SALESFORCE DEVELOPER (NAAN MUDHALVAN)

ASSIGNMENT 1

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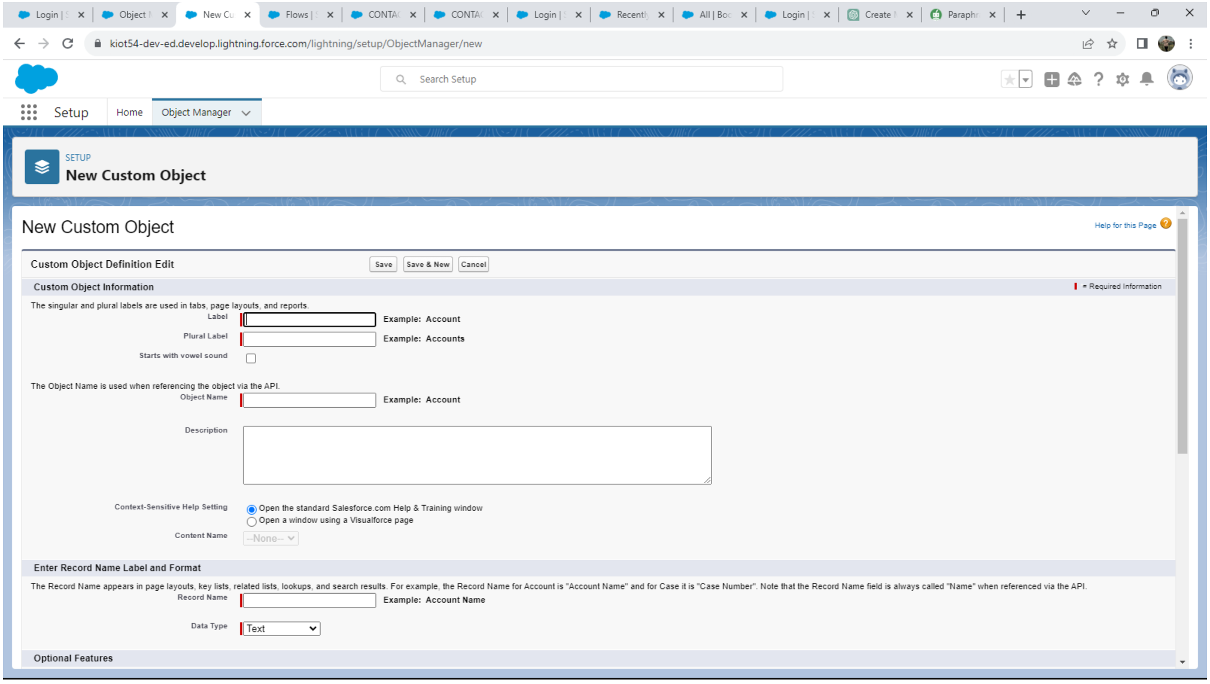
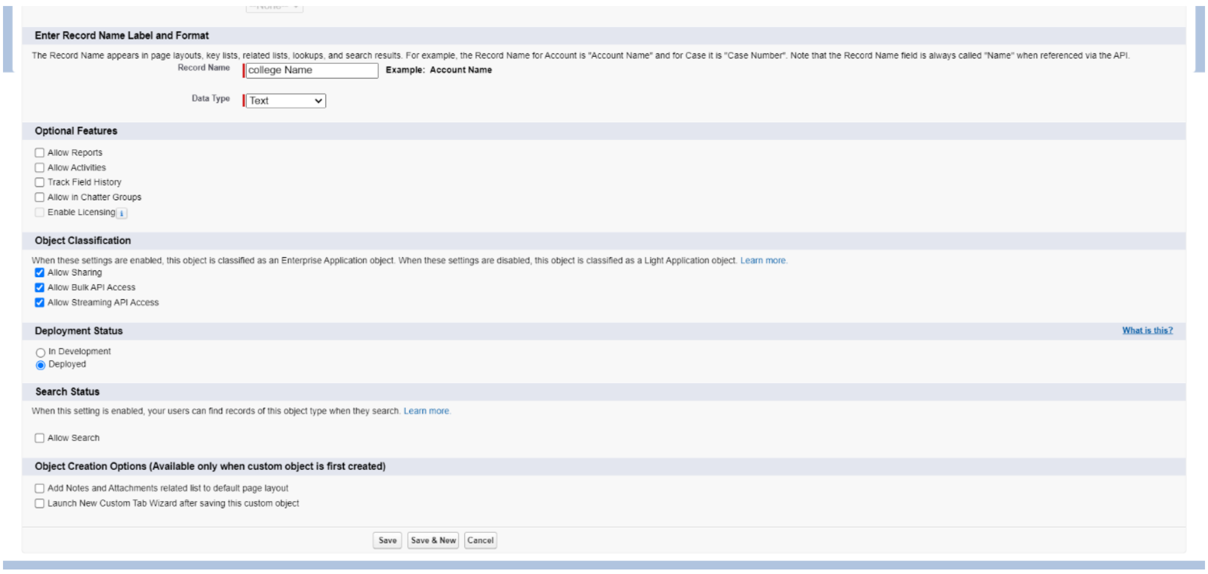
NM Id: AU611220205009

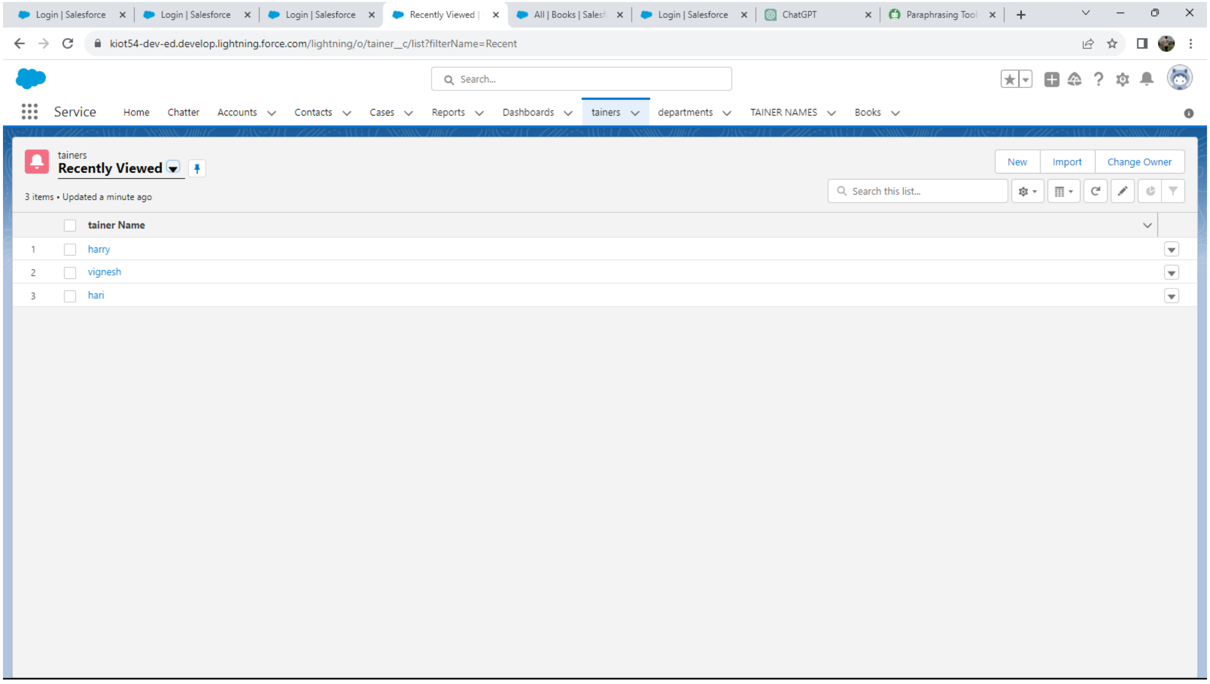
1.Create a Master-Detail Relationship between two Custom objects and also create a Roll Up Summary Field to Calculate total number of records.

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.

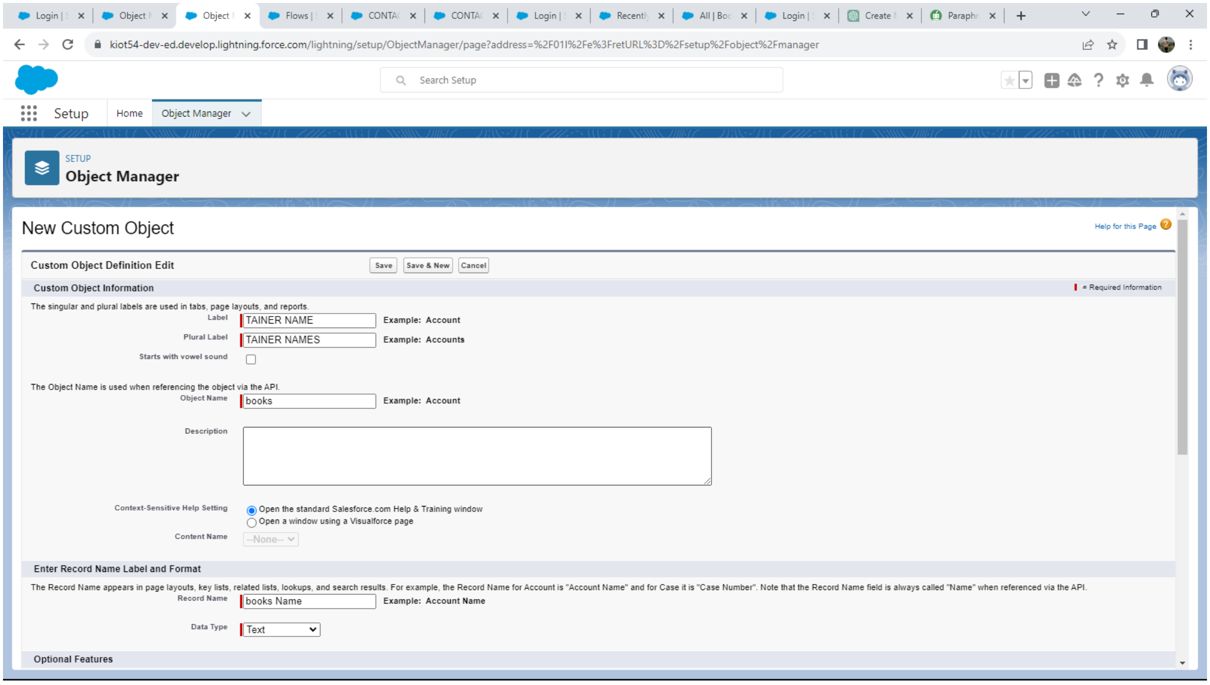
Create Custom Objects: Create the "Parent_Object__c" custom object if you haven't already.

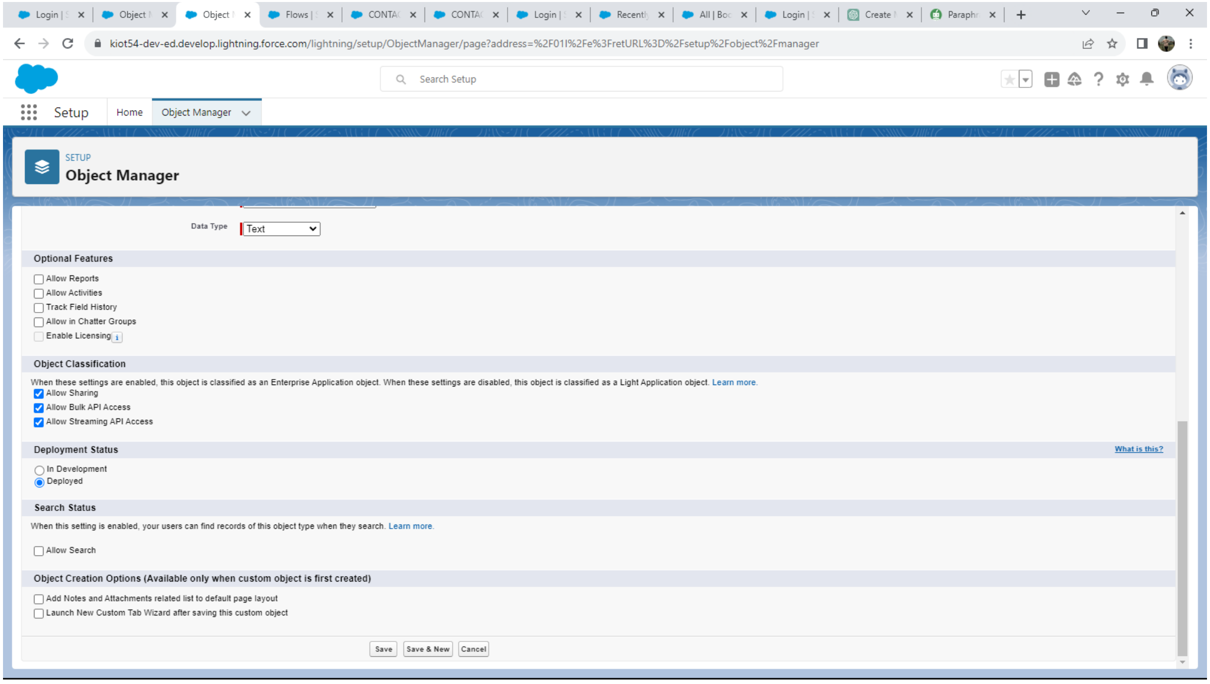


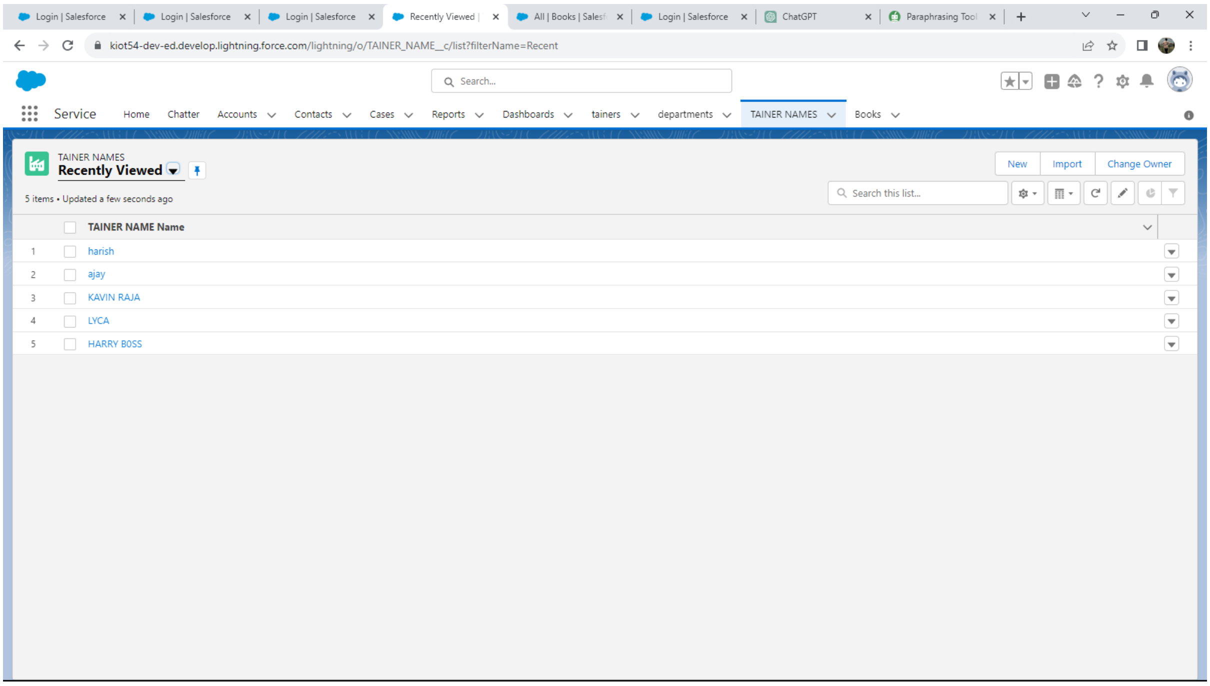




Create the "Child_Object__c" custom object if you haven't already.







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".

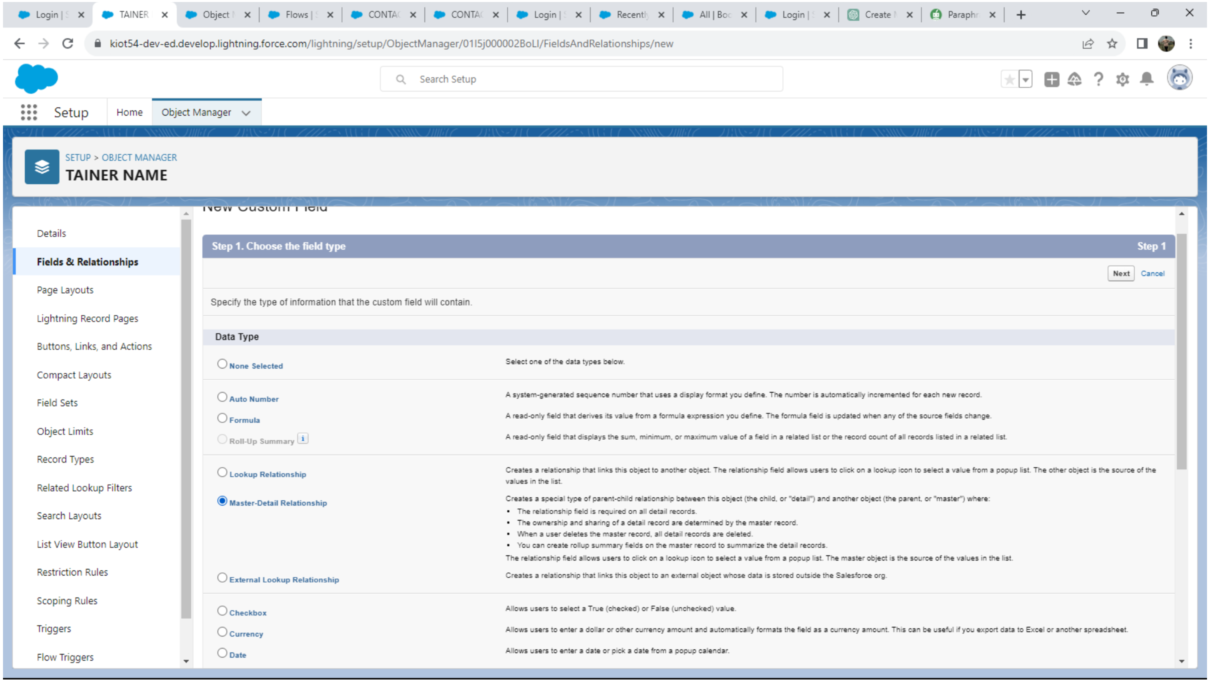
3)Select "New Relationship" under "Fields & Relationships" in the menu.

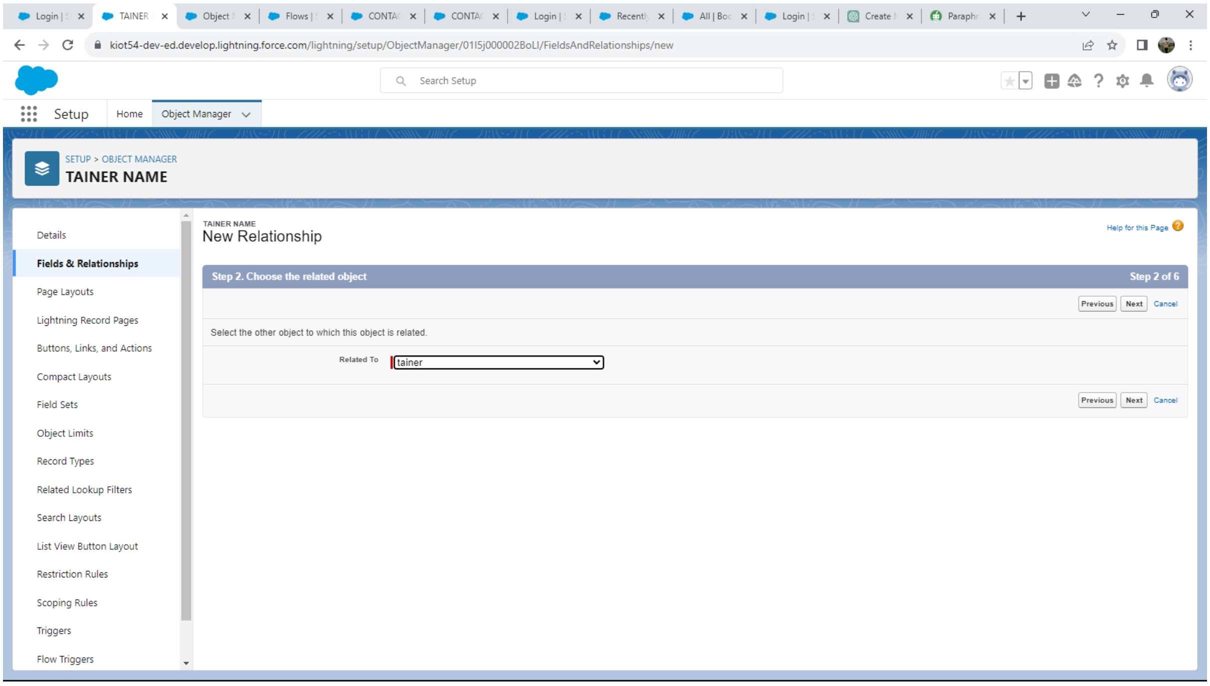
4)Select the "Master-Detail Relationship" relationship type.

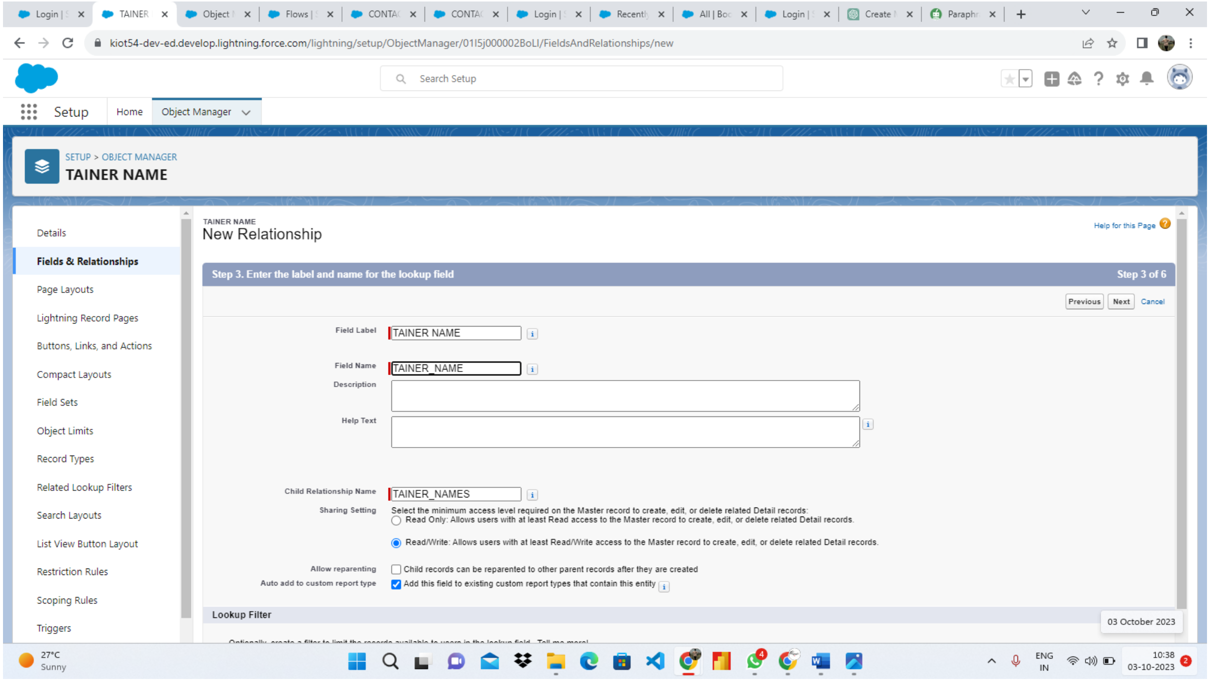
5)"Parent_Object__c" should be chosen as the parent object.

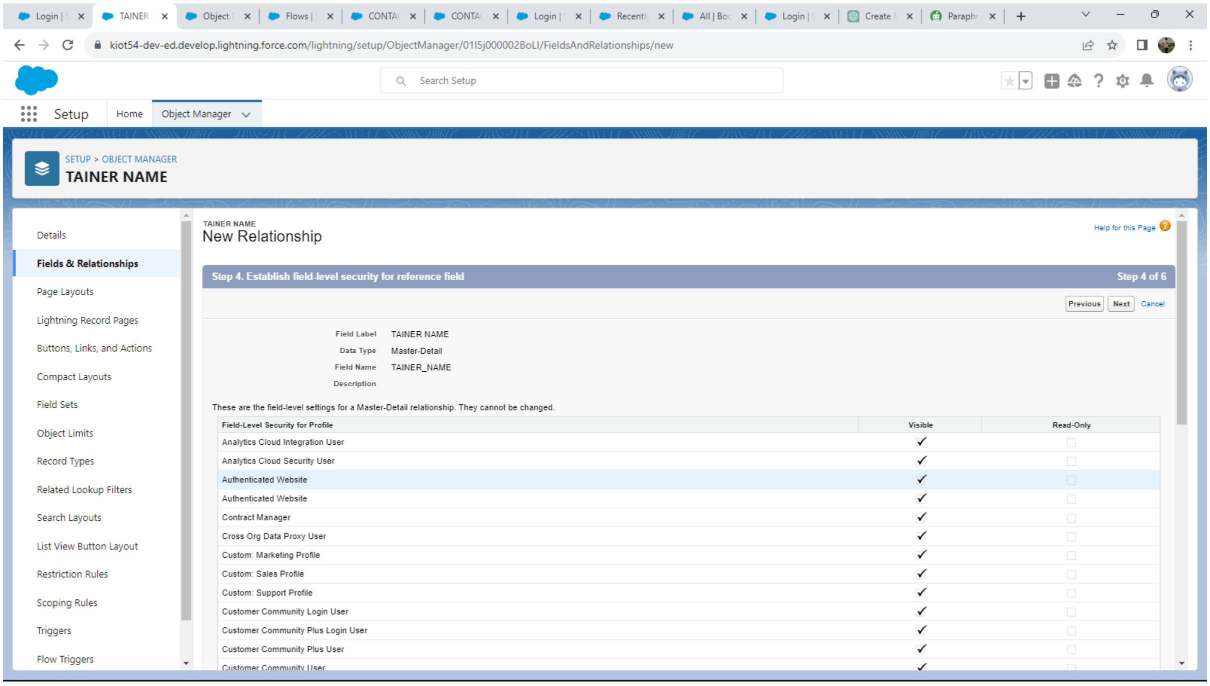
6)Give the connection a name that has meaning, such as "Parent Relationship."

7)Click "Next" to complete the process after defining additional settings such as whether they are required or not.






kiot54-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I5j000002BoLI/FieldsAndRelationships/new
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
TAINER NAME
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Triggers
TAINER NAME
New Relationship
Help for this Page
Step 3. Enter the label and name for the lookup field
Step 3 of 6
Previous
Next
Cancel
Field Label
TAINER NAME
Field Name
TAINER_NAME
Description
Help Text
Child Relationship Name
TAINER_NAMES
Sharing Setting
Select the minimum access level required on the Master record to create, edit, or delete related Detail records:
Read Only: Allows users with at least Read access to the Master record to create, edit, or delete related Detail records.
Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.
Allow reparenting
Child records can be reparented to other parent records after they are created
Auto add to custom report type
Add this field to existing custom report types that contain this entity
Lookup Filter
03 October 2023
27°C
Sunny
ENG
IN
10:38
03-10-2023


kiot54-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I5j000002BoLI/FieldsAndRelationships/new
Search Setup
Setup
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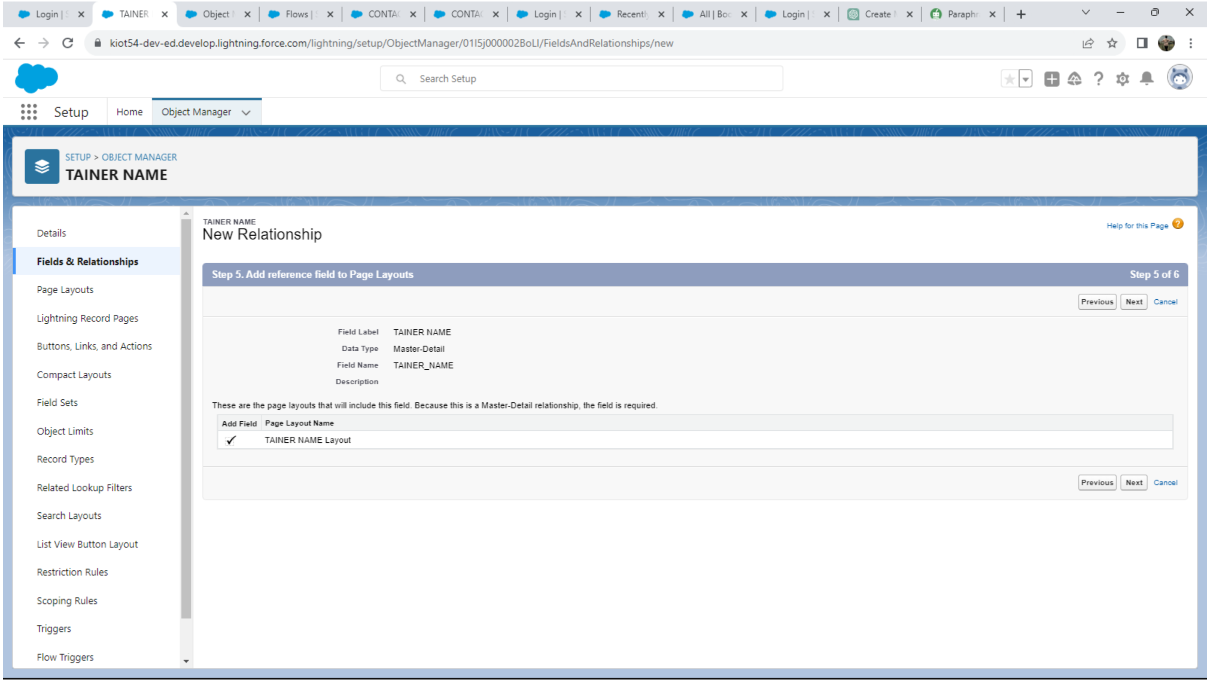
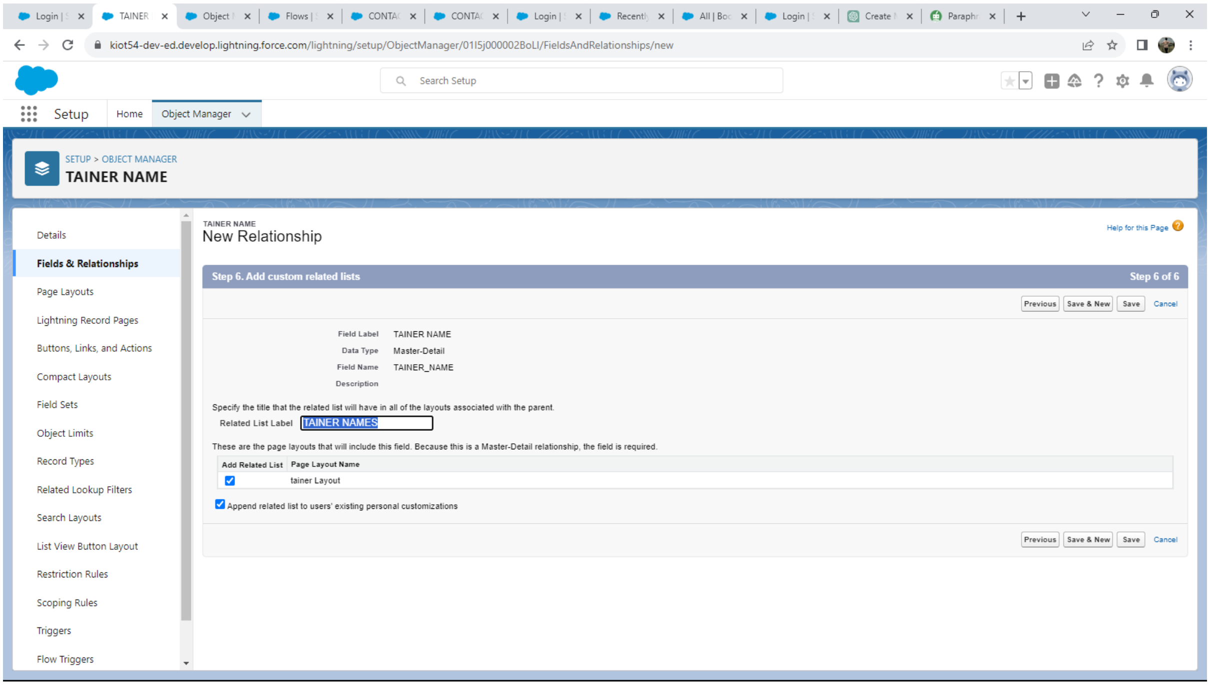
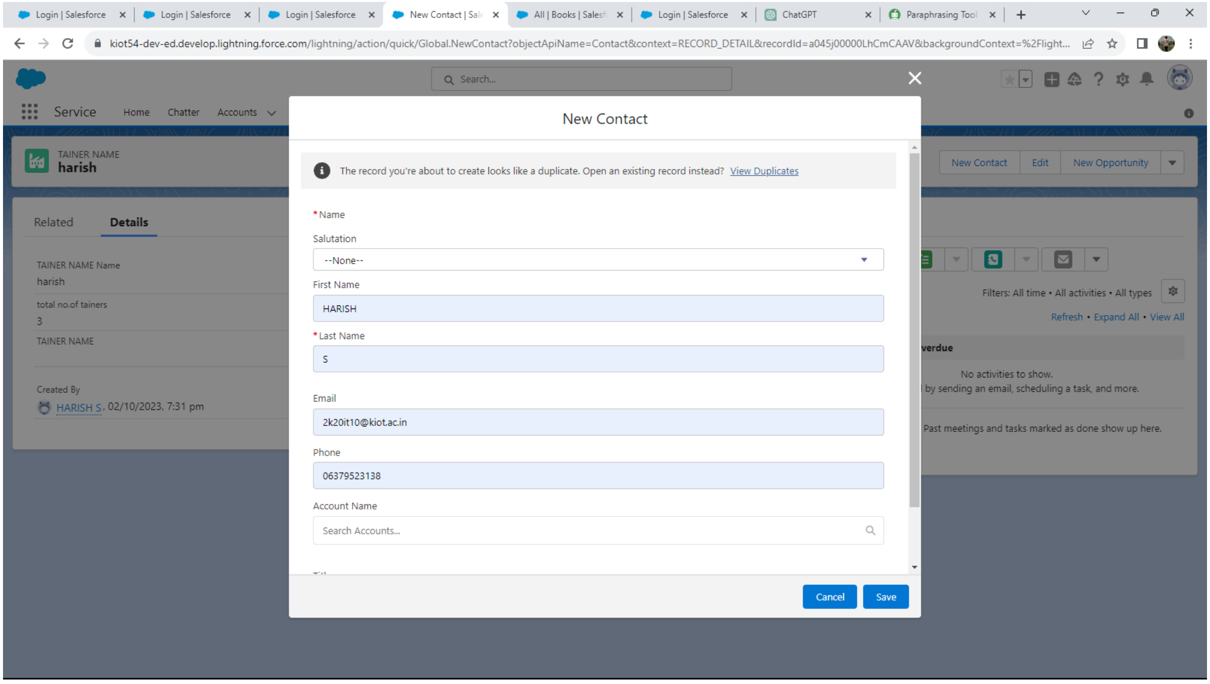
Object Manager
SETUP > OBJECT MANAGER
TAINER NAME
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Triggers
Flow Triggers
TAINER NAME
New Relationship
Help for this Page
Step 4. Establish field-level security for reference field
Step 4 of 6
Previous
Next
Cancel
Field Label
TAINER NAME
Data Type
Master-Detail
Field Name
TAINER_NAME
Description
These are the field-level settings for a Master-Detail relationship. They cannot be changed.
Field-Level Security for Profile
Visible
Read-Only
Analytics Cloud Integration User
Analytics Cloud Security User
Authenticated Website
Authenticated Website
Contract Manager
Cross Org Data Proxy User
Custom: Marketing Profile
Custom: Sales Profile
Custom: Support Profile
Customer Community Login User
Customer Community Plus Login User
Customer Community Plus User


SETUP > OBJECT MANAGER
TAINER NAME
TAINER NAME
New Relationship
Help for this Page
Step 5. Add reference field to Page Layouts
Step 5 of 6
Previous
Next
Cancel
Field Label TAINER NAME
Data Type Master-Detail
Field Name TAINER_NAME
Description
These are the page layouts that will include this field. Because this is a Master-Detail relationship, the field is required.
Add Field
Page Layout Name
TAINER NAME Layout


SETUP > OBJECT MANAGER
TAINER NAME
TAINER NAME
New Relationship
Help for this Page
Step 6. Add custom related lists
Step 6 of 6
Previous
Save & New
Save
Cancel
Field Label TAINER NAME
Data Type Master-Detail
Field Name TAINER_NAME
Description
Specify the title that the related list will have in all of the layouts associated with the parent.
Related List Label TAINER NAMES
These are the page layouts that will include this field. Because this is a Master-Detail relationship, the field is required.
Add Related List
Page Layout Name
tainer Layout
Append related list to users' existing personal customizations



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."

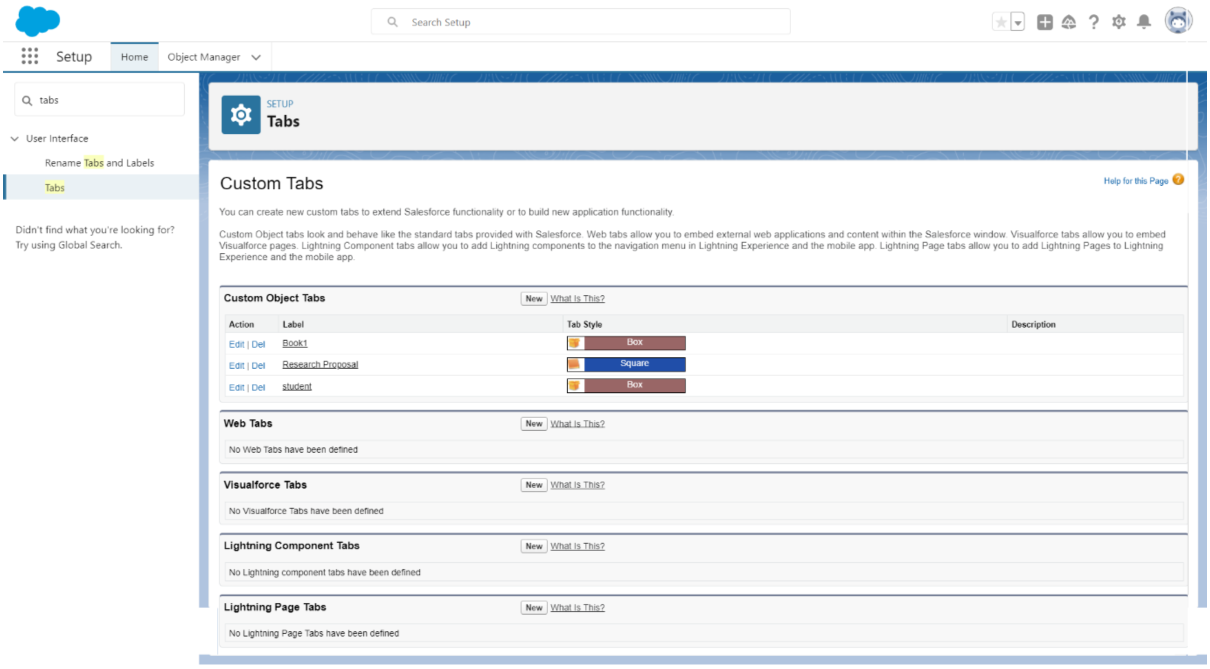
3) Pick the "Child Relationship Name" (made in step 2); an example might be "Child_Object__r"

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".


Search Setup
Setup
Home
Object Manager
tabs
User Interface
Rename Tabs and Labels
Tabs
Didn't find what you're looking for? Try using Global Search.
SETUP
Tabs
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
No Web Tabs have been defined
Visualforce Tabs
No Visualforce Tabs have been defined
Lightning Component Tabs
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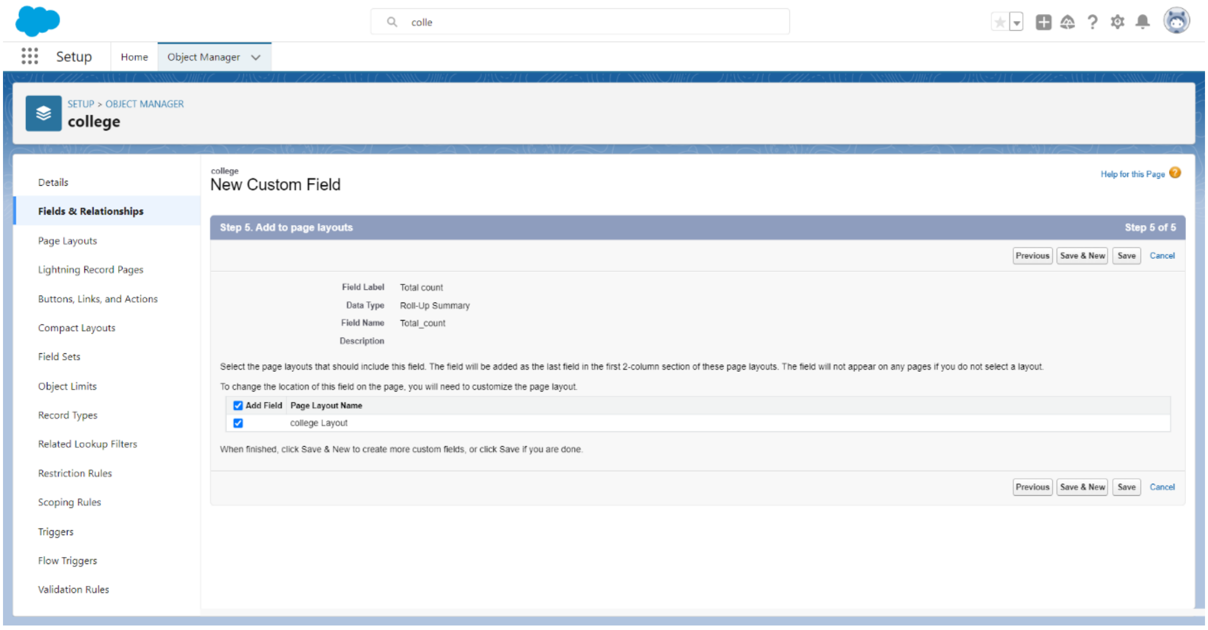
Lightning Page Tabs
No Lightning Page Tabs have been defined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Setup
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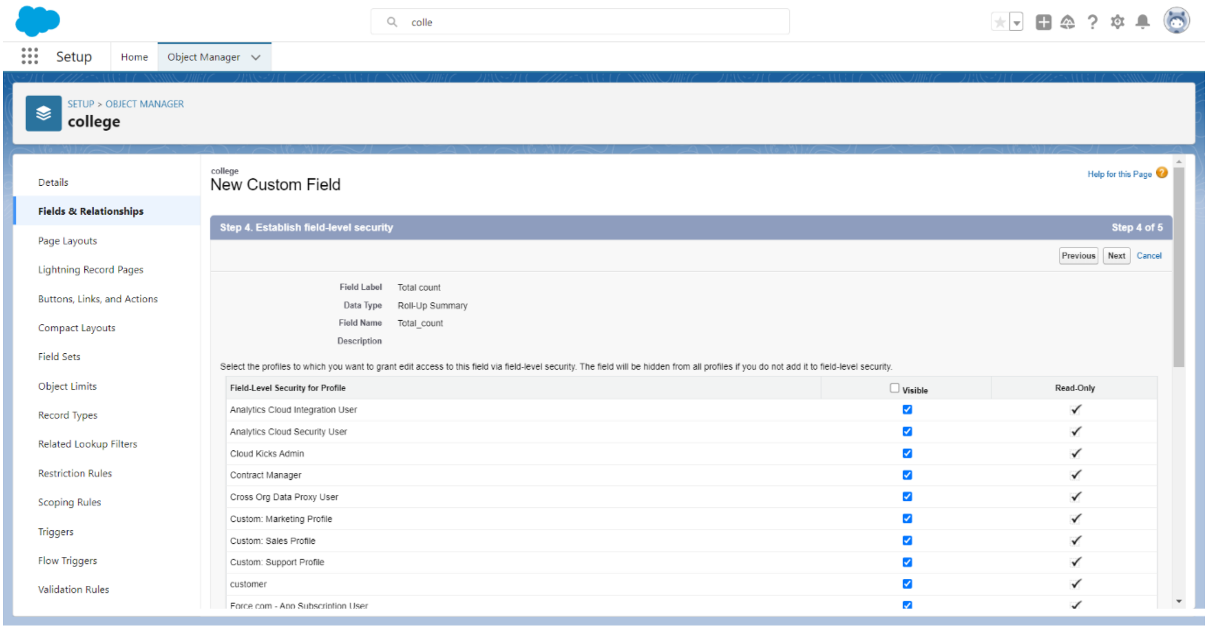
Object Manager
SETUP > OBJECT MANAGER
college
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Triggers
Flow Triggers
Validation Rules
college
New 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.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Fields & Relationships
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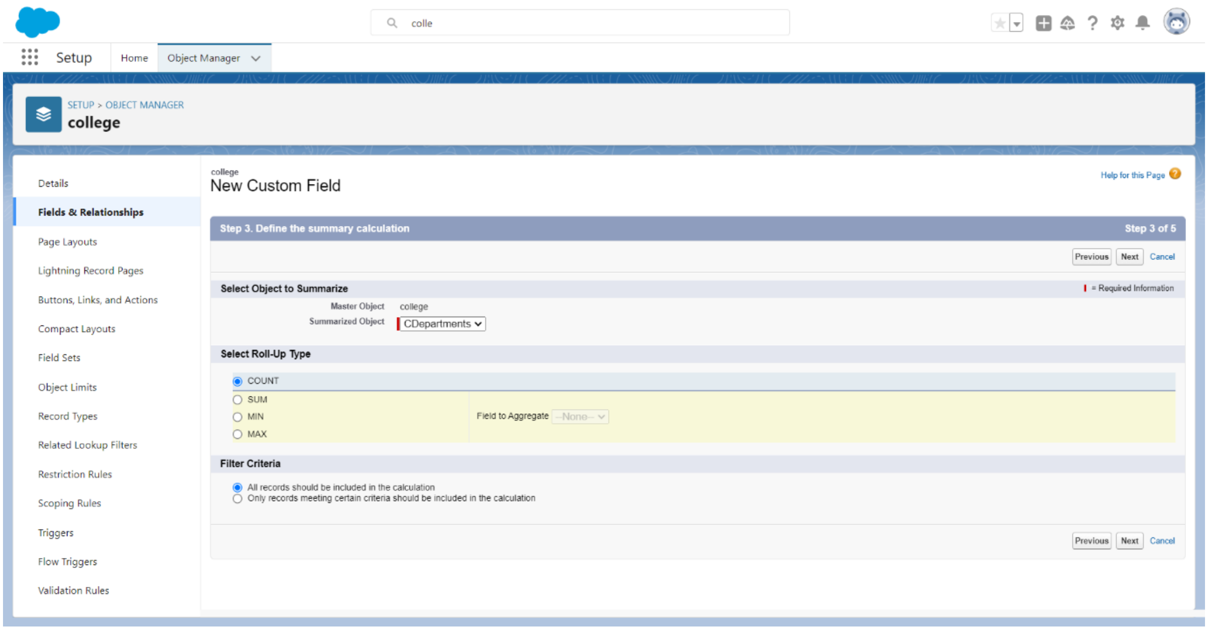
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Triggers
Flow Triggers
Validation Rules
college
New Custom Field
Help for this Page
Step 4. Establish field-level security
Step 4 of 5
Previous
Next
Cancel
Field Label 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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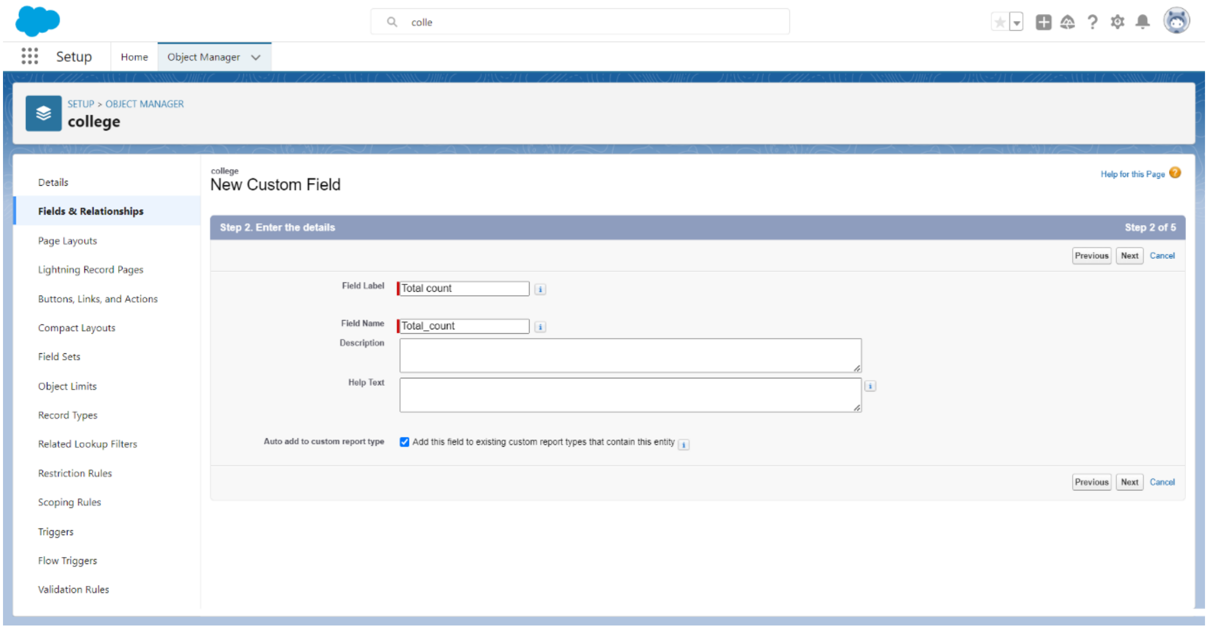
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Triggers
Flow Triggers
Validation Rules
college
New Custom Field
Help for this Page
Step 3. Define the summary calculation
Step 3 of 5
Previous
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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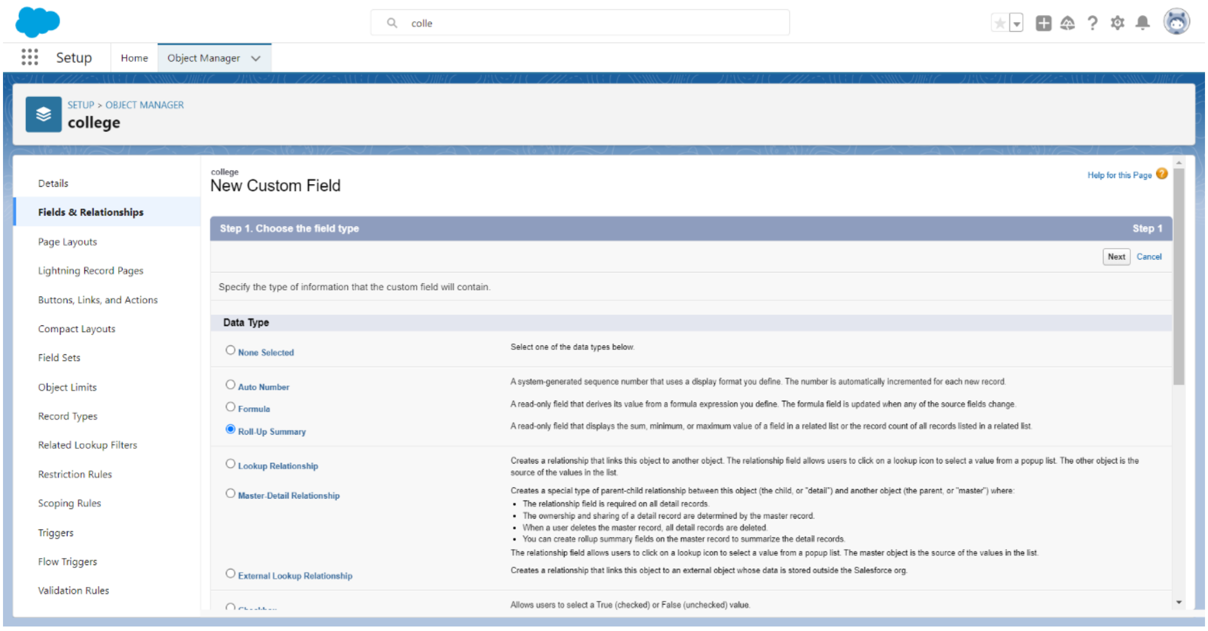
Related Lookup Filters
Restriction Rules
Scoping Rules
Triggers
Flow Triggers
Validation Rules
college
New Custom Field
Help for this Page
Step 2. Enter the details
Step 2 of 5
Previous
Next
Cancel
Field Label
Total count
Field Name
Total_count
Description
Help Text
Auto add to custom report type
Add this field to existing custom report types that contain this entity
Previous
Next
Cancel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SETUP > OBJECT MANAGER
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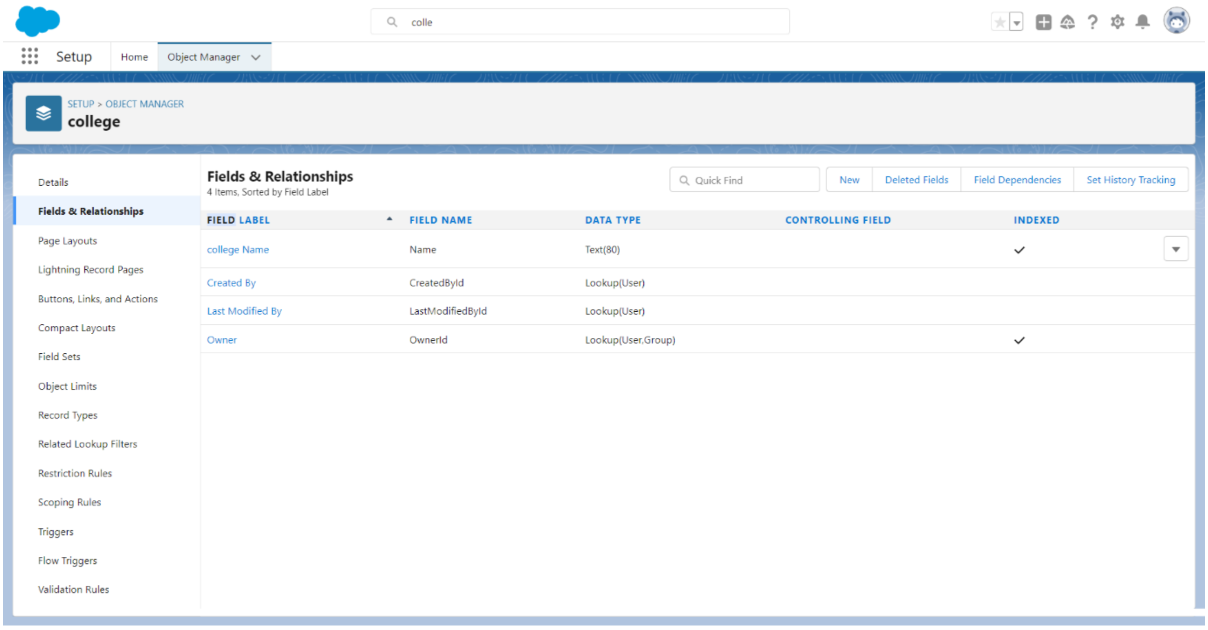
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Triggers
Flow Triggers
Validation Rules
college
New Custom Field
Help for this Page
Step 1. Choose the field type
Step 1
Next
Cancel
Specify the type of information that the custom field will contain.
Data Type
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.
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.
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.
External Lookup Relationship
Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.
Allows users to select a True (checked) or False (unchecked) value.



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.

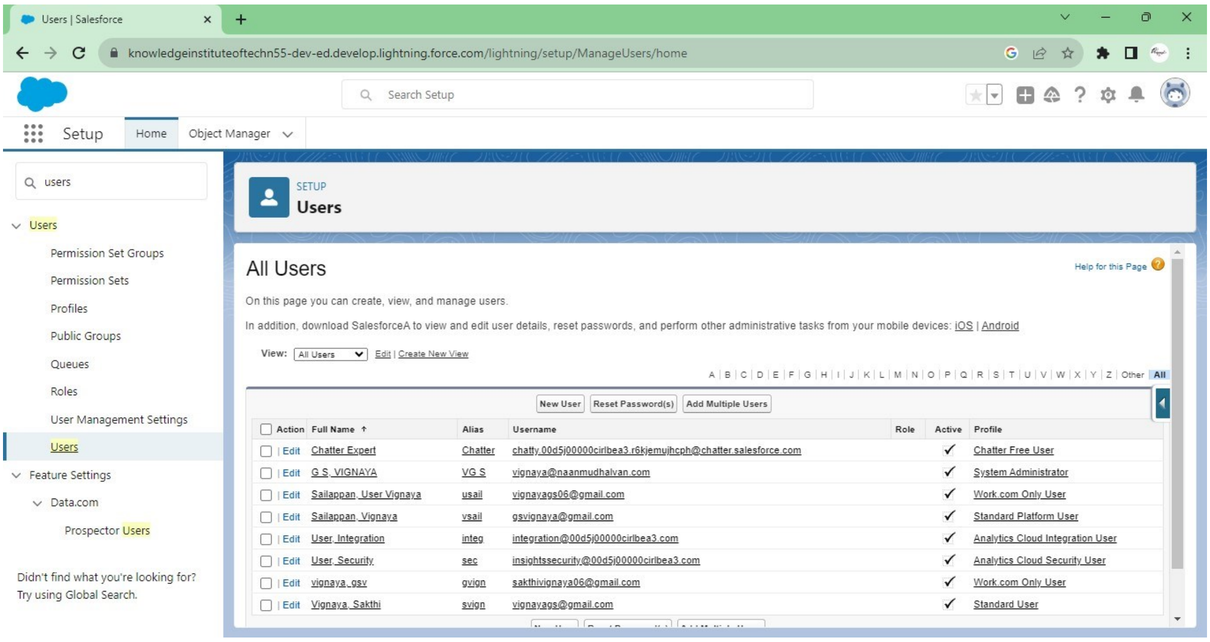
Assign a Password:

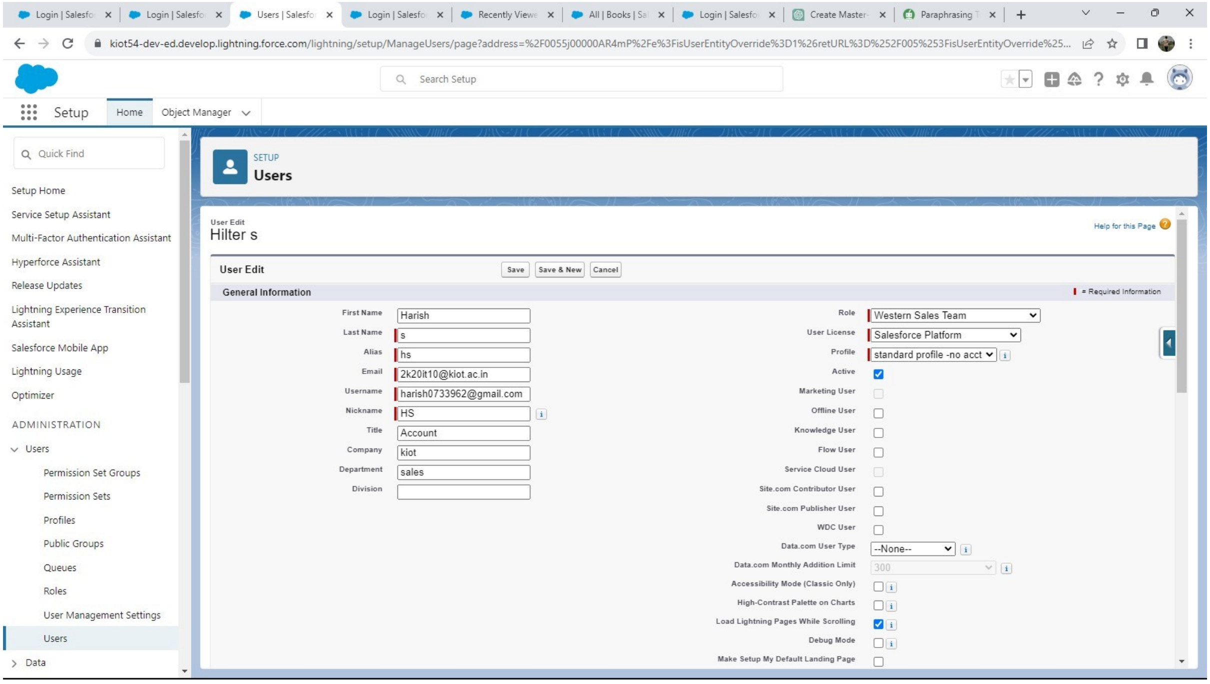
- After saving the user, you'll be prompted to assign a temporary password.

- 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.





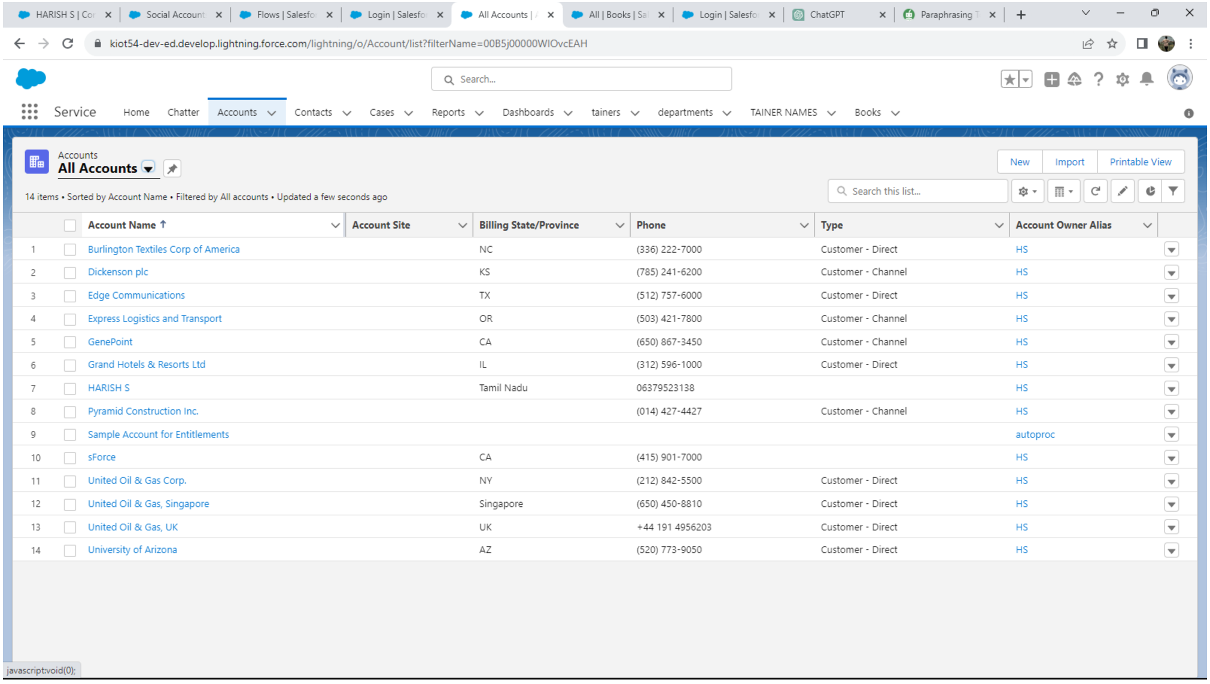
There are four ways you can manage record-level access. They are presented in ascending order of access. The most stringent degree of data protection is achieved using the organization-wide settings, and as needed, access is then granted to specific users using the various record-level security measures.

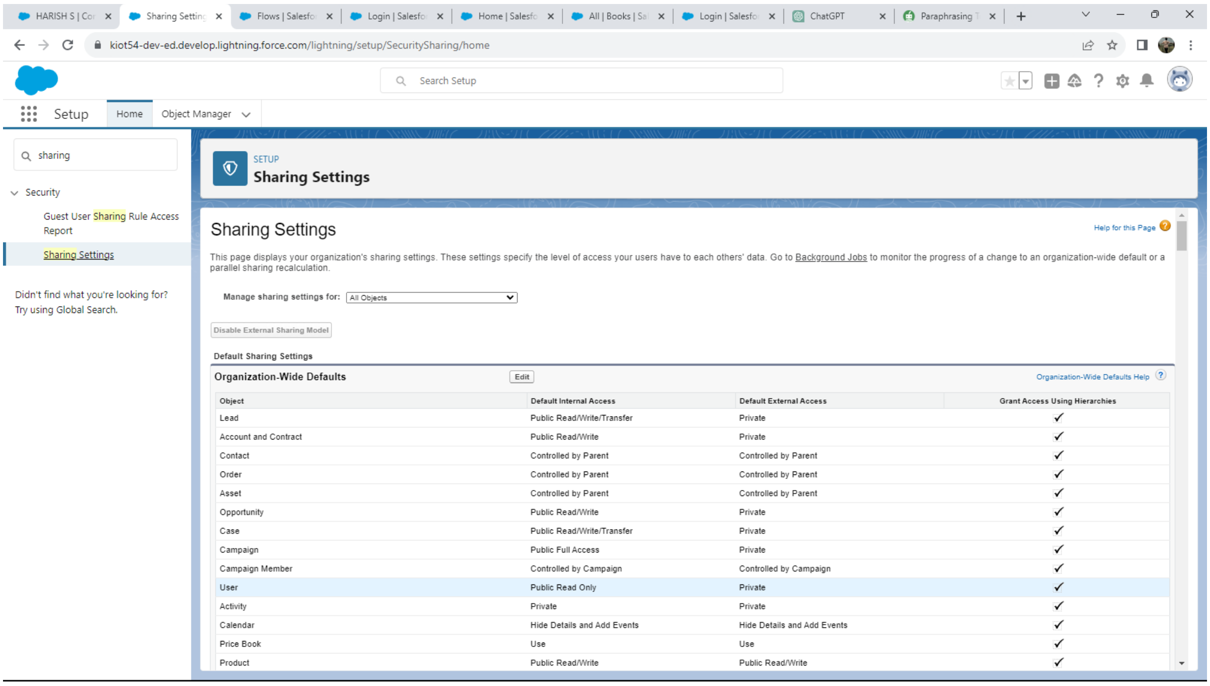
The default level of access that users have to one another's records is defined by organization-wide defaults.

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.

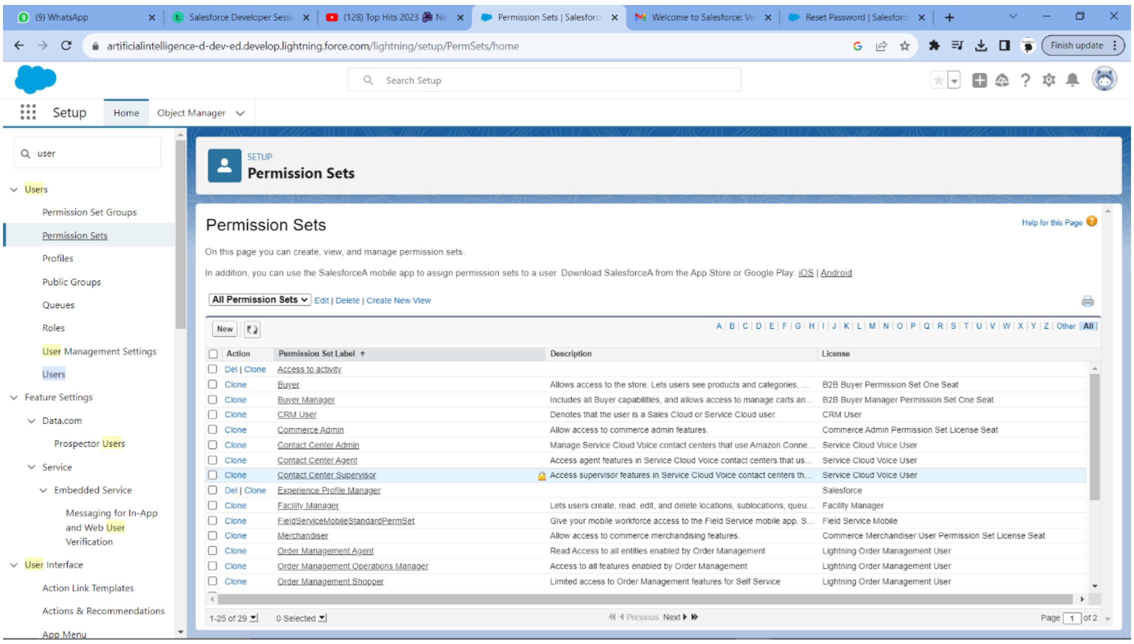
Ownership:

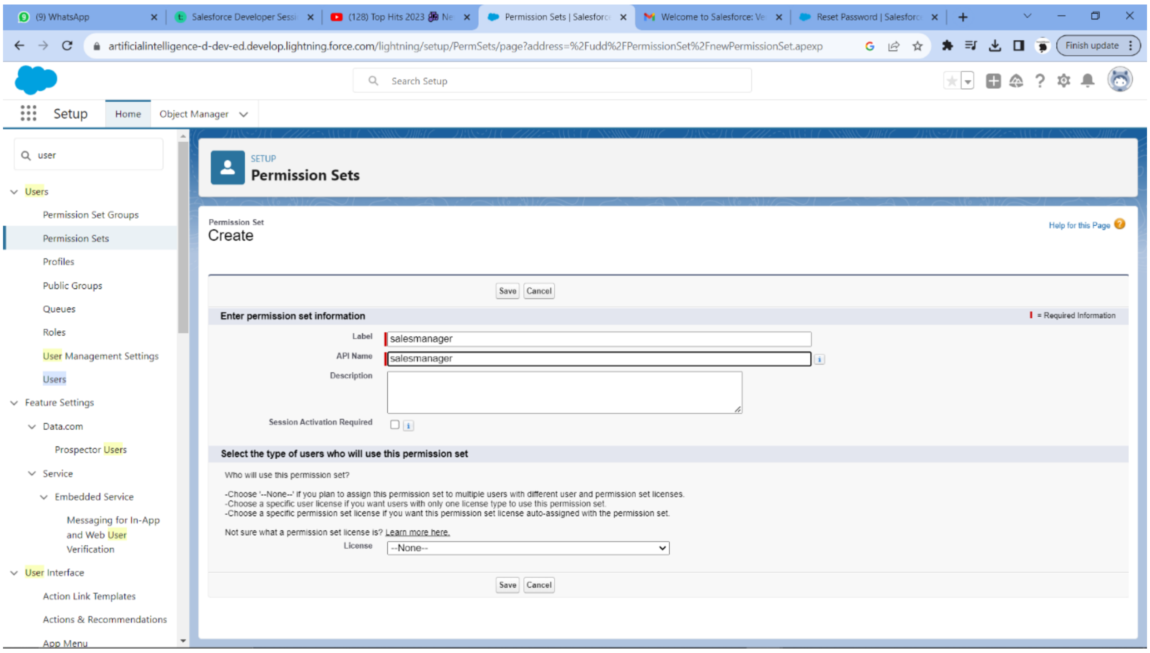
• Ensure that the Account records are owned by the respective users, with User A owning their records and User B owning their records.

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.





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Search Setup
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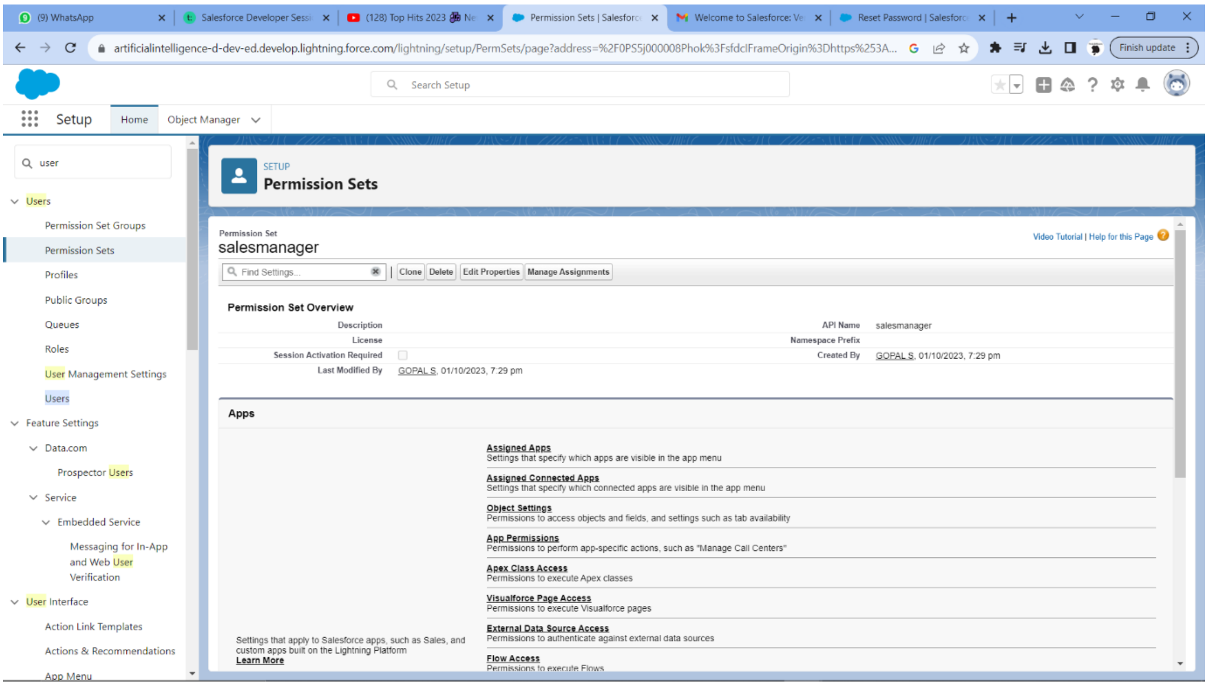
Object Manager
user
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Feature Settings
Data.com
Prospector Users
Service
Embedded Service
Messaging for In-App and Web User Verification
User Interface
Action Link Templates
Actions & Recommendations
App Menu
SETUP
Permission Sets
Permission Set
Create
Help for this Page
Save
Cancel
Enter permission set information
= Required Information
Label
salesmanager
API Name
salesmanager
Description
Session Activation Required
Select the type of users who will use this permission set
Who will use this permission set?
-Choose '--None--' if you plan to assign this permission set to multiple users with different user and permission set licenses.
-Choose a specific user license if you want users with only one license type to use this permission set.
-Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.
Not sure what a permission set license is? Learn more here.
License
--None--
Save
Cancel



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Search Setup
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Permission Set Groups
Permission Sets
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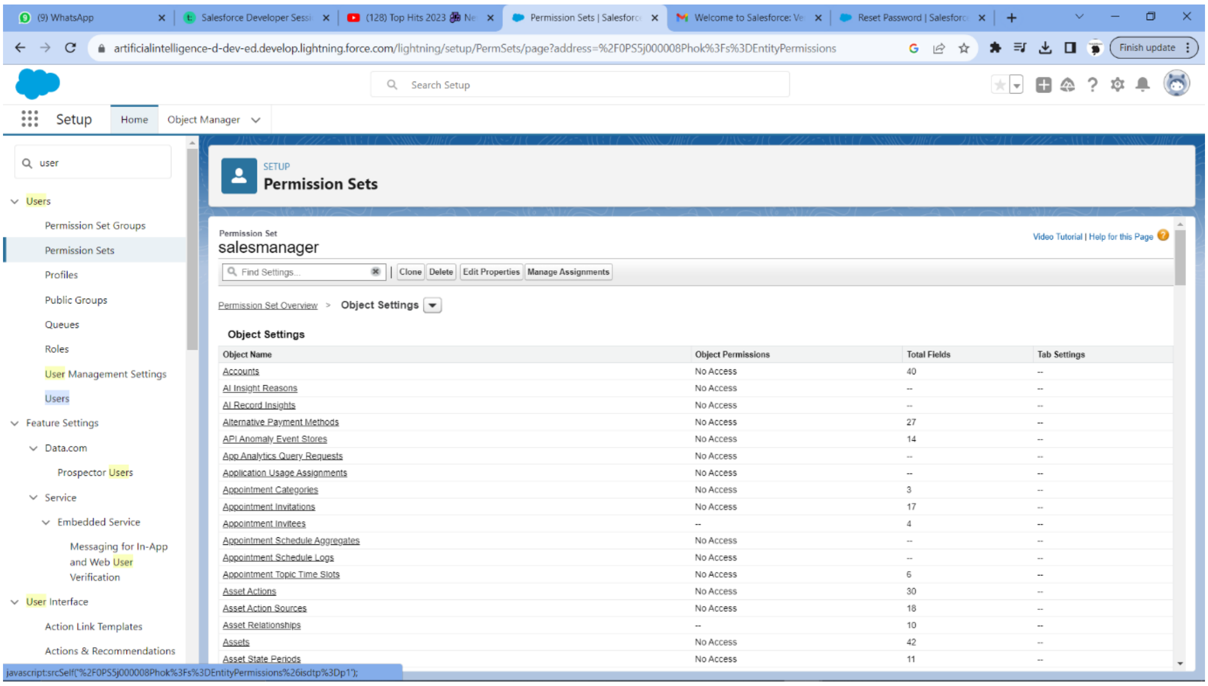
Queues
Roles
User Management Settings
Users
Feature Settings
Data.com
Prospector Users
Service
Embedded Service
Messaging for In-App and Web User Verification
User Interface
Action Link Templates
Actions & Recommendations
App Menu
SETUP
Permission Sets
Permission Set
salesmanager
Video Tutorial | Help for this Page
Find Settings...
Clone
Delete
Edit Properties
Manage Assignments
Permission Set Overview
Description
License
Session Activation Required
Last Modified By GOPAL S, 01/10/2023, 7:29 pm
API Name salesmanager
Namespace Prefix
Created By GOPAL S, 01/10/2023, 7:29 pm
Apps
Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform
Learn More
Assigned Apps
Settings that specify which apps are visible in the app menu
Assigned Connected Apps
Settings that specify which connected apps are visible in the app menu
Object Settings
Permissions to access objects and fields, and settings such as tab availability
App Permissions
Permissions to perform app-specific actions, such as "Manage Call Centers"
Apex Class Access
Permissions to execute Apex classes
Visualforce Page Access
Permissions to execute Visualforce pages
External Data Source Access
Permissions to authenticate against external data sources
Flow Access
Permissions to execute Flows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Profiles
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Roles
User Management Settings
Users
Feature Settings
Data.com
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Messaging for In-App and Web User Verification
User Interface
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Actions & Recommendations
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Permission Sets
Permission Set
salesmanager
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Clone
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Edit Properties
Manage Assignments
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Object Permissions
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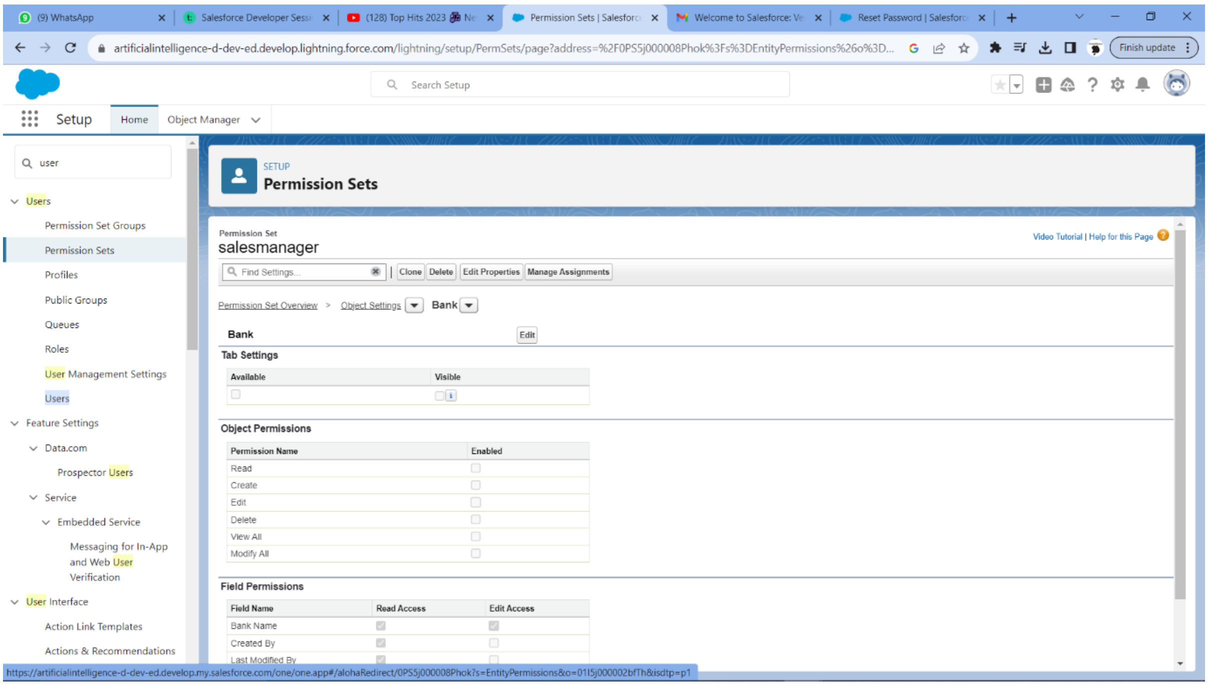
javascript:srcSelf('%2F0PS5j000008Phok%3Fs%3DEntityPermissions%26isdtp%3Dp1');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Permission Name
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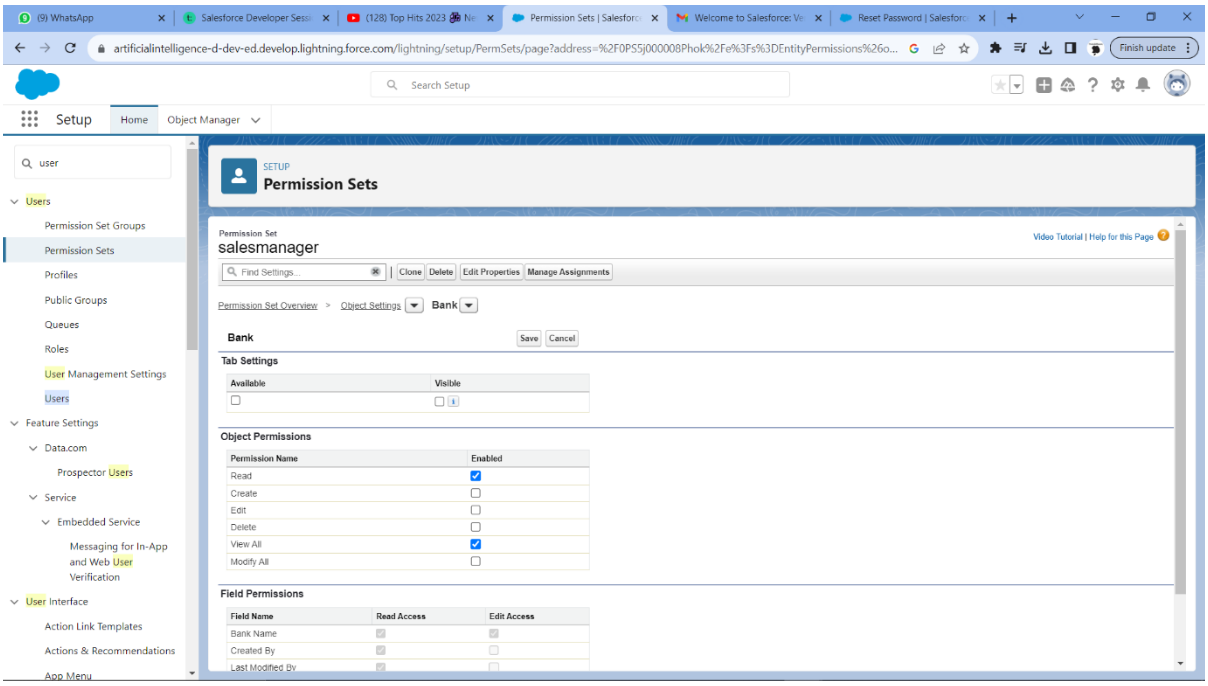
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Clone
Delete
Edit Properties
Manage Assignments
Permission Set Overview > Object Settings
Bank
Save
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Tab Settings
Available
Visible
Object Permissions
Permission Name
Enabled
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Edit
Delete
View All
Modify All
Field Permissions
Field Name
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Edit Access
Bank Name
Created By
Users
Permission Set Groups
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Prospector Users
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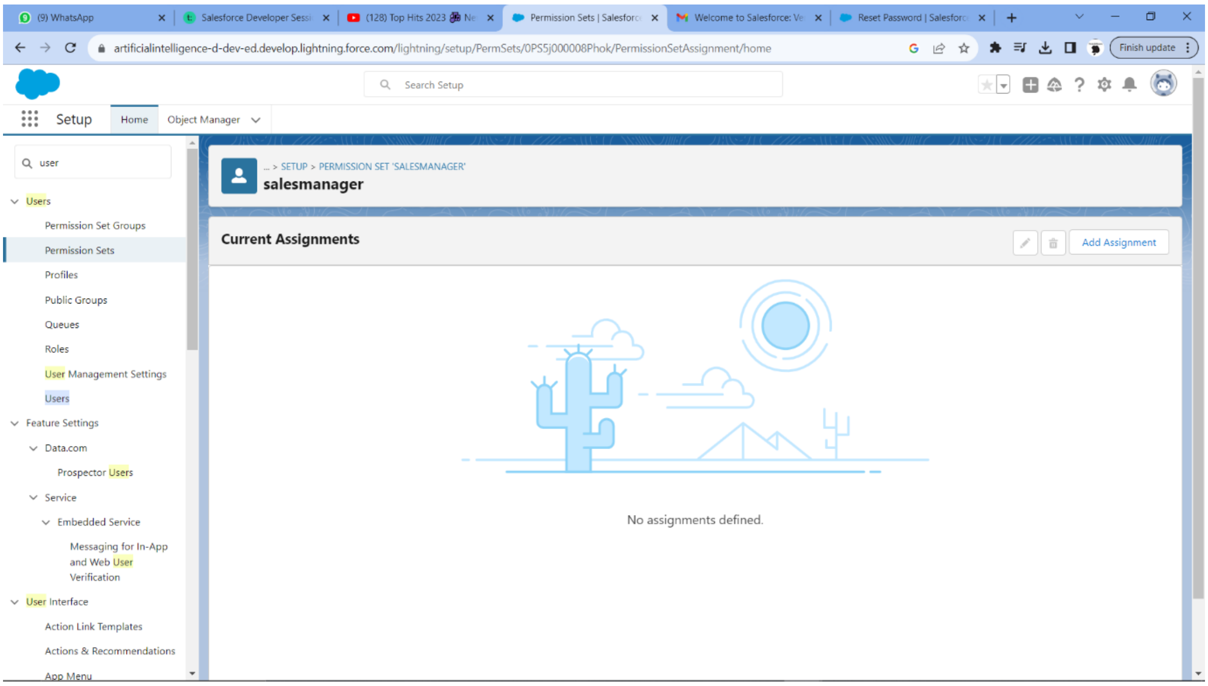
Setup
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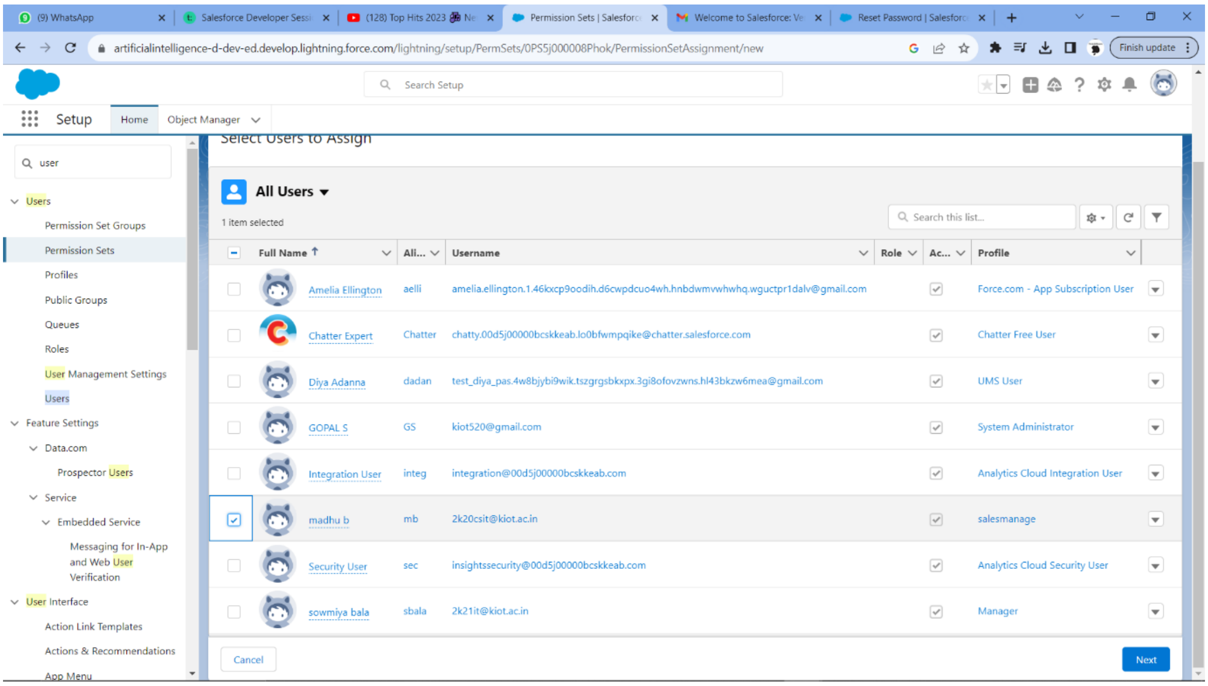
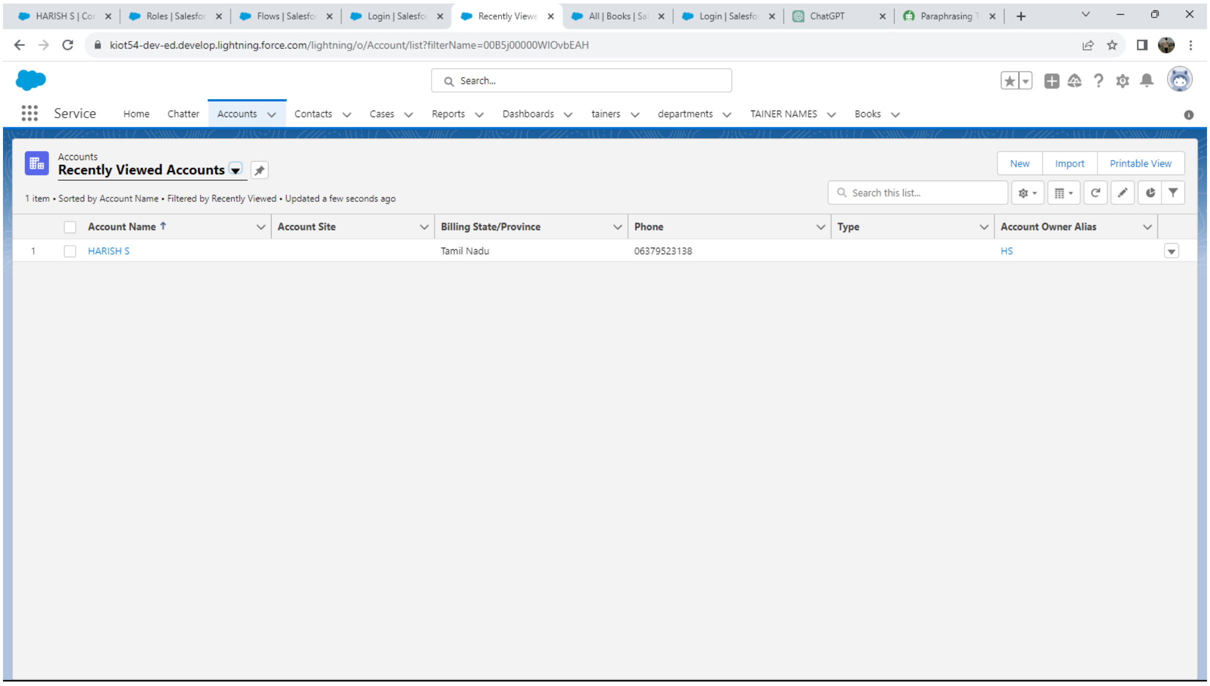
Object Manager
... > SETUP > PERMISSION SET 'SALESMANAGER'
salesmanager
Current Assignments
Add Assignment
No assignments defined.
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Feature Settings
Data.com
Prospector Users
Service
Embedded Service
Messaging for In-App and Web User Verification
User Interface
Action Link Templates
Actions & Recommendations





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.

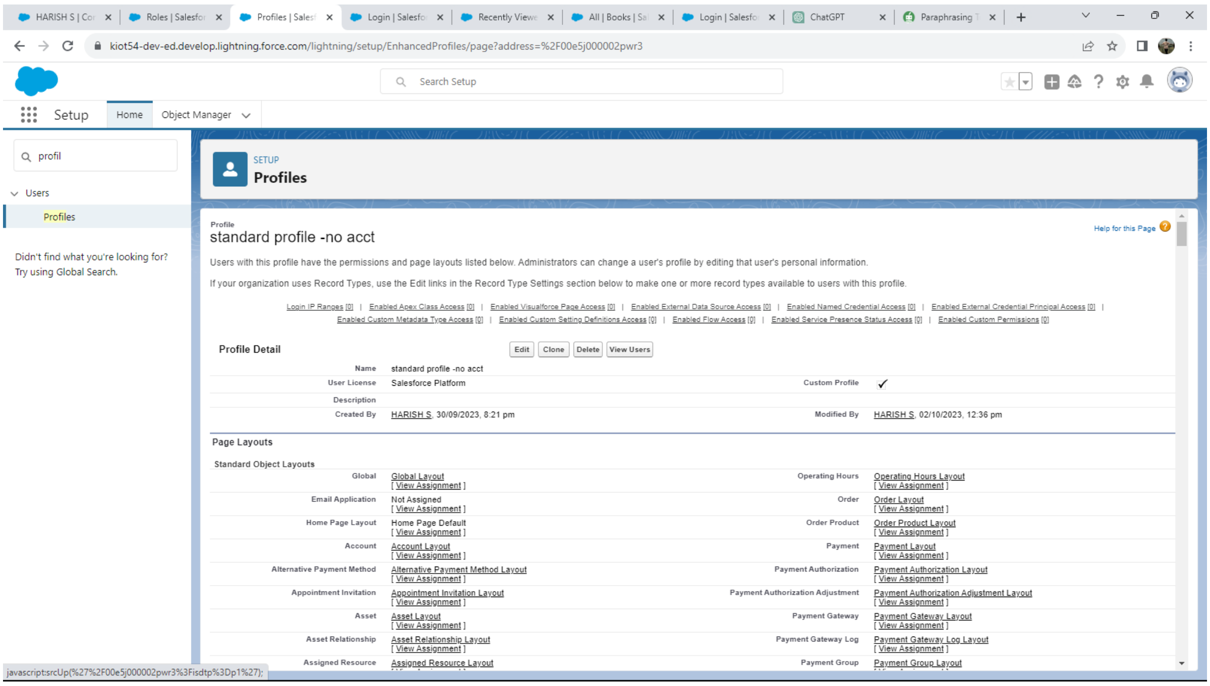
4.Remove Delete Access from Profile:

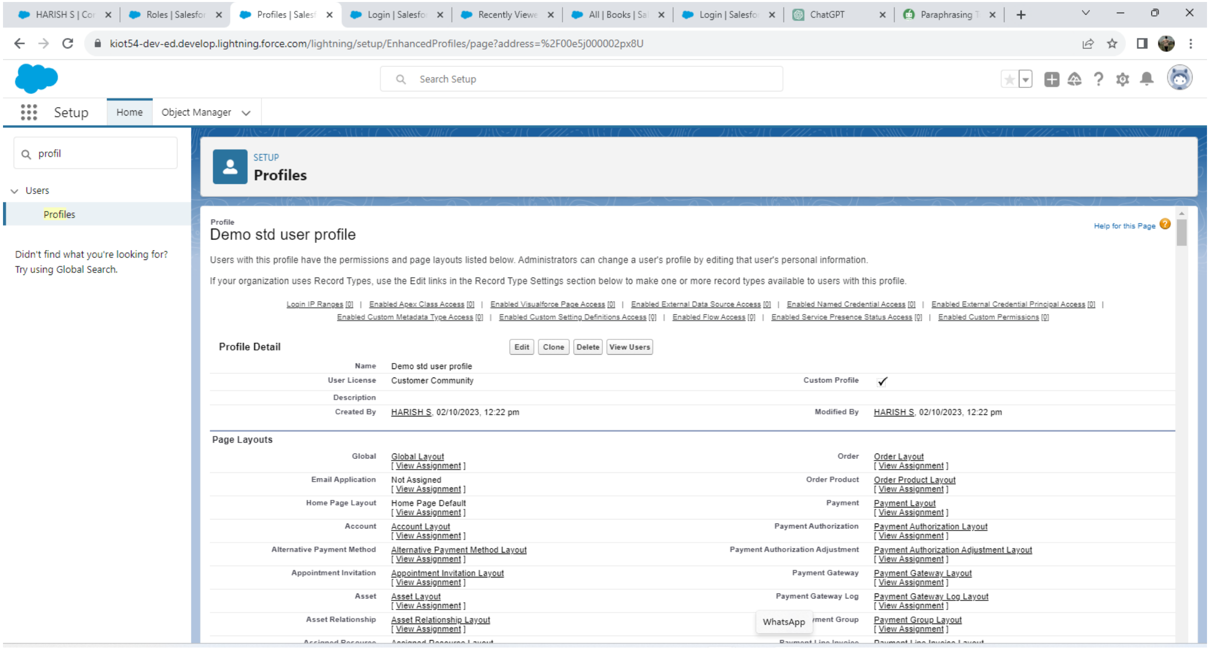
- Go to the profile assigned to both users.

- 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.

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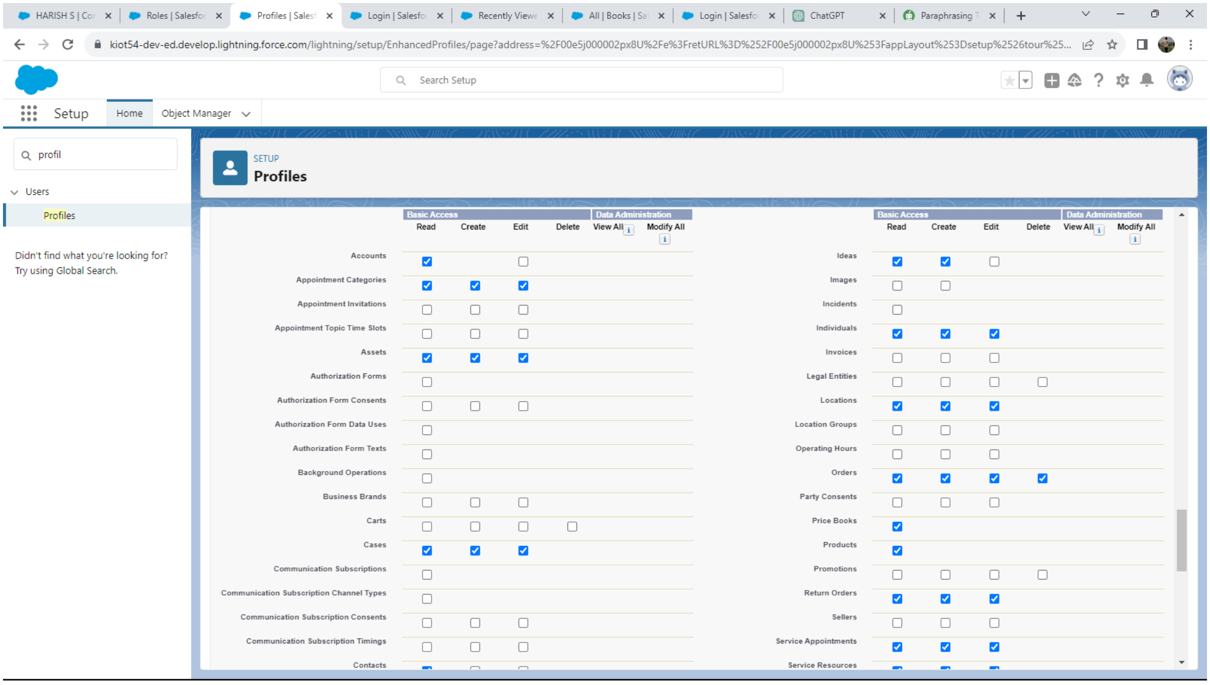
Search Setup
Setup
Home
Object Manager
profil
Users
Profiles
Didn't find what you're looking for?
Try using Global Search.
SETUP
Profiles
Profile
Demo std user profile
Help for this Page
Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile 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
Demo std user profile
User License
Customer Community
Custom Profile
Description
Created By
HARISH S, 02/10/2023, 12:22 pm
Modified By
HARISH S, 02/10/2023, 12:22 pm
Page Layouts
Global
Global Layout
Order
Order Layout
Email Application
Not Assigned
Order Product
Order Product Layout
Home Page Layout
Home Page Default
Payment
Payment Layout
Account
Account Layout
Payment Authorization
Payment Authorization Layout
Alternative Payment Method
Alternative Payment Method Layout
Payment Authorization Adjustment
Payment Authorization Adjustment Layout
Appointment Invitation
Appointment Invitation Layout
Payment Gateway
Payment Gateway Layout
Asset
Asset Layout
Payment Gateway Log
Payment Gateway Log Layout
Asset Relationship
Asset Relationship Layout
Payment Group Layout
[View Assignment]
WhatsApp


Search Setup
Setup
Home
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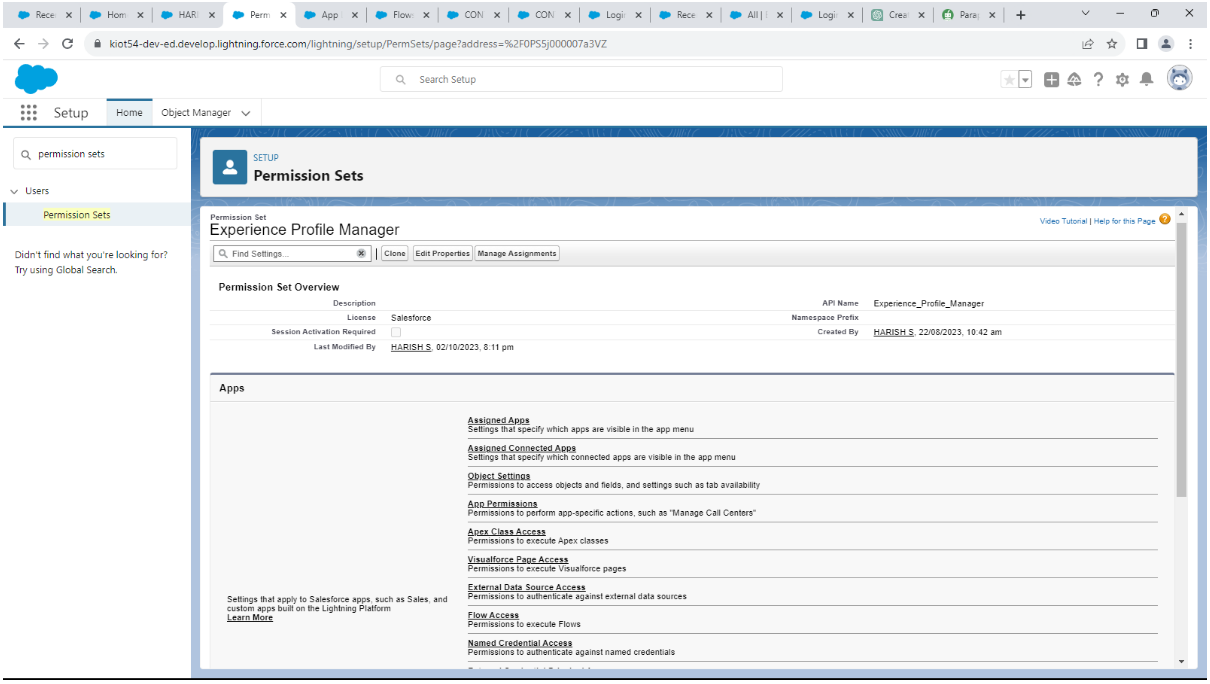
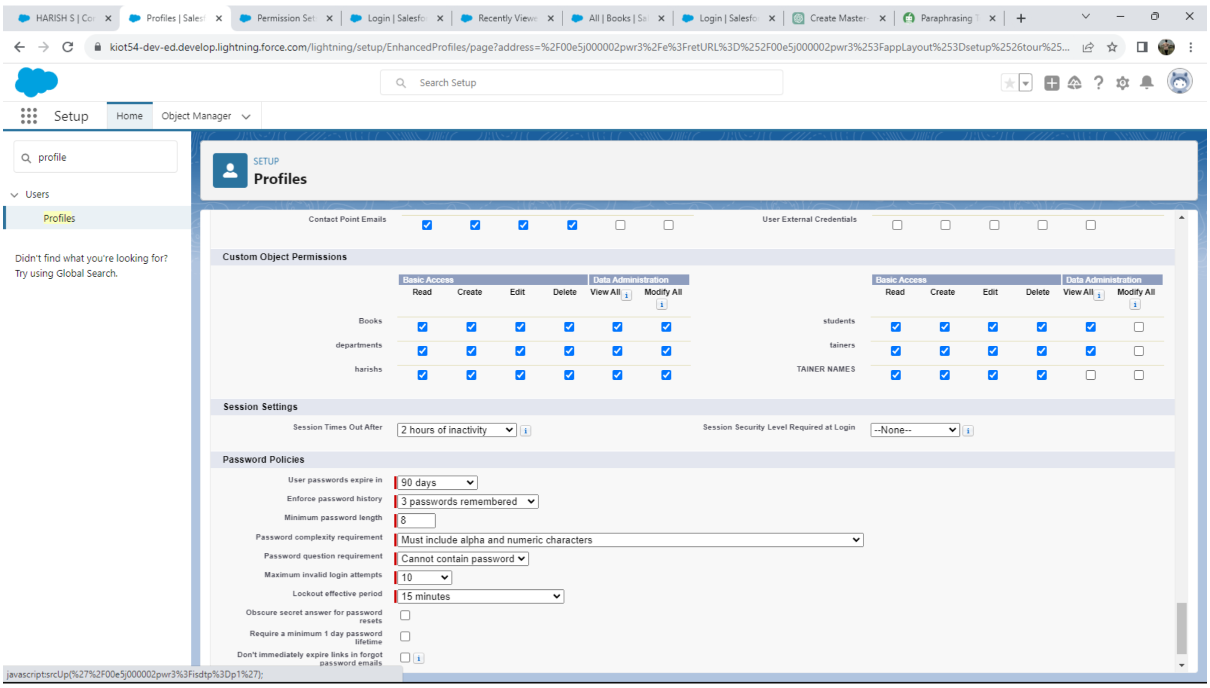
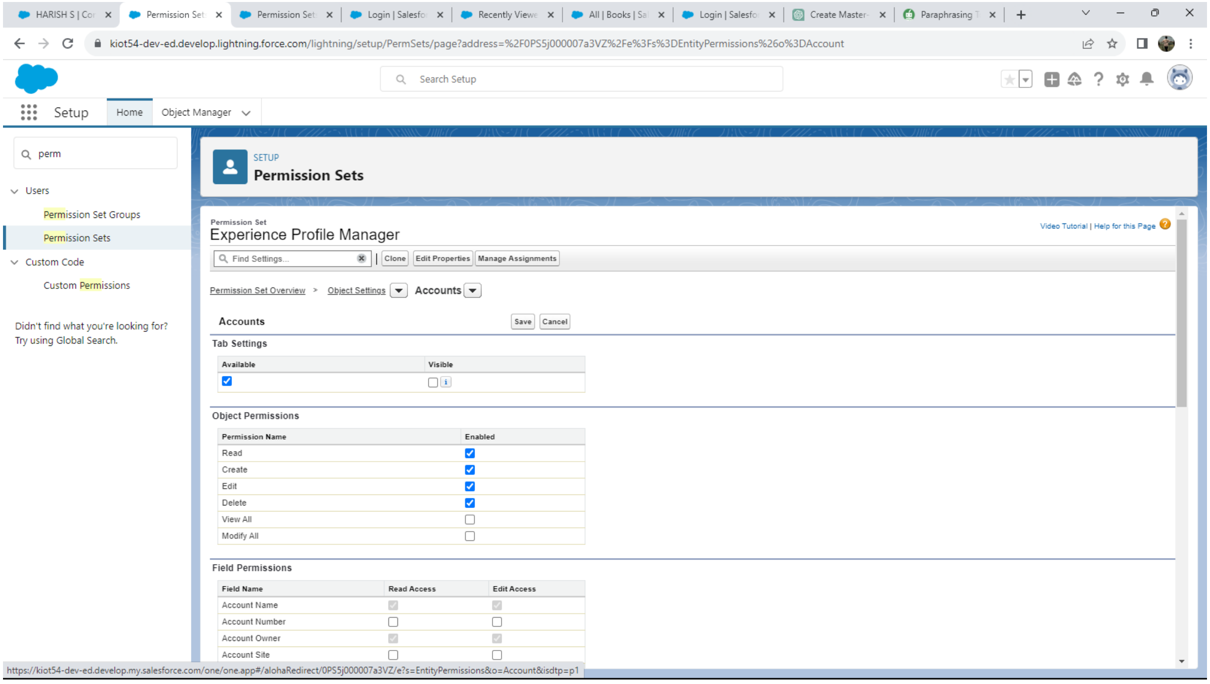
Users
Profiles
Didn't find what you're looking for?
Try using Global Search.
SETUP
Profiles
Basic Access
Data Administration
Read
Create
Edit
Delete
View All
Modify All
Accounts
Appointment Categories
Appointment Invitations
Appointment Topic Time Slots
Assets
Authorization Forms
Authorization Form Consents
Authorization Form Data Uses
Authorization Form Texts
Background Operations
Business Brands
Carts
Cases
Communication Subscriptions
Communication Subscription Channel Types
Communication Subscription Consents
Communication Subscription Timings
Contacts
Ideas
Images
Incidents
Individuals
Invoices
Legal Entities
Locations
Location Groups
Operating Hours
Orders
Party Consents
Price Books
Products
Promotions
Return Orders
Sellers
Service Appointments
Service Resources

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

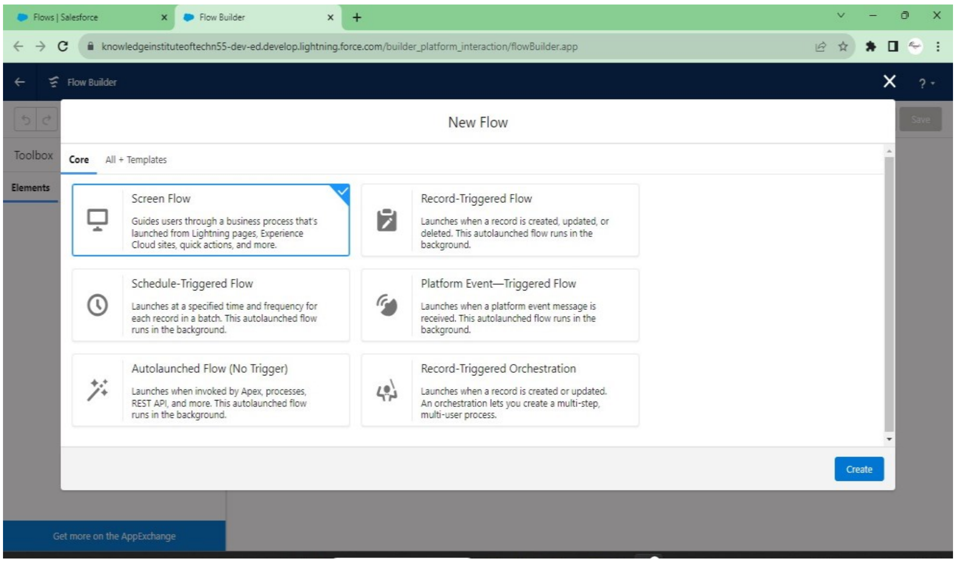
1. Open your Salesforce account and log in.

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

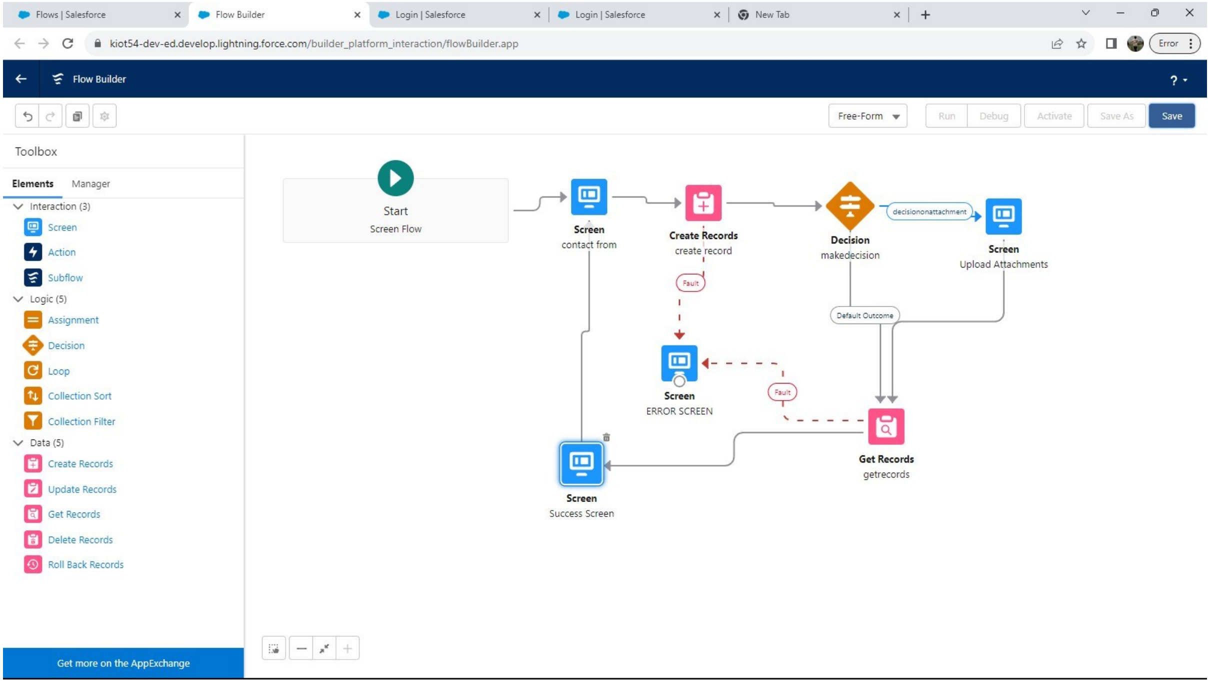
1. Move a "Screen" component into position on the canvas. This will be where your flow will begin.

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.

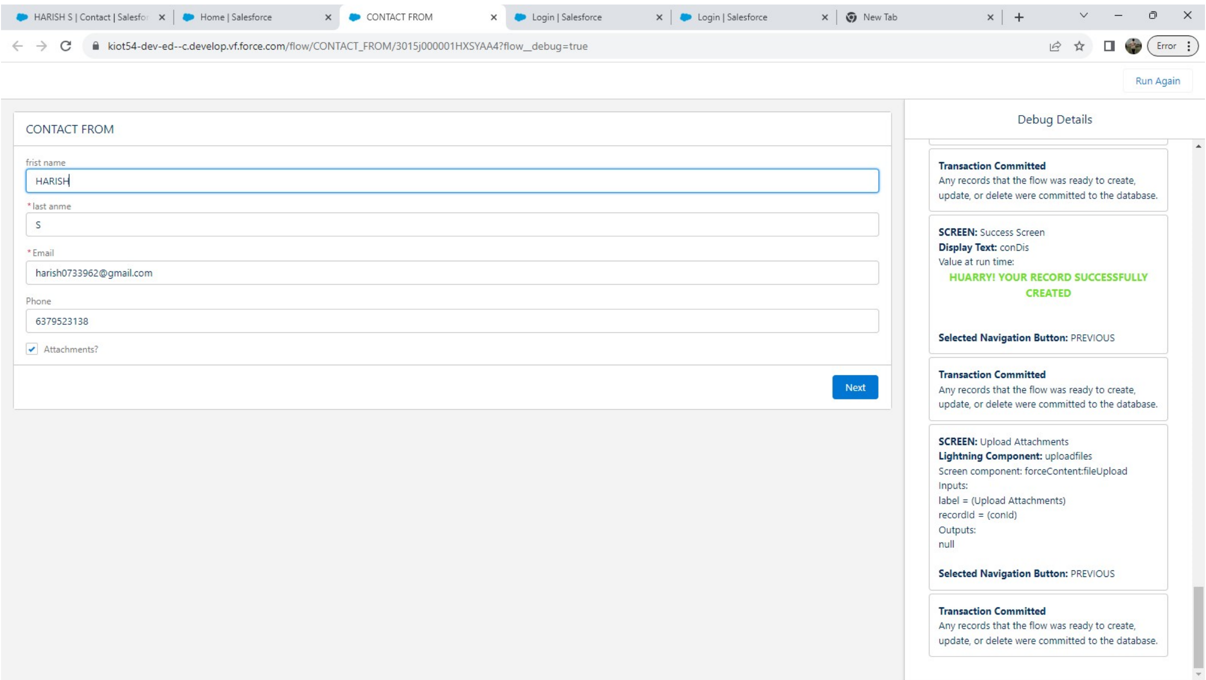
4. To allow visitors to enter survey information, drag and drop the necessary input components (such as text fields, radio buttons, and checkboxes) onto the page. These components can be found in the left-hand palette.

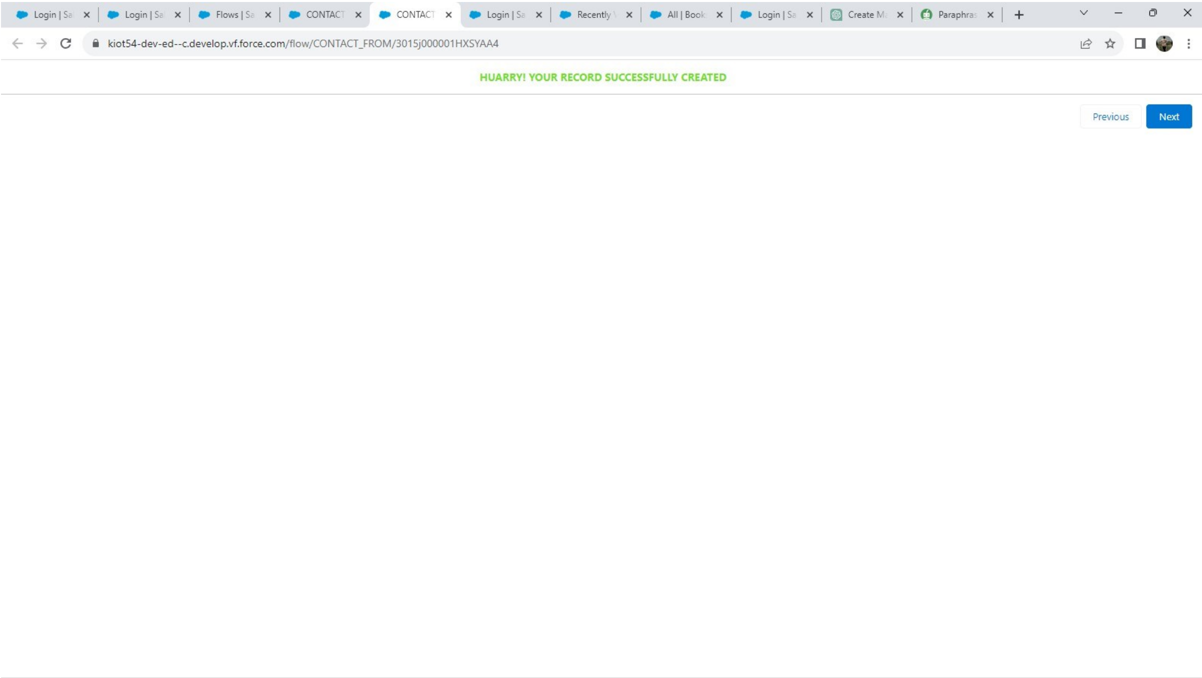
5. If required, add the proper labels, explanatory text, and validation rules to each input element.



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.

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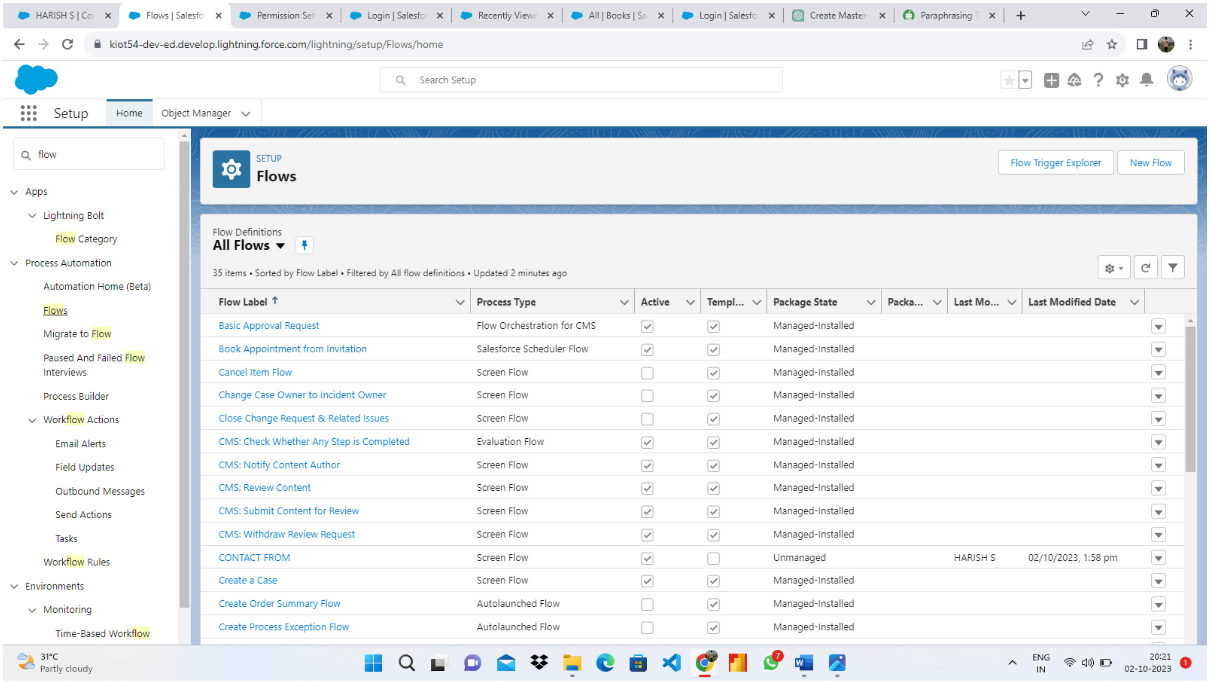
HUARRY! YOUR RECORD SUCCESSFULLY CREATED
Previous
Next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Search Setup
Setup
Home
Object Manager
flow
Apps
Lightning Bolt
Flow Category
Process Automation
Automation Home (Beta)
Flows
Migrate to Flow
Paused And Failed Flow Interviews
Process Builder
Workflow Actions
Email Alerts
Field Updates
Outbound Messages
Send Actions
Tasks
Workflow Rules
Environments
Monitoring
Time-Based Workflow
SETUP
Flows
Flow Trigger Explorer
New Flow
Flow Definitions
All Flows
35 items • Sorted by Flow Label • Filtered by All flow definitions • Updated 2 minutes ago
Flow Label
Process Type
Active
Templ...
Package State
Packa...
Last Mo...
Last Modified Date
Basic Approval Request
Flow Orchestration for CMS
Managed-Installed
Book Appointment from Invitation
Salesforce Scheduler Flow
Managed-Installed
Cancel Item Flow
Screen Flow
Managed-Installed
Change Case Owner to Incident Owner
Screen Flow
Managed-Installed
Close Change Request & Related Issues
Screen Flow
Managed-Installed
CMS: Check Whether Any Step is Completed
Evaluation Flow
Managed-Installed
CMS: Notify Content Author
Screen Flow
Managed-Installed
CMS: Review Content
Screen Flow
Managed-Installed
CMS: Submit Content for Review
Screen Flow
Managed-Installed
CMS: Withdraw Review Request
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CONTACT FROM
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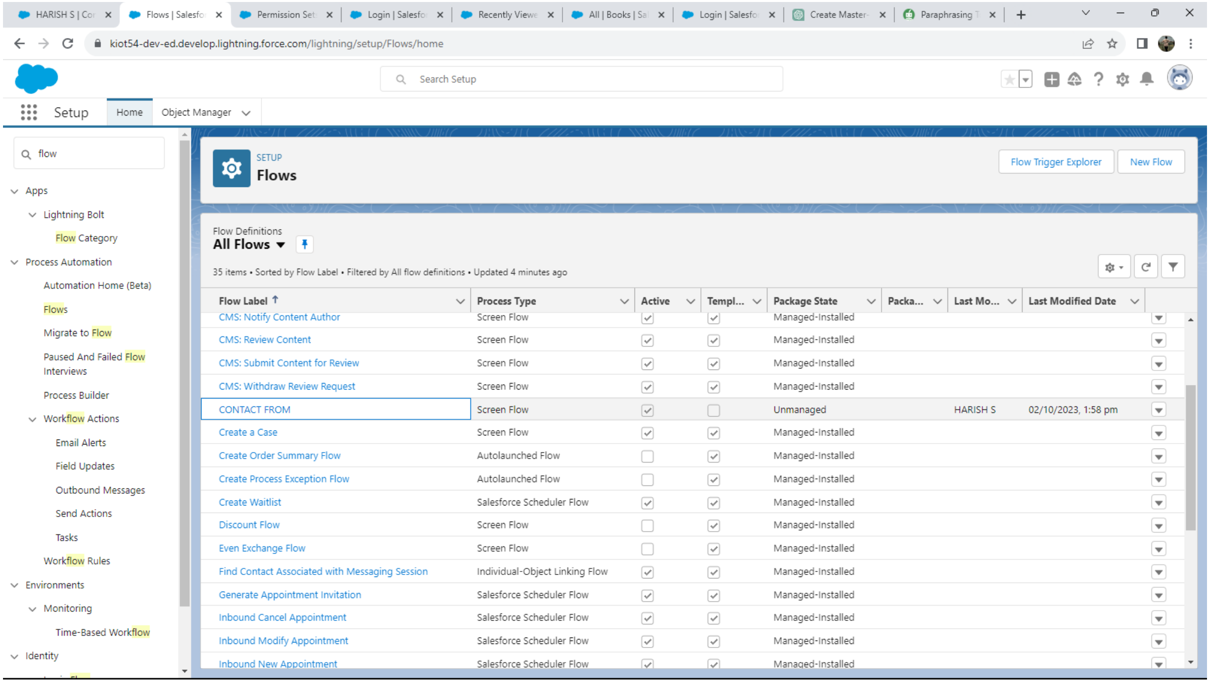
02/10/2023, 1:58 pm
Create a Case
Screen Flow
Managed-Installed
Create Order Summary Flow
Autolaunched Flow
Managed-Installed
Create Process Exception Flow
Autolaunched Flow
Managed-Installed
31°C
Partly cloudy
ENG
IN
20:21
02-10-2023



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.