(NAAN MUDHALVAN)

NM2023TMID01395 - KIOT

SALESFORCE DEVELOPER

ASSIGNMENT - 1

NAME : PAVISH S

NM ID : AU611220205023

BRANCH : B.TECH IT – IV YEAR

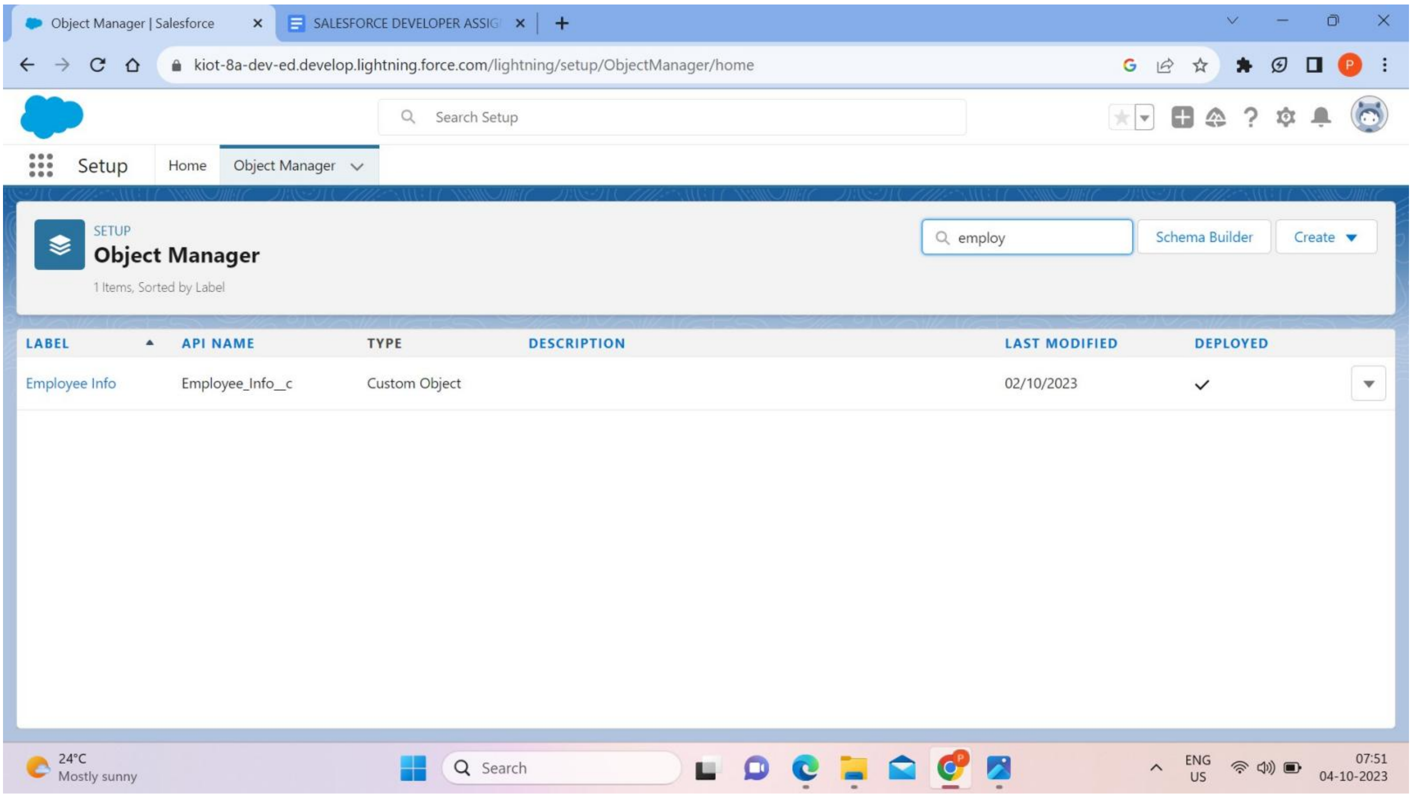
ZONE NO : ZONE - 8

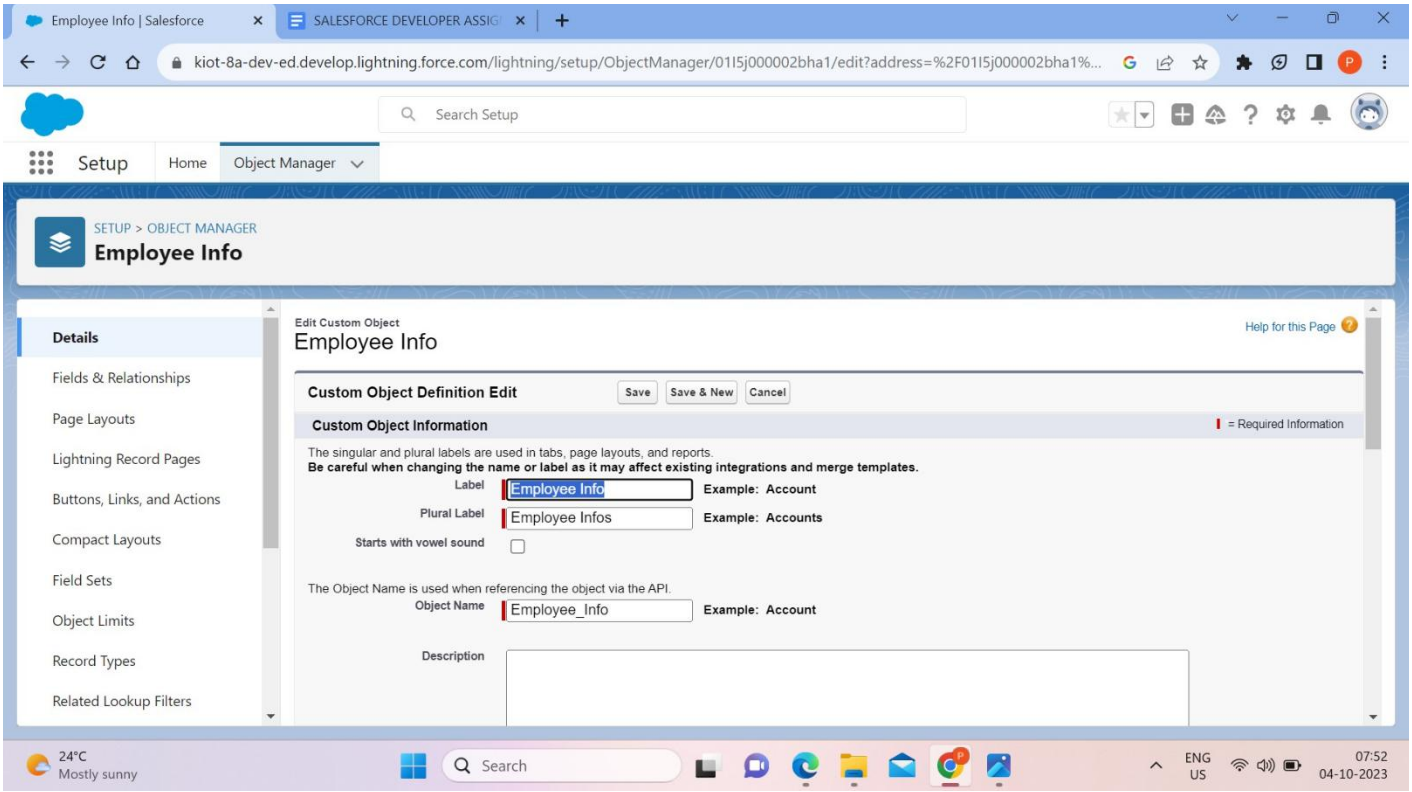
1.Create a Master-Detail Relationship between two Custom objects and also create a Roll Up Summary Field to Calculate total number of records.

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.

1.Create Custom Objects:

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




Employee Info | Salesforce
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Employee Info
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Edit Custom Object
Employee Info
Help for this Page
Custom Object Definition Edit
Save
Save & New
Cancel
Custom Object Information
= Required Information
The singular and plural labels are used in tabs, page layouts, and reports.
Be careful when changing the name or label as it may affect existing integrations and merge templates.
Label
Employee Info
Example: Account
Plural Label
Employee Infos
Example: Accounts
Starts with vowel sound
The Object Name is used when referencing the object via the API.
Object Name
Employee_Info
Example: Account
Description
24°C
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Search
ENG
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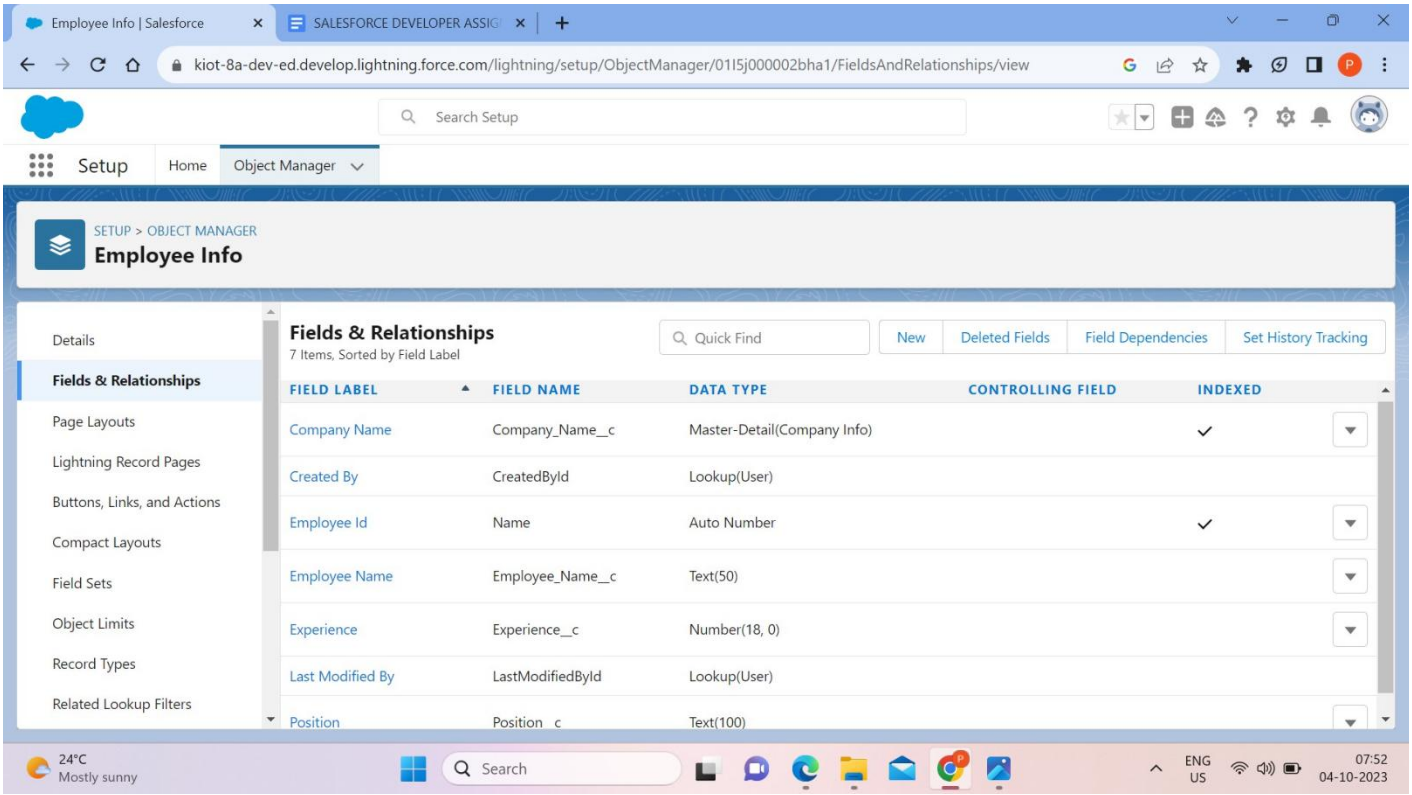
07:52
04-10-2023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Object Limits
Record Types
Related Lookup Filters
Fields & Relationships
7 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIELD
INDEXED
Company Name
Company_Name__c
Master-Detail(Company Info)
Created By
CreatedById
Lookup(User)
Employee Id
Name
Auto Number
Employee Name
Employee_Name__c
Text(50)
Experience
Experience__c
Number(18, 0)
Last Modified By
LastModifiedById
Lookup(User)
Position
Position__c
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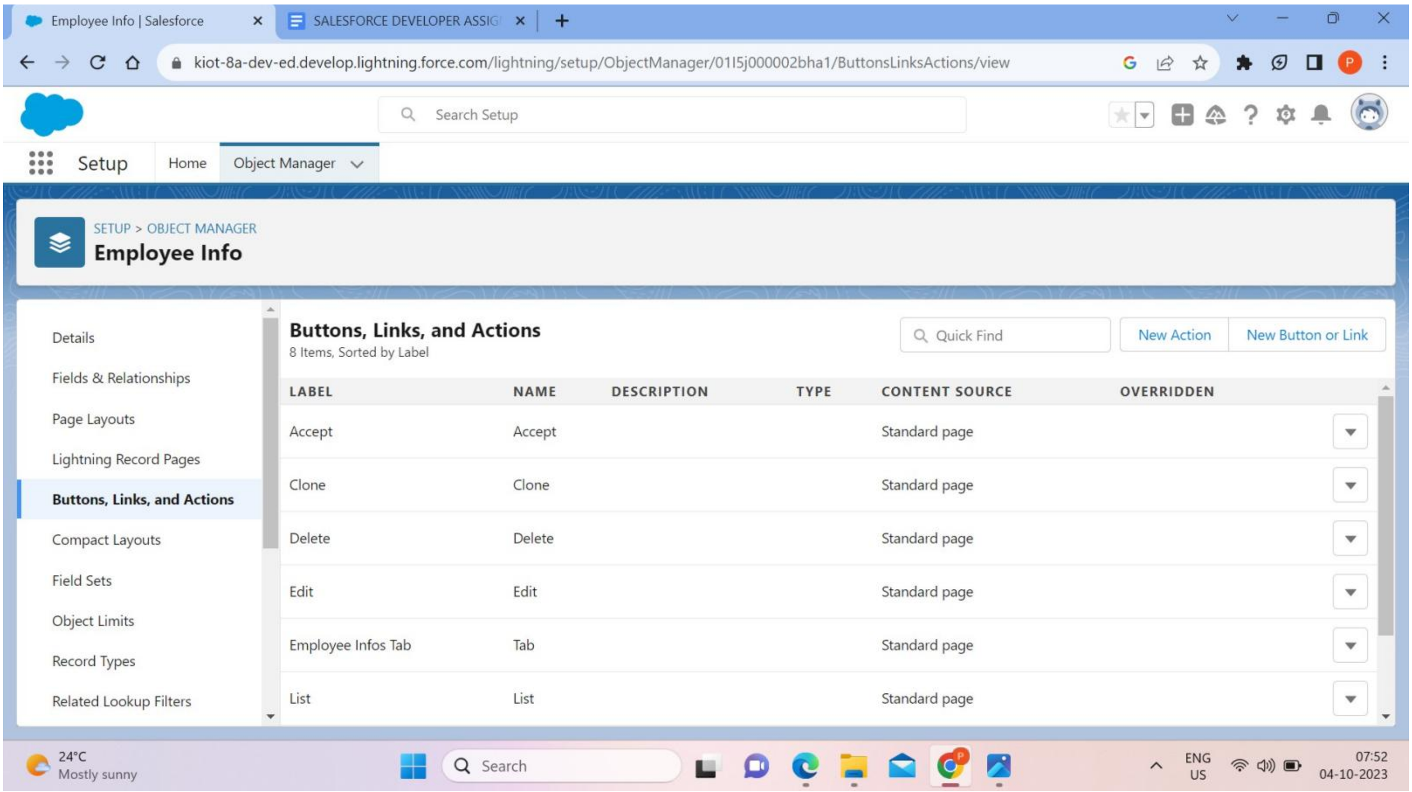
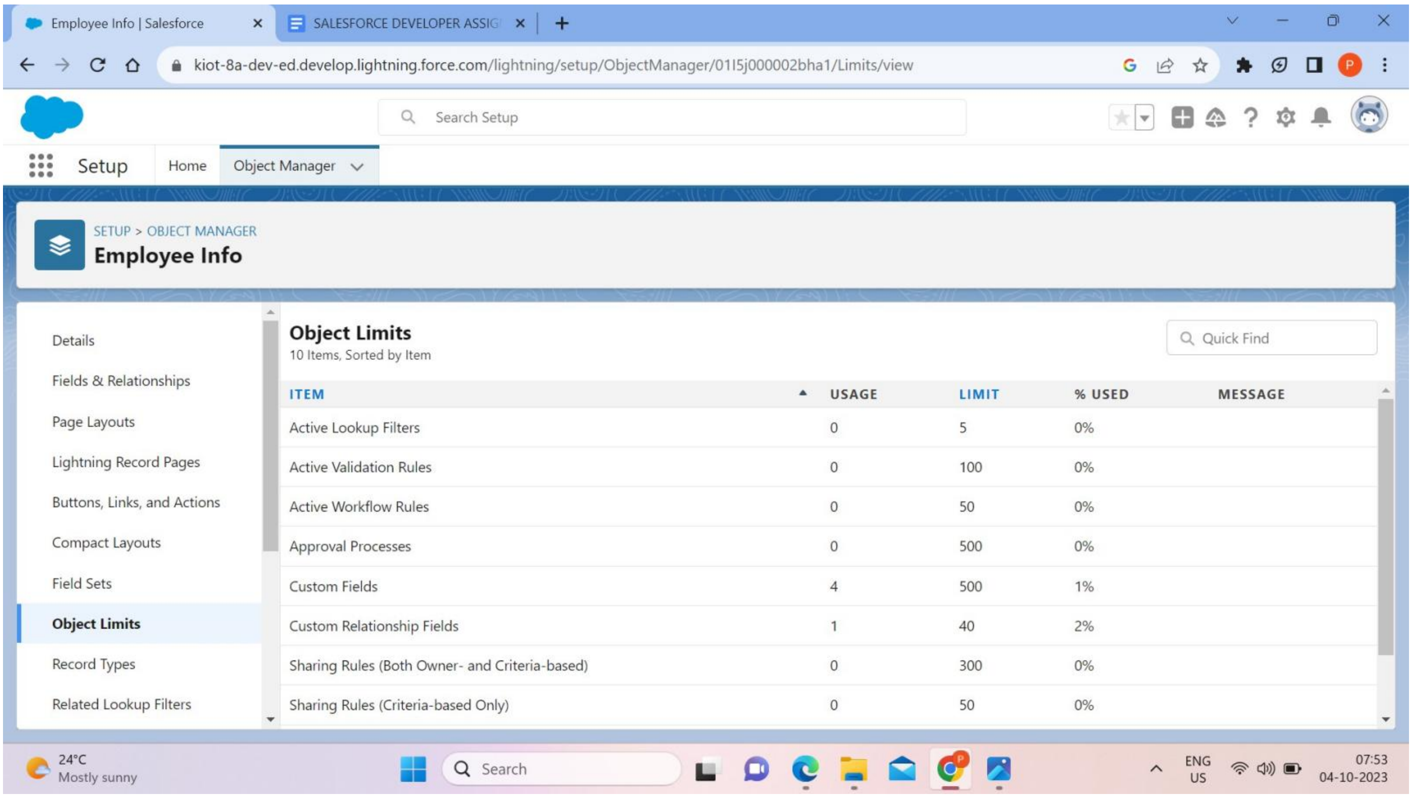
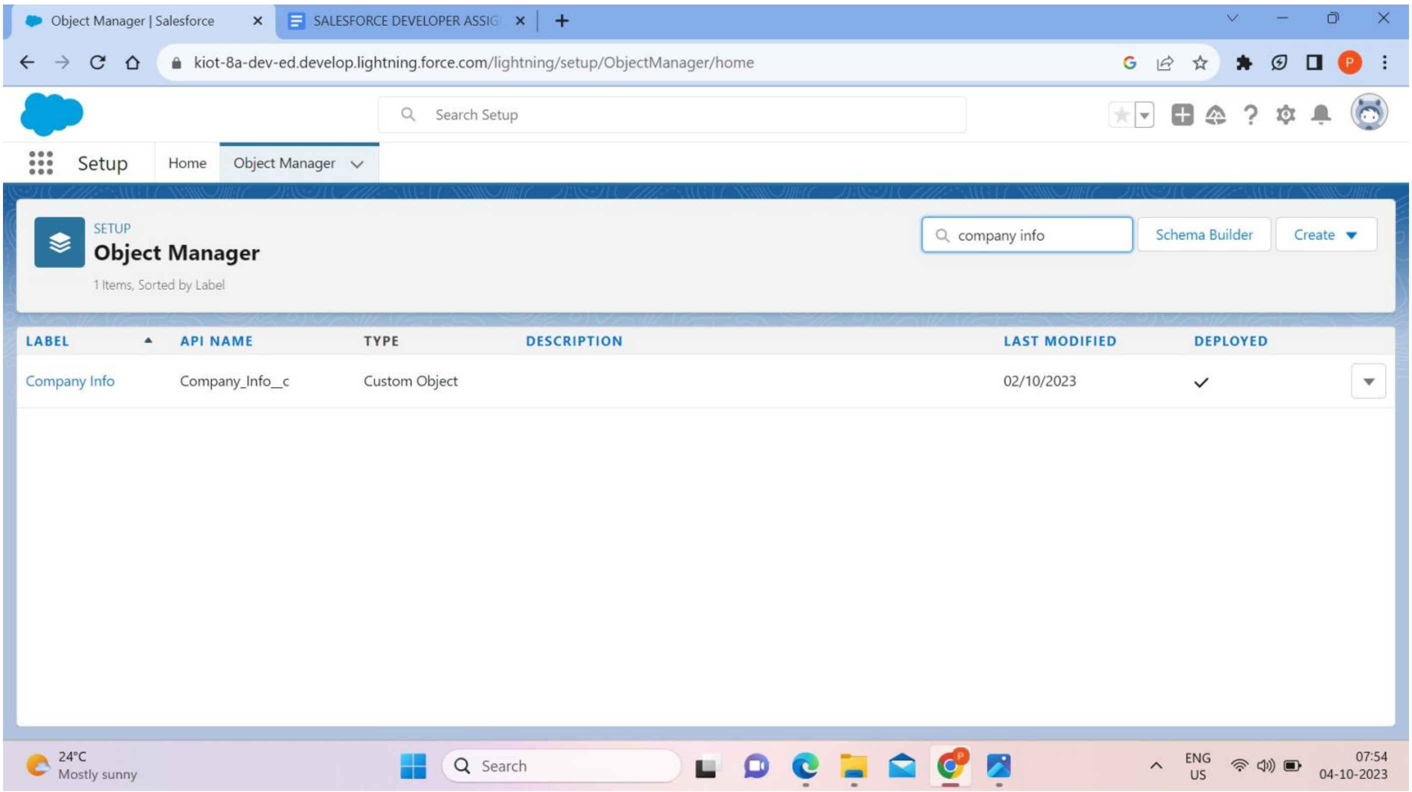




- Create the "Child_Object__c" custom object if you haven't already.


Object Manager | Salesforce
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1 Items, Sorted by Label
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Schema Builder
Create
LABEL
API NAME
TYPE
DESCRIPTION
LAST MODIFIED
DEPLOYED
Company Info
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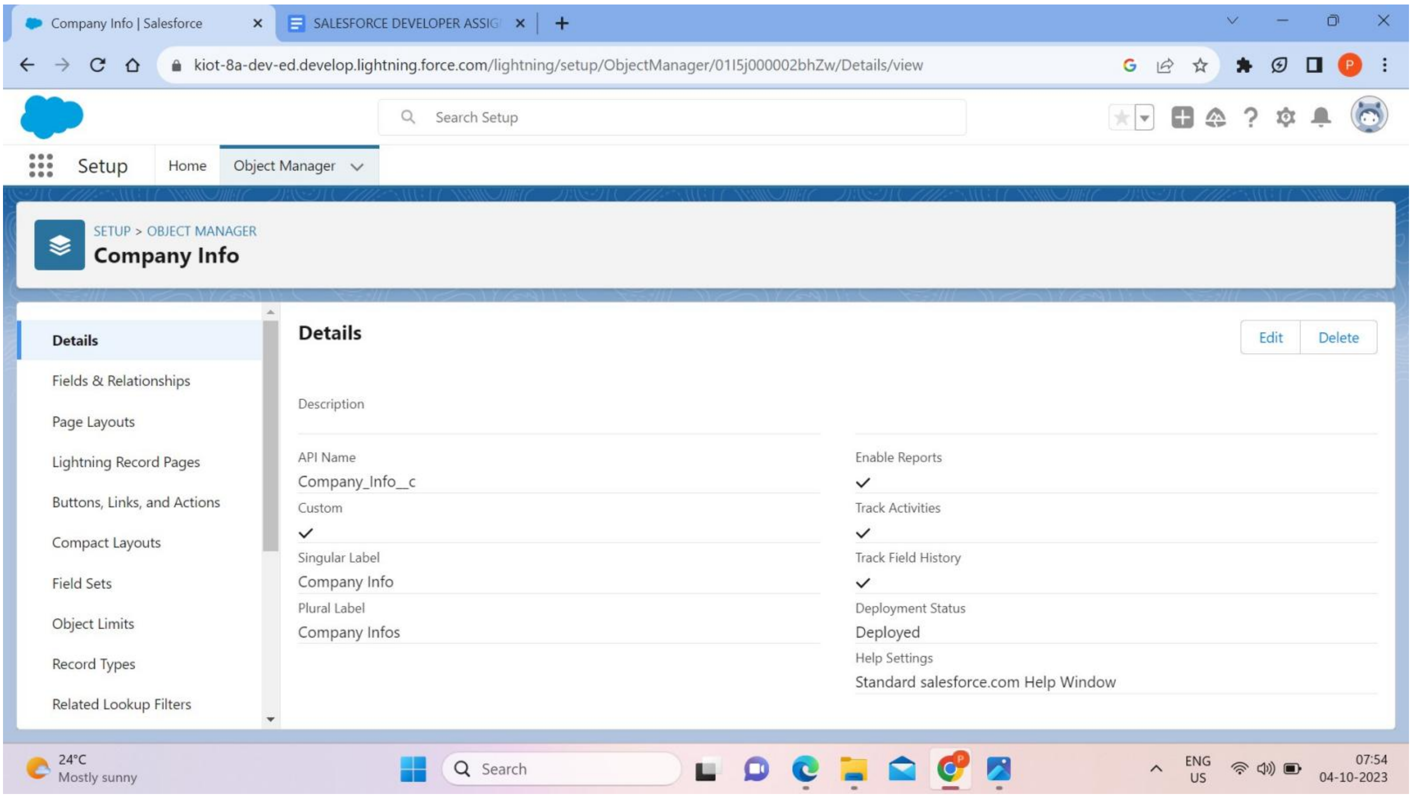
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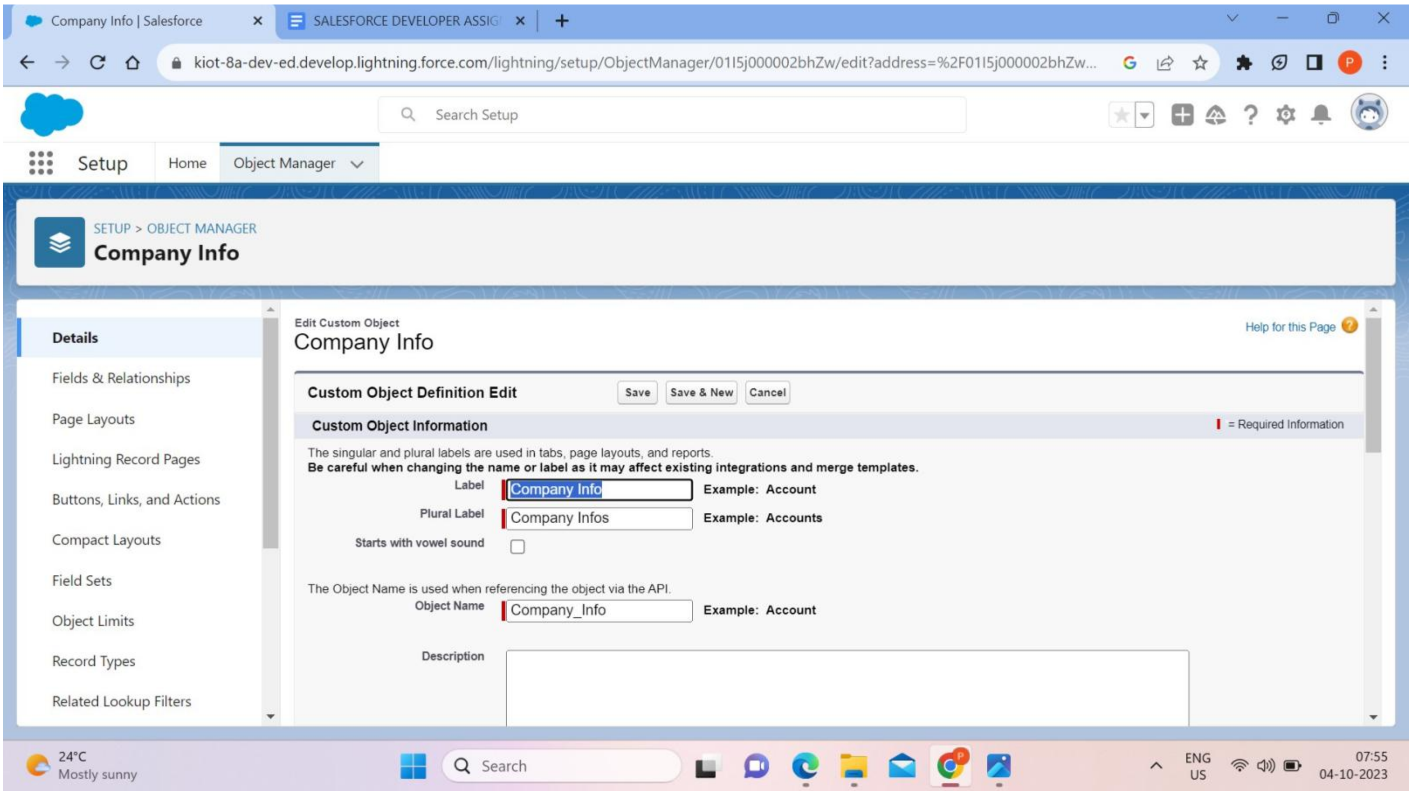
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Plural Label
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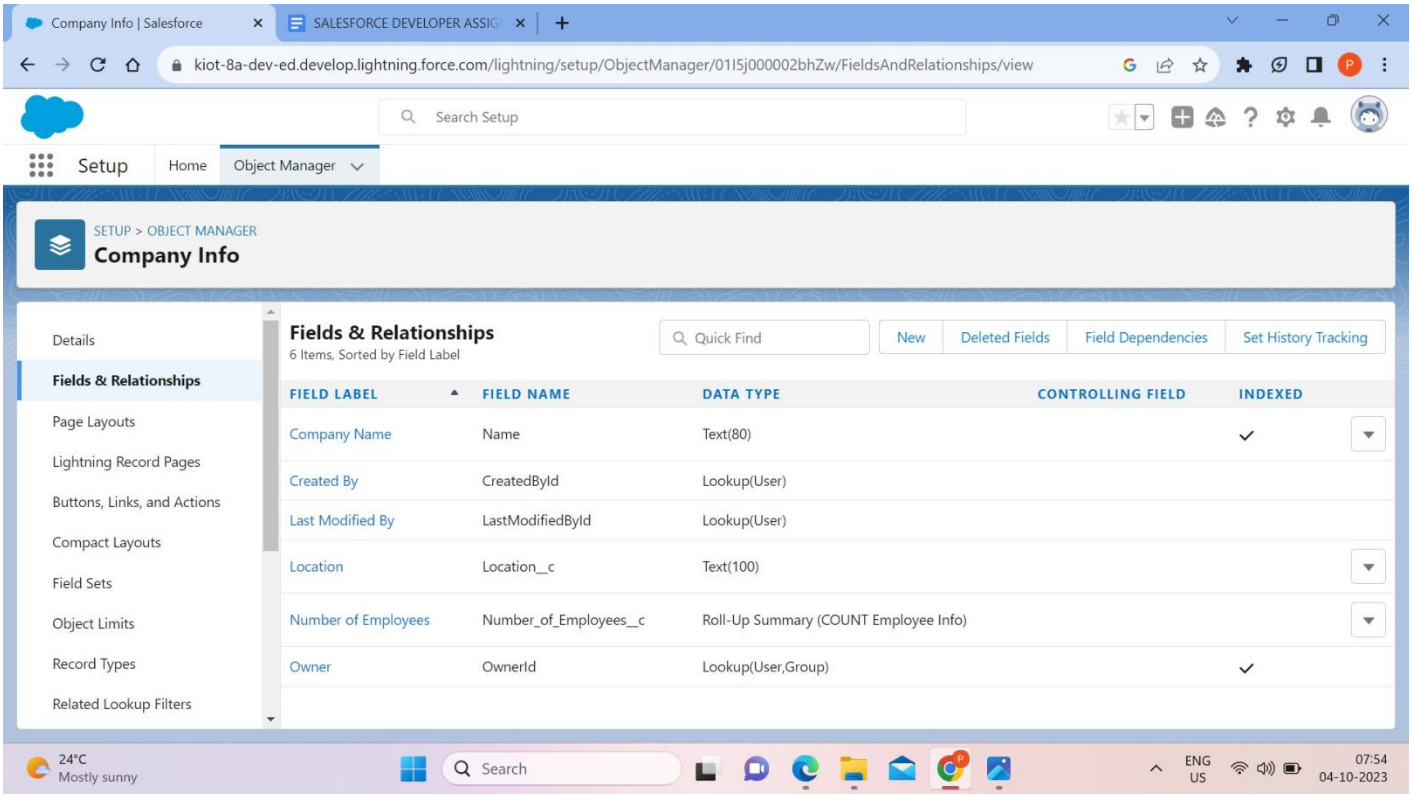
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Field Sets
Object Limits
Record Types
Related Lookup Filters
Fields & Relationships
6 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIELD
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Company Name
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Text(80)
Created By
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Lookup(User)
Last Modified By
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Location
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Text(100)
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Number_of_Employees__c
Roll-Up Summary (COUNT Employee Info)
Owner
OwnerId
Lookup(User,Group)
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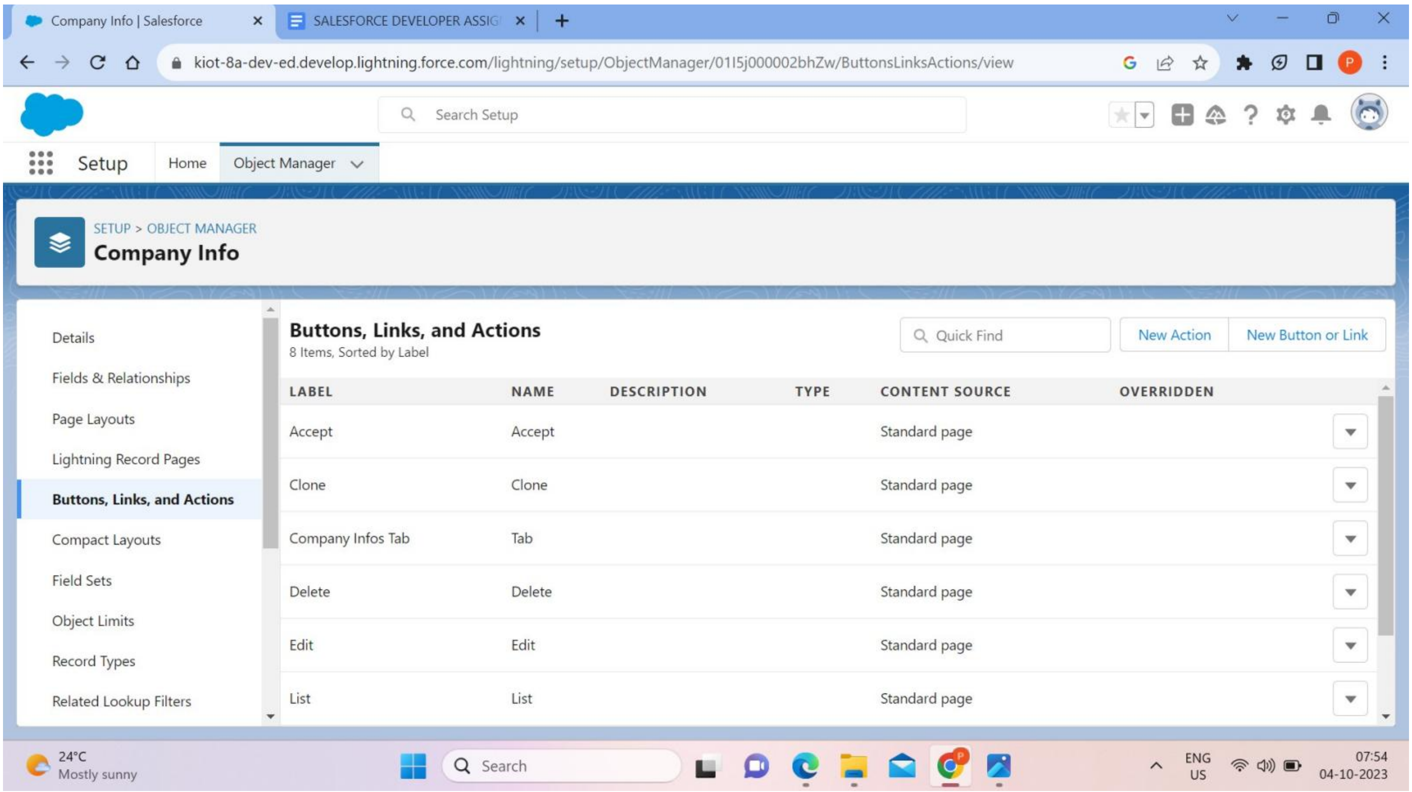
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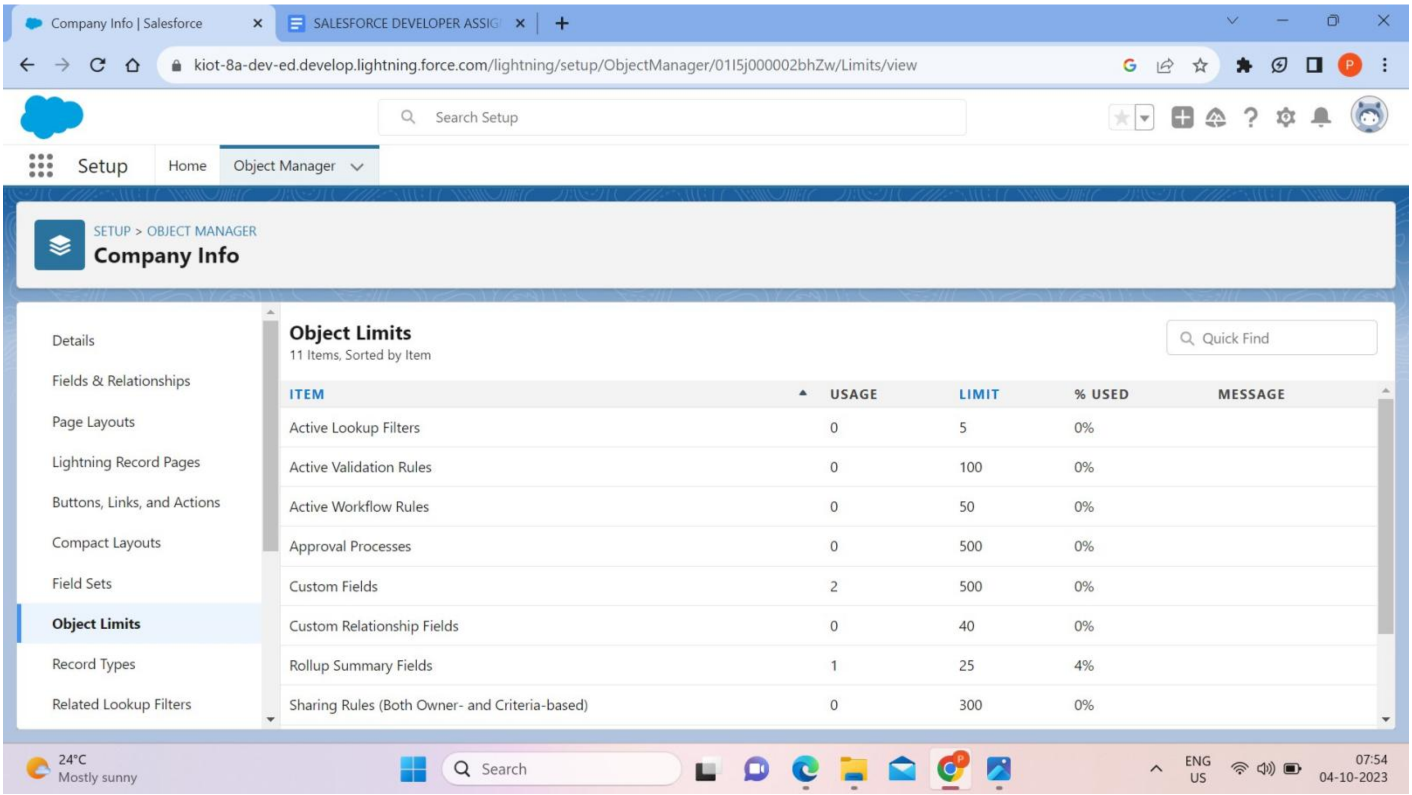
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ITEM
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Active Workflow Rules
0
50
0%
Approval Processes
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0%
Custom Fields
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0%
Custom Relationship Fields
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40
0%
Rollup Summary Fields
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4%
Sharing Rules (Both Owner- and Criteria-based)
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0%
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2.Create Master-Detail Relationship:

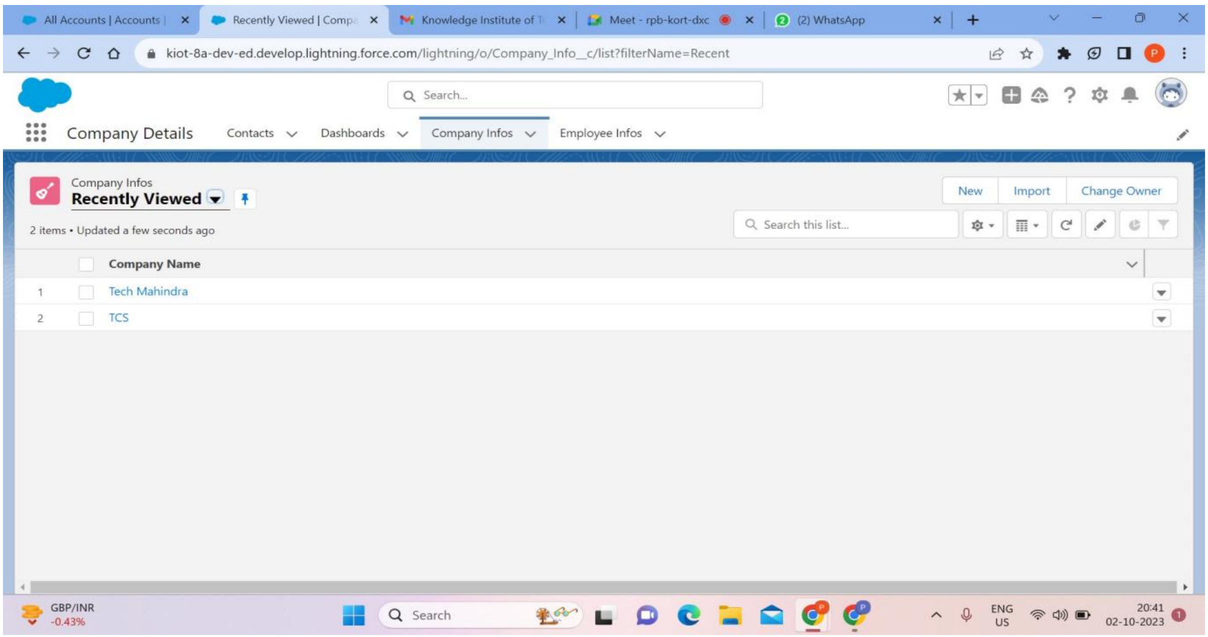
- Go to "Setup" by clicking on the gear icon in the top-right corner.
- Under "Objects and Fields," click on "Object Manager."
- Click on "Child_Object__c" to open its settings.
- In the "Fields & Relationships" section, click on "New Relationship."
- Choose "Master-Detail Relationship" as the type of 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.

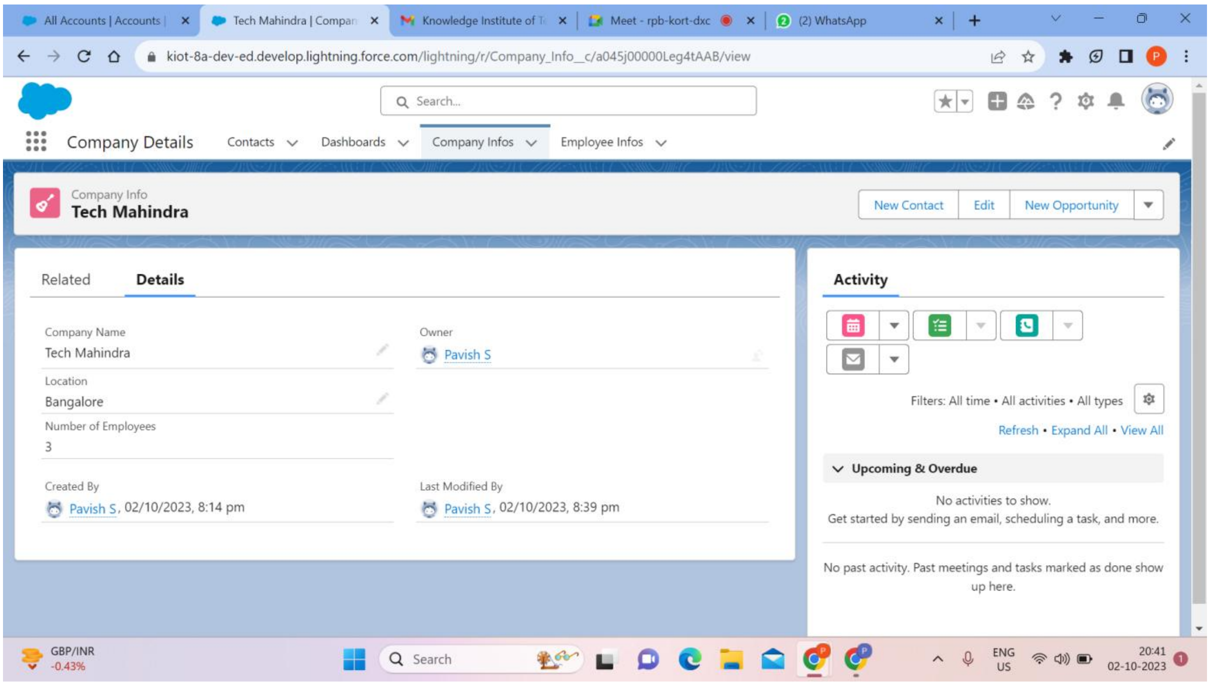
3.Create Roll-Up Summary Field:

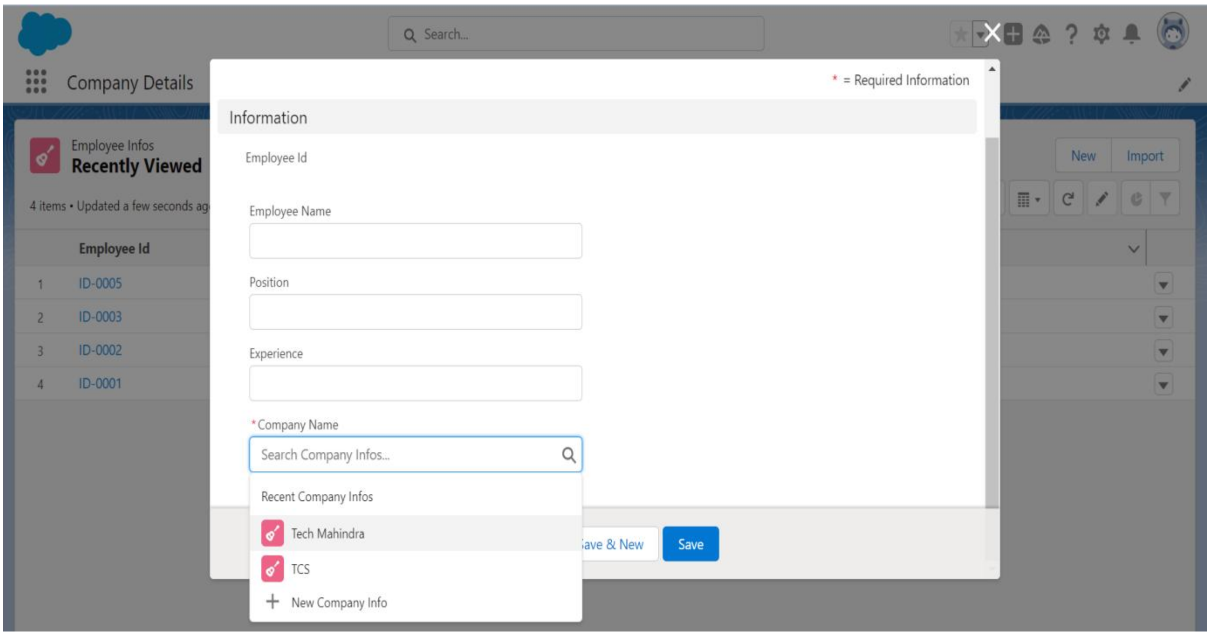
-After creating the Master-Detail Relationship, go back to the "Parent_Object__c" settings.

-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:

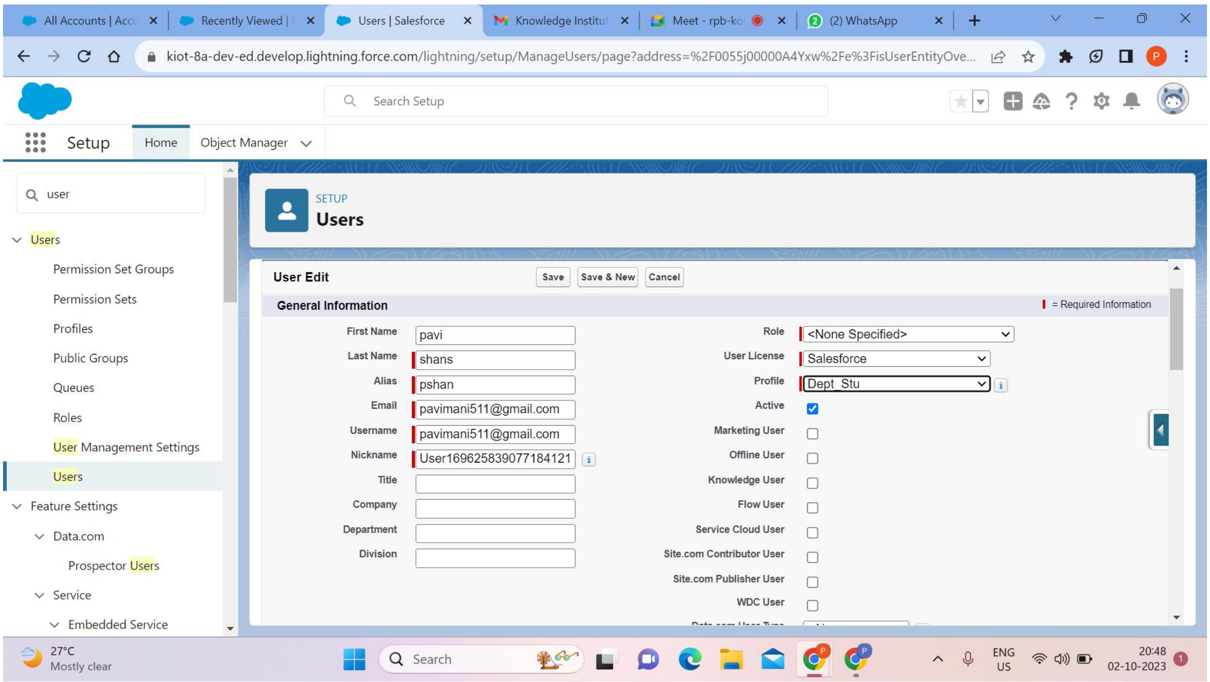
- Click the "Save" button to create the user.

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.



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.

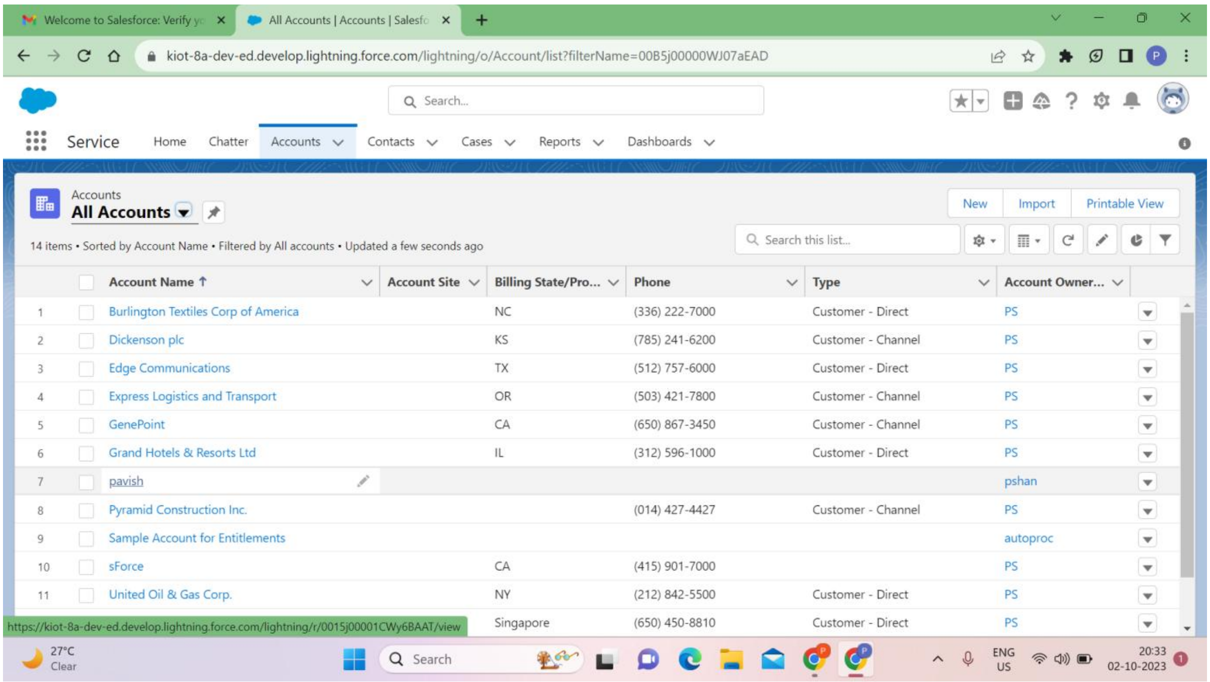
Sharing rules are automatic exceptions to org-wide defaults for particular groups of users, to give them access to records they don't own or can't normally see.

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.



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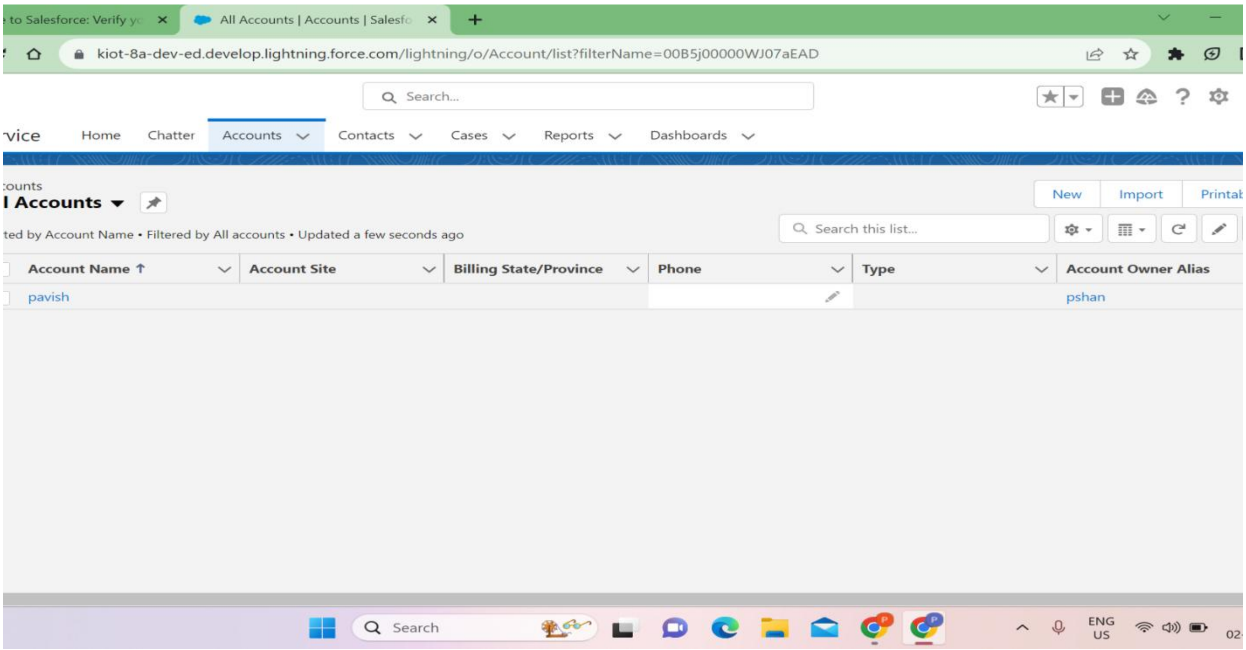


3. Suppose there are 2 Users and they are having Create, Read, Edit access on Account Object with the same profile but we want to open up the access for one user to delete how will you implement the Security setting.

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.

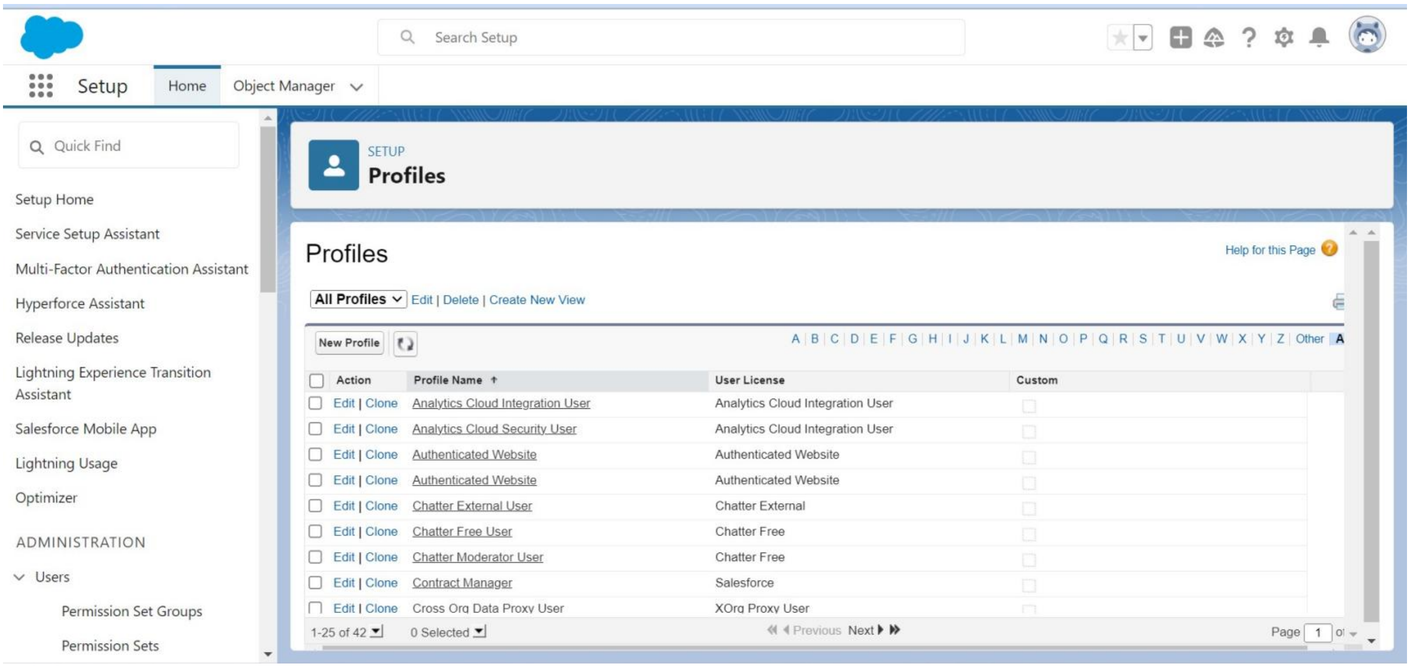
4.Remove Delete Access from Profile:

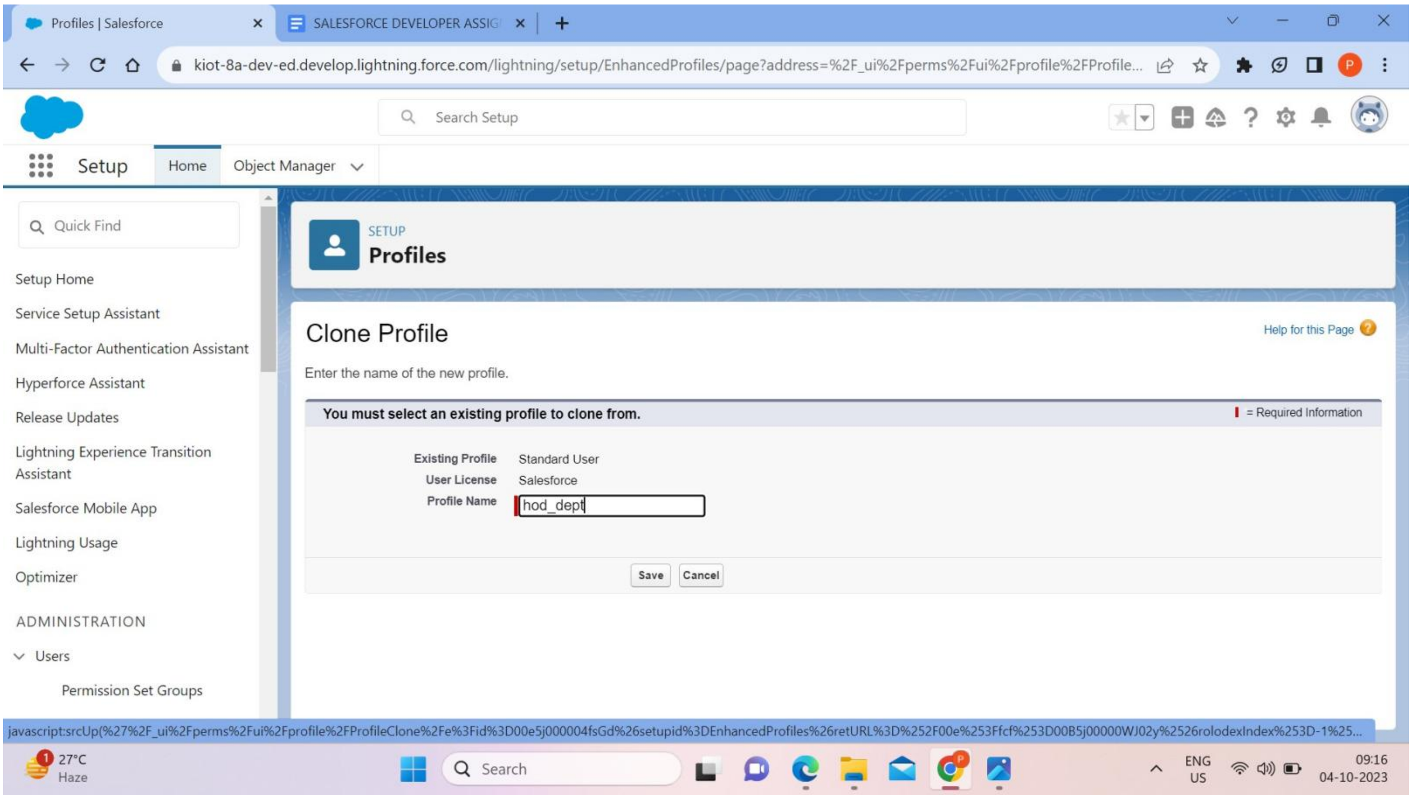
- Go to the profile assigned to both users.

- 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.

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Quick Find
Setup Home
Service Setup Assistant
Multi-Factor Authentication Assistant
Hyperforce Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Permission Set Groups
SETUP
Profiles
Clone Profile
Help for this Page
Enter the name of the new profile.
You must select an existing profile to clone from.
= Required Information
Existing Profile
Standard User
User License
Salesforce
Profile Name
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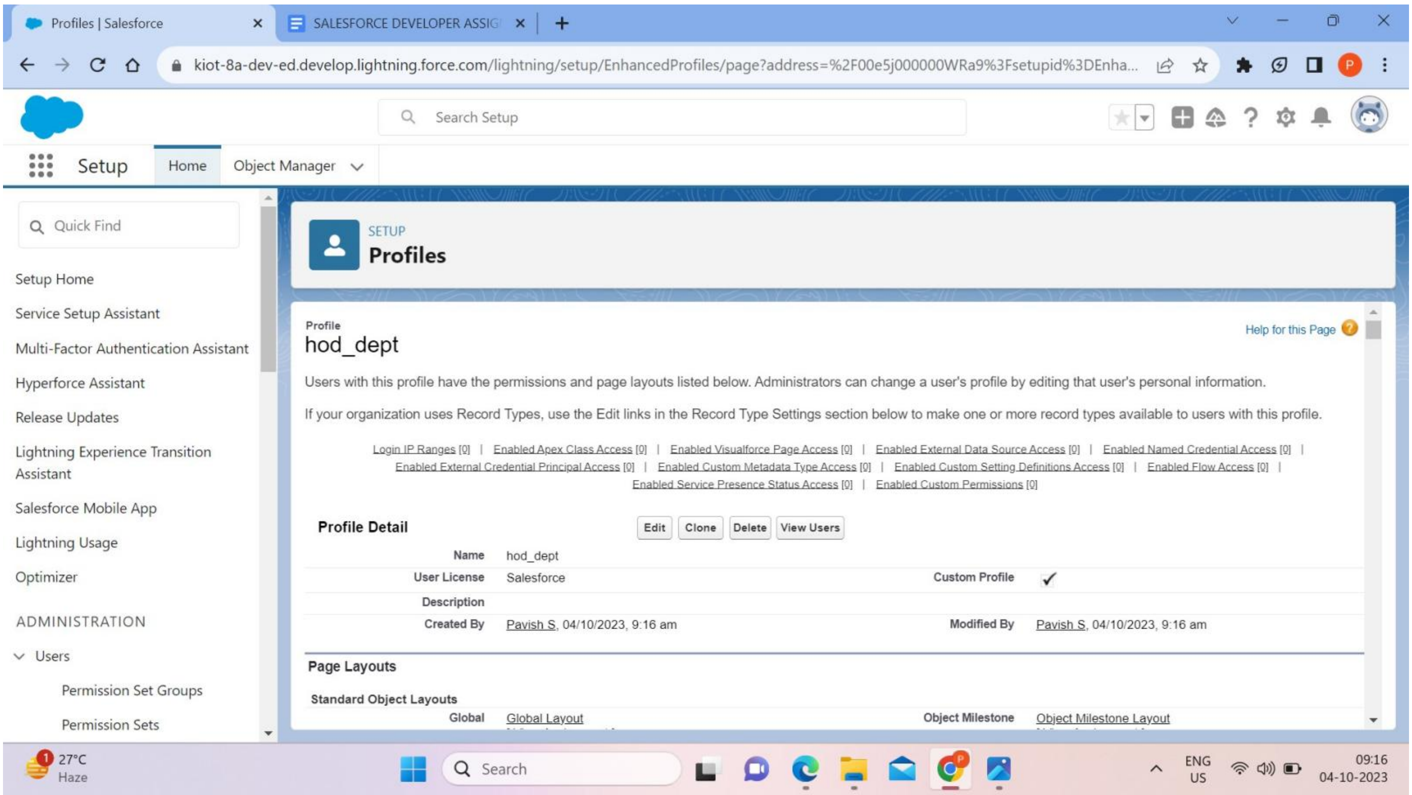
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Hyperforce Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Permission Set Groups
Permission Sets
SETUP
Profiles
Profile
hod_dept
Help for this Page
Users with 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.
Login IP Ranges [0] | Enabled Apex Class Access [0] | Enabled Visualforce Page Access [0] | Enabled External Data Source Access [0] | Enabled Named Credential Access [0] |
Enabled External Credential Principal Access [0] | Enabled Custom Metadata Type Access [0] | Enabled Custom Setting Definitions Access [0] | Enabled Flow Access [0] |
Enabled Service Presence Status Access [0] | Enabled Custom Permissions [0]
Profile Detail
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User License
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Modified By
Pavish S, 04/10/2023, 9:16 am
Page Layouts
Standard Object Layouts
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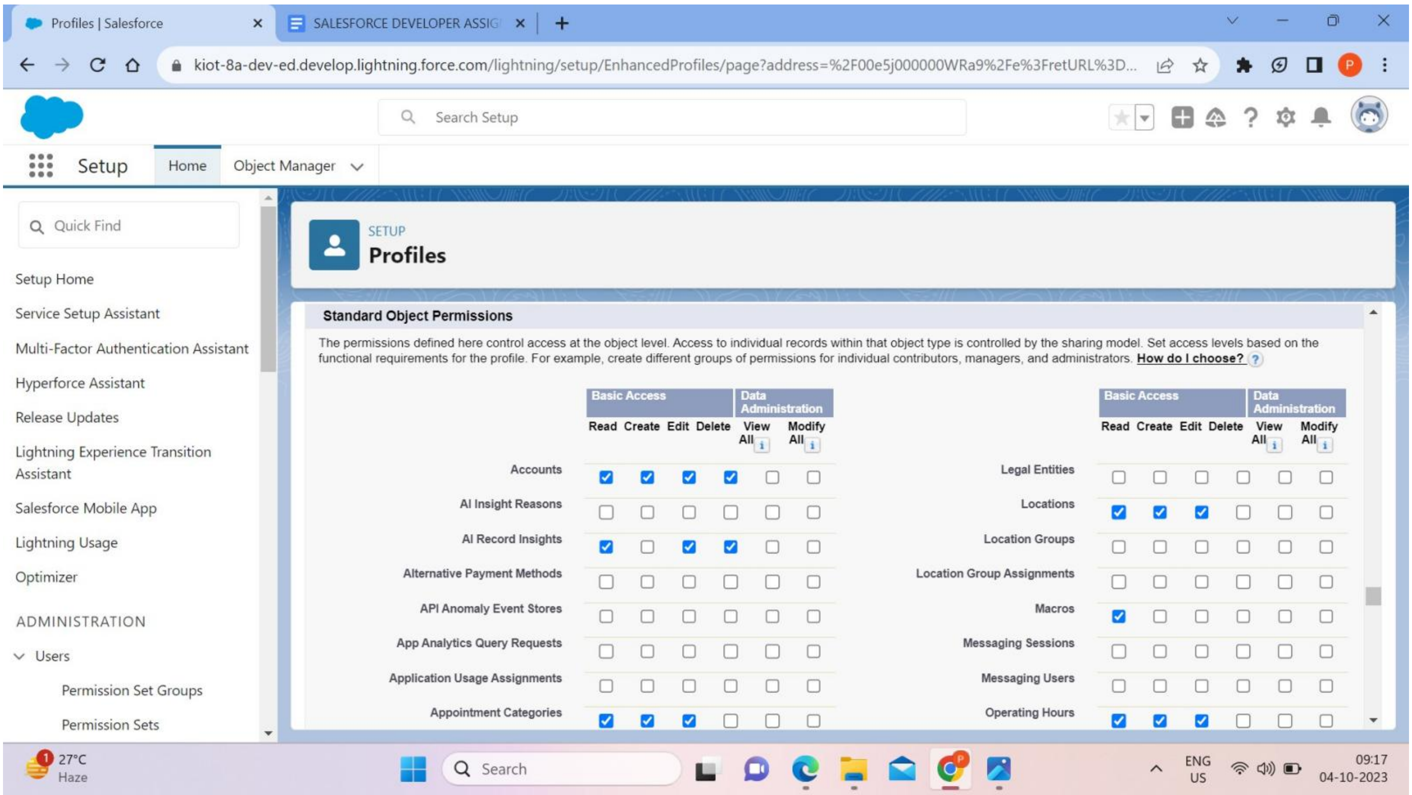
09:16
04-10-2023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Setup Home
Service Setup Assistant
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Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Permission Set Groups
Permission Sets
SETUP
Profiles
Standard Object Permissions
The permissions defined here control access at the object level. Access to individual records within that object type is controlled by the sharing model. Set access levels based on the functional requirements for the profile. For example, create different groups of permissions for individual contributors, managers, and administrators. 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
Legal Entities
Locations
Location Groups
Location Group Assignments
Macros
Messaging Sessions
Messaging Users
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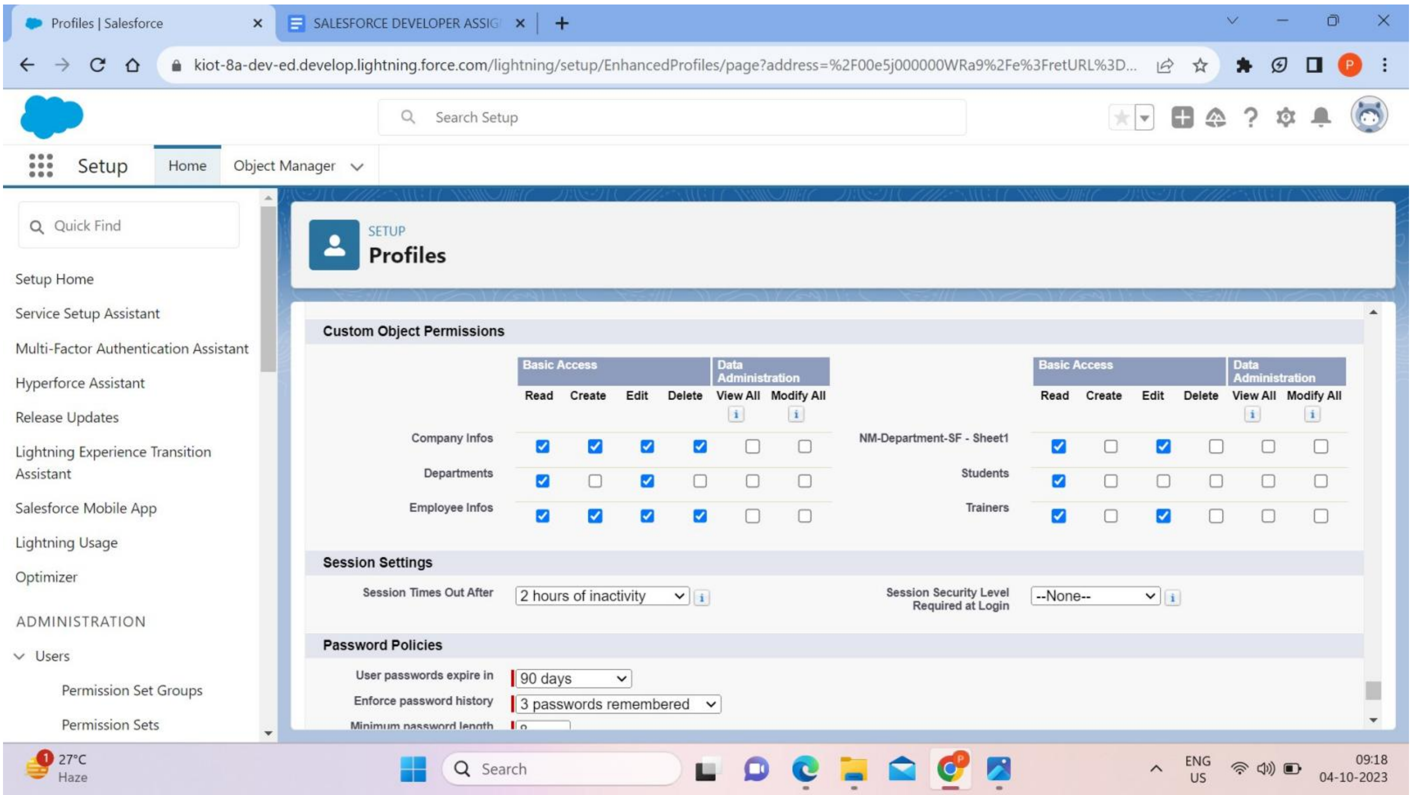
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Service Setup Assistant
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Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Permission Set Groups
Permission Sets
SETUP
Profiles
Custom Object Permissions
Basic Access
Data Administration
Read Create Edit Delete View All Modify All
Company Infos
Departments
Employee Infos
NM-Department-SF - Sheet1
Students
Trainers
Session Settings
Session Times Out After
2 hours of inactivity
Session Security Level Required at Login
--None--
Password Policies
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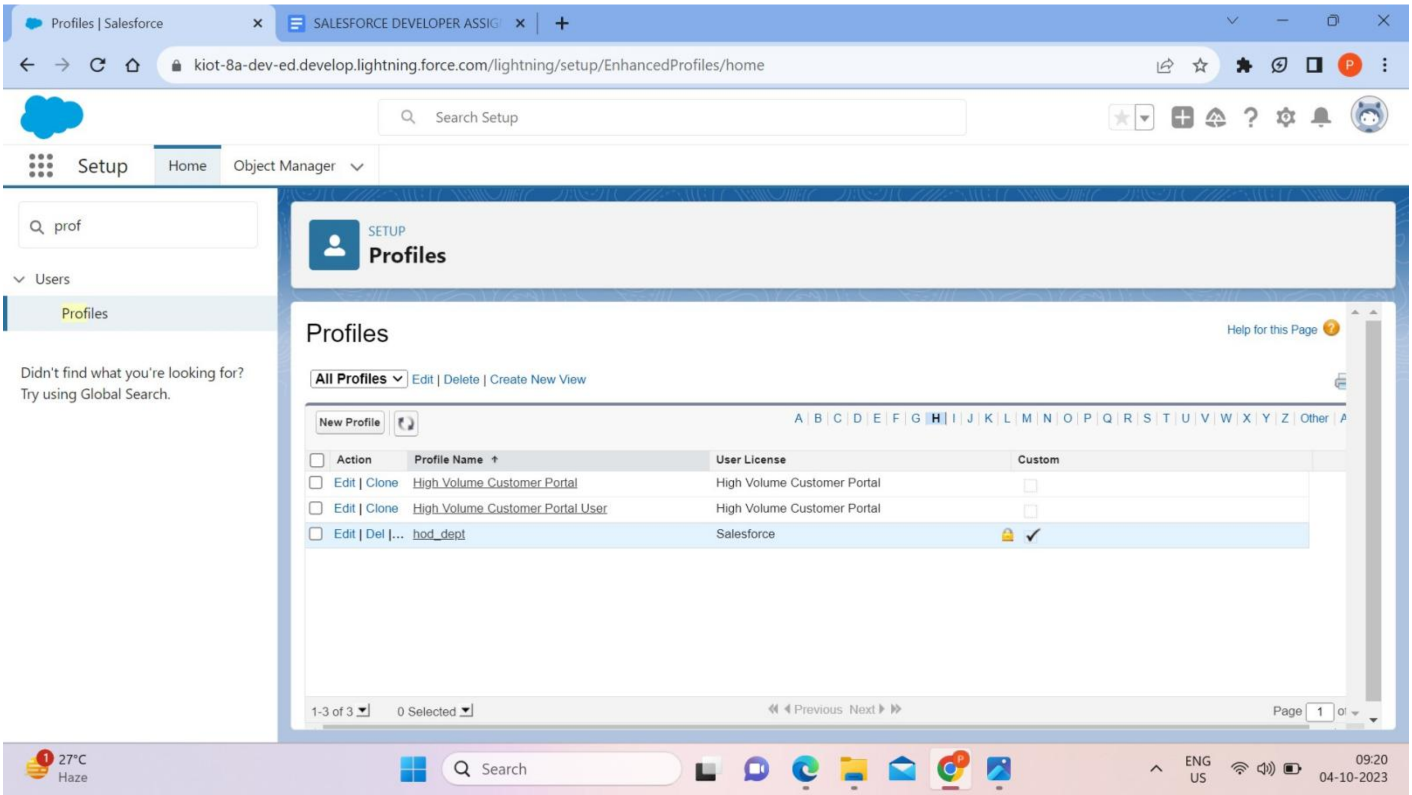

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Search Setup
Setup
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Object Manager
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Users
Profiles
Didn't find what you're looking for? Try using Global Search.
SETUP
Profiles
Profiles
Help for this Page
All Profiles
Edit | Delete | Create New View
New Profile
Action
Profile Name
User License
Custom
Edit | Clone High Volume Customer Portal High Volume Customer Portal
Edit | Clone High Volume Customer Portal User High Volume Customer Portal
Edit | Del |... hod_dept Salesforce
1-3 of 3
0 Selected
Previous Next
Page 1
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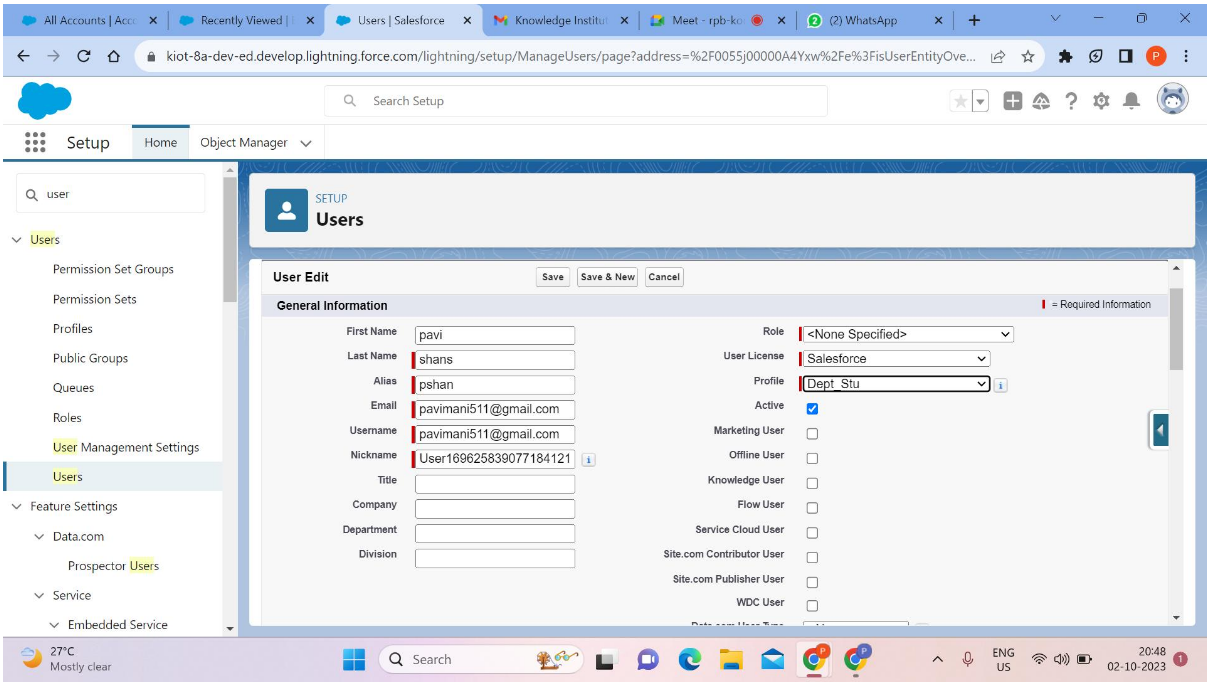

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General Information
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First Name pavi
Last Name shans
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Email pavimani511@gmail.com
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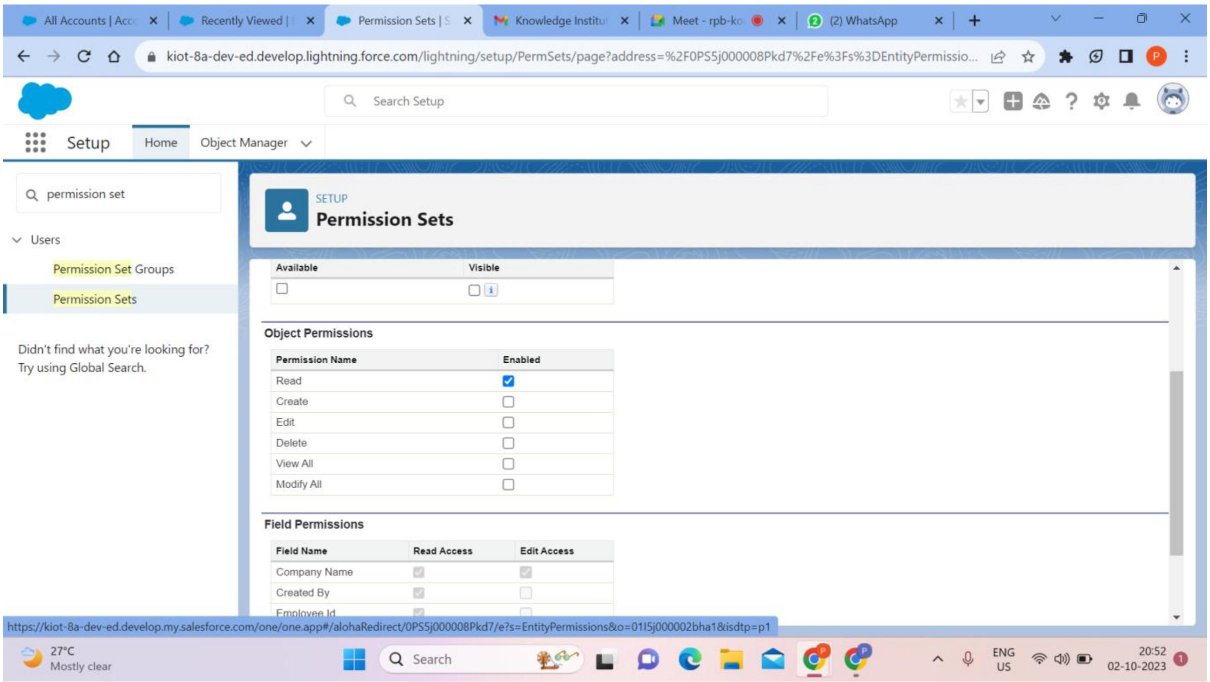
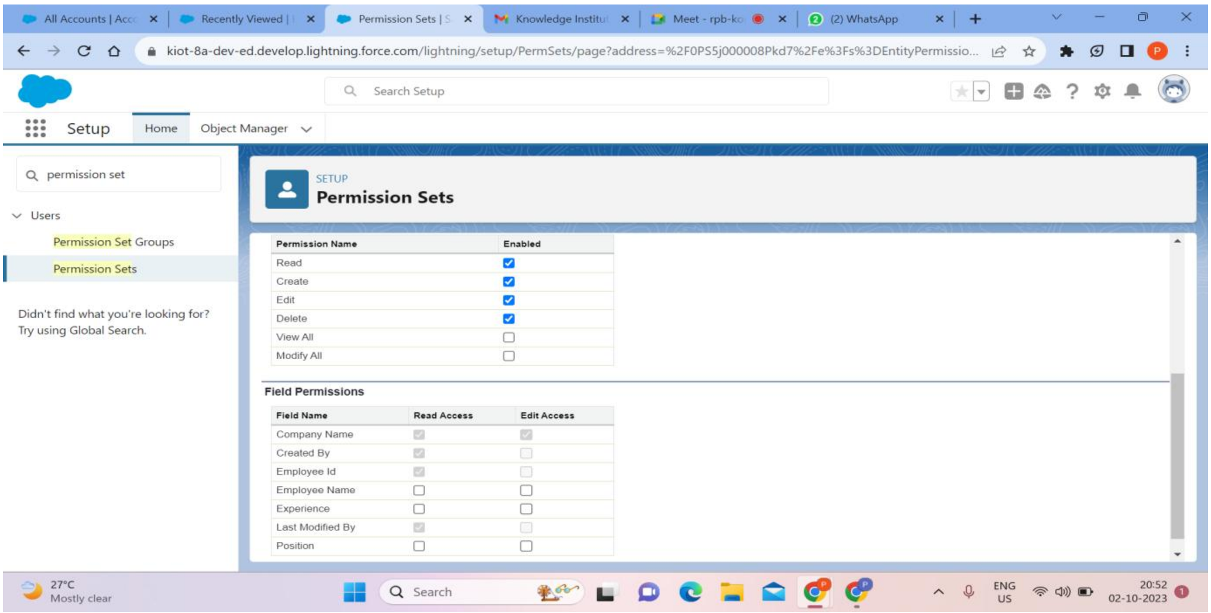


Permission Sets:



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

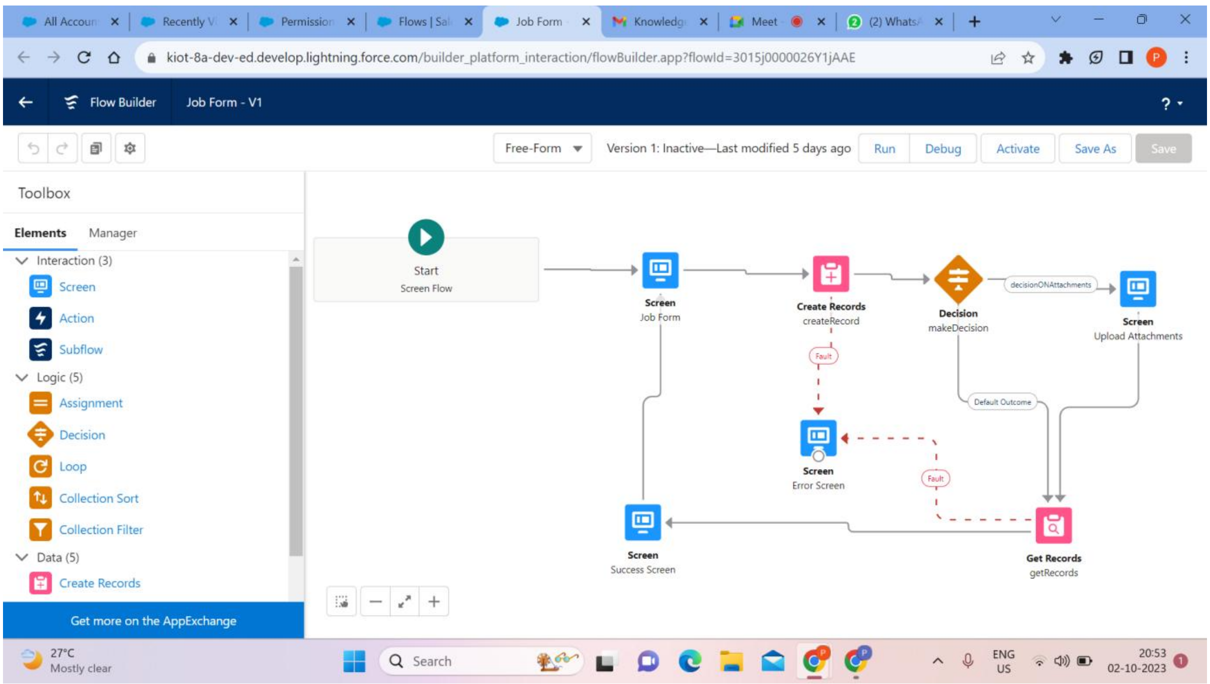
1. Drag and drop a "Screen" element onto the canvas. This will be the starting point of your flow.

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.

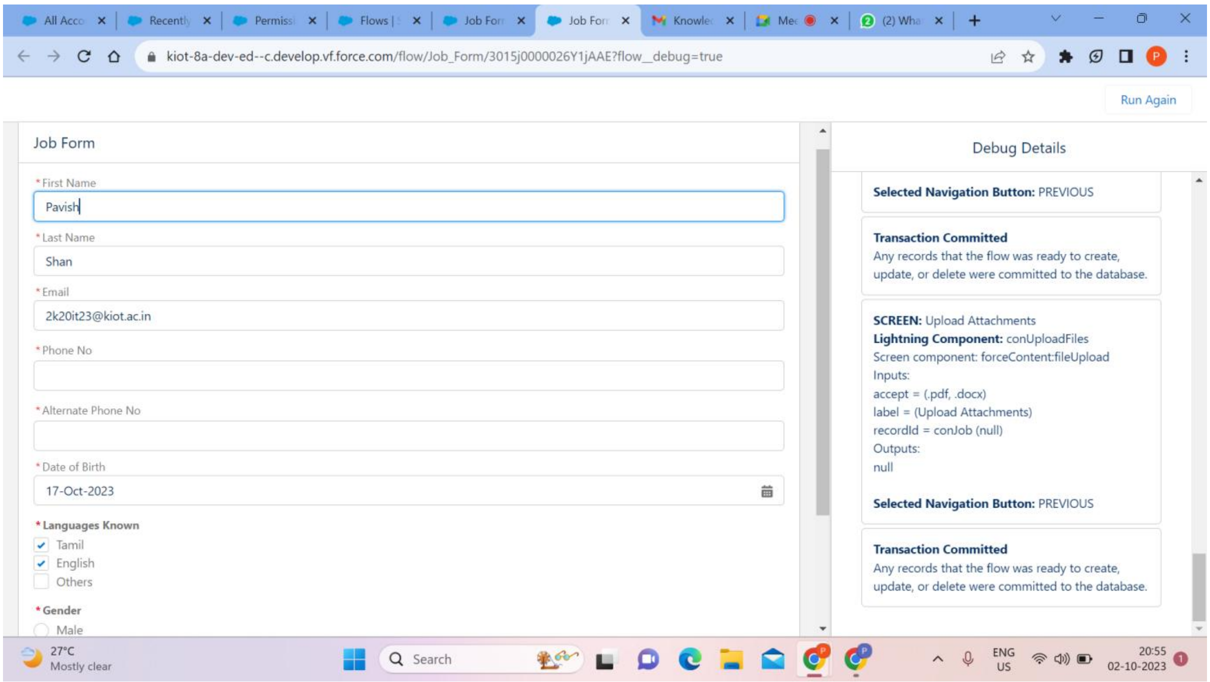
4. Drag and drop the appropriate input elements (e.g., text fields, radio buttons, checkboxes) onto the screen for users to input their survey details. You can find these elements in the palette on the left.

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



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.


kiot-8a-dev-ed--c.develop.vf.force.com/flow/Job_Form/3015j0000026Y1jAAE?flow__debug=true
Run Again
Job Form
* First Name
Pavish
* Last Name
Shan
* Email
2k20it23@kiot.ac.in
* Phone No
* Alternate Phone No
* Date of Birth
17-Oct-2023
* Languages Known
Tamil
English
Others
* Gender
Male
Debug Details
Selected Navigation Button: PREVIOUS
Transaction Committed
Any records that the flow was ready to create, update, or delete were committed to the database.
SCREEN: Upload Attachments
Lightning Component: conUploadFiles
Screen component: forceContent:fileUpload
Inputs:
accept = (.pdf, .docx)
label = (Upload Attachments)
recordId = conJob (null)
Outputs:
null
Selected Navigation Button: PREVIOUS
Transaction Committed
Any records that the flow was ready to create, update, or delete were committed to the database.
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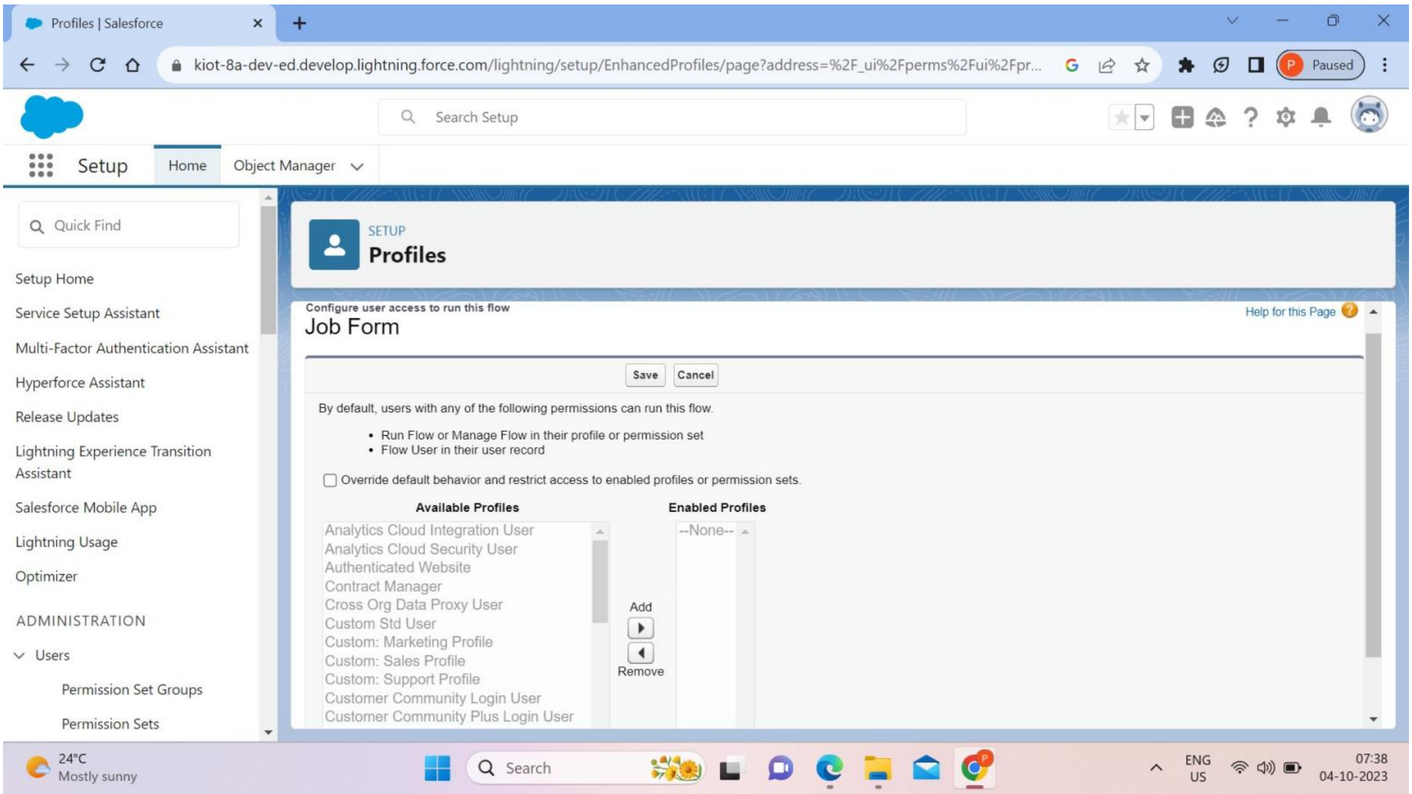
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Object Manager
Quick Find
Setup Home
Service Setup Assistant
Multi-Factor Authentication Assistant
Hyperforce Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Permission Set Groups
Permission Sets
SETUP
Profiles
Configure user access to run this flow
Job Form
Help for this Page
Save
Cancel
By default, users with any of the following permissions can run this flow.
Run Flow or Manage Flow in their profile or permission set
Flow User in their user record
Override default behavior and restrict access to enabled profiles or permission sets.
Available Profiles
Enabled Profiles
Analytics Cloud Integration User
Analytics Cloud Security User
Authenticated Website
Contract Manager
Cross Org Data Proxy User
Custom Std User
Custom: Marketing Profile
Custom: Sales Profile
Custom: Support Profile
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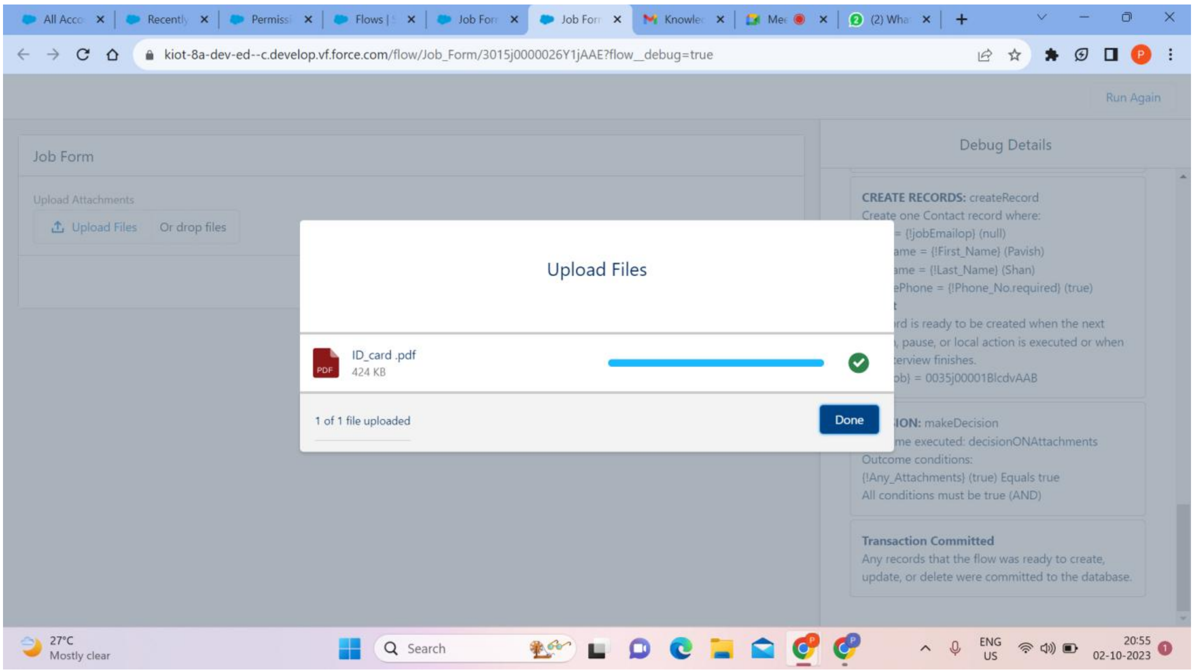
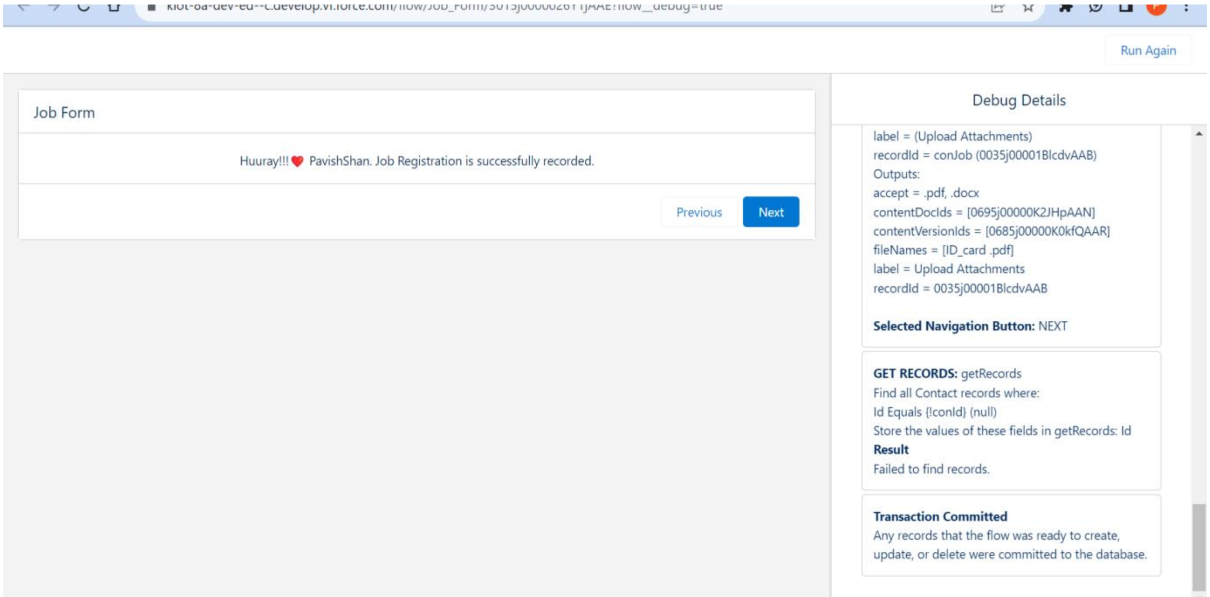




Step 7: Create a Finish Screen

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

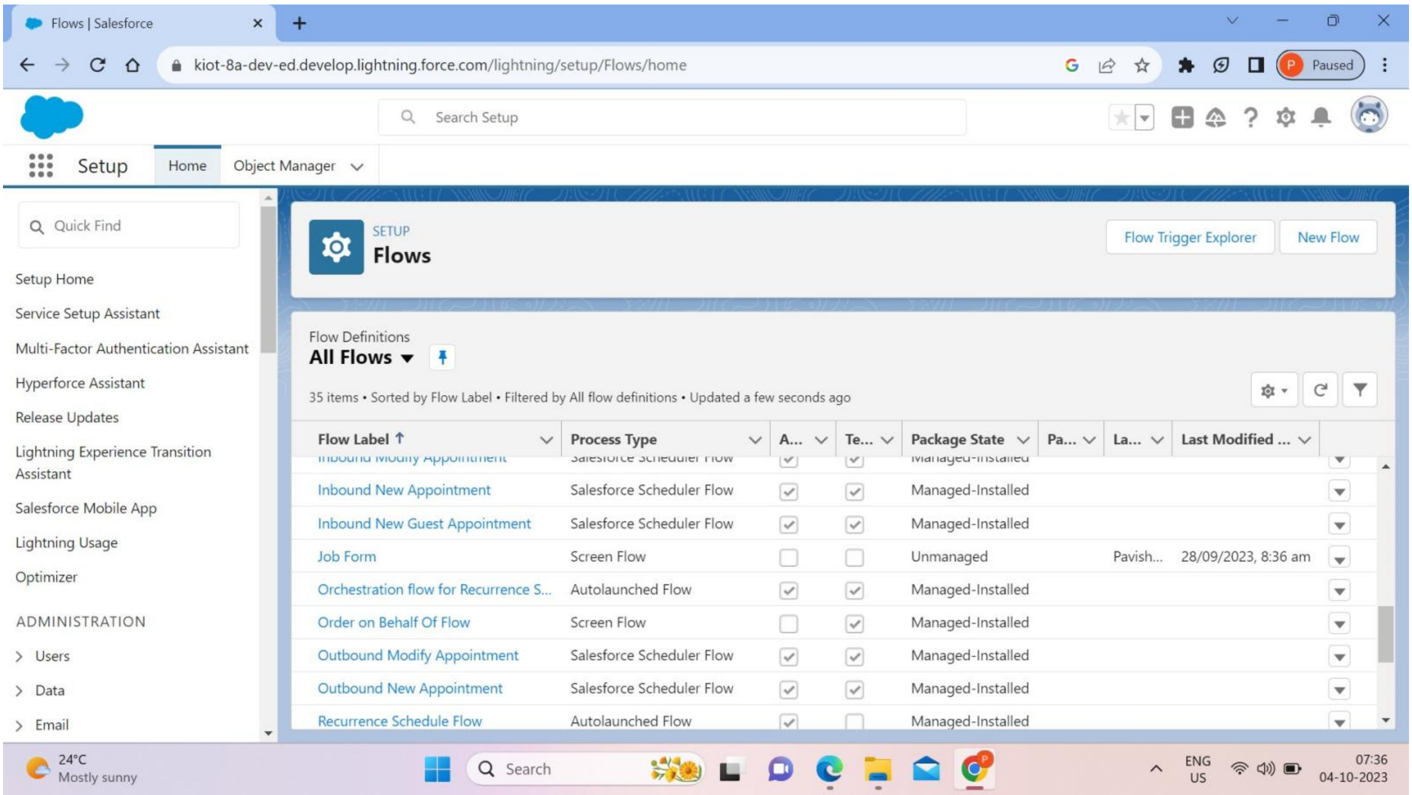
Connect the screens and elements in the desired order by dragging connectors between them.

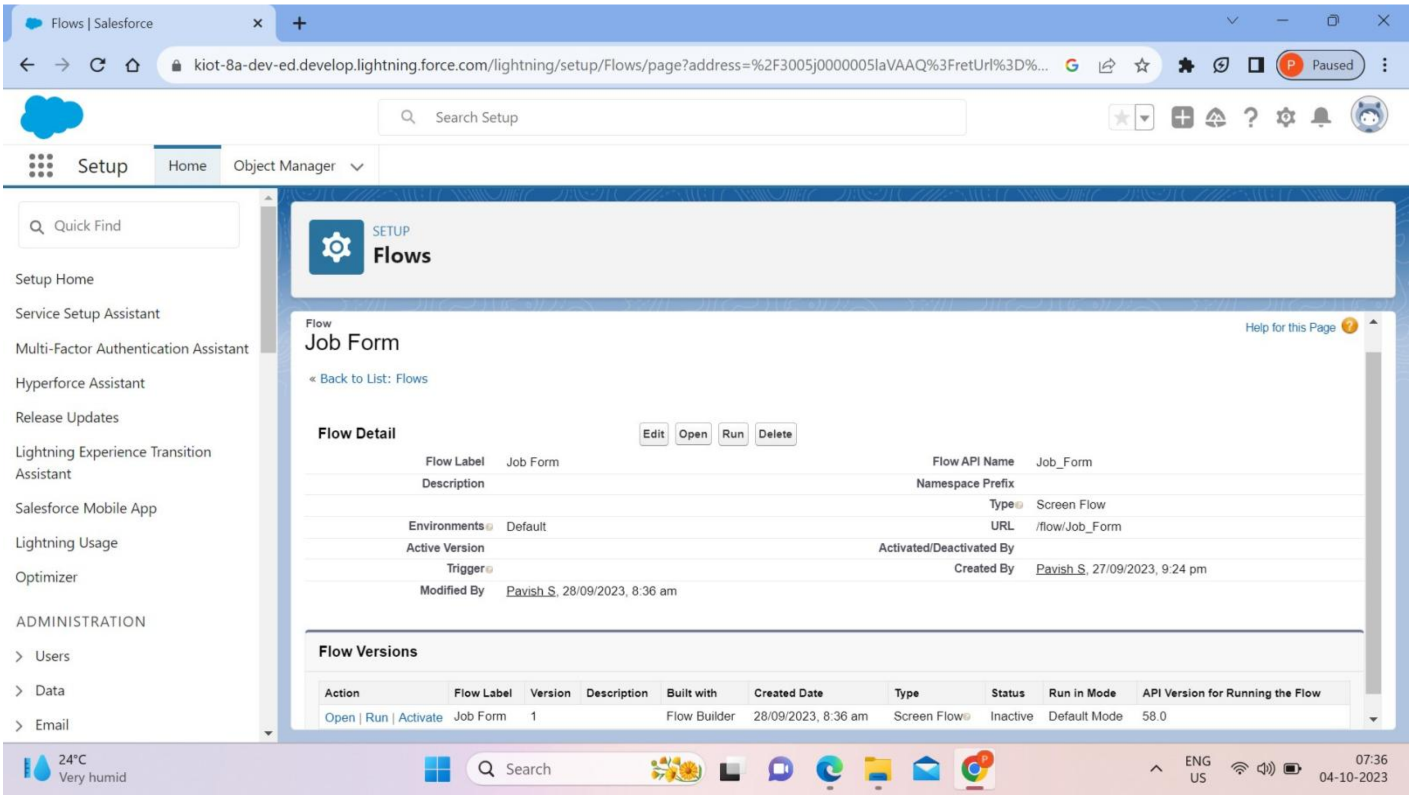
Step 9: Set the Flow Properties

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.




Flows | Salesforce
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Object Manager
Quick Find
Setup Home
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Multi-Factor Authentication Assistant
Hyperforce Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Data
Email
SETUP
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Flow
Job Form
Help for this Page
« Back to List: Flows
Flow Detail
Edit
Open
Run
Delete
Flow Label Job Form
Flow API Name Job_Form
Description
Namespace Prefix
Type Screen Flow
Environments Default
URL /flow/Job_Form
Active Version
Activated/Deactivated By
Trigger
Created By Pavish S, 27/09/2023, 9:24 pm
Modified By Pavish S, 28/09/2023, 8:36 am
Flow Versions
Action | Flow Label | Version | Description | Built with | Created Date | Type | Status | Run in Mode | API Version for Running the Flow
Open | Run | Activate | Job Form | 1 | | Flow Builder | 28/09/2023, 8:36 am | Screen Flow | Inactive | Default Mode | 58.0
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