

SALESFORCE DEVELOPER (NAAN MUDHALVAN)

ASSIGNMENT 1

NAME: SHRI SHALINI M

REG NO: 611220205033

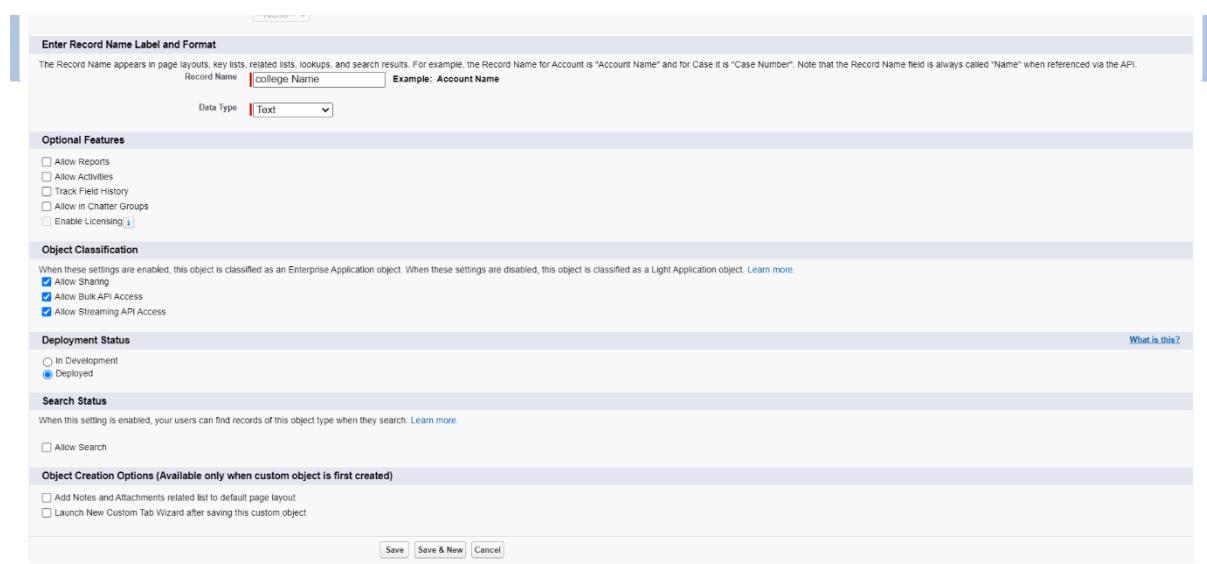
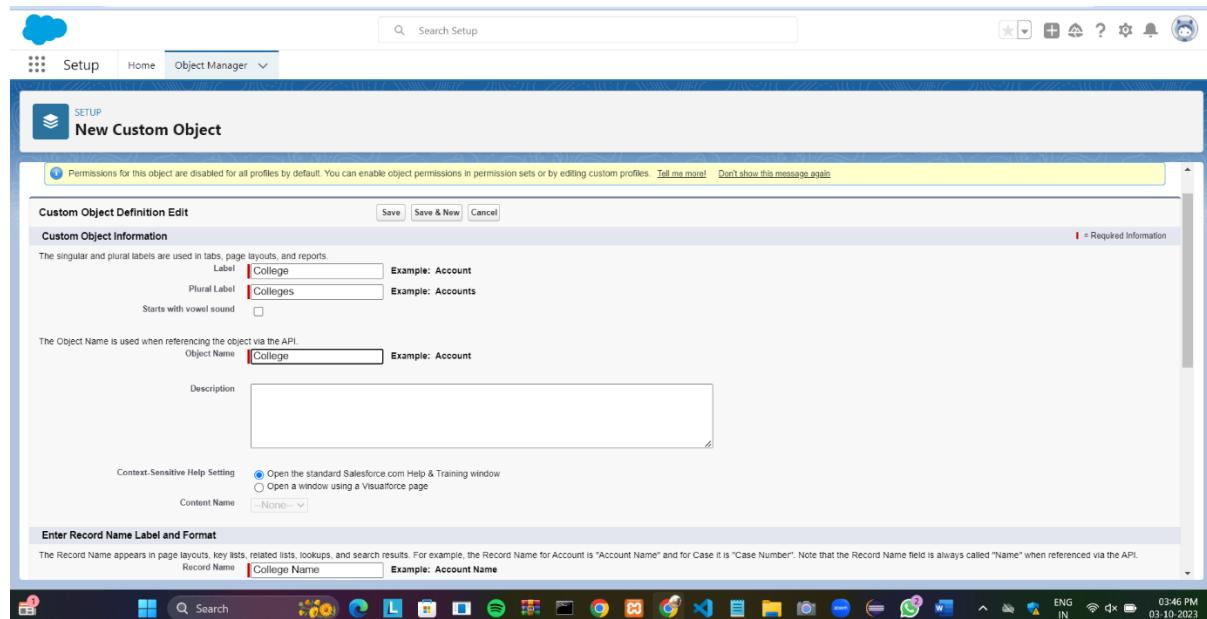
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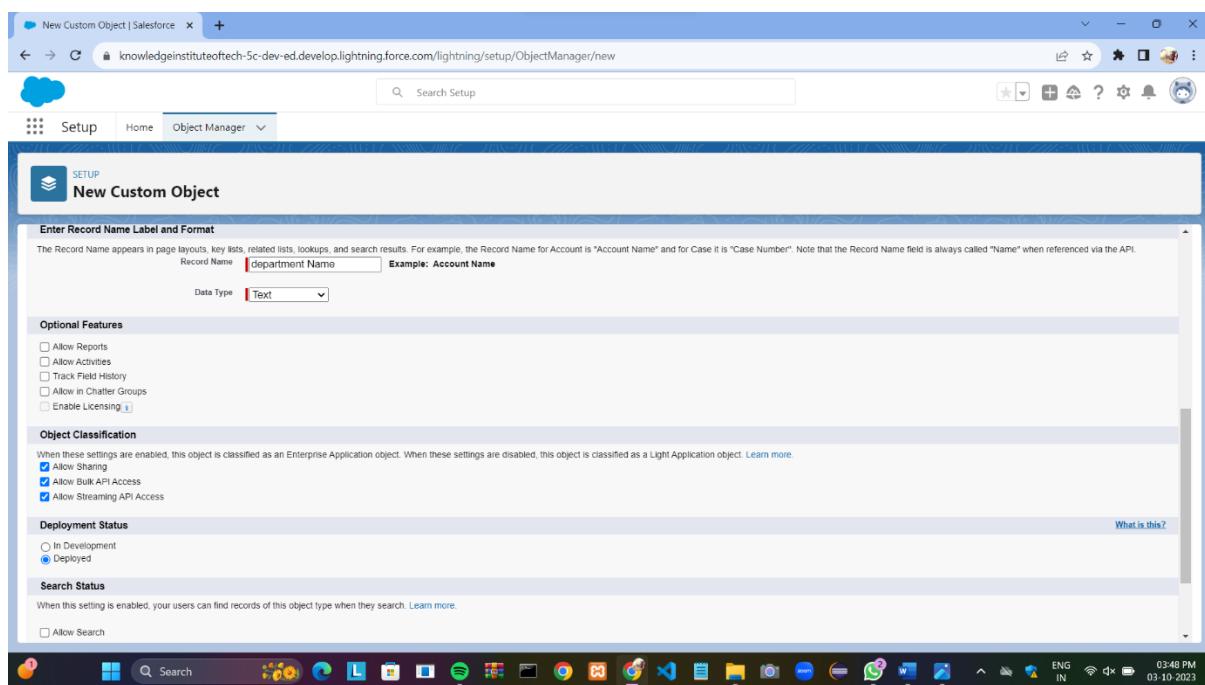
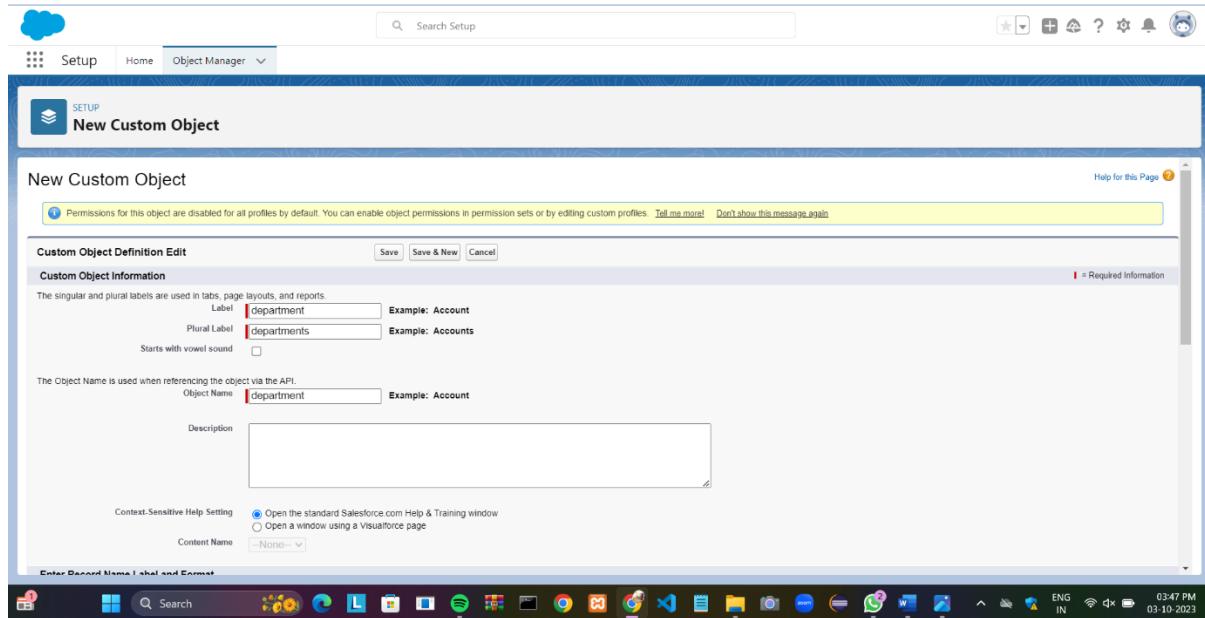
1.Create a Master-Detail Relationship between two Custom objects and also create a Roll Up Summary Field to Calculate total number of records.

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.

New Custom Field

Step 1. Choose the field type

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

Data Type

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 ownership 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 rollup 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.

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.

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.

External Lookup Relationship

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

Checkbox

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

Currency

Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

Date

Allows users to enter a date or pick a date from a popup calendar.

INFORMATION TECHNOLOGY | College | Salesforce | New Tab

knowledgeinstituteoftech-5c-dev-ed.develop.lightning.force.com/lightning/r/department__c/a085j00000H5grfAAB/view

Naan mudhalvan Home Colleges departments

INFORMATION TECHNOLOGY

Related Details

Department Name: INFORMATION TECHNOLOGY

College: KIOT

Created By: shri Shalini, 03/10/2023, 11:05 am

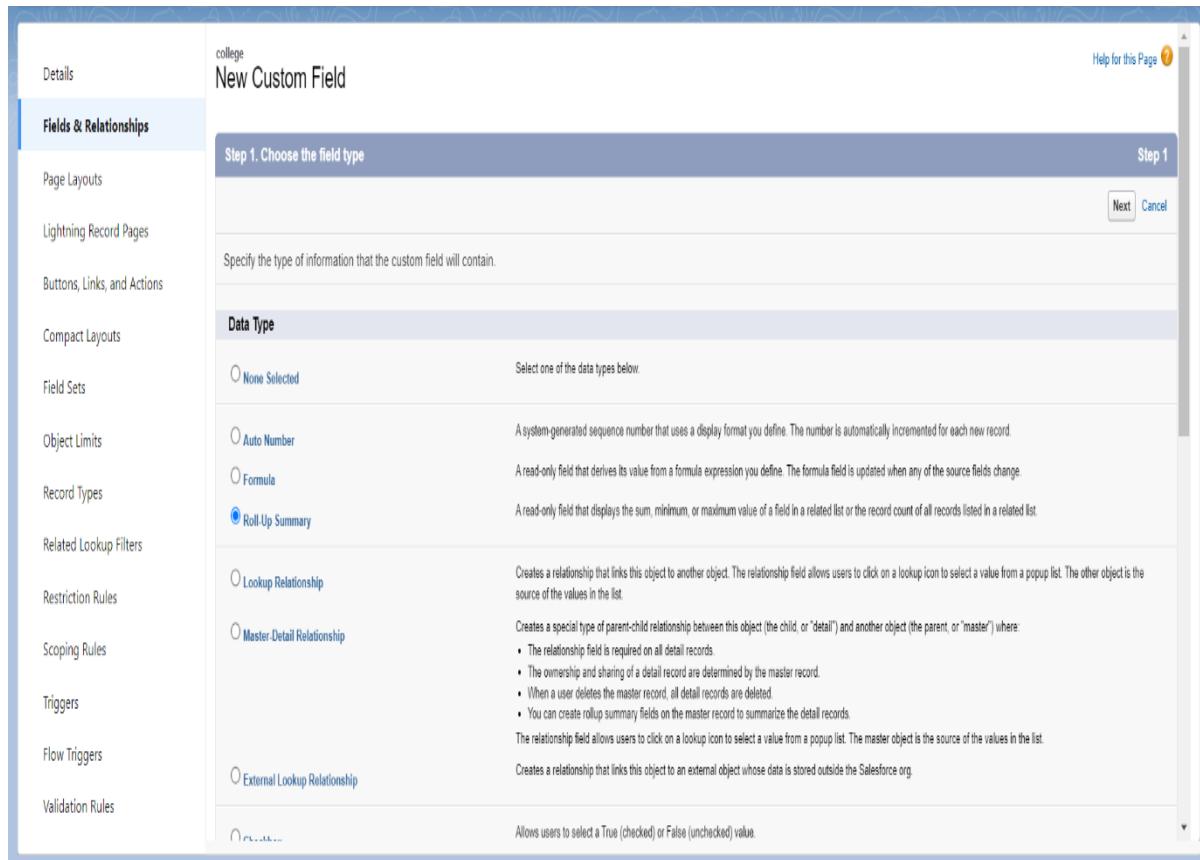
Last Modified By: shri Shalini, 03/10/2023, 11:05 am

History

30°C Haze Search

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

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

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

Action	Label	Tab Style	Description
Edit Del	Book1	Box	
Edit Del	Research Proposal	Square	
Edit Del	student	Box	

Web Tabs

No Web Tabs have been defined

Visualforce Tabs

No Visualforce Tabs have been defined

Lightning Component Tabs

No Lightning component tabs have been defined

Lightning Page Tabs

No Lightning Page Tabs have been defined

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

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	Visible	Read-Only
Data Type	Roll-Up Summary	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Field Name	Total_count	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Description		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

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	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cloud Kicks Admin	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cross 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"/>
Force.com - Ann Subscription User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

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

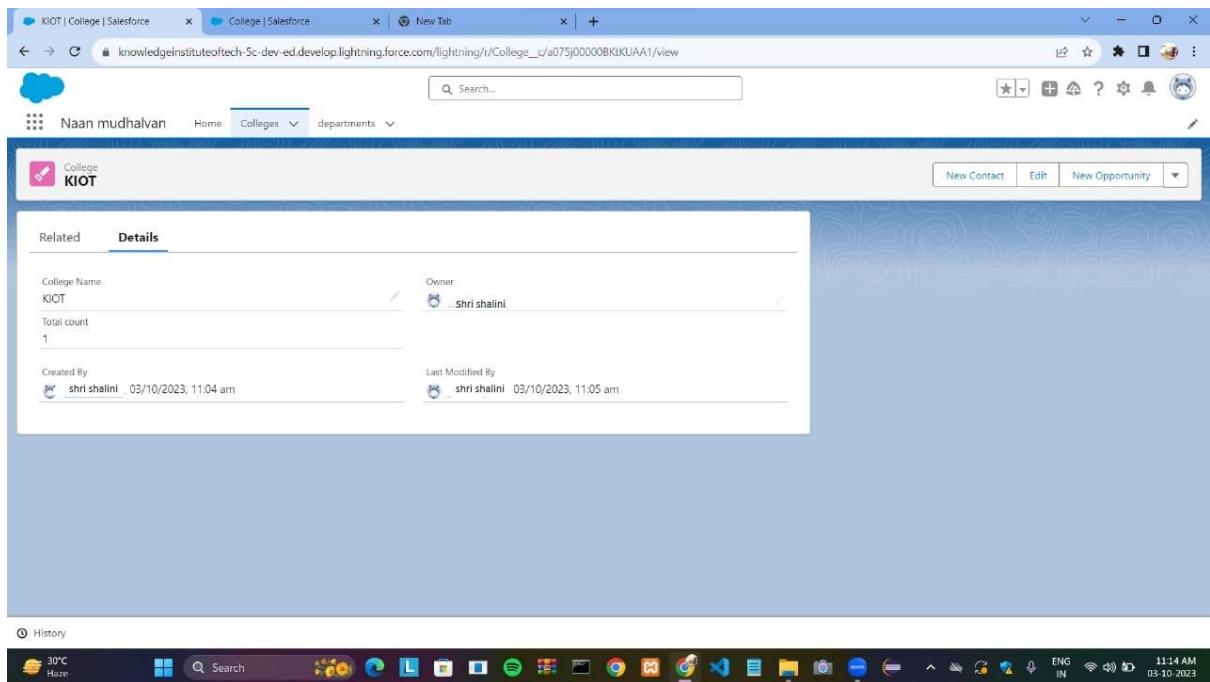
Select Roll-Up Type

<input checked="" type="radio"/> COUNT	
<input type="radio"/> SUM	
<input type="radio"/> MIN	Field to Aggregate: <input type="button" value="None"/>
<input type="radio"/> MAX	

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.

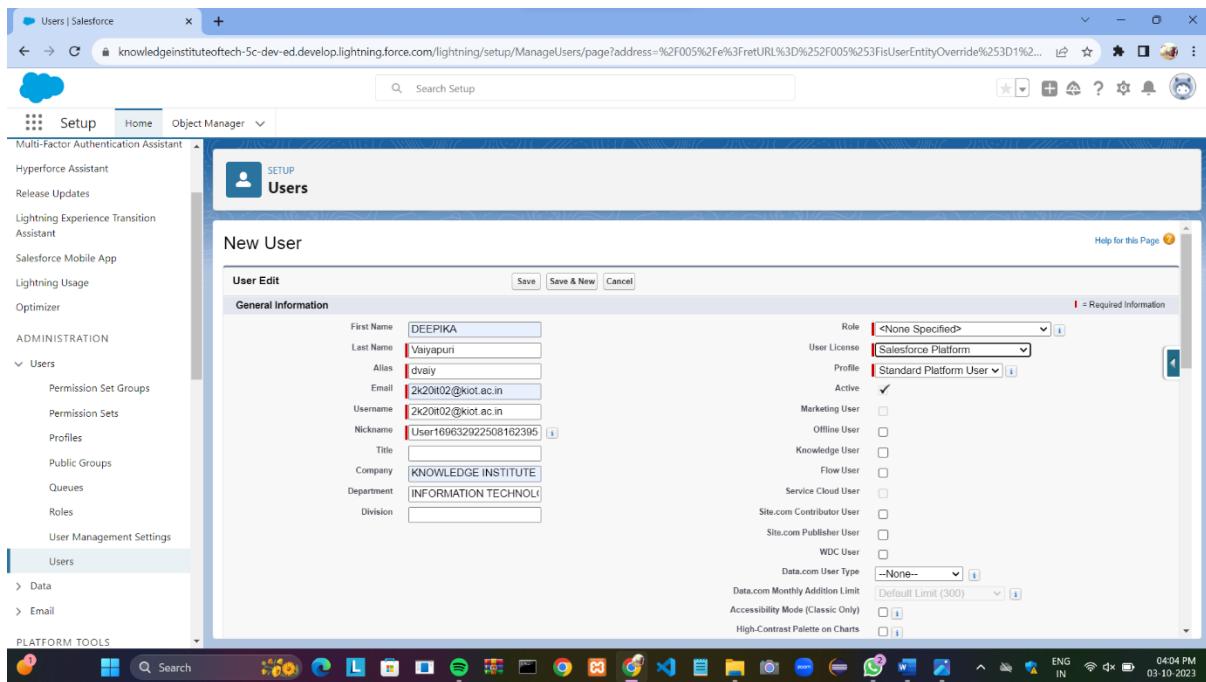
Assign a Password:

- 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.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Chatter Expert	Chatter	chatty@005@00000cigean.hgprvcajyf@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	S.Y. DEEPIKA	DS_Y	deepika@21.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	S. DEEPIKA	ds	svideepika002@gmail.com		<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	User_Integration	Integ	integration@005@00000cigean.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	User_Security	sec	insightssecurity@005@00000cigean.com	Marketing Team	<input checked="" type="checkbox"/>	Analytics Cloud Security User
<input type="checkbox"/>	Vanyaoun_Decoka	ds.v	2k20@02@kxot.ac.in		<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	Vanyaoun_Sunya	svaly	sunya18@gmail.com	Eastern Sales Team	<input checked="" type="checkbox"/>	Partner App Subscription User



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.

The screenshot shows the 'Sharing Settings' page in the Salesforce Setup. The left sidebar has a search bar with 'sharing' typed in, and a 'Sharing Settings' link under 'Sharing'. The main content area is titled 'Sharing Settings' and contains a table titled 'Organization-Wide Defaults'. The table lists various objects (Lead, Account and Contract, Contact, Order, Asset, Opportunity, Case, Campaign, Campaign Member, User, Activity, Calendar, Price Book, Product) with their internal access (Default Internal Access) and external access (Default External Access). The 'Grant Access Using Hierarchies' column contains checkmarks. A blue bar at the bottom of the table indicates it is editable.

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	✓
Account and Contract	Public Read/Write	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Order	Controlled by Parent	Controlled by Parent	✓
Asset	Controlled by Parent	Controlled by Parent	✓
Opportunity	Public Read/Write	Private	✓
Case	Public Read/Write/Transfer	Private	✓
Campaign	Public Full Access	Private	✓
Campaign Member	Controlled by Campaign	Controlled by Campaign	✓
User	Public Read Only	Private	✓
Activity	Private	Private	✓
Calendar	Hide Details and Add Events	Hide Details and Add Events	✓
Price Book	Use	Use	✓
Product	Public Read/Write	Public Read/Write	✓

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 User A and User B can view Account records.

Record-Level Security:

- Implement record-level security using Criteria-Based Sharing Rules.
- Create a sharing rule that shares Account records owned by User A with User A and records owned by User B with User B.
- For the sharing rule criteria, specify that records owned by User A are shared with User A, and records owned by User B are shared with User B.

Ownership:

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

Organization-Wide Defaults:

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

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

The screenshot shows the Salesforce 'Permission Sets' page under the 'Users' section of the Setup menu. The page title is 'Permission Sets'. It displays a table of existing permission sets, each with a checkbox, an action column (e.g., 'Action', 'Delete', 'Clone'), a 'Permission Set Label' column, a 'Description' column, and a 'License' column. The table includes rows for various roles like 'Buyer', 'Commerce Admin', 'Contact Center Agent', etc. The 'Description' column provides a brief overview of the permissions granted by each set. The 'License' column indicates the specific license required for each set. The interface includes standard Salesforce navigation elements like a search bar, a help link, and a breadcrumb trail.

The screenshot shows the 'Create' page for a new permission set under the 'Users' section of the Setup menu. The page title is 'Permission Set Create'. It has two main sections: 'Enter permission set information' and 'Select the type of users who will use this permission set'. In the first section, fields include 'Label' (set to 'salesmanager'), 'API Name' (set to 'Salesmanager'), and 'Description'. A 'Session Activation Required' checkbox is also present. In the second section, there are instructions about who will use the permission set and how many licenses are needed. A note at the bottom asks if the user is not sure what a permission set license is, with a 'Learn more here' link. The page includes standard Salesforce navigation elements like a search bar, a help link, and a breadcrumb trail.

Setup Home Object Manager

Search Setup

Permission Sets

Permission Set salesmanager

Object Settings

Object Name	Object Permissions	Total Fields	Tab Settings
Accounts	No Access	40	--
AI Insight Reasons	No Access	--	--
AI Record Insights	No Access	--	--
Alternative Payment Methods	No Access	27	--
API Anomaly Event Stores	No Access	14	--
Age Analytics Query Requests	No Access	--	--
Application Usage Assignments	No Access	--	--
Appointment Categories	No Access	3	--
Appointment Invitations	No Access	17	--
Appointment Invitees	--	4	--
Appointment Schedule Aggregates	No Access	--	--
Appointment Schedule Logs	No Access	--	--
Appointment Topic Time Slots	No Access	6	--
Asset Actions	No Access	30	--
Asset Action Sources	No Access	18	--
Asset Relationships	--	10	--
Assets	No Access	42	--
Asset State Periods	No Access	11	--

Video Tutorial | Help for this Page

Object Settings Overview > Object Settings

Object Name: Bank

Tab Settings:

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

https://artificialintelligence-d-dev-ed-develop.my.salesforce.com/one/one.app#/alohaRedirect/0PS5j000008Phck?i=EntityPermissions&a=0115j000002bTh&isdp=p1

Setup Home Object Manager

Search Setup

Permission Sets

Permission Set salesmanager

Object Settings

Object Name: Bank

Tab Settings:

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

https://artificialintelligence-d-dev-ed-develop.my.salesforce.com/one/one.app#/alohaRedirect/0PS5j000008Phck?i=EntityPermissions&a=0115j000002bTh&isdp=p1

artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2F0PS5j000008Phok%2Fe%3Fs%3DEntityPermissions%26o... Finish update

SETUP

Permission Sets

Permission Set
salesmanager

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

Permission Set Overview > Object Settings ▾ Bank

Bank Save | Cancel

Tab Settings

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

Object Permissions

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

Field Permissions

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

Video Tutorial | Help for this Page

Search Setup

User Management Settings

Users

Feature Settings

- Data.com
- Prospector **Users**

Service

- Embedded Service
- Messaging for In-App and Web User Verification

User Interface

- Action Link Templates
- Actions & Recommendations

App Menu

artificialintelligence-d-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2F0PS5j000008Phok%2Fe%3Fs%3DEntityPermissions%26o... Finish update

SETUP

PERMISSION SET 'SALESMANAGER'

salesmanager

Current Assignments

Add Assignment

No assignments defined.



Search Setup

User Management Settings

Users

Feature Settings

- Data.com
- Prospector **Users**

Service

- Embedded Service
- Messaging for In-App and Web User Verification

User Interface

- Action Link Templates
- Actions & Recommendations

App Menu

The screenshot shows the Salesforce Setup interface with the 'Permission Sets' section selected. A modal window titled 'Select Users to Assign' is open, displaying a list of users. The user 'madhu b' is selected, indicated by a checked checkbox next to their name.

The screenshot shows the Salesforce Setup interface with the 'Permission Sets' section selected. A modal window titled 'Experience Profile Manager' is open, displaying the 'Current Assignments' table. One assignment is listed for the user 'shri shalini'.

Full Name	Active	Role	Profile	User License	Expires On
shri shalini	✓		System Administrator	Salesforce	

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:

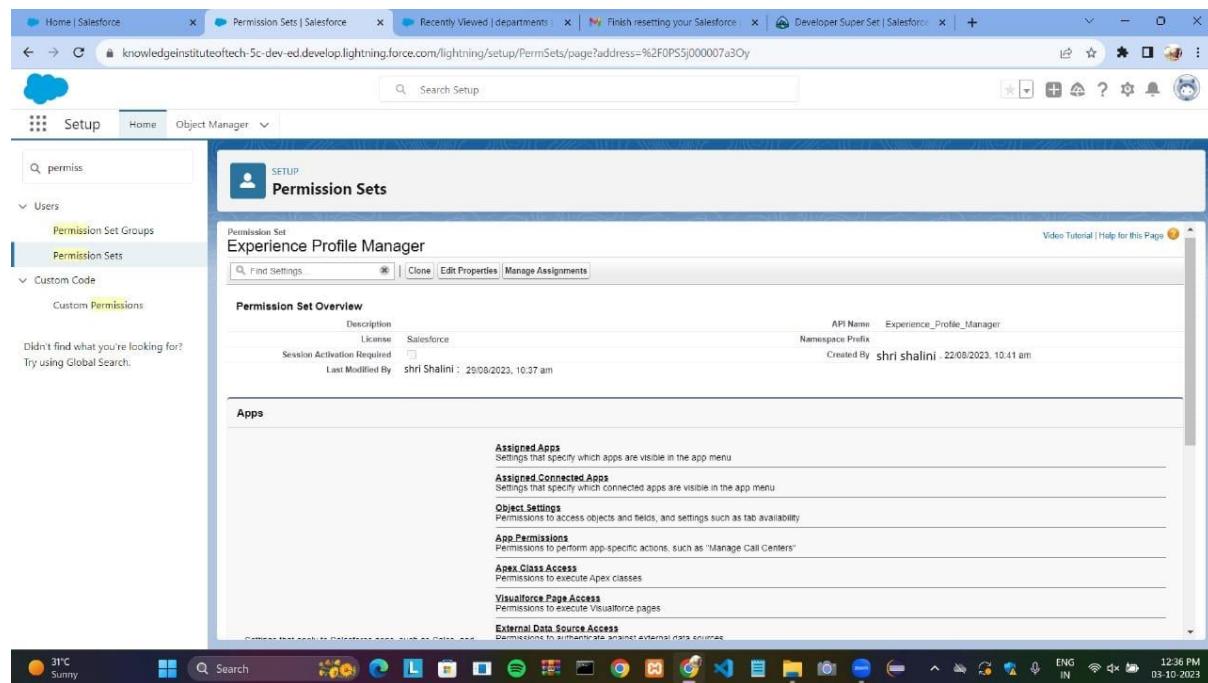
- Assign the newly created Permission Set with the "Delete" permission to the user you want to grant this access to.

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:

Enter the name of the new profile.

You must select an existing profile to clone from.

Existing Profile	Analytics Cloud Integration User
User License	Analytics Cloud Integration User
Profile Name	Standard

Help for this Page

Save Cancel

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

- Search Bar:** Search Setup
- Left Navigation:** Q pro, Hyperforce Assistant, Users (Profiles selected), Data (Mass Transfer Approval Requests), Feature Settings (Data.com, Prospector Preferences, Prospector Users, Functions), Marketing (Lead Processes), Sales (Products).
- Profile Overview:** Profile Standard, Description: User License - Analytics Cloud Integration User, Assigned Users: Custom Profile (checkbox checked), Last Modified By: Ramya Sri R., 03/10/2023, 12:41 pm.
- Apps Section:** Assigned Apps, Assigned Connected Apps, Object Settings, Ann Permissions.
- System Bar:** Type here to search, various icons, 31°C Sunny, ENG 12:43 PM IN 10/3/2023.

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

- Search Bar:** Search Setup
- Left Navigation:** Q perm, Users (Permission Set Groups, Permission Sets selected), Custom Code, Custom Permissions.
- Experience Profile Manager:** Permission Set Overview > Object Settings > Accounts.
- Accounts Tab Settings:** Available (checkbox checked), Visible (checkbox unchecked).
- 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 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"/>

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.

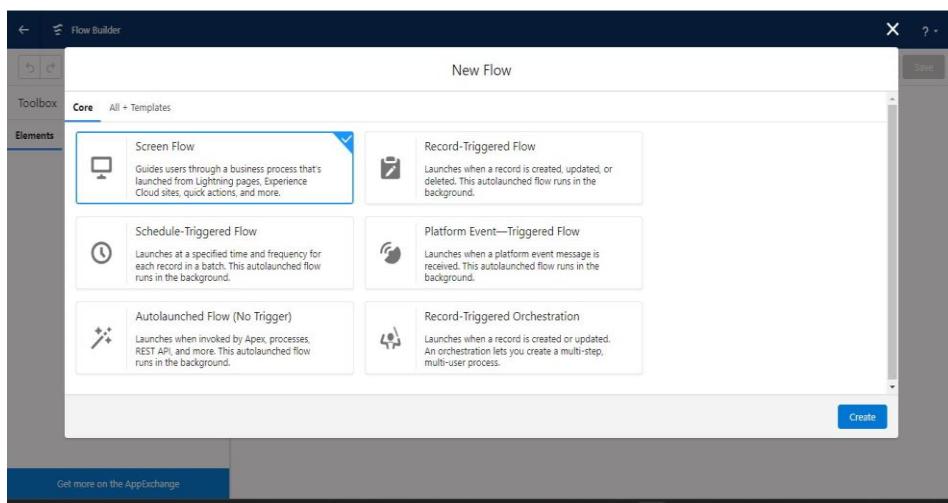
4.Create a screen flow for a basic survey to fill in the details for any form.

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".

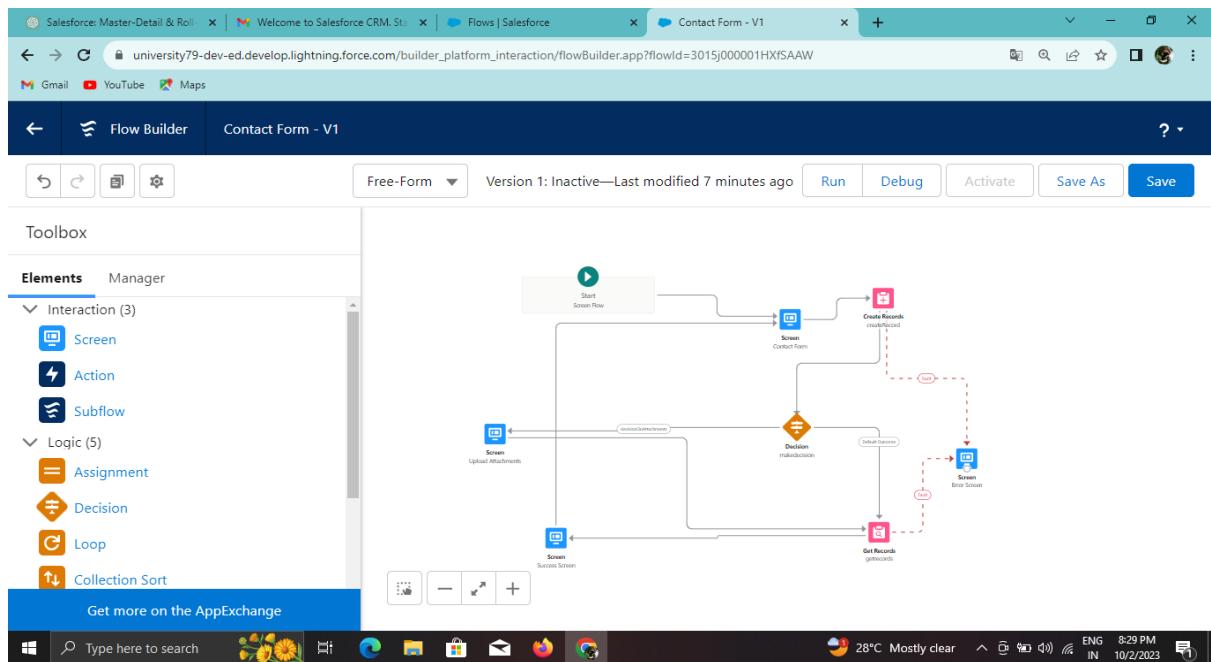
Step 2: Create a flow

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



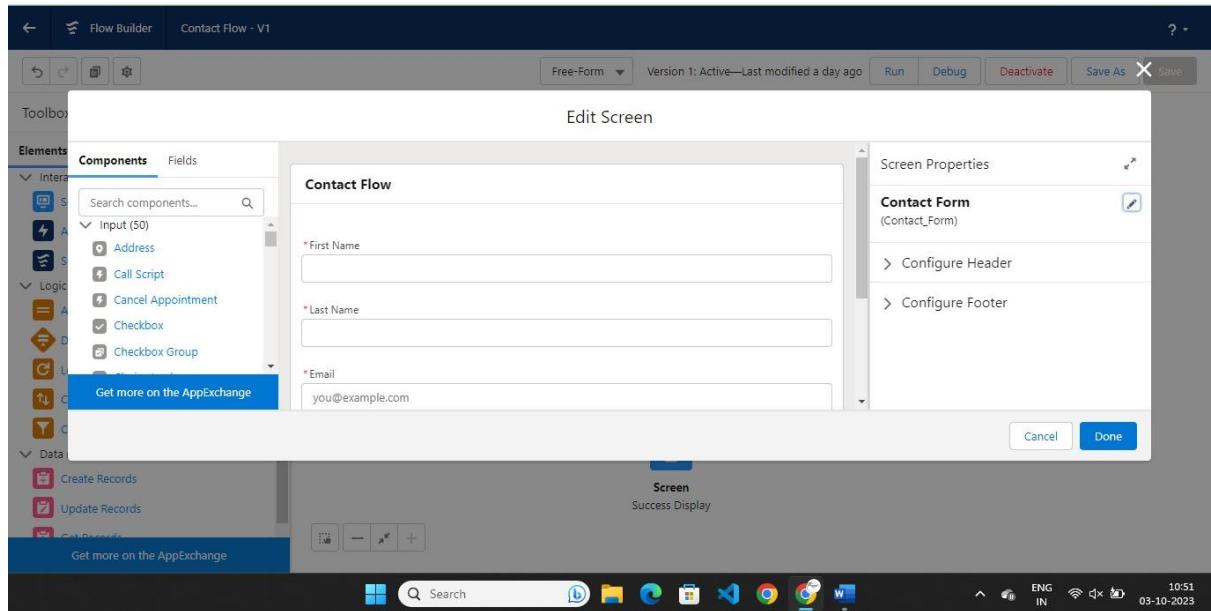
Step 3 : Add Screen Elements

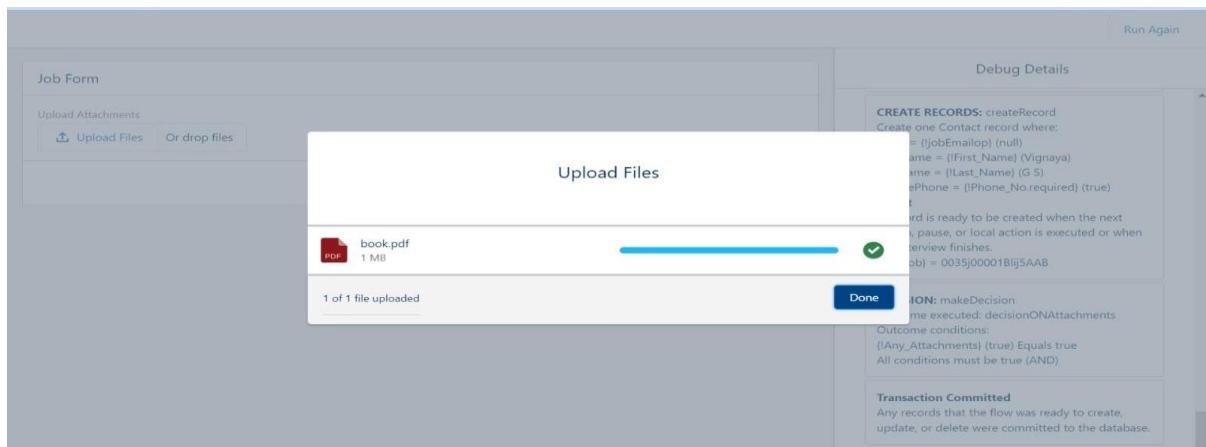
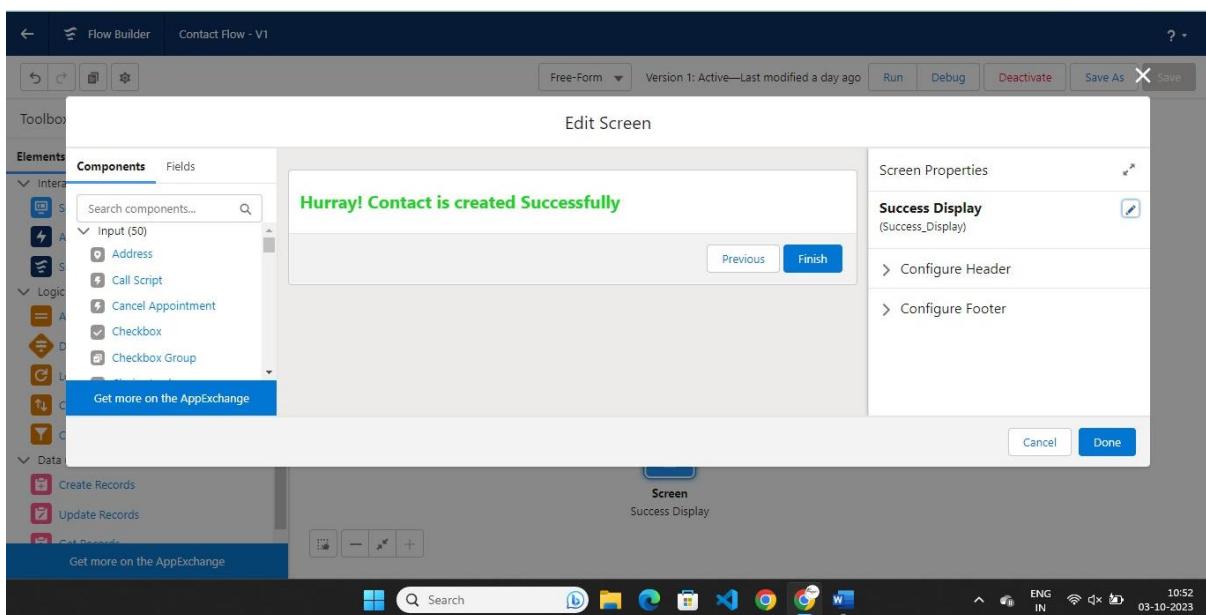
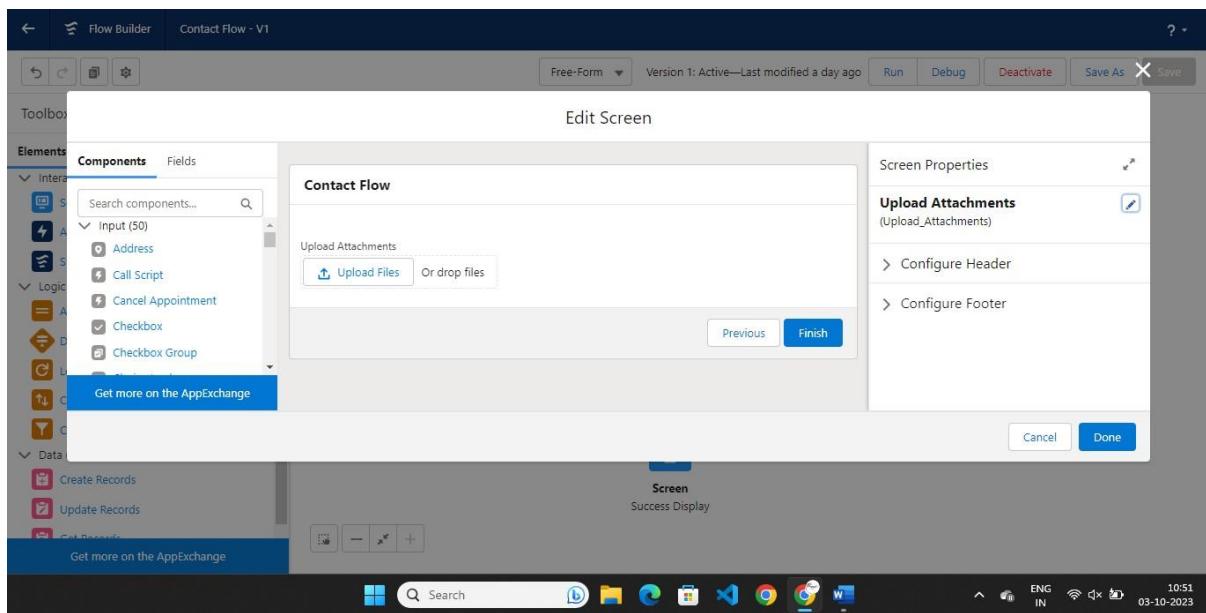
1. Move a "Screen" component into position on the canvas. This will be where your flow will begin.
2. To configure an element of the screen, click on it.
3. Include language and instructions on this screen to explain the survey and what data are needed.
4. To allow visitors to enter survey information, 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.

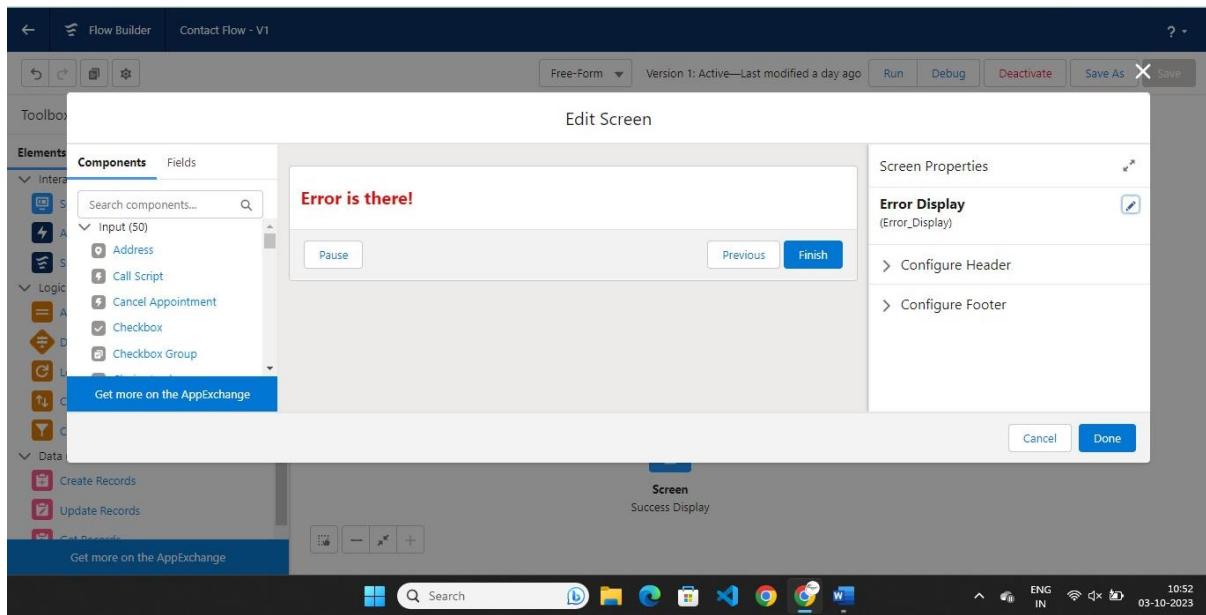


Step 4: construct Variables

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.







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.