

**SALESFORCE DEVELOPER
(NAAN MUDHALVAN)
ASSIGNMENT - 1**

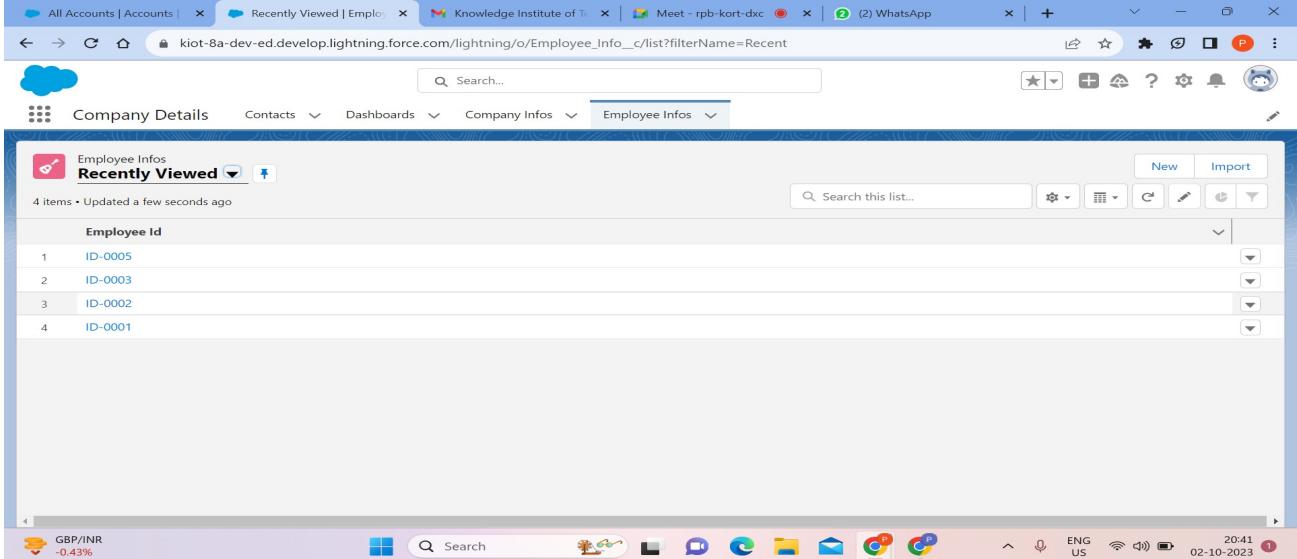
**NAME : PAVISH S
REG NO : 611220205023
BRANCH : B.TECH IT – IV YEAR**

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.

1.Create Custom Objects:

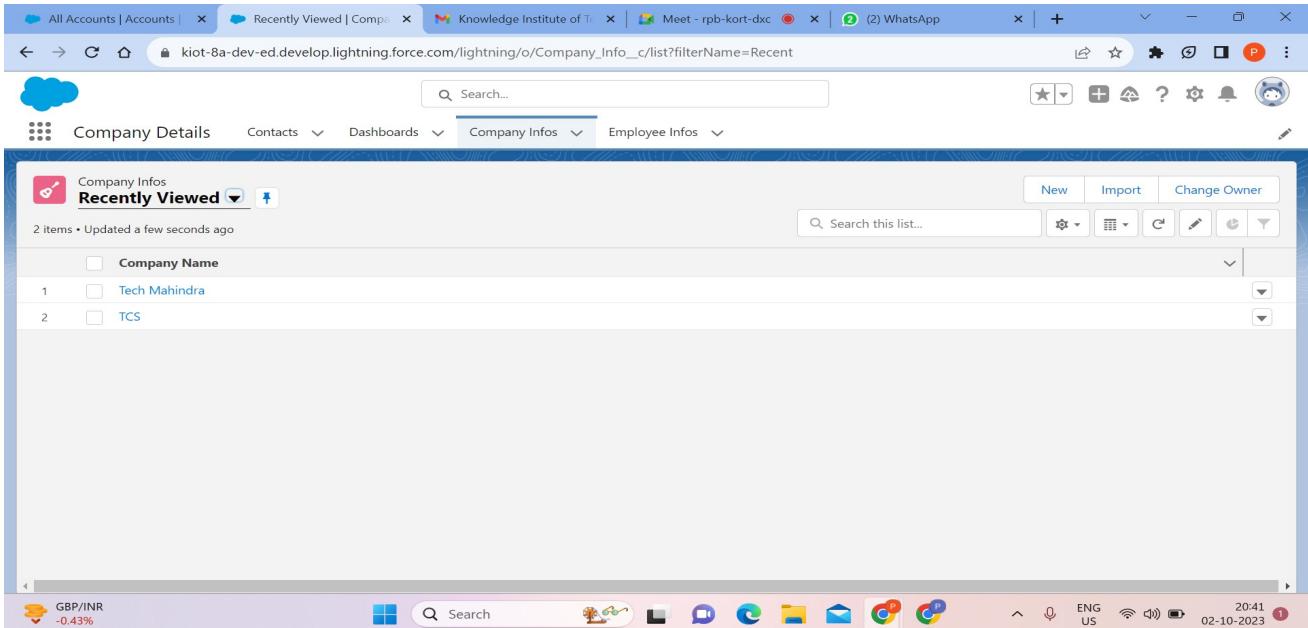
- Create the "Parent_Object__c" custom object if you haven't already.



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

- Tab Navigation:** Employee Infos
- Section:** Recently Viewed
- Data:** Employee Id
- Items:** ID-0005, ID-0003, ID-0002, ID-0001

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

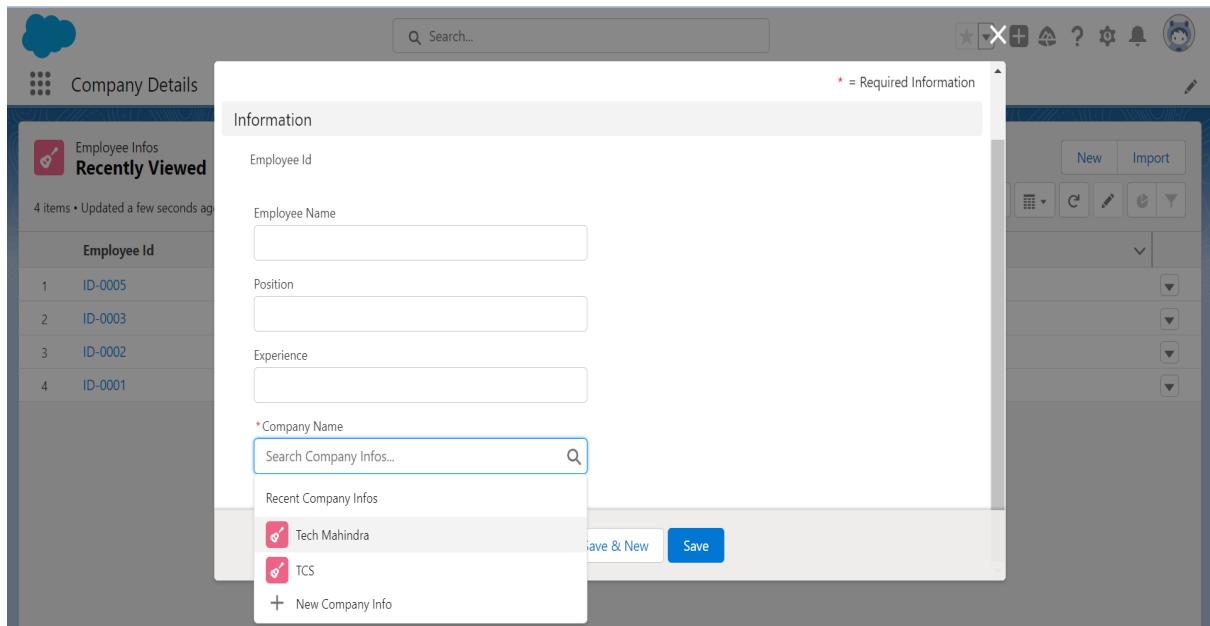


The screenshot shows the Salesforce Lightning interface with the following details:

- Tab Navigation:** Company Infos
- Section:** Recently Viewed
- Data:** Company Name
- Items:** Tech Mahindra, TCS

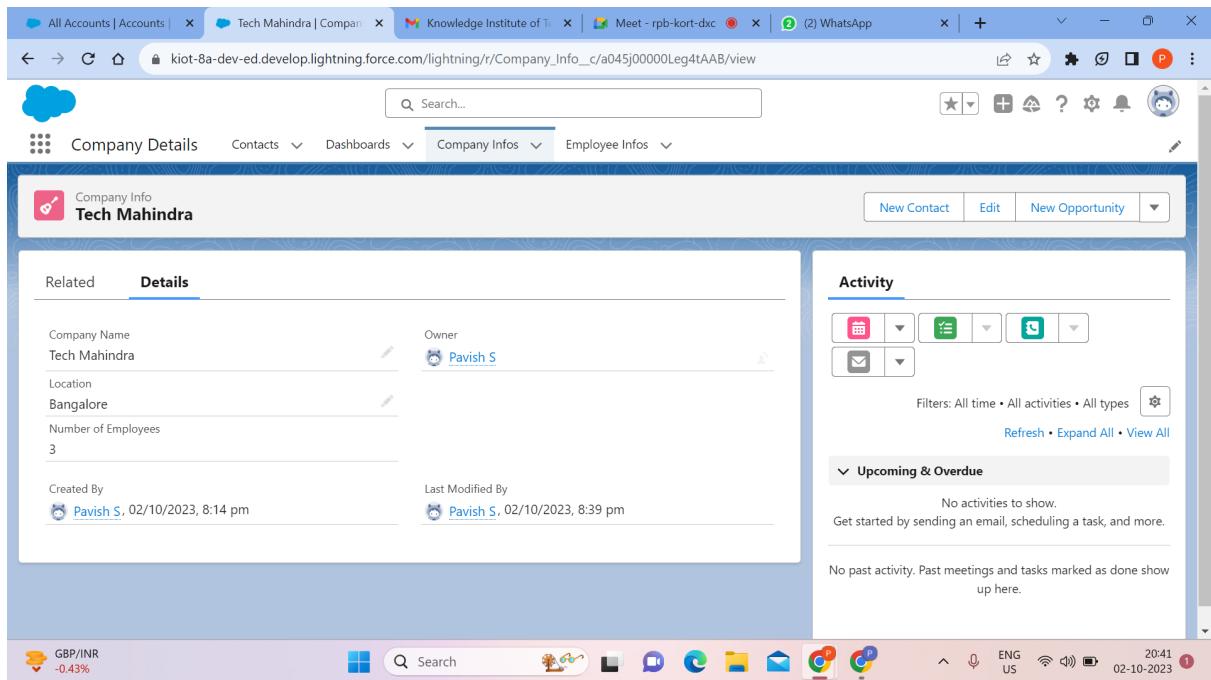
2.Create Master-Detail Relationship:

- 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.

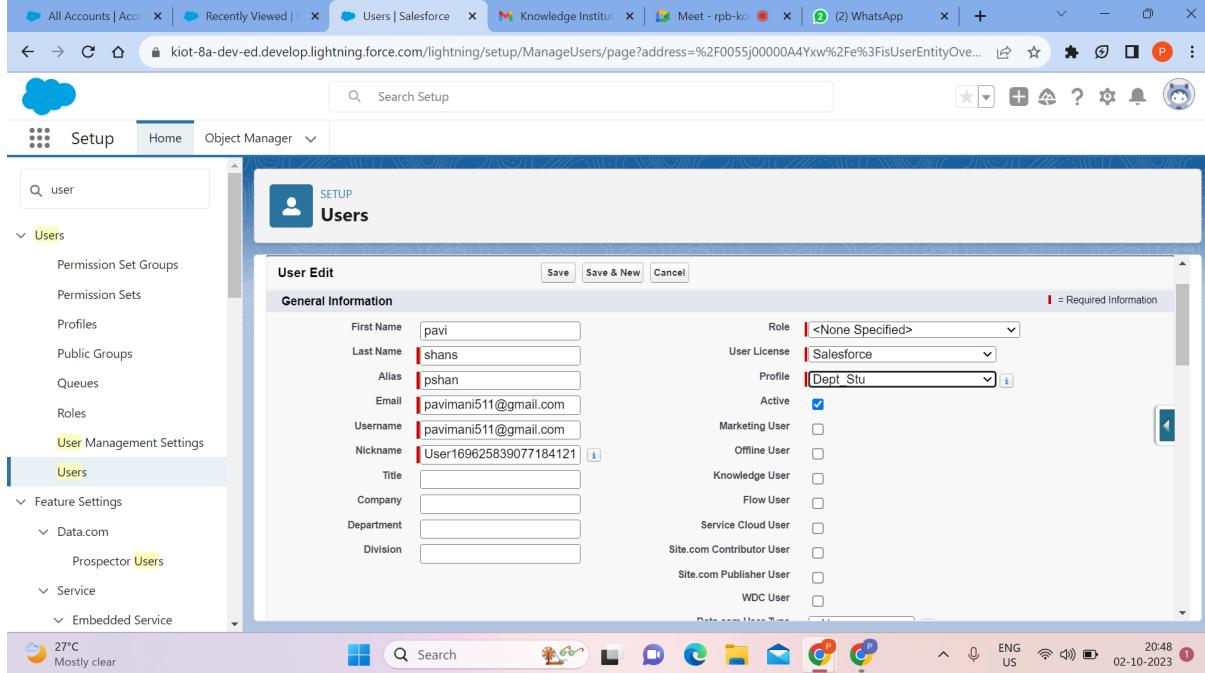
Assign a Password:

- 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.

	Account Name	Account Site	Billing State/Province	Phone	Type	Account Owner Alias
1	Burlington Textiles Corp of America	NC	(336) 222-7000	Customer - Direct	PS	
2	Dickenson plc	KS	(785) 241-6200	Customer - Channel	PS	
3	Edge Communications	TX	(512) 757-6000	Customer - Direct	PS	
4	Express Logistics and Transport	OR	(503) 421-7800	Customer - Channel	PS	
5	GenePoint	CA	(650) 867-3450	Customer - Channel	PS	
6	Grand Hotels & Resorts Ltd	IL	(312) 596-1000	Customer - Direct	PS	
7	pavish				pshan	
8	Pyramid Construction Inc.		(014) 427-4427	Customer - Channel	PS	
9	Sample Account for Entitlements				autproc	
10	sForce	CA	(415) 901-7000	Customer - Direct	PS	
11	United Oil & Gas Corp.	NY	(212) 842-5500	Customer - Direct	PS	
		Singapore	(650) 450-8810	Customer - Direct	PS	

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.

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:

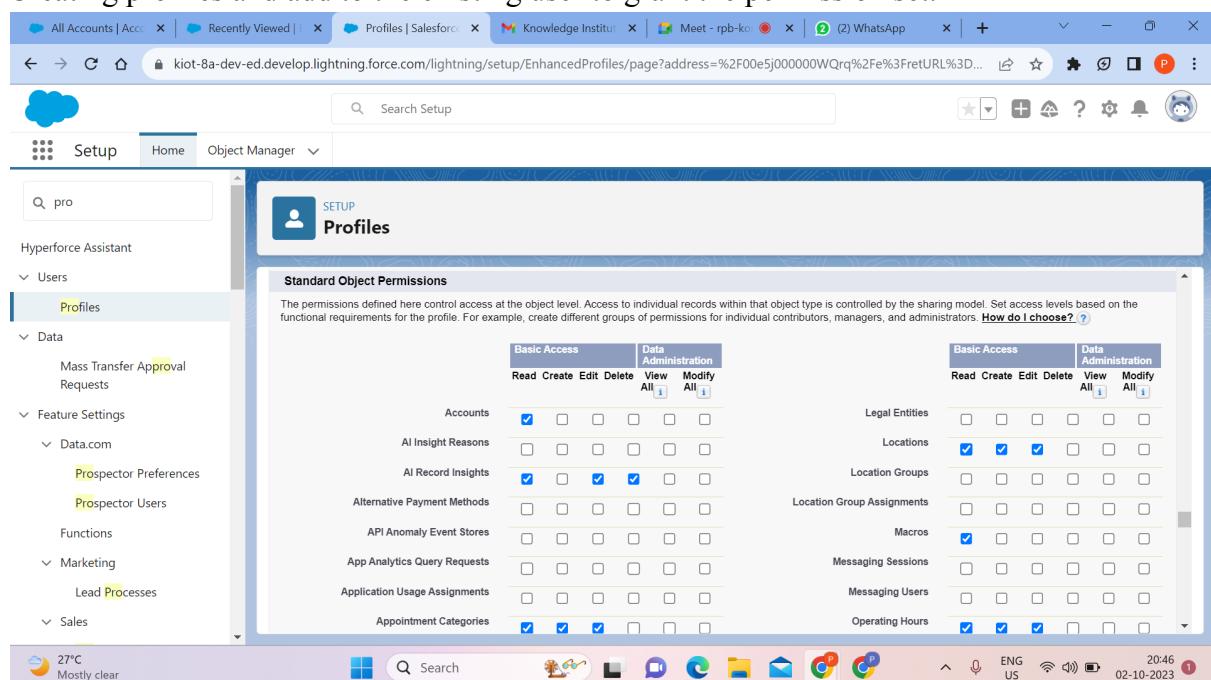
- Assign the newly created Permission Set with the "Delete" permission to the user you want to grant this access to.

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.



User Edit

General Information

First Name	pavi
Last Name	shans
Alias	pshan
Email	pavimani511@gmail.com
Username	pavimani511@gmail.com
Nickname	User169625839077184121
Title	
Company	
Department	
Division	

Role	<None Specified>
User License	Salesforce
Profile	Dept_Stu
Active	<input checked="" type="checkbox"/>
Marketing User	<input type="checkbox"/>
Offline User	<input type="checkbox"/>
Knowledge User	<input type="checkbox"/>
Flow User	<input type="checkbox"/>
Service Cloud User	<input type="checkbox"/>
Site.com Contributor User	<input type="checkbox"/>
Site.com Publisher User	<input type="checkbox"/>
WDC User	<input type="checkbox"/>

permission set

Available

Visible

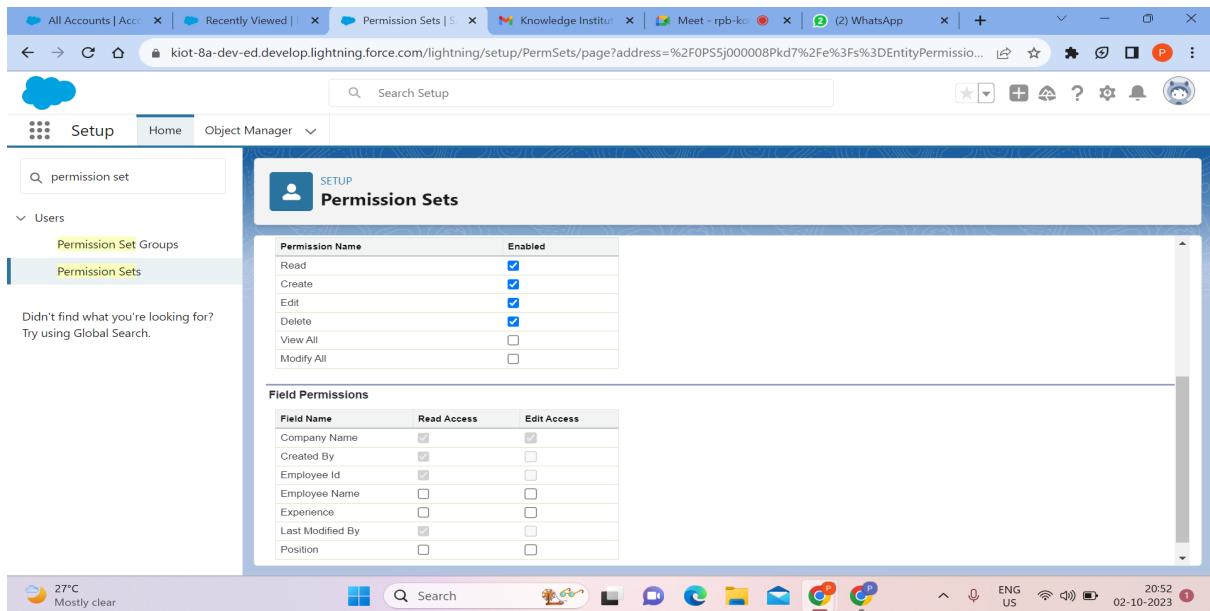
Object Permissions

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

Field Permissions

Field Name	Read Access	Edit Access
Company Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Created By	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Employee Id	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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

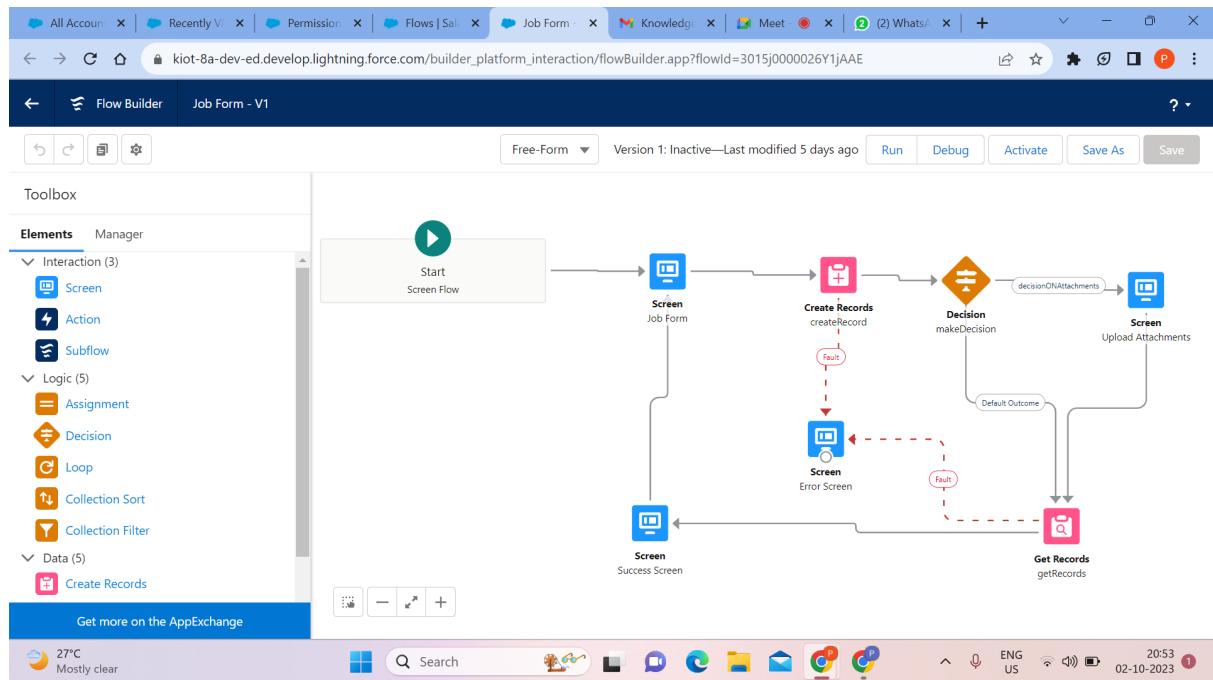
1. Log in to your Salesforce account.
2. Click on your profile picture or the gear icon in the upper-right corner.
3. Select "Setup" from the dropdown menu.

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.

The screenshot shows a Salesforce Flow debug session. On the left, a 'Job Form' screen displays an 'Upload Attachments' section with a file named 'ID_card.pdf' (424 KB) being uploaded. On the right, the 'Debug Details' pane shows the flow's logic:

- CREATE RECORDS:** createRecord


```
Create one Contact record where:
        = {jobEmail}
        name = {!First_Name} (Pavish)
        name = {!Last_Name} (Shan)
        phone = {!Phone_No.required} (true)
      
```
- ACTION: makeDecision**

```
When executed: decisionONAttachments
  Outcome conditions:
    (AnyAttachments) (true) Equals true
    All conditions must be true (AND)
```
- Transaction Committed**

```
Any records that the flow was ready to create, update, or delete were committed to the database.
```

The bottom part of the screenshot shows the operating system taskbar with a weather icon (27°C), a search bar, and various application icons. The date and time are also visible.

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.