SALESFORCE DEVELOPER (NAAN MUDHALVAN)

ASSIGNMENT 1

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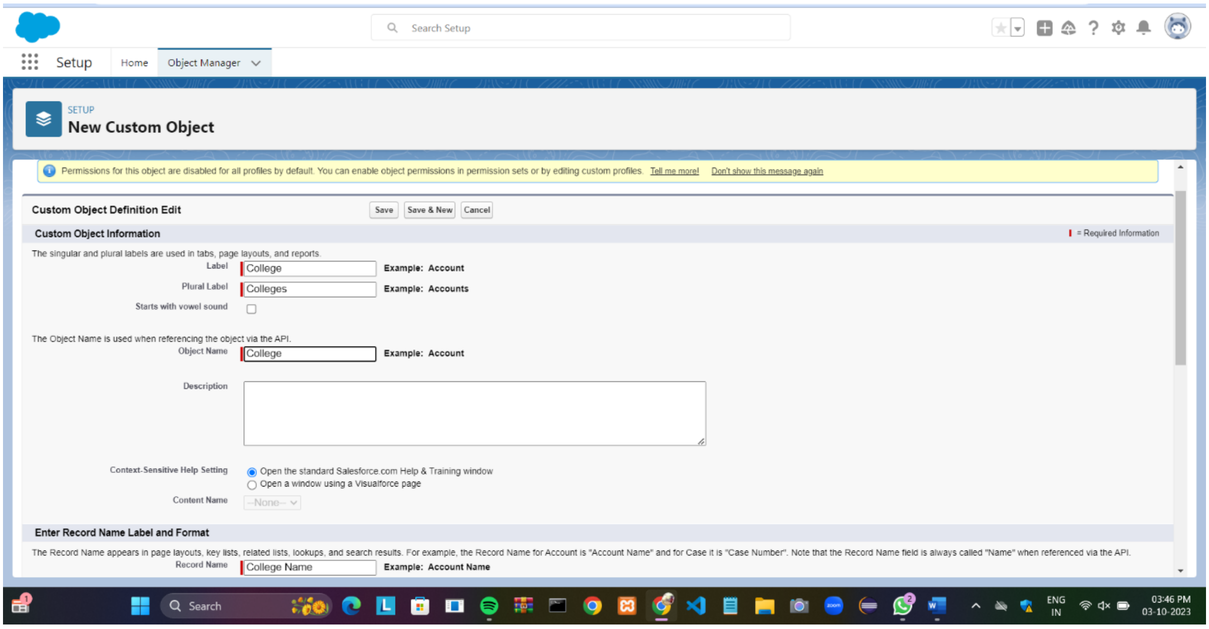
NM ID: AU611220205033

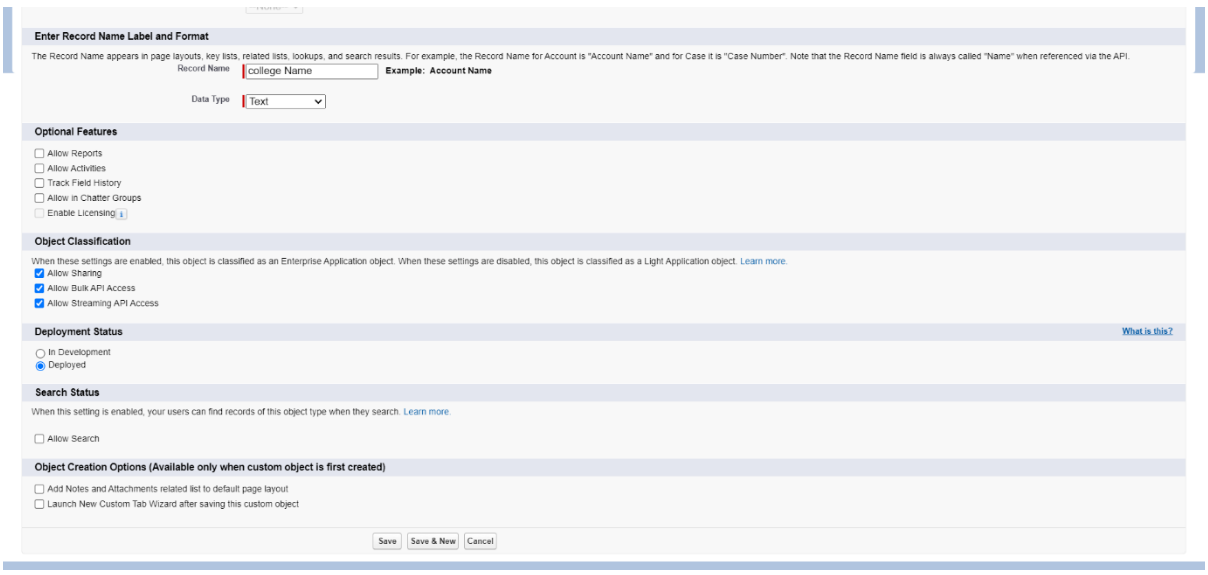
BRANCH : B.TECH IT – IV YEAR

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

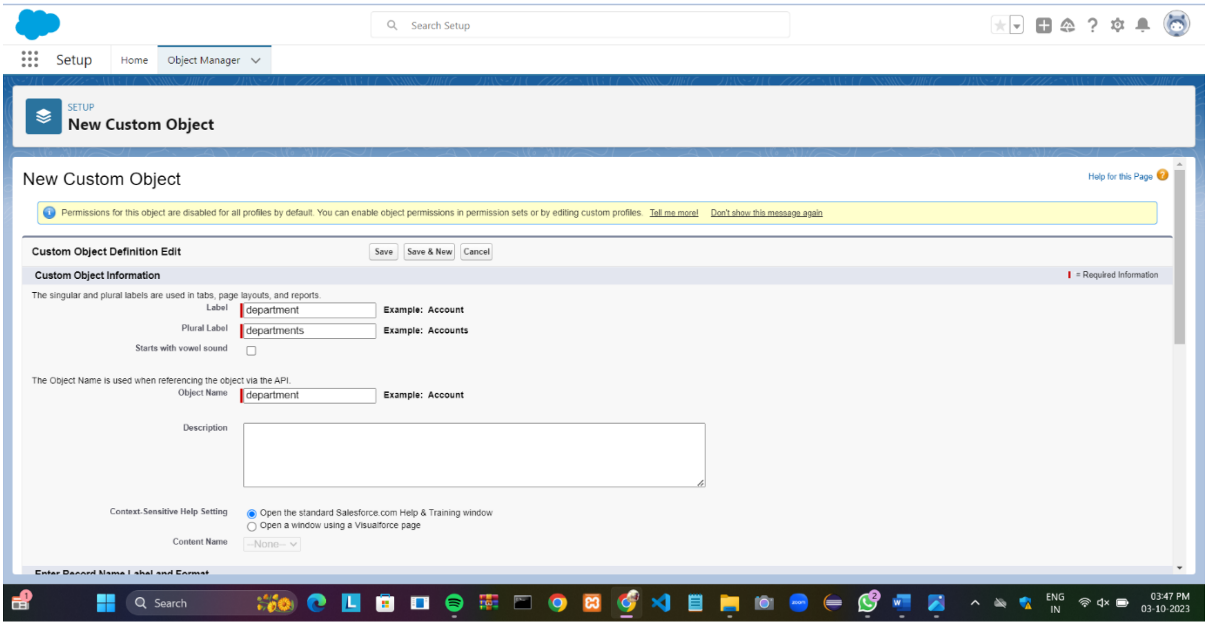
Let's say you have two custom objects, "Parent_Object__c" and "Child_Object__c," and you want to establish a Master-Detail Relationship from Child_Object__c to Parent_Object__c as well as a Roll-Up Summary Field on Parent_Object__c to track the records that are related to Child_Object__c.

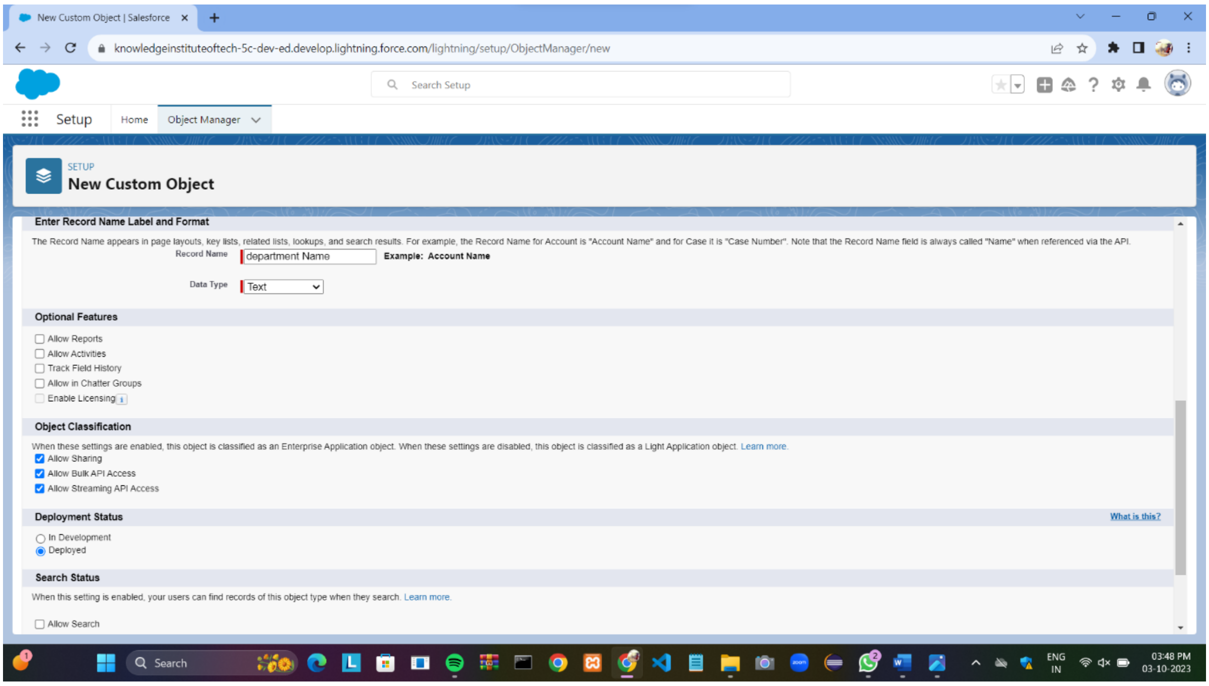
Create Custom Objects: Create the "Parent_Object__c" custom object if you haven't already.





Create the "Child_Object__c" custom object if you haven't already.





Establish a master-detail relationship: - Click "Setup" in the top-right corner by selecting the gear icon.

1) Select "Object Manager" from the list of "Objects and Fields."

2) To access its options, click "Child_Object__c".

3)Select "New Relationship" under "Fields & Relationships" in the menu.

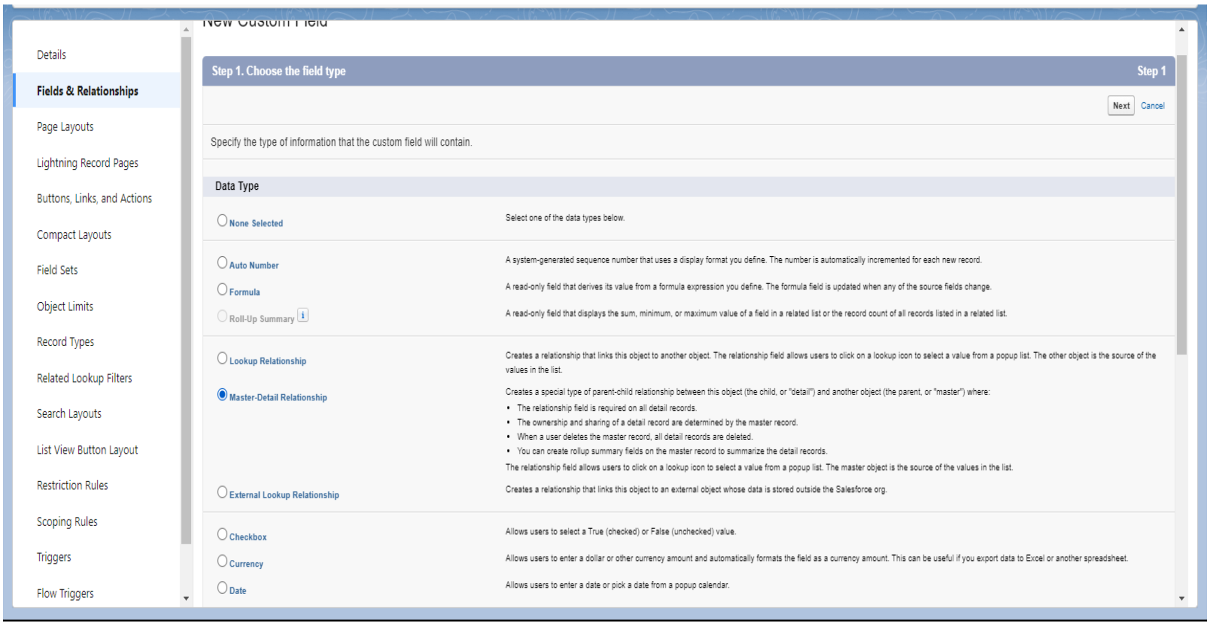
4)Select the "Master-Detail Relationship" relationship type.

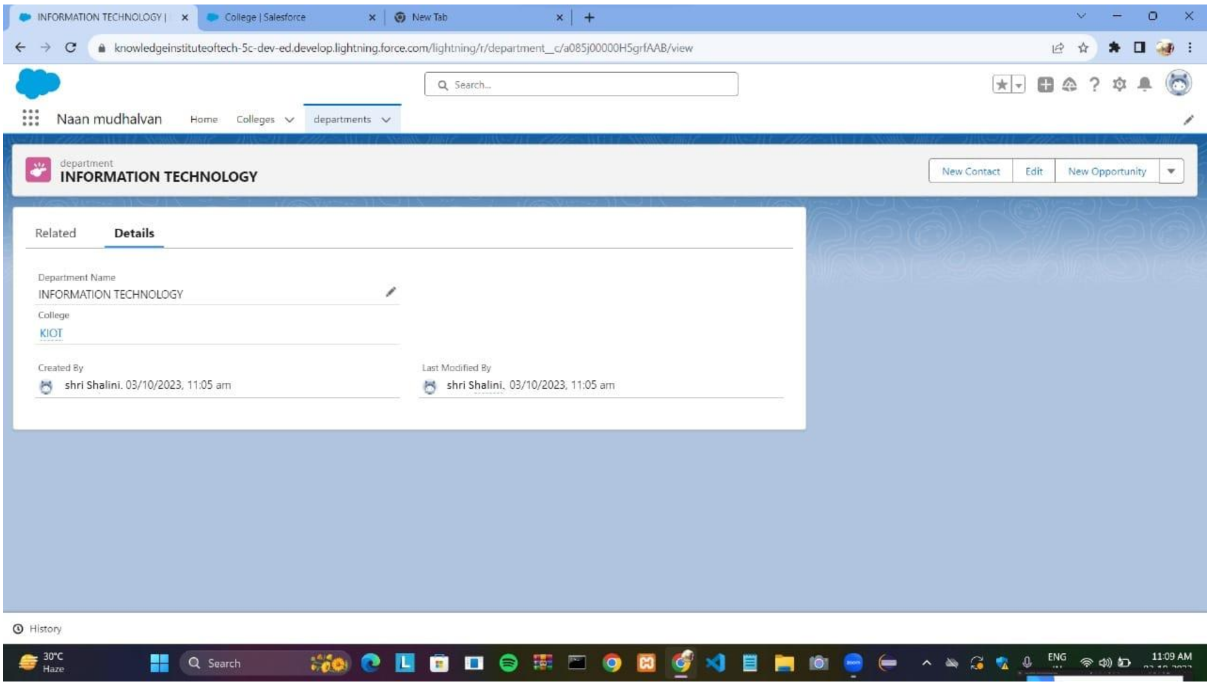
5)"Parent_Object__c" should be chosen as the parent object.

6)Give the connection a name that has meaning, such as "Parent Relationship."

7)Click "Next" to complete the process after defining additional settings such as whether they

are required or not.





Create a field for a roll-up summary:

1) Return to the "Parent_Object__c" settings after building the Master-Detail Relationship.

2)Click on "New" under "Fields & Relationships" and choose "Roll-Up Summary."

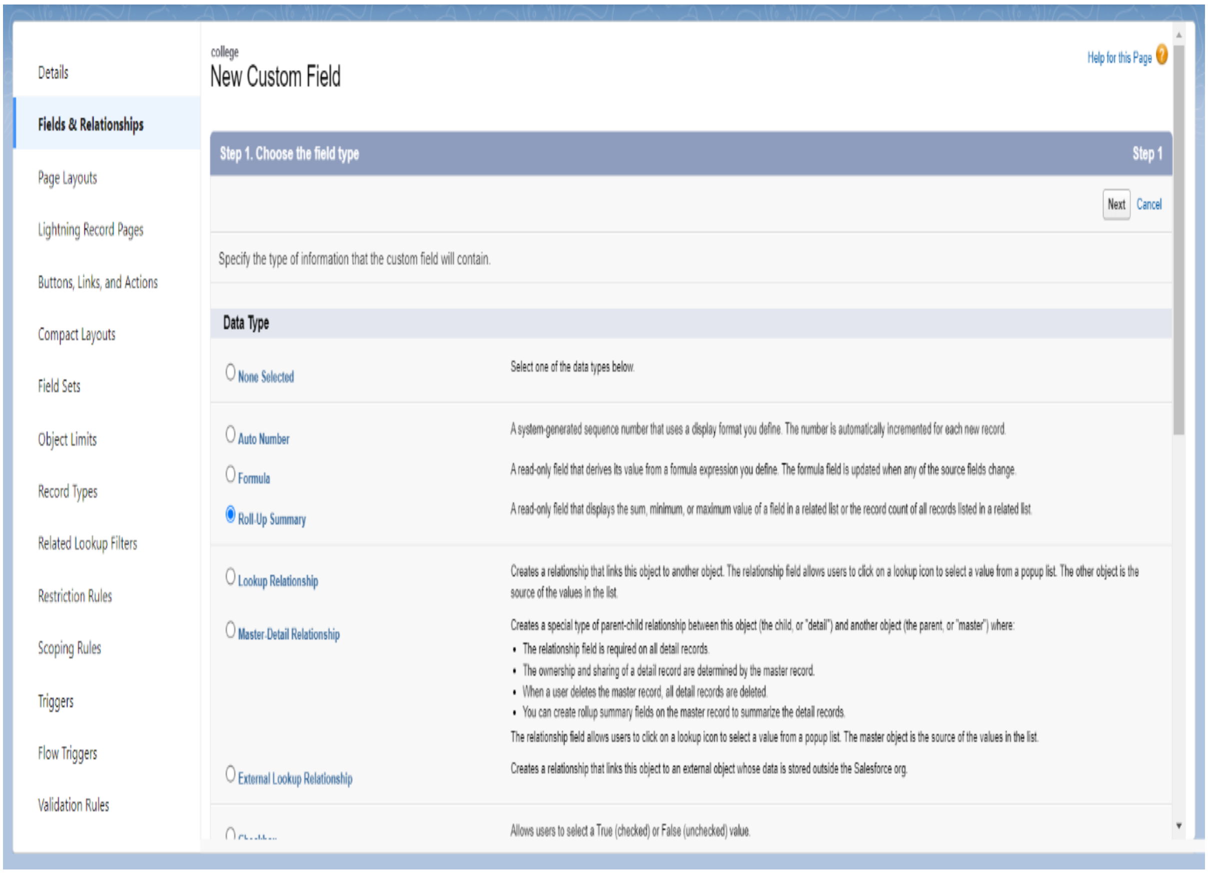
3) Pick the "Child Relationship Name" (made in step 2); an example might be "Child_Object__r"

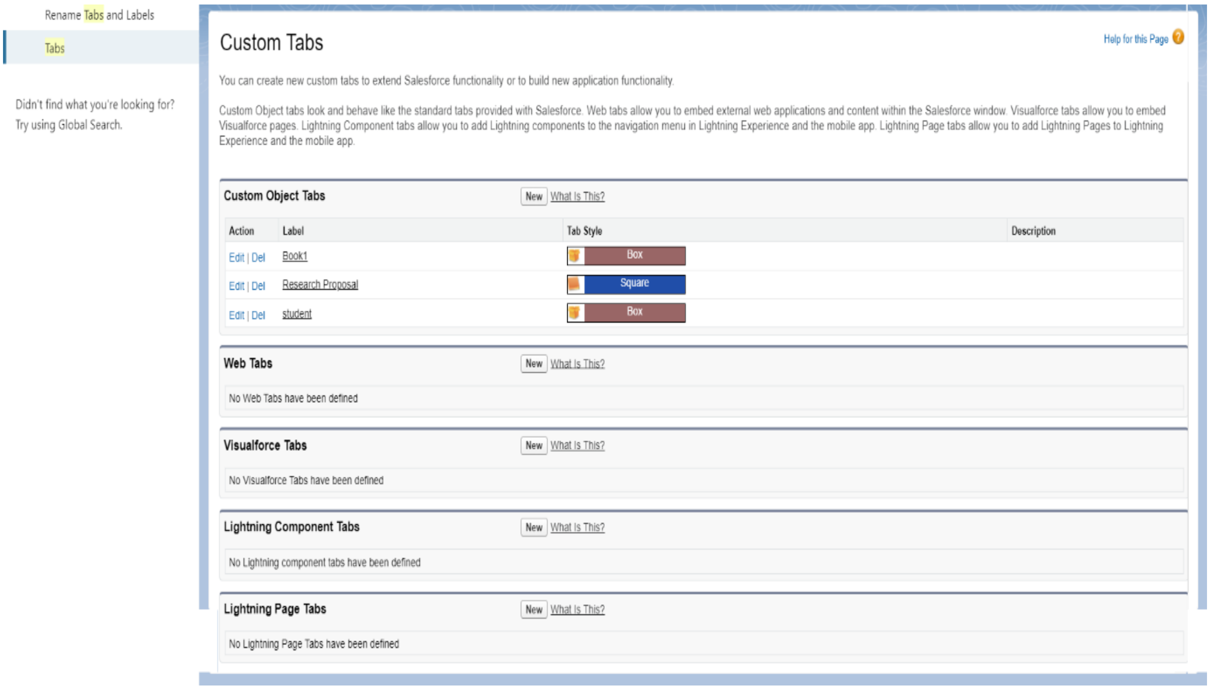
4)Select the aggregation operation, in this example "Count".

5)Create a descriptive field label, such as "Total Child Records".

6)Define other field characteristics if desired.

7)To construct the Roll-Up Summary Field, click "Next" and then "Save".




Rename Tabs and Labels
Tabs
Didn't find what you're looking for?
Try using Global Search.
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
Edit | Del
Book1
Box
Edit | Del
Research Proposal
Square
Edit | Del
student
Box
Web Tabs
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What Is This?
No Web Tabs have been defined
Visualforce Tabs
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No Visualforce Tabs have been defined
Lightning Component Tabs
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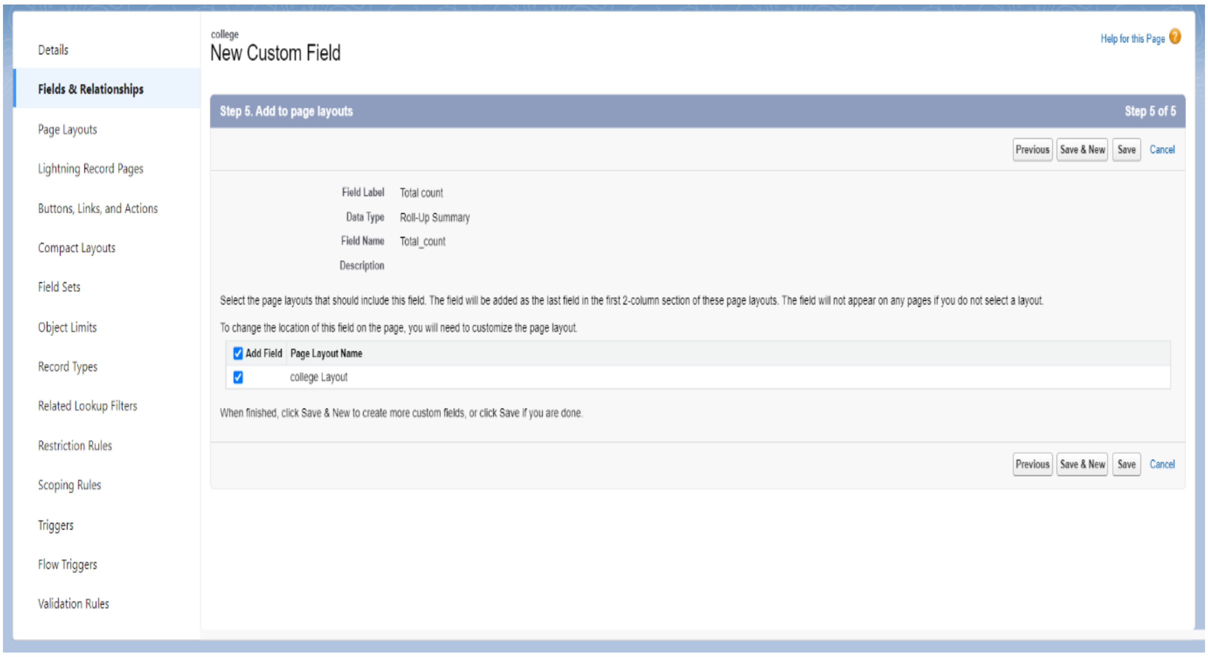
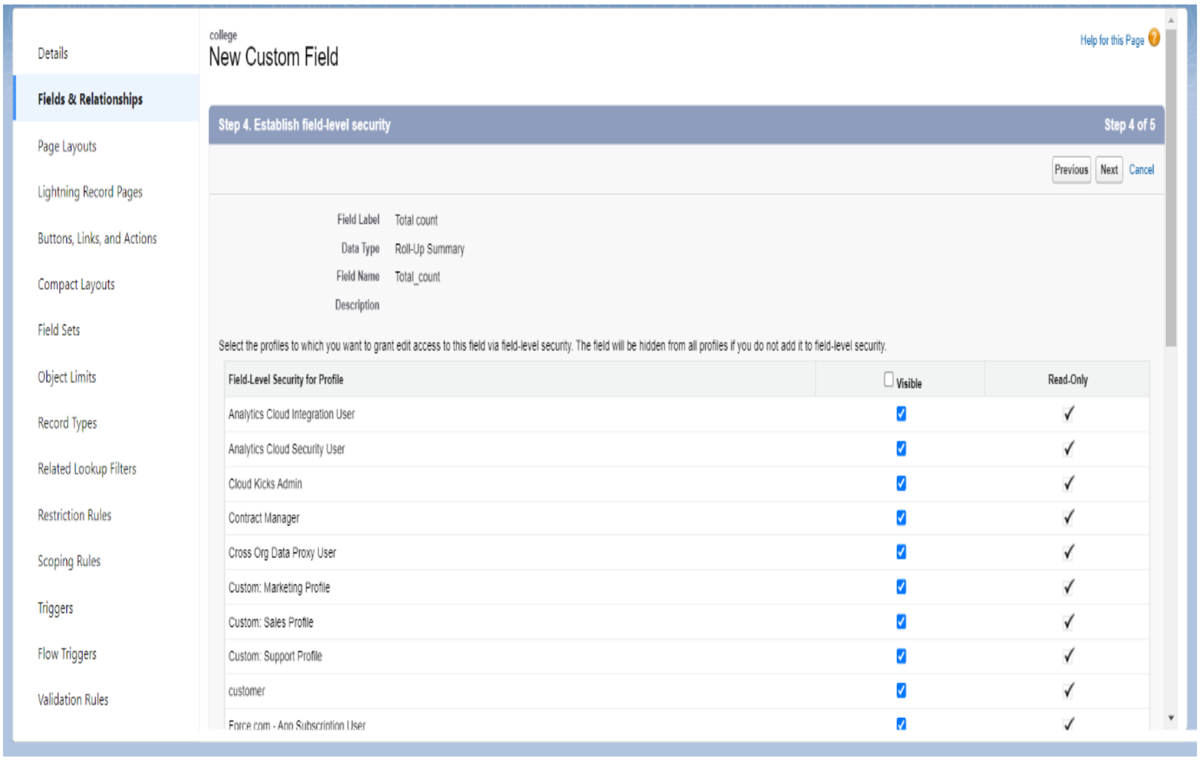
No Lightning component tabs have been defined
Lightning Page Tabs
New
What Is This?
No Lightning Page Tabs have been defined


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
college
New Custom Field
Help for this Page
Step 5. Add to page layouts
Step 5 of 5
Previous
Save & New
Save
Cancel
Field Label
Total count
Data Type
Roll-Up Summary
Field Name
Total_count
Description
Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.
To change the location of this field on the page, you will need to customize the page layout.
Add Field
Page Layout Name
college Layout
When finished, click Save & New to create more custom fields, or click Save if you are done.
Previous
Save & New
Save
Cancel


Details
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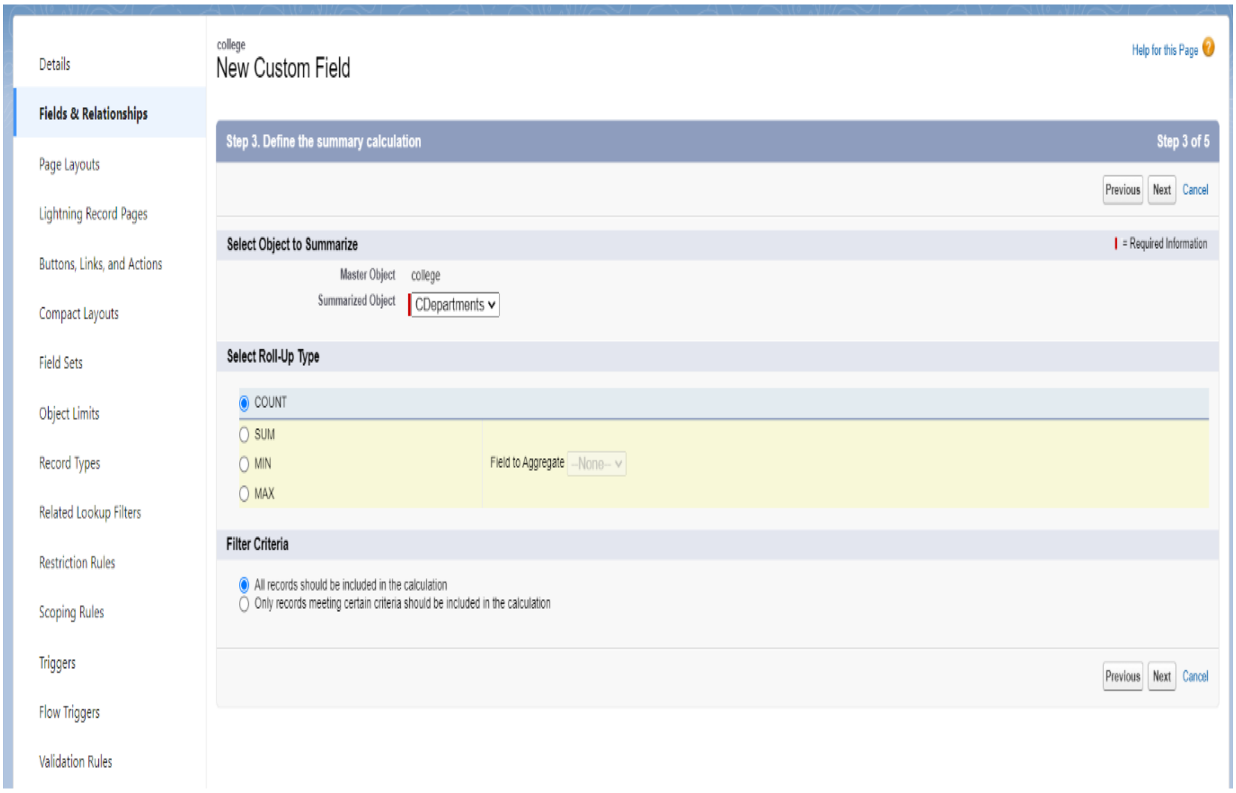
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Triggers
Flow Triggers
Validation Rules
college
New Custom Field
Help for this Page
Step 4. Establish field-level security
Step 4 of 5
Previous
Next
Cancel
Field Label Total count
Data Type Roll-Up Summary
Field Name Total_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
Visible
Read-Only
Analytics Cloud Integration User
Analytics Cloud Security User
Cloud Kicks Admin
Contract Manager
Cross Org Data Proxy User
Custom: Marketing Profile
Custom: Sales Profile
Custom: Support Profile
customer


Details
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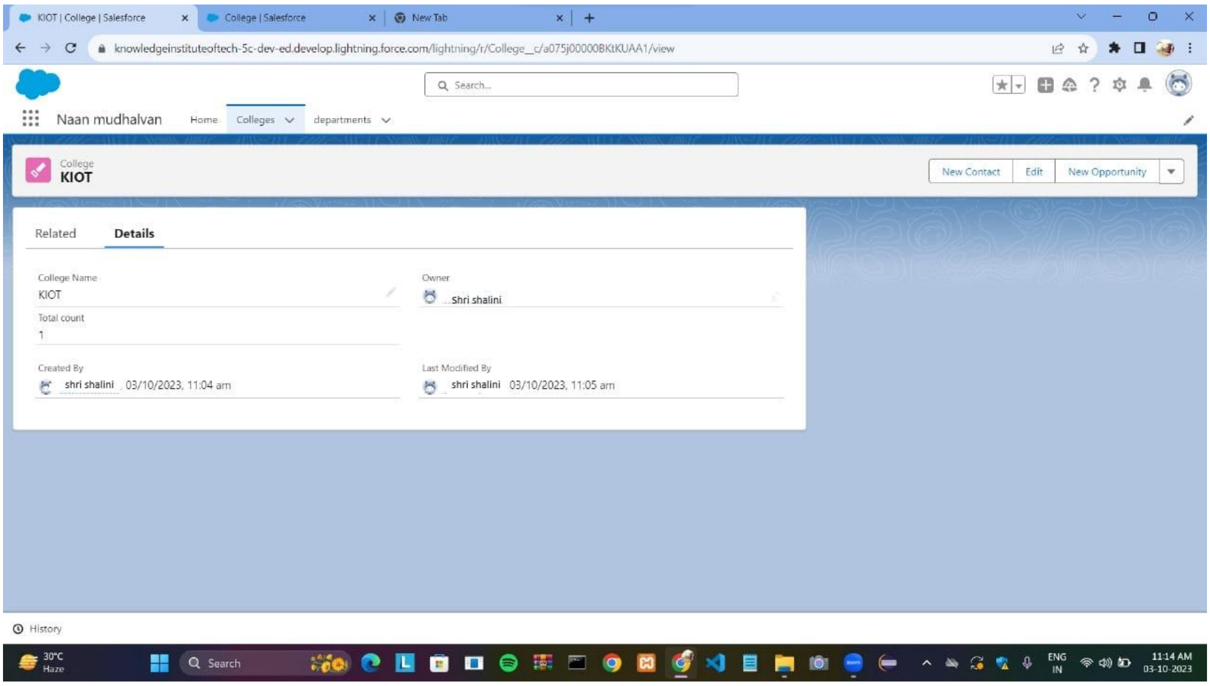
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Triggers
Flow Triggers
Validation Rules
college
New Custom Field
Help for this Page
Step 3. Define the summary calculation
Step 3 of 5
Previous
Next
Cancel
Select Object to Summarize
= Required Information
Master Object college
Summarized Object CDepartments
Select Roll-Up Type
COUNT
SUM
MIN
MAX
Field to Aggregate --None--
Filter Criteria
All records should be included in the calculation
Only records meeting certain criteria should be included in the calculation
Previous
Next
Cancel



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.

To create a user in Salesforce, you'll typically need administrator or delegated permissions. Here are the general steps to create a new user:

Log in to Salesforce:

- Log in to your Salesforce instance with an account that has administrative privileges.

Access the User Setup:

- Click on your profile picture or the user icon in the top-right corner.

- Select "Setup" from the dropdown menu.

Navigate to User Management:

- In the left-hand sidebar, under "Administer," click on "Users."

Create a New User:

- Click on the "New User" button or link to begin creating a new user.

Fill in User Details:

- Fill in the user's information, such as First Name, Last Name, Email, Username (typically an email address), and Alias (used in reports).

- Assign a Role to the user to determine their access within the role hierarchy.

- Choose a License Type (e.g., Salesforce, Chatter Free, or a specific app license).

- Assign a Profile to the user to determine their permissions and settings.

Save the User:

- Click the "Save" button to create the user.

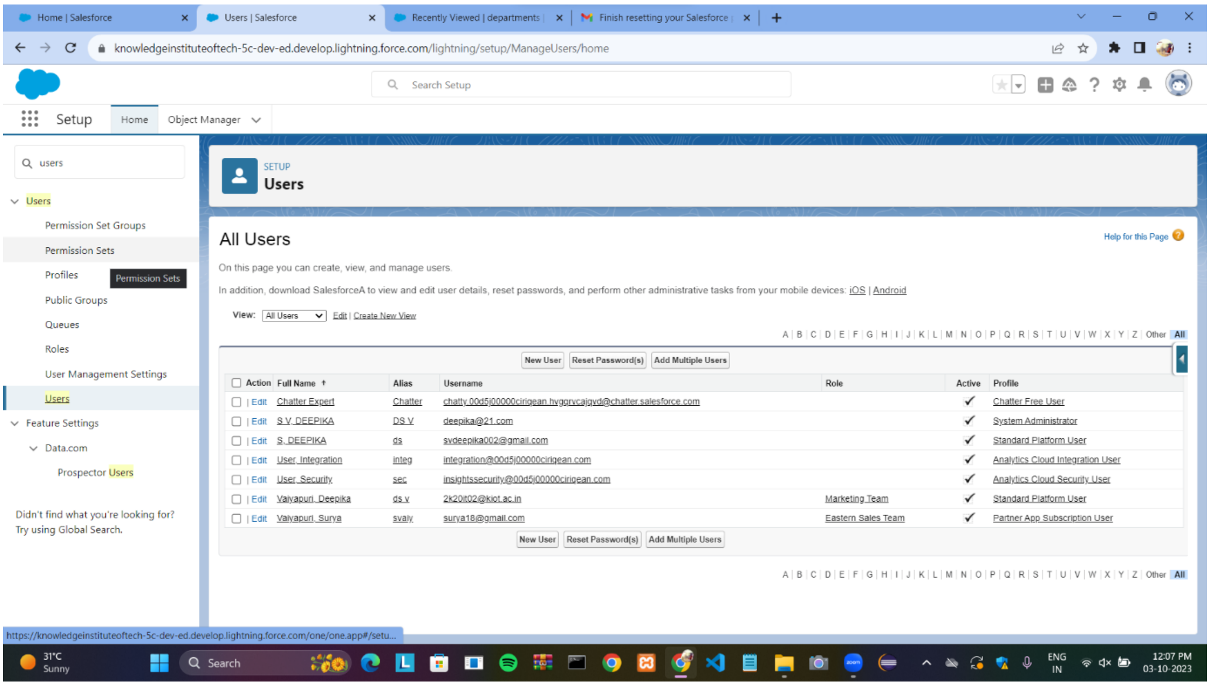
Assign a Password:

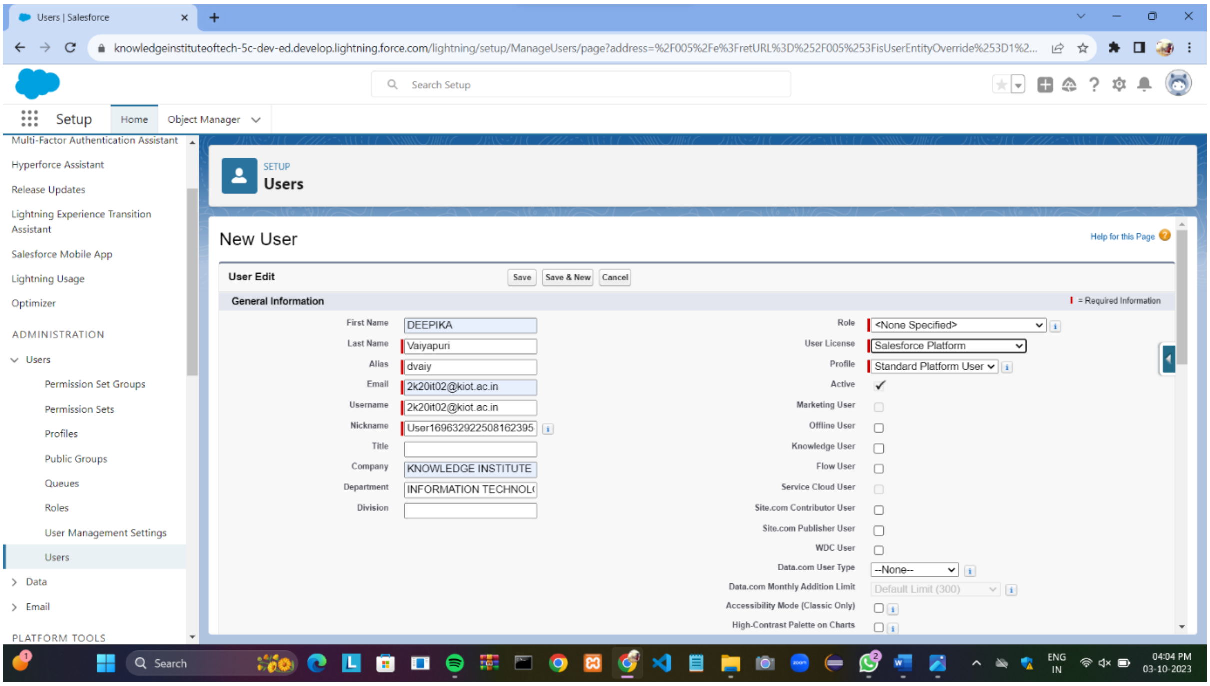
- After saving the user, you'll be prompted to assign a temporary password.

- Communicate this temporary password to the user, who will need to change it upon their first login.

Verify User Creation:

- Log out of your administrator account and log in as the newly created user to ensure they have the expected access and permissions.





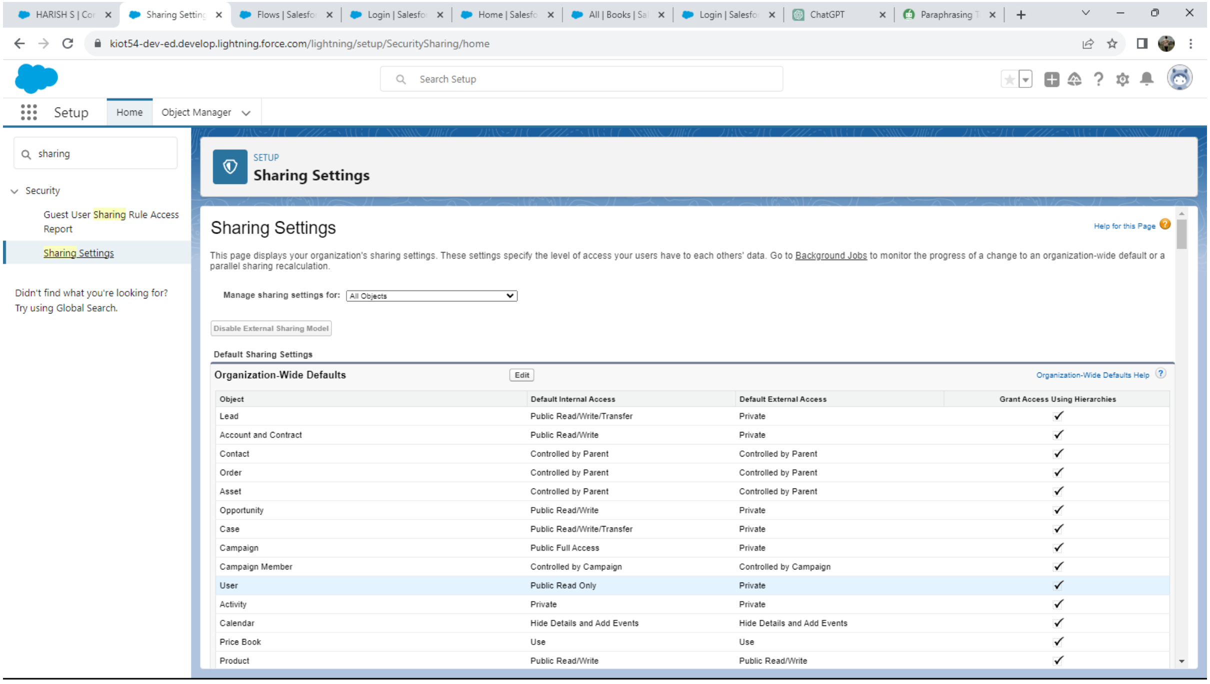
There are four ways you can manage record-level access. They are presented in ascending order of access. The most stringent degree of data protection is achieved using the organization-wide settings, and as needed, access is then granted to specific users using the various record-level security measures.

The default level of access that users have to one another's records is defined by organization-wide defaults.

Role hierarchies make guarantee that bosses have access the same information as their subordinates. A user or group of users may require a certain amount of data access, which is represented by each role in the hierarchy.

Sharing rules allow specific user groups access to documents they don't own or ordinarily can't see by automatically deviating from the organization's default settings.

Owners of records can offer read-only and edit access manually.



Role hierarchies ensure managers have access to the same records as their subordinates. Each role in the hierarchy represents a level of data access that a user or group of users needs.

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.

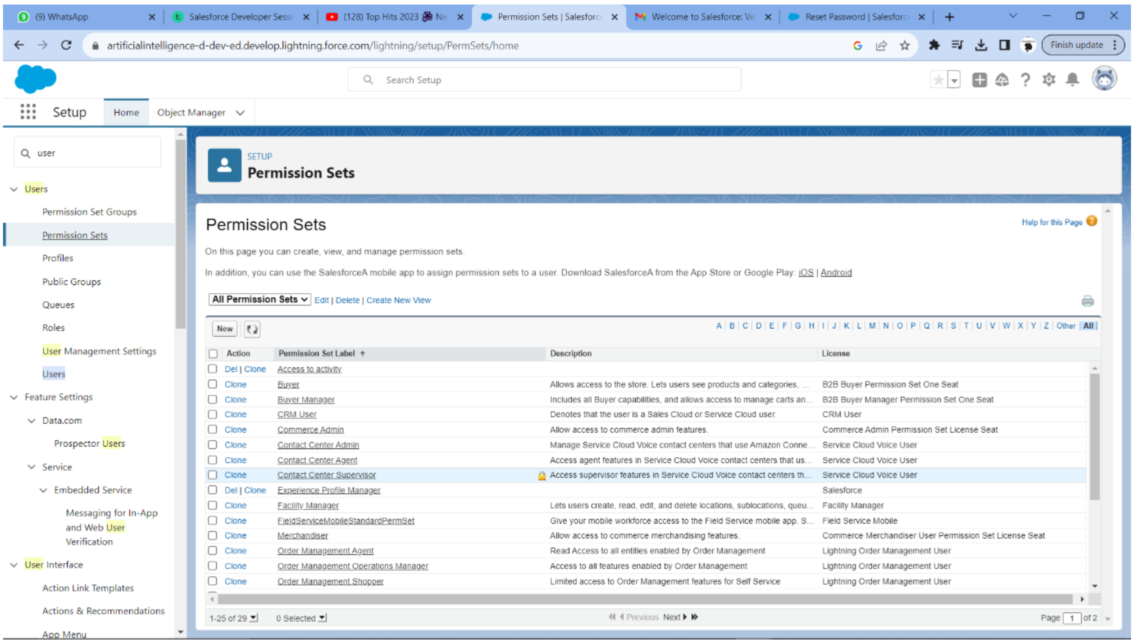
Ownership:

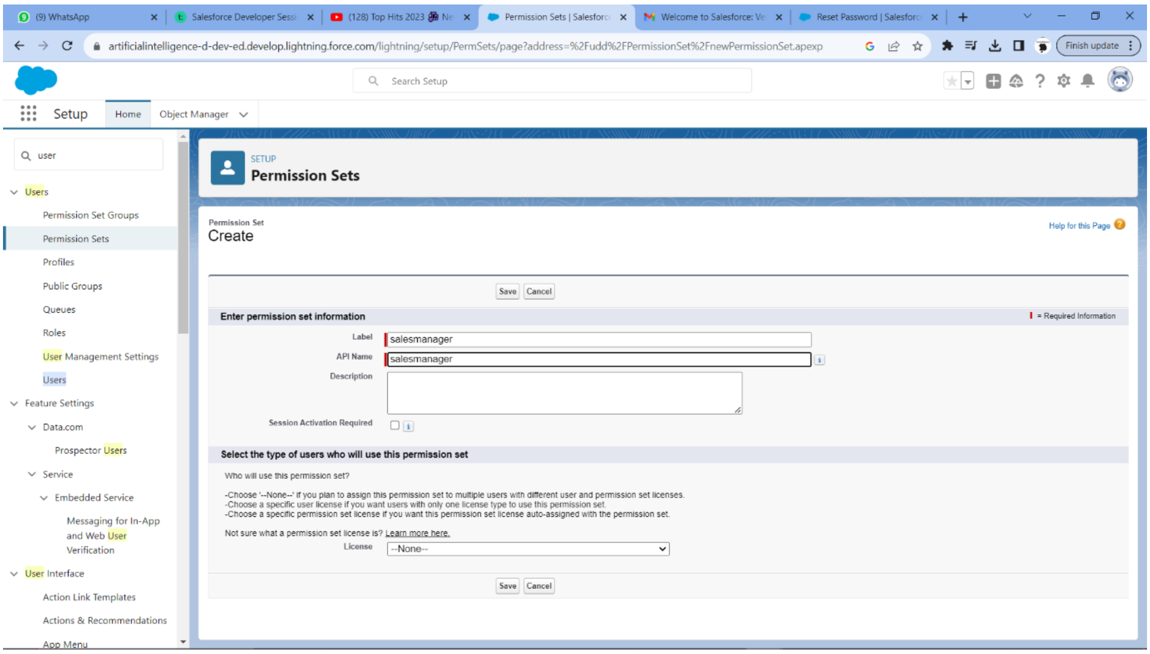
• Ensure that the Account records are owned by the respective users, with User A owning their records and User B owning their records.

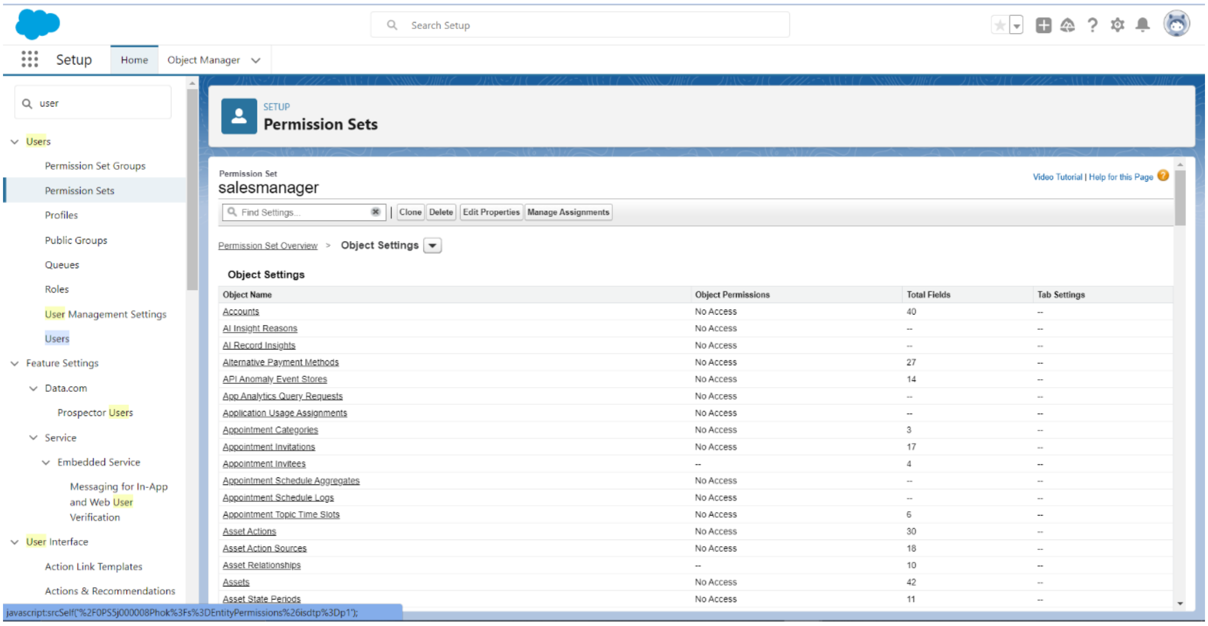
Organization-Wide Defaults:

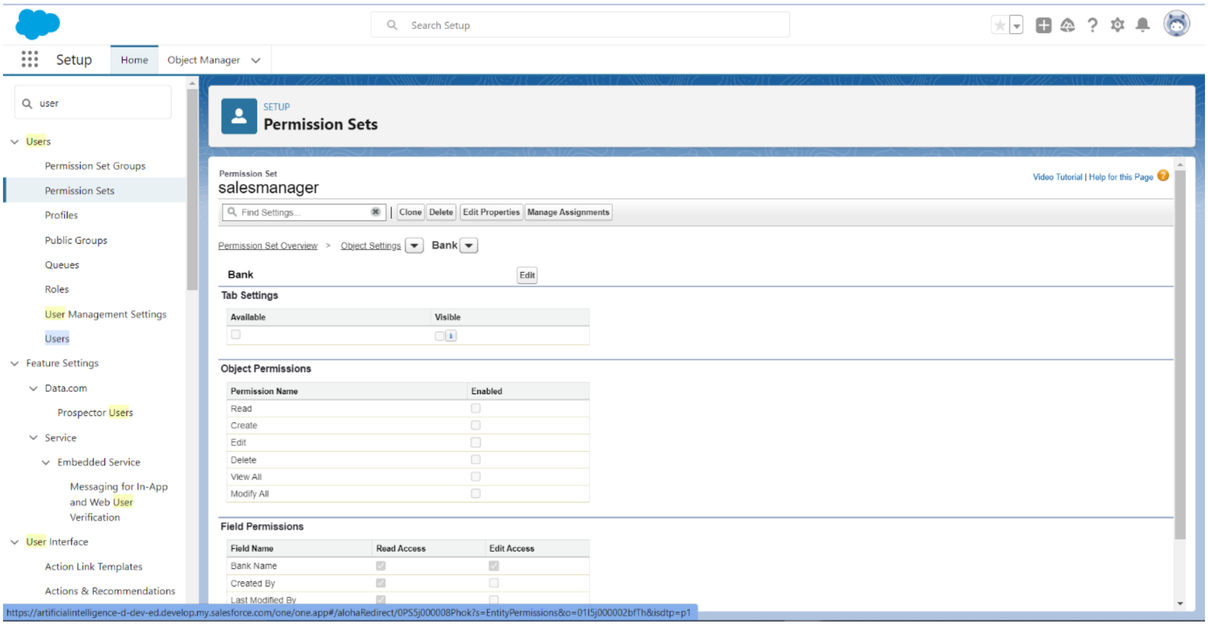
• Set the organization-wide defaults for the Account object to "Private" to ensure that records are private by default.

Testing: • Test the setup by logging in as User A and User B separately to verify that they cannot access each other's records.

• 




Search Setup
Setup
Home
Object Manager
user
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Feature Settings
Data.com
Prospector Users
Service
Embedded Service
Messaging for In-App and Web User Verification
User Interface
Action Link Templates
Actions & Recommendations
SETUP
Permission Sets
Permission Set
salesmanager
Video Tutorial | Help for this Page
Find Settings...
Clone
Delete
Edit Properties
Manage Assignments
Permission Set Overview > Object Settings
Object Settings
Object Name
Object Permissions
Total Fields
Tab Settings
Accounts
AI Insight Reasons
AI Record Insights
Alternative Payment Methods
API Anomaly Event Stores
App Analytics Query Requests
Application Usage Assignments
Appointment Categories
Appointment Invitations
Appointment Invitees
Appointment Schedule Aggregates
Appointment Schedule Logs
Appointment Topic Time Slots
Asset Actions
Asset Action Sources
Asset Relationships
Assets
Asset State Periods
No Access
javascript:srcSelf('%2F0PS5j000008Phok%3Fs%3DEntityPermissions%26isdtp%3Dp1');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Users
Feature Settings
Data.com
Prospector Users
Service
Embedded Service
Messaging for In-App and Web User Verification
User Interface
Action Link Templates
Actions & Recommendations
SETUP
Permission Sets
Permission Set
salesmanager
Video Tutorial | Help for this Page
Find Settings...
Clone
Delete
Edit Properties
Manage Assignments
Permission Set Overview > Object Settings Bank
Bank
Edit
Tab Settings
Available
Visible
Object Permissions
Permission Name
Enabled
Read
Create
Edit
Delete
View All
Modify All
Field Permissions
Field Name
Read Access
Edit Access
Bank Name
Created By
Last Modified By
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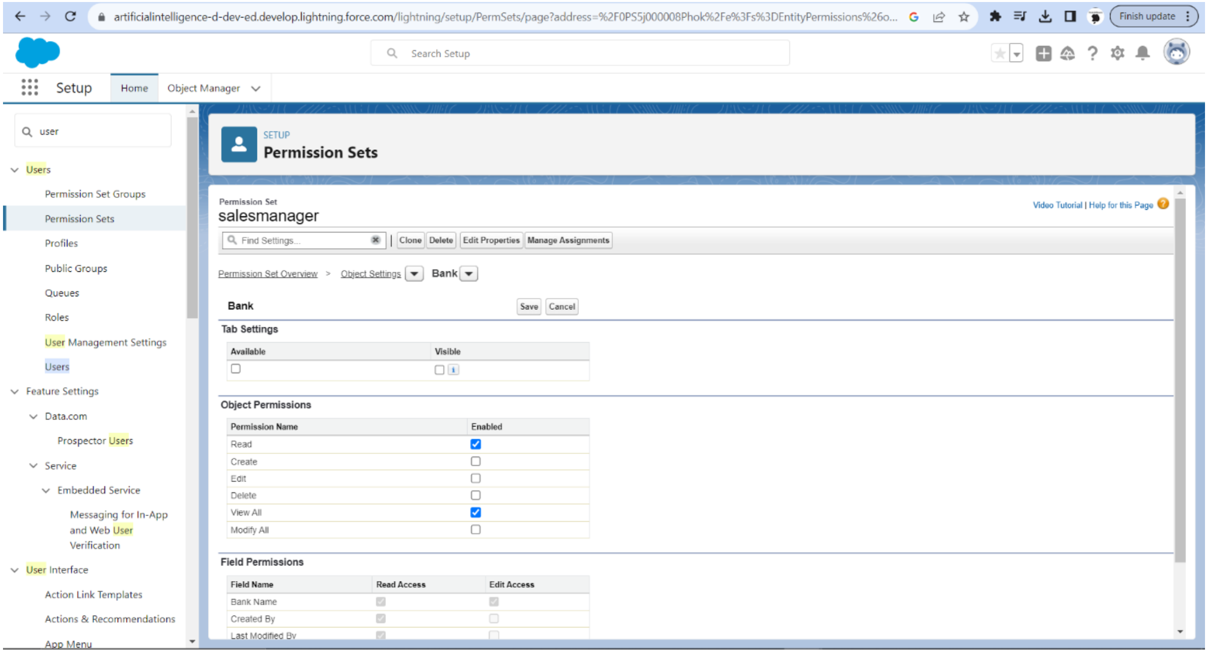
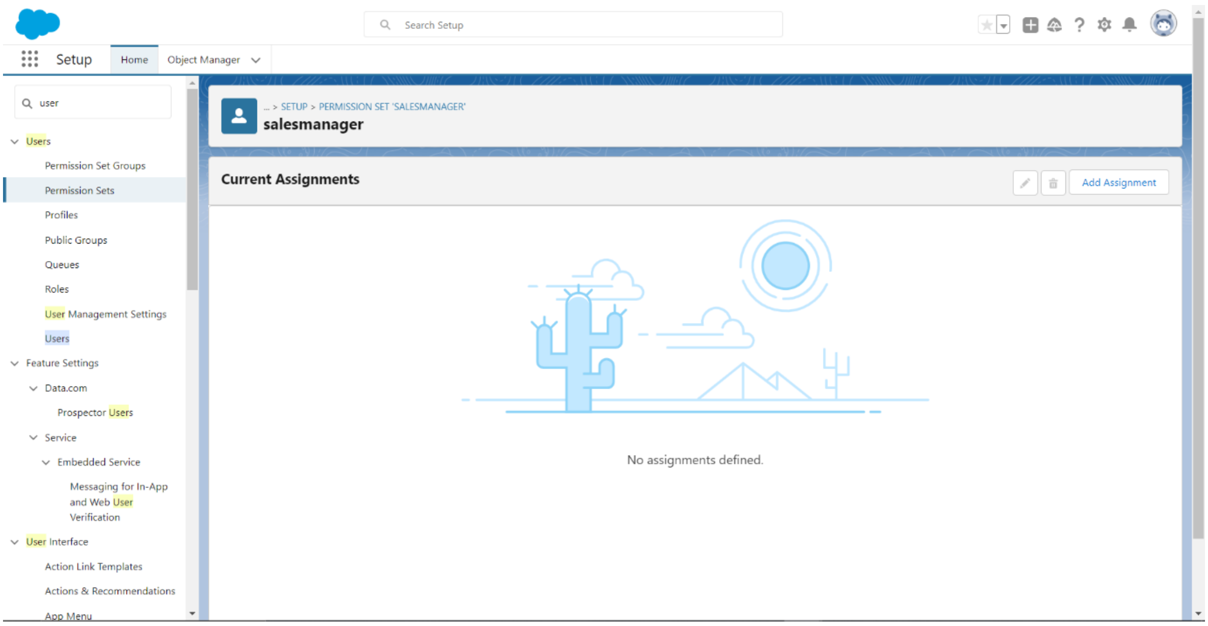
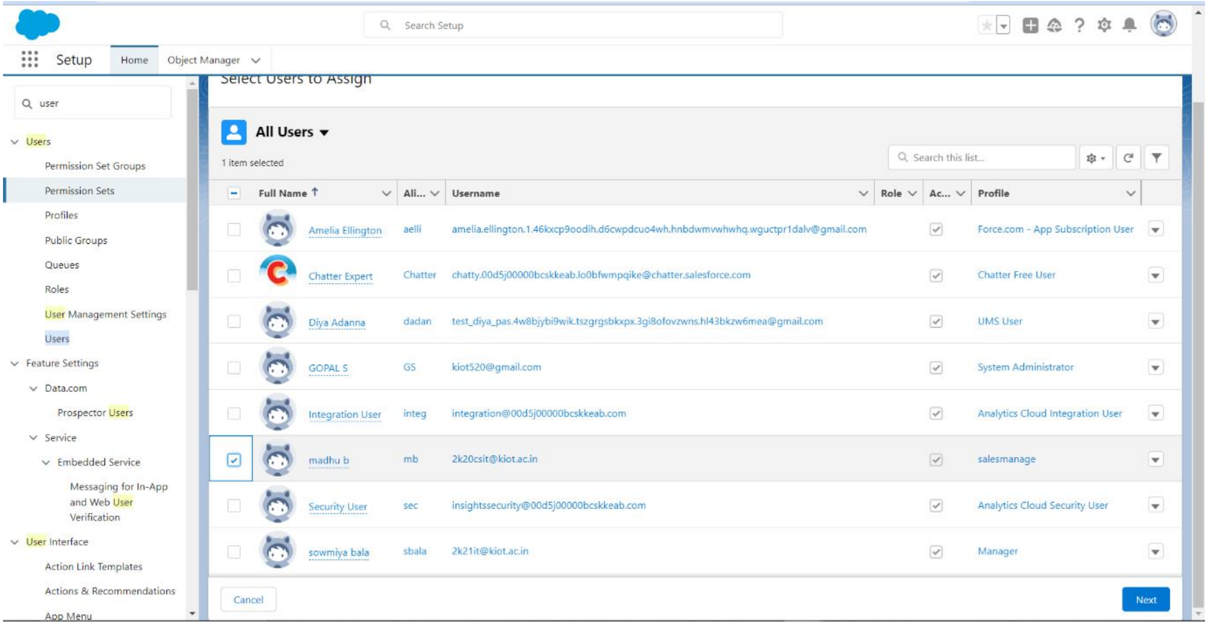
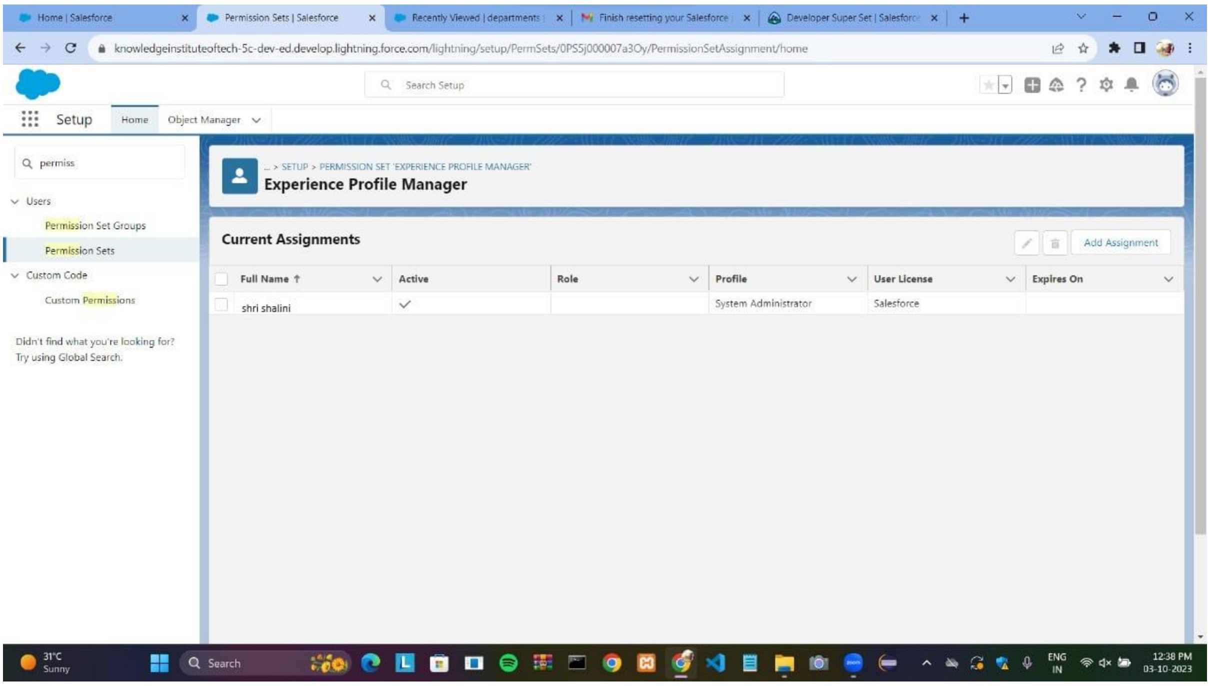








3. Suppose there are 2 Users and they are having Create, Read, Edit access on Account Object with the same profile but we want to open up the access for one user to delete how will you implement the Security setting.

1.Create a New Permission Set:

- Go to Setup > Permission Sets and click "New Permission Set."

2. Define Object Permissions:

- In the Permission Set, go to "Object Settings" and find the Account object.

- Edit the permissions for the Account object in the Permission Set.

- Grant the "Delete" permission to the user you want to allow to delete records. Leave it unchecked for the other user.

3.Assign Permission Sets:

- Assign the newly created Permission Set with the "Delete" permission to the user you want to grant this access to.

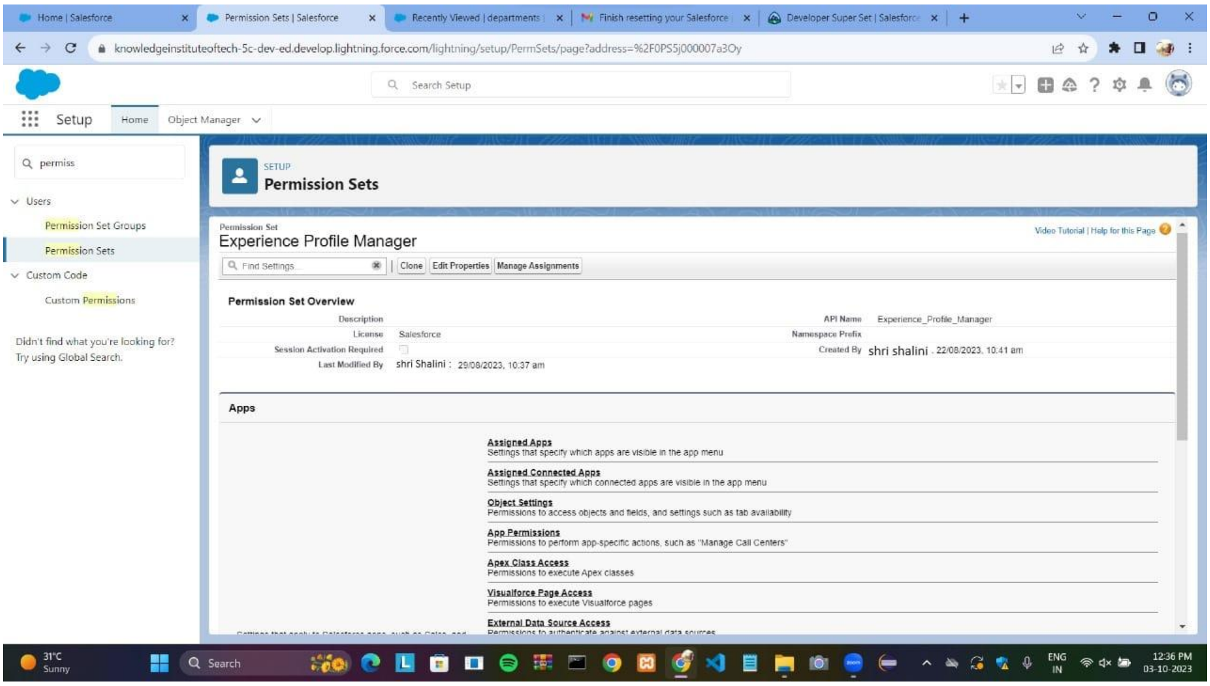
4.Remove Delete Access from Profile:

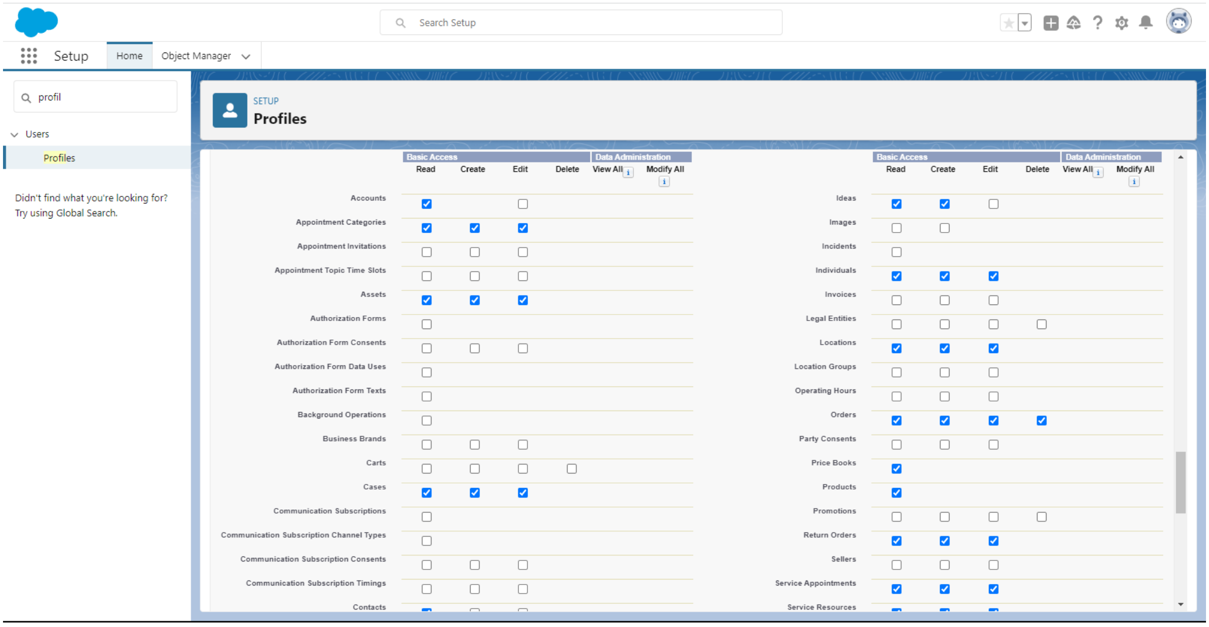
- Go to the profile assigned to both users.

- In the profile settings, remove the "Delete" permission for the Account object.

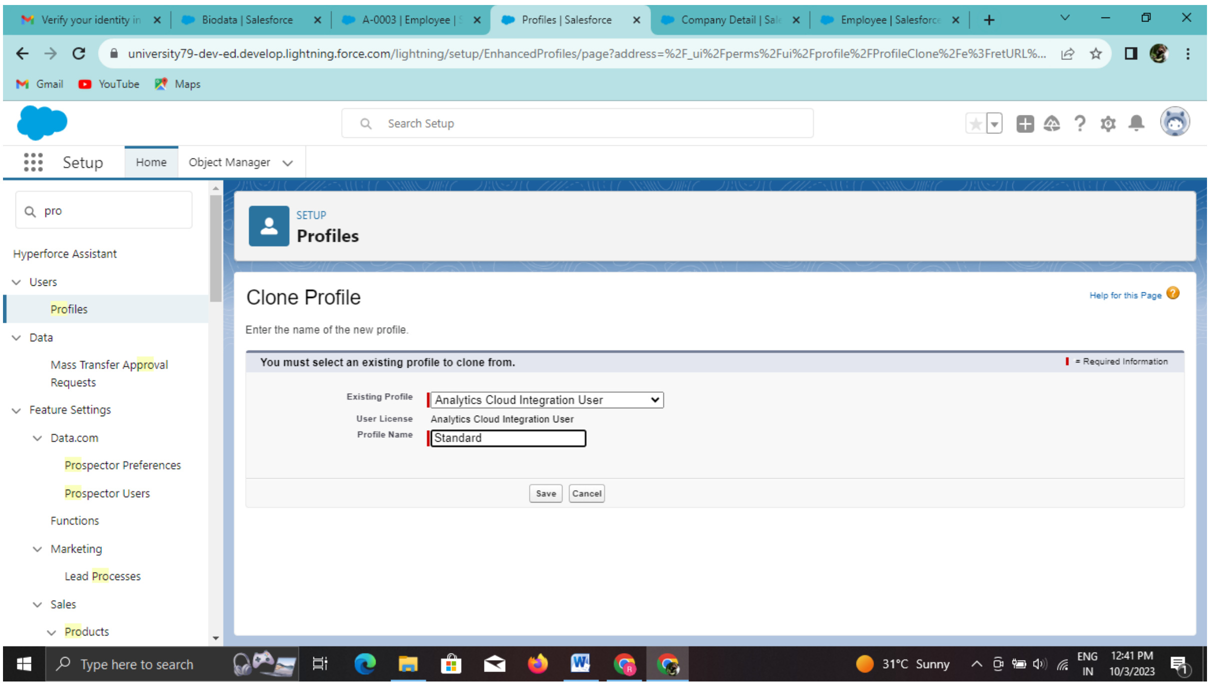
Profile Creation:

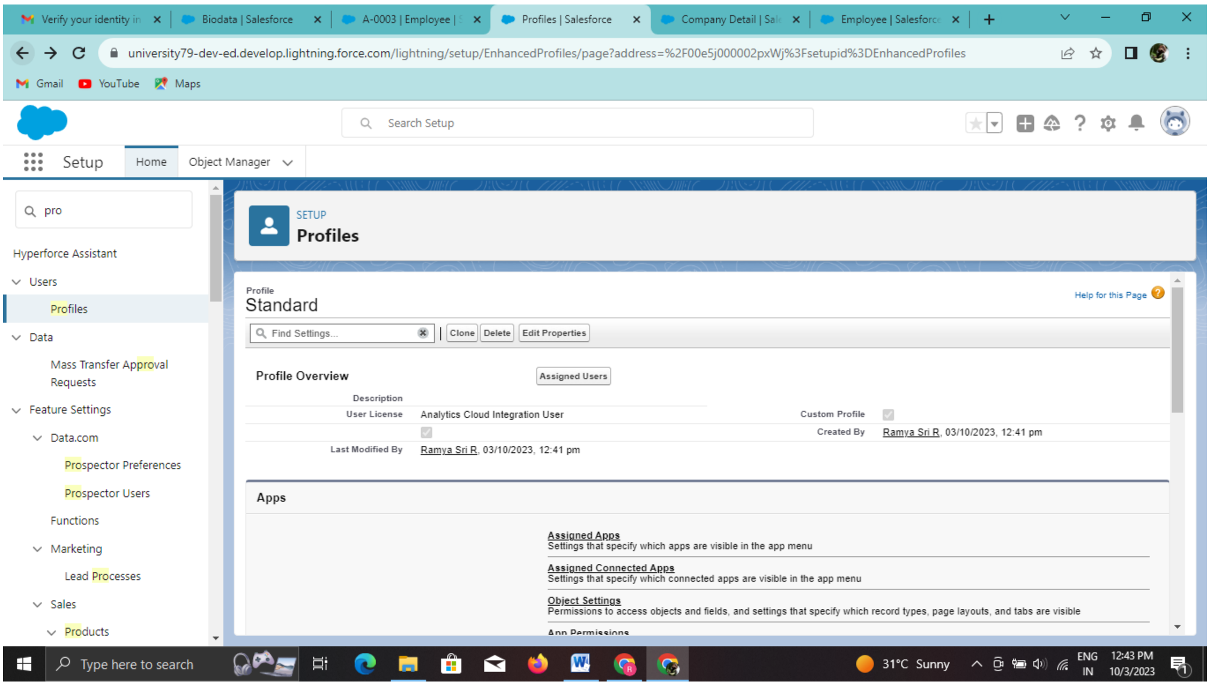
Creating profiles and add to the existing user to grant the permission set.

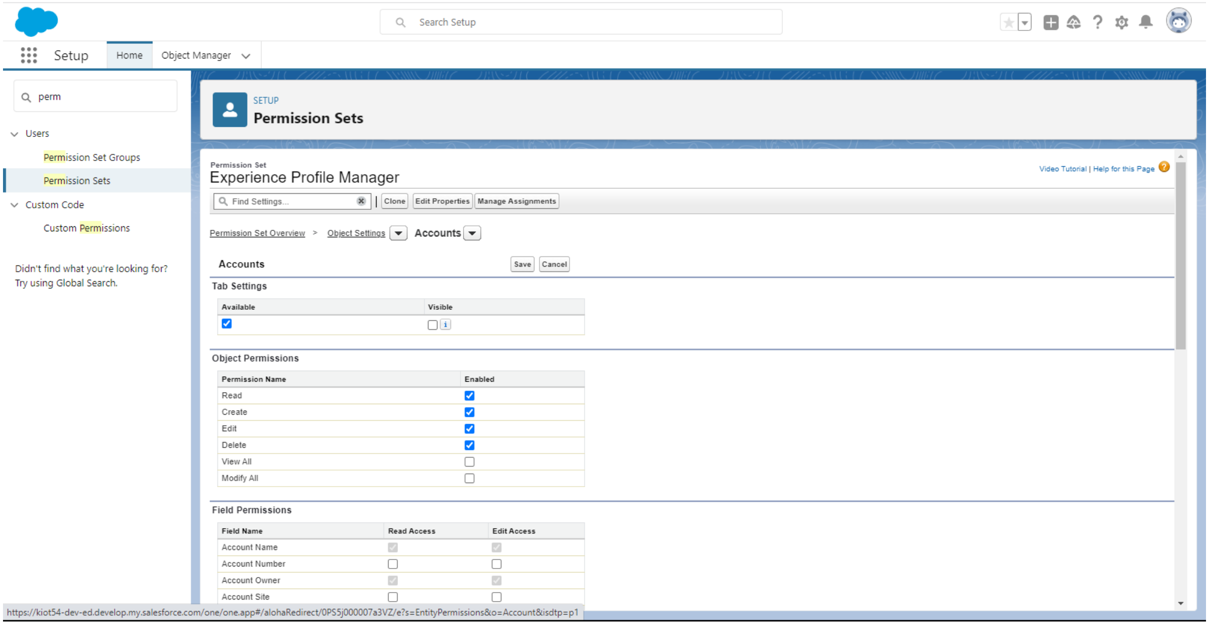




Permission Sets:







By following these steps, you have effectively granted delete access to one user while keeping it restricted for the other user. The user with the Permission Set will be able to delete Account records, while the user without the Permission Set will only have Create, Read, and Edit access but won't have the ability to delete records.

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

Step 1: Access Salesforce Setup

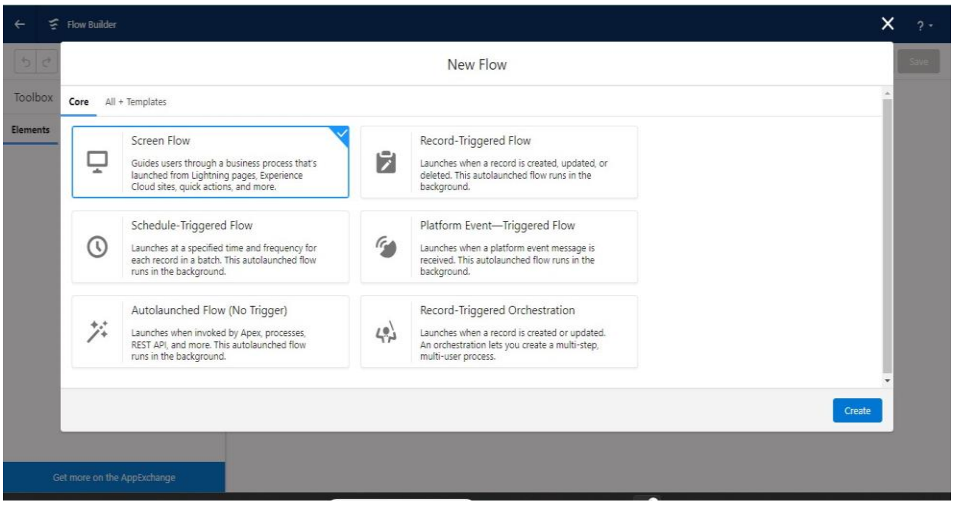
1. Open your Salesforce account and log in.

2. Select the gear icon or your profile photo in the top-right corner.

3. From the dropdown menu, choose "Setup".

Step 2: Create a flow

1. In the Quick Find box of the Setup menu, type "Flows" and choose "Flows."



Step 3 : Add Screen Elements

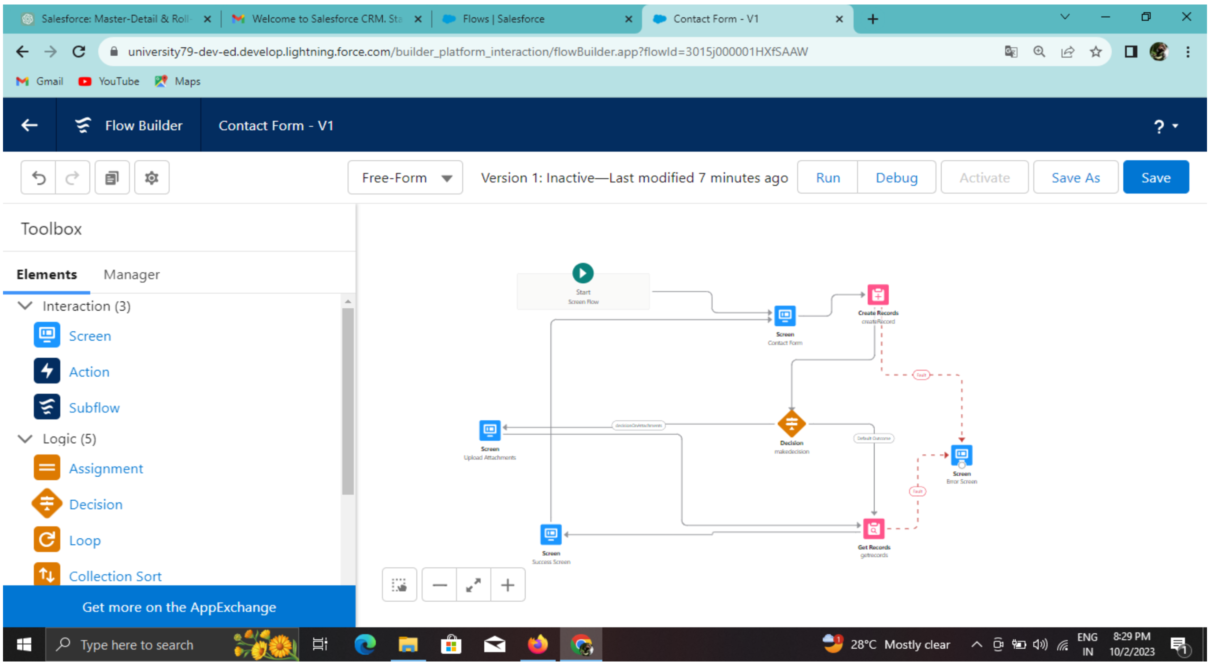
1. Move a "Screen" component into position on the canvas. This will be where your flow will begin.

2. To configure an element of the screen, click on it.

3. Include language and instructions on this screen to explain the survey and what data are needed.

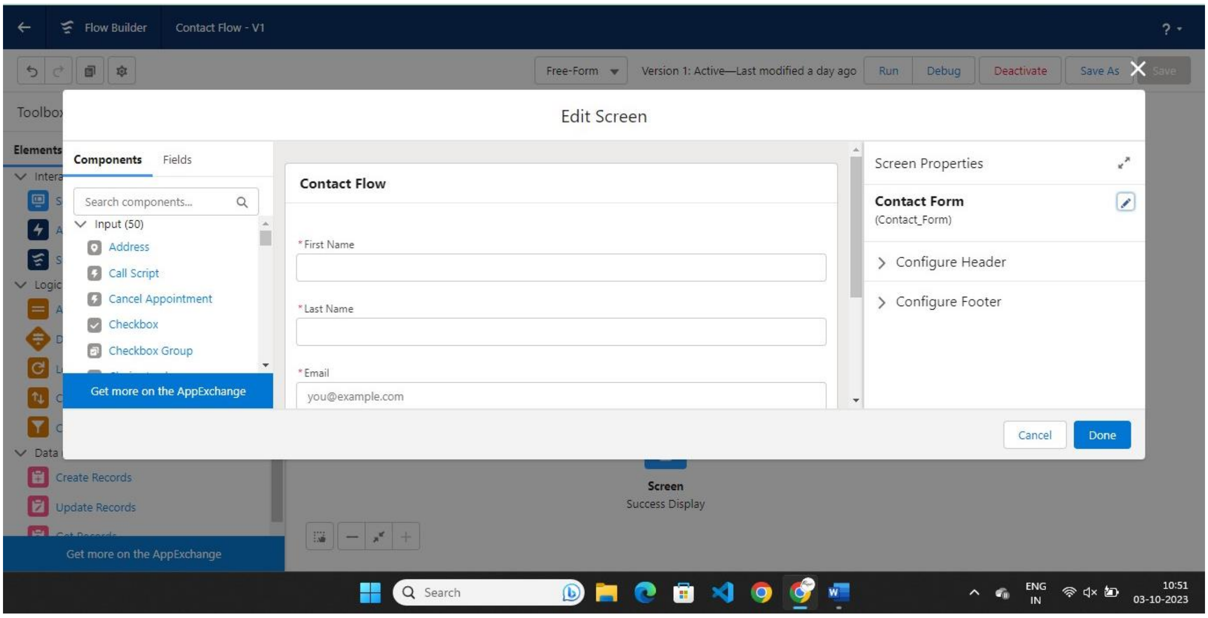
4. To allow visitors to enter survey information, drag and drop the necessary input components (such as text fields, radio buttons, and checkboxes) onto the page. These components can be found in the left-hand palette.

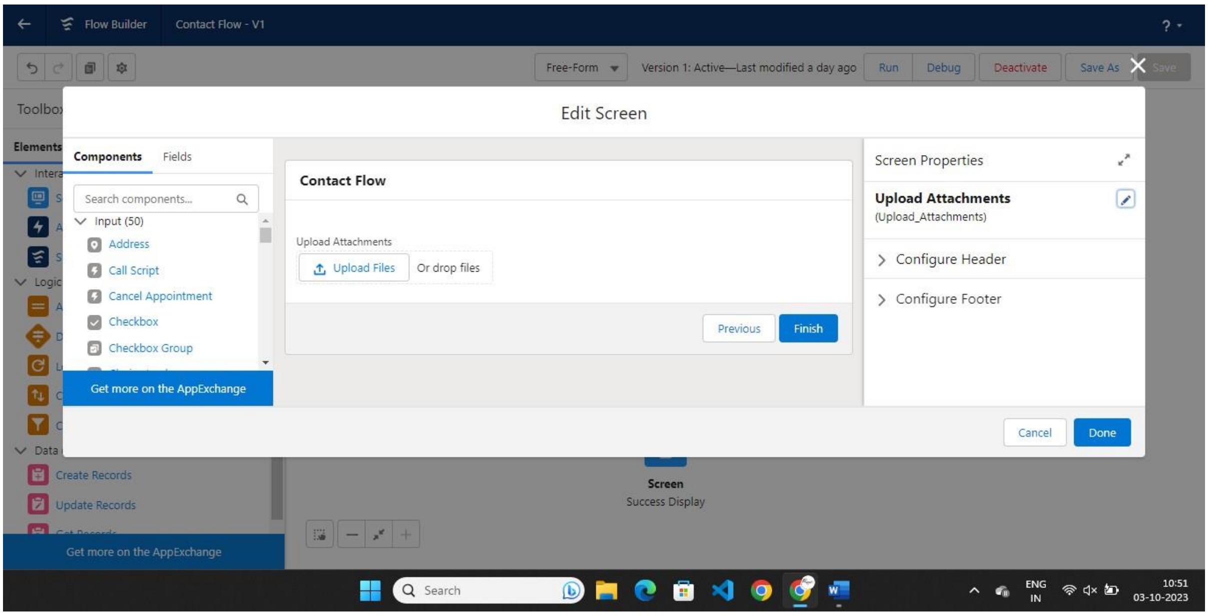
5. If required, add the proper labels, explanatory text, and validation rules to each input element.



Step 4: construct Variables

1. You must construct variables to hold the survey data if you wish to collect and save it. Create variables for each field on the screen by selecting the "Manager" tab in the palette. Verify that the data types of the related fields and the variable types are the same.




Flow Builder
Contact Flow - V1
Free-Form
Version 1: Active—Last modified a day ago
Run
Debug
Deactivate
Save As
Save
Edit Screen
Components
Fields
Search components...
Input (50)
Address
Call Script
Cancel Appointment
Checkbox
Checkbox Group
Get more on the AppExchange
Contact Flow
Upload Attachments
Upload Files
Or drop files
Previous
Finish
Screen Properties
Upload Attachments
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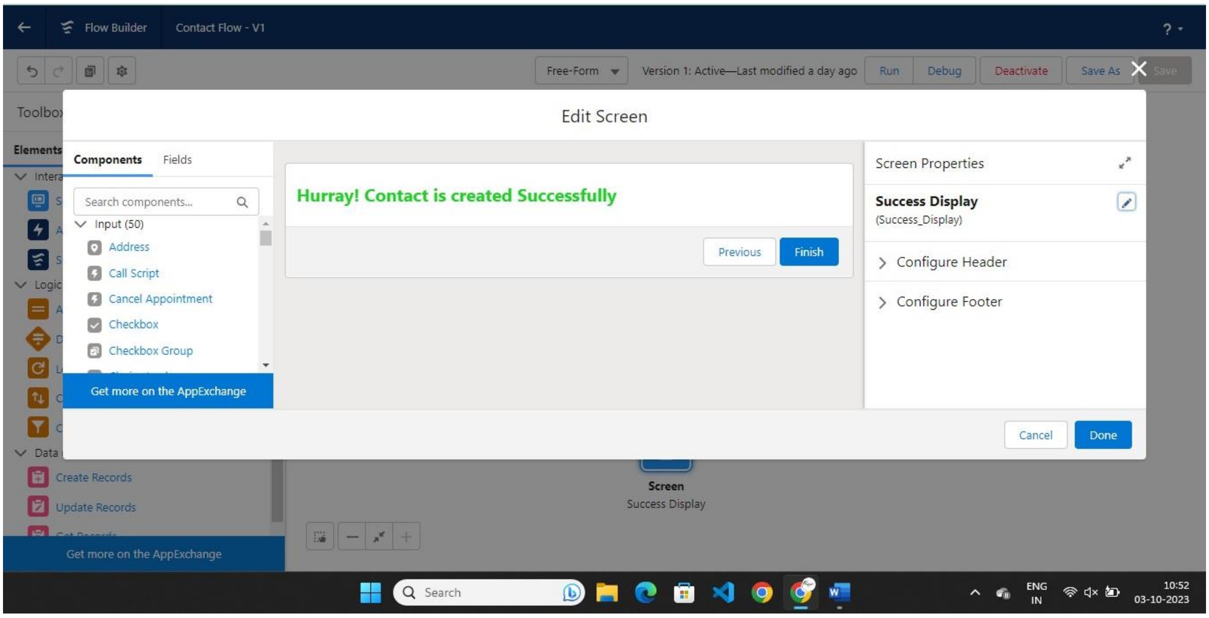
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Contact Flow - V1
Free-Form
Version 1: Active—Last modified a day ago
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Debug
Deactivate
Save As
Save
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Search components...
Input (50)
Address
Call Script
Cancel Appointment
Checkbox
Checkbox Group
Get more on the AppExchange
Hurray! Contact is created Successfully
Previous
Finish
Screen Properties
Success Display
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Configure Footer
Cancel
Done
Create Records
Update Records
Screen
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Search
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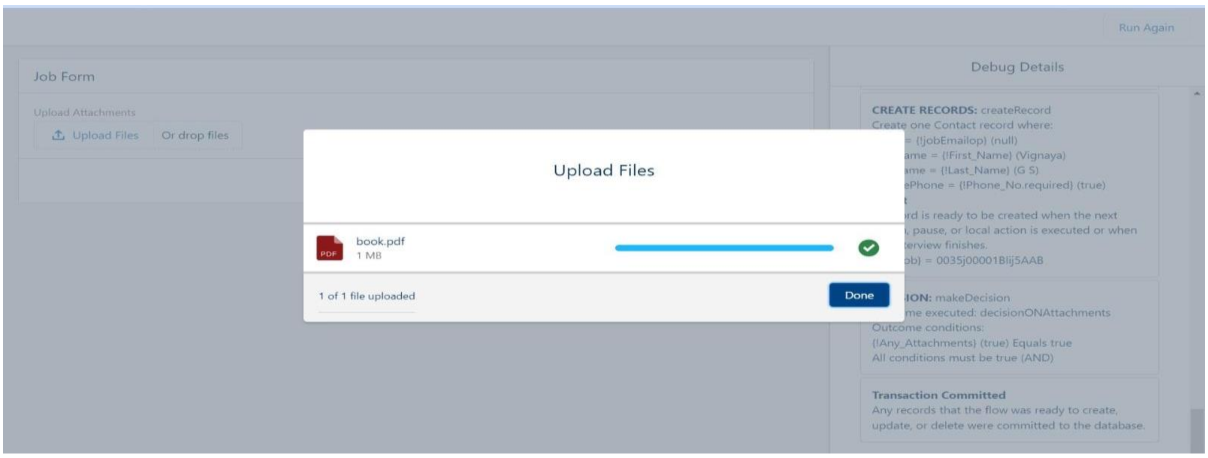
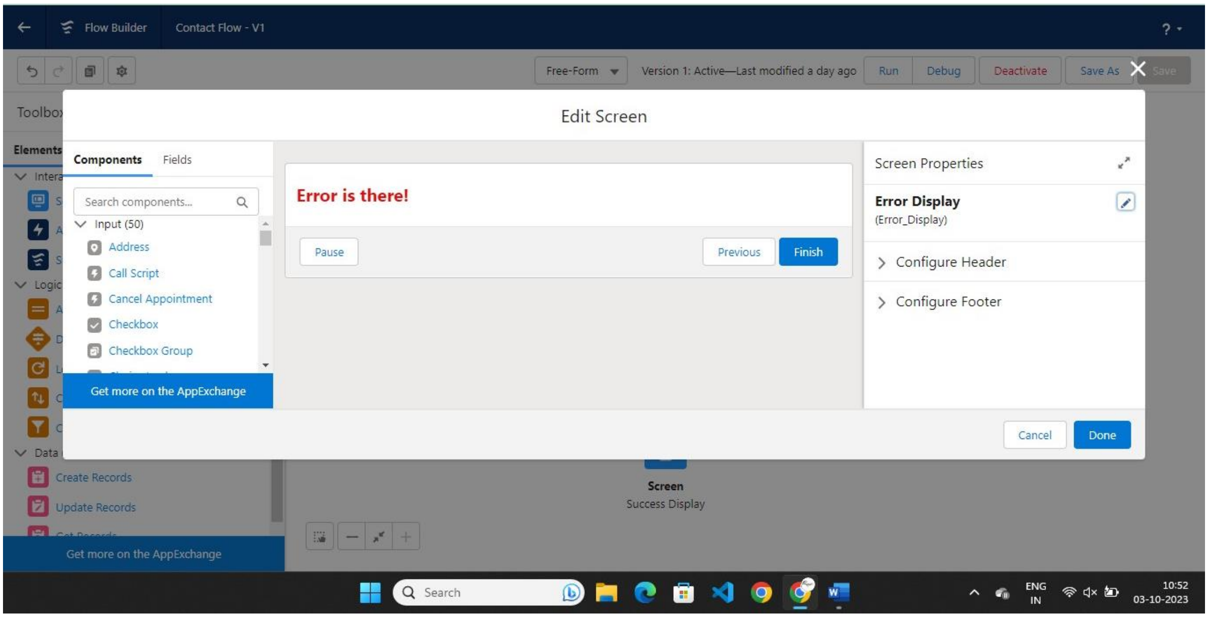

Run Again
Job Form
Upload Attachments
Upload Files
Or drop files
Debug Details
CREATE RECORDS: createRecord
Create one Contact record where:
Upload Files
book.pdf
1 MB
1 of 1 file uploaded
Done
Transaction Committed
Any records that the flow was ready to create, update, or delete were committed to the database.



Step 7: Create a Finish Screen

Add a final screen where you can thank the user for completing the survey and provide any necessary information or instructions.

Step 8: Connect the Screens

Connect the screens and elements in the desired order by dragging connectors between them.

Step 9: Set the Flow Properties

Click on the canvas and go to the Properties tab on the right to set the flow's name, description, and other settings.

Step 10: Activate the Flow

After designing the flow, click "Save" and then "Activate" to make it available for users.