ChangePassword?urlUFI=%2Fhome%2Fhome.jsp&fromFrontdoor=1&setupId=Ch...



### Change Your Password

Enter a new password for **2x21n@kilotac.in**. Make sure to include at least:

- 8 characters
- 1 letter
- 1 number

\* New Password:

Copy

\* Confirm New Password:

Mask

Security Question


\* Answer:

**Change Password**

Password was last changed on 02/20/2023, 7:22 pm

login | Salesforce

artificialintelligence-d-dev-ed.develop.my.salesforce.com



Username:

Password:

**Log In**


☐ Remember me

[Forgot Your Password?](#)

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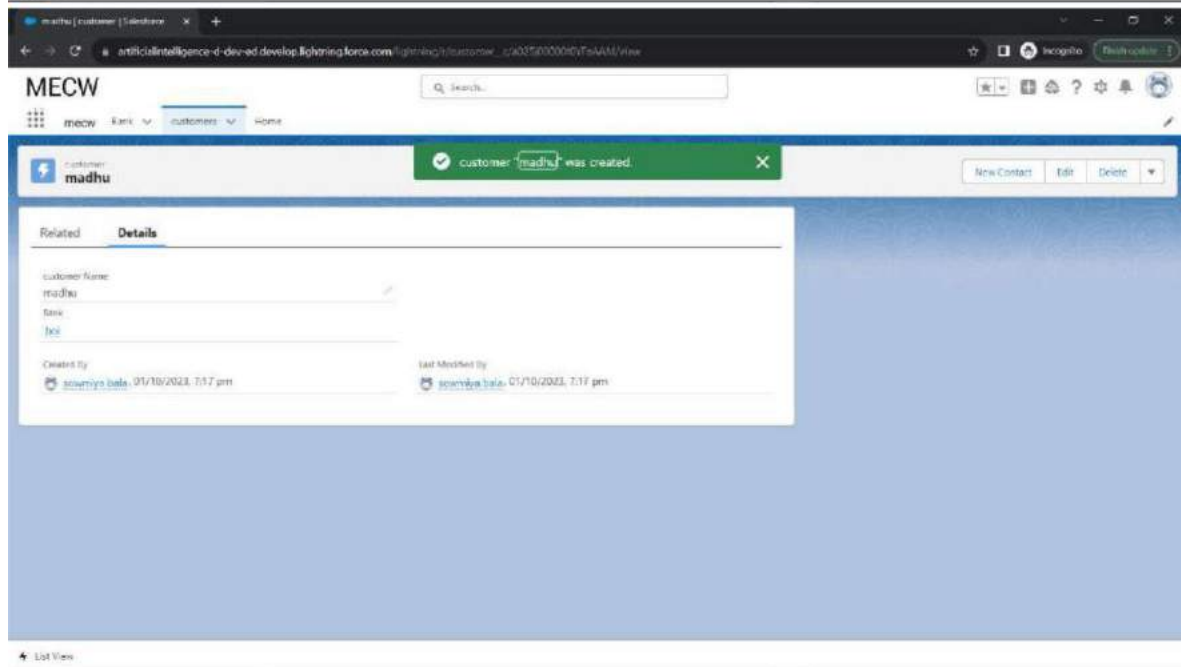
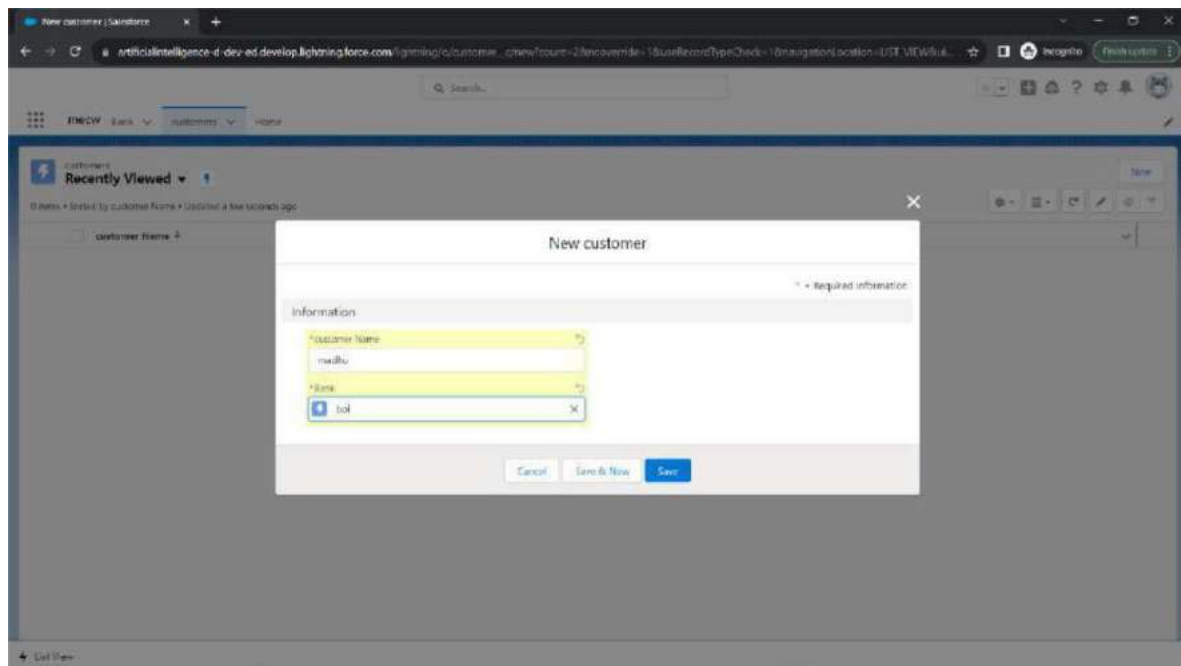
## Join us for the future of trusted enterprise AI, streaming on Salesforce+.

**WATCH ON DEMAND**



# AI Day







artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/home

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Hyperforce Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

ADMINISTRATION

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

### Profiles

All Profiles | Edit | Details | Create New View

Action	Profile Name	User License	Custom
<input type="checkbox"/>	Clone - Salesforce API Only System Integrations	Salesforce Integration	
<input type="checkbox"/>	Clone - Standard User	Salesforce	
<input type="checkbox"/>	Clone - Sales Console User	Salesforce	
<input type="checkbox"/>	Clone - Student Manager	Salesforce	
<input type="checkbox"/>	Clone - Standard Platform User	Salesforce Platform	
<input type="checkbox"/>	Clone - Standard User	Salesforce	
<input type="checkbox"/>	Clone - System Administrator	Salesforce	

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F\_ui%2Fperm%2Fu%2Fprofile%2FprofileClone%2F...

Setup Home

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User Management Settings

Users

### Clone Profile

Enter the name of the new profile

You must select an existing profile to clone from.

Existing Profile	User License	Profile Name
Standard Platform User	Salesforce Platform	<input type="text" value="SalesManager"/>

Save Cancel



Salesforce Developer Edition 2.0 | Profiles | Salesforce

Search Setup

Setup Home | Service Setup Assistant | Multi-Factor Authentication Assistant | Hyperforce Assistant | Release Updates | Lightning Experience Transition Assistant | Salesforce Mobile App | Lightning Usage | Optimizer

ADMINISTRATION

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- Users

### Profiles

Custom Object Permissions

	Basic Access					Data Administration		Record Access					Data Administration	
	Read	Create	Edit	Delete	View All	Modify All	Read	Create	Edit	Delete	View All	Modify All		
Back	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>					<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Customers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>					<input type="checkbox"/>	<input type="checkbox"/>		

Enhancement Requests

Session Settings

Session Timeout After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

User passwords expire in: 90 days

Enforce password history: 3 passwords remembered

Minimum password length: 8

Password complexity requirement: Must include alpha and numeric characters

Password question requirement: Cannot contain password

Maximum failed login attempts: 10

Lockout effective period: 15 minutes

Observe secret answers for password resets: ☐

Require a minimum 1 day password lifetime: ☐

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

Salesforce Developer Edition 2.0 | Profiles | Salesforce

Search Setup

Setup Home | Service Setup Assistant | Multi-Factor Authentication Assistant | Hyperforce Assistant | Release Updates | Lightning Experience Transition Assistant | Salesforce Mobile App | Lightning Usage | Optimizer

ADMINISTRATION

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- Users

### Profiles

Custom Object Permissions

	Basic Access					Data Administration		Record Access					Data Administration	
	Read	Create	Edit	Delete	View All	Modify All	Read	Create	Edit	Delete	View All	Modify All		
Back	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>					<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Customers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>					<input type="checkbox"/>	<input type="checkbox"/>		

Enhancement Requests

Session Settings

Session Timeout After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

User passwords expire in: 90 days

Enforce password history: 3 passwords remembered

Minimum password length: 8

Password complexity requirement: Must include alpha and numeric characters

Password question requirement: Cannot contain password

Maximum failed login attempts: 10

Lockout effective period: 15 minutes

Observe secret answers for password resets: ☐

Require a minimum 1 day password lifetime: ☐

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

Save | Save & New | Cancel

Setup Home Object Manager

Search Setup

Users

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

New User

User Edit Save Save & New Cancel

General Information

First Name  
Last Name  
Alias  
Email  
Username  
Nickname  
Title  
Company  
Department  
Division

Role  
User License  
Profile  
Active  
Marketing User  
Offline User  
Knowledge User  
Flow User  
Service Cloud User  
Site.com Contributor User  
Site.com Publisher User  
VIOC User  
Custom User Type  
Custom Monthly Addition Limit  
Accessibility Mode (Default Only)  
High Contrast Colors on Charts  
Load Lightning Pages While Scrolling  
Debug Mode

Role: <None Specified>  
User License: Salesforce Integration  
Profile: Salesforce API Only System Integrations  
Active: ☒  
Marketing User: ☐  
Offline User: ☐  
Knowledge User: ☐  
Flow User: ☐  
Service Cloud User: ☐  
Site.com Contributor User: ☐  
Site.com Publisher User: ☐  
VIOC User: ☐  
Custom User Type: --None--  
Custom Monthly Addition Limit: Default Limit (2000)  
Accessibility Mode (Default Only): ☐  
High Contrast Colors on Charts: ☐  
Load Lightning Pages While Scrolling: ☒  
Debug Mode: ☐

Setup Home Object Manager

Search Setup

Users

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

New User

User Edit Save Save & New Cancel

General Information

First Name  
Last Name  
Alias  
Email  
Username  
Nickname  
Title  
Company  
Department  
Division

Role  
User License  
Profile  
Active  
Marketing User  
Offline User  
Knowledge User  
Flow User  
Service Cloud User  
Site.com Contributor User  
Site.com Publisher User  
VIOC User  
Custom User Type  
Custom Monthly Addition Limit  
Accessibility Mode (Default Only)  
High Contrast Colors on Charts  
Load Lightning Pages While Scrolling  
Debug Mode

First Name: mackay  
Last Name: B  
Alias: mb  
Email: 2620cae175@adec.in  
Username: 2620cae175@adec.in  
Nickname: User18961864242654102  
Title: worker  
Company: Kof BofR  
Department: Sales  
Division:

Role: <None Specified>  
User License: Salesforce Platform  
Profile: Custom Storage  
Active: ☒  
Marketing User: ☐  
Offline User: ☐  
Knowledge User: ☐  
Flow User: ☐  
Service Cloud User: ☐  
Site.com Contributor User: ☐  
Site.com Publisher User: ☐  
VIOC User: ☐  
Custom User Type: --None--  
Custom Monthly Addition Limit: Default Limit (2000)  
Accessibility Mode (Default Only): ☐  
High Contrast Colors on Charts: ☐  
Load Lightning Pages While Scrolling: ☒  
Debug Mode: ☐

Setup Home Object Manager

Search Setup

Users

Permission Set Groups  
Permission Sets  
Profiles  
Public Groups  
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User Management Settings  
Users

Feature Settings  
Datacom  
Prospector Users  
Service  
Embedded Service  
Messaging for In-App and Web User Verification  
User Interface  
Action Link Templates  
Actions & Recommendations  
App Menu

### Users

**Mailing Address**

Street  
City  
Zip/Postal Code  
State/Province  
Country

**Single Sign On Information**

Federation ID

**Locale Settings**

Time Zone (GMT+05:30) India (Standard Time (Asia/Kolkata))  
Locale English (India)  
Language English

**Approver Settings**

Delegated Approver  
Manager  
Resolves Approval Request Details Only if I am an approver

☒ Generate new password and notify user immediately

Save Save & New Cancel

Setup Home Object Manager

Search Setup

Users

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

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Prospector Users  
Service  
Embedded Service  
Messaging for In-App and Web User Verification  
User Interface  
Action Link Templates  
Actions & Recommendations  
App Menu

### Users

**Mailing Address**

Street 4134, aryanpallyam, chennai-600025  
City SALEM  
Zip/Postal Code 636008  
State/Province TAMIL NADU  
Country

**Single Sign On Information**

Federation ID

**Locale Settings**

Time Zone (GMT+05:30) India (Standard Time (Asia/Kolkata))  
Locale English (India)  
Language English

**Approver Settings**

Delegated Approver  
Manager  
Resolves Approval Request Details Only if I am an approver

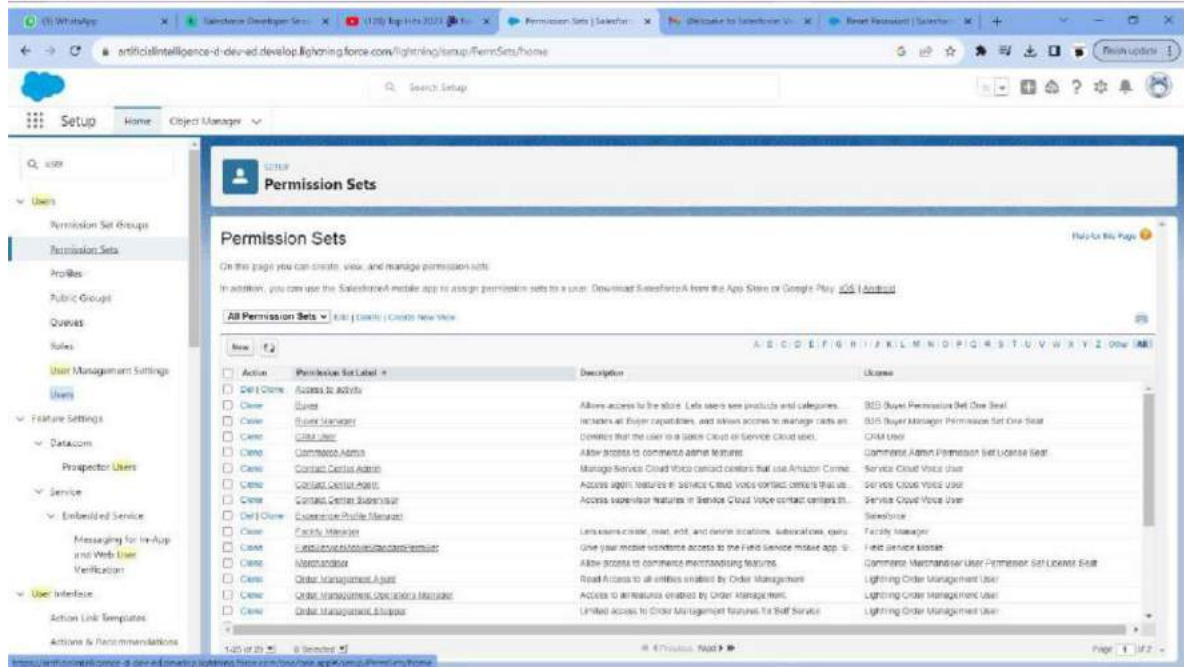
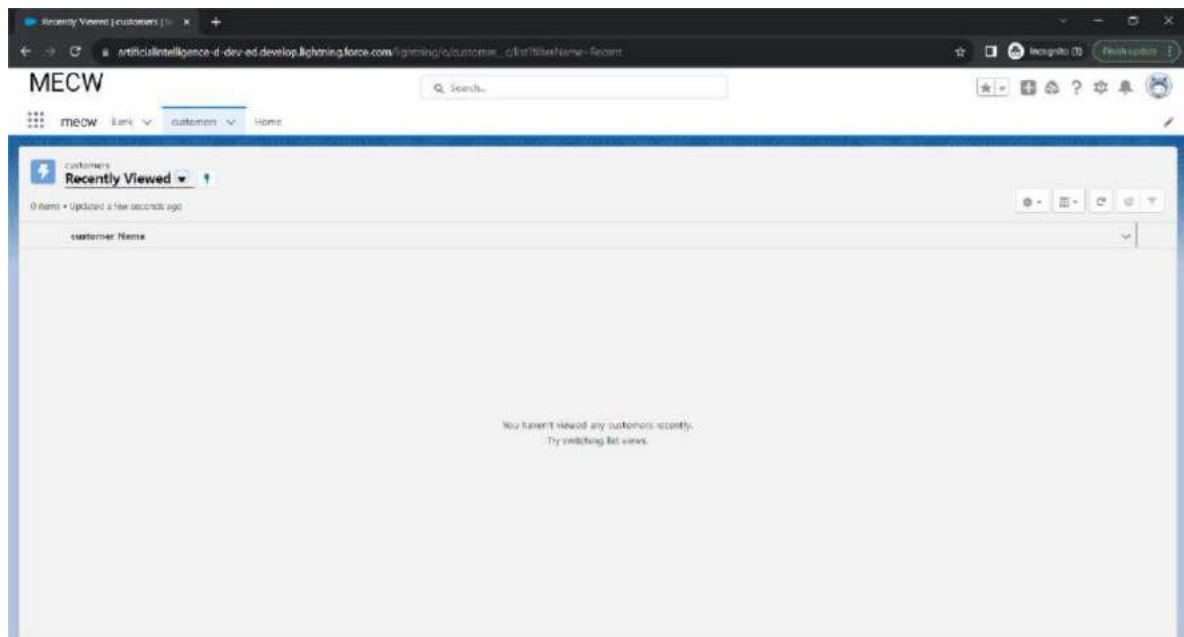
☒ Generate new password and notify user immediately

Save Save & New Cancel











## 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:

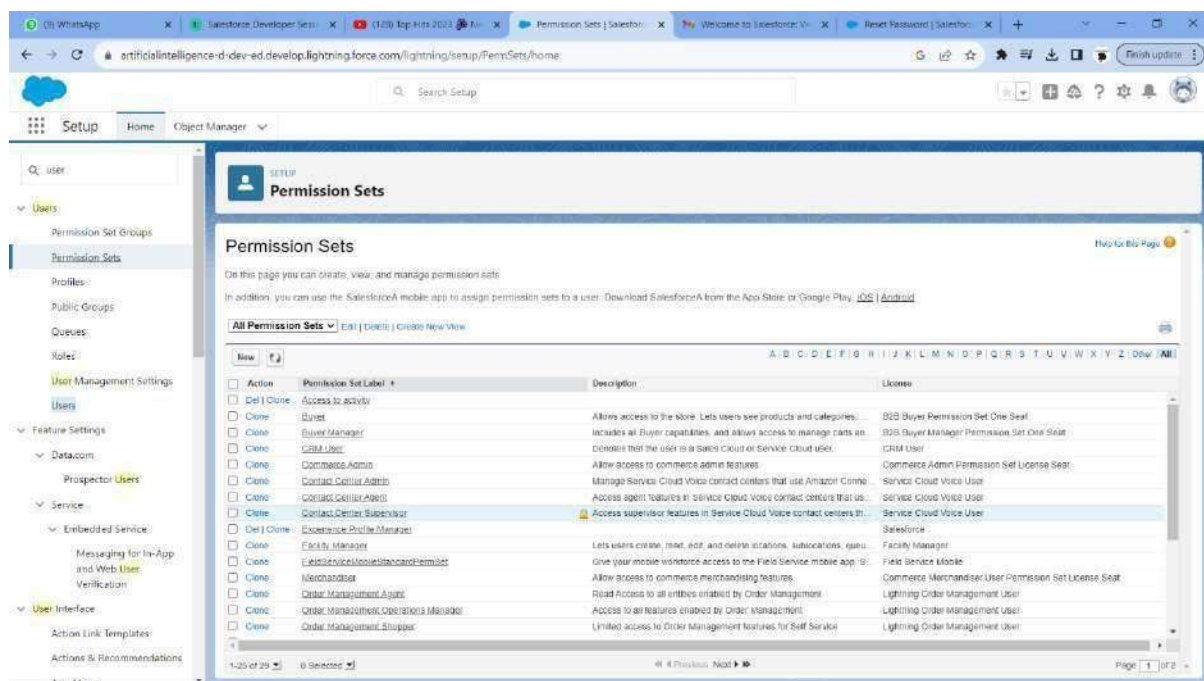
- Ensure that the Account records are owned by the respective users, with User A owning their records and User B owning their records.

## 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

Q: user

- Users
  - Permission Set Groups
  - Permission Sets
  - Profiles
  - Public Groups
  - Queues
  - Roles
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  - Prospector Users
  - Service
    - Embedded Service
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  - Actions & Recommendations
  - App Menu

### Permission Sets

Permission Set: **salesmanager**

Find Settings: [ ] Clone Delete Edit Properties Manage Assignments

**Permission Set Overview**

Description	API Name
License	salesmanager
Session Activation Required	None
Last Modified By	GD2SLJ 8/1/2023 7:29 pm

**Apps**

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

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

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

**App Permissions**  
Permissions to perform app-specific actions, such as "Manage Car Company".

**App Class Access**  
Permissions to execute Apex classes.

**Visualforce Page Access**  
Permissions to execute Visualforce pages.

**External Data Source Access**  
Permissions to authenticate against external data sources.

**Link Access**  
Permissions to execute Flows.

Setup Home Object Manager

Q: user

- Users
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  - App Menu

### Permission Sets

Permission Set: **salesmanager**

Find Settings: [ ] Clone Delete Edit Properties Manage Assignments

Permission Set Overview Object Settings

**Object Settings**

Object Name	Object Permissions	Total Fields	Tab Settings
Accounts	No Access	40	—
Account Relationships	No Access	—	—
Account Insights	No Access	—	—
Accounting Personalized	No Access	27	—
API Access to Object Settings	No Access	14	—
Assessment Data User - Readable	No Access	—	—
Assignment User Assignments	No Access	—	—
Appointment Categories	No Access	9	—
Appointment Subtasks	No Access	17	—
Appointment Subtasks	—	6	—
Appointment Schedule Assignments	No Access	—	—
Appointment Schedule Logs	No Access	—	—
Appointment User Time Slots	No Access	6	—
Asset Accounts	No Access	30	—
Asset Action Sources	No Access	10	—
Asset Recommendations	—	10	—
Assets	No Access	40	—
Asset State Groups	No Access	91	—

Setup Home Object Manager

Q: user

- Users
  - Permission Set Groups
  - Permission Sets**
  - Profiles
  - Public Groups
  - Queues
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Permission Set: salesmanager

Find Settings Clone Delete Edit Properties Manage Assignments

Permission Set Overview Object Settings Blank Edit

Blank

Tab Settings

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

Object Permissions

Permission Name	Enabled
Read	<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
Owner 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

Q: user

- Users
  - Permission Set Groups
  - Permission Sets**
  - Profiles
  - Public Groups
  - Queues
  - Roles
  - User Management Settings
    - Users**
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  - Datacoms
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      - Messaging for In-App and Web User Verification
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    - Action Link Templates
    - Actions & Recommendations

Permission Set: salesmanager

Find Settings Clone Delete Edit Properties Manage Assignments

Permission Set Overview Object Settings Blank Edit

Blank

Tab Settings

Available	Visible
<input type="checkbox"/>	<input 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
Owner Name	<input type="checkbox"/>	<input type="checkbox"/>
Created By	<input type="checkbox"/>	<input type="checkbox"/>
Last Modified By	<input type="checkbox"/>	<input type="checkbox"/>





26 WhatsApp | Salesforce Developer Site | (120) Top Web 2023 | Permission Set | Welcome to Salesforce | Reset Password | Salesforce | Finish Update

artificialintelligence-d-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/000008Pbo-k/PermissionSetAssignments/new

Setup Home Object Manager

user

Users

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### Select an Expiration Option For Assigned Users

No expiration date

Specify the expiration date

1 Day 1 Week All Days 90 Days Custom Date

Time Zone

Select a time zone...

#### Selected Users

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

Cancel Back Assign

26 WhatsApp | Salesforce Developer Site | (120) Top Web 2023 | Permission Set | Welcome to Salesforce | Reset Password | Salesforce | Finish Update

artificialintelligence-d-dev-ed.develop.lightning.force.com/one/one.ssokey@h21wb258nRZVWYOLZDR1cFbwh0TGZwb0y0VbWZCtppac2FSZDX1Yb-1HQVWollw... | Finish Update

Setup Home Object Manager

user

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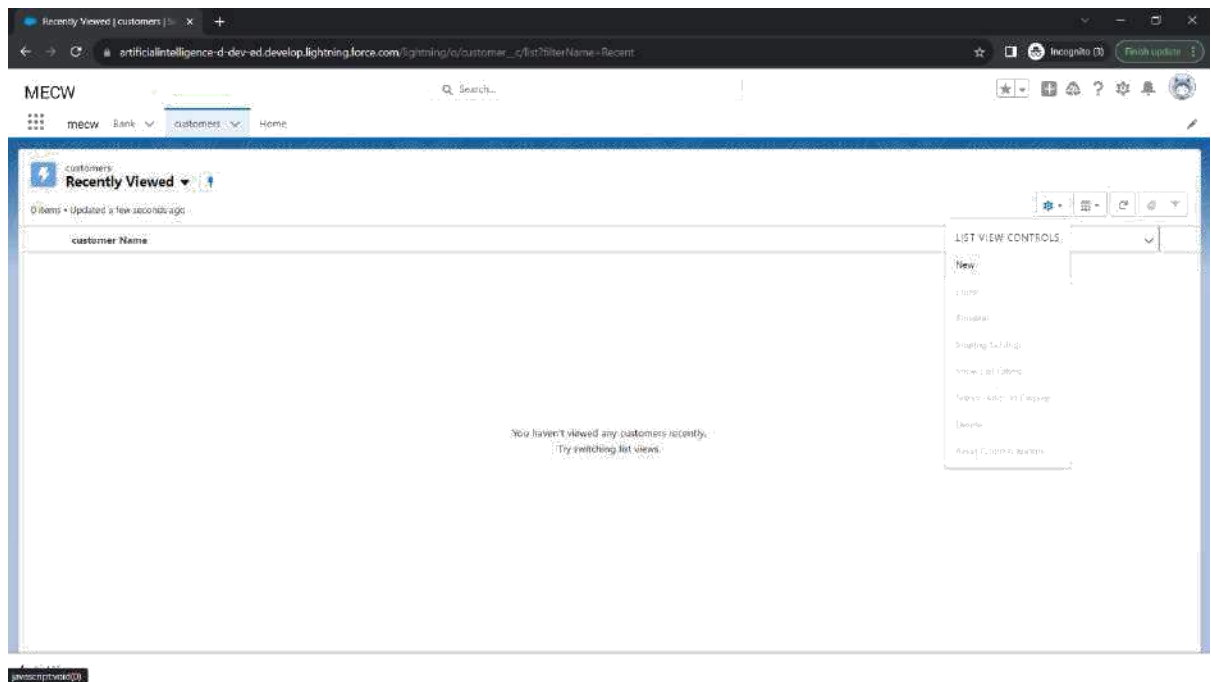
App Menu

PERMISSION SET SALESMANAGER 1 assignments were successful

### Assignment Summary

Full Name	User License	Expires On	Time Zone	Status
madhu b	Salesforce Platform			✓ SUCCESS

Done



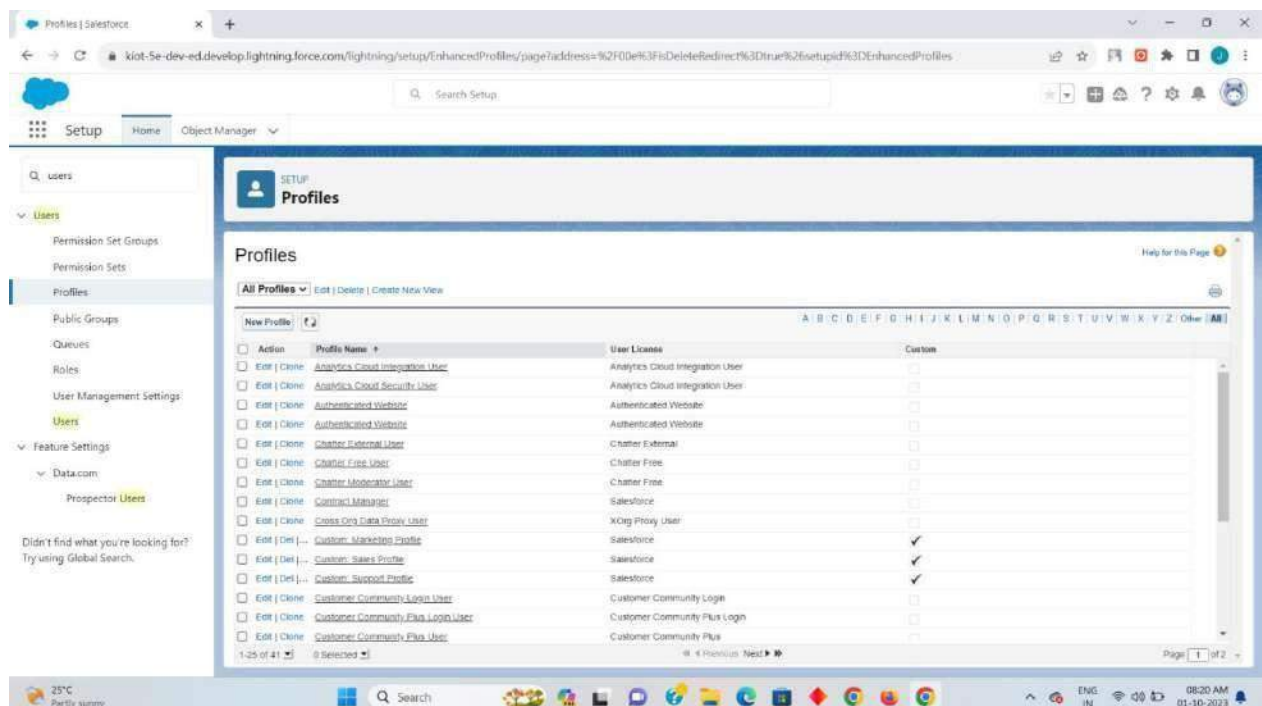


**3. . Suppose there are 2 Users and they are having Create, Read, Edit access on Account Object with the same profile but we want to open up the access for one user to delete how will you implement the Security setting.**

**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]

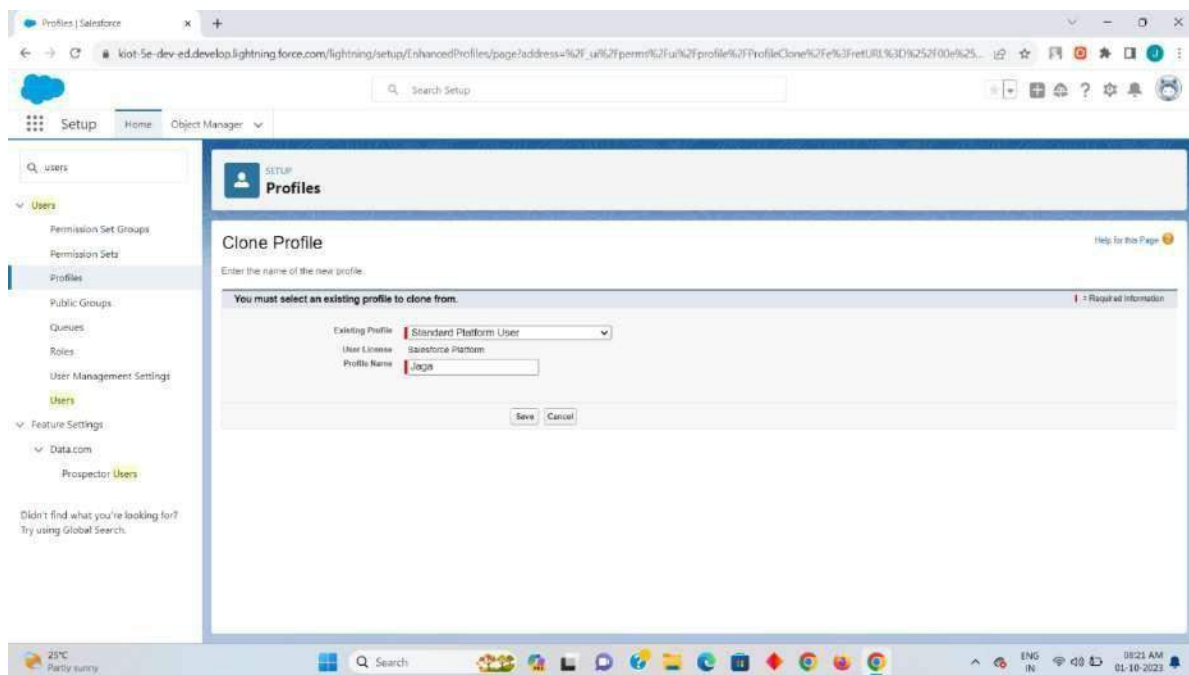


The screenshot shows the Salesforce Setup interface. The left sidebar contains the navigation menu with 'Users' selected. The main content area displays the 'Profiles' page. The table lists various profiles and their associated user licenses and custom settings. The 'Custom' column has checkboxes for various permissions, with 'Salesforce' and 'Salesforce' checked for the 'Salesforce' profile.

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit   Clone	Analytics Cloud Integration User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Analytics Cloud Security User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Chatter External User	Chatter External	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Chatter Free User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Chatter Moderator User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Contract Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Cross Org Data Proxy User	XOrg Proxy User	<input type="checkbox"/>
<input type="checkbox"/> Edit   Del   ...	Custom: Marketing Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit   Del   ...	Custom: Sales Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit   Del   ...	Custom: Support Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Customer Community Login User	Customer Community Login	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Customer Community Plus Login User	Customer Community Plus Login	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Customer Community Plus User	Customer Community Plus	<input type="checkbox"/>

## Step 2:

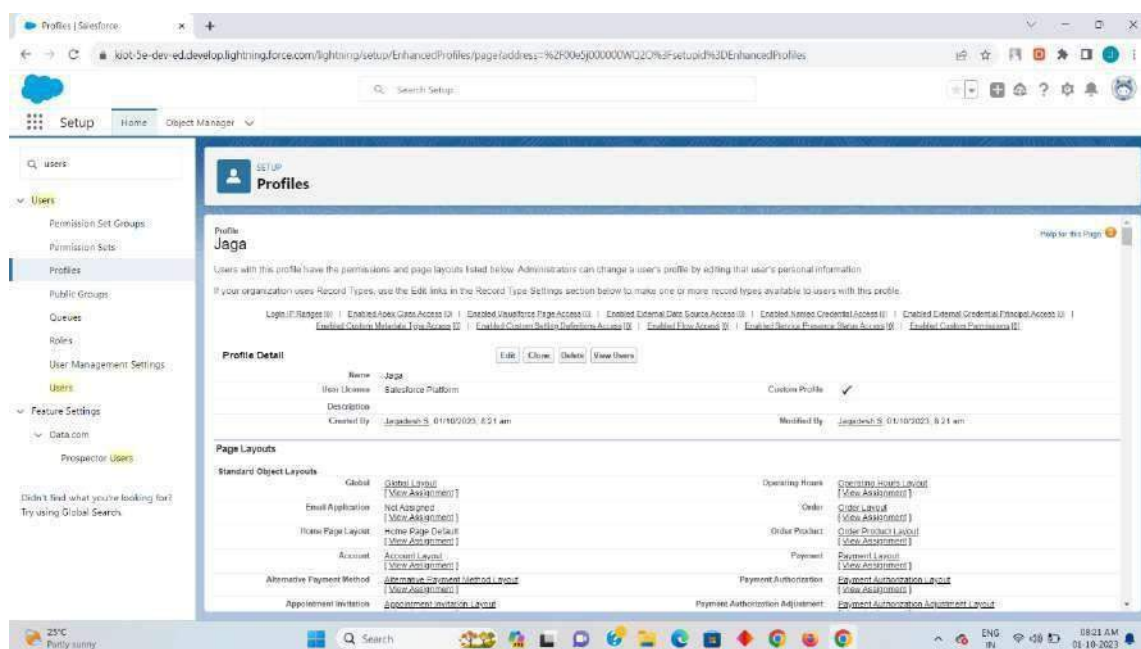
Click on the new to create a new profile along with the label and Api

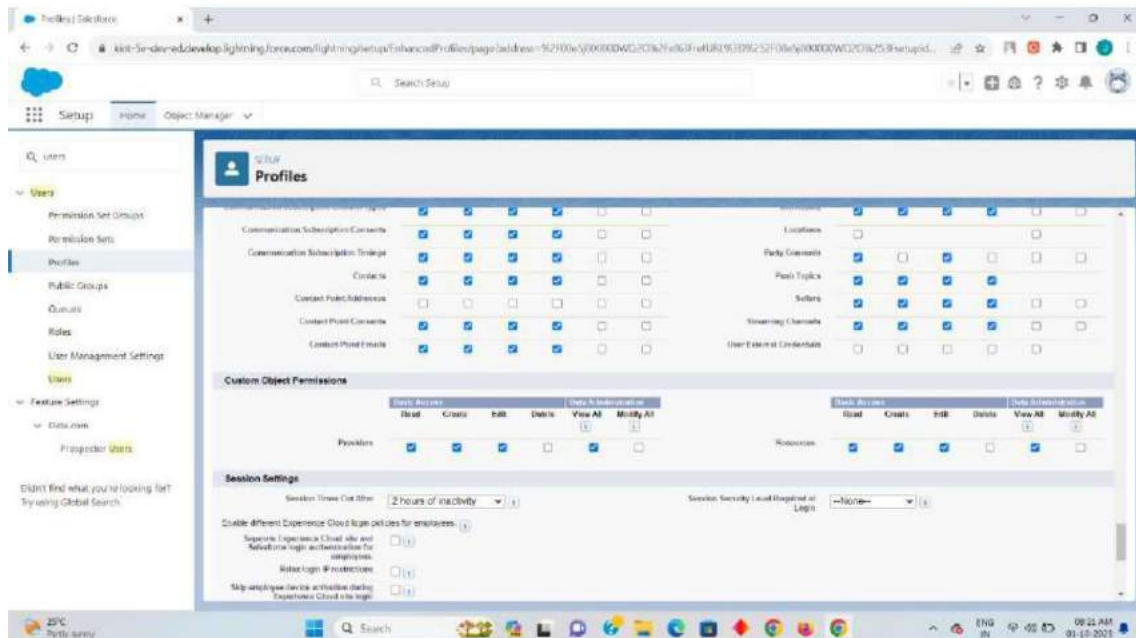
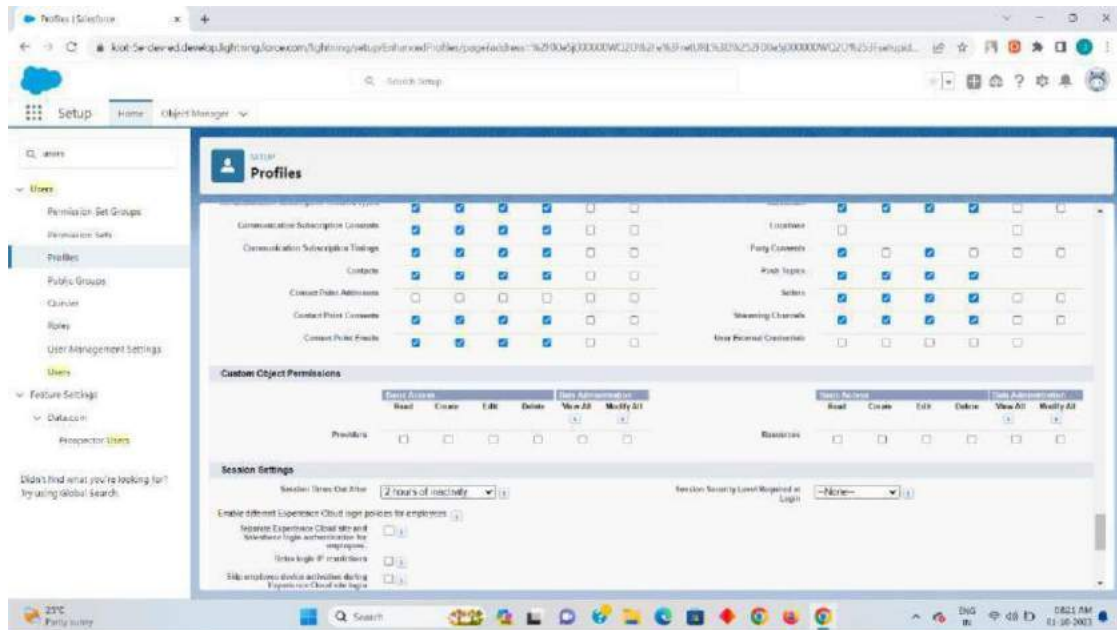


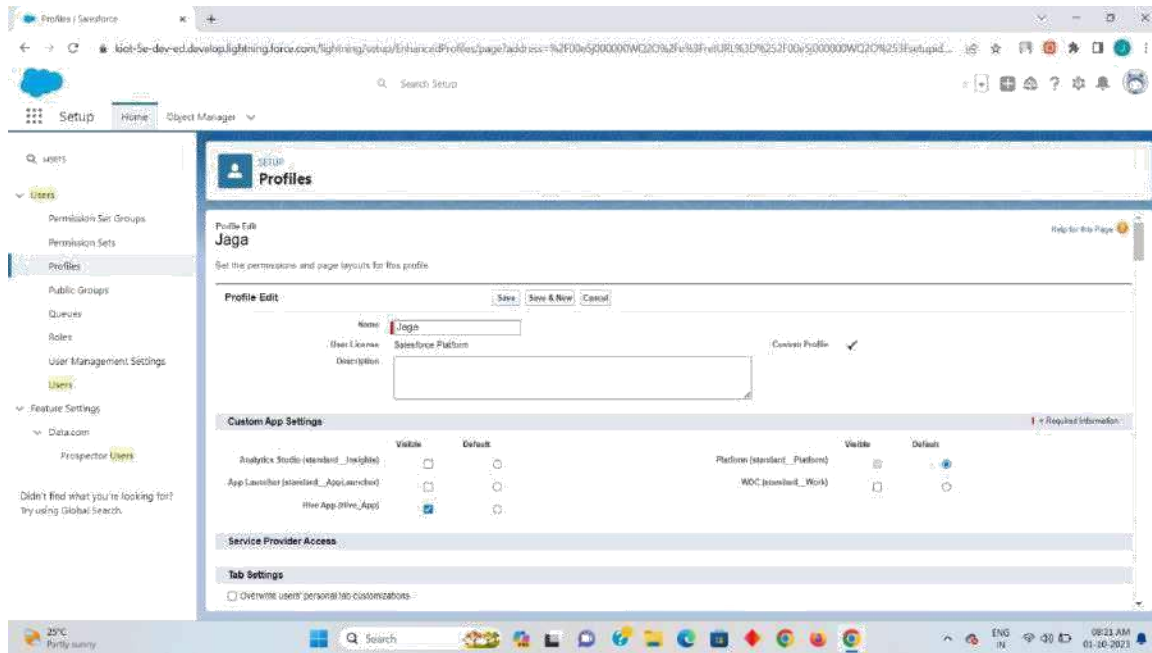
Here I had made it my profile name as Jaga and the existing profile as Standard Platform User.

## 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.

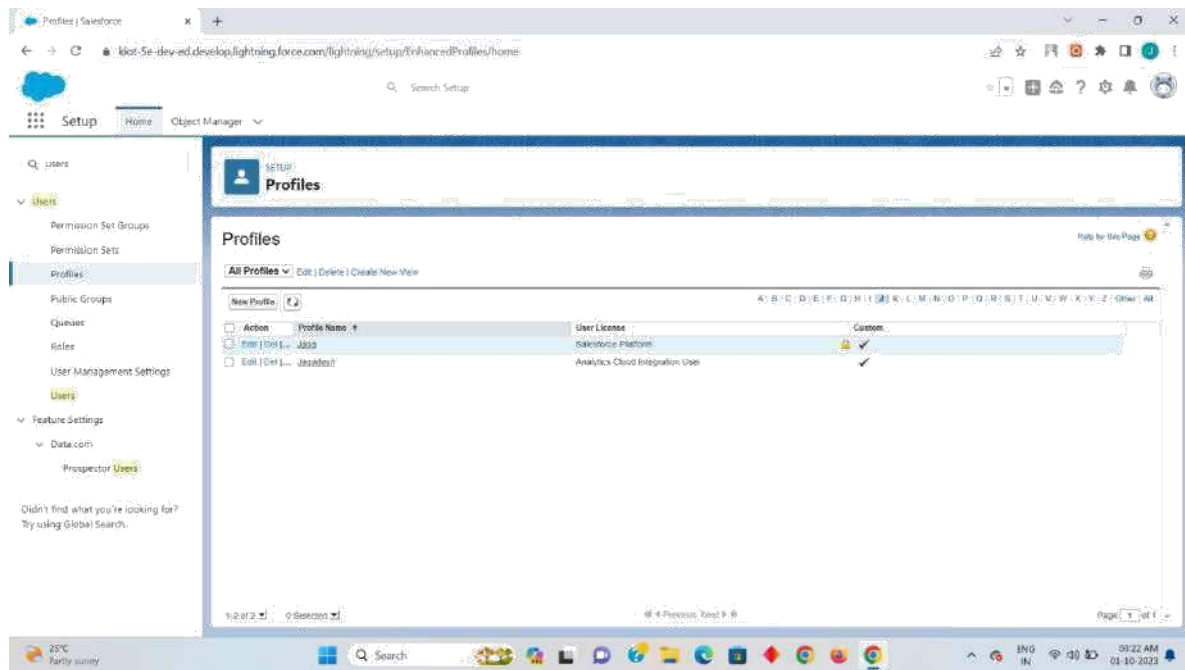






## Step 4

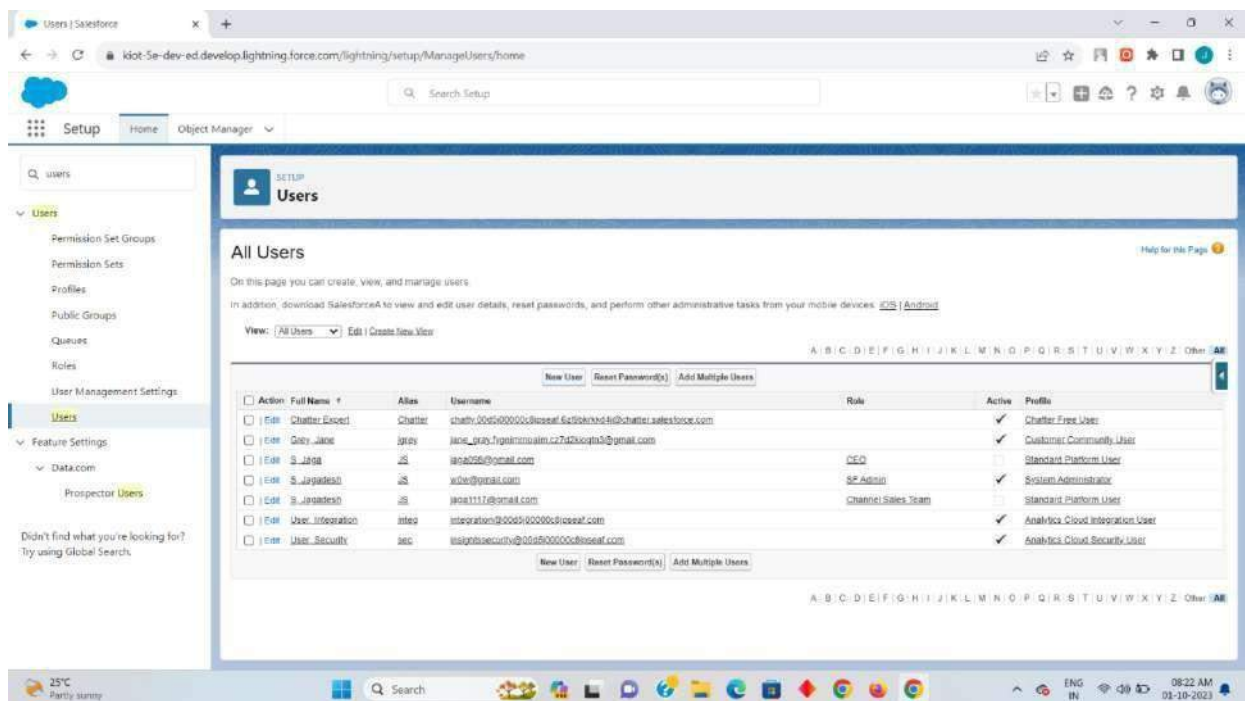
Now you can preview your created profile on the profile option here my profile name jaga has been created with the access of read,create,edit along with view on it



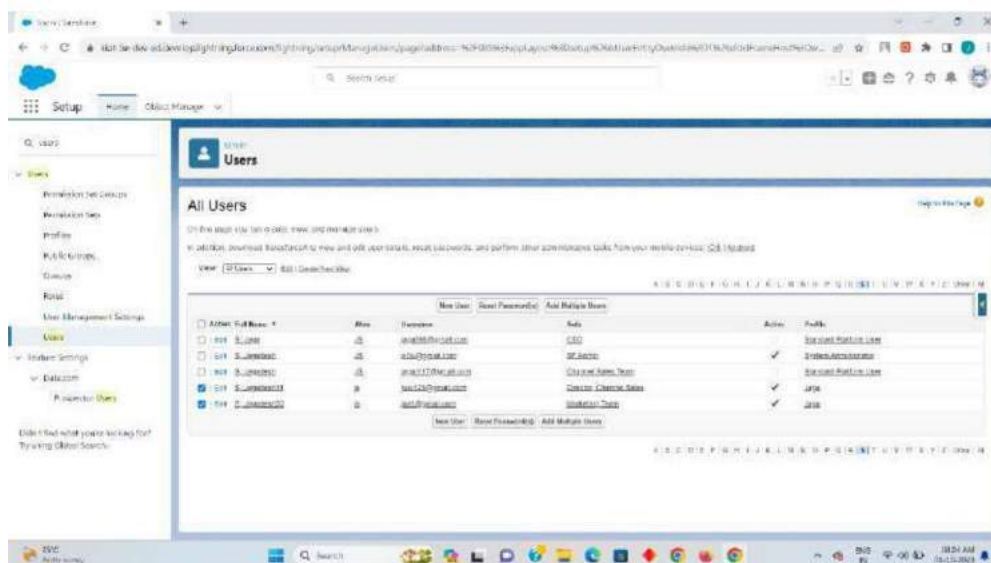
## Step 5:

Now create two users by enter into the Setup-quick search[user] and then click on new user after clicking that you need to create two user along

with the profile as Jaga which we have created on the step 2. once the one user has been created click on the save&new so that you can create the second user and there the user name can be created with alternate name but with the same user profile and once the two users are created 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)

Setup

Permission Sets

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

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

All Permission Sets | Edit | Delete | Create New View

Name	Description	License
Admin	Allows access to the store. Lets users see products and categories.	B2B Buyer Permission Set One (test)
Buyer	Provides an buyer capabilities, and allows access to Manage carts as	B2B Buyer Manager Permission Set One (test)
Order User	Provides that the user is a Sales Cloud or Service Cloud user	Order User
Commerce Admin	Allows access to commerce admin features	Commerce Admin Permission Set One (test)
Service Cloud Admin	Manage Service Cloud Voice contact centers that use Reason for Contact	Service Cloud Voice User
Service Cloud Agent	Access agent features in Service Cloud Voice contact centers that use	Service Cloud Voice User
Service Cloud Supervisor	Access supervisor features in Service Cloud Voice contact centers that use	Service Cloud Voice User
Order Manager	Let's user's create, read, edit, and delete existing publications, sales,	Order Manager
Order Manager (Admin)	Let's user's create, read, edit, and delete existing publications, sales,	Order Manager
Order Manager (User)	Let's user's create, read, edit, and delete existing publications, sales,	Order Manager
Order Management (Admin)	Let's user's create, read, edit, and delete existing publications, sales,	Order Management (Admin)
Order Management (User)	Let's user's create, read, edit, and delete existing publications, sales,	Order Management (User)
Order Management (User)	Let's user's create, read, edit, and delete existing publications, sales,	Order Management (User)

Permission Sets (Salesforce)

Setup

Permission Sets

Create

Enter permission set information

Label: permission12

API Name: permission12

Description:

Section Attribution 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.

License:

Save Cancel

Permission Sets | Salesforce

Search Setup

Setup Home Object Manager

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Quotas

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

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

### Permission Sets

permission12

Find Settings Close Delete Edit Properties Manage Assignments

#### Permission Set Overview

Description	API Name
License	permission12
Session Activation Required	Naamgeva's Profile
Last Modified By	Created By
ajayash@S	ajayash@S
01/10/2023 8:24 am	01/10/2023 8:24 am

#### Apps

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

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

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

**App Permissions**  
Permissions to perform app-specific actions, such as "Manage Call Centers"

**Apex Class Access**  
Permissions to execute Apex classes

**Visualforce Page Access**  
Permissions to execute Visualforce pages

**External Data Source Access**

23°C Partly sunny

Search

ENG IN 06:34 AM 01-10-2023

Permission Sets | Salesforce

Search Setup

Setup Home Object Manager

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Quotas

Roles

User Management Settings

Users

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Data.com

Prospector Users

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### Permission Sets

permission12

Find Settings Close Delete Edit Properties Manage Assignments

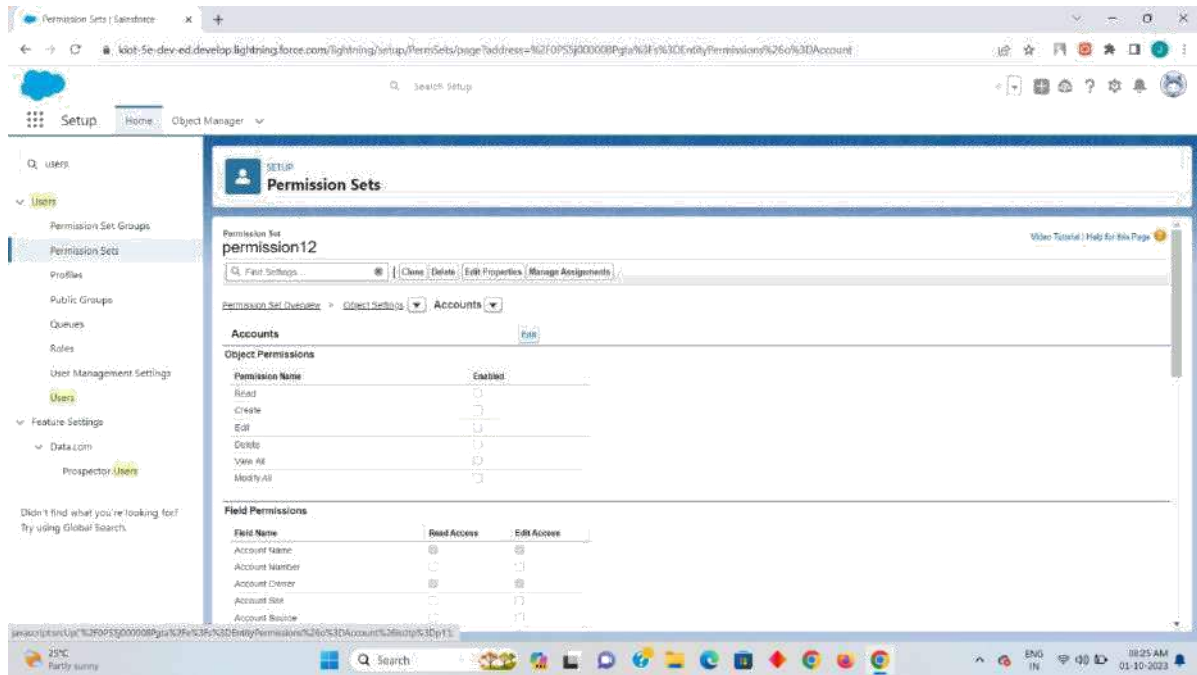
Permission Set Overview Object Settings

Object Name	Object Permissions	Total Fields	Tab Settings
Account	No Access	9	—
Account	No Access	44	—
Account	No Access	—	—
Account	No Access	—	—
Account	No Access	—	—
Account	No Access	27	—
Account	No Access	14	—
Account	No Access	—	—
Account	No Access	—	—
Account	No Access	3	—
Account	No Access	17	—
Account	No Access	4	—
Account	No Access	—	—
Account	No Access	—	—
Account	No Access	9	—
Account	No Access	30	—
Account	No Access	18	—

23°C Partly sunny

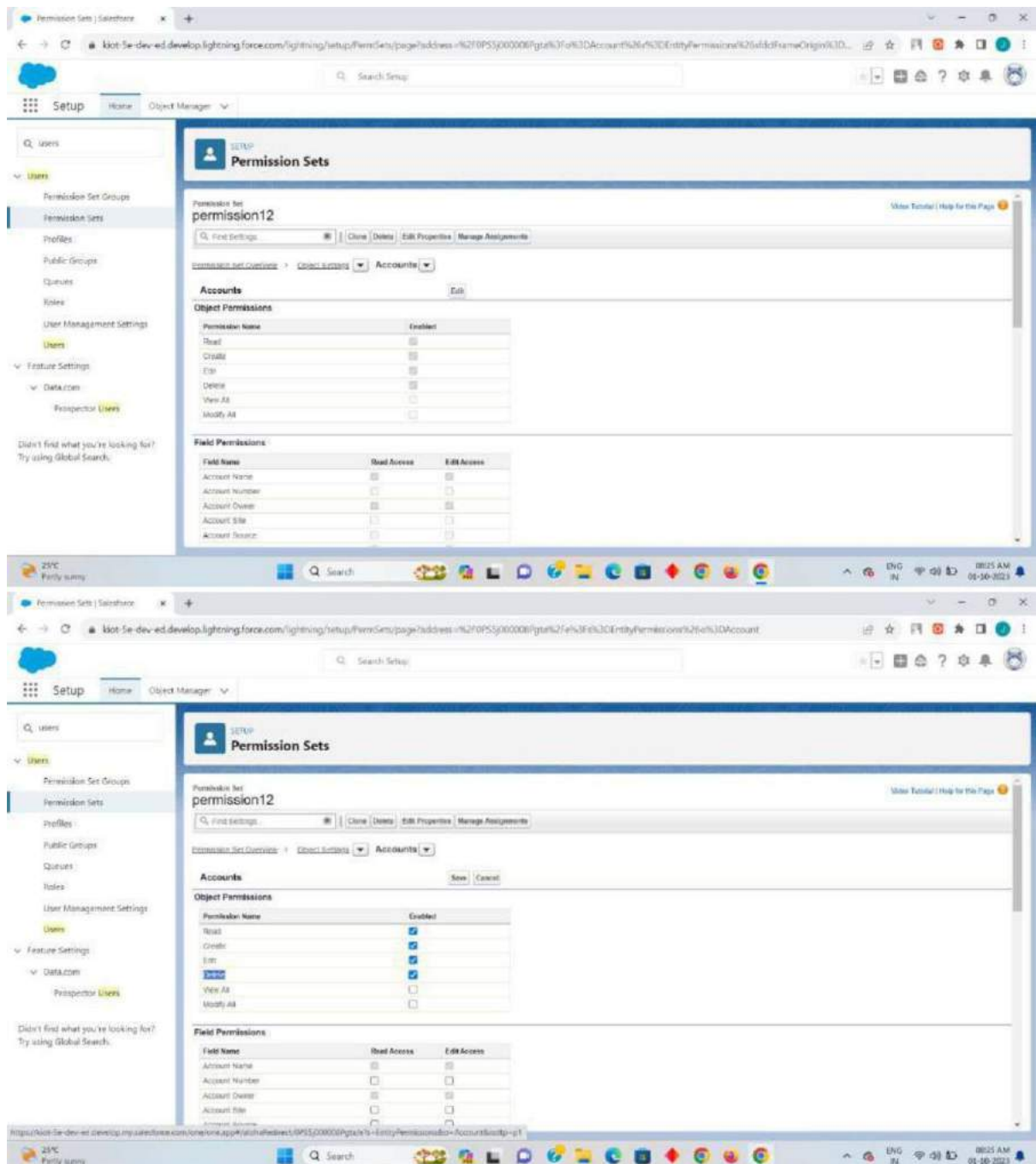
Search

ENG IN 06:34 AM 01-10-2023



## Step 7:

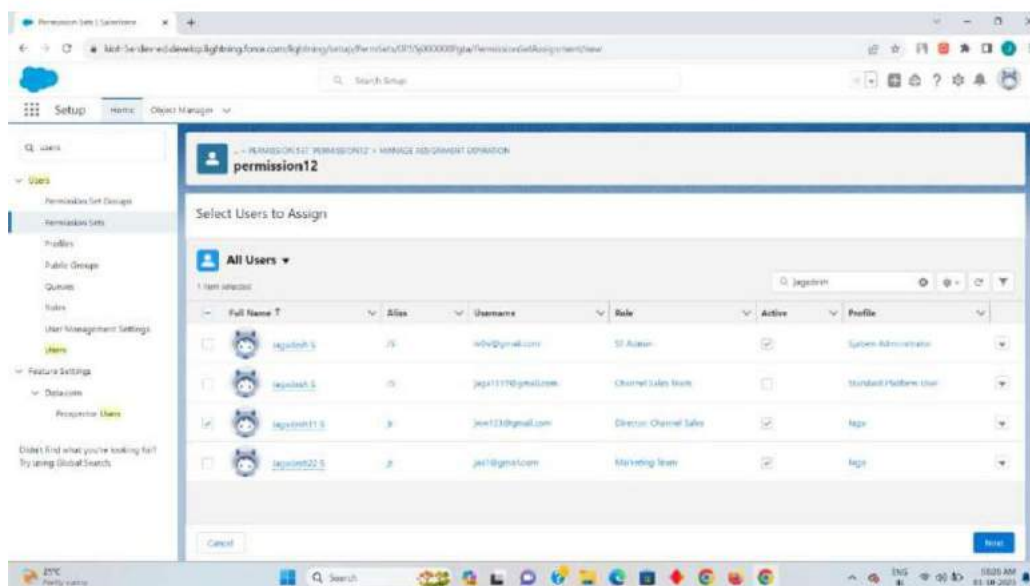
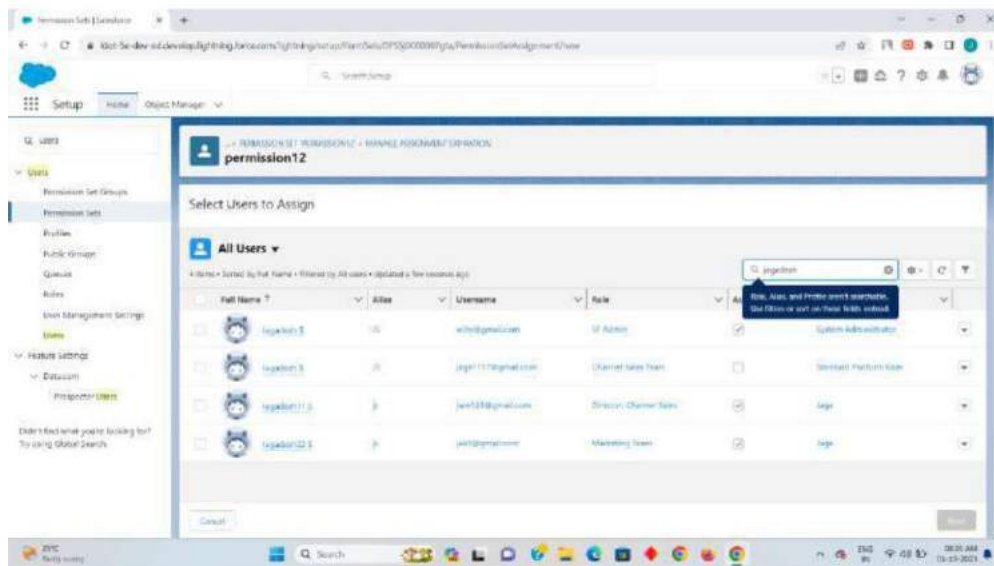
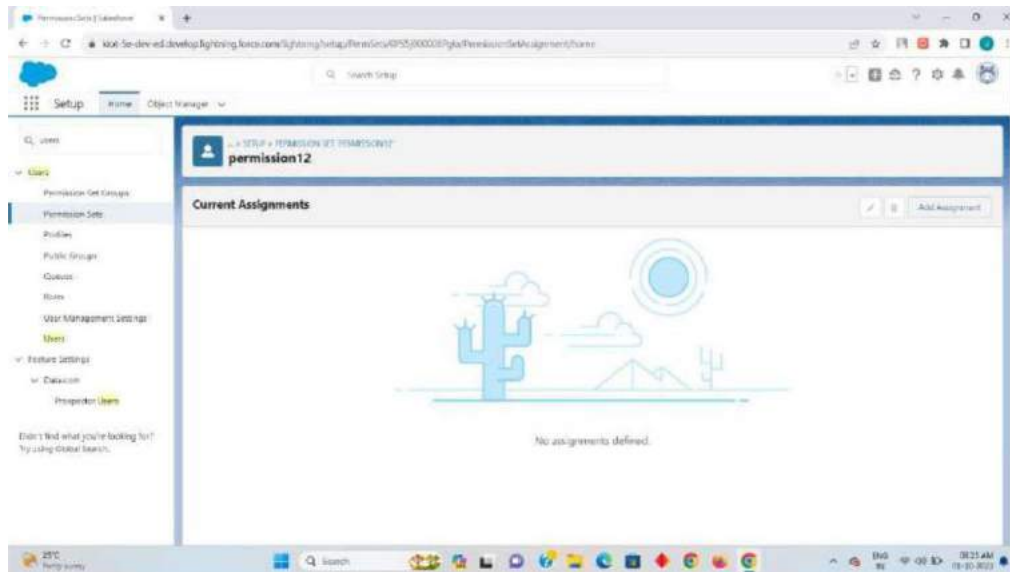
Now to give the specific delete access to the user click on edit on the Account and then enable the read,create,edit and the delete on it so that the permission set will have a specific special access on it. once it has been done click on save and then click on manage assignment.



## Step 8

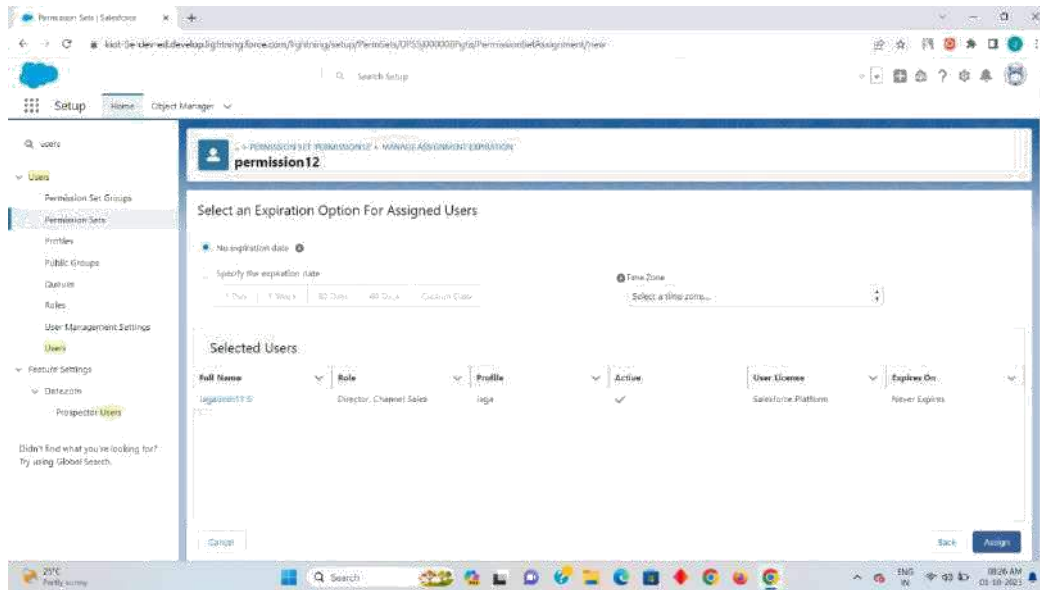
Now click on add assignment there you will find your two created users click on any one user to give a special access as delete on it and then click on assign so that the specific selected user can have a special access as delete on it.



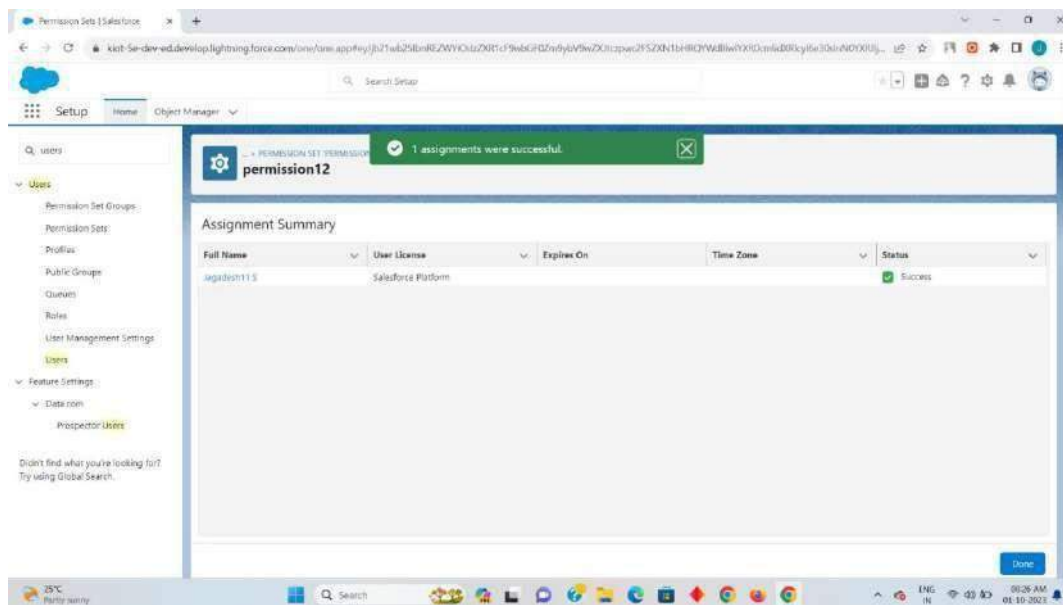


Click on next.





Now click on Assign.



Now the specific access for the Jagadesh11 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**.

<div> <div> </div> <div> <div>SETUP &gt; OBJECT MANAGER</div> <div>Survey Result</div> </div> </div>					
<div>Details</div> <div>Fields &amp; Relationships</div> <div>Page Layouts</div> <div>Lightning Record Pages</div> <div>Buttons, Links, and Actions</div> <div>Compact Layouts</div> <div>Field Sets</div> <div>Object Limits</div> <div>Record Types</div> <div>Related Lookup Filters</div> <div>Search Layouts</div> <div>Search Layouts for Salesforce Classic</div> <div>Triggers</div> <div>Validation Rules</div>	<div>Fields &amp; Relationships</div> <div>8 Items, Sorted by Name</div> <div>Quick Find</div>		<div>New</div> <div>Deleted Fields</div> <div>Field Dependencies</div> <div>Set History Tracking</div>		
	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

Description

Related Entity Type  
Survey Result

Folder  
Public Email Templates

Made in Email Template Builder  
☒

Message Content

Subject  
Thank You For Completing Our Survey!

HTML Value

Enhanced Letterhead

Hi {{Survey\_Result\_\_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 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

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 'Survey - Thank You Email'. The page includes a header with 'Edit Email Alert' and 'Survey - Thank You Email', and a sub-header with 'Email Alert Edit' and buttons for 'Save', 'Save & New', and 'Cancel'. Below the header, there is a section for 'Edit Email Alert' with a red asterisk indicating required information. The fields include: Description (Survey - Thank You Email), Unique Name (Survey\_Thank\_You\_Email), Object (Survey Result), Email Template (Thank You Email - Survey), Protected Component (checkbox), Recipient Type (Search: User, for: [blank], Find), and Recipients (Available Recipients: User: Integration User, User: Rakesh Gupta, User: Security User; Selected Recipients: Email Field: Email; Add, Remove buttons). Below the Recipients section, there is a note: 'You can enter up to five (5) email addresses to be notified.' and a text area for 'Additional Emails'. At the bottom, there is a 'From Email Address' section with '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 also includes a 'Help for this Page' link and 'Save', 'Save & New', and 'Cancel' buttons at the bottom.

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	Value
Comment__c	← A Comment ×
Email__c	← A Email > Value ×
Name__c	← {!Name.firstName} {!Name.lastName}
Rating__c	← A Rating ×

+ 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.

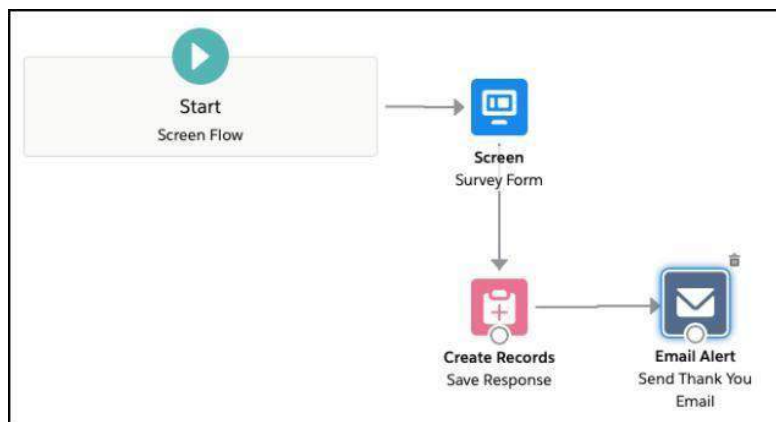
1. Under **Toolbox**, select **Element**.
2. Drag-and-drop **Action** element onto the Flow designer.
3. In the **Action** box, type **Survey – Thank You Email**.

4. Clicks on the **Survey – Thank You Email** email alert.

5. Click **Done**.

The screenshot shows a configuration window titled "Edit 'Survey - Thank You Email' email alert". At the top, 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." Below this, there are two input fields: "\* Label" with the value "Send Thank You Email" and "\* API Name" with the value "Send\_Thank\_You\_Email". A "Description" text area is empty. Under the "Set Input Values" section, there is a field for "Record ID" with the value "{!Save\_Response}". 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

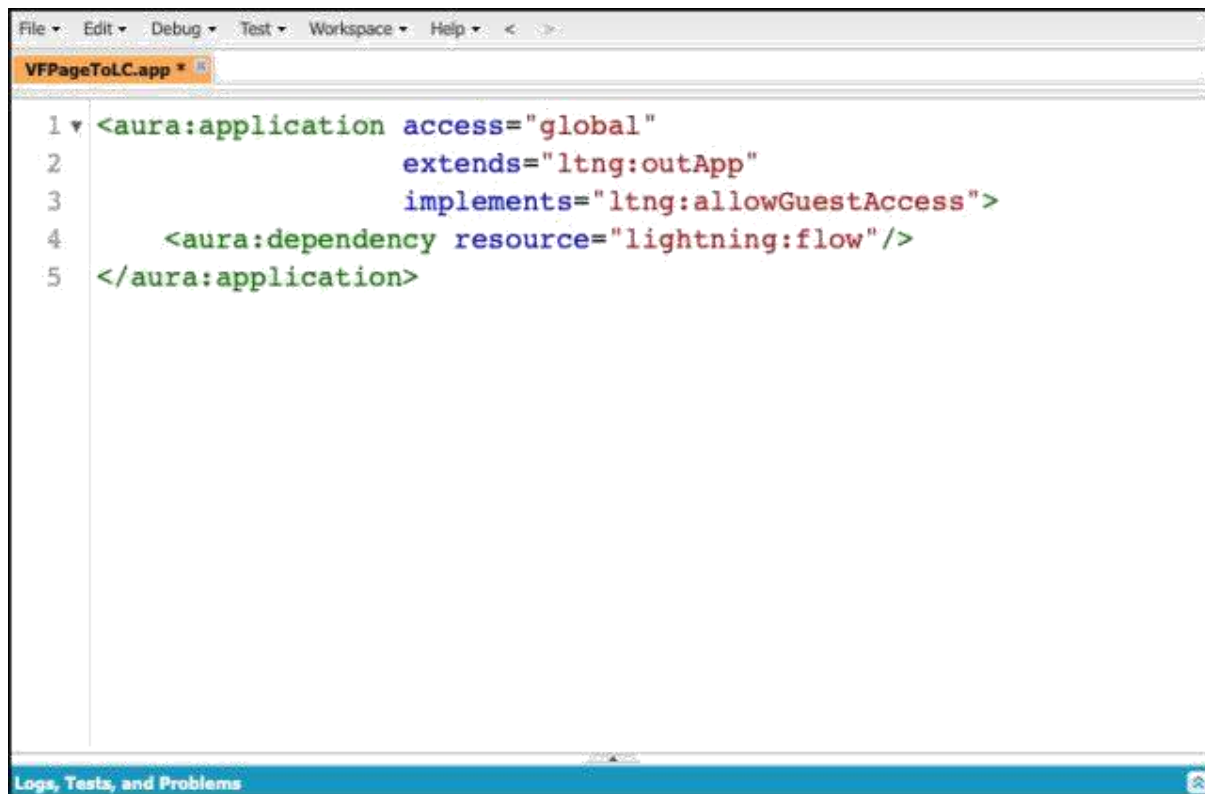
Cancel

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.



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

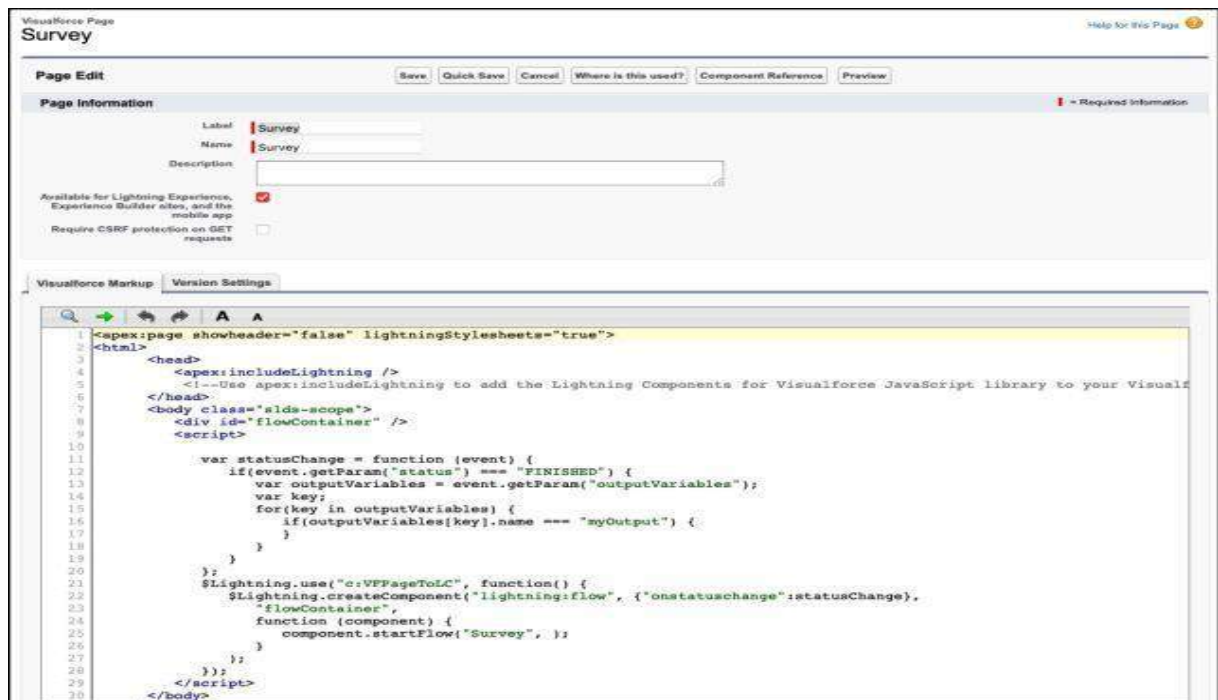
## Step 6: Create a Visualforce Page and Embed Your Flow Into It

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 [i]

Site Name: Survey [i]

Site Description: [Text Area]

Site Contact: Rakesh Gupta [Search] [i]

Default Record Owner: Rakesh Gupta [Search] [i]

Default Web Address: http://kathar-developer-edition.gus.force.com/ survey [i]

Active: ☒ [i]

Active Site Home Page: Survey [Search] [Preview]

Inactive Site Home Page: InMaintenance [Search] [Preview]

Site Template: SiteTemplate [Search] [i]

Site Robots.txt: [Text Field] [Search]

Site Favorite Icon: [Image Field] [Search]

Analytics Tracking Code: [Text Field] [i]

URL Rewriter Class: [Text Field] [Search] [i]

Enable Feeds: ☐

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

Require Secure Connections (HTTPS): ☒ [i]

Lightning Features for Guest Users: ☒ [i]

Upgrade all requests to HTTPS: ☒ [i]

Enable Content Sniffing Protection: ☒ [i]

Enable Browser Cross Site Scripting Protection: ☒ [i]

Referrer URL Protection: ☒ [i]

Guest Access to the Payments API: ☐ [i]

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

## Proof of Concept

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



Survey

Name

First Name

Alok

Last Name

Sinfal

\* Email

\* Rating

5

\* Comment

Awesome Blog

Next

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

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