

Naan Mudhalvan
Salesforce Developer(Course)
Assignment no 1

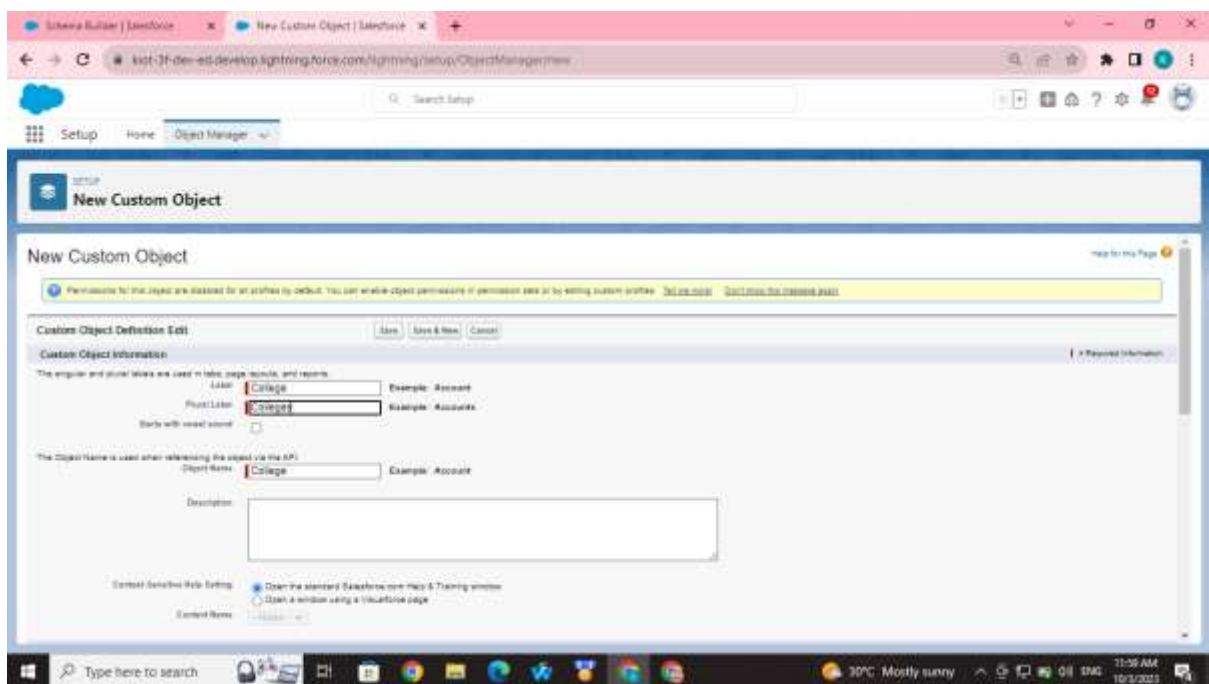
Name : Sowmiya A
Naan Mudhalvan id : au611220205035
Year & Dep : 4th year & IT
Batch : 2024
Zone no : Zone 8

1. Create a Master-Detail Relationship between two Custom objects and also create a Roll Up Summary Field to Calculate total number of records.

Solution:

Step 1: Create Custom Objects

Assuming you have two custom objects, let's call them "College" and "Department". If you haven't already created these objects, you can do so by going to Setup > Object Manager > Create > Custom Object.



The screenshot shows the Salesforce 'New Custom Object' setup page. The browser address bar indicates the URL is `localhost:5775/lightning/setup/ObjectManager/new`. The page title is 'New Custom Object'. Below the title, there is a section for 'Custom Object Definition Edit' with buttons for 'Save', 'Save & New', and 'Cancel'. The 'Custom Object Information' section contains the following fields:

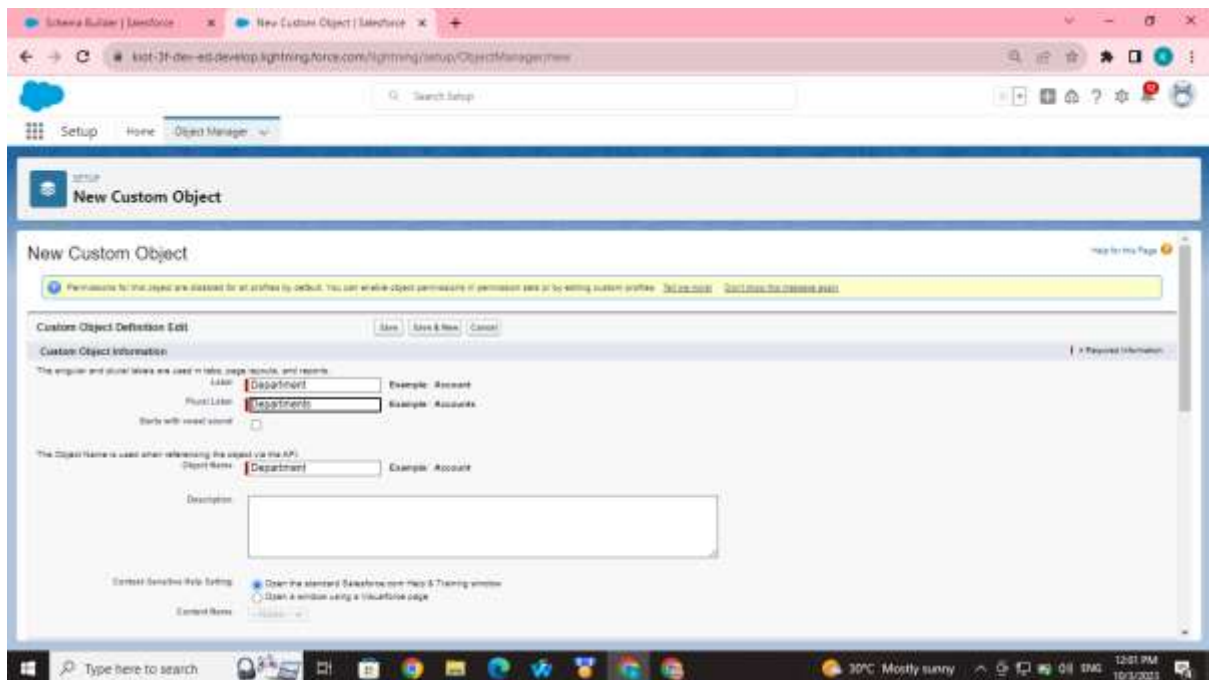
- Label:** 'College' (Example: Account)
- Plural Label:** 'Colleges' (Example: Accounts)
- Starts with word 'word':** ☐
- Object Name:** 'College' (Example: Account)
- Description:** (Empty text area)

At the bottom, there are options for 'Default Detail View Settings':

- ☒ Open the standard Salesforce.com view & Thinning window
- ☐ Open a window using a Salesforce page

The 'Default Name' field is also visible.

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

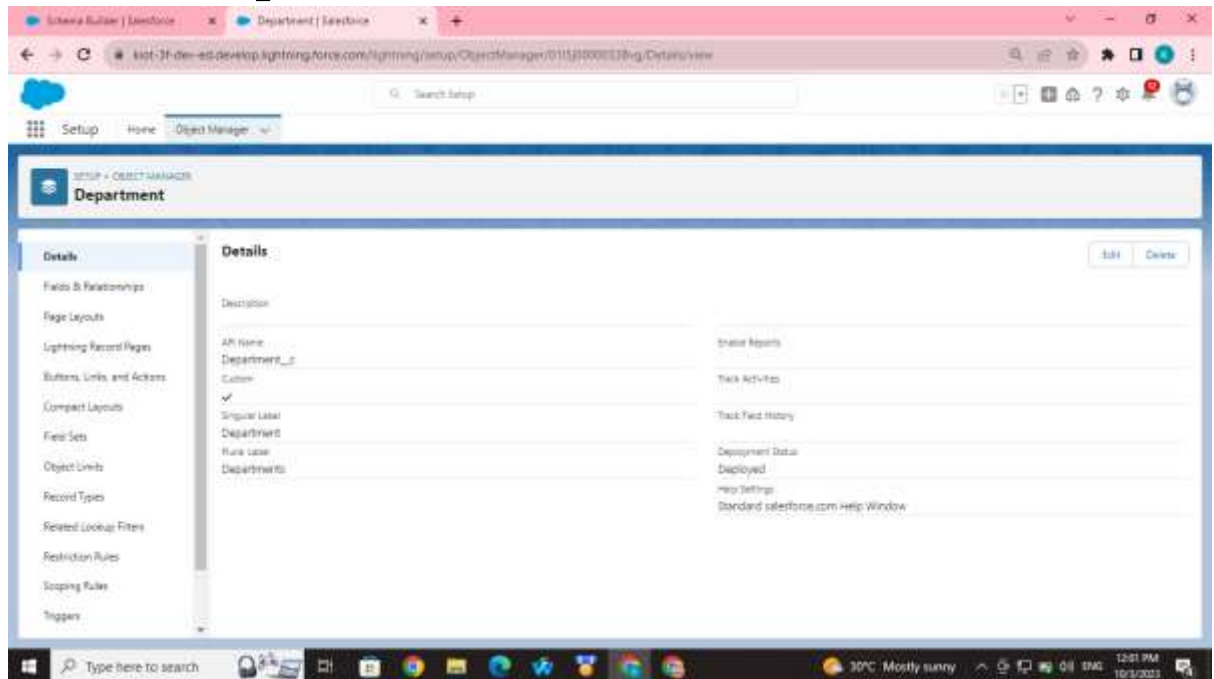


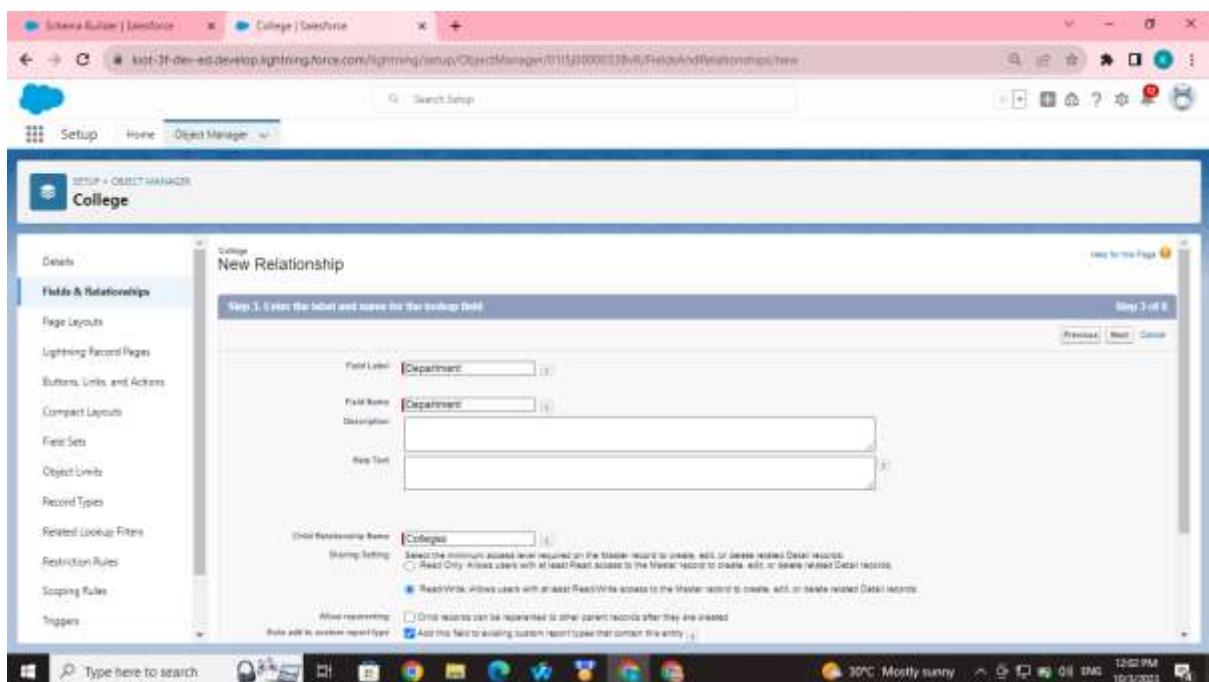
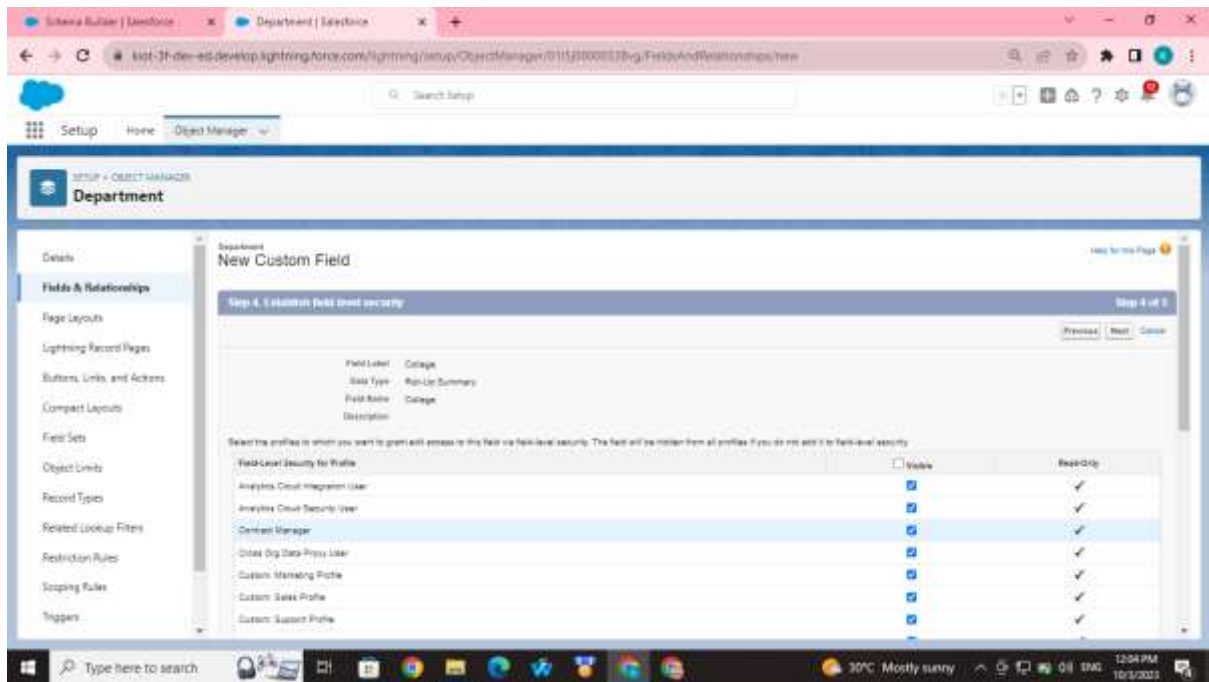
Step 2: Create a Master-Detail Relationship

To create a Master-Detail relationship between these two custom objects, follow these steps:

1. Go to Setup > Object Manager.
2. Click on "College" 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."
7. Choose " Department " 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" to calculate the total number of related records in "Department":

- 1. Still on the "College" 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" 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.**

Schema Builder | Salesforce

Department | Salesforce

kit-3f-dev-ed-develop.lightning.force.com/lightning/setup/ObjectManager/011530001278ug-FriidvAndRelationships/view

Search Setup

Setup Home Object Manager

DETAILS

Fields & Relationships

3 Items, Sorted by First Label

Quick Find

New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
College	College__c	Roll-Up Summary (COUNT College)		
Created By	CreatedBy	Lookup(User)		
Department Name	Name	Text(20)		
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User Group)		

Type here to search

Schema Builder | Salesforce

Tabs | Salesforce

kit-3f-dev-ed-develop.lightning.force.com/lightning/setup/CustomTabs/page/address=0%2FSetup%2Fu%2FObjectCustomTabWizard.jsp%3FretURL%2F%251...

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

Users

Data

Email

PLATFORM TOOLS

Subscription Management

Apps

Feature Settings

SETUP

Tabs

New Custom Object Tab

Help for this Page

Step 1: Enter the Details

Step 1 of 2

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

Select an existing custom object or [create a new custom object here](#).

Object: **Book**

Tab Style: **Standard**

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users visit on the tab.

Select Page Custom Link: **None**

Enter a short description.

Description:

Next Cancel

Type here to search

Schema Builder | Salesforce

Tabs | Salesforce

kit-3f-dev-ed-develop.lightning.force.com/lightning/setup/CustomTabs/page/address=0%2FSetup%2Fu%2FObjectCustomTabWizard.jsp%3FretURL%2F%251...

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

Users

Data

Email

PLATFORM TOOLS

Subscription Management

Apps

Feature Settings

Schema Builder | Salesforce x Department | Salesforce x

kit-3f-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/011530001378ug-FieldsAndRelationships:here

Setup Home Object Manager

Department

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Department

New Custom Field

Step 3, Add to page layouts Step 3 of 5

Field Label College
Field Type Roll-Up Summary
Field Name College
Description

Select the page layouts that should include this field. This 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
☒ Department Layout

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

Previous Save & New Save Cancel

Type here to search

Schema Builder | Salesforce x Department | Salesforce x

kit-3f-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/011530001378ug-FieldsAndRelationships:here

Setup Home Object Manager

Department

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Department

New Custom Field

Step 3, Define the summary calculation Step 3 of 5

Select Object to Summarize

Master Object Department
Summarized Object Colleges

Select Roll-Up Type

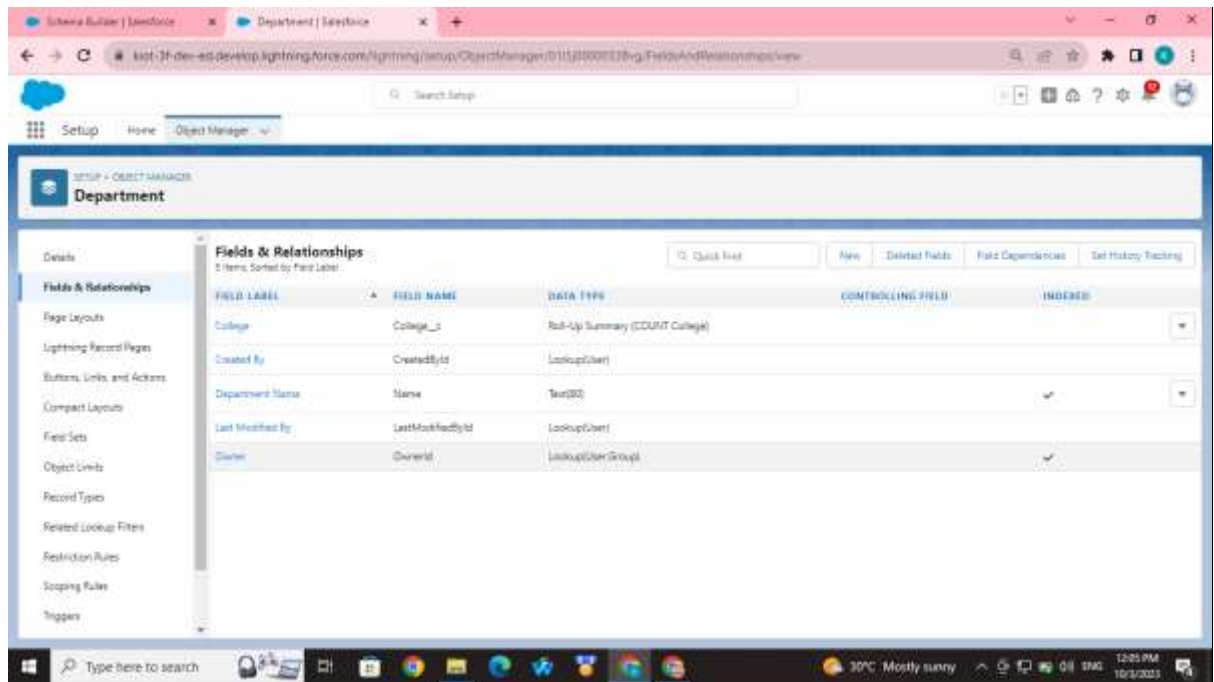
☒ COUNT
☐ SUM
☐ MIN
☐ MAX

Field to Aggregate

Filter Criteria

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

Previous Next Cancel

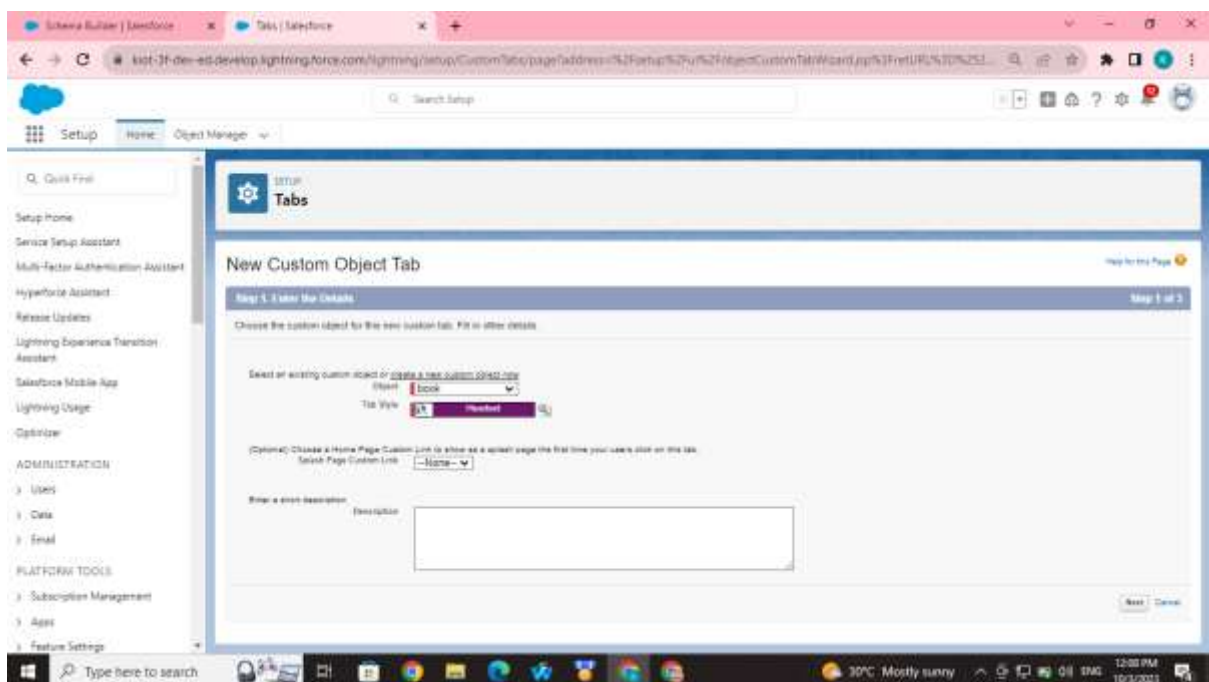
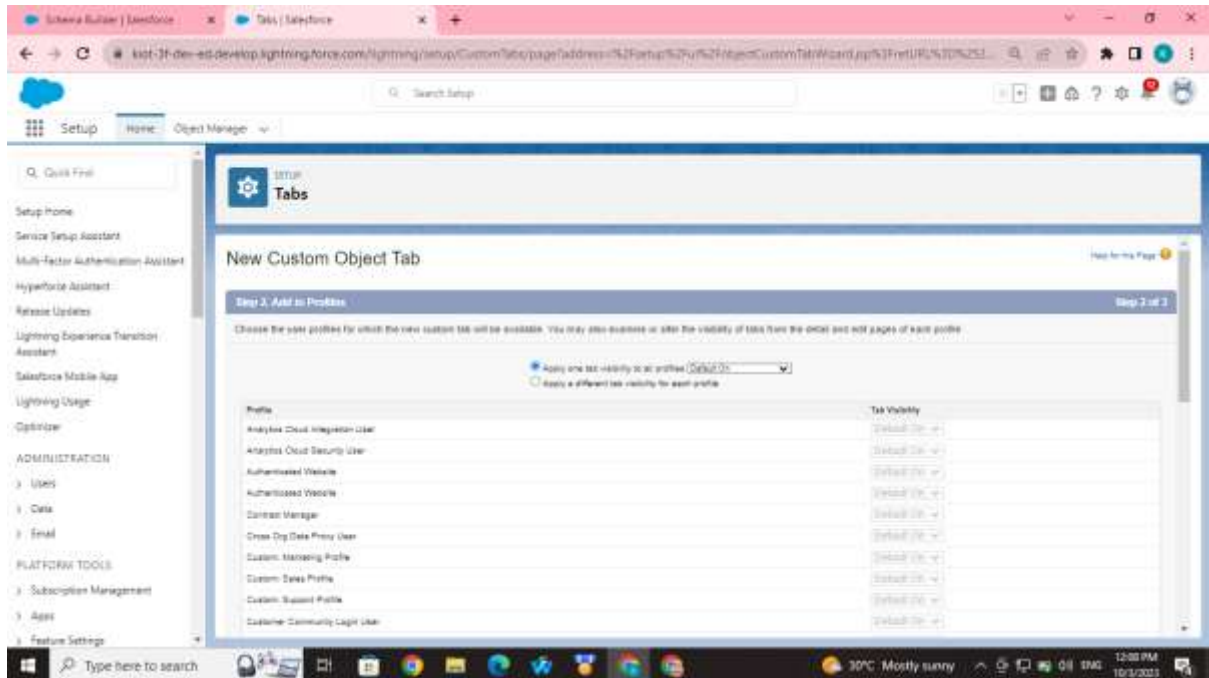


Step 4: Create a Lightning App

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.

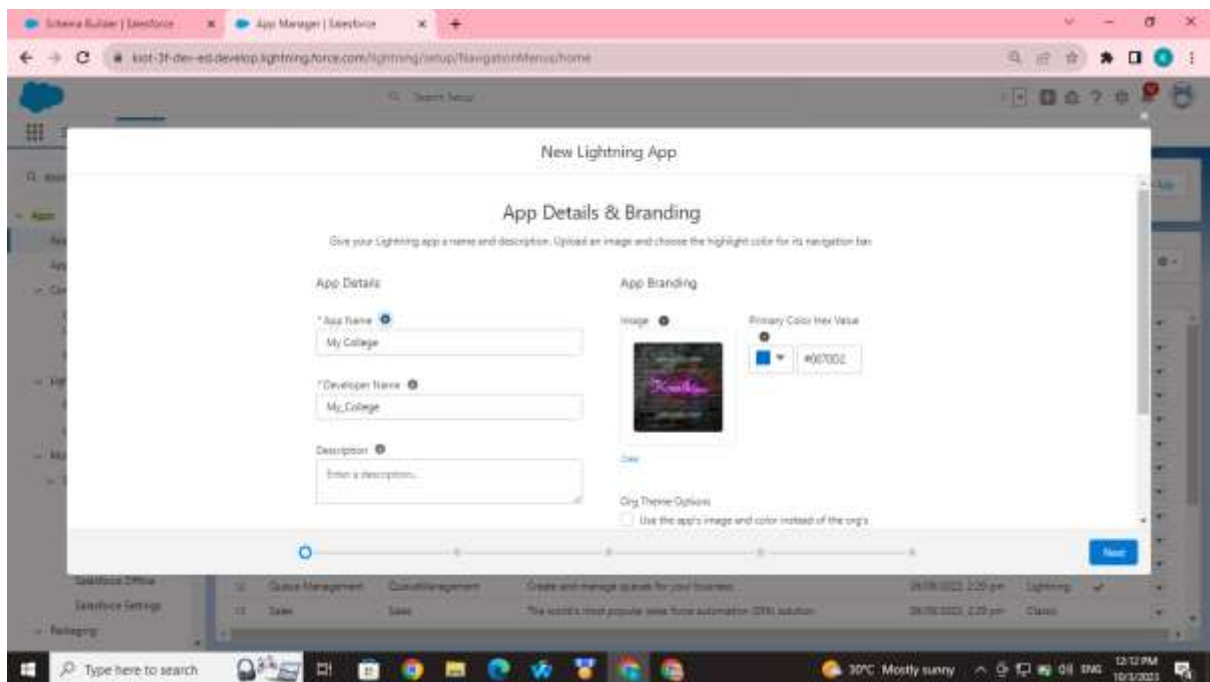
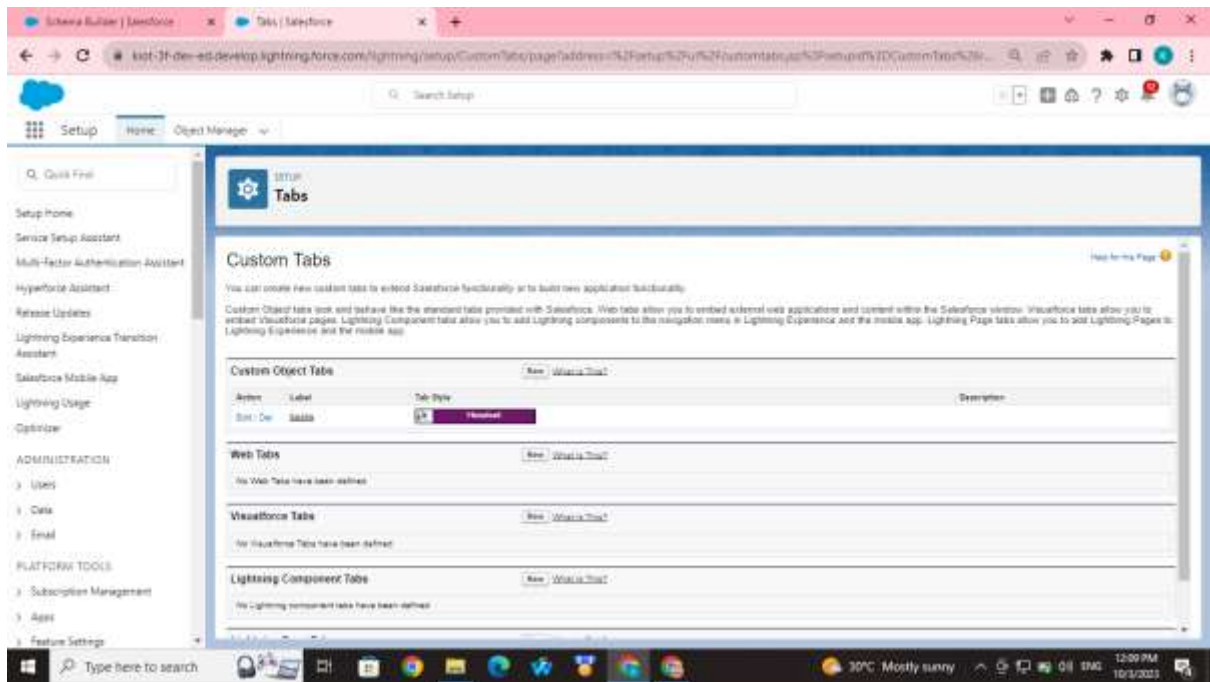


Screenshot of the Salesforce Setup page, specifically the "Add to Custom Apps" step. The page shows a list of standard Salesforce apps that can be added to custom apps. The "Include Tab" checkbox is checked for all listed apps.

Standard 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"/>
Service Console (standard__ServiceConsole)	<input checked="" type="checkbox"/>
High Volume Customer Portal User	<input checked="" type="checkbox"/>
Authenticated Website User	<input checked="" type="checkbox"/>
App Launcher (standard__AppLauncher)	<input checked="" type="checkbox"/>
Communities (standard__Communities)	<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"/>
Analytics Studio (standard__Analytics)	<input checked="" type="checkbox"/>
Flow Console (standard__FlowConsole)	<input checked="" type="checkbox"/>

Screenshot of the Salesforce Setup page, specifically the "Lightning Experience App Manager" page. The page displays a list of 21 apps, sorted by App Name, filtered by All app menu items, and sorted by Last Modified Date. The table includes columns for App Name, Developer Name, Description, Last Modified Date, App Type, and Visibility.

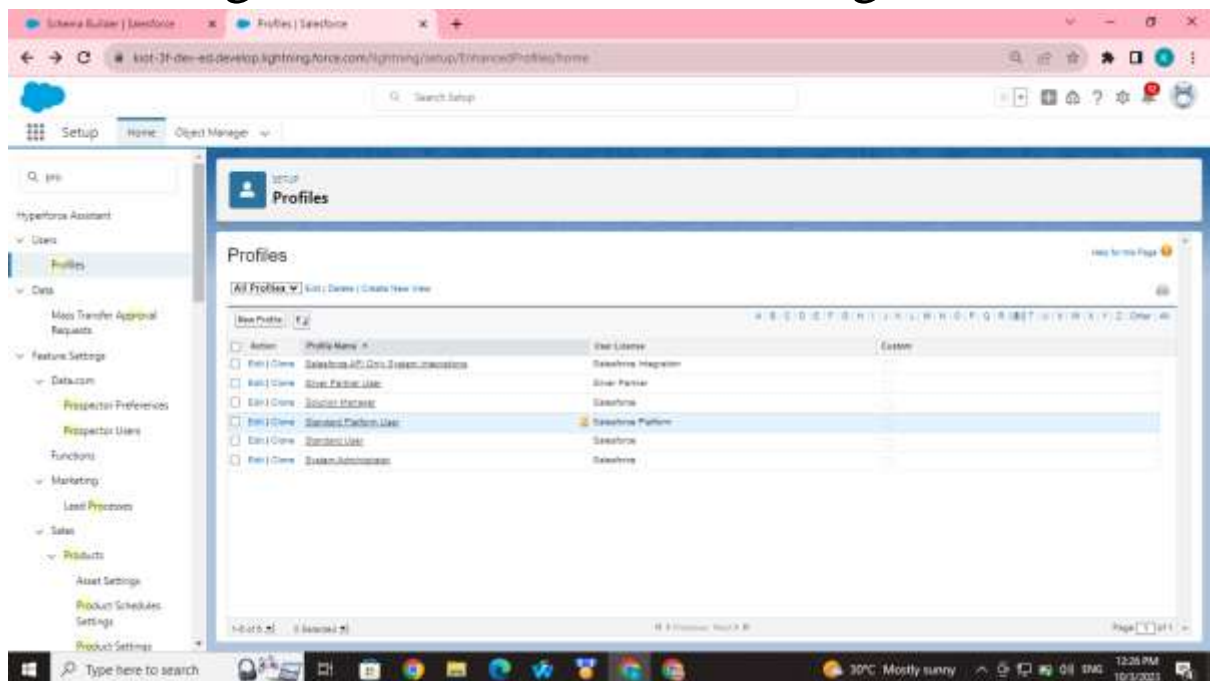
App Name	Developer Name	Description	Last Modified Date	App Type	Visibility
1. All Tabs	ATBTabler		26/09/2021, 2:29 pm	Classic	
2. Analytics Studio	Insights	Build CRM Analytics dashboards and apps	25/09/2021, 2:29 pm	Classic	✓
3. App Launcher	AppLauncher	App Launcher tabs	25/09/2021, 2:29 pm	Classic	✓
4. Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry	25/09/2021, 2:29 pm	Lightning	✓
5. Communities	Communities	Salesforce CRM Communities	26/09/2021, 2:29 pm	Classic	✓
6. Content	Content	Salesforce CRM Content	25/09/2021, 2:29 pm	Classic	✓
7. Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recaps	25/09/2021, 2:29 pm	Lightning	✓
8. Digital Experiences	SalesforceCMS	Manage content and media for all of your sites	25/09/2021, 2:29 pm	Lightning	✓
9. Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	26/09/2021, 2:29 pm	Lightning	✓
10. Marketing	Marketing	Best-in-class on-demand marketing automation	25/09/2021, 2:29 pm	Classic	✓
11. Platform	Platform	The fundamental Lightning Platform	25/09/2021, 2:29 pm	Classic	✓
12. Queue Management	QueueManagement	Create and manage queues for your business	25/09/2021, 2:29 pm	Lightning	✓
13. Sales	Sales	The world's most popular sales force automation (SFA) solution	26/09/2021, 2:29 pm	Classic	

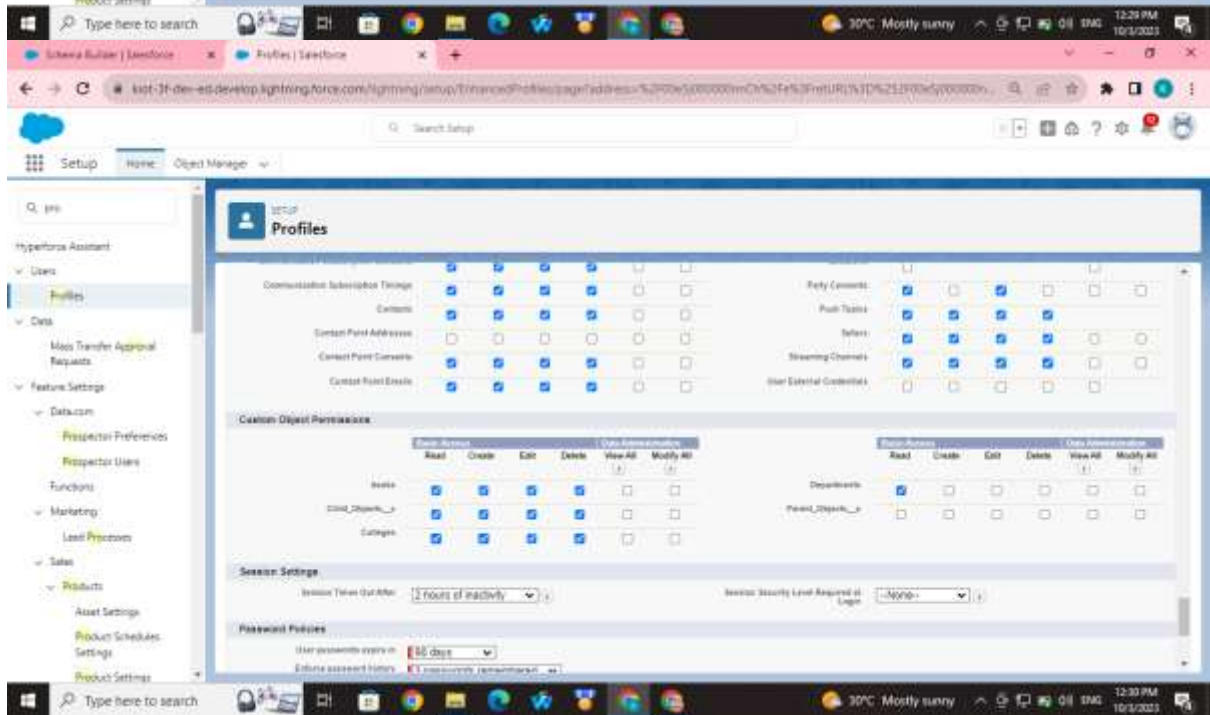
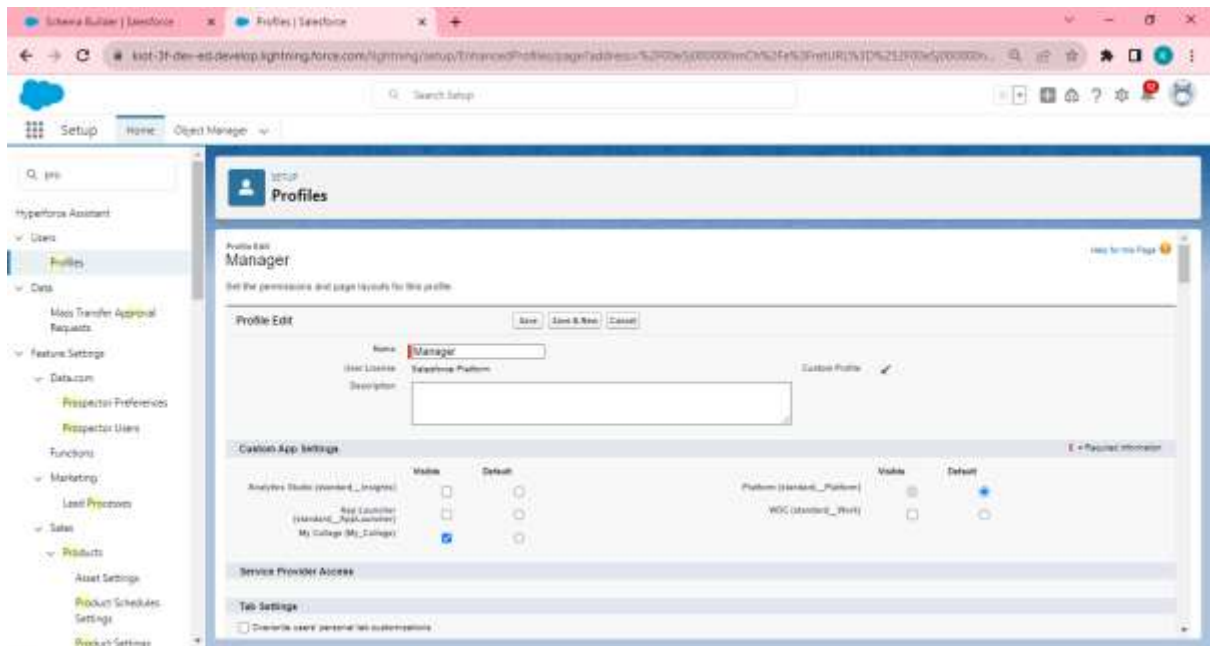


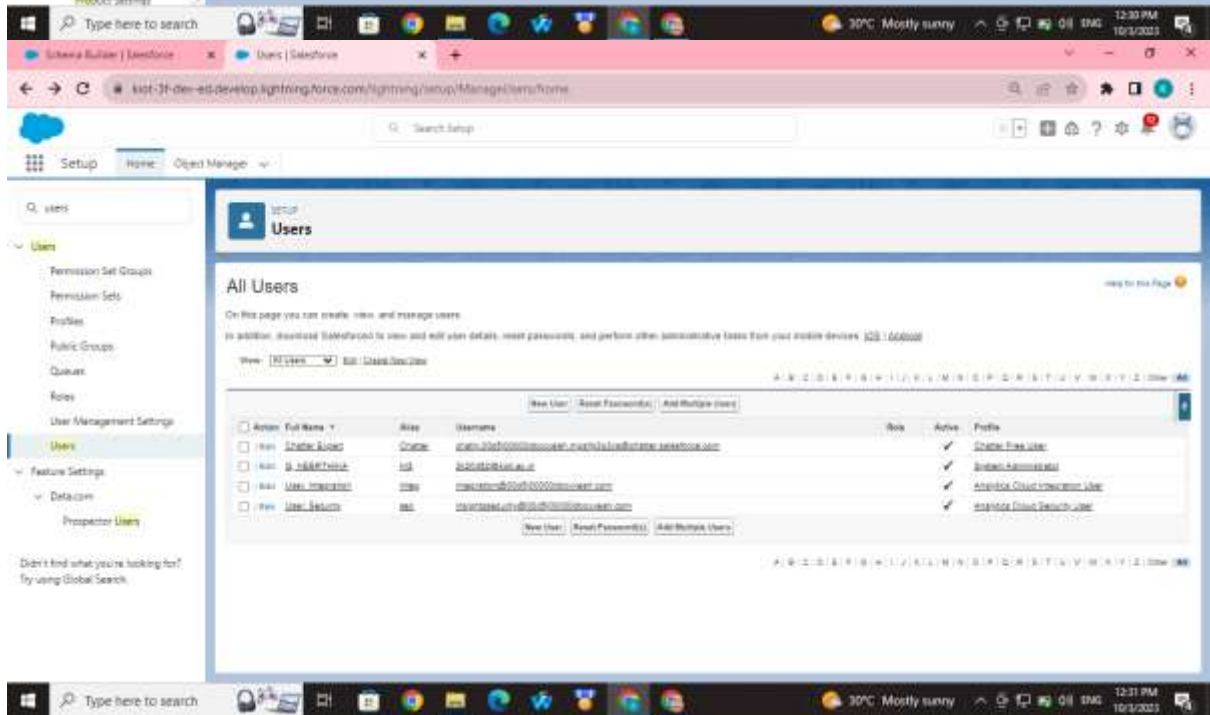
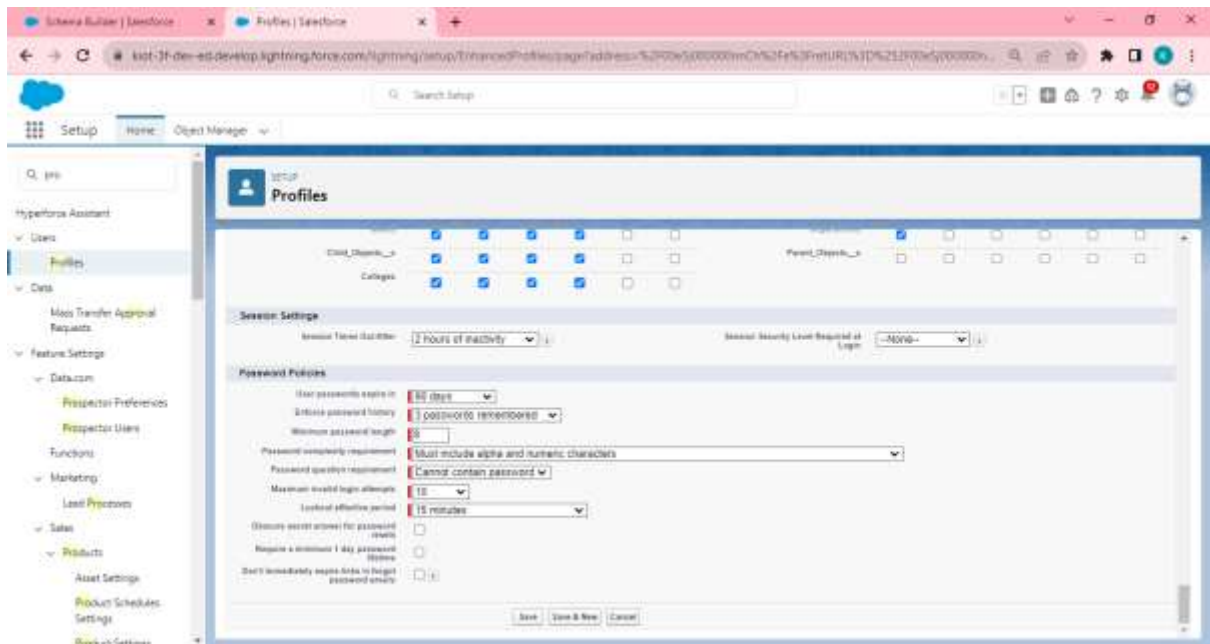
2. If there is 2 user, User A and User B in the organisation and we want in Account object that User A should not see the User B Record and user B should not see User A record then apply the Security for the users.

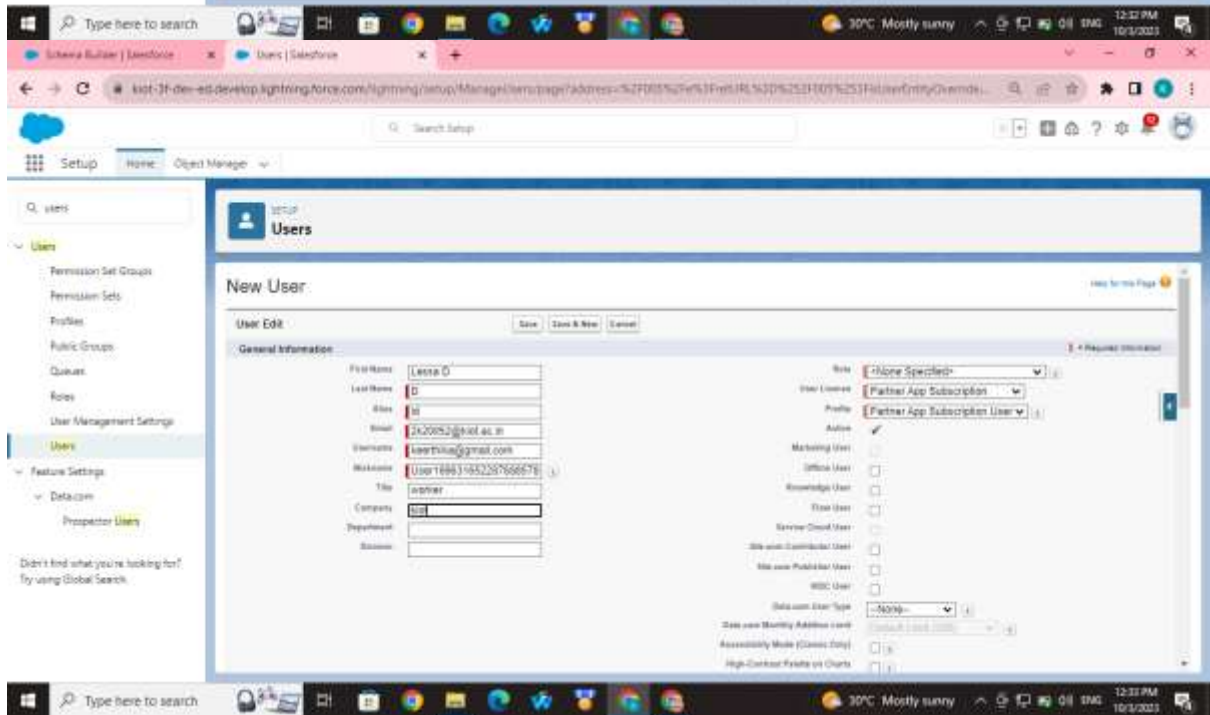
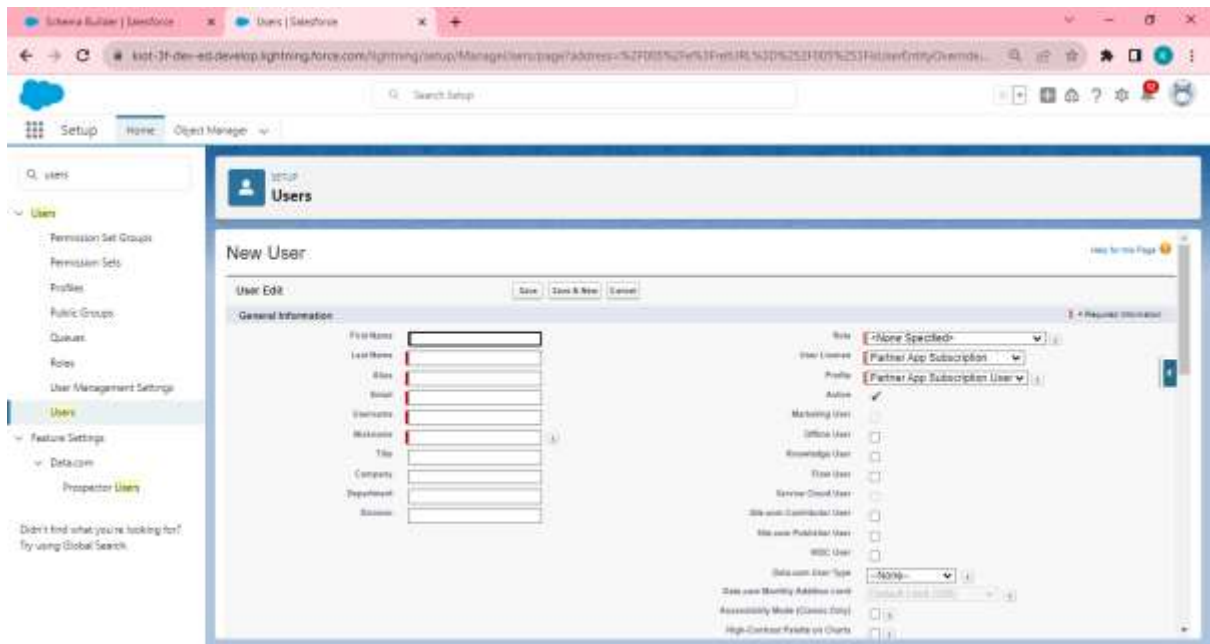
Solution:

Step 1: Create two separate custom profiles, one for Manager and one for sales manager.









Change Your Password

Enter a new password for **keerthi@klor.ac.in**. Make sure to include at least:

- 8 characters
- 1 letter
- 1 number

* New Password:

* Confirm New Password:

Security Question:

What is your pet's name?

* Answer:

Change Password

Password was last changed on: 03/10/2023, 12:42 pm.

salesforce

Username:

Password:

Log In

☒ Remember me

[Forgot Your Password?](#) [Use Custom Domain](#)


[Not a customer?](#) [Try for Free](#)

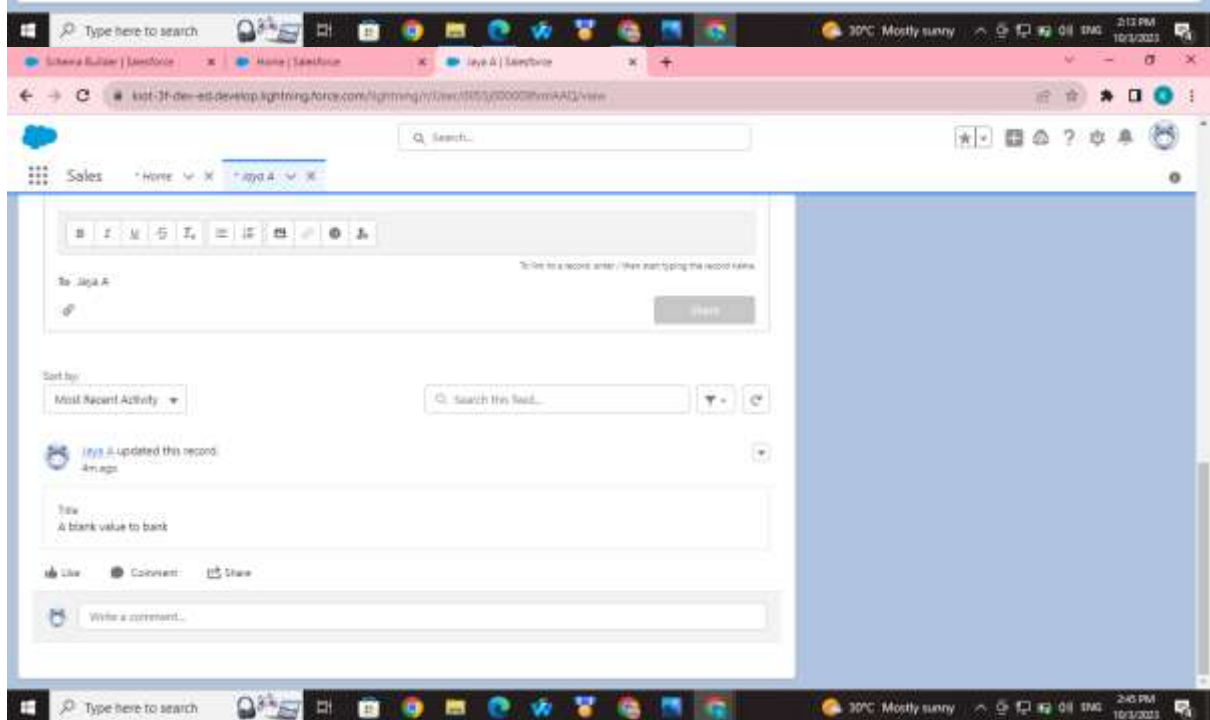
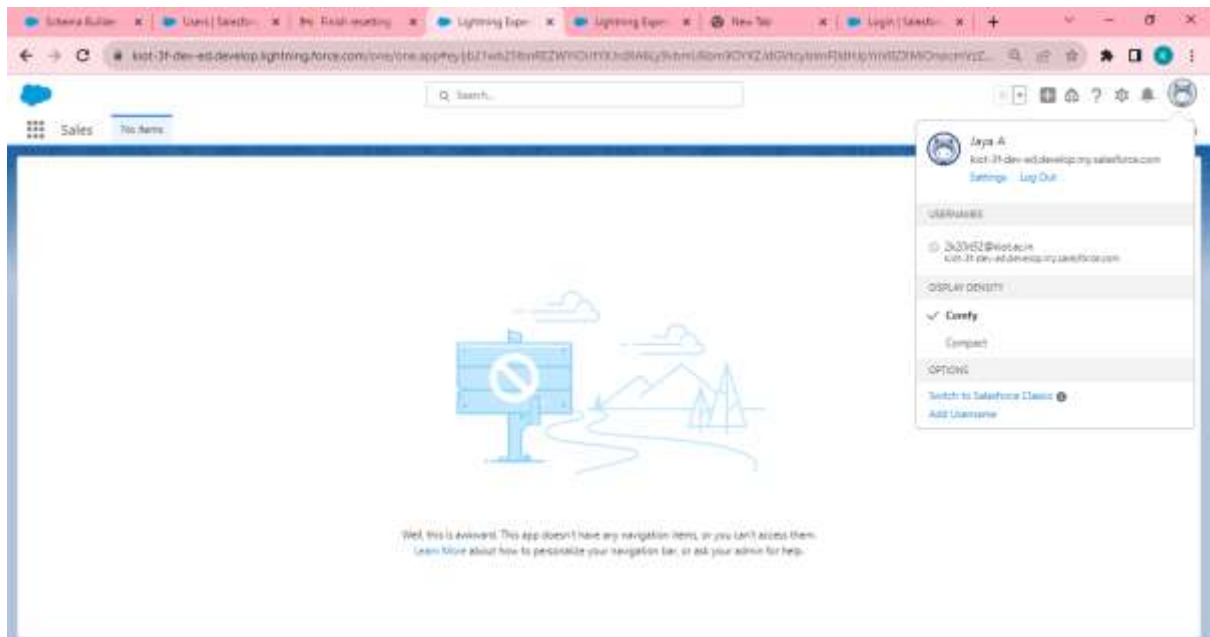
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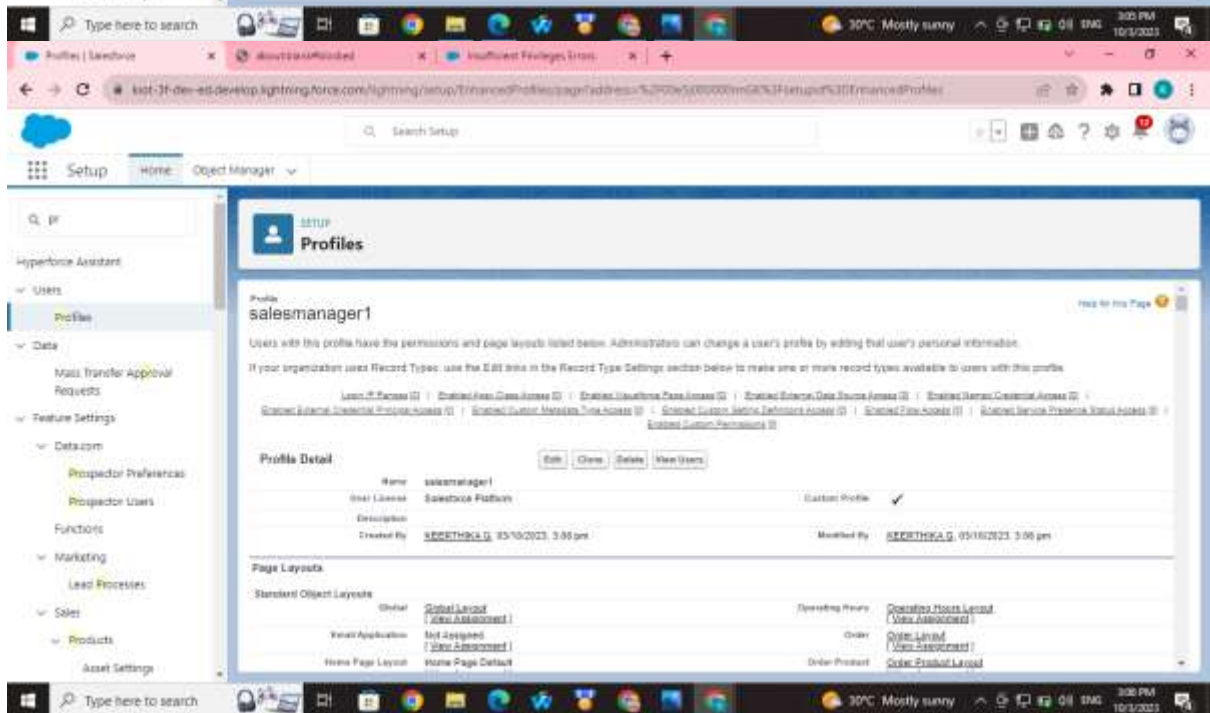
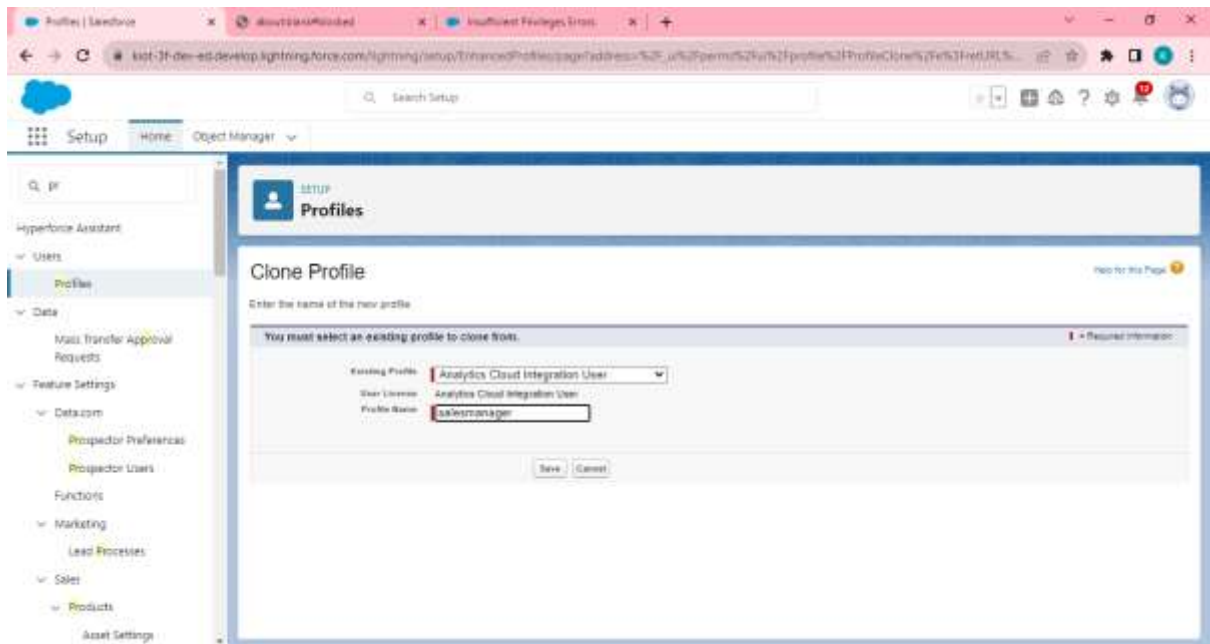
Scale service with Generative AI and Einstein GPT.

Learn how AI and Einstein GPT are bringing intelligence and efficiency to service.

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Profiles | Salesforce | about:unavailable | Insufficient Privileges Error

Search Setup

Setup Home Object Manager

Hyperforce Assistant

Users

Profiles

Data

Mass Transfer Approval Requests

Feature Settings

Data.com

Prospector Preferences

Prospector Users

Functions

Marketing

Lead Processes

Sales

Products

Asset Settings

Profiles

Profile Edit

Name: salesmanager1

User License: Salesforce Platform

Custom Profile: ☒

Custom App Settings

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

Service Provider Access

Profiles | Salesforce | about:unavailable | Insufficient Privileges Error

Search Setup

Setup Home Object Manager

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Mass Transfer Approval Requests

Feature Settings

Data.com

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Prospector Users

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Products

Asset Settings

Profiles

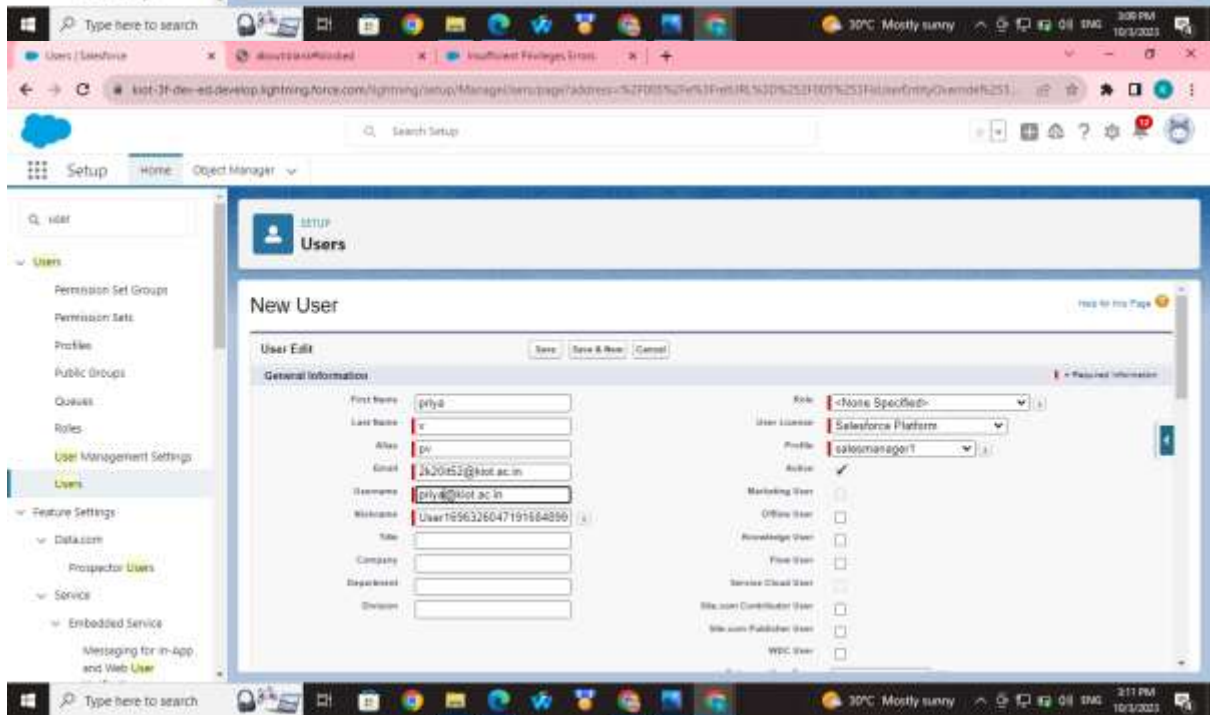
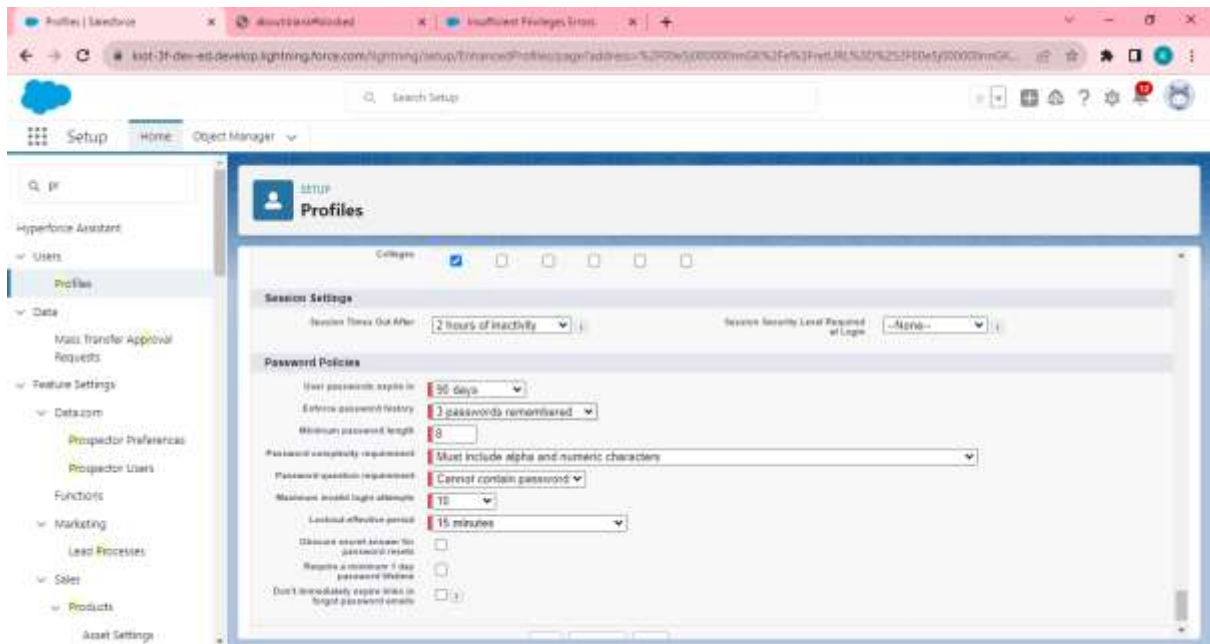
Custom Object Permissions

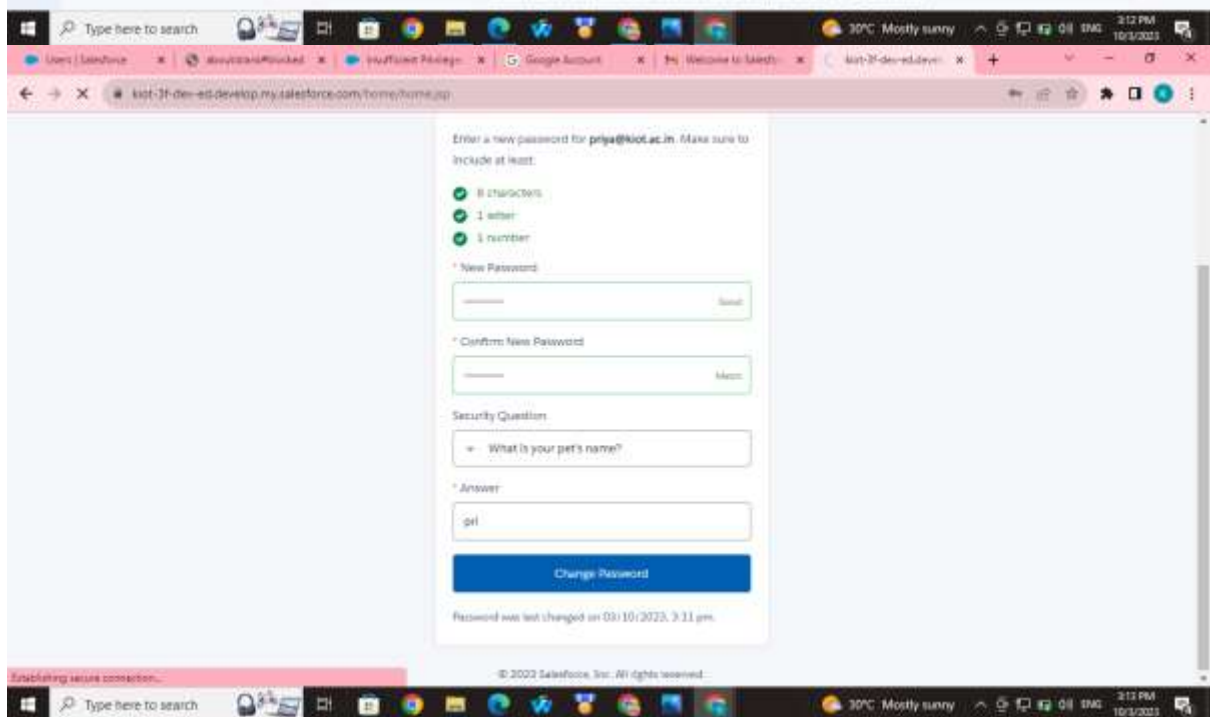
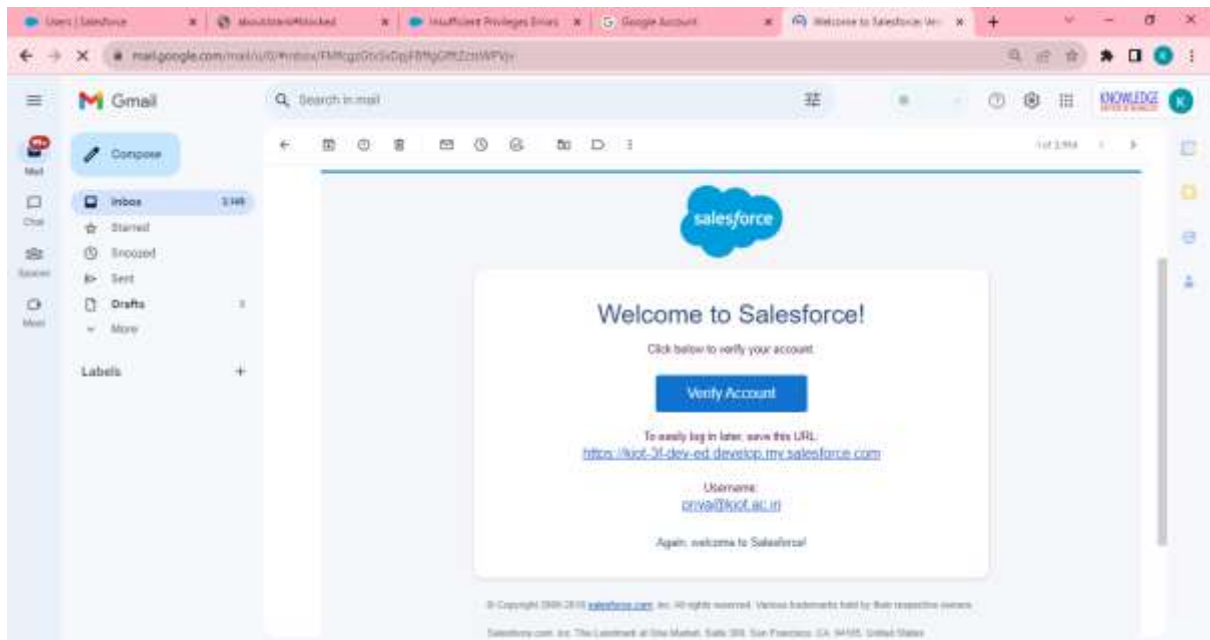
Read	Create	Edit	Delete	View All	Modify All
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>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

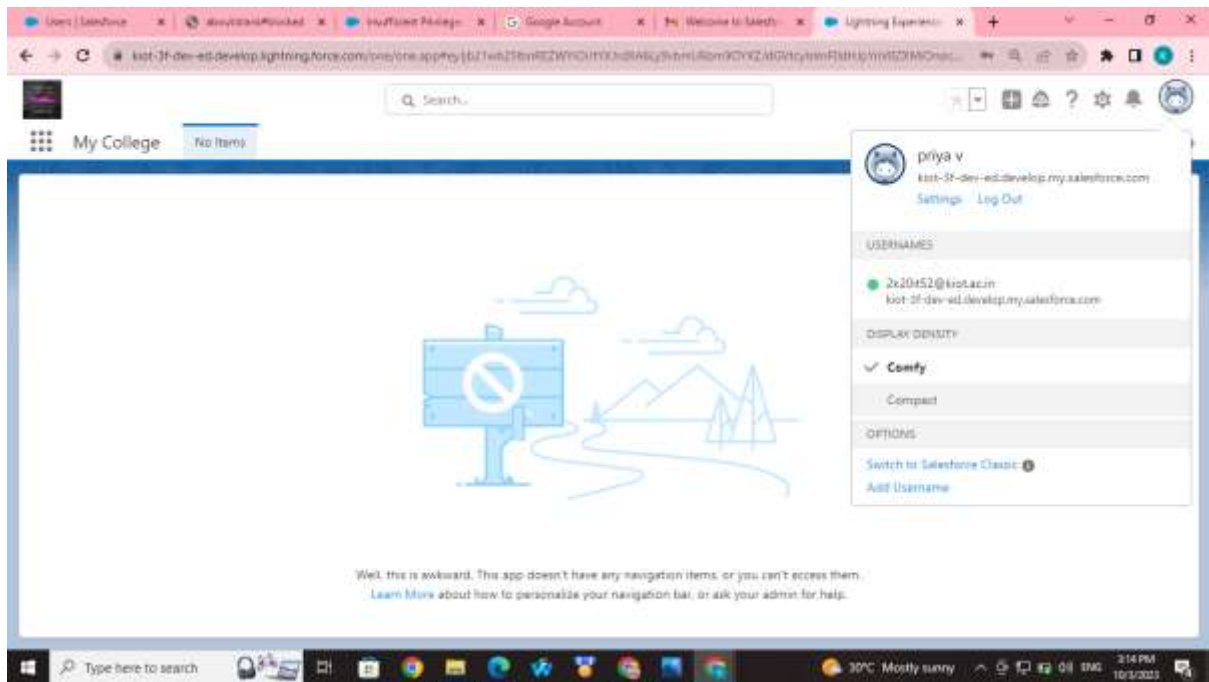
Session Settings

Session Times Out After: 2 hours of inactivity

Password Policies







Step 2:

Permission Sets:

- Create two permission sets, one for manager and one for sales manager.

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-manager and I- sales manager 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 manager with manager and records owned by I sales manager with sales manager.

- For the sharing rule criteria, specify that records owned by manager are shared with user A, and records owned by sales manager are shared with sales manager.

Ownership:

- Ensure that the Account records are owned by the respective users, with manager owning their records and sales manager 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 manager and sales manager separately to verify that they cannot access each other's records.

Permission Sets | Salesforce | Lightning Experience | Salesforce | Login | Salesforce

Search Setup

Setup Home Object Manager

per

Hyperforce Assistant

Lightning Experience Transition Assistant

Users

Permission Set Groups

Permission Sets

Feature Settings

Digital Experiences

Settings

Functions

Sales

Accounts

Person Accounts

Salesforce Scheduler

Permission Sets

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

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

All Permission Sets | Edit | Delete | Create New View

Action	Permission Set Label	Description	License
<input type="checkbox"/> Clone	Buyer	Allows access to the store. Lets users see product...	B2B Buyer Permission Set One Seat
<input type="checkbox"/> Clone	Buyer Manager	Includes all Buyer capabilities, and allows access t...	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/> Clone	CRM User	Denotes that the user is a Sales Cloud or Service...	CRM User
<input type="checkbox"/> Clone	Commerce Admin	Allow access to commerce admin features.	Commerce Admin Permission Set License Seat
<input type="checkbox"/> Clone	Contact Center Admin	Manage Service Cloud Voice contact centers that...	Service Cloud Voice User
<input type="checkbox"/> Clone	Contact Center Agent	Access agent features in Service Cloud Voice cont...	Service Cloud Voice User

1-25 of 28 0 Selected 4 Previous Next

Page 1 of 2

Permission Sets | Salesforce | Lightning Experience | Salesforce | Login | Salesforce

Search Setup

Setup Home Object Manager

per

Hyperforce Assistant

Lightning Experience Transition Assistant

Users

Permission Set Groups

Permission Sets

Feature Settings

Digital Experiences

Settings

Functions

Sales

Accounts

Person Accounts

Salesforce Scheduler

Permission Set Create

Save Cancel

Enter permission set information

Label

API Name

Description

Session Activation Required: ☐

Select the type of users who will use this permission set

Who will use this permission set?

-Choose --None-- if you plan to assign this permission set to multiple users with different user and permission set licenses

Permission Sets | Salesforce | Lightning Experience | Salesforce | Login | Salesforce

Search Setup

Setup Home Object Manager

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Hyperforce Assistant
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Users
Permission Set Groups
Permission Sets
Feature Settings
Digital Experiences
Settings
Functions
Sales
Accounts
Person Accounts
Salesforce Scheduler

SETUP Permission Sets

Permission Set: salesmanager1

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

Permission Set Overview

Description: License

API Name: salesmanager1

Namespace Prefix:

Session Activation Required: ☐

Created By: KSEETHIKA Q. 03/10/2023, 2:28 pm

Last Modified By: KSEETHIKA Q. 03/10/2023, 2:28 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.

Permission Sets | Salesforce | Permission Sets | Salesforce | Lightning Experience | Salesforce | Login | Salesforce

Search Setup

Setup Home Object Manager

Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users

> Data
> Email
PLATFORM TOOLS
> Subscription Management
> Apps
> Feature Settings
> Slack
> MuleSoft

SETUP Permission Sets

Permission Set: salesmanager1

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	43	---
AI Insight Reasons	No Access	---	---
AI Recent Insights	No Access	---	---
Alternative Payment Methods	No Access	27	---
API Approval Event Store	No Access	14	---
App Analytics Query Requests	No Access	---	---
Appointment Usable Assignments	No Access	---	---
Appointment Categories	No Access	3	---
Appointment Invitations	No Access	17	---

Permission Sets | Salesforce x Permission Sets | Salesforce x Lightning Experience | Salesforce x Login | Salesforce x +

Search Setup

Setup Home Object Manager

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Data

Email

PLATFORM TOOLS

Subscription Management

Apps

Feature Settings

Slack

MuleSoft

Erstein

SETUP

Permission Sets

Permission Set: salesmanager1

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

Permission Set Overview | Object Settings | books

books

Edit

Tab Settings

Available	Visible
<input type="checkbox"/>	<input checked="" type="checkbox"/> (4)

Object Permissions

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

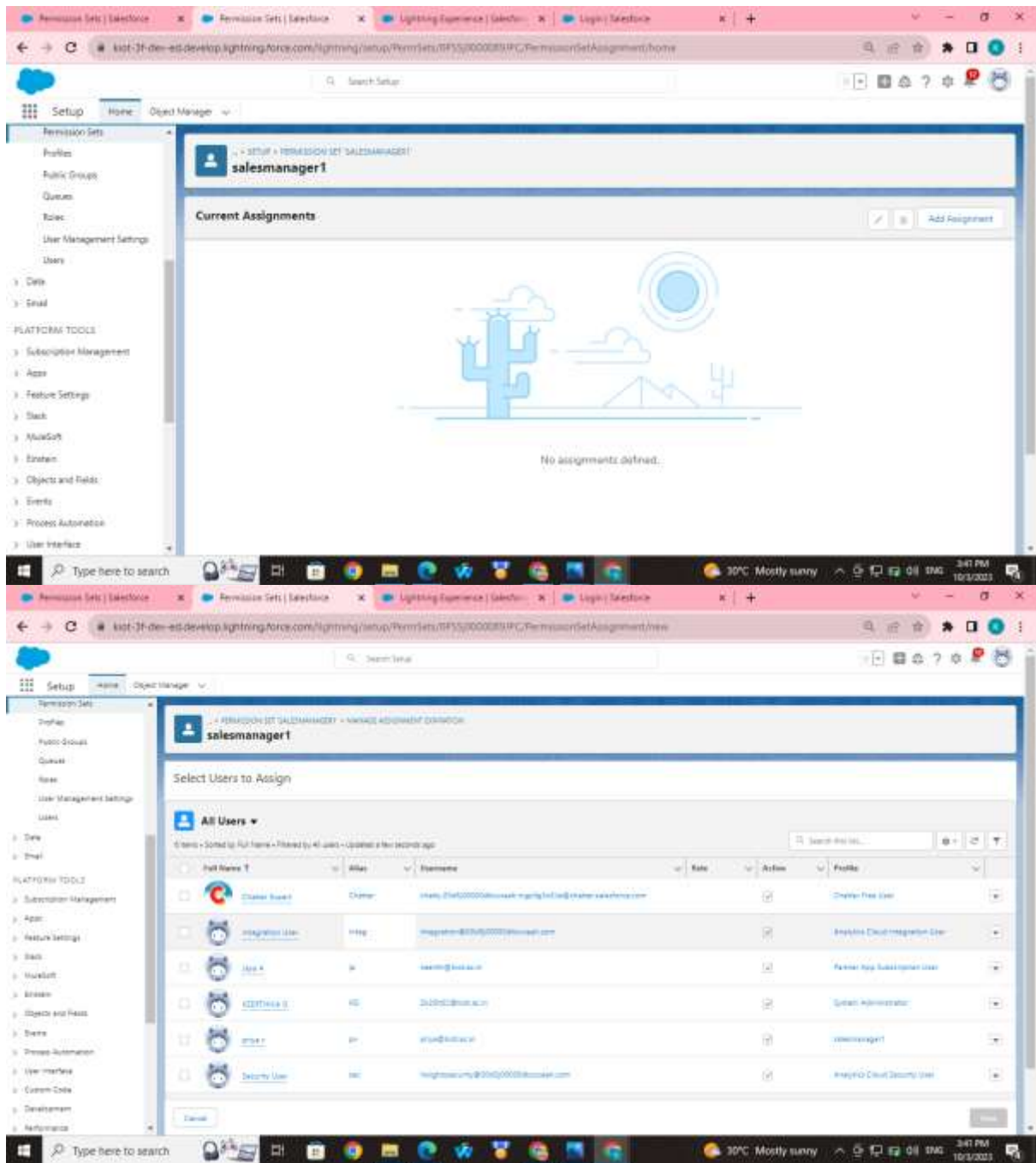
Field Permissions

Field Name	Read Access	Edit Access
book name	<input type="checkbox"/>	<input type="checkbox"/>
Created By	<input type="checkbox"/>	<input type="checkbox"/>

Type here to search

30°C Mostly sunny

3:40 PM 10/3/2023



Permission Sets | Salesforce | Lightning Experience | Setup | User Management Settings | Users

Select an Expiration Option For Assigned Users

☒ No expiration date
☐ Specify the expiration date

Time Zone:

Selected Users

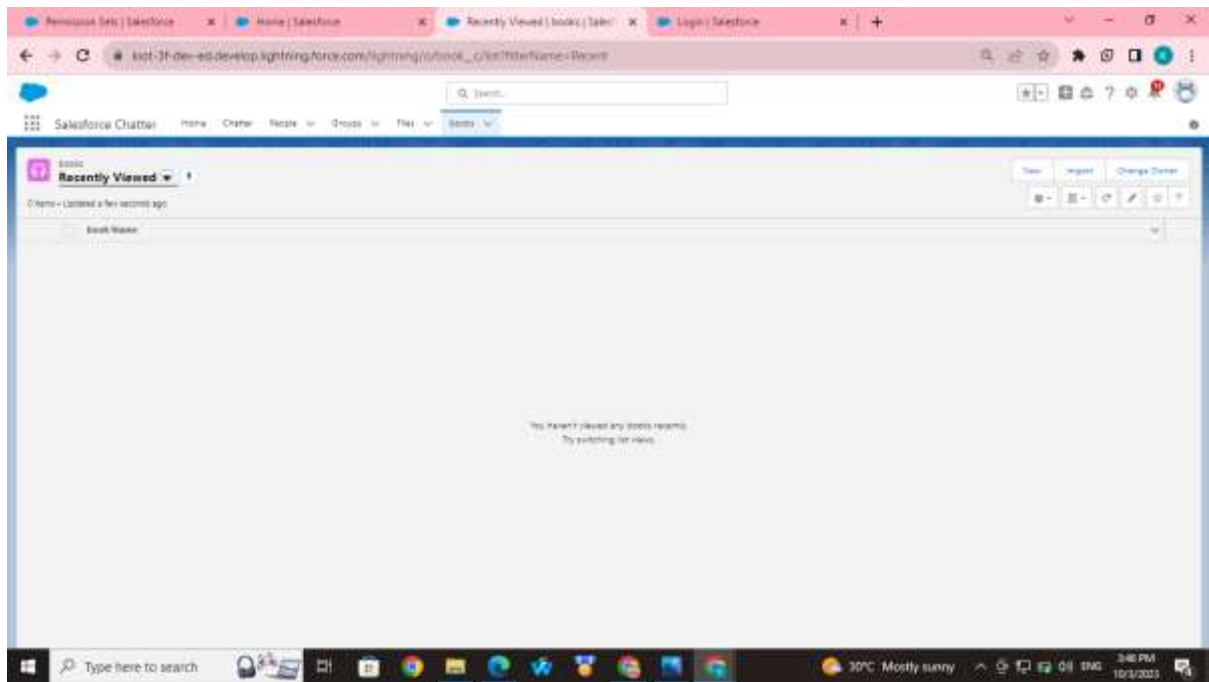
Full Name	Role	Profile	Active	User License	Expires On
gpkc1		salesmanager1	<input checked="" type="checkbox"/>	Salesforce Platform	Never Expires

Permission Sets | Salesforce | Lightning Experience | Setup | User Management Settings | Users

salesmanager1

Assignment Summary

Full Name	User License	Expires On	Time Zone	Status
gpkc1	Salesforce Platform			Success

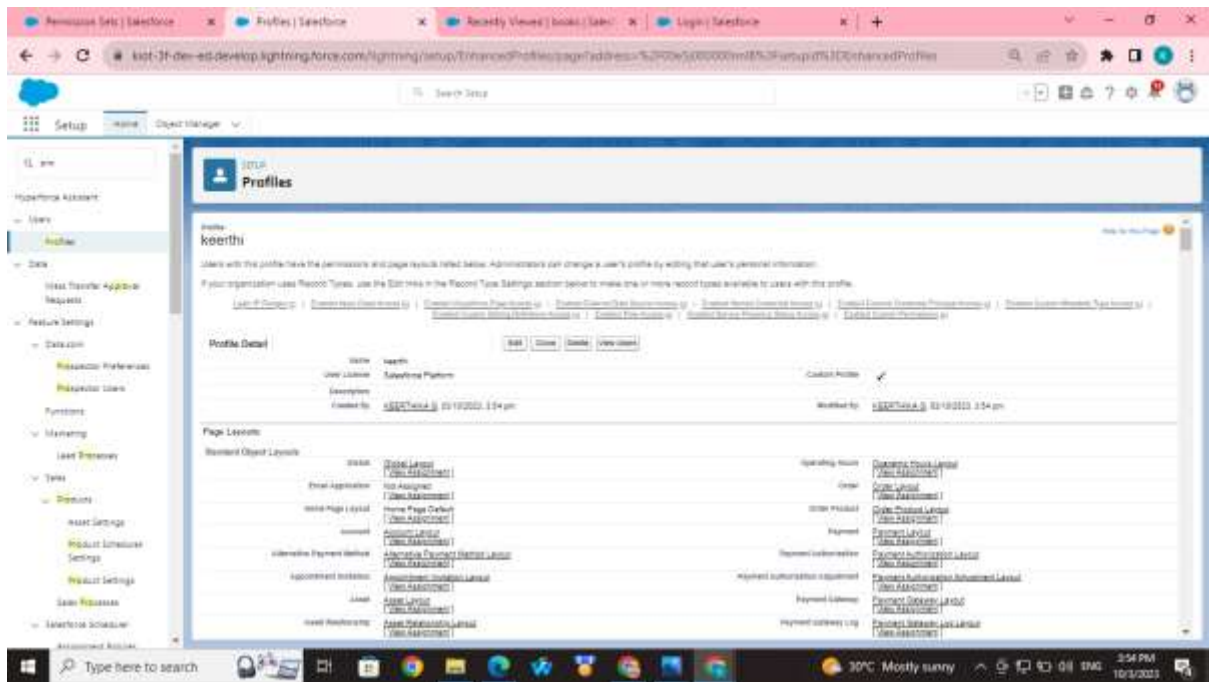


3. Suppose there are 2 Users and they are having Create, Read, Edit access on Account Object with the same profile but we want to open up the access for one user to delete how will you implement the Security setting.

Solution:

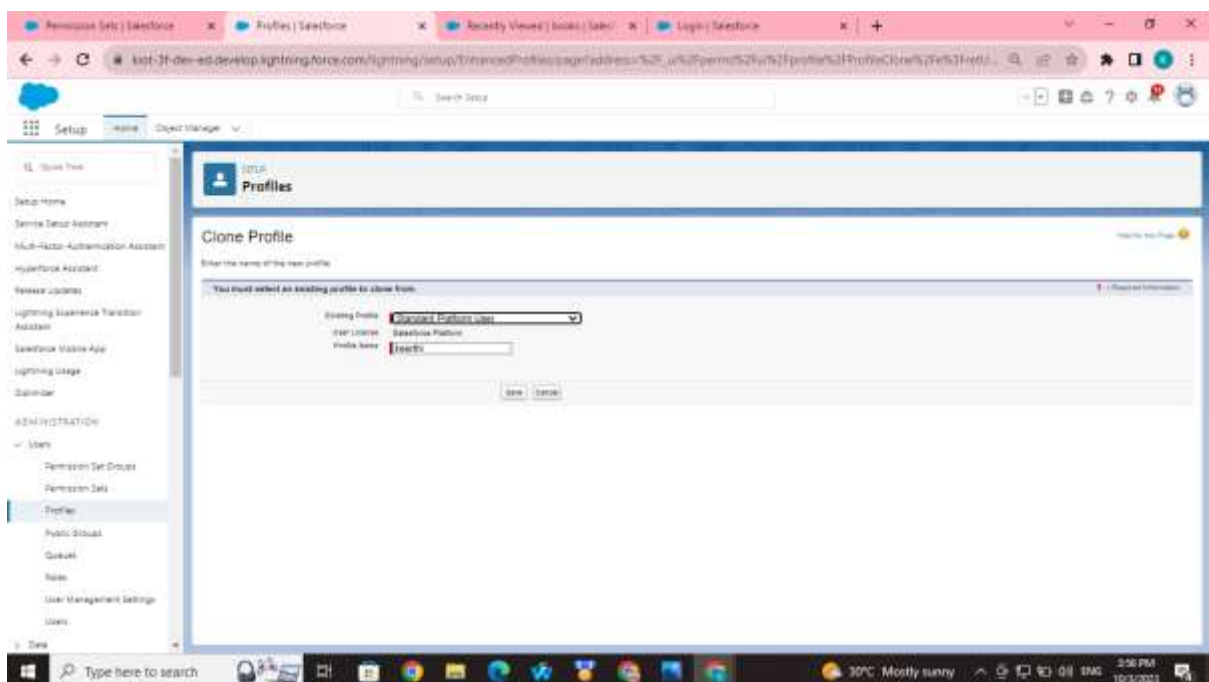
Step 1: we need create a profile for the two user which has the access to Create, Read, Edit for follow as per.

Setup-quick search[profile]

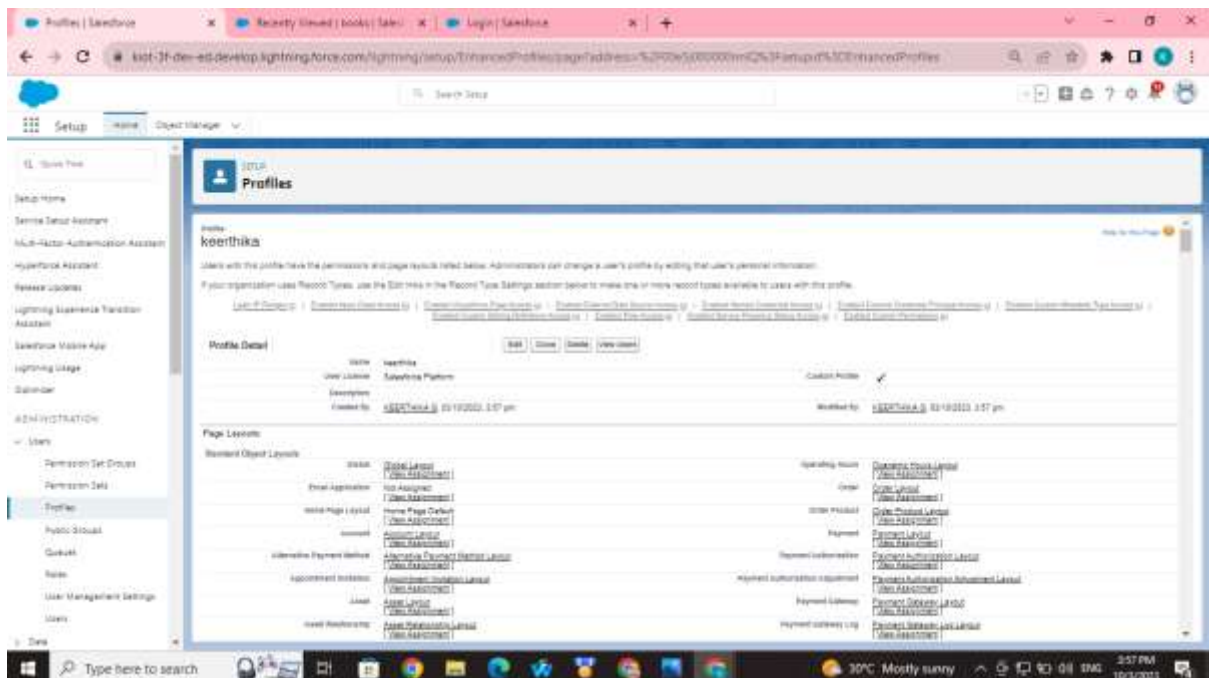


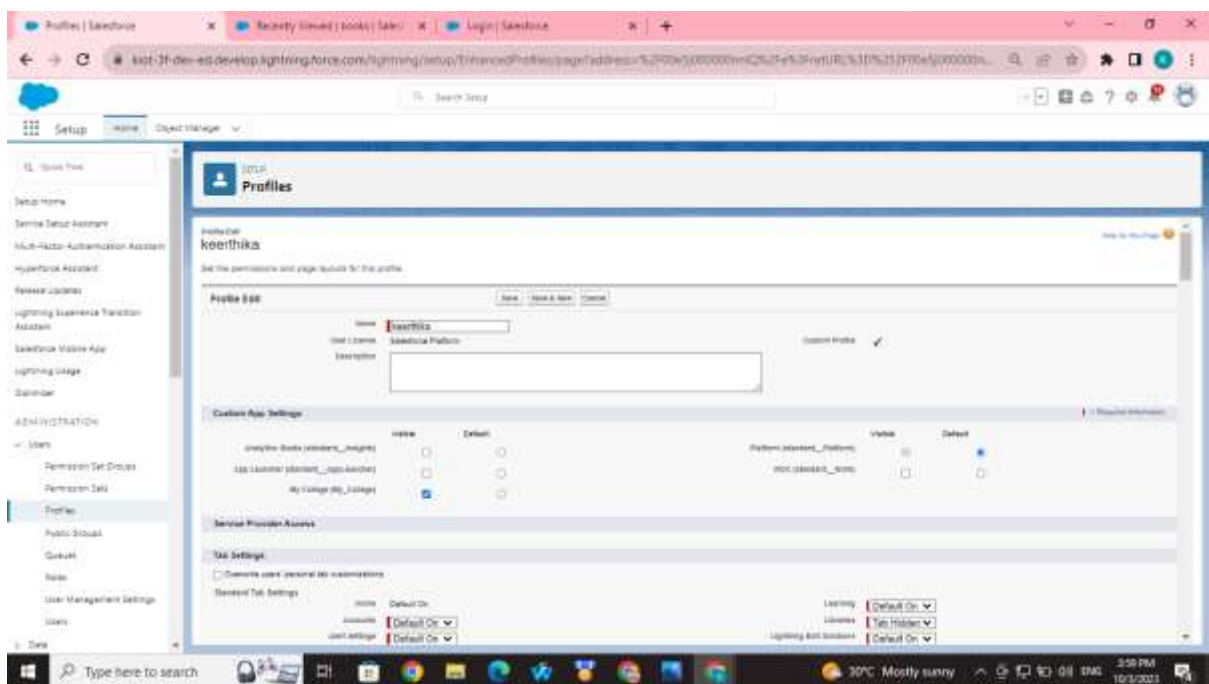
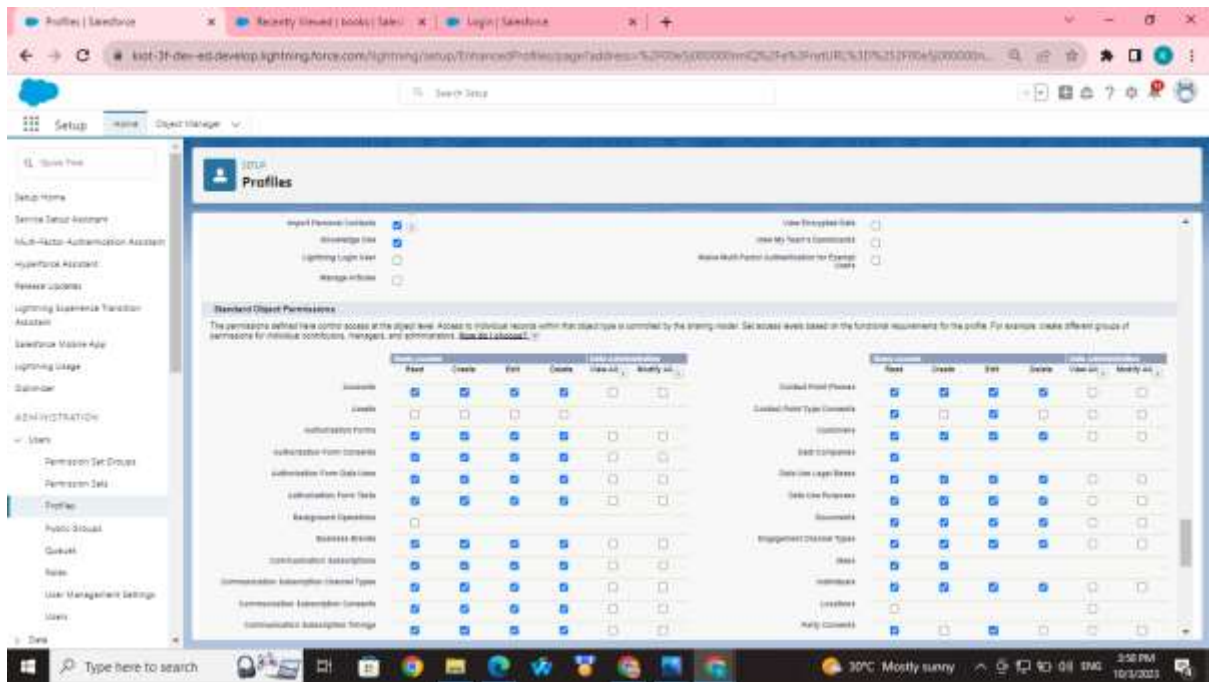
Step 2:

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



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.

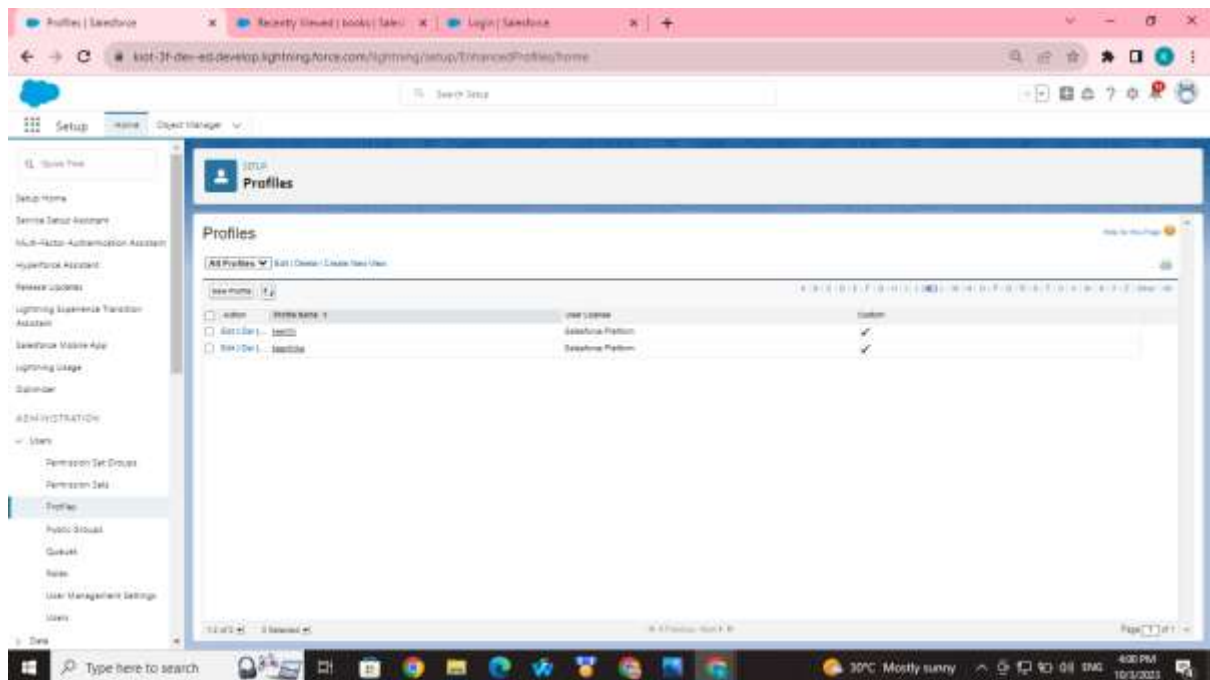




Step 4

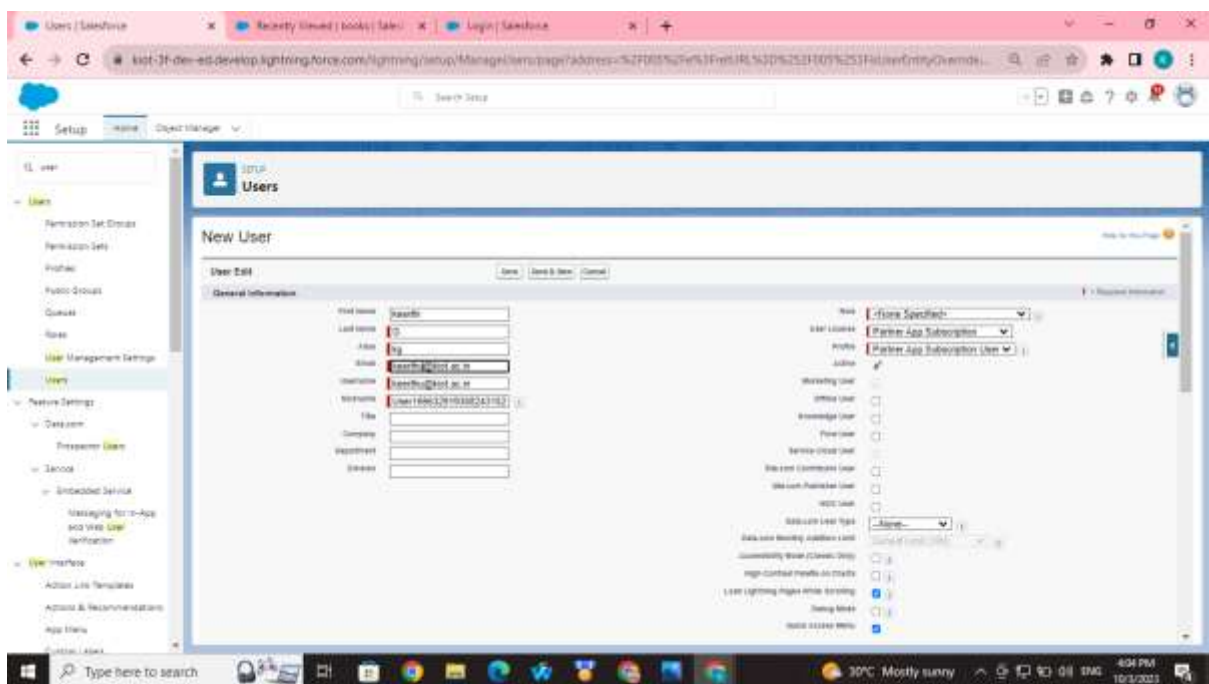
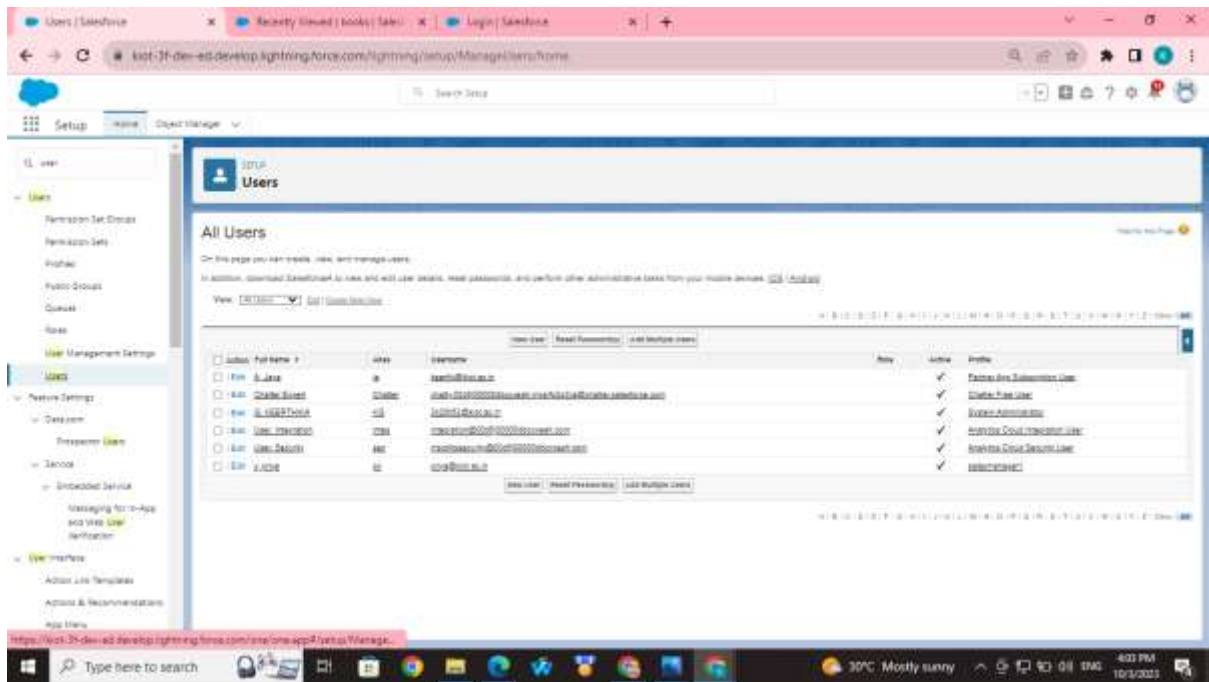
Now you can preview your created profile on the profile option here my profile name jaga has been

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 user are create click on save.

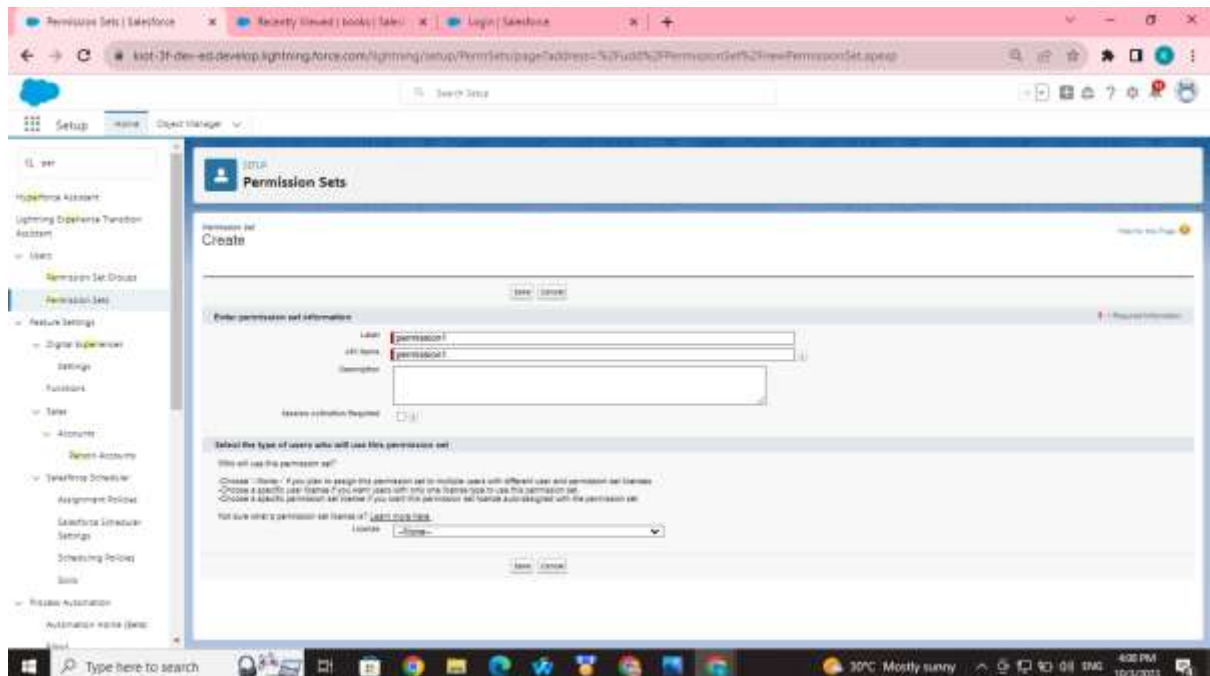


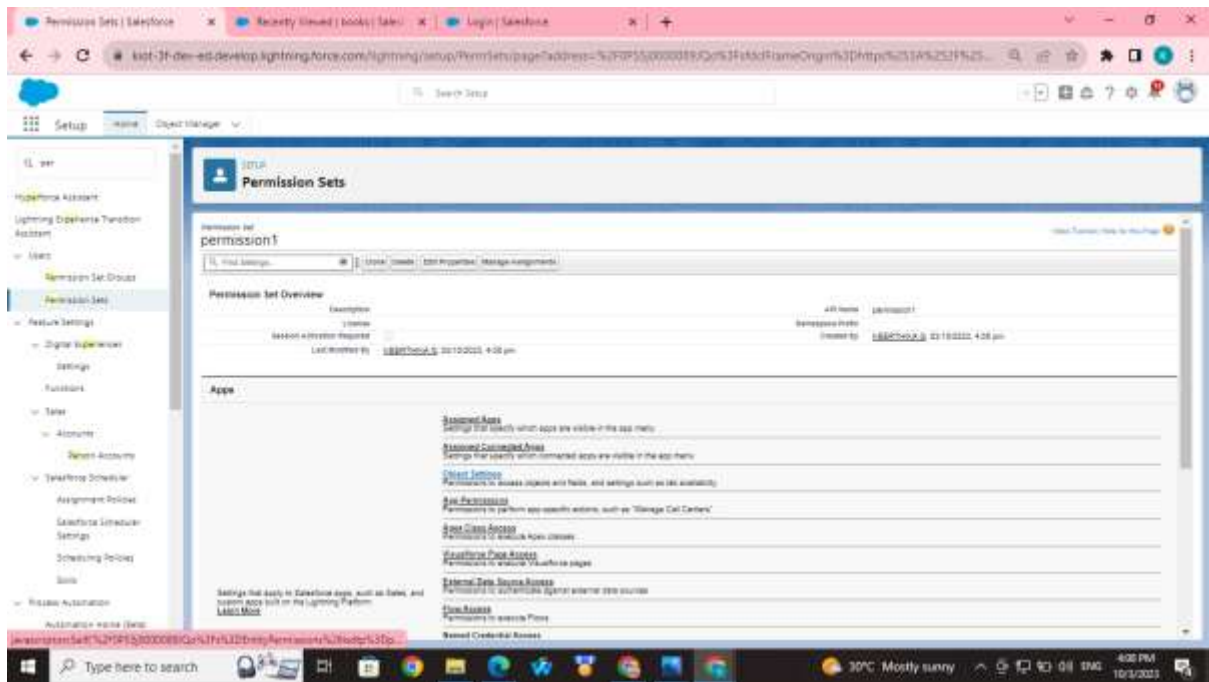
Now you can preview your two user that you have created in my side I had create the two users a Jagadesh11 and Jagadesh22 as a director channel sales with the marketing team.

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.





Step 7:

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

Permission Sets | Salesforce x Recently Viewed | Tools | Sales | Login | Salesforce

https://test-3f-dev-ed.develop.lightning.force.com/lightning/setup/permsets/page/address=52P0P550000187Qzr53DEntityPermission%26r53DAccount

Setup Home Object Manager

11 ver

MyProfile Account

Lightning Experience Transition Assistant

Users

Permission Set Groups

Permission Sets

Feature Settings

Digital Experience

Settings

Functions

Tales

Accounts

Open Account

Transfer/Stop Scheduler

Assignment Rules

Salesforce Scheduler

Settings

Scheduling Policy

Skills

Profile Automation

Automation Studio (Beta)

Setup

Permission Sets

permission f

11, 100 Settings Update Create Edit Properties Manage Assignments

Permission Set Overview Object Settings Assignments

Accounts

Object Permissions

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

Field Permissions

Field Name	Read Access	Edit Access
Account Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Account Number	<input type="checkbox"/>	<input type="checkbox"/>
Account Owner	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Account Site	<input type="checkbox"/>	<input type="checkbox"/>
Account Source	<input type="checkbox"/>	<input type="checkbox"/>
Name	<input type="checkbox"/>	<input type="checkbox"/>
Annual Revenue	<input type="checkbox"/>	<input type="checkbox"/>
Billing Address	<input type="checkbox"/>	<input type="checkbox"/>

https://test-3f-dev-ed.develop.lightning.force.com/lightning/setup/permsets/page/address=52P0P550000187Qzr53DEntityPermission%26r53DAccount

Type here to search

30°C Mostly sunny 08:19 10/3/2023

Permission Sets | Salesforce x Recently Viewed | Tools | Sales | Login | Salesforce

https://test-3f-dev-ed.develop.lightning.force.com/lightning/setup/permsets/page/address=52P0P550000187Qzr53DEntityPermission%26r53DAccount

Setup Home Object Manager

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Skills

Profile Automation

Automation Studio (Beta)

Setup

Permission Sets

permission f

11, 100 Settings Update Create Edit Properties Manage Assignments

Permission Set Overview Object Settings Assignments

Accounts

Object Permissions

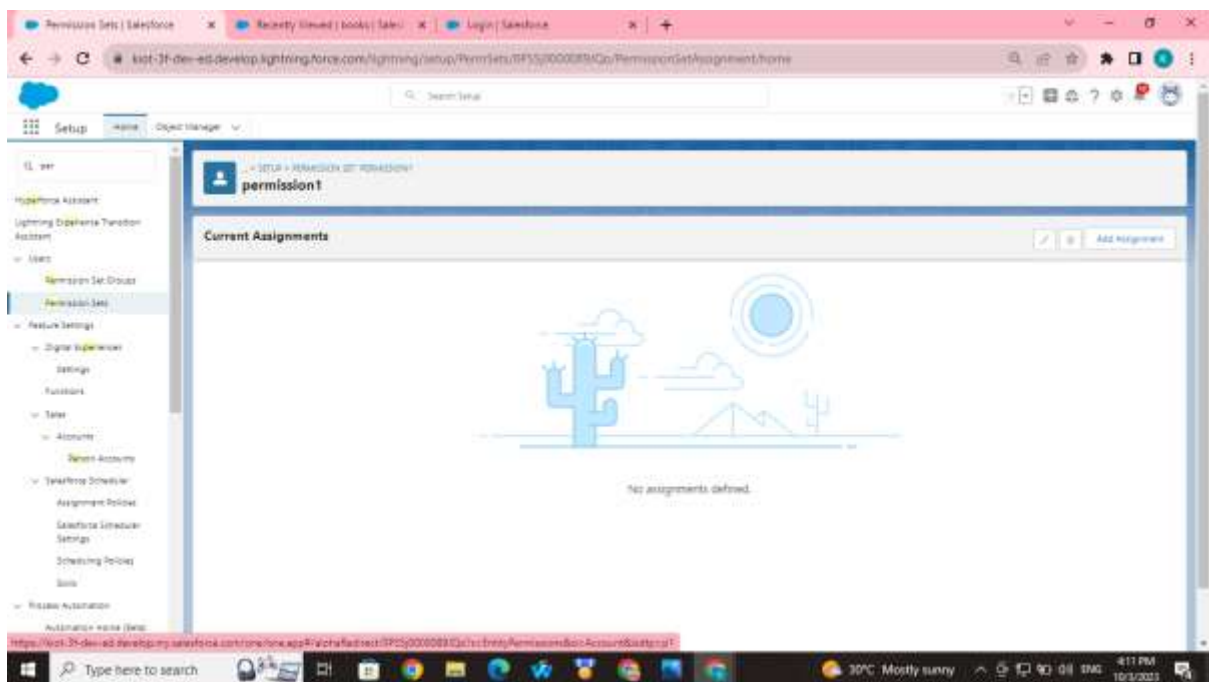
Permission Name	Enabled
Read	<input checked="" type="checkbox"/>
Create	<input checked="" type="checkbox"/>
Edit	<input checked="" type="checkbox"/>
Delete	<input checked="" type="checkbox"/>
View All	<input type="checkbox"/>
Modify All	<input type="checkbox"/>

Field Permissions

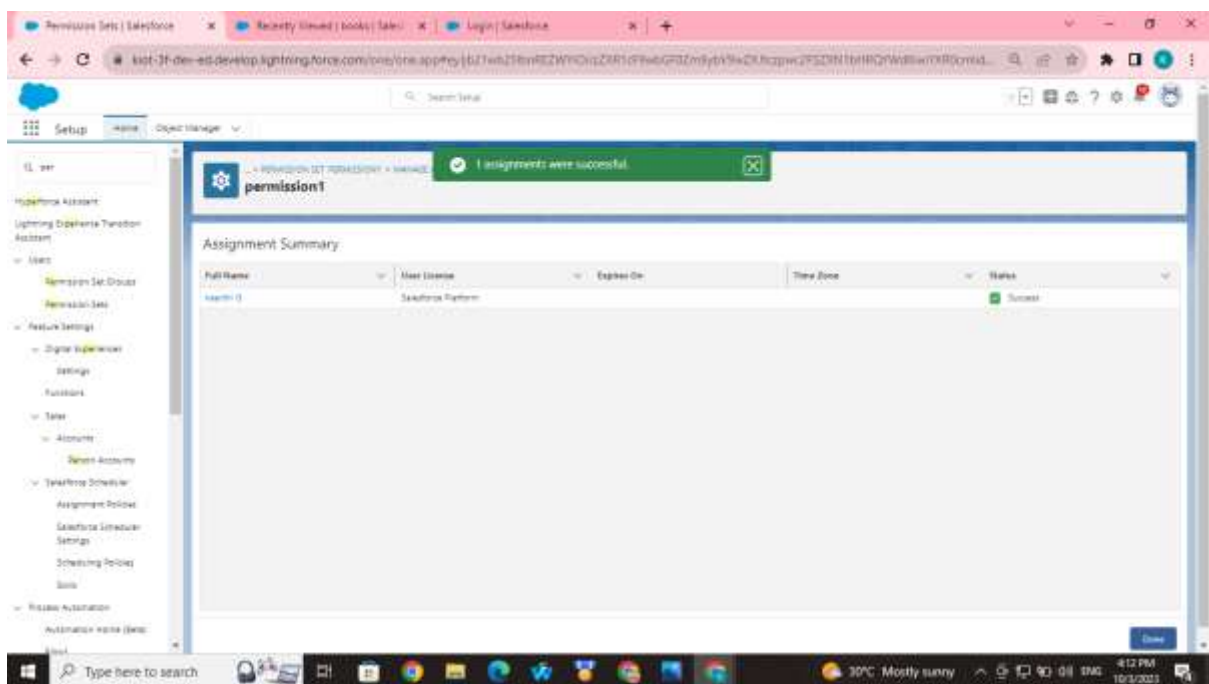
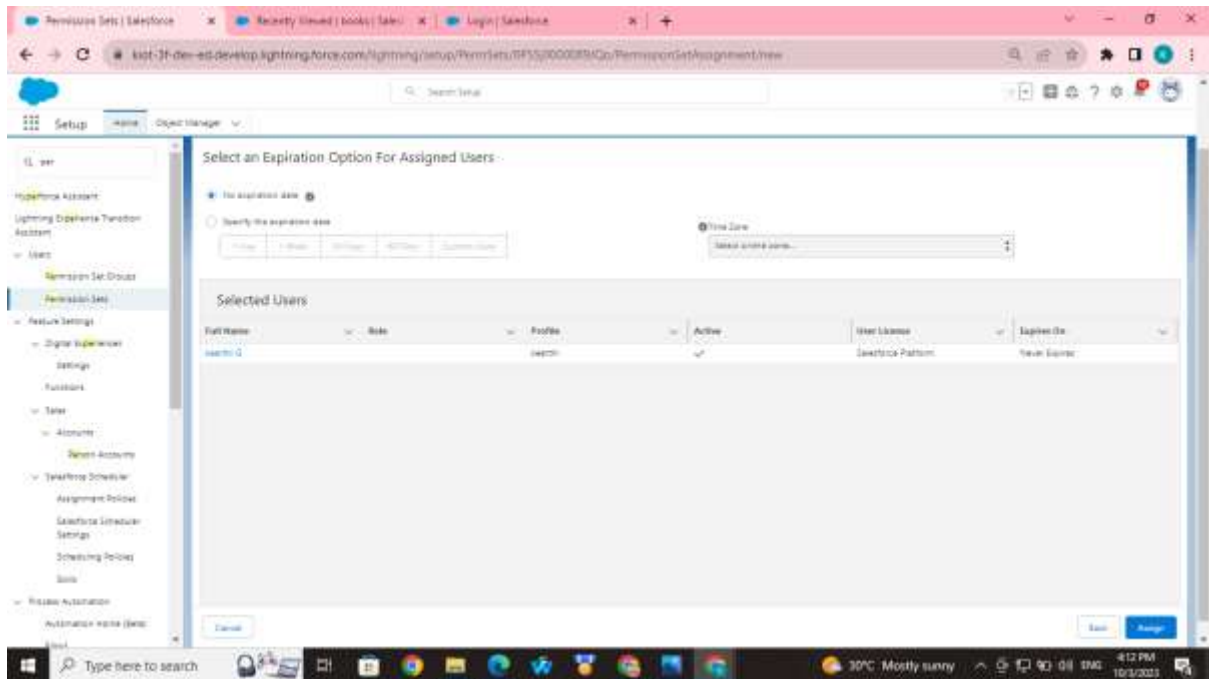
Field Name	Read Access	Edit Access
Account Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Account Number	<input type="checkbox"/>	<input type="checkbox"/>
Account Owner	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Account Site	<input type="checkbox"/>	<input type="checkbox"/>
Account Source	<input type="checkbox"/>	<input type="checkbox"/>
Name	<input type="checkbox"/>	<input type="checkbox"/>
Annual Revenue	<input type="checkbox"/>	<input type="checkbox"/>
Billing Address	<input type="checkbox"/>	<input type="checkbox"/>

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.



Now click on Assign.



Now the specific access for the Jagadesh11 user has been assigned successfully.

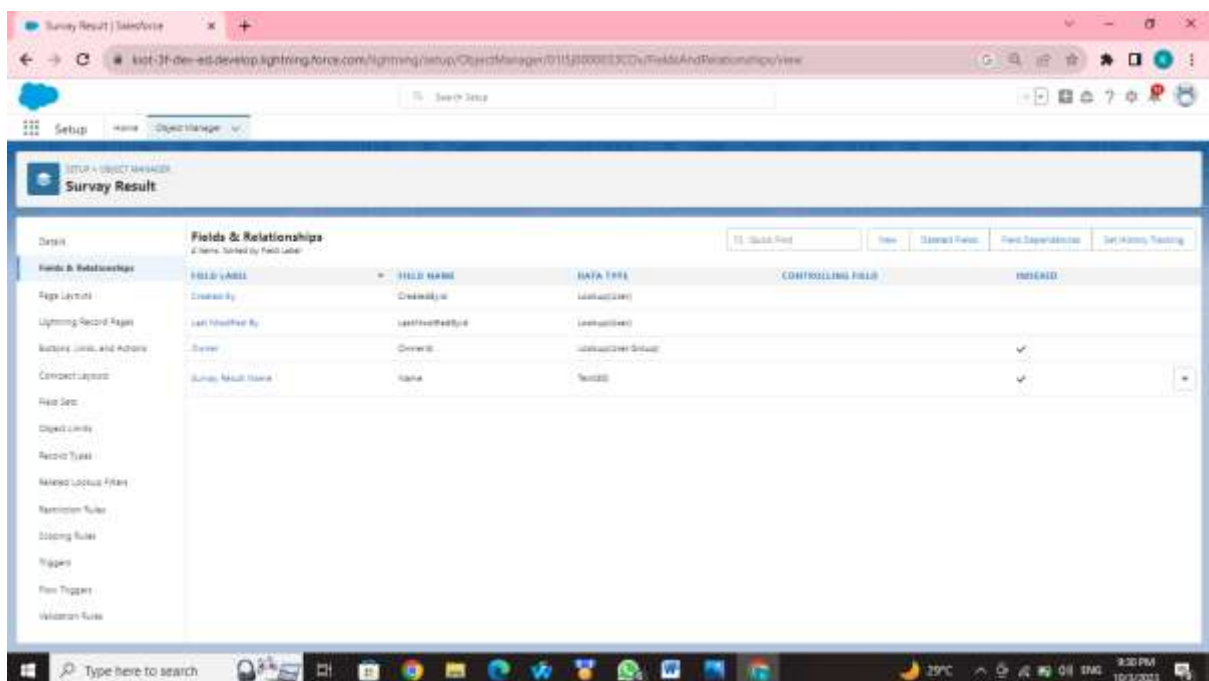
4. Create a screen flow for a basic survey to fill in the details for any form.

Solution:

Step 1: Create a Custom Object

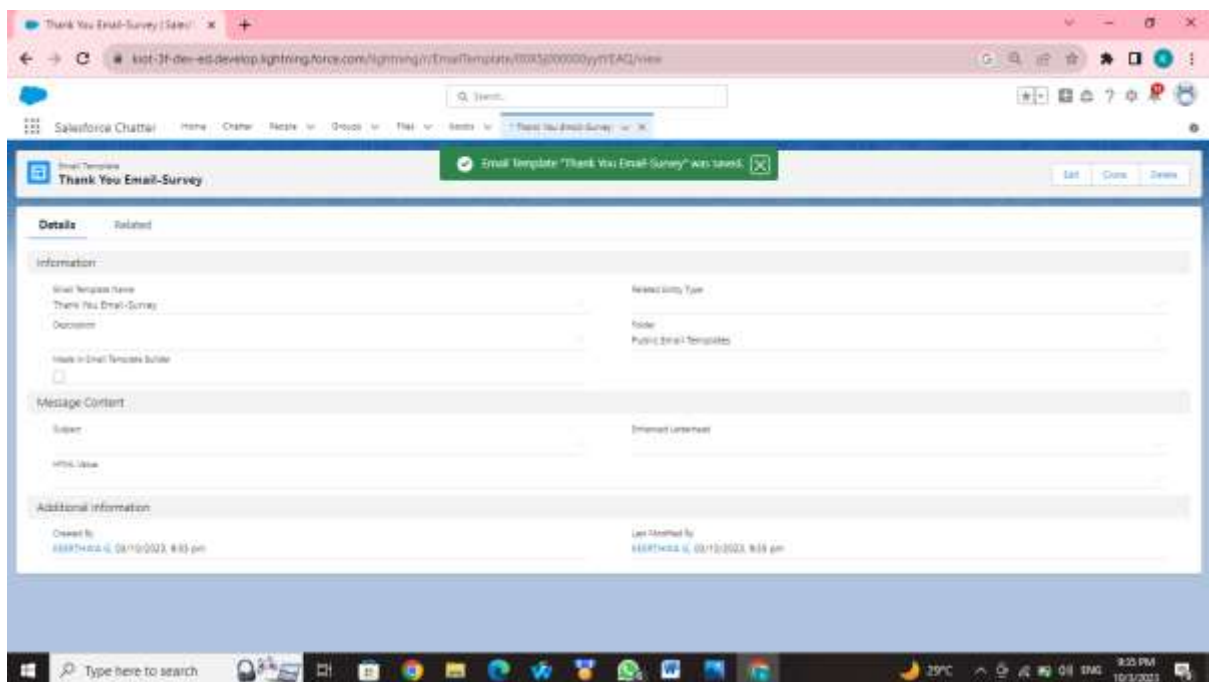
The next step is to create a custom object **Survey Result** and a few custom fields to store survey responses.

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**.



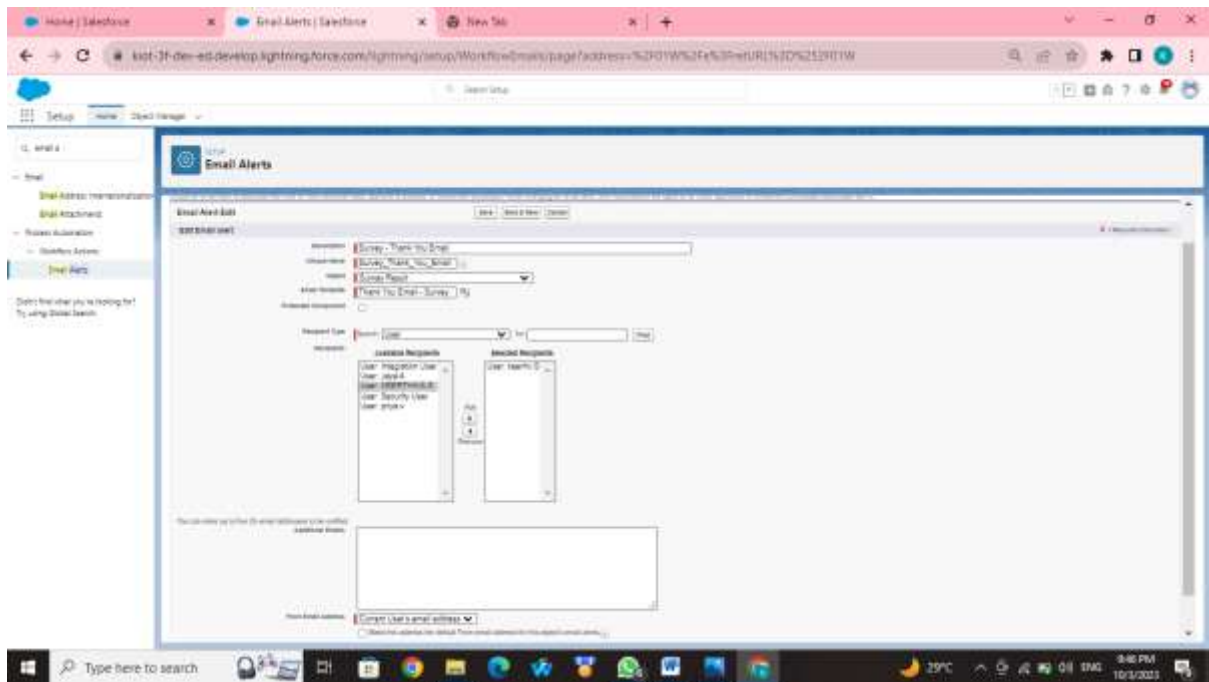
Step 2: Create a Thank You For Survey Lightning Email Template

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.



Step 3: Create an Email Alert

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



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

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

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

1. Drag-and-drop the **Create Records** element onto the Flow designer.
2. Enter a name in the **Label (Save Response)** field; the **API Name** will auto-populate.
3. For **How Many Records to Create** – select **One**.
4. For **How to Set the Record Fields** – select **Use separate resources, and literal values**.
5. Select the **Survey Result** 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". It contains a text area for a description, a "Set Input Values" section with a field for "Record ID" set to "{!Save_Response}", and "Cancel" and "Done" buttons at the bottom right.

Use values from earlier in the flow to set the inputs for the "Survey - Thank You Email" email alert. To use its outputs later in the flow, store them in variables.

* Label: Send Thank You Email

* API Name: Send_Thank_You_Email

Description:

Set Input Values

A₃ * Record ID: {!Save_Response}

Cancel Done

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



1. Click **Save**.

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

Save as

A New Version

A New Flow

* Flow Label

Survey

* Flow API Name

Survey

Description

Hide Advanced

How to Run the Flow

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

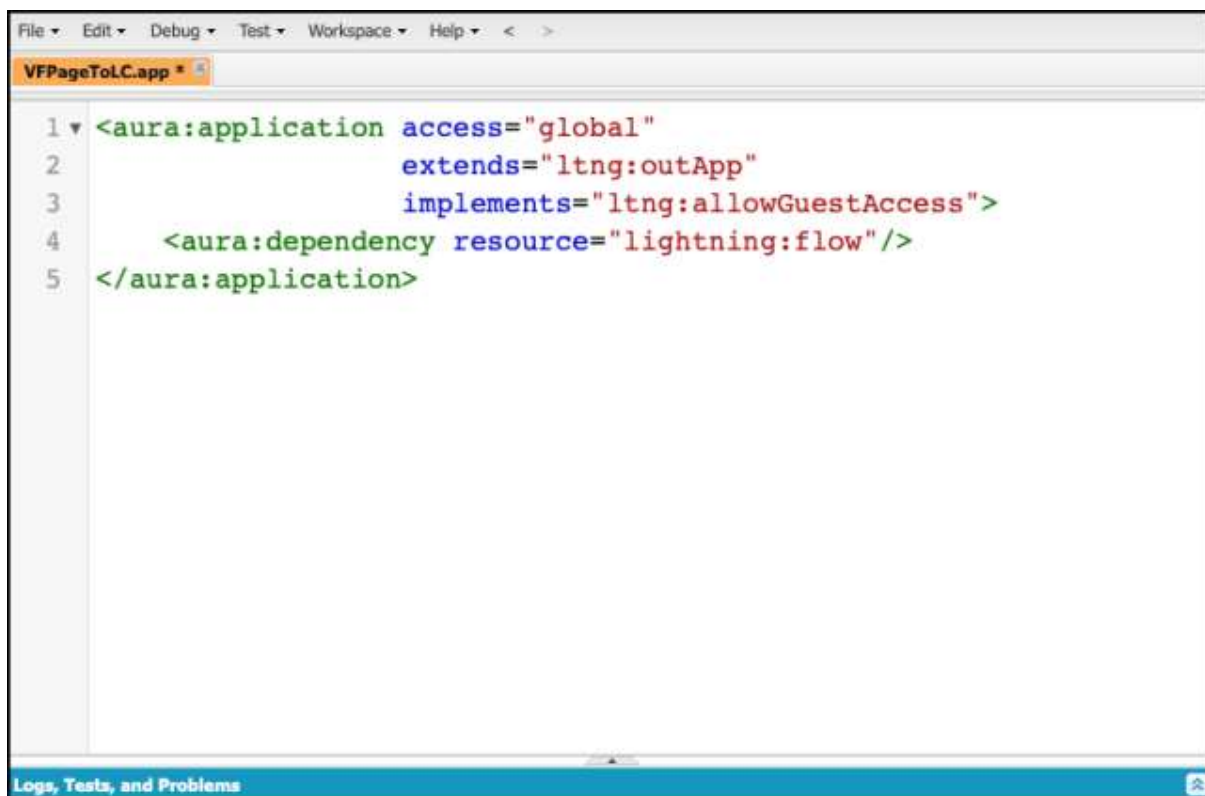
Save

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 'VFPPageToLC.app'. The code editor shows the following XML code:

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

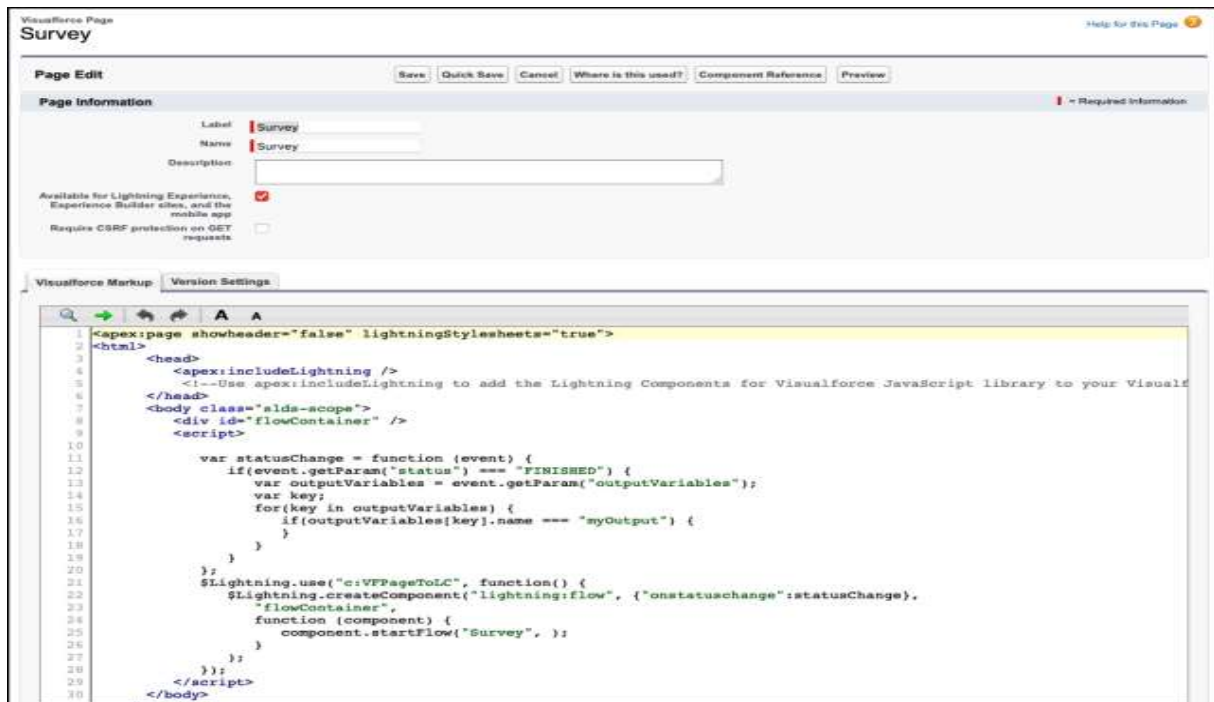
The code is color-coded: green for tags, blue for attributes, and red for values. The bottom status bar indicates 'Logs, Tests, and Problems'.

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**.



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

SaveCancel

Site Label

Survey

i

Site Name

Survey

i

Site Description

Site Contact

Rakesh Gupta

i

Default Record Owner

Rakesh Gupta

i

Default Web Address

http://katiyar-developer-edition.gus.force.com/ survey

i

Active

☒

i

Active Site Home Page

Survey

[Preview]

Inactive Site Home Page

InMaintenance

[Preview]

Site Template

SiteTemplate

i

Site Robots.txt

Site Favorite Icon

Analytics Tracking Code

i

URL Rewriter Class

i

Enable Feeds

☐

Clickjack Protection Level

Allow framing by the same origin only (Recommended)

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.

