NAAN MUDHALVAN

SALESFORCE DEVELOPER

ASSIGNMENT 1

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NM ID : au611220205045

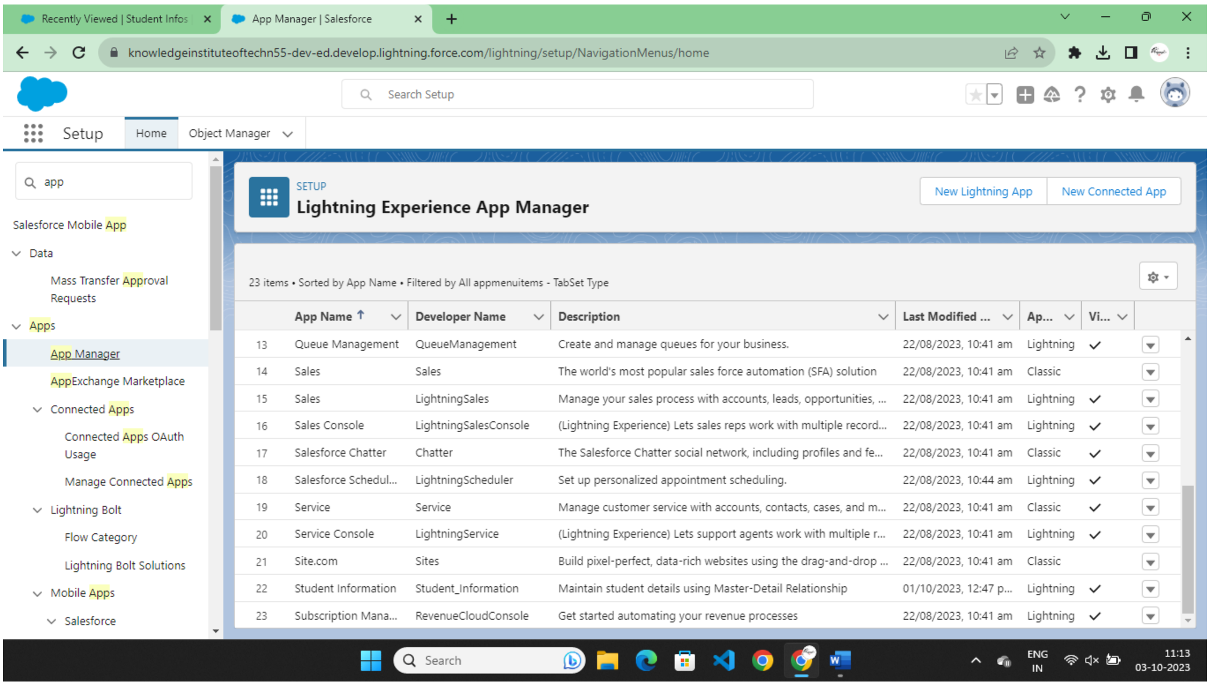
REG NO. : 611220205045

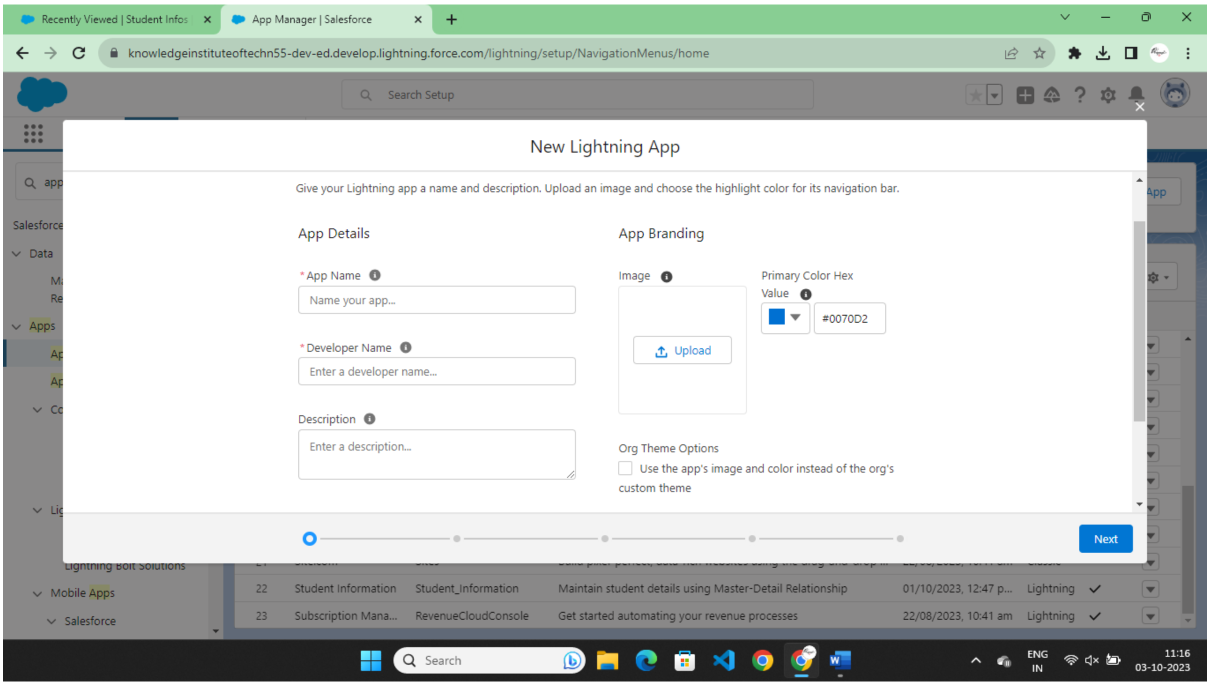
BRANCH : B.TECH IT – IV YEAR

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

Assuming you have two custom objects, let's call them "Parent_Object__c" and "Child_Object__c," and you want to create a Master-Detail Relationship from Child_Object__c to Parent_Object__c, and a Roll-Up Summary Field on Parent_Object__c to count the related Child_Object__c records.

Creating of Lightning App:




New Lightning App
Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.
App Details
App Branding
* App Name
Name your app...
* Developer Name
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Upload
Primary Color Hex Value
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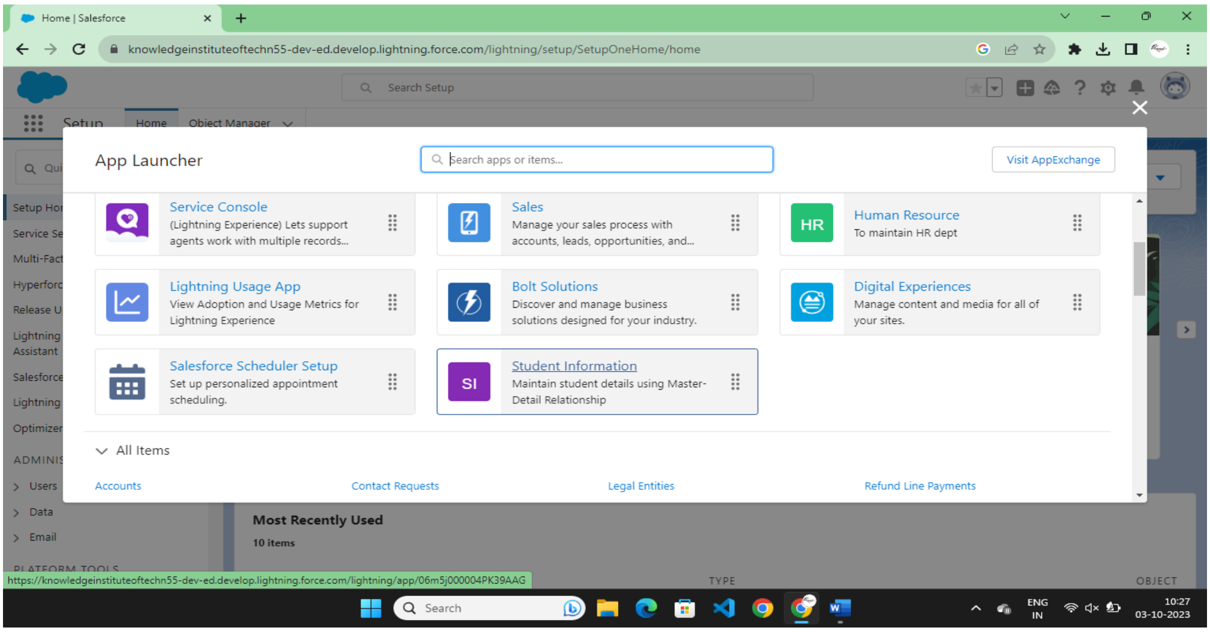
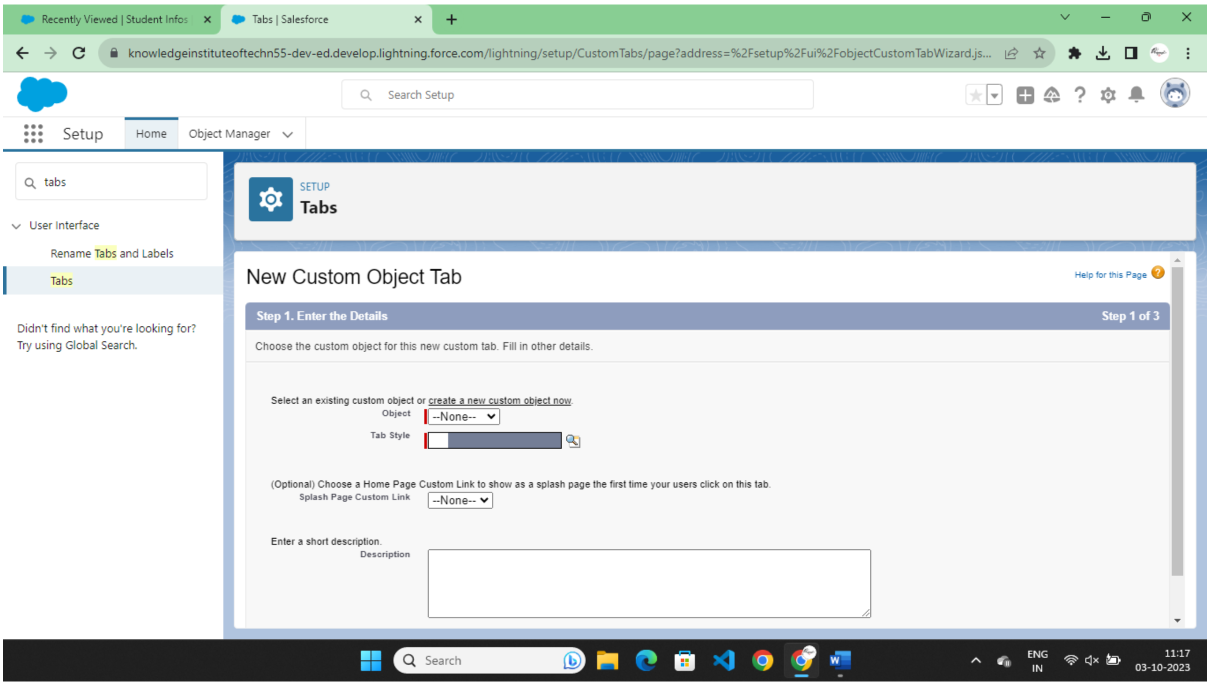
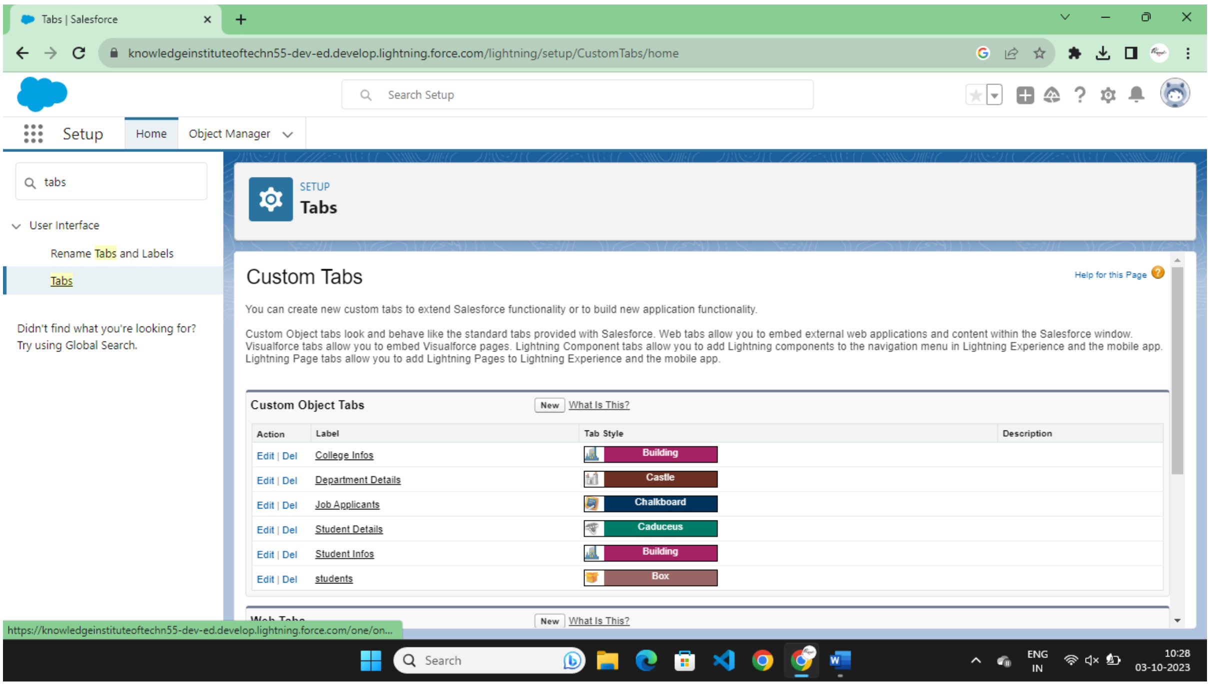
Org Theme Options
Use the app's image and color instead of the org's custom theme
Next


App Launcher
Search apps or items...
Visit AppExchange
Service Console
(Lightning Experience) Lets support agents work with multiple records...
Sales
Manage your sales process with accounts, leads, opportunities, and...
Human Resource
To maintain HR dept
Lightning Usage App
View Adoption and Usage Metrics for Lightning Experience
Bolt Solutions
Discover and manage business solutions designed for your industry.
Digital Experiences
Manage content and media for all of your sites.
Salesforce Scheduler Setup
Set up personalized appointment scheduling.
Student Information
Maintain student details using Master-Detail Relationship
All Items
Accounts
Contact Requests
Legal Entities
Refund Line Payments

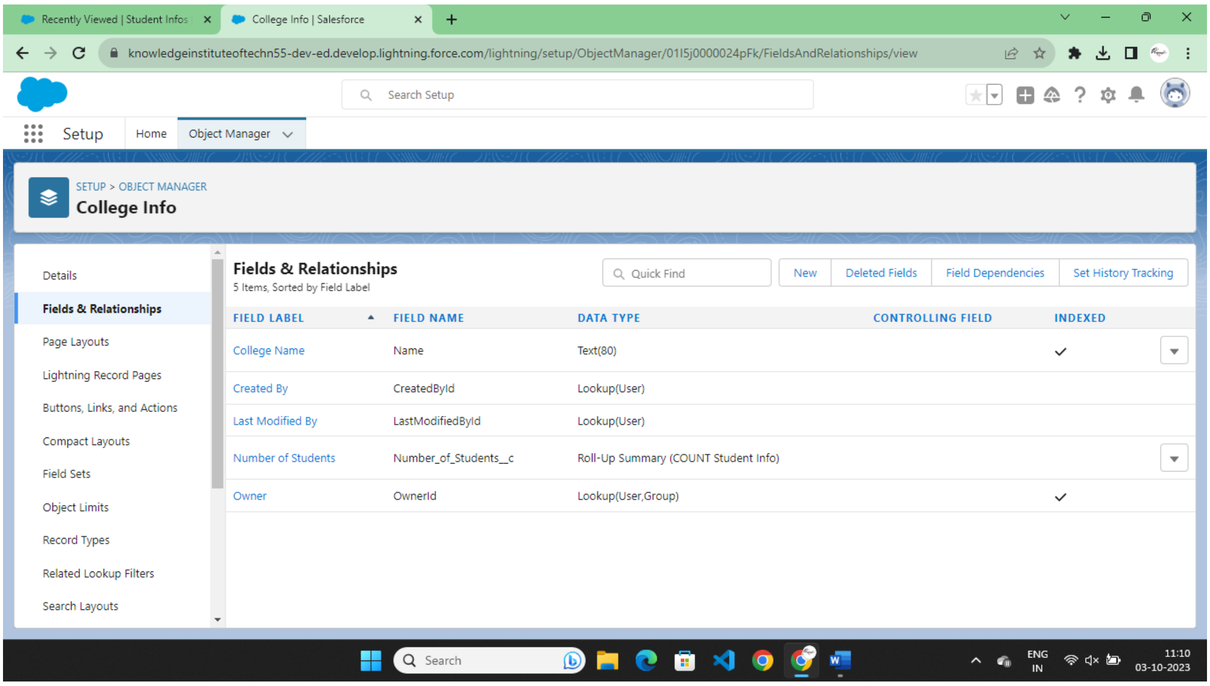
Tabs:

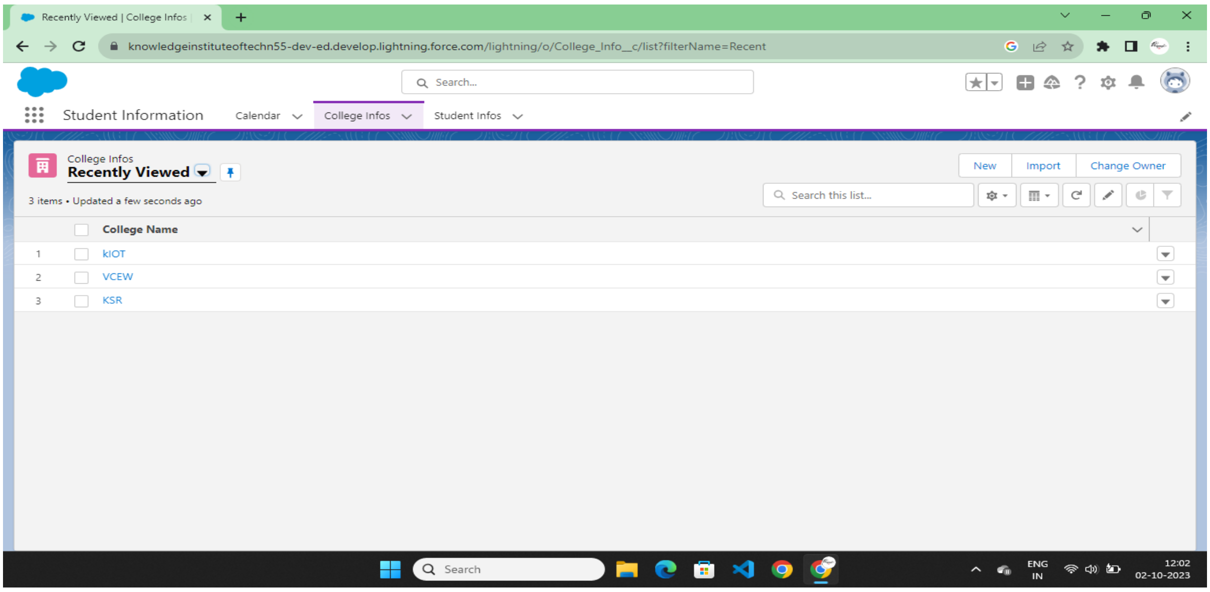




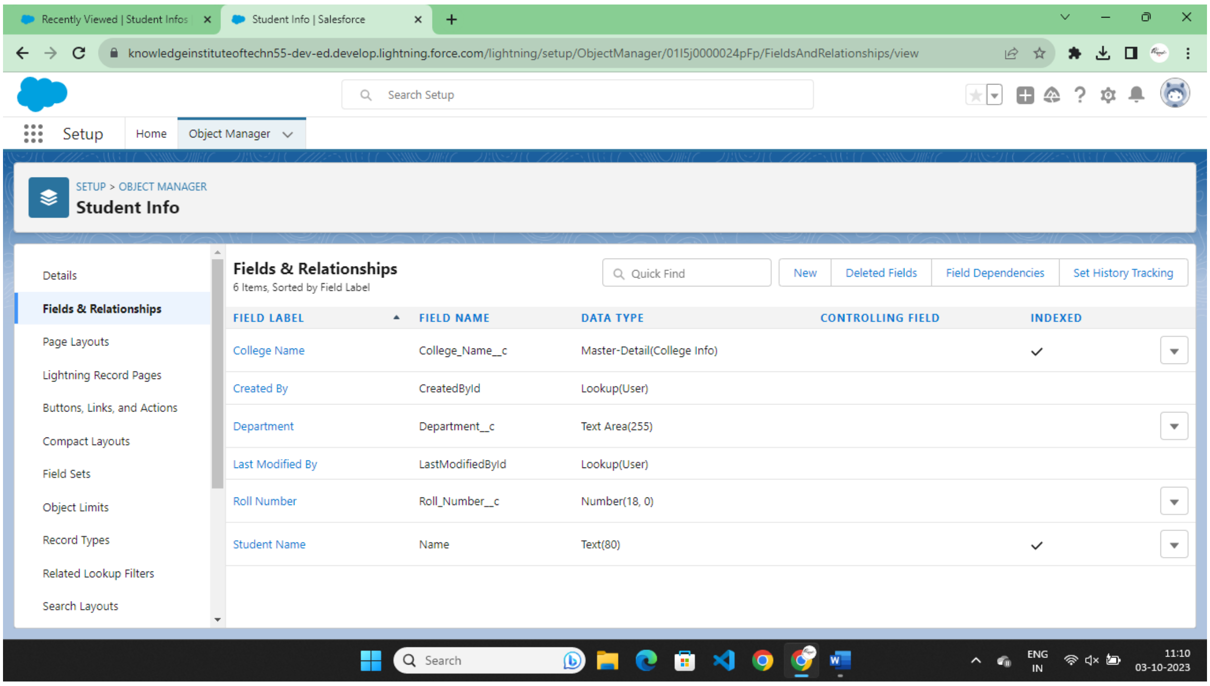
1.Create Custom Objects:

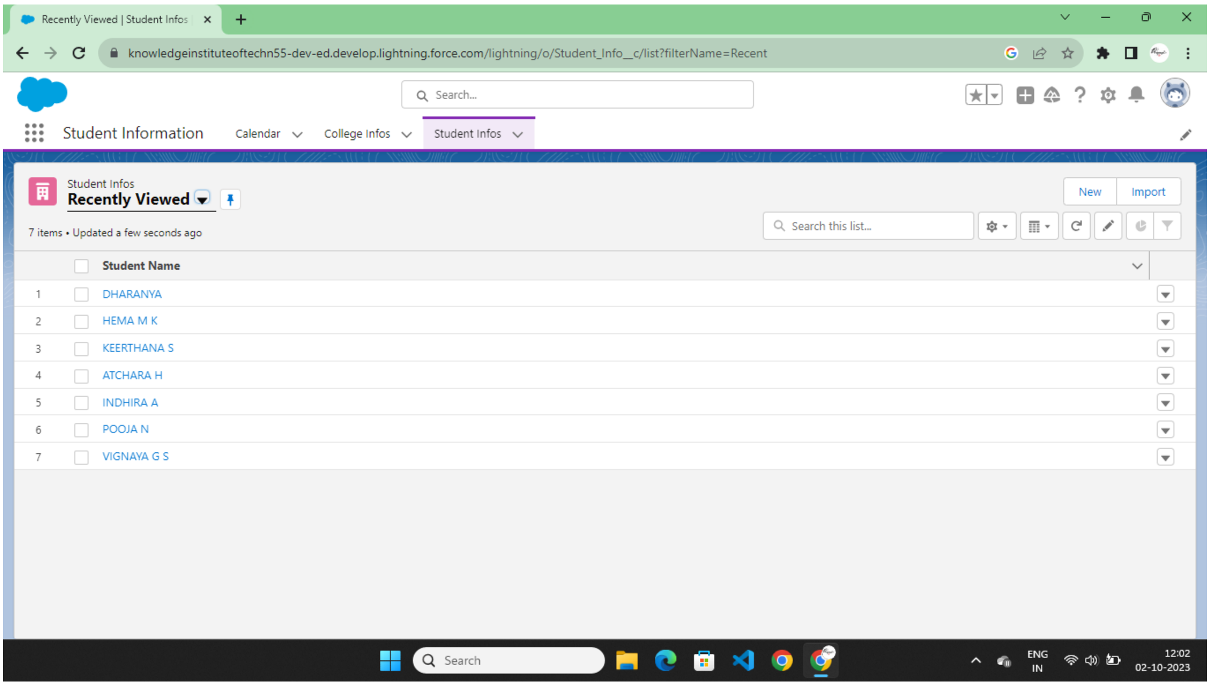
- Create the "Parent_Object__c" custom object if you haven't already.





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





2.Create Master-Detail Relationship:

- Go to "Setup" by clicking on the gear icon in the top-right corner.
- Under "Objects and Fields," click on "Object Manager."

- Click on "Child_Object__c" to open its settings.

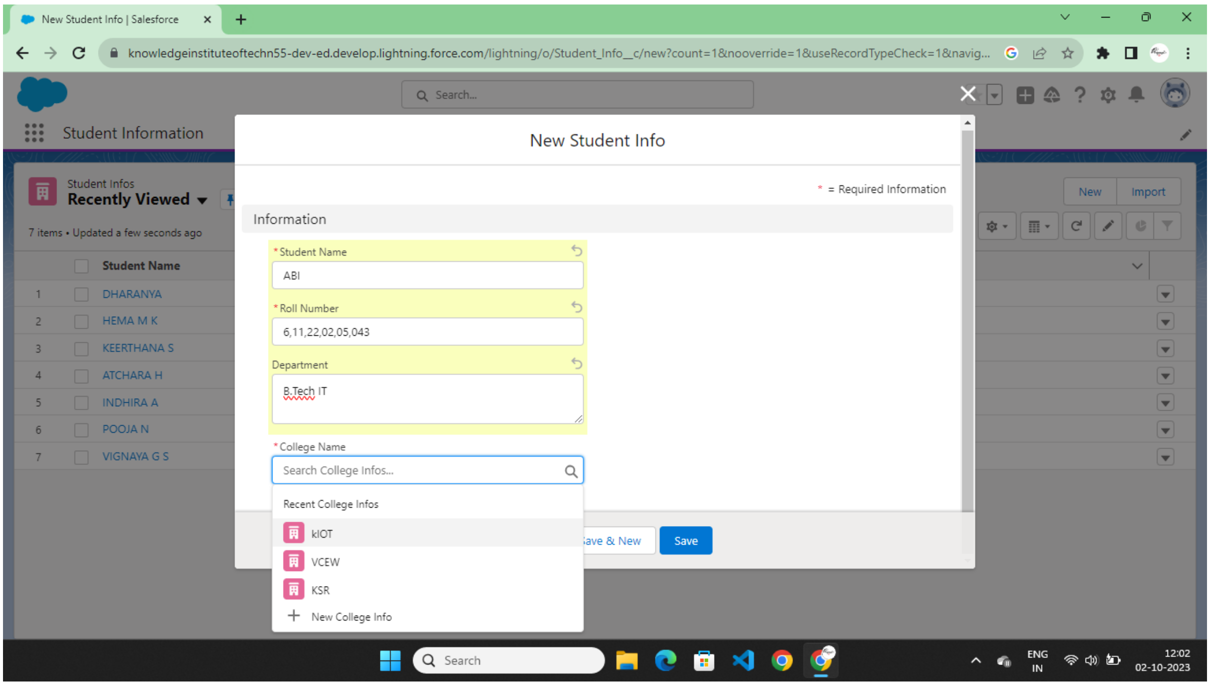
- In the "Fields & Relationships" section, click on "New Relationship."

- Choose "Master-Detail Relationship" as the type of relationship.

- Select "Parent_Object__c" as the parent object.

- Give the relationship a meaningful name, e.g., "Parent Relationship."

- Define other settings such as required or not, and click "Next" to finish the wizard.



3.Create Roll-Up Summary Field:

- After creating the Master-Detail Relationship, go back to the "Parent_Object__c" settings.

- In the "Fields & Relationships" section, click on "New" and select "Roll-Up Summary."

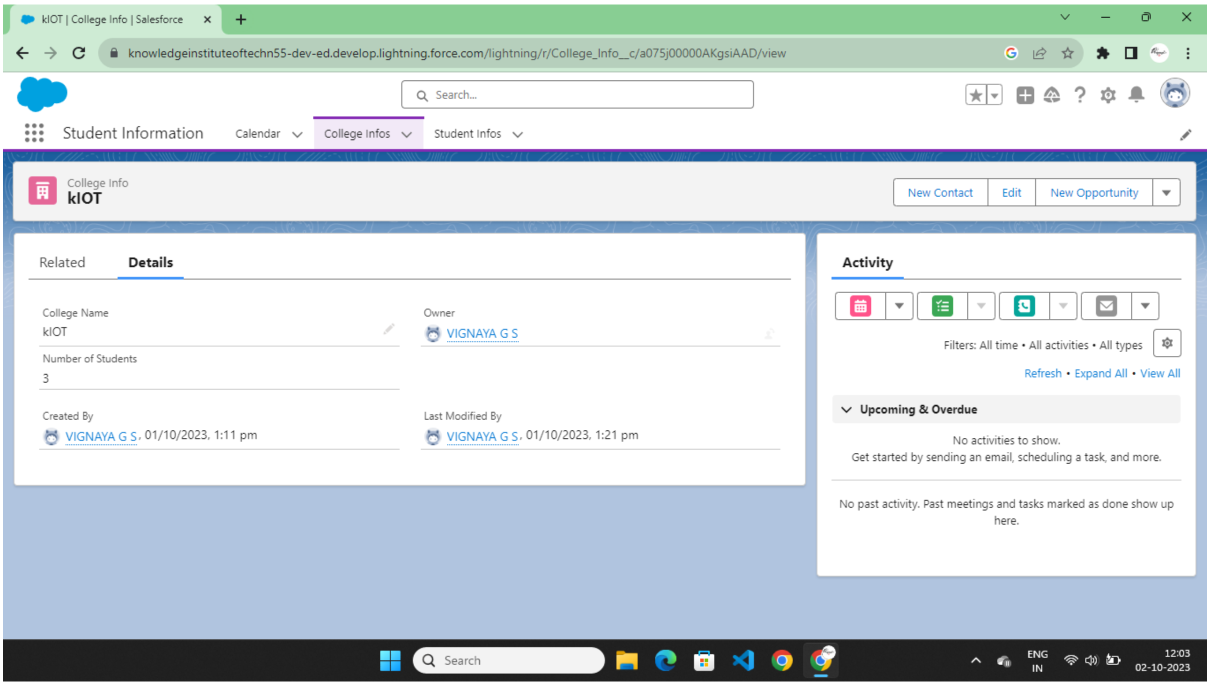
- Choose the "Child Relationship Name" (created in step 2, e.g., "Child_Object__r").

- Choose the aggregation operation, which is "Count" in this case.

- Define a meaningful field label (e.g., "Total Child Records").

- Optionally, define other field properties.

- Click "Next" and then "Save" to create the Roll-Up Summary Field.



Now you have successfully created a Master-Detail Relationship between the two custom objects and a Roll-Up Summary Field to calculate the total number of related records in Salesforce.

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:

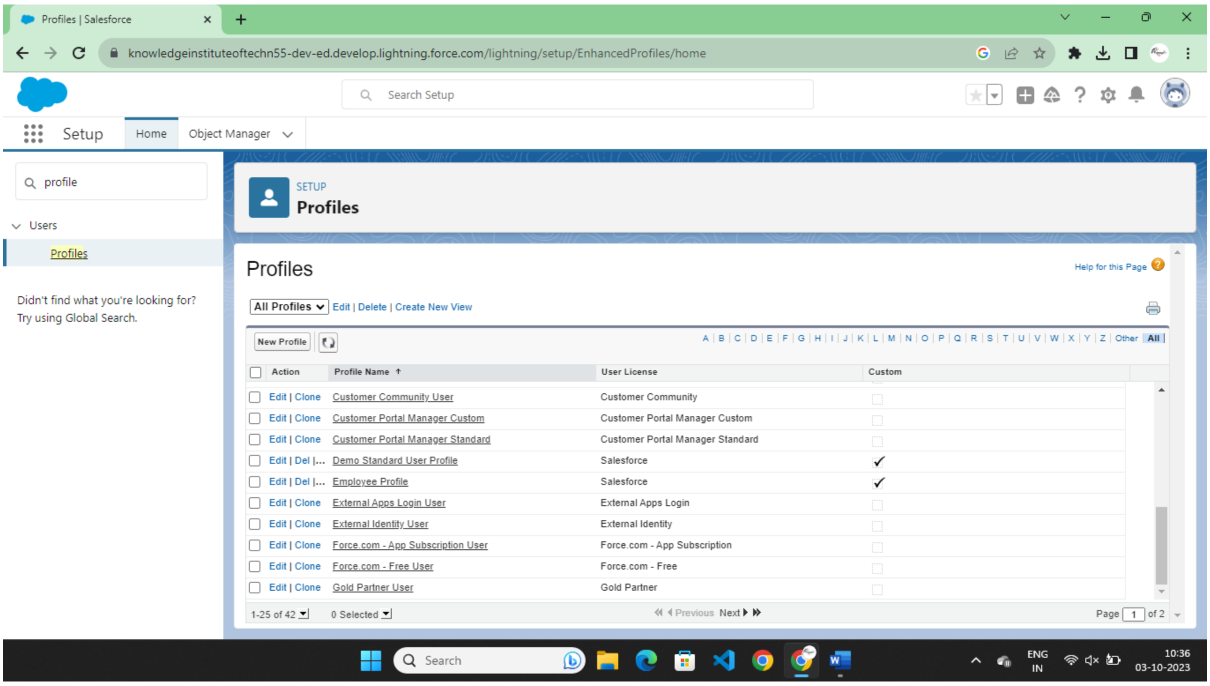
- After saving the user, you'll be prompted to assign a temporary password.

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

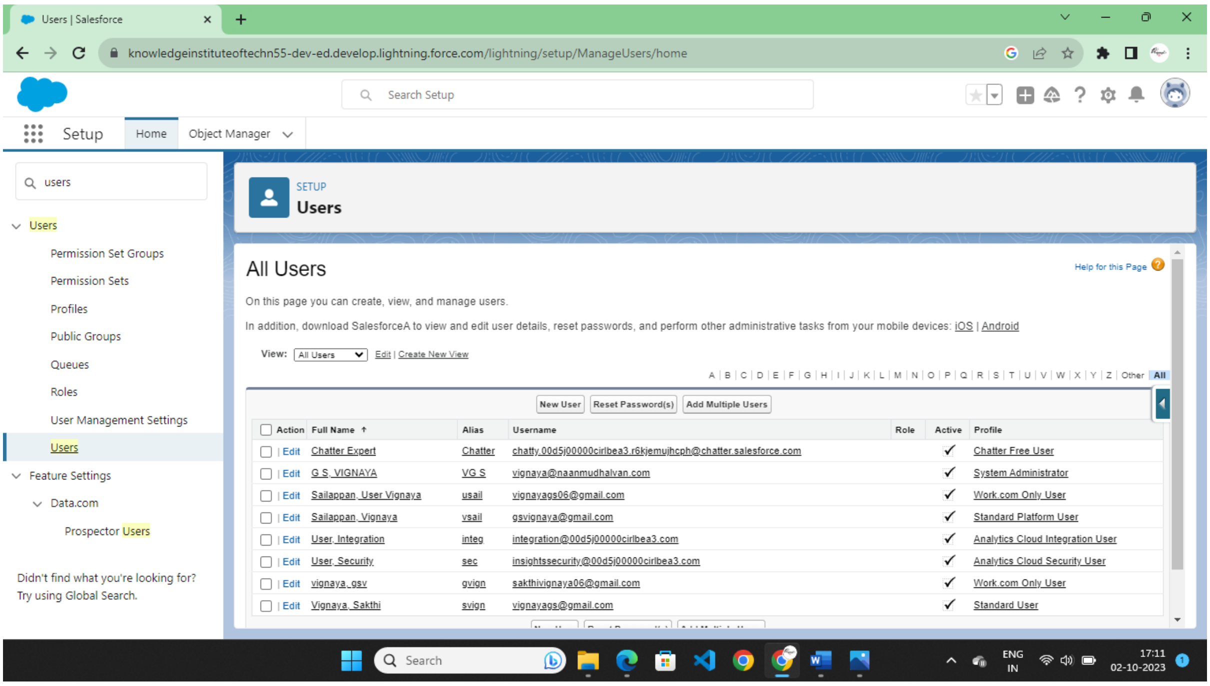
Verify User Creation:

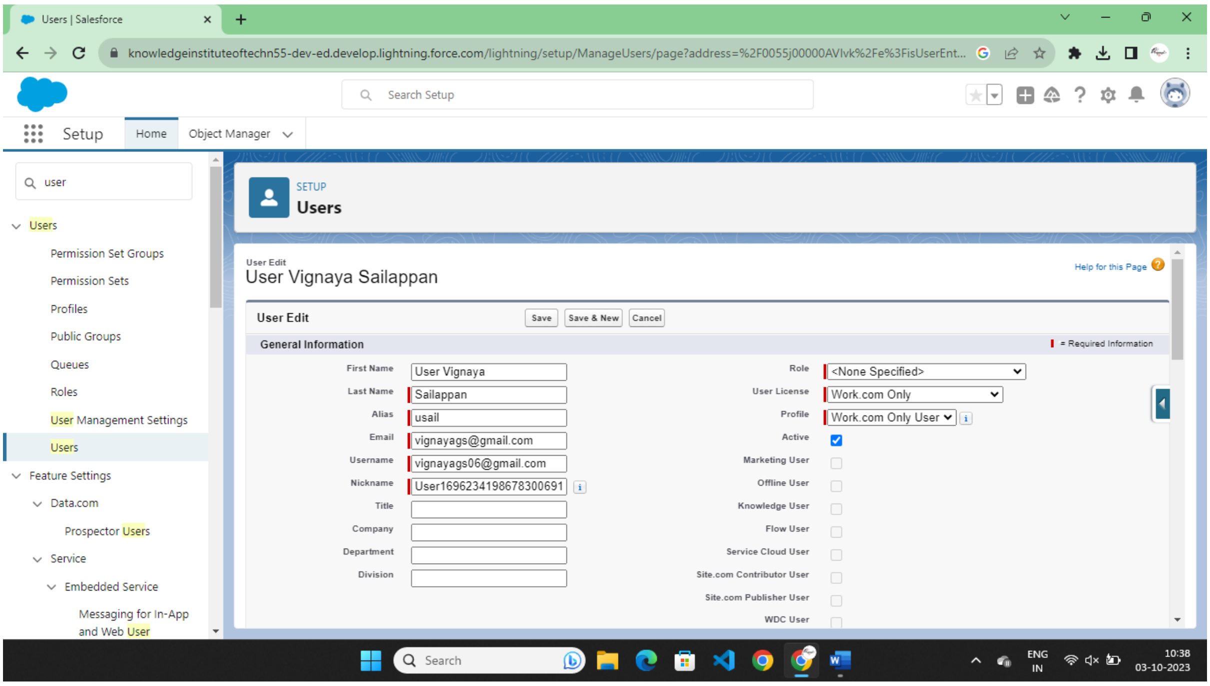
- Log out of your administrator account and log in as the newly created user to ensure they have the expected access and permissions.

Profile Creation:



User Creation:





You control record-level access in four ways. They're listed in order of increasing access. You use org-wide defaults to lock down your data to the most restrictive level, and then use the other record-level security tools to grant access to selected users, as required.

Org-wide defaults specify the default level of access users have to each other's records.

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.

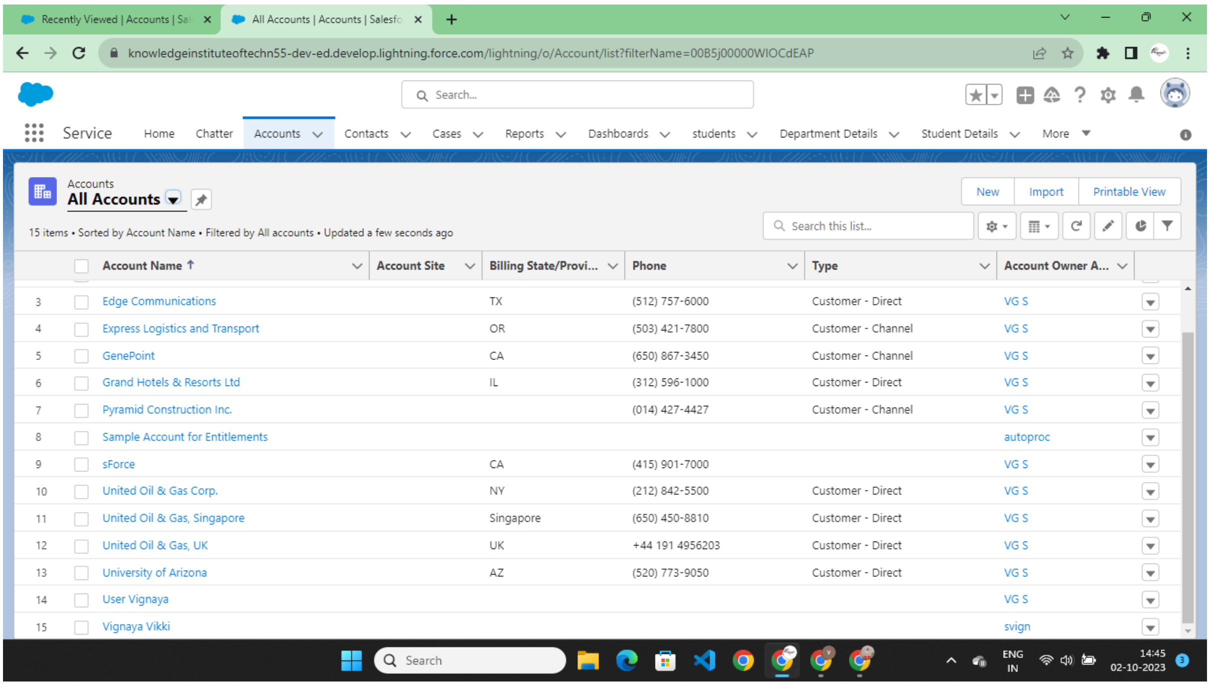
Sharing rules are automatic exceptions to org-wide defaults for particular groups of users, to give them access to records they don't own or can't normally see.

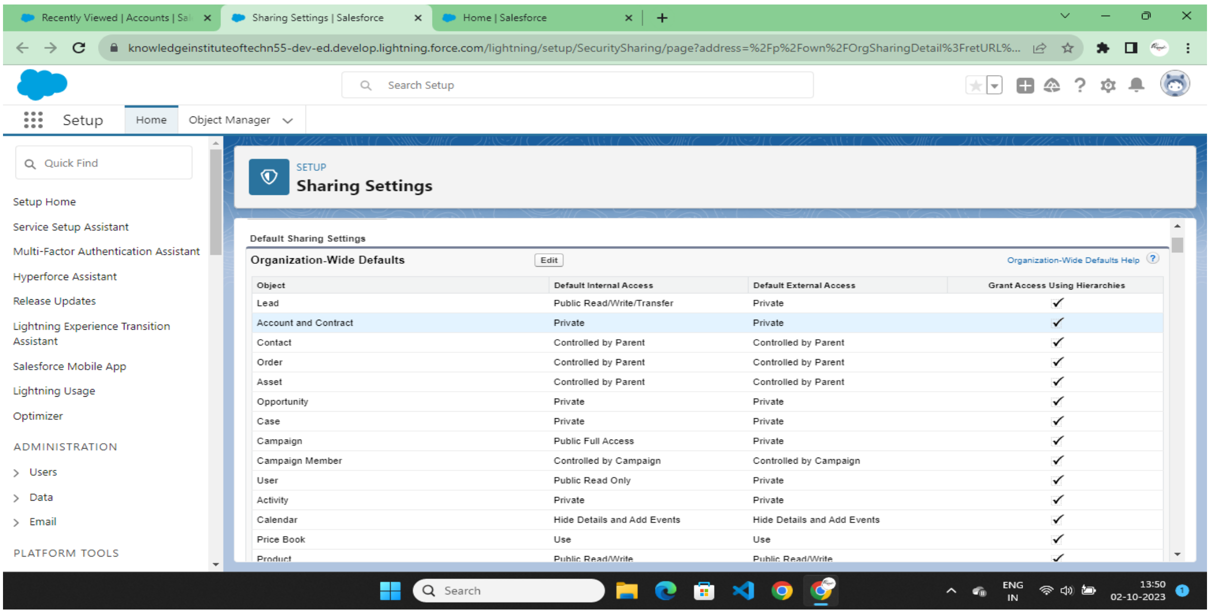
Manual sharing lets record owners give read and edit permissions to users who might not have access to the record any other way.

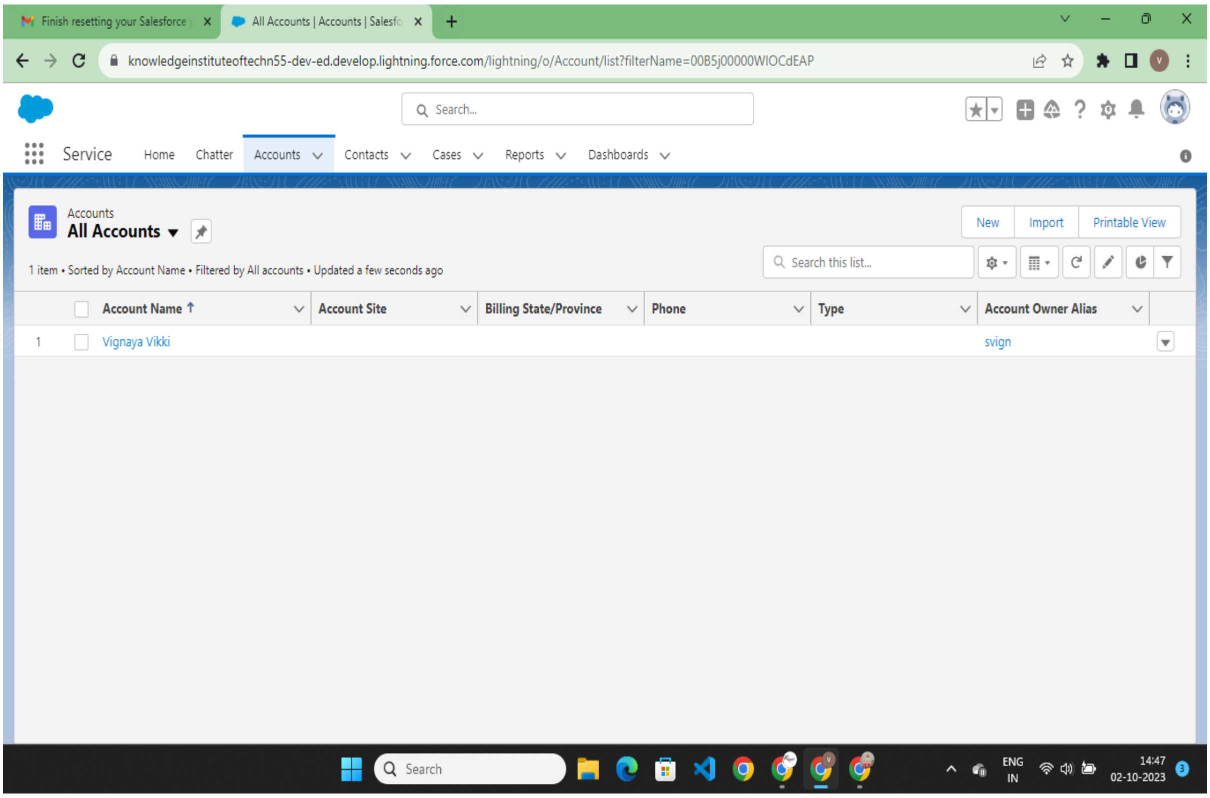
In admin:

Before giving the account as private it shows all the user accounts.

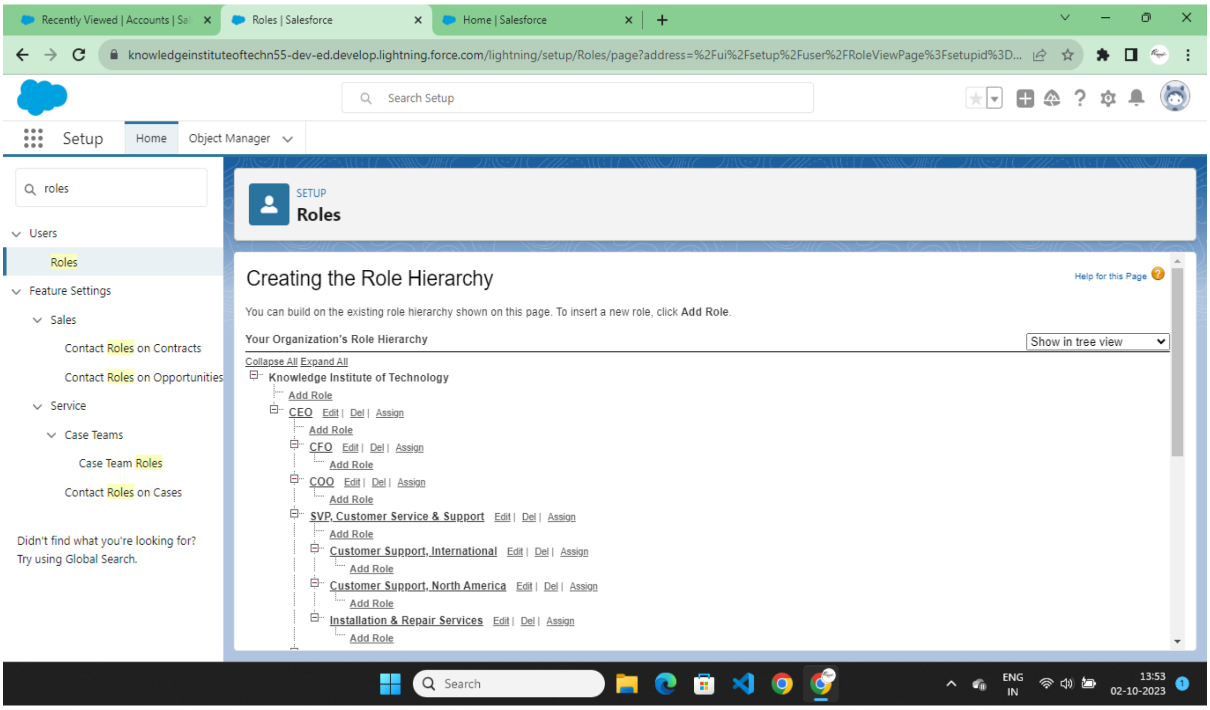
After giving the user account as private, one user cannot see the other user account.







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.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Roles | Salesforce
Home | Salesforce
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Feature Settings
Sales
Contact Roles on Contracts
Contact Roles on Opportunities
Service
Case Teams
Case Team Roles
Contact Roles on Cases
Didn't find what you're looking for? Try using Global Search.
SETUP
Roles
Creating the Role Hierarchy
Help for this Page
You can build on the existing role hierarchy shown on this page. To insert a new role, click Add Role.
Your Organization's Role Hierarchy
Show in tree view
Collapse All Expand All
Knowledge Institute of Technology
Add Role
CEO Edit | Del | Assign
Add Role
CFO Edit | Del | Assign
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COO Edit | Del | Assign
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SVP, Customer Service & Support Edit | Del | Assign
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Customer Support, International Edit | Del | Assign
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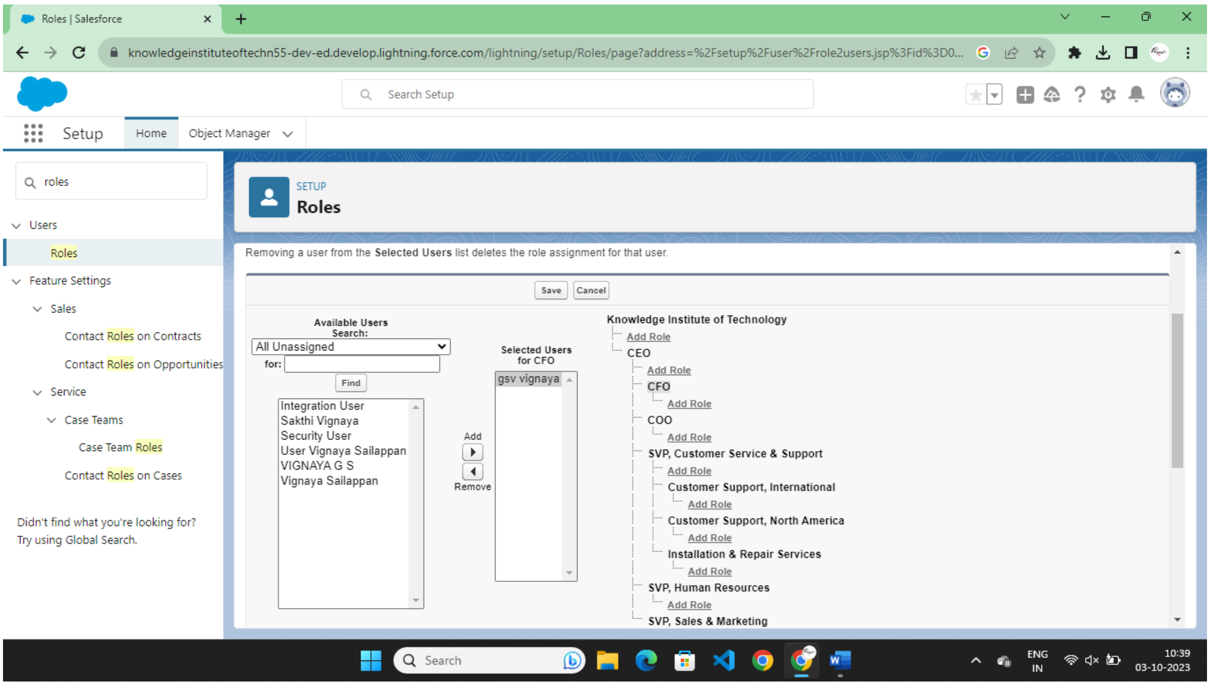
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Contact Roles on Opportunities
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Case Team Roles
Contact Roles on Cases
Didn't find what you're looking for? Try using Global Search.
SETUP
Roles
Removing a user from the Selected Users list deletes the role assignment for that user.
Save Cancel
Available Users
Search:
All Unassigned
for:
Find
Integration User
Sakthi Vignaya
Security User
User Vignaya Sailappan
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Add
Remove
Selected Users for CFO
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Knowledge Institute of Technology
Add Role
CEO
Add Role
CFO
Add Role
COO
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SVP, Customer Service & Support
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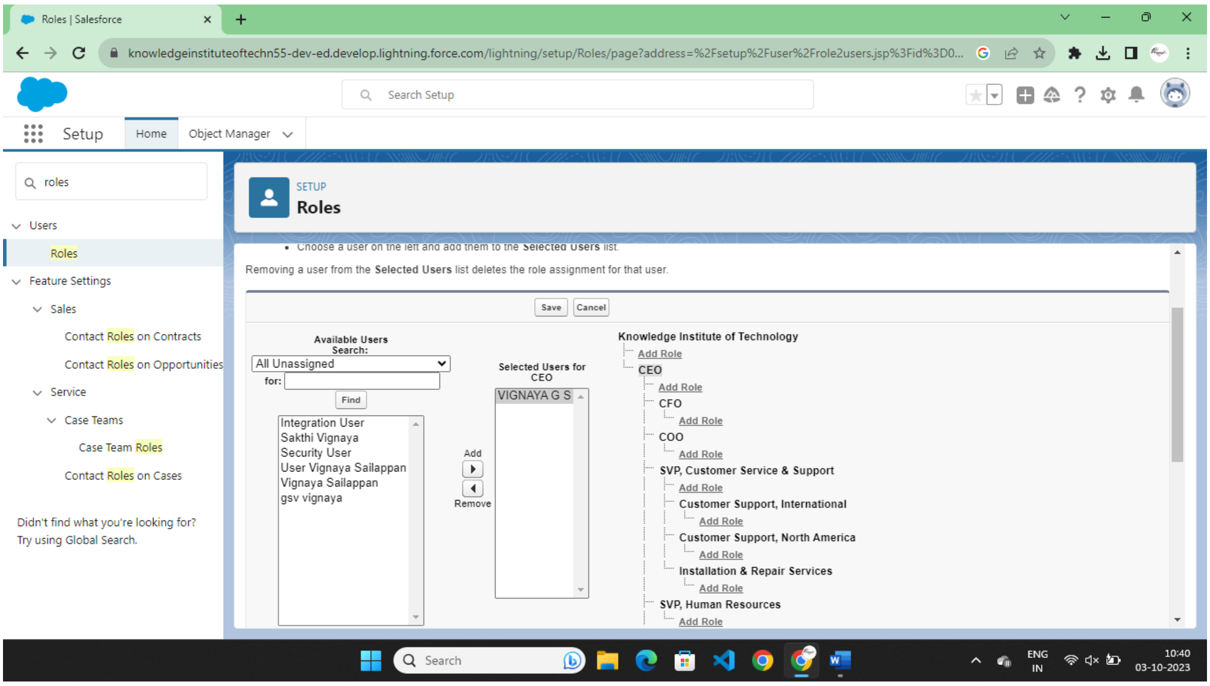


3. Suppose there are 2 Users and they are having Create, Read, Edit access on Account Object with the same profile but we want to open up the access for one user to delete how will you implement the Security setting.

If you have two users with the same profile in Salesforce and both have Create, Read, and Edit access to the Account object, but you want to grant one of them the ability to delete records while restricting the other, you can achieve this by using Permission Sets.

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.

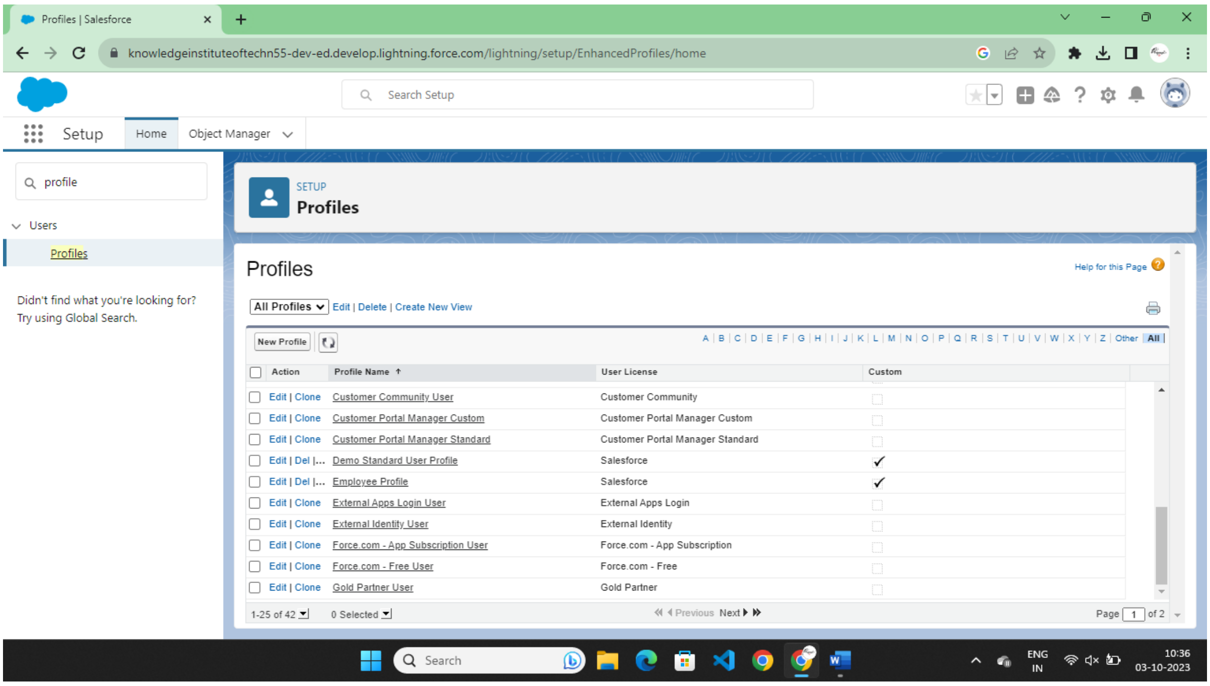
4.Remove Delete Access from Profile:

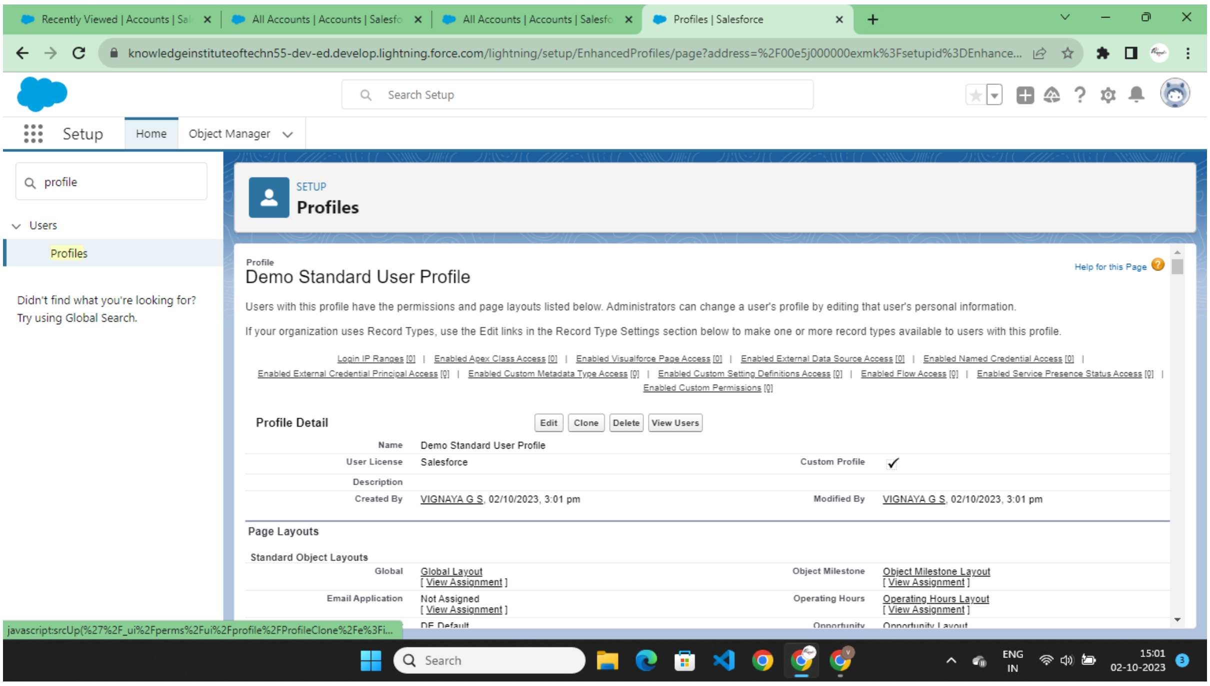
- Go to the profile assigned to both users.

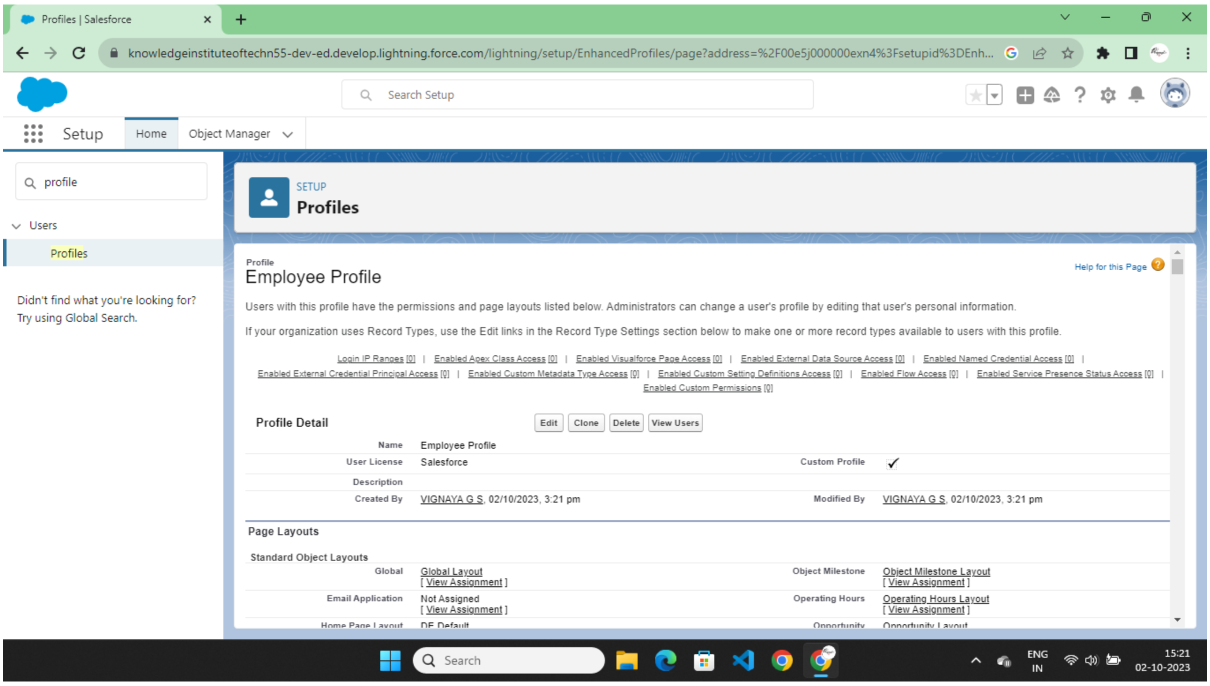
- In the profile settings, remove the "Delete" permission for the Account object.

Profile Creation:

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






Profiles | Salesforce
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Search Setup
Setup
Home
Object Manager
profile
Users
Profiles
Didn't find what you're looking for?
Try using Global Search.
SETUP
Profiles
Profile
Employee Profile
Help for this Page
Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.
If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.
Profile Detail
Edit
Clone
Delete
View Users
Name
Employee Profile
User License
Salesforce
Custom Profile
Description
Created By
VIGNAYA G S, 02/10/2023, 3:21 pm
Modified By
VIGNAYA G S, 02/10/2023, 3:21 pm
Page Layouts
Standard Object Layouts
Global
Global Layout
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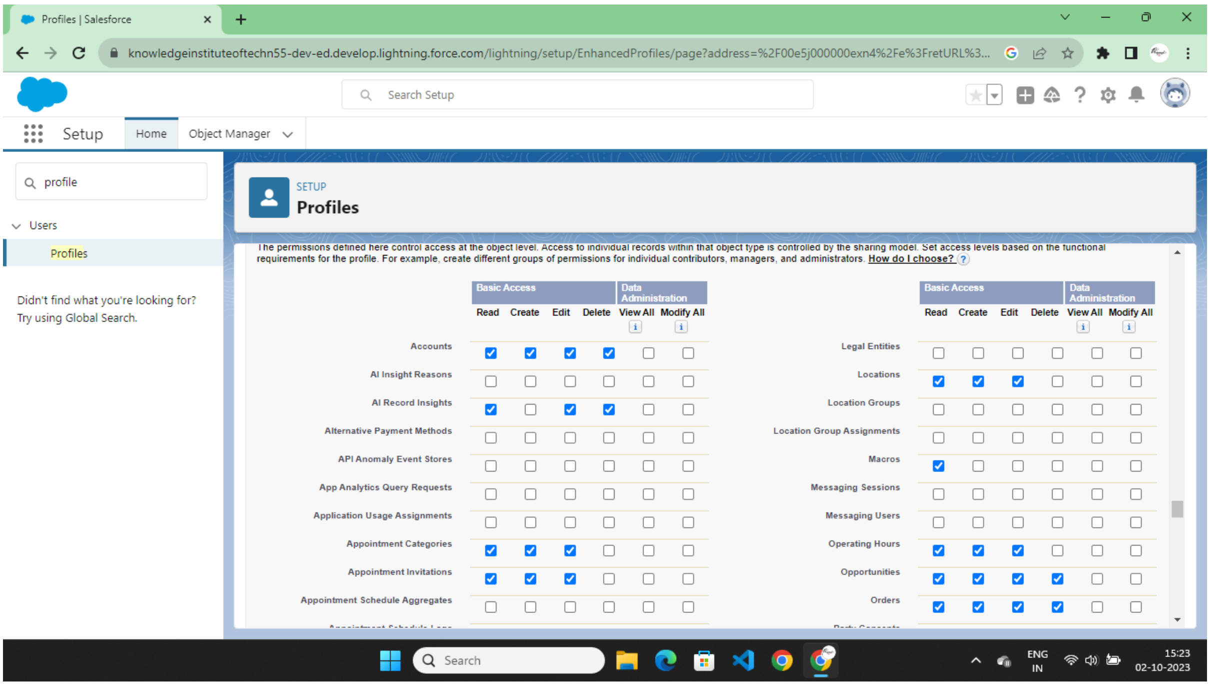
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Search Setup
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Profiles
Didn't find what you're looking for?
Try using Global Search.
SETUP
Profiles
How do I choose?
Basic Access
Data Administration
Read
Create
Edit
Delete
View All
Modify All
Accounts
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 Schedule Aggregates
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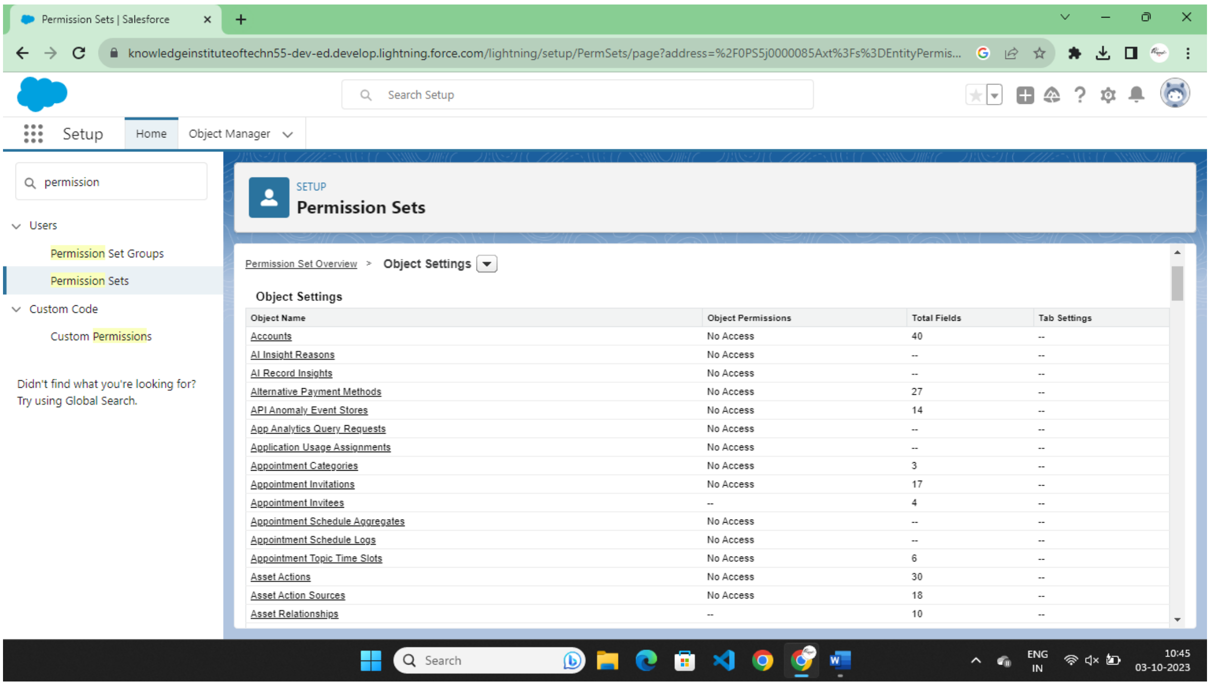
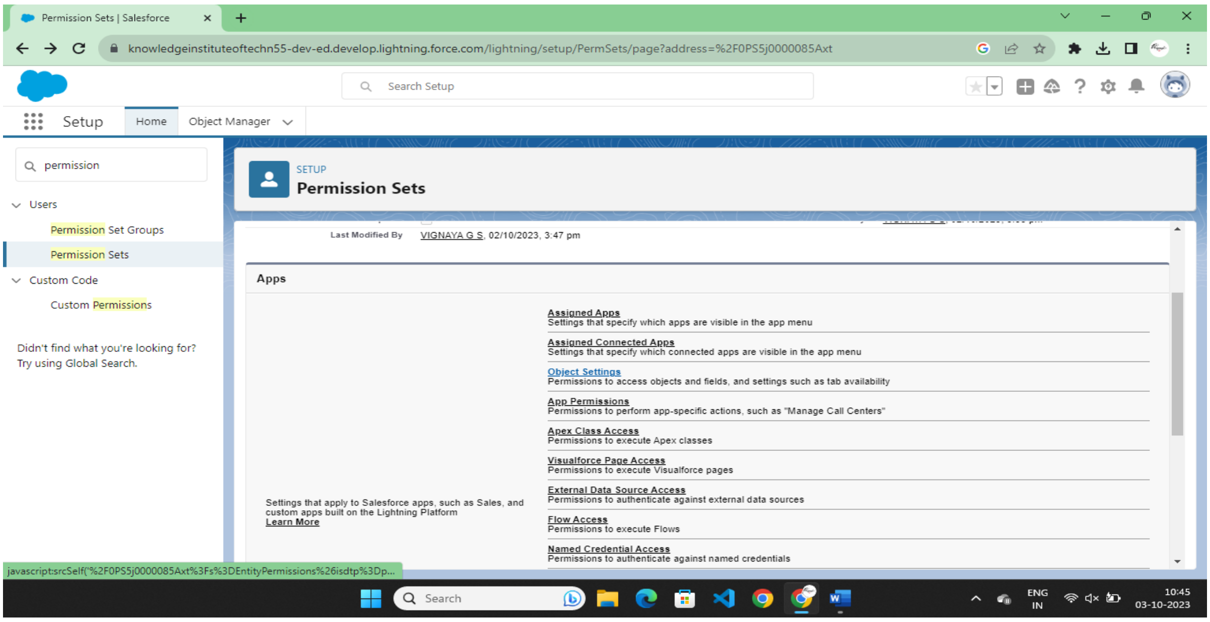
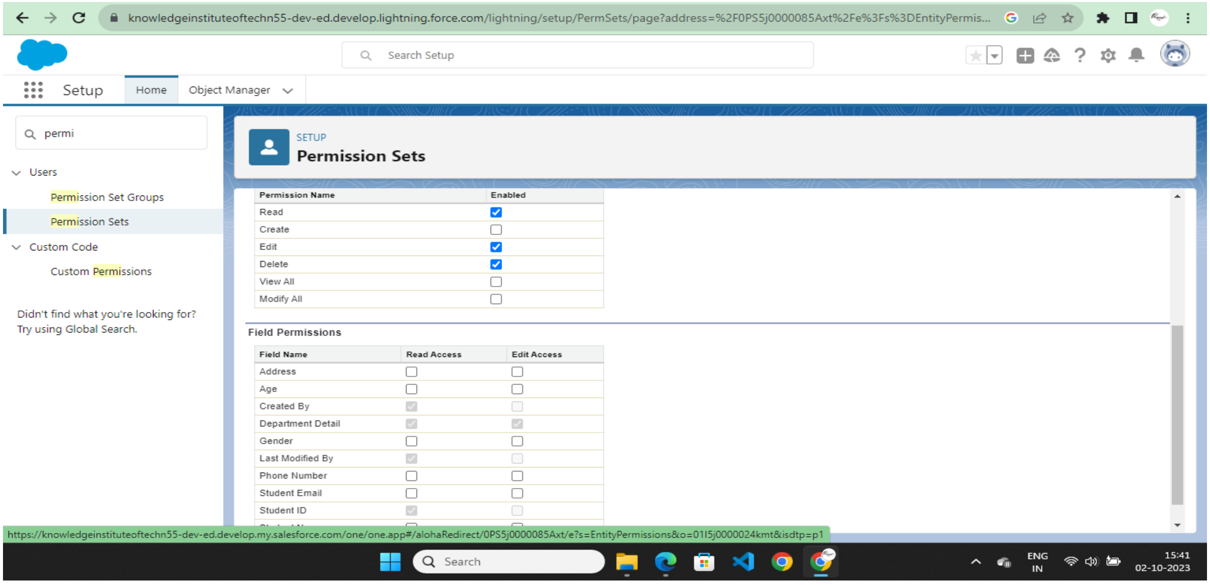
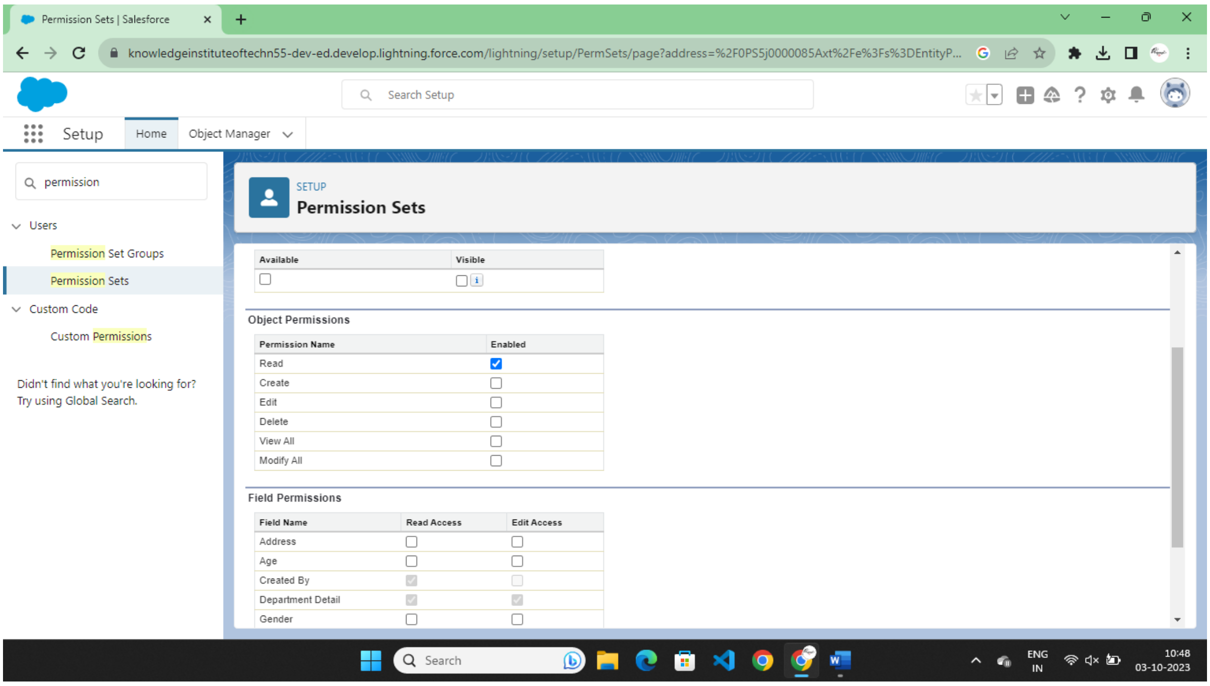
Permission Sets:









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

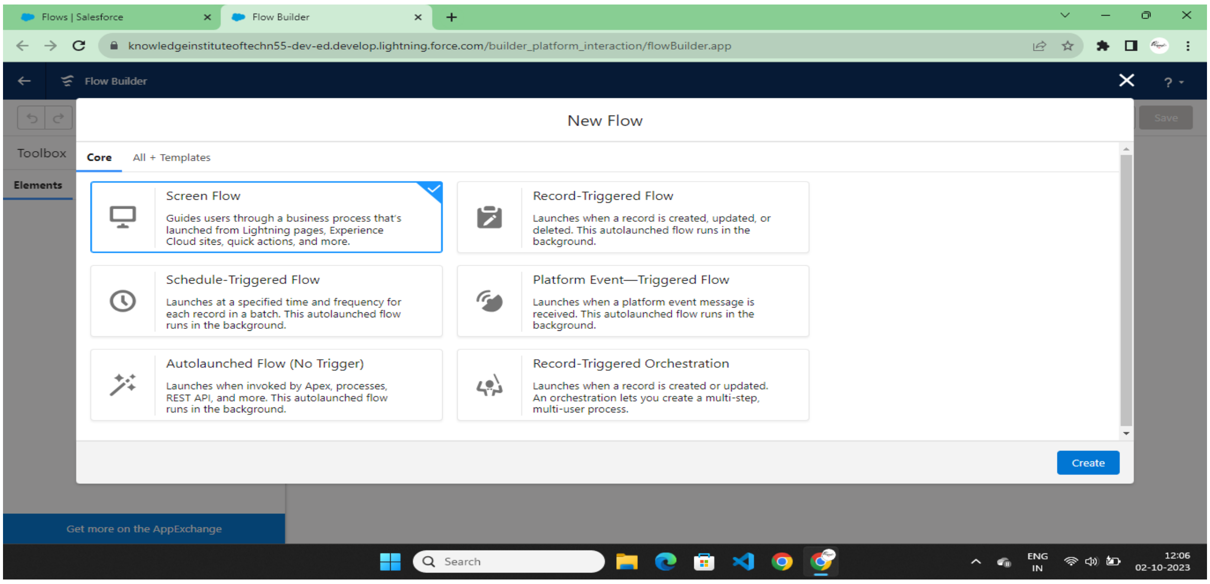
1. Log in to your Salesforce account.

2. Click on your profile picture or the gear icon in the upper-right corner.

3. Select "Setup" from the dropdown menu.

Step 2: Create a Flow

1. In the Setup menu, type "Flows" in the Quick Find box and select "Flows."



Step 3: Add Screen Elements

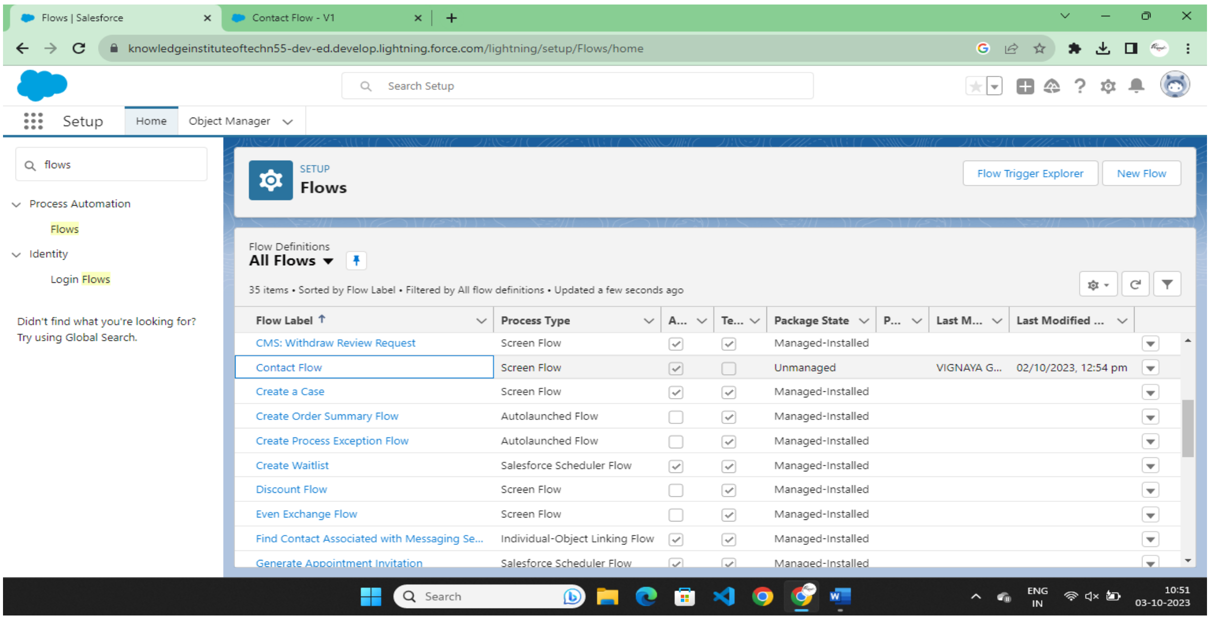
1. Drag and drop a "Screen" element onto the canvas. This will be the starting point of your flow.

2. Click on the screen element to configure it.

3. Add text and instructions on this screen to inform users about the survey and what information is required.

4. Drag and drop the appropriate input elements (e.g., text fields, radio buttons, checkboxes) onto the screen for users to input their survey details. You can find these elements in the palette on the left.

5. Configure each input element with the appropriate labels, help text, and validation rules if necessary.


Flows | Salesforce
Contact Flow - V1
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Search Setup
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Didn't find what you're looking for? Try using Global Search.
SETUP
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New Flow
Flow Definitions
All Flows
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Screen Flow
Managed-Installed
Contact Flow
Screen Flow
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Create a Case
Screen Flow
Managed-Installed
Create Order Summary Flow
Autolaunched Flow
Managed-Installed
Create Process Exception Flow
Autolaunched Flow
Managed-Installed
Create Waitlist
Salesforce Scheduler Flow
Managed-Installed
Discount Flow
Screen Flow
Managed-Installed
Even Exchange Flow
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Salesforce Scheduler Flow
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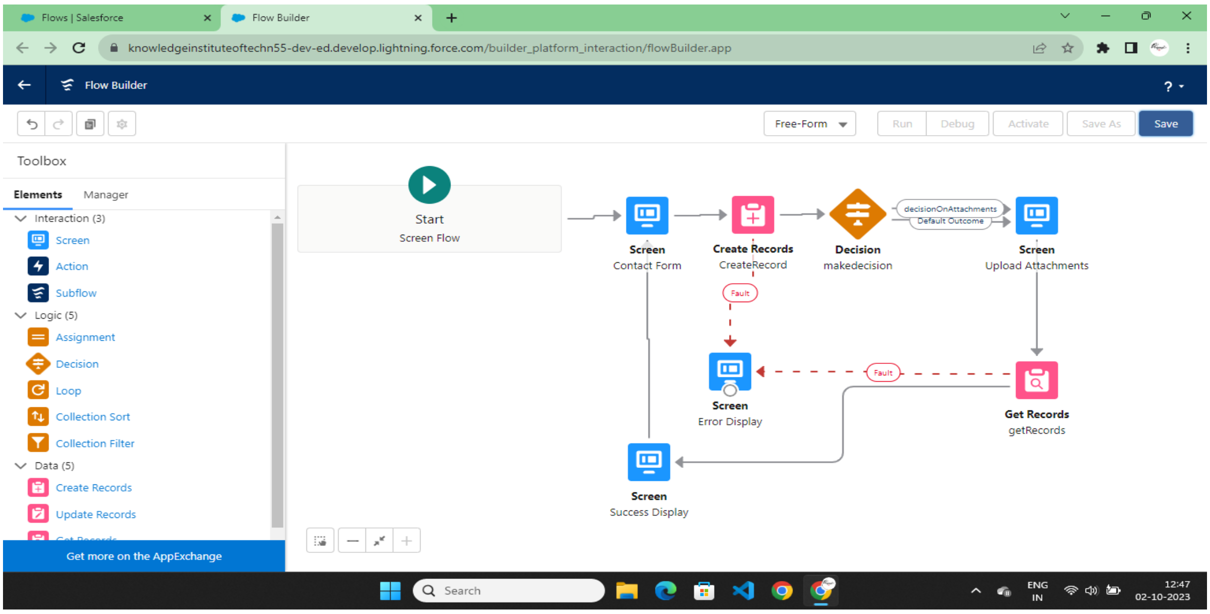
Flows | Salesforce
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Flow Builder
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Subflow
Logic (5)
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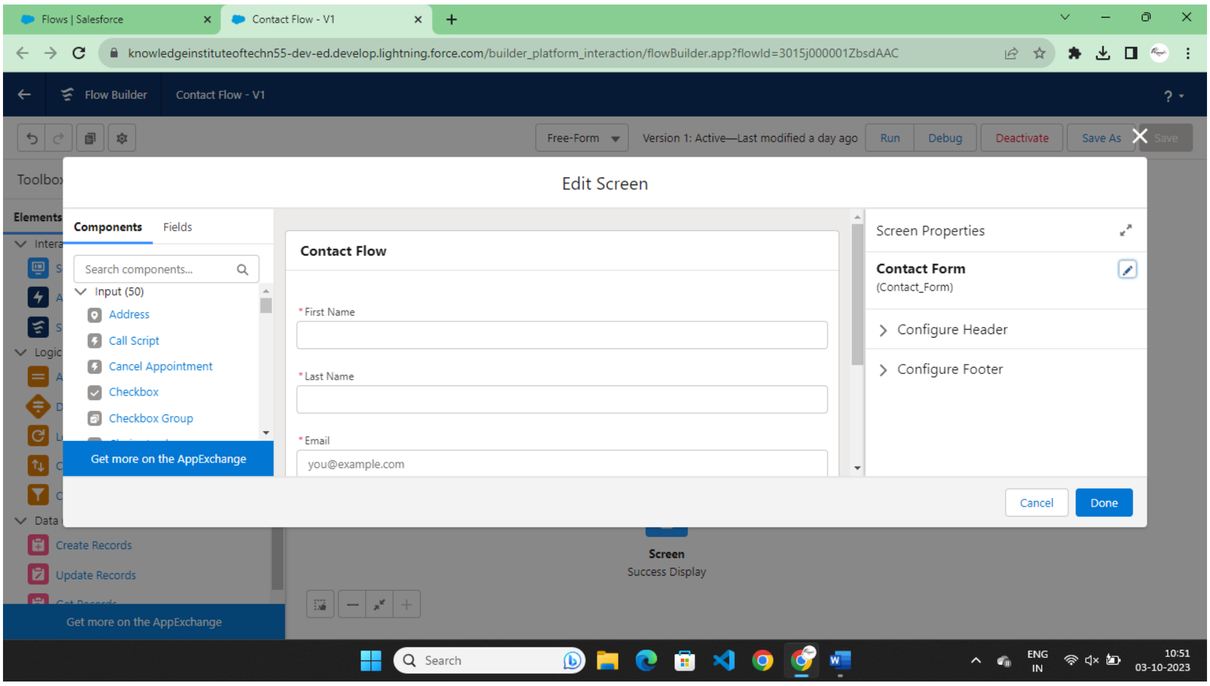
Flows | Salesforce
Contact Flow - V1
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Flow Builder
Contact Flow - V1
Free-Form
Version 1: Active—Last modified a day ago
Run
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Edit Screen
Components
Fields
Search components...
Input (50)
Address
Call Script
Cancel Appointment
Checkbox
Checkbox Group
Get more on the AppExchange
Contact Flow
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Last Name
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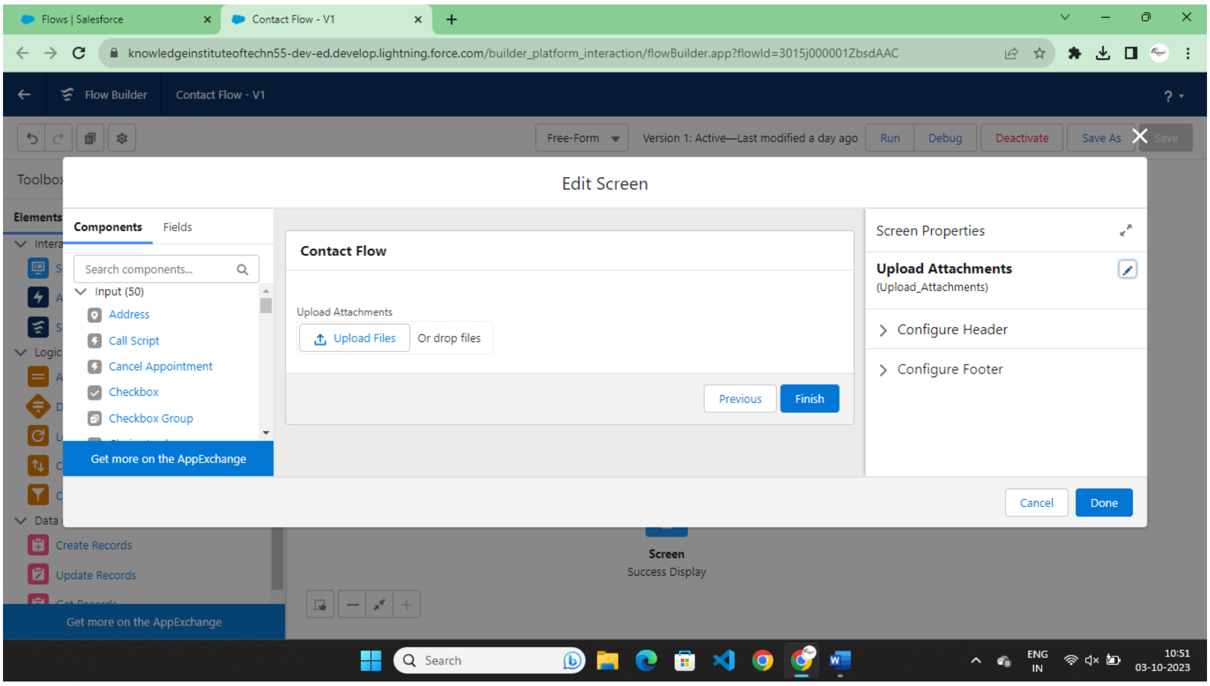
Flows | Salesforce
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Flow Builder
Contact Flow - V1
Free-Form
Version 1: Active—Last modified a day ago
Run
Debug
Deactivate
Save As
Save
Edit Screen
Components
Fields
Search components...
Input (50)
Address
Call Script
Cancel Appointment
Checkbox
Checkbox Group
Get more on the AppExchange
Contact Flow
Upload Attachments
Upload Files
Or drop files
Previous
Finish
Screen Properties
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Configure Header
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Cancel
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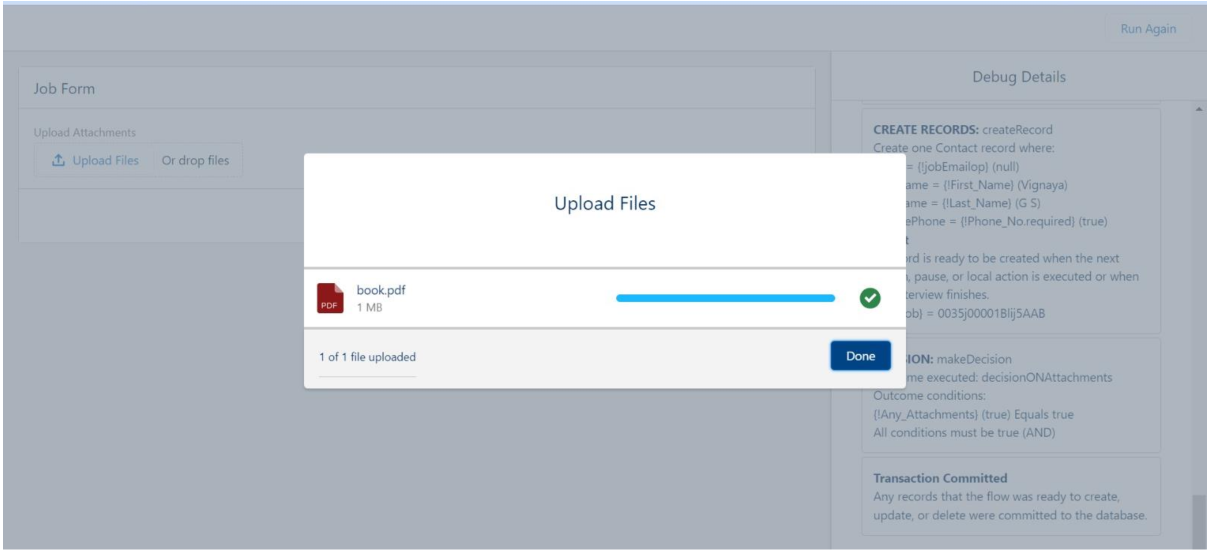
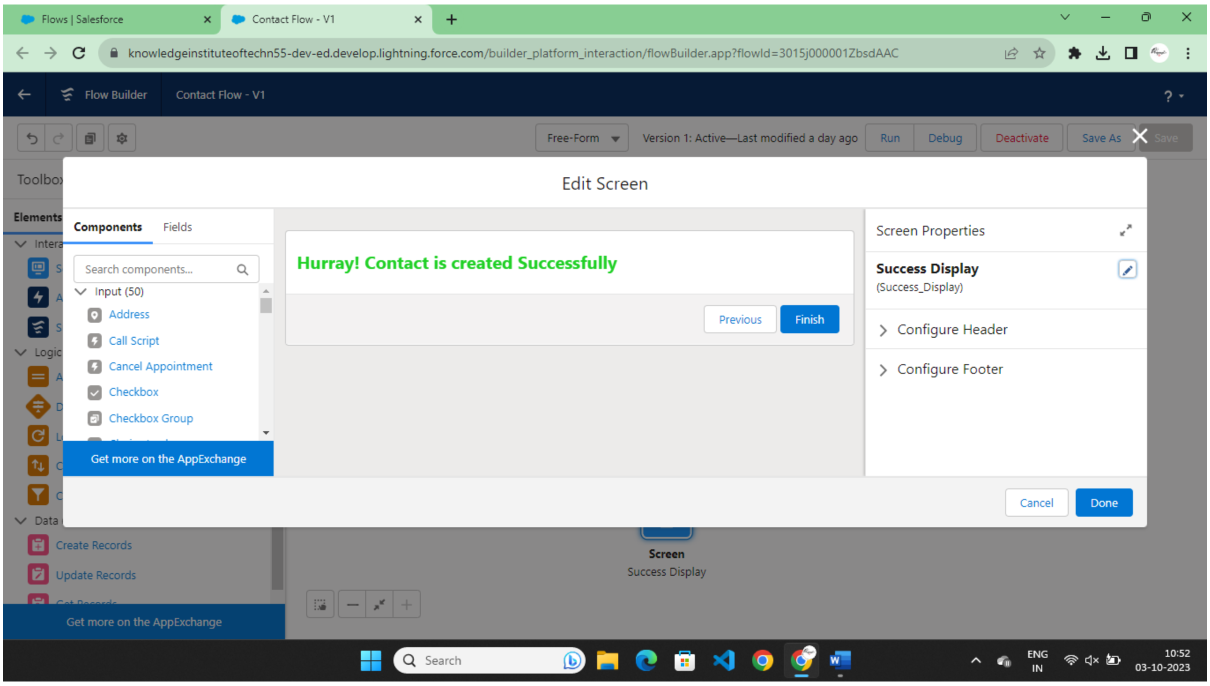
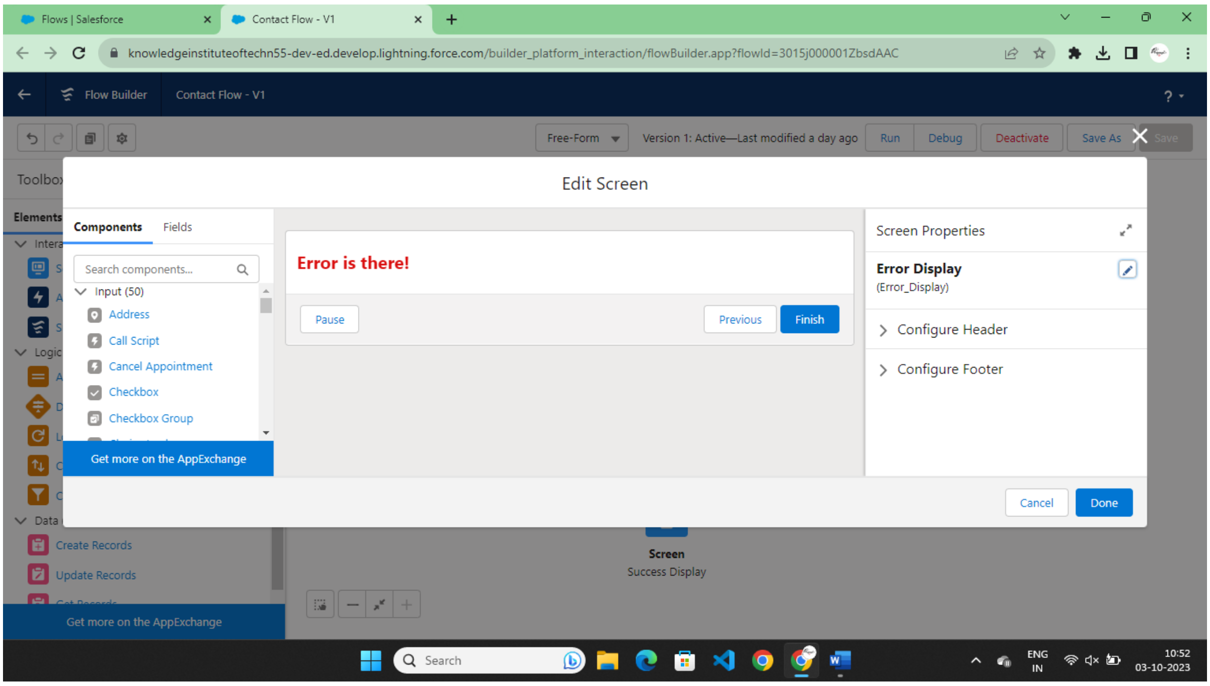
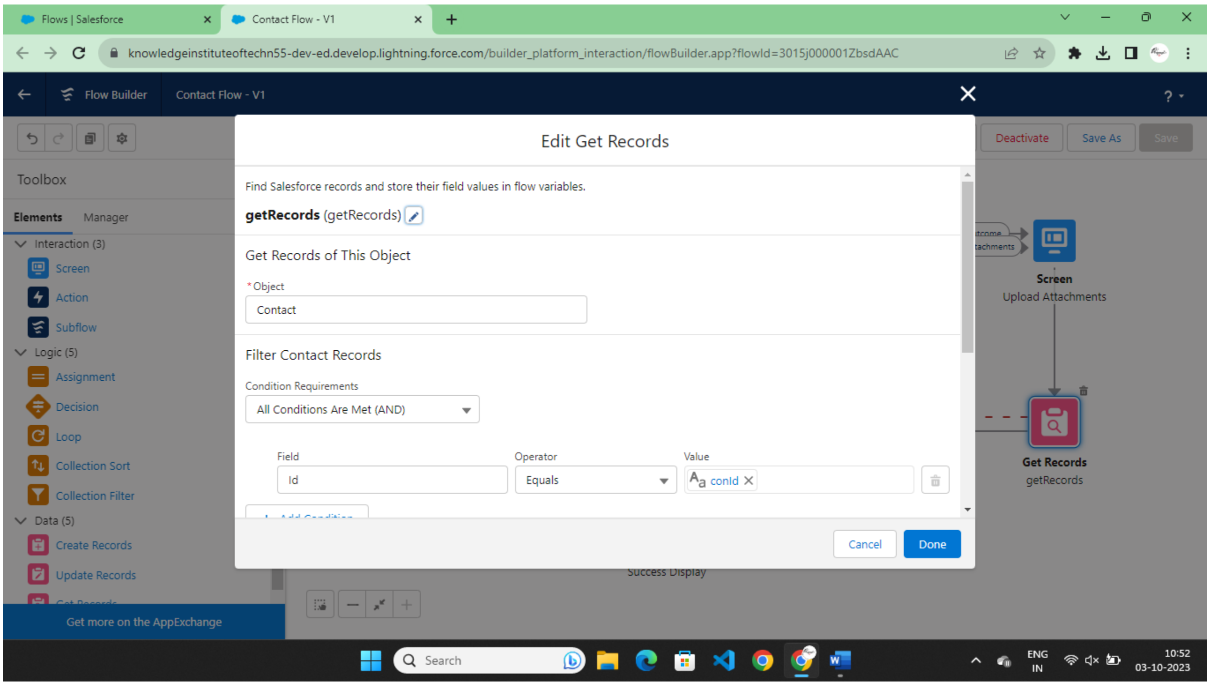
10:51
03-10-2023


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

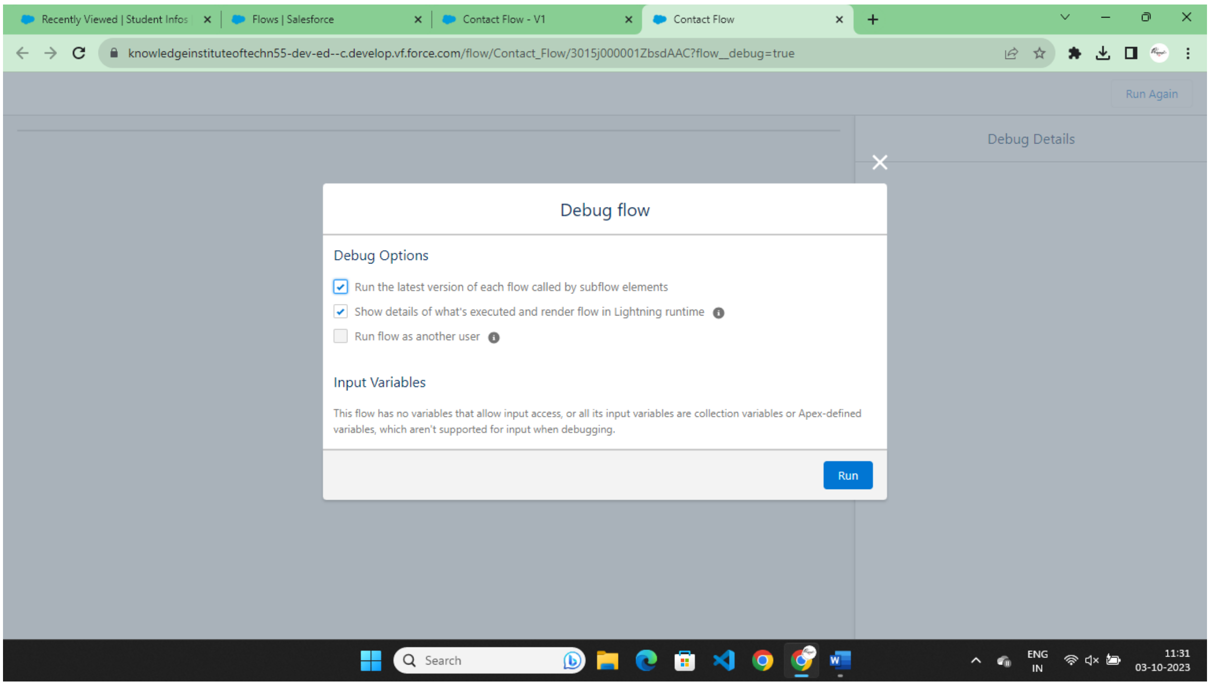

Flows | Salesforce
Contact Flow - V1
knowledgeinstituteoftechn55-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.app?flowId=3015j000001ZbsdAAC
Flow Builder
Contact Flow - V1
Free-Form
Version 1: Active—Last modified a day ago
Run
Debug
Deactivate
Save As
Save
Edit Screen
Components
Fields
Search components...
Input (50)
Address
Call Script
Cancel Appointment
Checkbox
Checkbox Group
Get more on the AppExchange
Hurray! Contact is created Successfully
Previous
Finish
Screen Properties
Success Display
(Success_Display)
Configure Header
Configure Footer
Cancel
Done
Create Records
Update Records
Screen
Success Display
Search
ENG
IN
10:52
03-10-2023

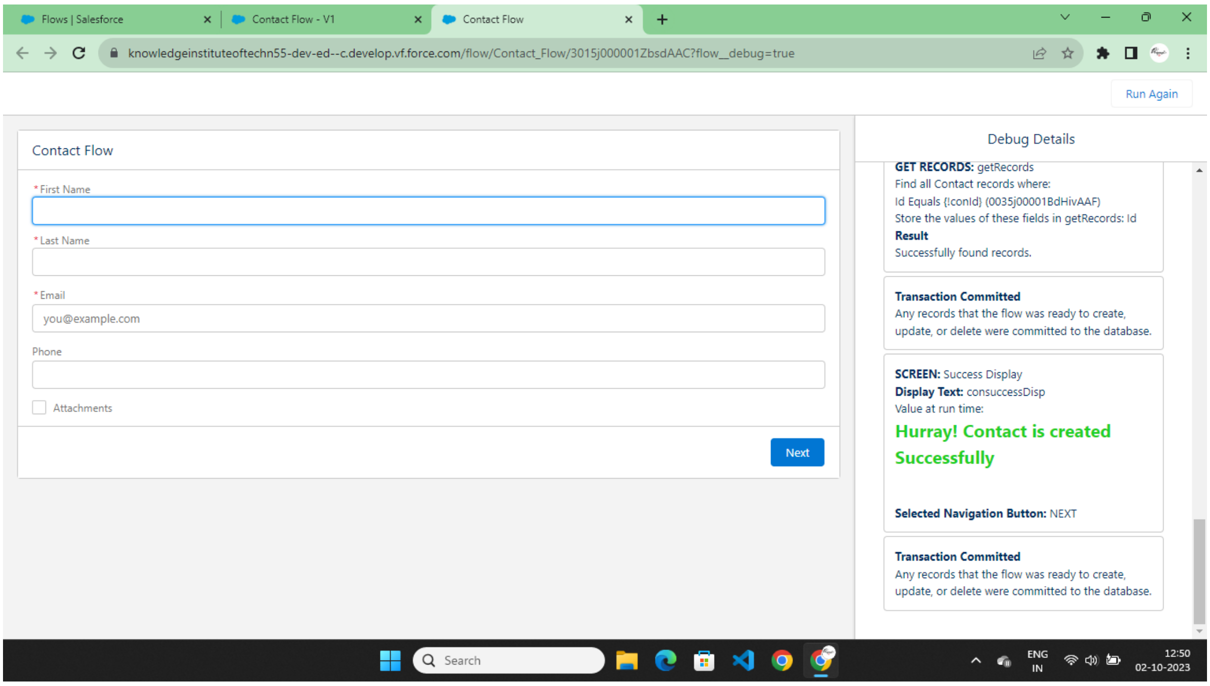


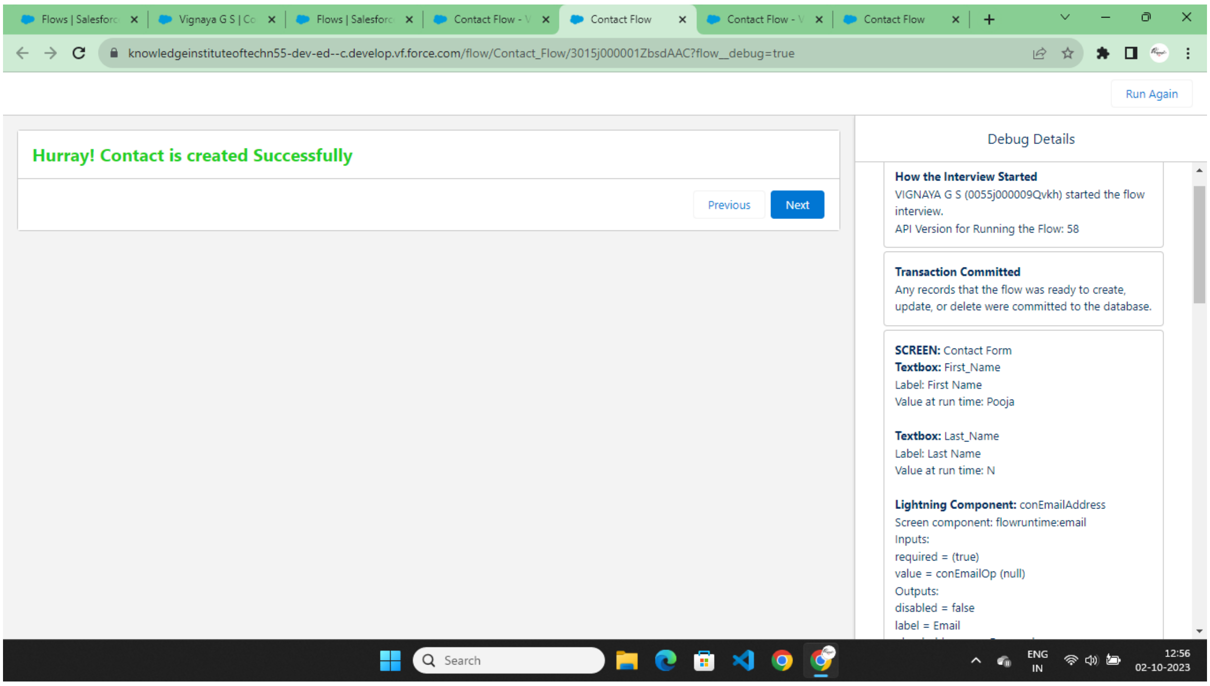


Step 4: Create Variables

1. If you want to capture and store the survey data, you need to create variables to hold the data. To do this, click on the "Manager" tab in the palette and create variables for each field on the screen. Make sure the variable types match the data types of the corresponding fields.


Recently Viewed | Student Infos
Flows | Salesforce
Contact Flow - V1
Contact Flow
knowledgeinstituteoftechn55-dev-ed--c.develop.vf.force.com/flow/Contact_Flow/3015j000001ZbsdAAC?flow__debug=true
Run Again
Debug Details
Debug flow
Debug Options
Run the latest version of each flow called by subflow elements
Show details of what's executed and render flow in Lightning runtime
Run flow as another user
Input Variables
This flow has no variables that allow input access, or all its input variables are collection variables or Apex-defined variables, which aren't supported for input when debugging.
Run
Search
ENG
IN
11:31
03-10-2023


Flows | Salesforce
Contact Flow - V1
Contact Flow
knowledgeinstituteoftechn55-dev-ed--c.develop.vf.force.com/flow/Contact_Flow/3015j000001ZbsdAAC?flow__debug=true
Run Again
Contact Flow
* First Name
* Last Name
* Email
you@example.com
Phone
Attachments
Next
Debug Details
GET RECORDS: getRecords
Find all Contact records where:
Id Equals {!conId} (0035j00001BdHivAAF)
Store the values of these fields in getRecords: Id
Result
Successfully found records.
Transaction Committed
Any records that the flow was ready to create, update, or delete were committed to the database.
SCREEN: Success Display
Display Text: consuccessDisp
Value at run time:
Hurray! Contact is created Successfully
Selected Navigation Button: NEXT
Transaction Committed
Any records that the flow was ready to create, update, or delete were committed to the database.
Search
ENG
IN
12:50
02-10-2023



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.