NAAN MUDHALVAN
Salesforce Developer (Course)
Assignment no 1

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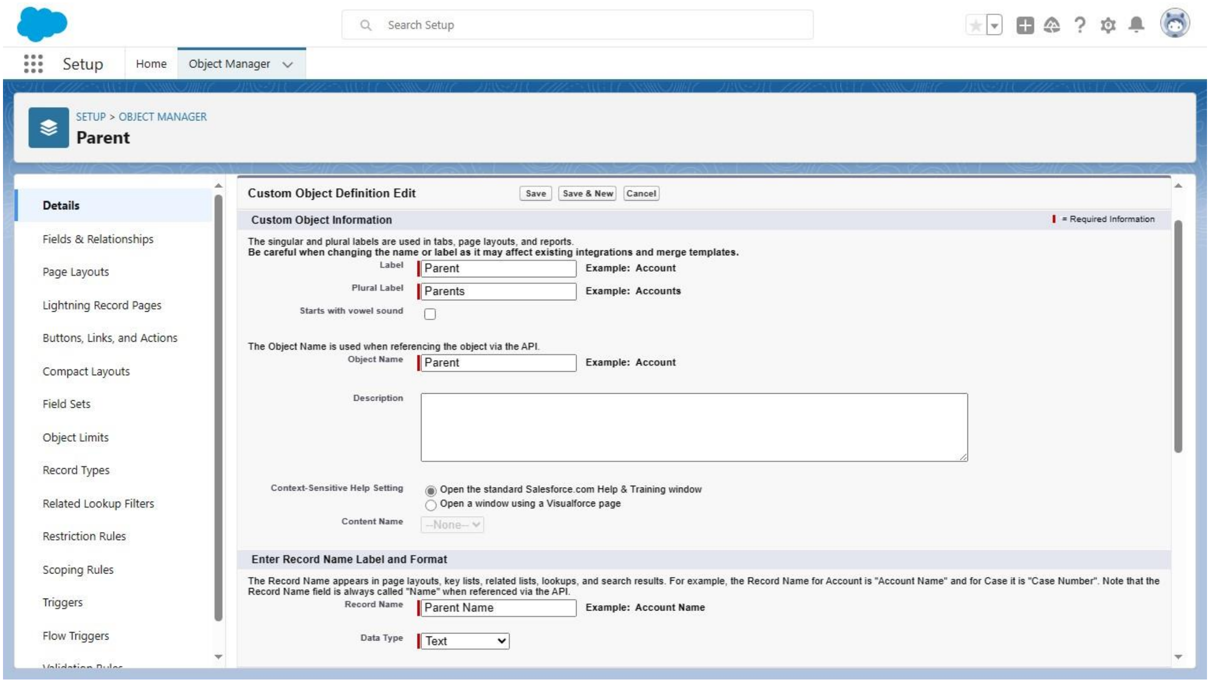
Year & Dep : IV year & CSBS

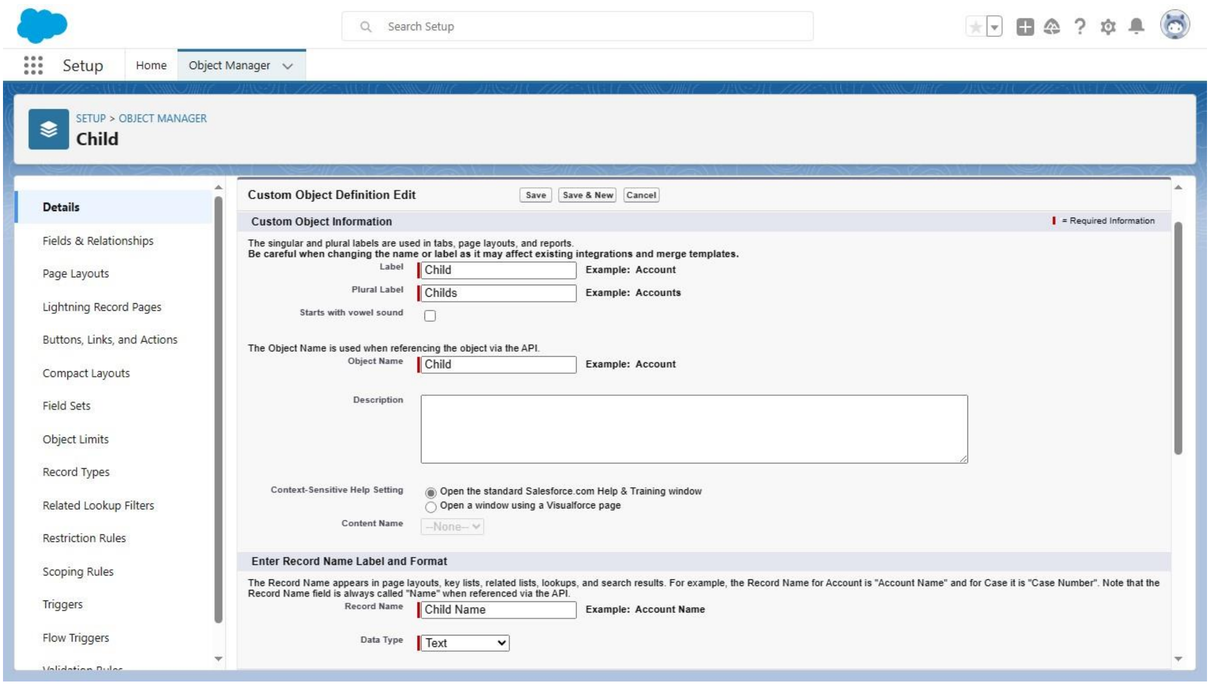
Batch : 2024

Zone no : Zone 8

1. Creating a Master-Detail Relationship between two custom objects and setting up a Roll-Up Summary Field to calculate the total number of records in the child object is a common task in Salesforce. Below are the steps to achieve this:

Step 1: Create Custom Objects.





Step 2: Create a Master-Detail Relationship

1. Go to "Setup" in Salesforce.

2. In the Quick Find box, type "Objects" and select "Objects and Fields" > "Objects".

3. Click on "Parent" to edit it.

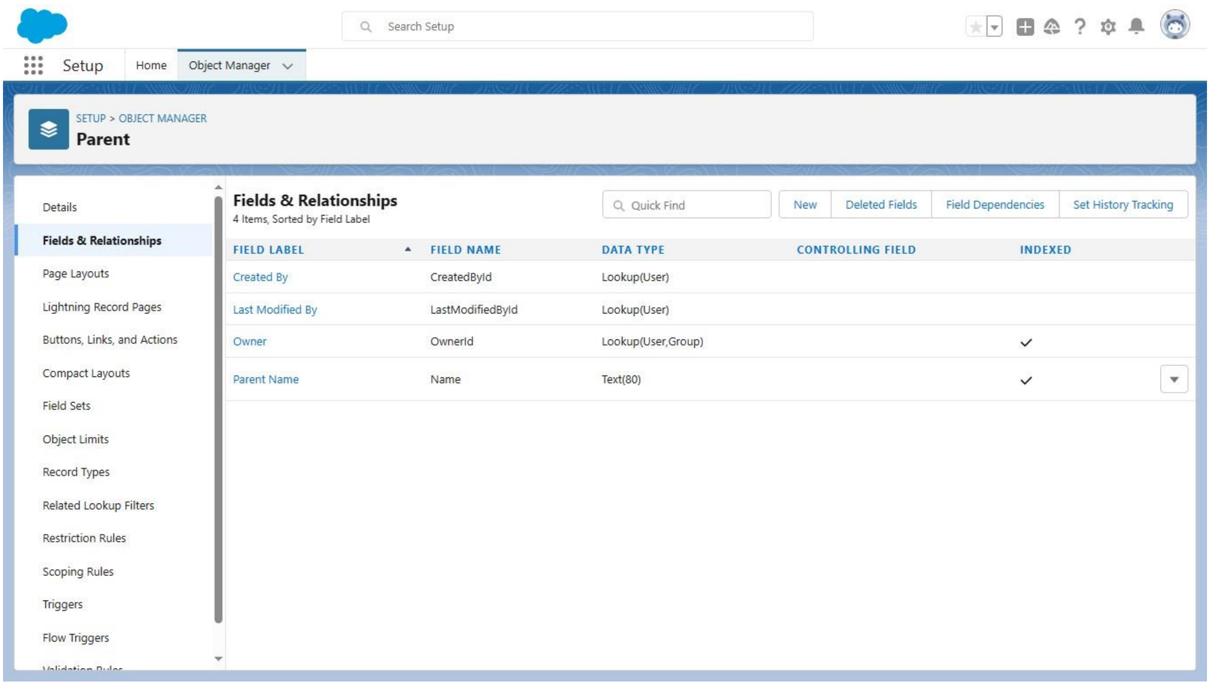
4. In the "Custom Fields & Relationships" section, click "New" under "Related To".

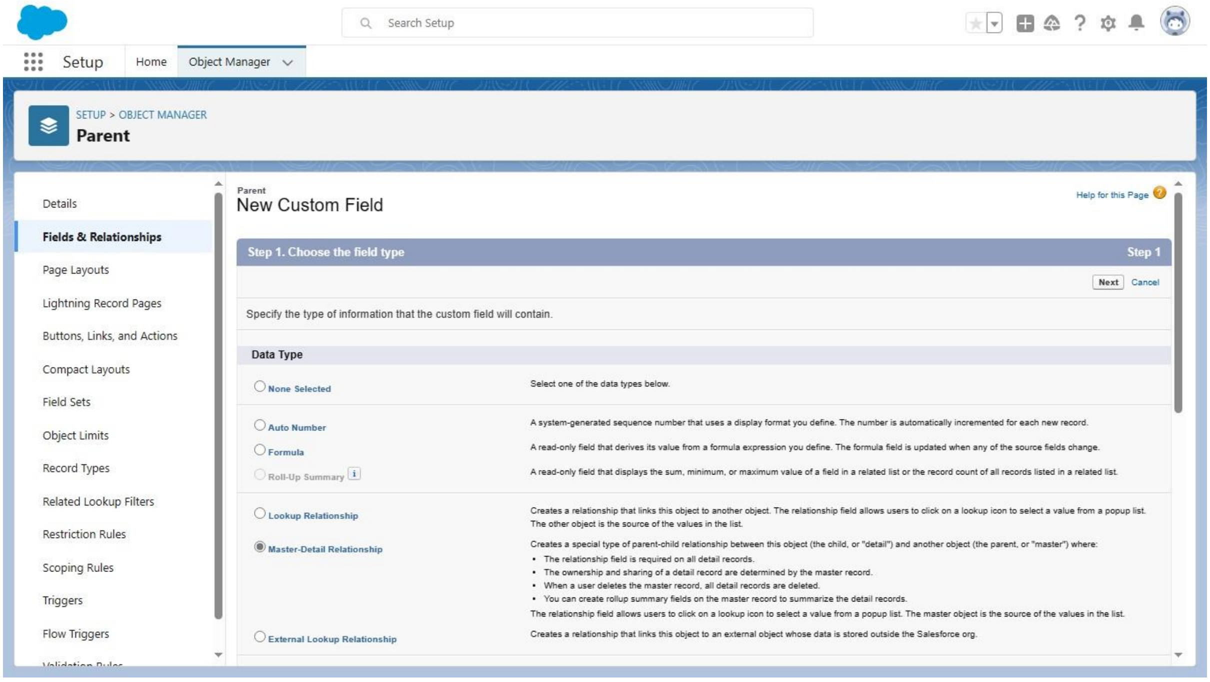
5. Choose "Master-Detail Relationship" as the data type.

6. In the "Related To" field, select "Child".

7. Configure other options as needed (e.g., setting the relationship name and whether it's required).

8. Save the changes.

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Setup
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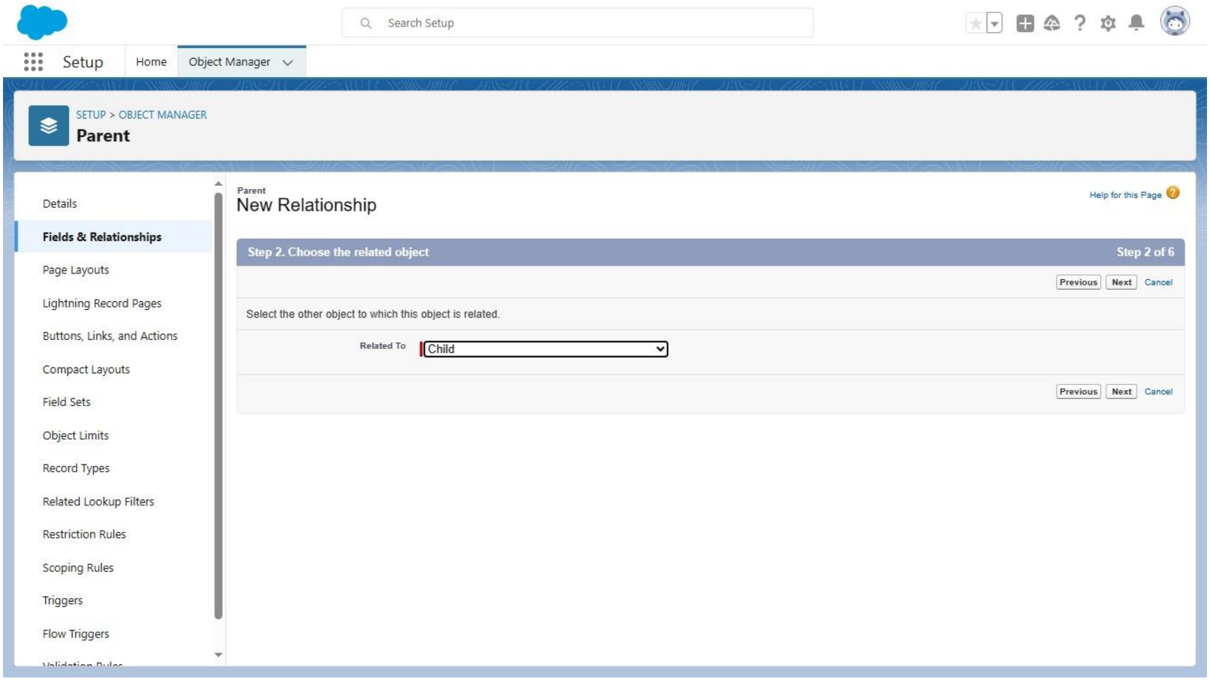
Object Manager
SETUP > OBJECT MANAGER
Parent
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Triggers
Flow Triggers
Parent
New Custom Field
Help 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.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Compact Layouts
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Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Triggers
Flow Triggers
Parent
New Relationship
Help for this Page
Step 2. Choose the related object
Step 2 of 6
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Next
Cancel
Select the other object to which this object is related.
Related To
Child
Previous
Next
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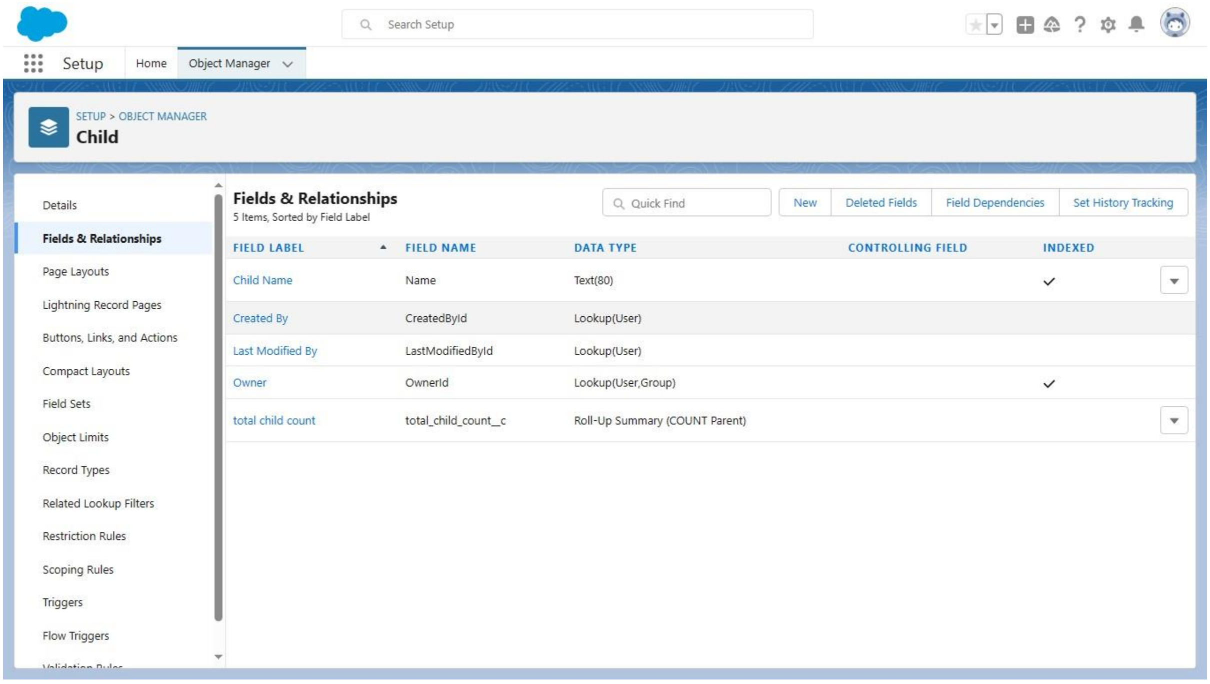
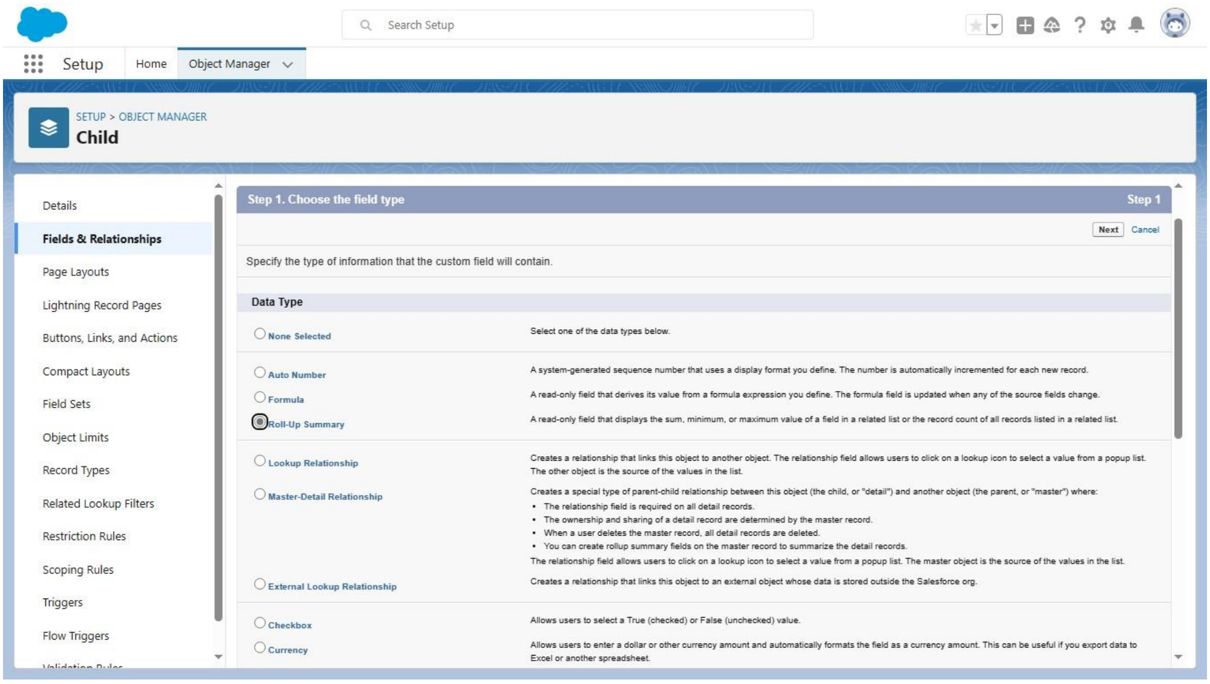




Step 3: Create a Roll-Up Summary Field

1. In the same "Parent" editing page, scroll down to the "Roll-Up Summary Fields" section.

2. Click "New Roll-Up Summary Field."

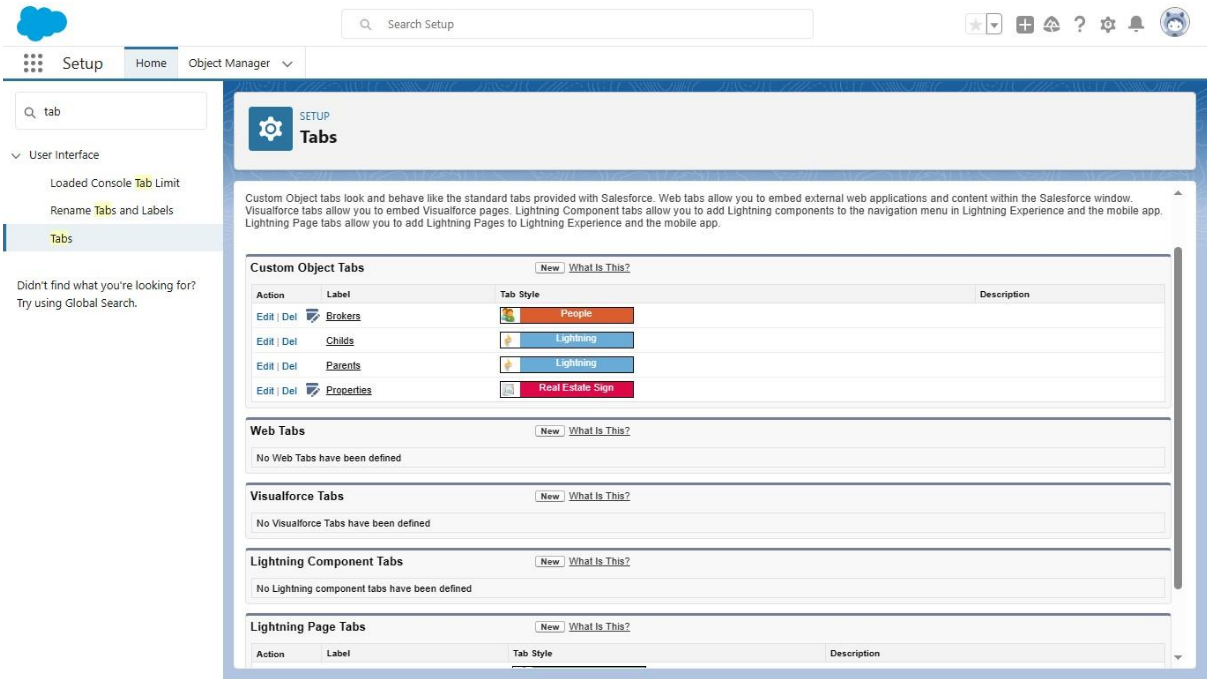
3. Choose the "Child" as the child object for which you want to calculate the total.

4. Give your Roll-Up Summary Field a name (e.g., "Total_Child_Records__c").

5. Choose the type of calculation you want (e.g., "COUNT").

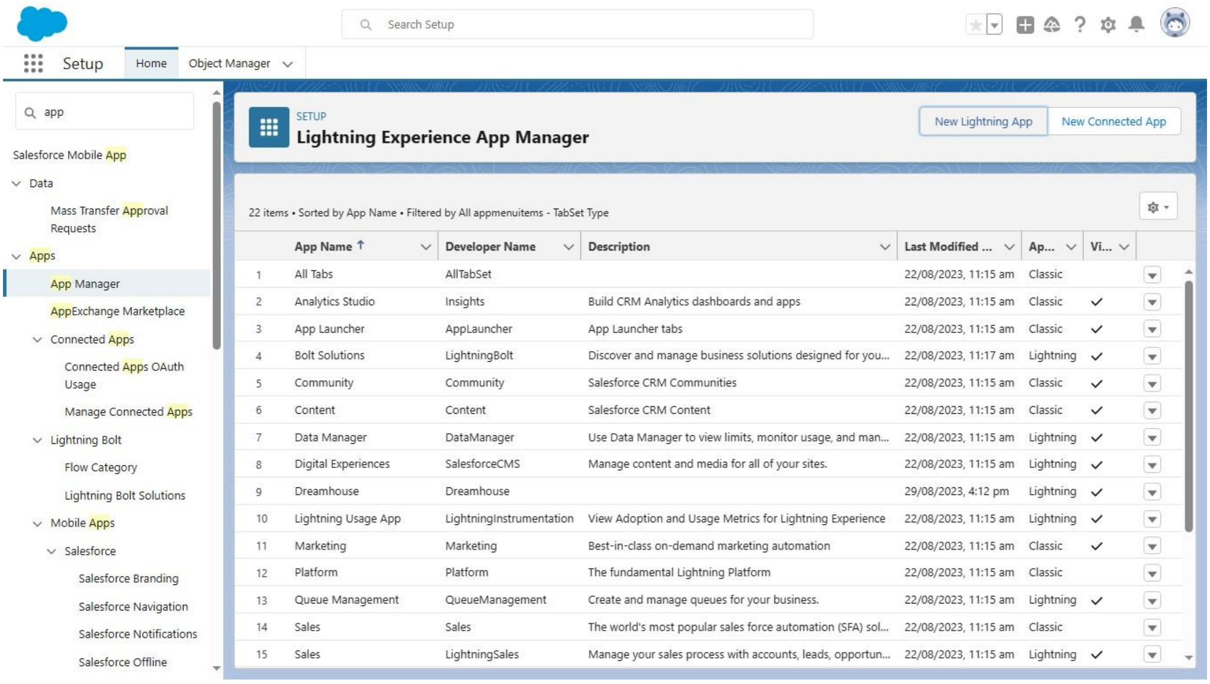
6. Configure any additional filter criteria if needed.

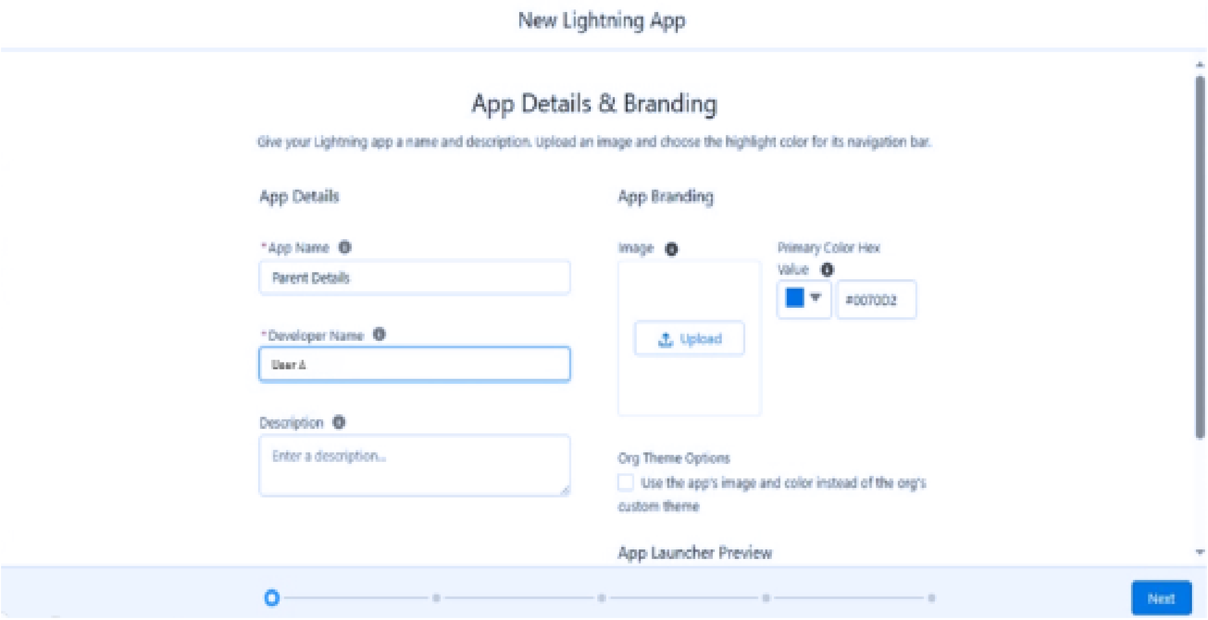
7. Save the changes.



Step 4: Update Page Layouts and Record Types (if necessary)

Depending on your use case, you may want to update page layouts and record types to make sure the new relationship and fields are displayed correctly to your users.

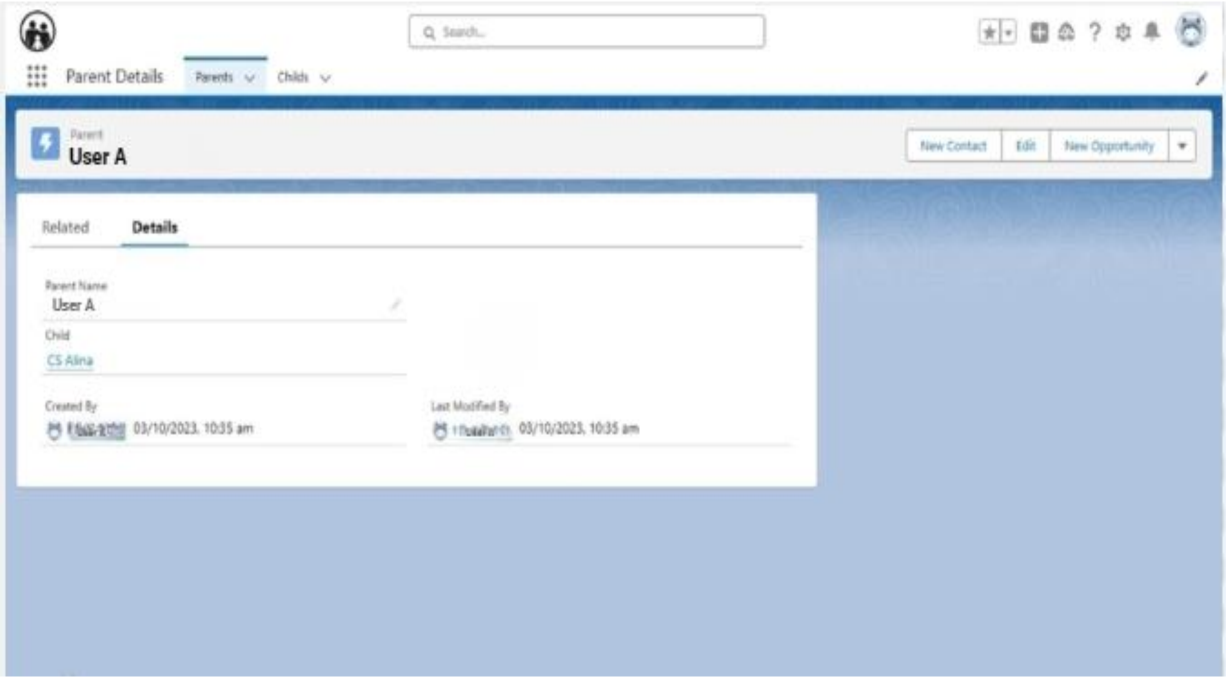




Step 5: Test the Relationship and Roll-Up Summary Field

Create some records in both the Parent and Child objects and verify that the Roll-Up Summary Field correctly calculates the total number of related Child records on the Parent record.

That's it! You've successfully created a Master-Detail relationship between two custom objects (Parent and Child) and set up a Roll-Up Summary Field to calculate the total number of records in the Child object.



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 th Security for the users.

Step 1: Create a Public Group

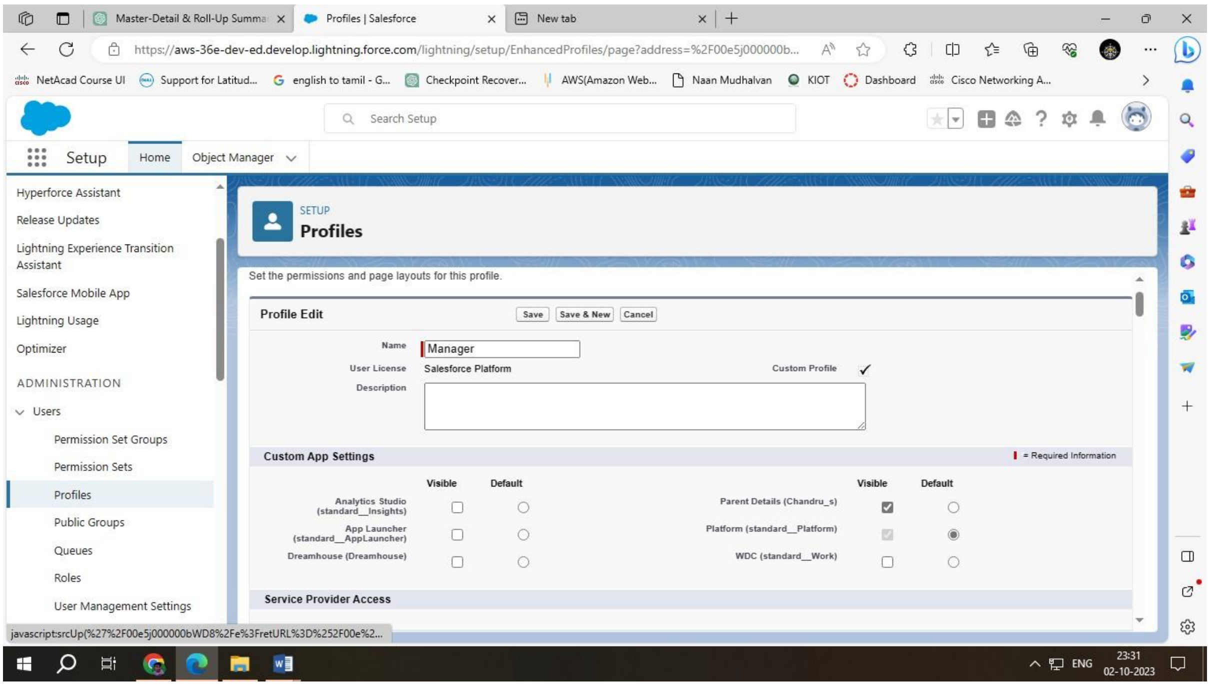
1. Go to "Setup" in Salesforce.

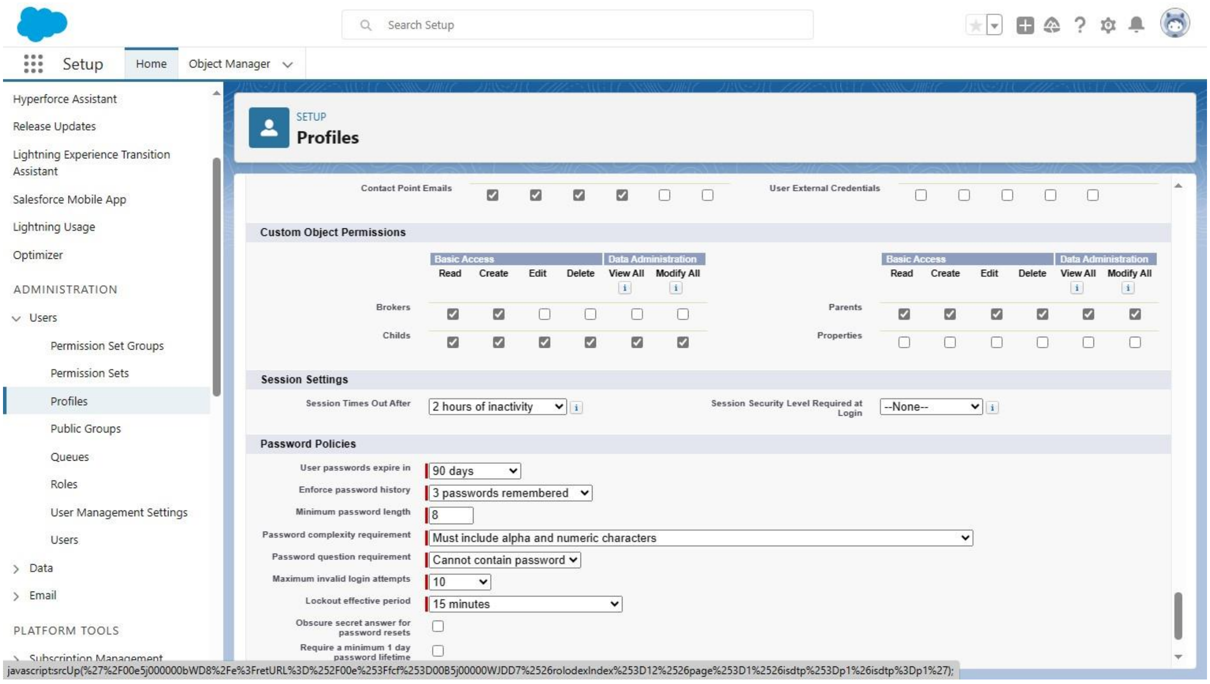
2. In the Quick Find box, type "Public Groups" and select it.

3. Click on "New Public Group."

4. Create a group for User A, let's call it "UserA_Group," and add User A to this group.

5. Create another group for User B, let's call it "UserB_Group," and add User B to this group.





Step 2: Create Criteria-Based Sharing Rules

For User A:1. Go to "Setup" in Salesforce.

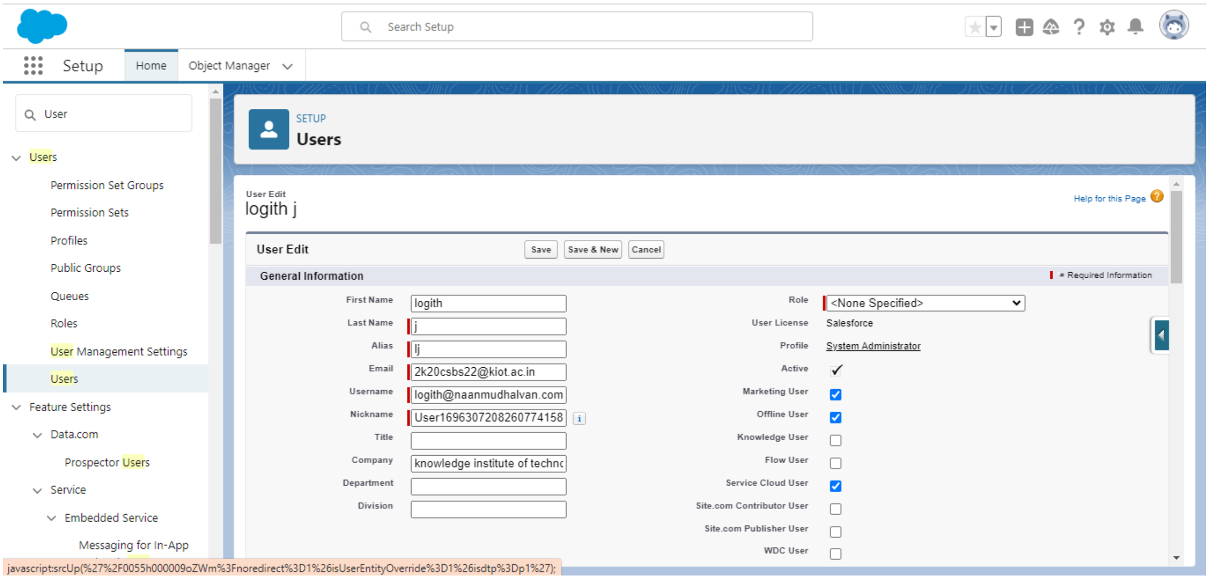
2. In the Quick Find box, type "Sharing Rules" and select "Sharing Settings."

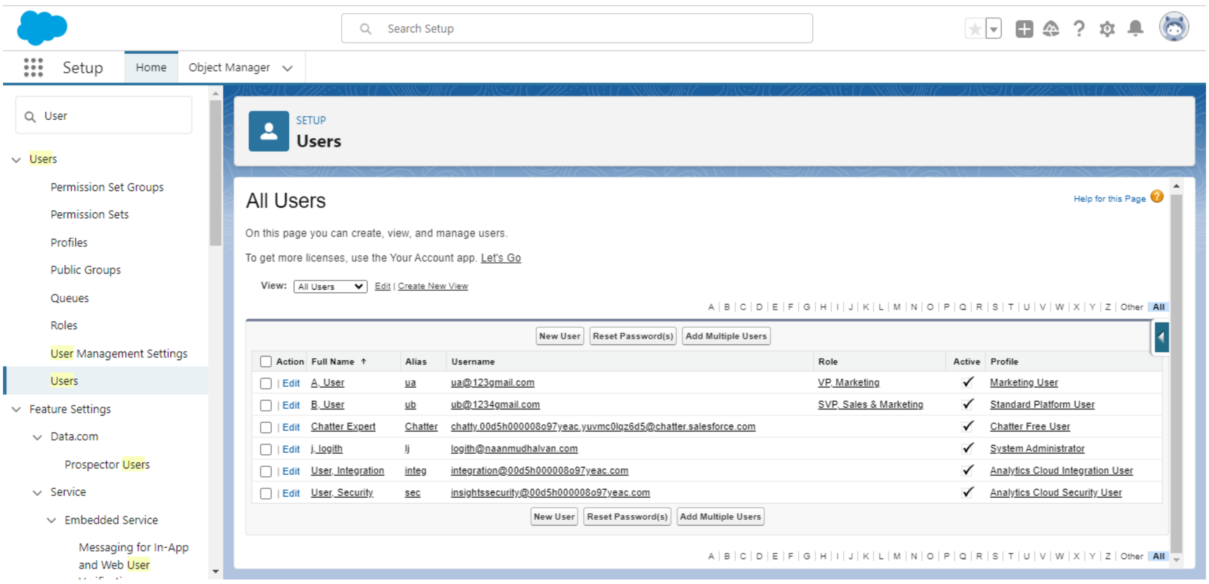
3. Under "Account Sharing Rules," click on "New Sharing Rule."

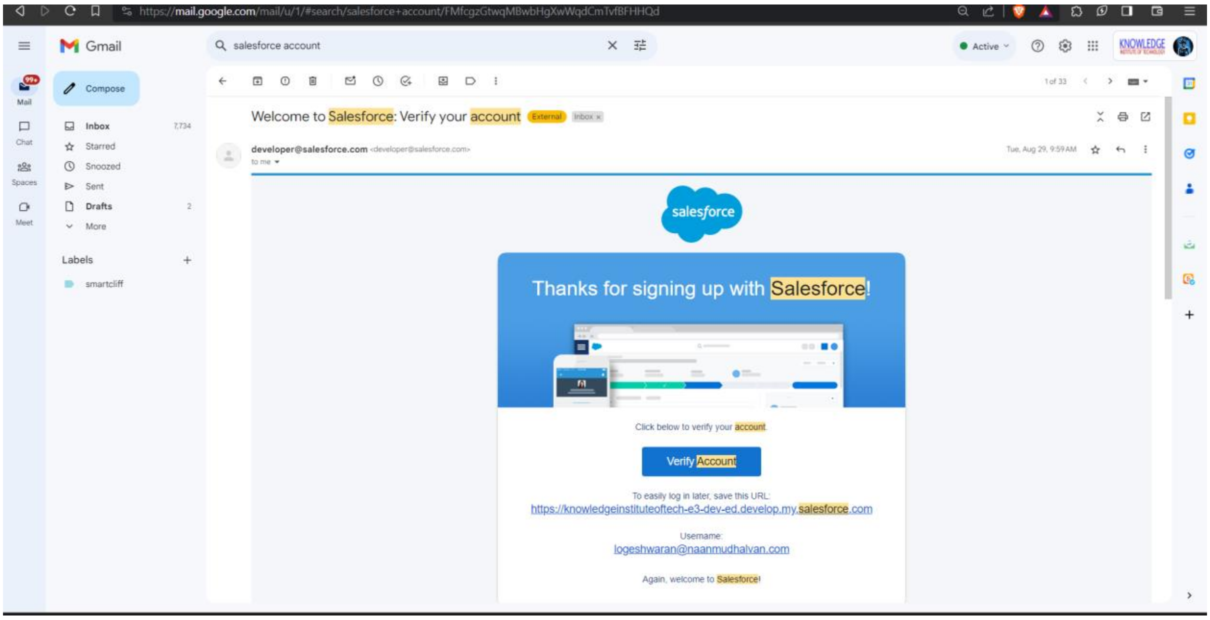
4. Create a rule that shares records owned by members of "UserB_Group" with the "UserA_Group."

5. Define the criteria based on which records should be shared (e.g., ownership).

6. Save the sharing rule.



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Welcome to Salesforce: Verify your account
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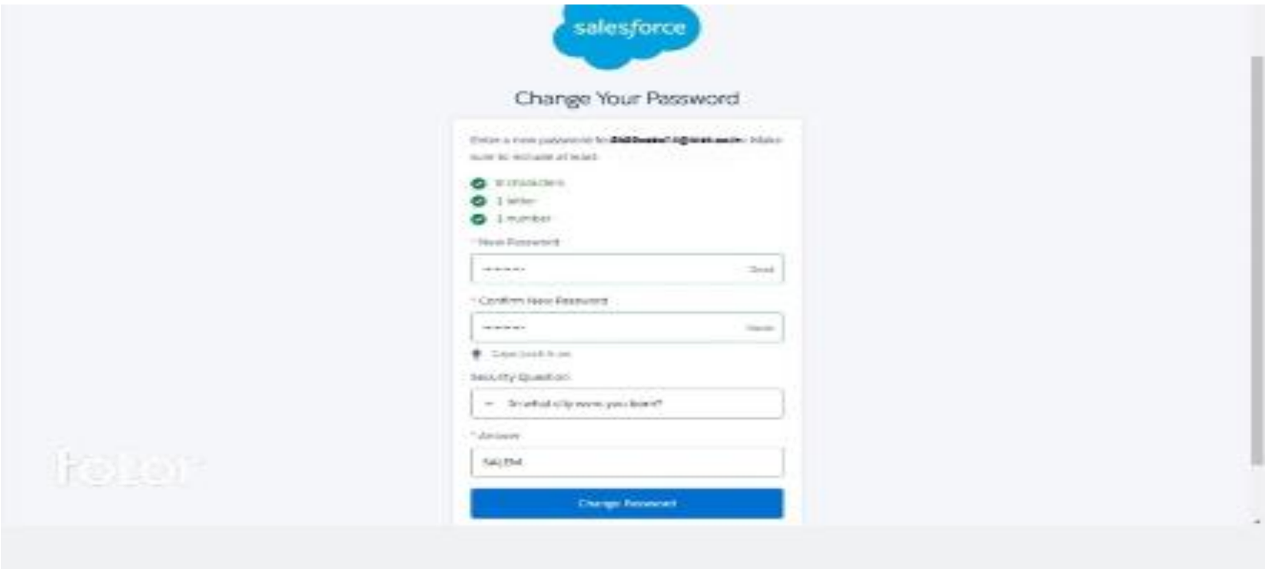
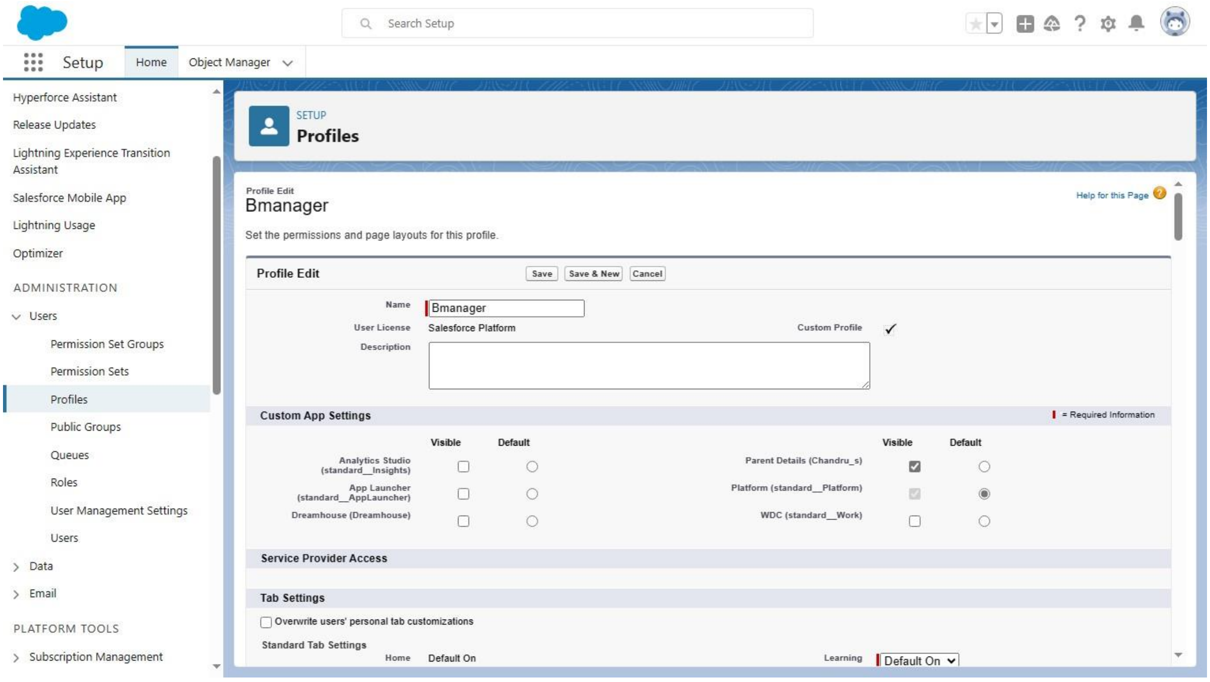
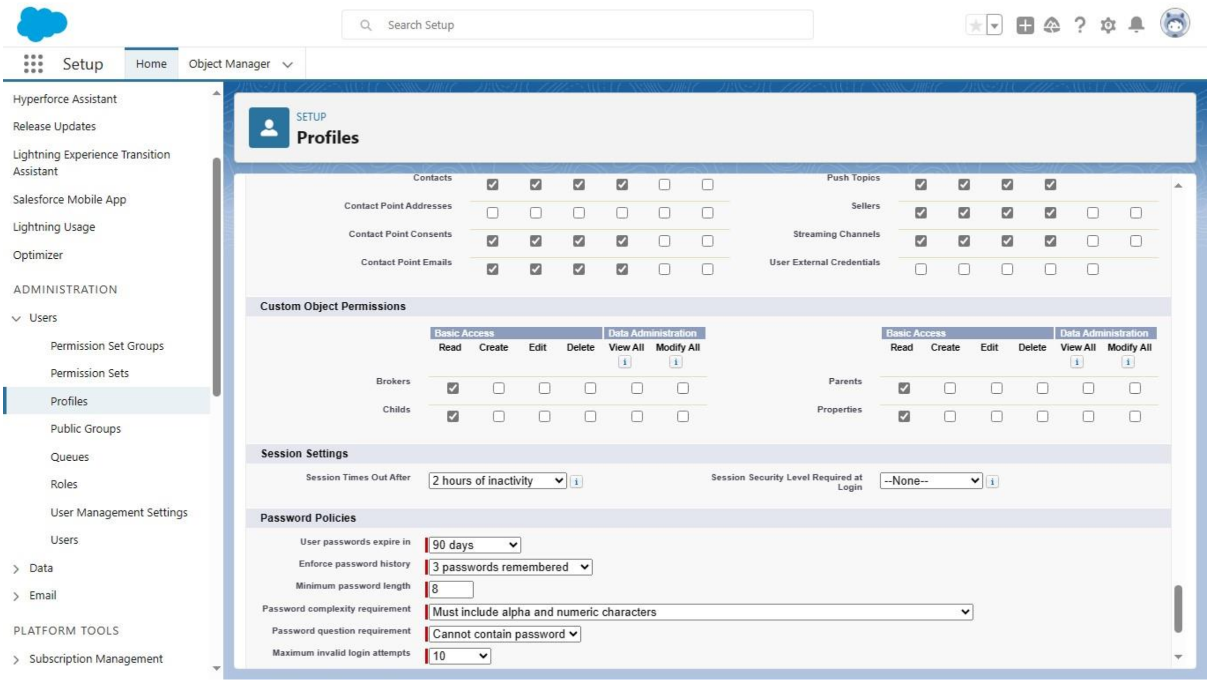
Thanks for signing up with Salesforce!
Click below to verify your account.
Verify Account
To easily log in later, save this URL:
https://knowledgeinstituteoftech-e3-dev-ed.develop.my.salesforce.com
Username:
logeshwaran@naanmudhalvan.com
Again, welcome to Salesforce!


salesforce
Change Your Password





For User B:

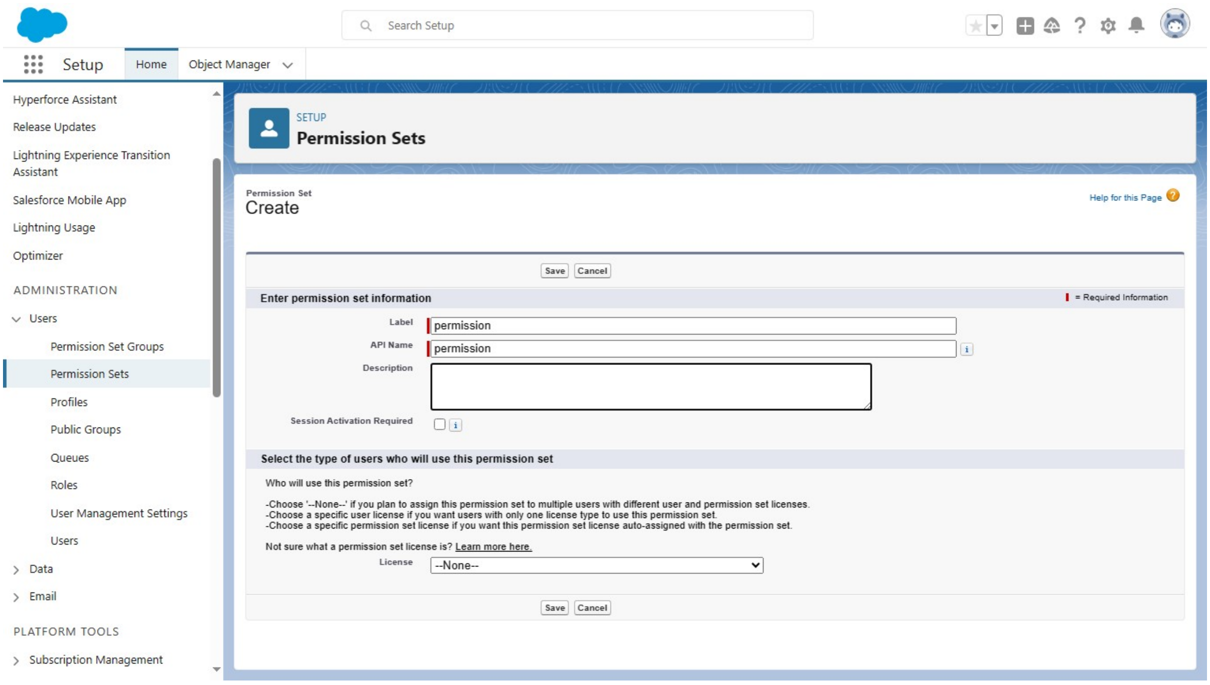
1. Follow the same steps as above but create a separate sharing rule for User B.

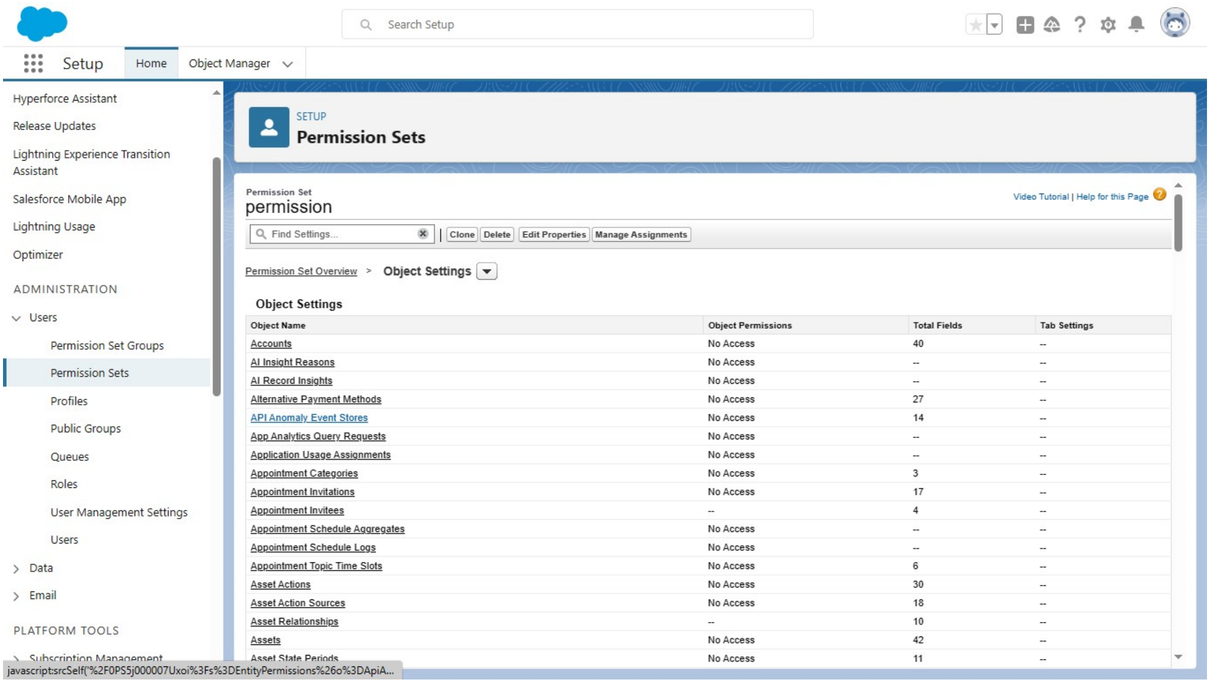
2. This rule should share records owned by members of "UserA_Group" with the "UserB_Group."

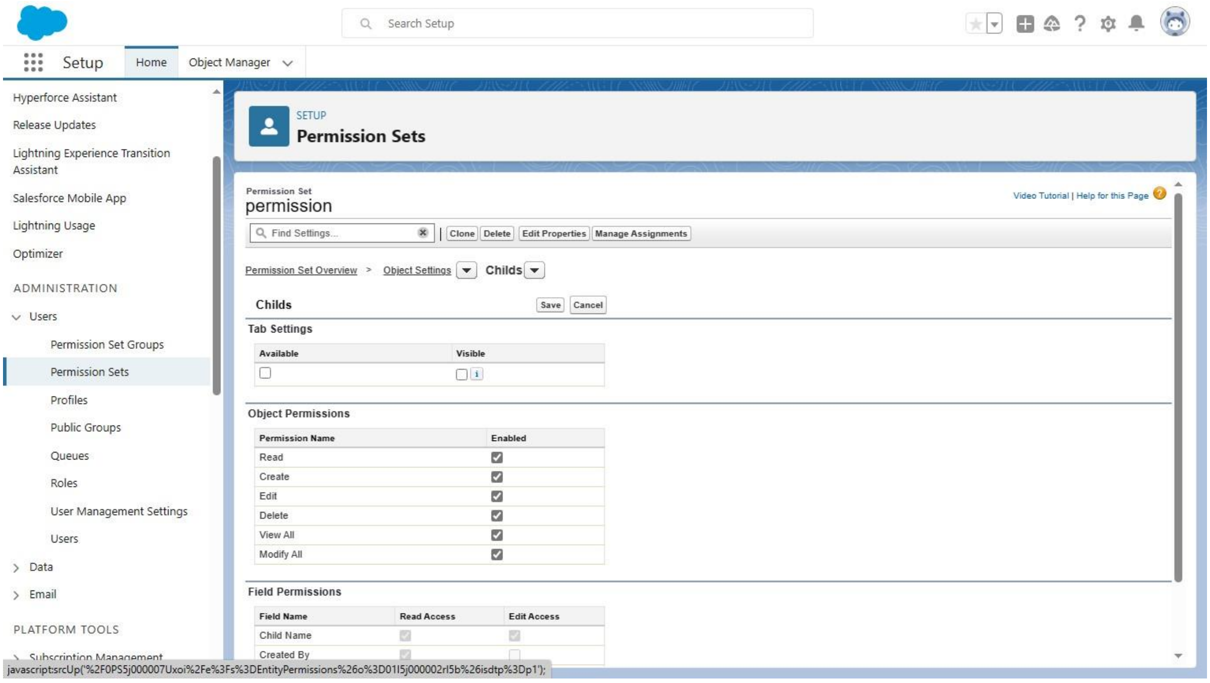
3. Define the criteria based on which records should be shared.

4. Save the sharing rule.

Step 3: Assign Records Ownership



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Lightning Experience Transition Assistant
Salesforce Mobile App
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Permission Set Overview > Object Settings > Childs
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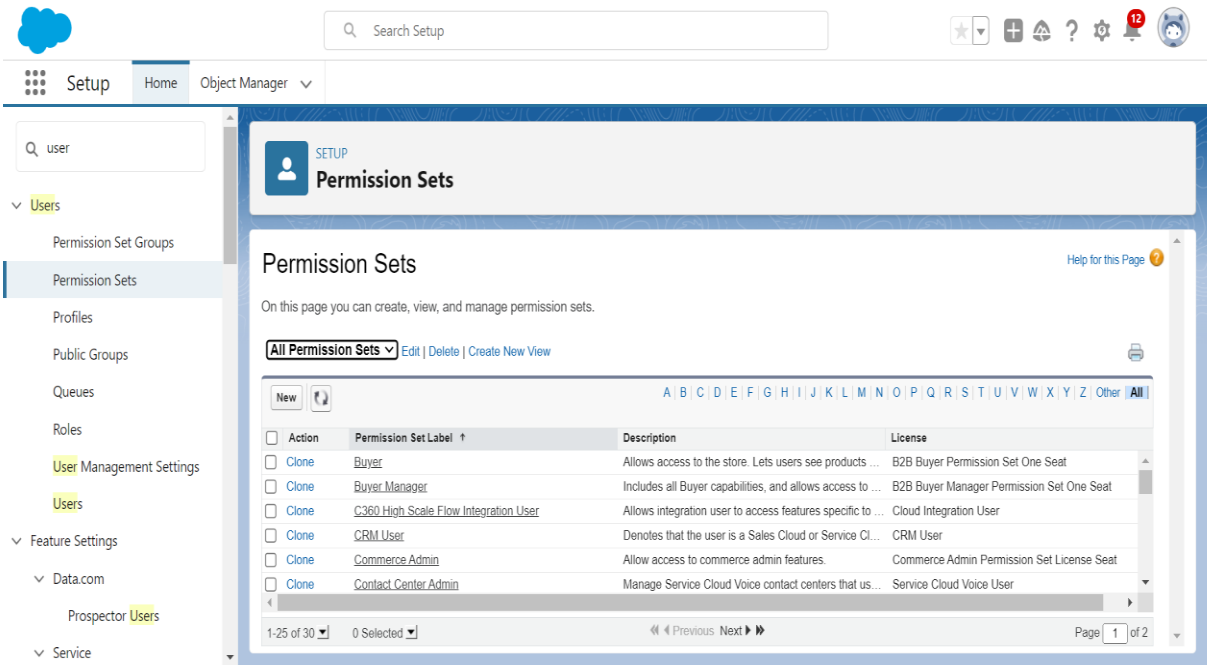
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Prospector Users
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Permission Sets
Permission Sets
Help for this Page
On this page you can create, view, and manage permission sets.
All Permission Sets
Edit | Delete | Create New View
New
A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All
Action
Permission Set Label
Description
License
Clone
Buyer
Allows access to the store. Lets users see products ...
B2B Buyer Permission Set One Seat
Clone
Buyer Manager
Includes all Buyer capabilities, and allows access to ...
B2B Buyer Manager Permission Set One Seat
Clone
C360 High Scale Flow Integration User
Allows integration user to access features specific to ...
Cloud Integration User
Clone
CRM User
Denotes that the user is a Sales Cloud or Service Cl...
CRM User
Clone
Commerce Admin
Allow access to commerce admin features.
Commerce Admin Permission Set License Seat
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Service Cloud Voice User
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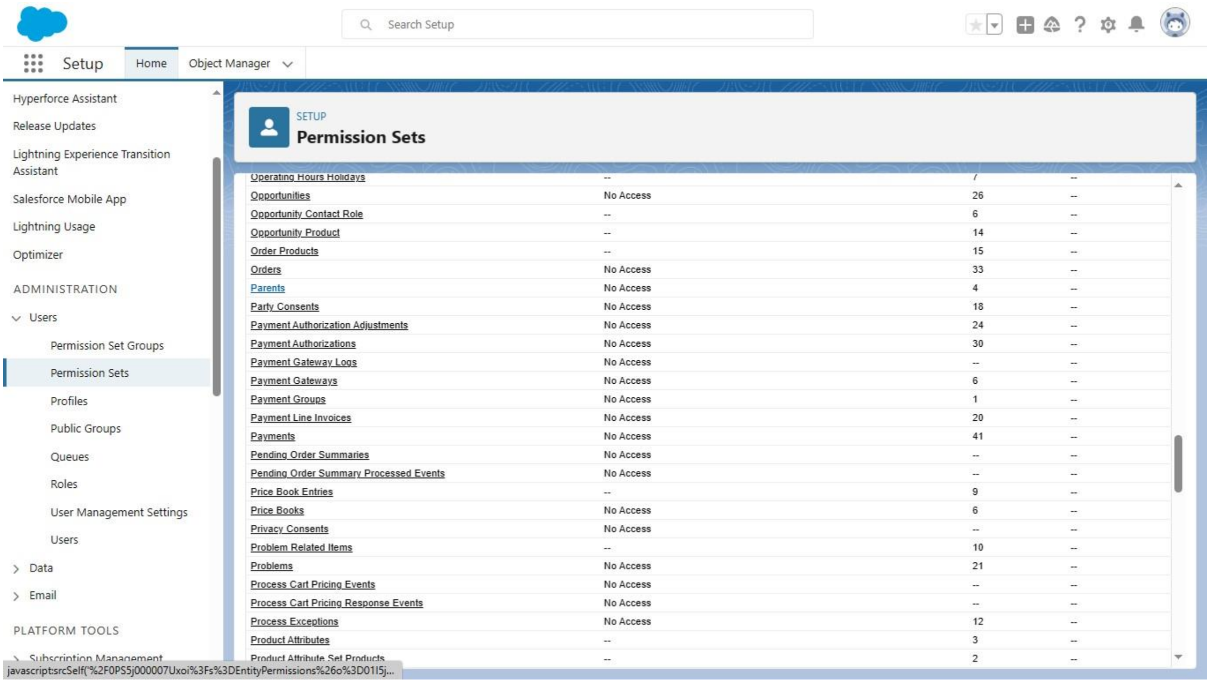
Assignment Summary


Assignment Summary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Lightning Experience Transition Assistant
Salesforce Mobile App
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SETUP
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Operating Hours Holidays -- 7 --
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Opportunity Contact Role -- 6 --
Opportunity Product -- 14 --
Order Products -- 15 --
Orders No Access 33 --
Parents No Access 4 --
Party Consents No Access 18 --
Payment Authorization Adjustments No Access 24 --
Payment Authorizations No Access 30 --
Payment Gateway Logs No Access -- --
Payment Gateways No Access 6 --
Payment Groups No Access 1 --
Payment Line Invoices No Access 20 --
Payments No Access 41 --
Pending Order Summaries No Access -- --
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Price Book Entries -- 9 --
Price Books No Access 6 --
Privacy Consents No Access -- --
Problem Related Items -- 10 --
Problems No Access 21 --
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Process Cart Pricing Response Events No Access -- --
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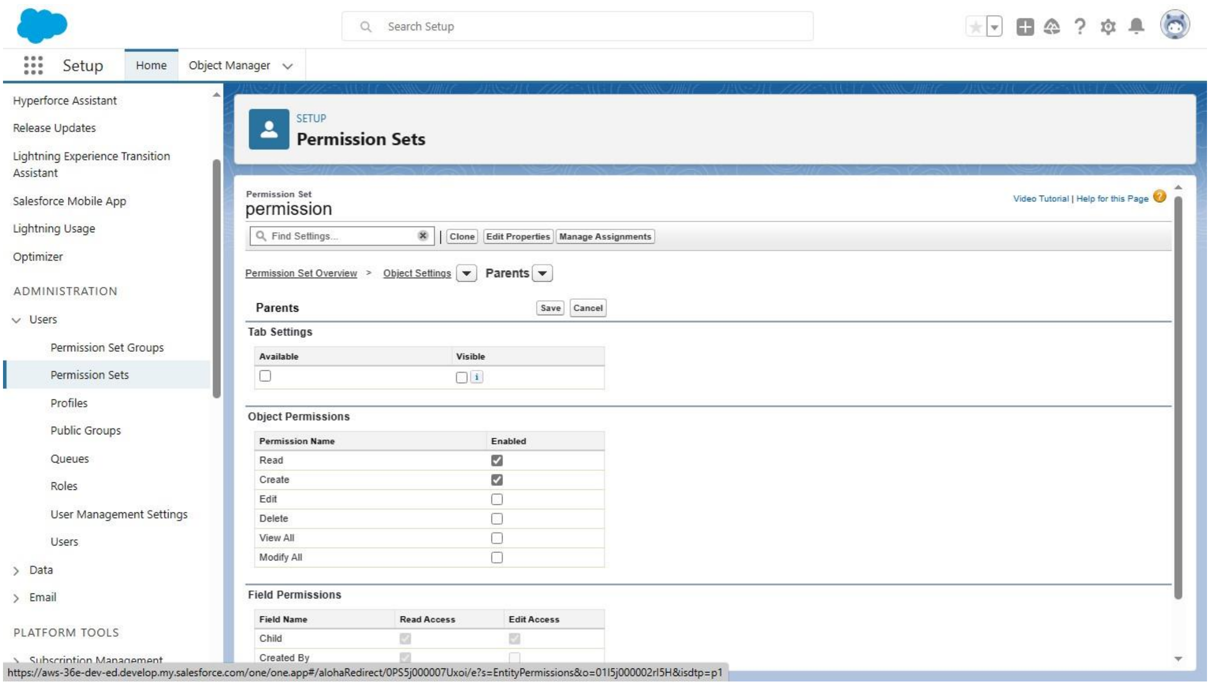
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3.Suppose there are 2 Users and they are having Create, Read, Edit access on Account Object with the same profile but we want to open up the access for one user to delete how will you implement the Security setting.

Step 1: Create a Permission Set for Delete Access

1. Go to "Setup" in Salesforce.

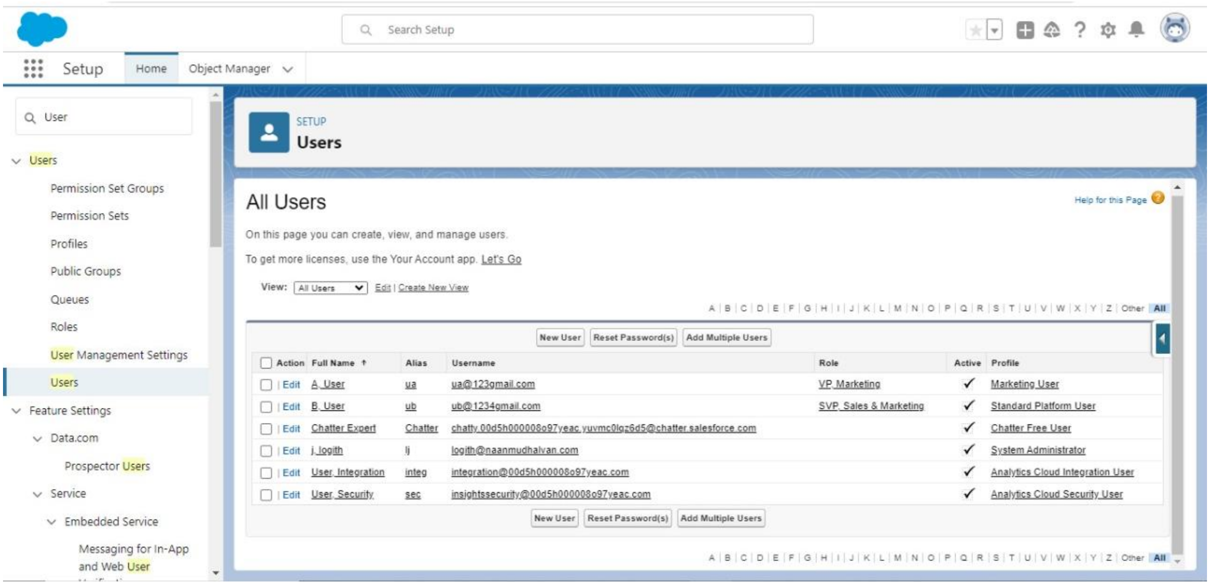
2. In the Quick Find box, type "Permission Sets" and select it.

3. Click "New Permission Set" to create a new one.

4. Give the permission set a name (e.g., "Delete Access Permission Set").

5. In the "System Permissions" section, find and enable the "Delete" permission for the "Account" object.

6. Save the permission set.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Embedded Service
Messaging for In-App and Web User
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Help for this Page
On this page you can create, view, and manage users.
To get more licenses, use the Your Account app. Let's Go
View: All Users Edit | Create New View
New User Reset Password(s) Add Multiple Users
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Edit B, User ub ub@1234gmail.com SVP, Sales & Marketing Standard Platform User
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Edit User, Integration integ integration@00d5h000008o97yeac.com Analytics Cloud Integration User
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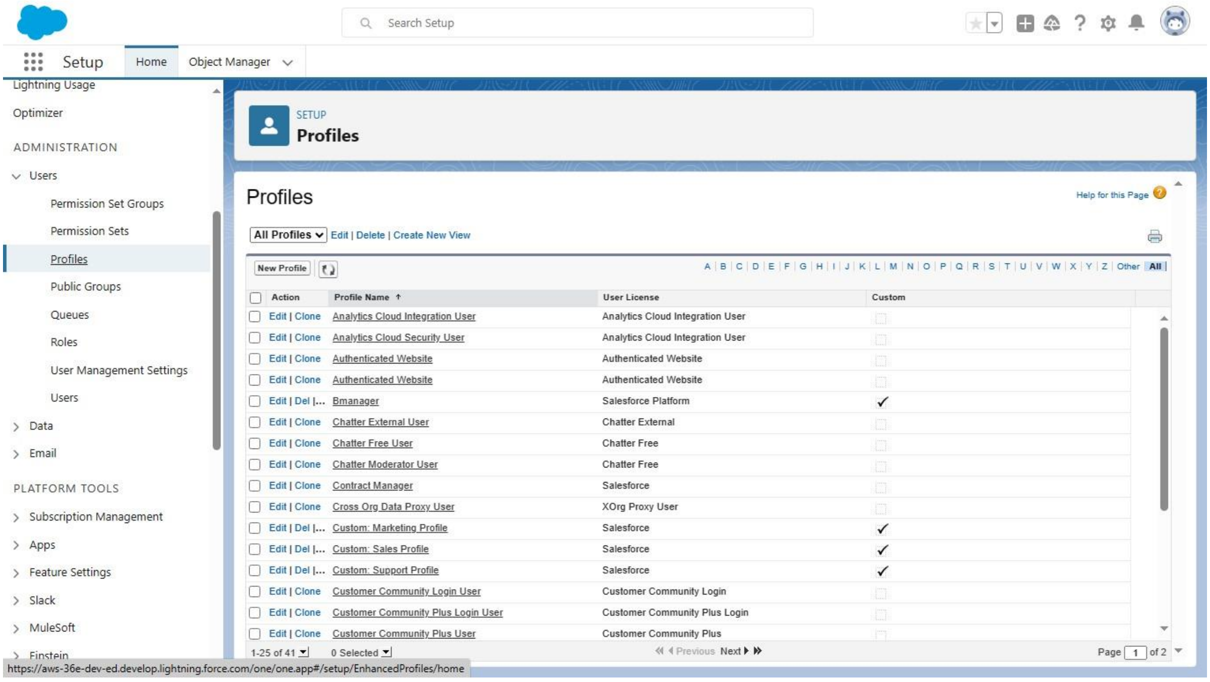
New User Reset Password(s) Add Multiple Users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Edit | Del | ... Custom: Sales Profile Salesforce
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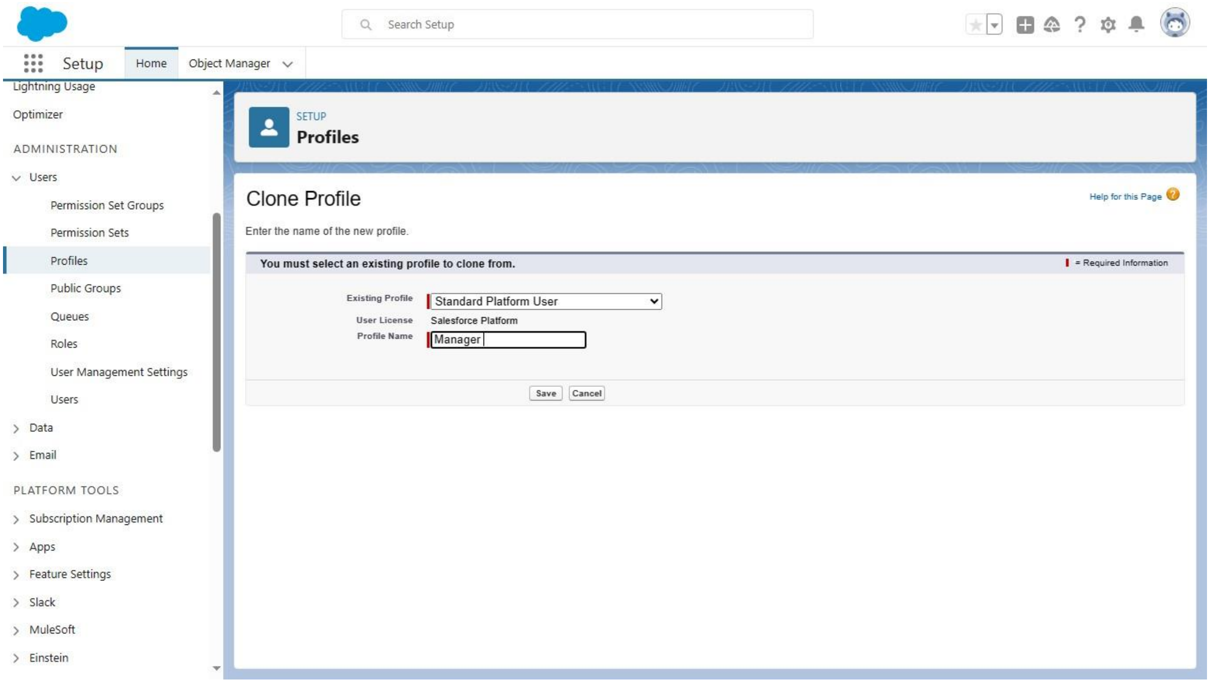
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Clone Profile
Help for this Page
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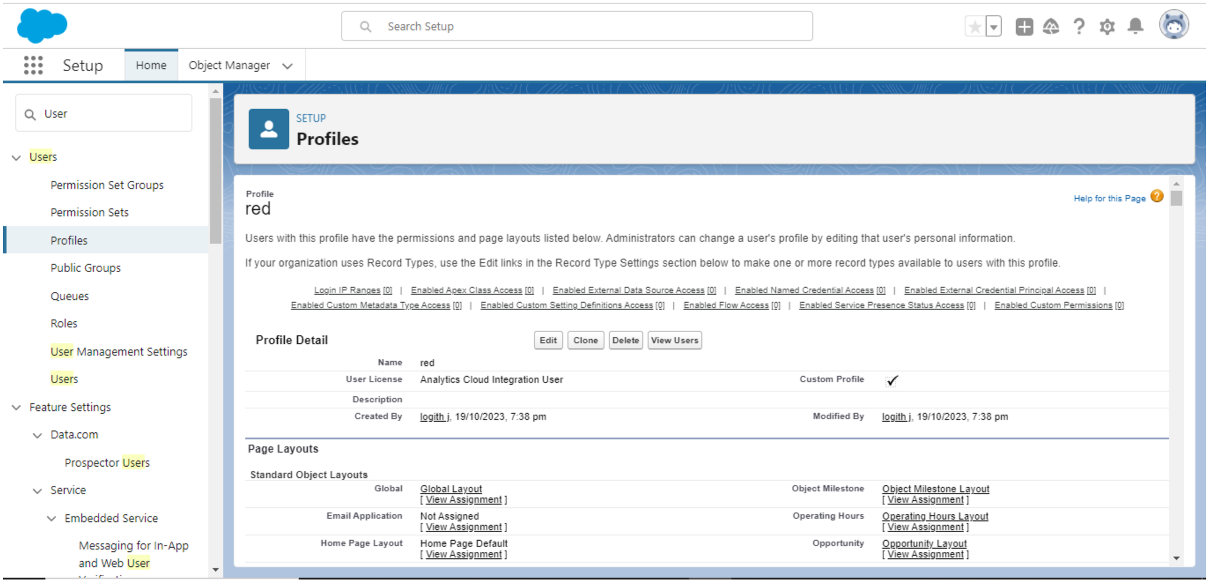
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Data.com
Prospector Users
Service
Embedded Service
Messaging for In-App and Web User
SETUP
Profiles
Profile
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Help for this Page
Users with this profile have the permissions and page layouts listed 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 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]
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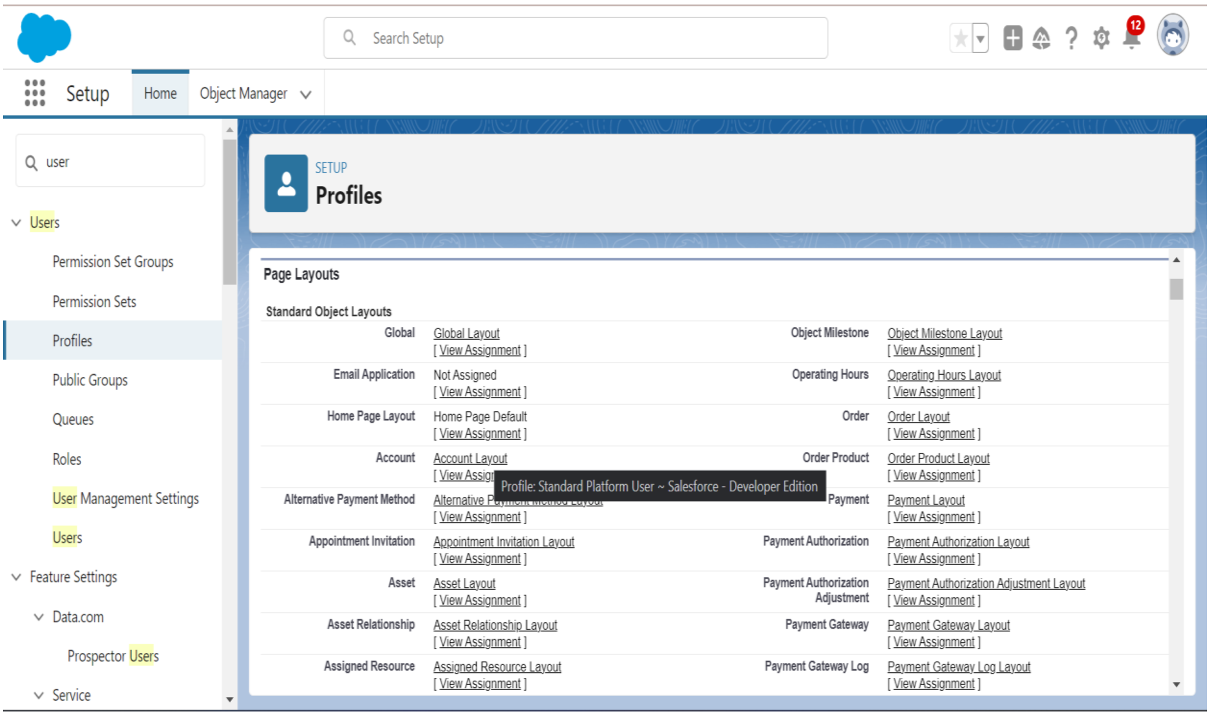
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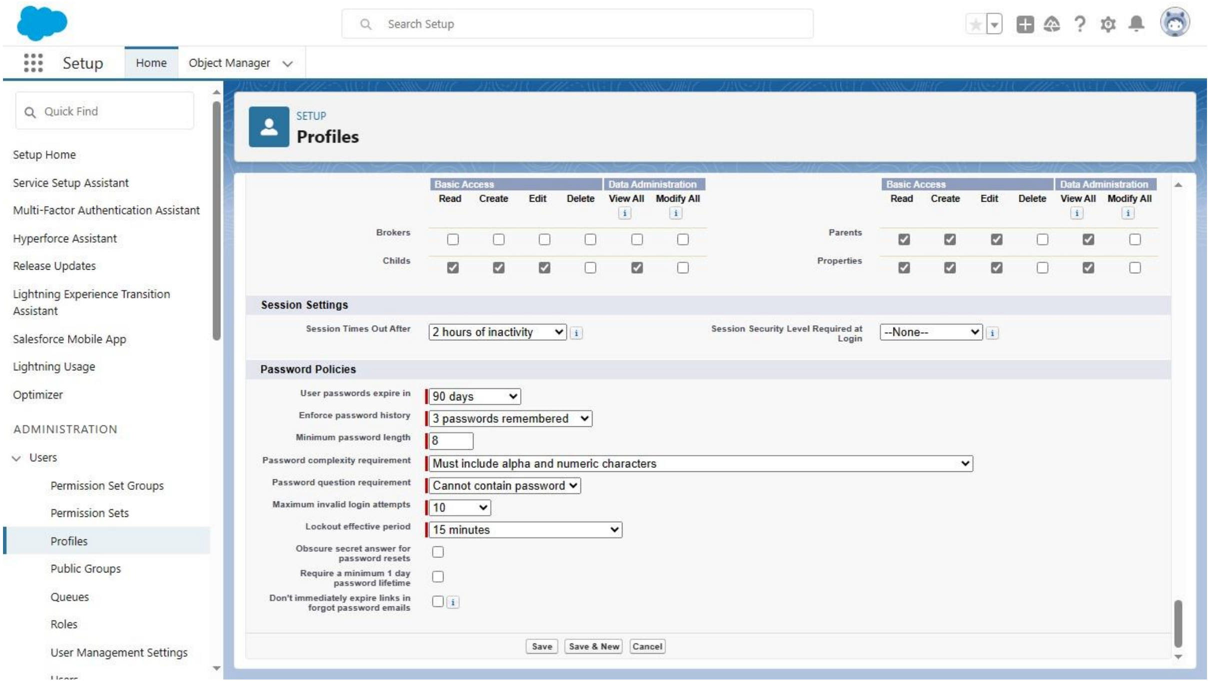
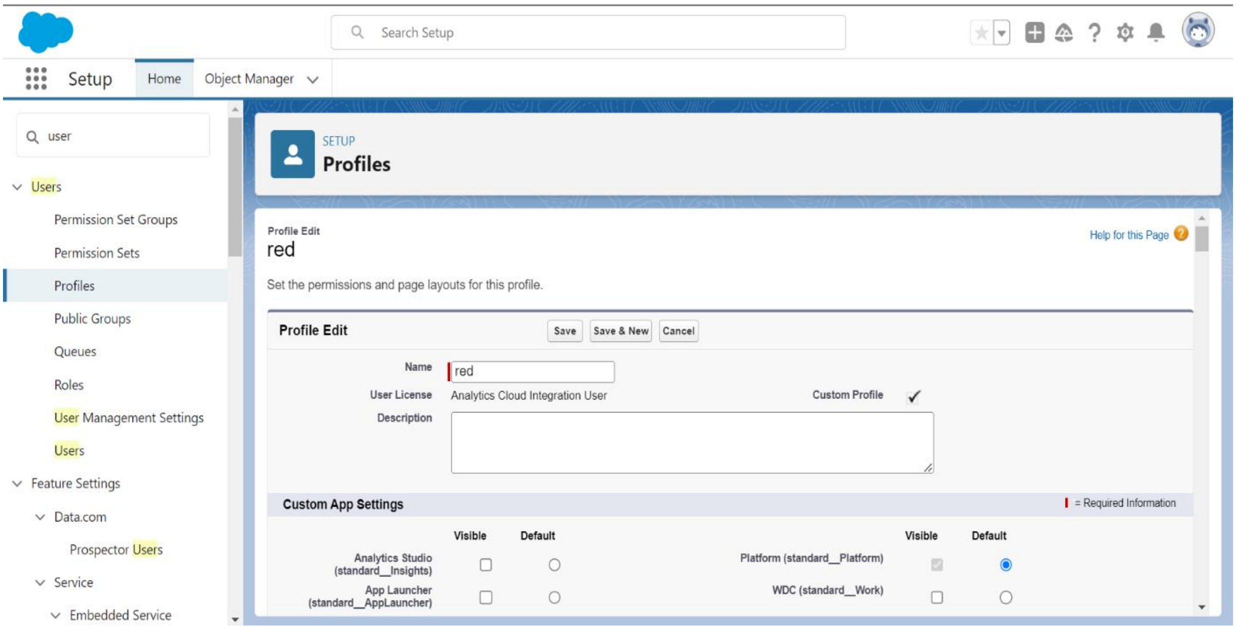
Appointment Invitation
Appointment Invitation Layout
[View Assignment]
Payment Authorization
Payment Authorization Layout
[View Assignment]
Asset
Asset Layout
[View Assignment]
Payment Authorization Adjustment
Payment Authorization Adjustment Layout
[View Assignment]
Asset Relationship
Asset Relationship Layout
[View Assignment]
Payment Gateway
Payment Gateway Layout
[View Assignment]
Assigned Resource
Assigned Resource Layout
[View Assignment]
Payment Gateway Log
Payment Gateway Log Layout
[View Assignment]


Search Setup
Setup
Home
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
Profiles
Public Groups
Queues
Roles
User Management Settings
SETUP
Profiles
Basic Access
Data Administration
Read
Create
Edit
Delete
View All
Modify All
Brokers
Childs
Parents
Properties
Session Settings
Session Times Out After
2 hours of inactivity
Session Security Level Required at Login
--None--
Password Policies
User passwords expire in
90 days
Enforce password history
3 passwords remembered
Minimum password length
8
Password complexity requirement
Must include alpha and numeric characters
Password question requirement
Cannot contain password
Maximum invalid login attempts
10
Lockout effective period
15 minutes
Obscure secret answer for password resets
Require a minimum 1 day password lifetime
Don't immediately expire links in forgot password emails
Save
Save & New
Cancel


Search Setup
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Users
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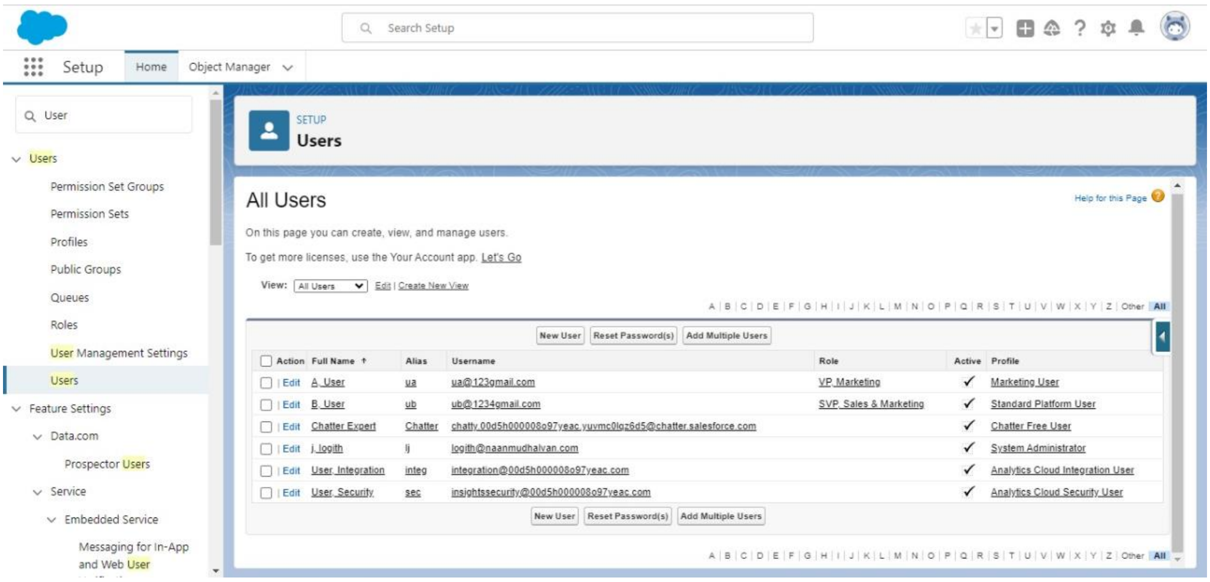
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Feature Settings
Data.com
Prospector Users
Service
Embedded Service
SETUP
Profiles
Profile Edit
red
Help for this Page
Set the permissions and page layouts for this profile.
Profile Edit
Save
Save & New
Cancel
Name
red
User License
Analytics Cloud Integration User
Custom Profile
Description
Custom App Settings
= Required Information
Visible
Default
Analytics Studio (standard__Insights)
App Launcher (standard__AppLauncher)
Platform (standard__Platform)
WDC (standard__Work)


Search Setup
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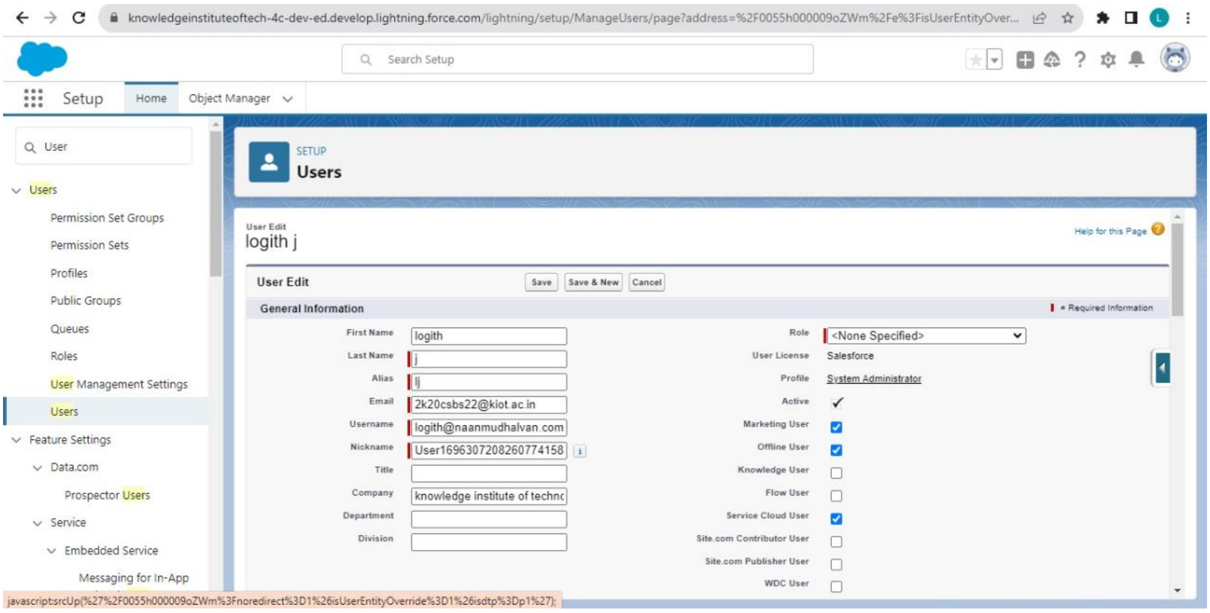
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Feature Settings
Data.com
Prospector Users
Service
Embedded Service
Messaging for In-App and Web User
SETUP
Users
All Users
Help for this Page
On this page you can create, view, and manage users.
To get more licenses, use the Your Account app. Let's Go
View: All Users
Edit | Create New View
New User
Reset Password(s)
Add Multiple Users
Action
Full Name
Alias
Username
Role
Active
Profile
Edit
A, User
ua
ua@123gmail.com
VP, Marketing
Marketing User
B, User
ub
ub@1234gmail.com
SVP, Sales & Marketing
Standard Platform User
Chatter Expert
Chatter
Chatter Free User
j, logith
lj
logith@naanmudhalvan.com
System Administrator
User, Integration
integ
Analytics Cloud Integration User
User, Security
sec
Analytics Cloud Security User


knowledgeinstituteoftech-4c-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F0055h000009oZWm%2Fe%3FisUserEntityOver...
Search Setup
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Profiles
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Queues
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Feature Settings
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Prospector Users
Service
Embedded Service
Messaging for In-App
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Save & New
Cancel
General Information
= Required Information
First Name
logith
Last Name
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lj
Email
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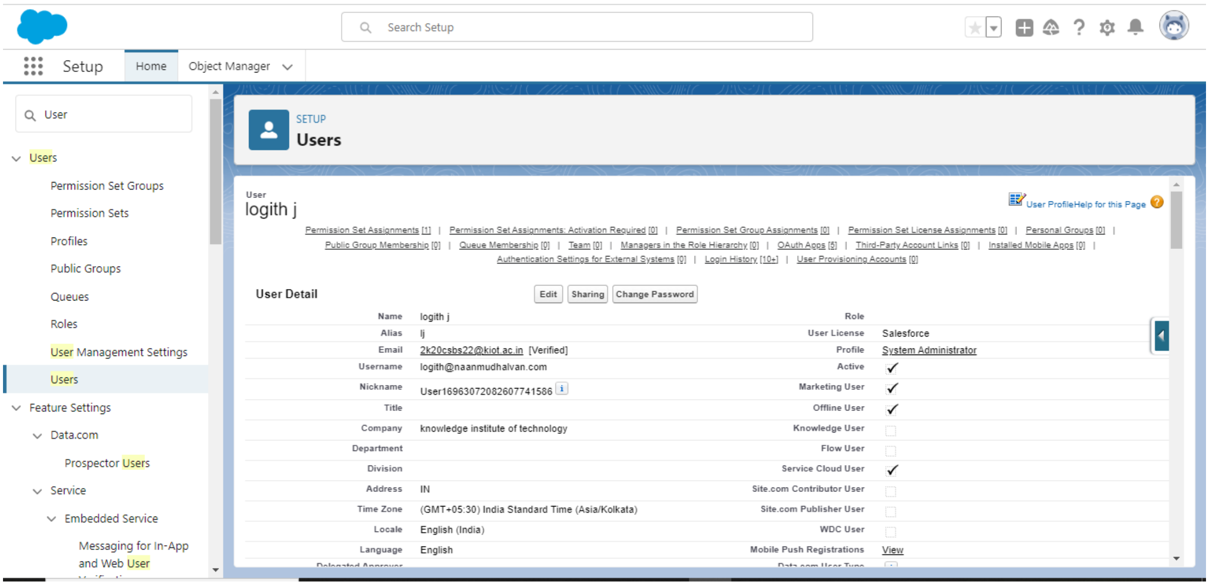
Username
logith@naanmudhalvan.com
Nickname
User1696307208260774158
Title
Company
knowledge institute of techno
Department
Division
Role
<None Specified>
User License
Salesforce
Profile
System Administrator
Active
Marketing User
Offline User
Knowledge User
Flow User
Service Cloud User
Site.com Contributor User
Site.com Publisher User
WDC User
javascript:srcUp(%27%2F0055h000009oZWm%3Fnoredirect%3D1%26isUserEntityOverride%3D1%26isdtp%3Dp1%27);


Search Setup
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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
SETUP
Users
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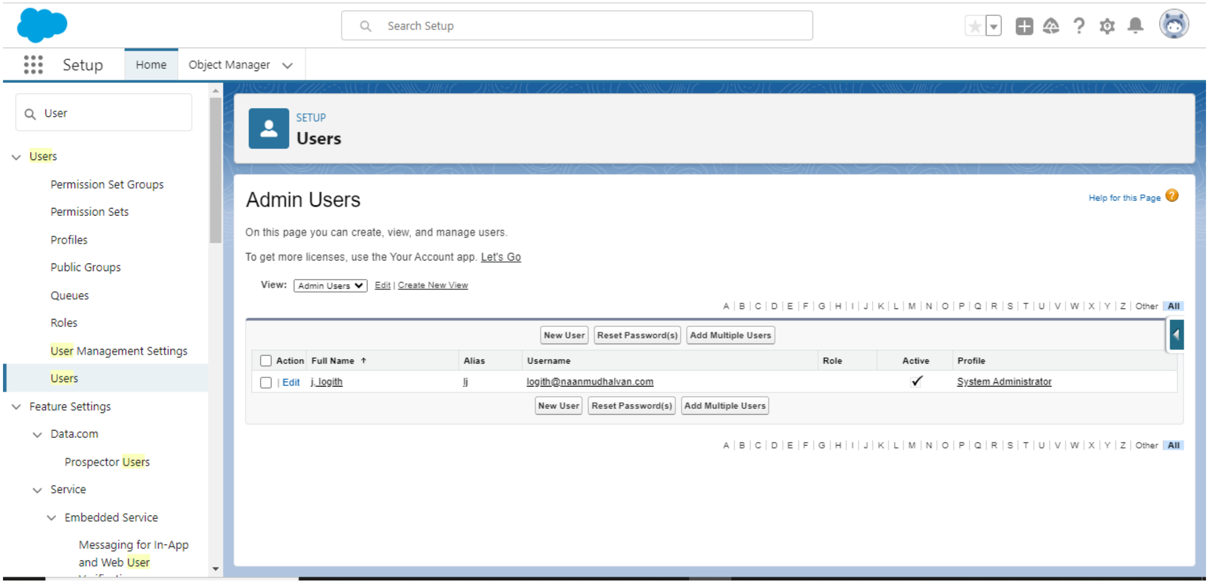
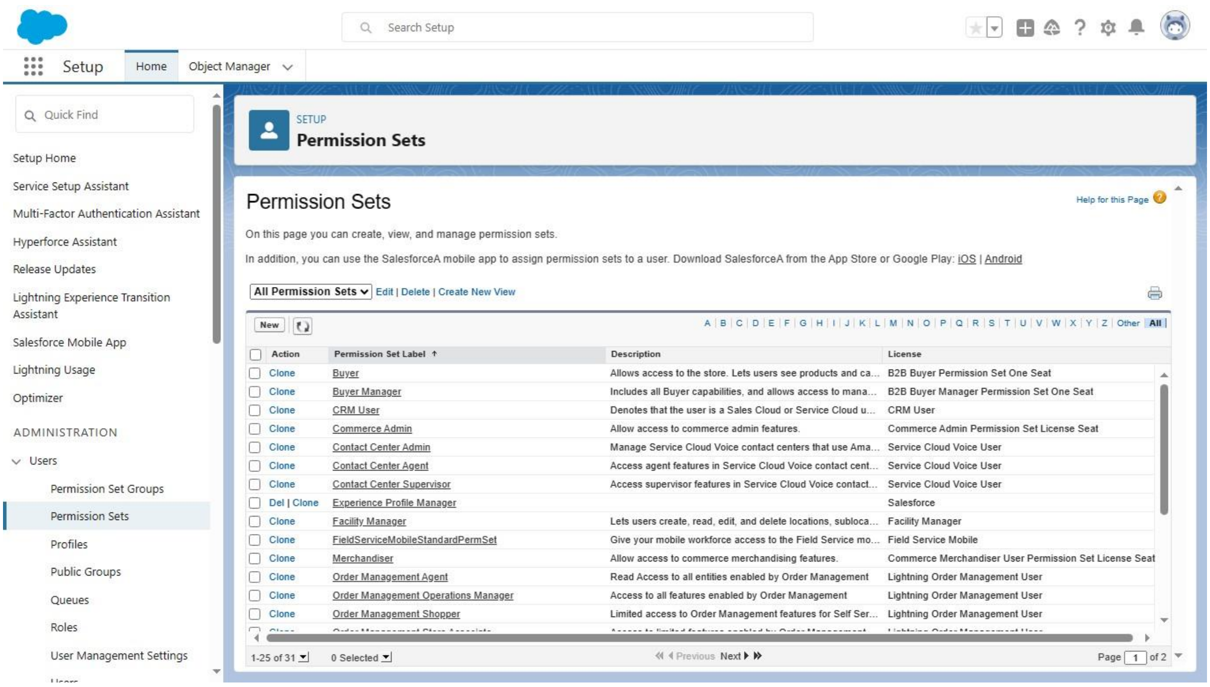
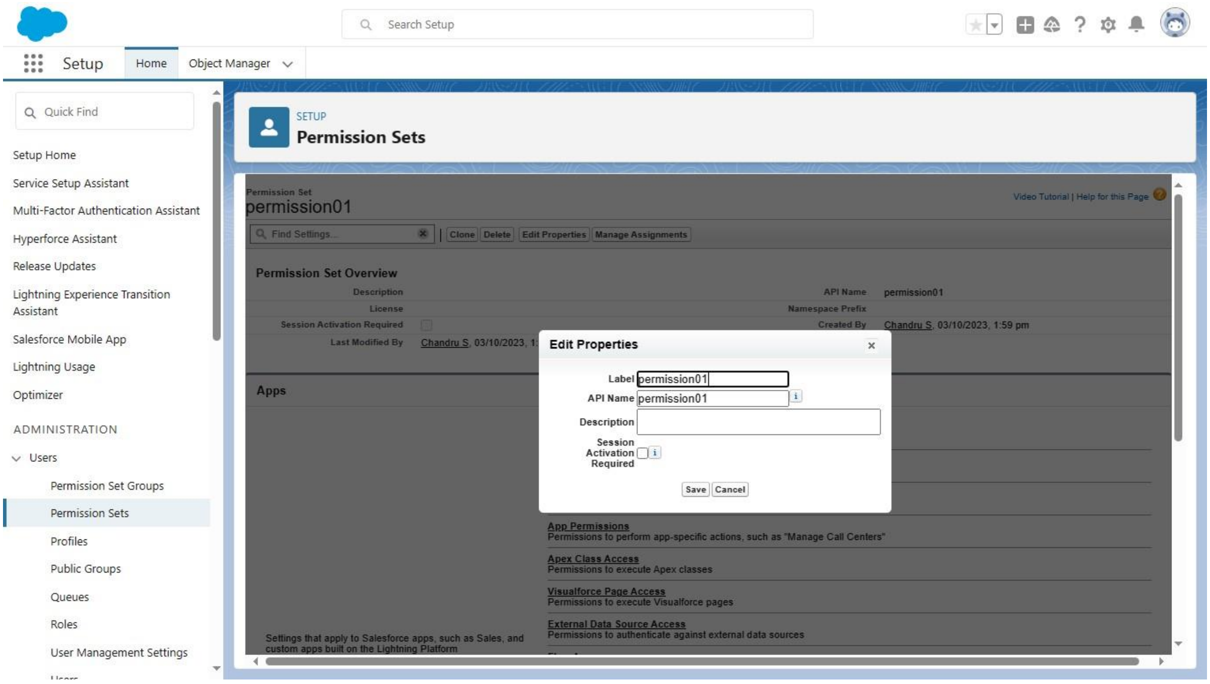
logith j
User Profile
Help for this Page
Permission Set Assignments [1] | Permission Set Assignments: Activation Required [0] | Permission Set Group Assignments [0] | Permission Set License Assignments [0] | Personal Groups [0] |
Public Group Membership [0] | Queue Membership [0] | Team [0] | Managers in the Role Hierarchy [0] | OAuth Apps [6] | Third-Party Account Links [0] | Installed Mobile Apps [0] |
Authentication Settings for External Systems [0] | Login History [10+] | User Provisioning Accounts [0]
User Detail
Edit
Sharing
Change Password
Name
logith j
Alias
lj
Email
2k20csbs22@kiot.ac.in [Verified]
Username
logith@naanmudhalvan.com
Nickname
User16963072082607741586
Title
Company
knowledge institute of technology
Department
Division
Address
IN
Time Zone
(GMT+05:30) India Standard Time (Asia/Kolkata)
Locale
English (India)
Language
English
Role
User License
Salesforce
Profile
System Administrator
Active
Marketing User
Offline User
Knowledge User
Flow User
Service Cloud User
Site.com Contributor User
Site.com Publisher User
WDC User
Mobile Push Registrations
View



Step 2: Assign the Permission Set to the User Needing Delete Access

1. In the "Permission Set Detail" page, click on "Manage Assignments."
2. Click "Add Assignments" and select the user who needs delete access.
3. Save the assignment.




Search Setup
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Multi-Factor Authentication Assistant
Hyperforce Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
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Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
SETUP
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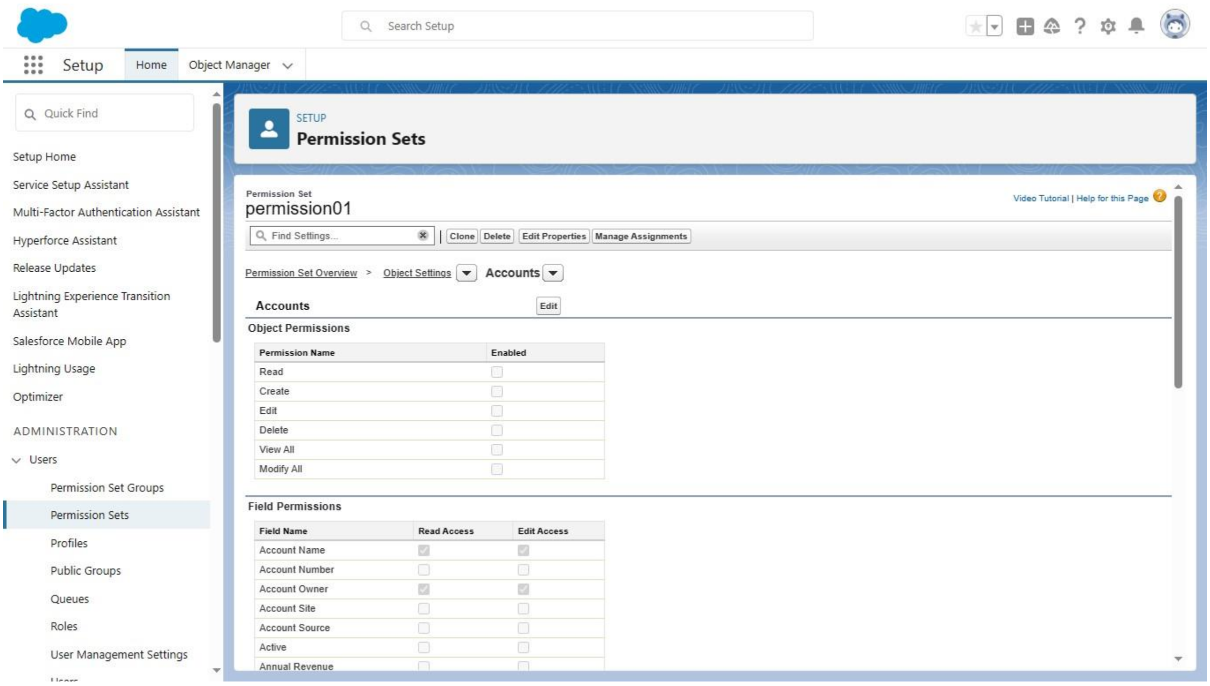
Permission Set
permission01
Video Tutorial | Help for this Page
Find Settings...
Clone
Delete
Edit Properties
Manage Assignments
Permission Set Overview
Description
License
Session Activation Required
Last Modified By
API Name
permission01
Namespace Prefix
Created By
Chandru S, 03/10/2023, 1:59 pm
Edit Properties
Label
permission01
API Name
permission01
Description
Session Activation Required
Save
Cancel
Apps
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
Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform


Search Setup
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Multi-Factor Authentication Assistant
Hyperforce Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
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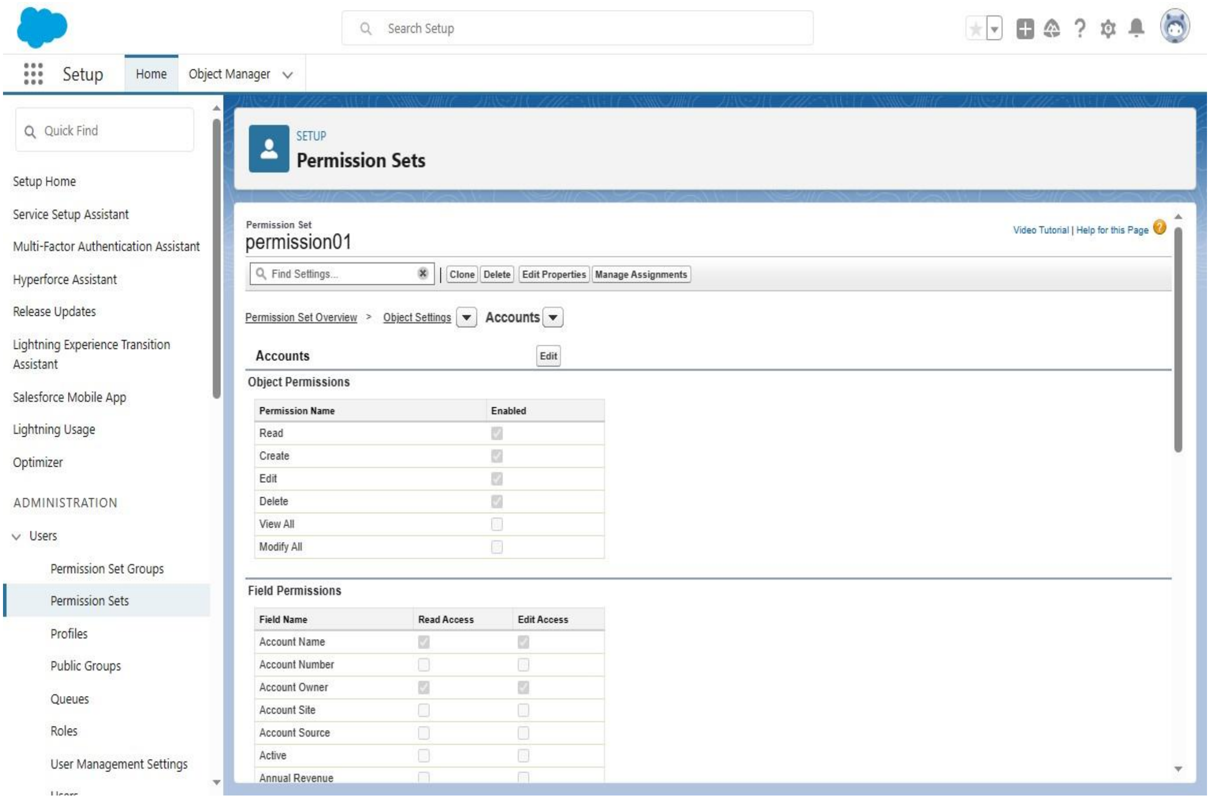
User Management Settings
SETUP
Permission Sets
Permission Set
permission01
Video Tutorial | Help for this Page
Find Settings...
Clone
Delete
Edit Properties
Manage Assignments
Permission Set Overview > Object Settings
Accounts
Accounts
Edit
Object Permissions
Permission Name
Enabled
Read
Create
Edit
Delete
View All
Modify All
Field Permissions
Field Name
Read Access
Edit Access
Account Name
Account Number
Account Owner
Account Site
Account Source
Active
Annual Revenue


Search Setup
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Release Updates
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Salesforce Mobile App
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Users
Permission Set Groups
Permission Sets
Profiles
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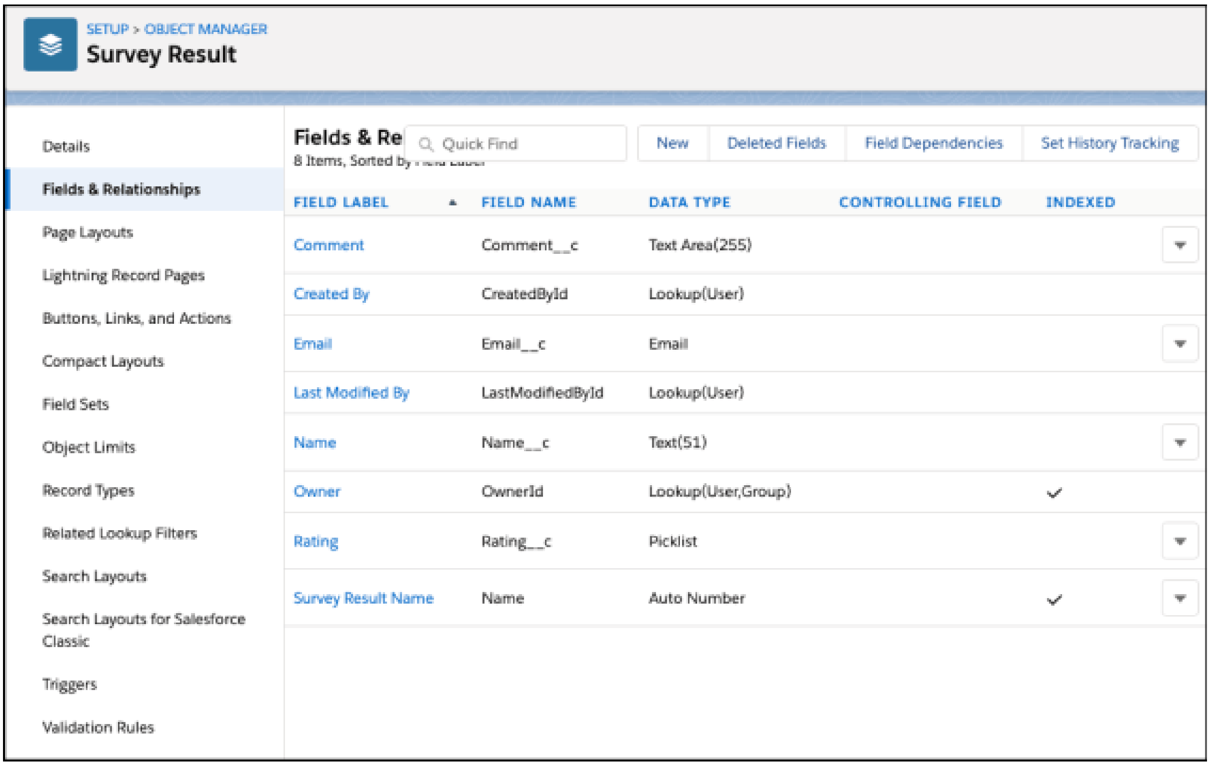
Roles
User Management Settings
SETUP
Permission Sets
Permission Set
permission01
Video Tutorial | Help for this Page
Find Settings...
Clone
Delete
Edit Properties
Manage Assignments
Permission Set Overview > Object Settings
Accounts
Accounts
Edit
Object Permissions
Permission Name
Enabled
Read
Create
Edit
Delete
View All
Modify All
Field Permissions
Field Name
Read Access
Edit Access
Account Name
Account Number
Account Owner
Account Site
Account Source
Active
Annual Revenue


Assignment Summary


Assignment Summary

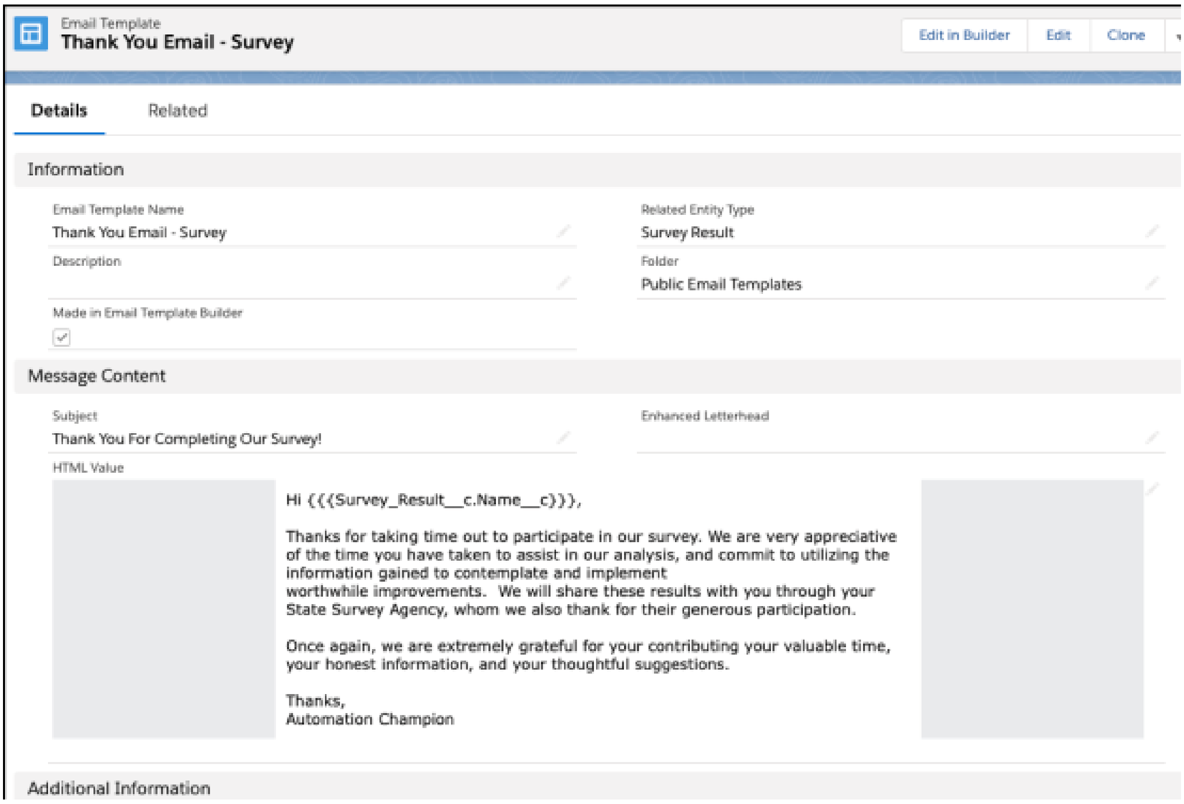
4.Create a screen flow for a basic survey to fill in the details for any form.

Step 1: Create a custom object
1.Click Setup.
2.In the Object Manager, click Create | Custom Object.
3.Now create a custom object Survey Result and fields as shown in the screenshot below:
4. Click Save.



Step 2: Create a Thank You For Survey Lightning Email Template

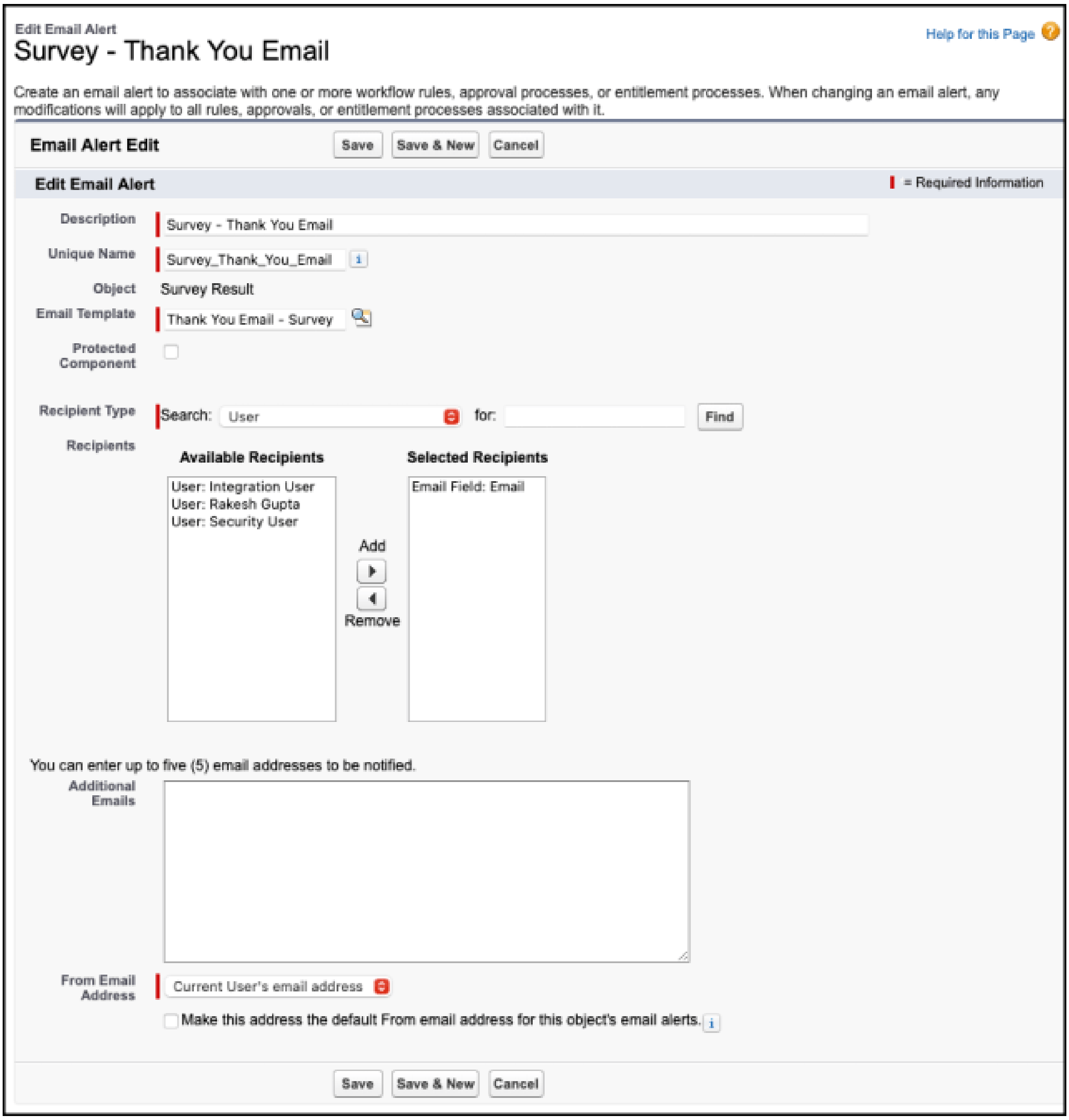
1.Click App Launcher.
2.In the Quick Find box, type Email Templates.
3.Clicks on the New Email template button.
4.Name the Lightning Email Template and make sure to store it in the Public Email Templates folder.
5.Create a template like the following screenshot



Step 3: Create an Email Alert

1.Click Setup.
2.In the Quick Find box, type Email Alerts.
3.Select Email Alerts, click on the New Email Alert button.
4.Name the Email Alert and click the Tab button. The Unique Name will populate.
5.For Object select Survey Result.
6.For the Email Template chooses Lightning Email Template Thank You Email – Survey.
7.For Recipient Type select Email Field: Email.

8.Click Save.



Step 4.1: Salesforce Flow – Create a Screen that Allow Users to Fill Survey

1.Click Setup.

2.In the Quick Find box, type Flows.

3.Select Flows then click on the New Flow.

4.Select the Screen Flow option and click on Next and configure the flow as follows:

5.How do you want to start building: Freeform

6.We will use the Screen element to capture a Survey response form. Drag and drop a Screen element onto the canvas.

Step 4.2: Salesforce Flow – Add a Record Creates Element to Save Survey Response

1.Drag-and-drop the Create Records element onto the Flow designer.
2.Enter a name in the Label (Save Response) field; the API Name will auto-populate.
3.For How Many Records to Create – select One.
4.For How to Set the Record Fields – select Use separate resources, and literal values.
5.Select the Survey_Result__c object from the dropdown list.
6.Set Field Values for the Survey Result

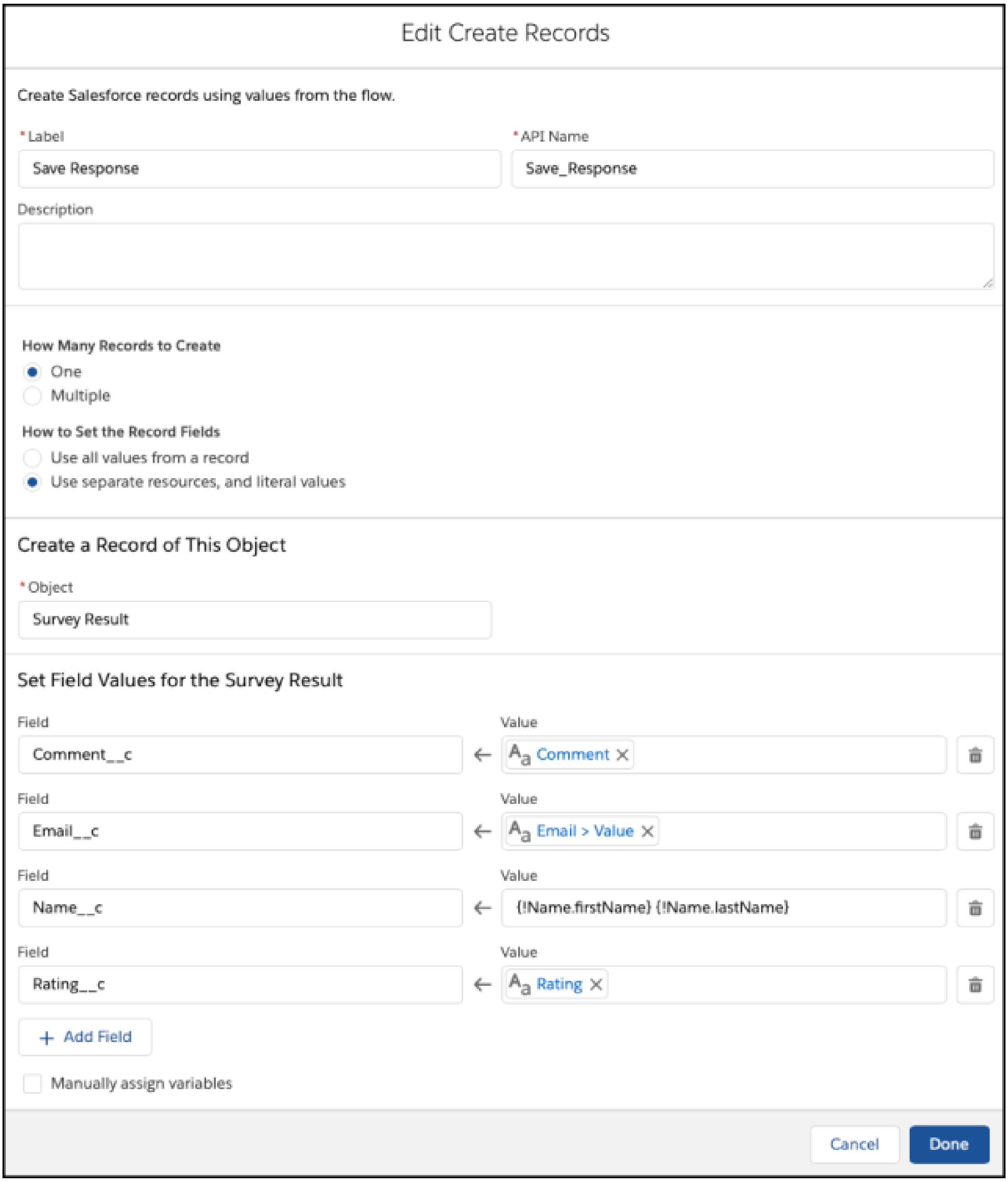
Row 1:
Field: Comment__c
Value: {!Comment}
Click Add Row

Row 2:
Field: Email__c
Value: {!Email.value}
Click Add Row

Row3:
Field: Name__c
Value: {!Name.firstName} {!Name.lastName}
Click Add Row

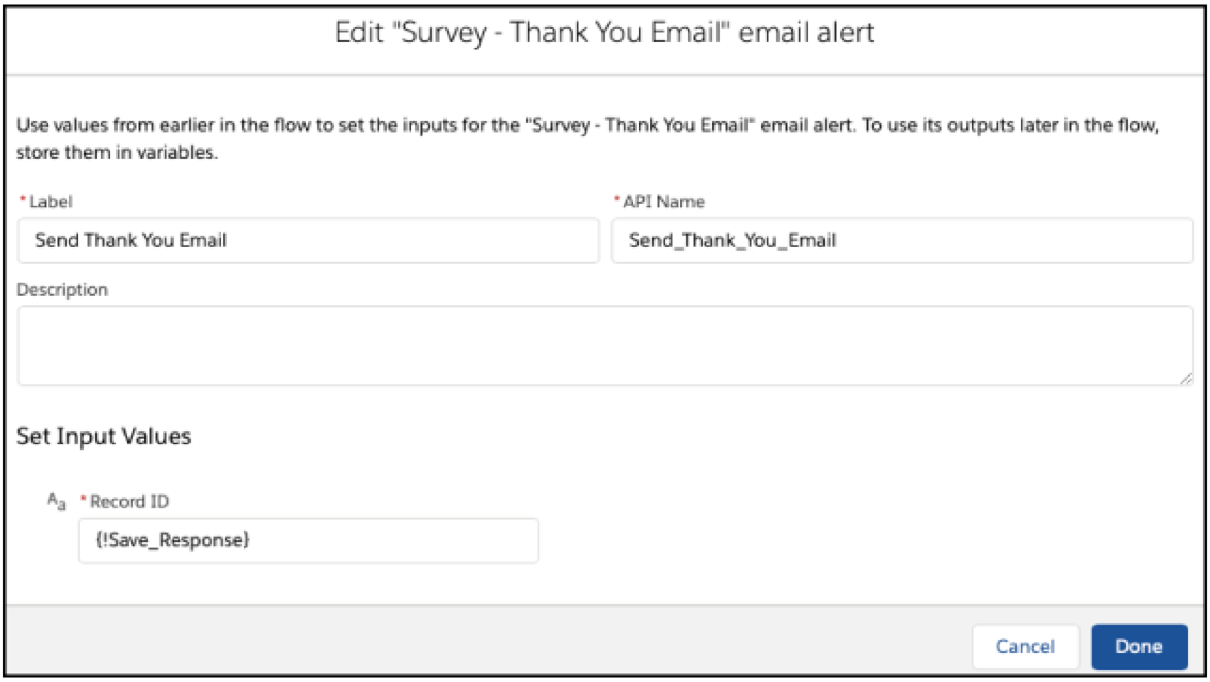
Row 3:
Field: Rating__c
Value: {!Rating}

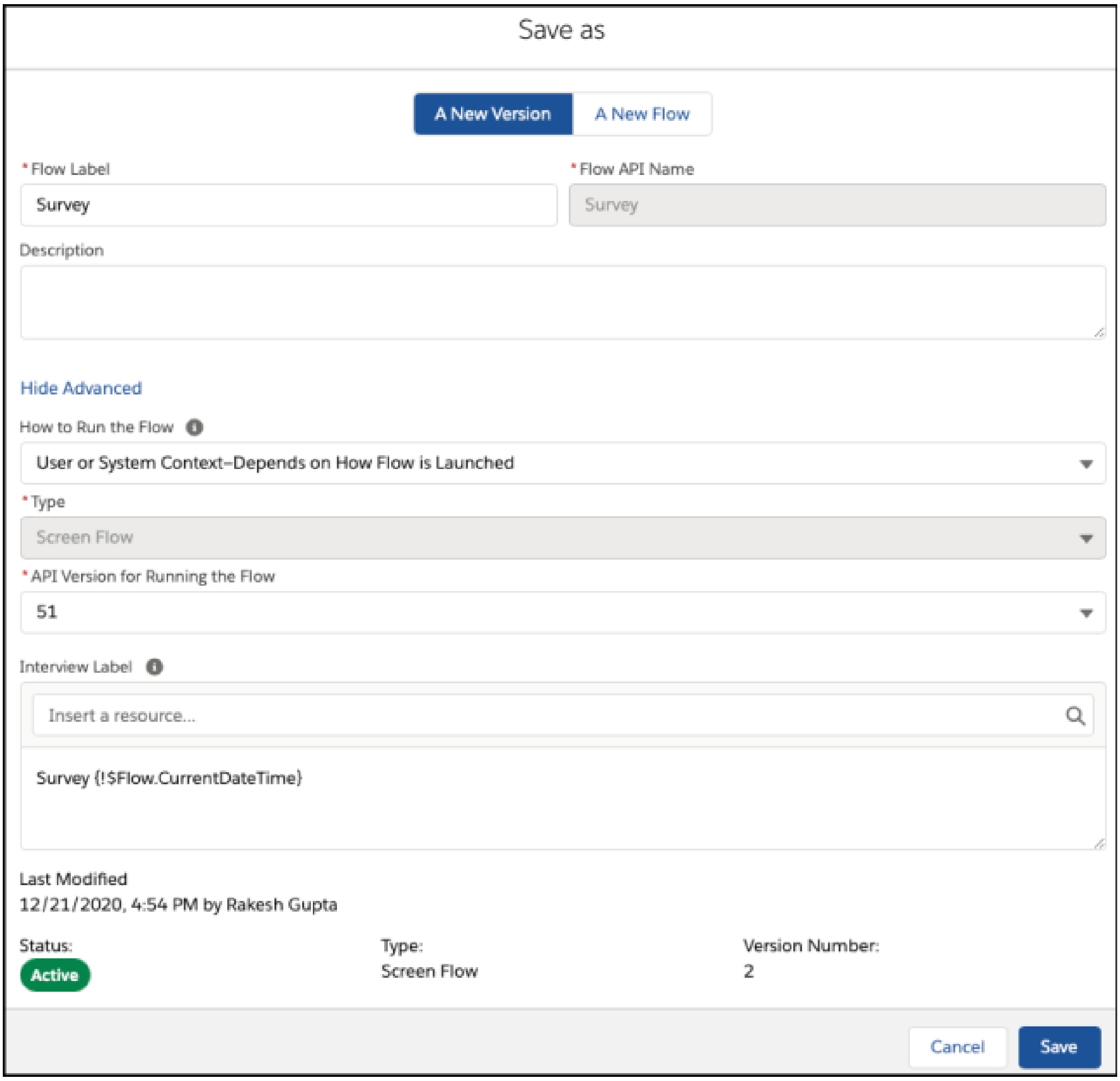
7.Click Done.



Step 4.3: Salesforce Flow – Call an Acton – Email Alert to Send Out Thank You Email

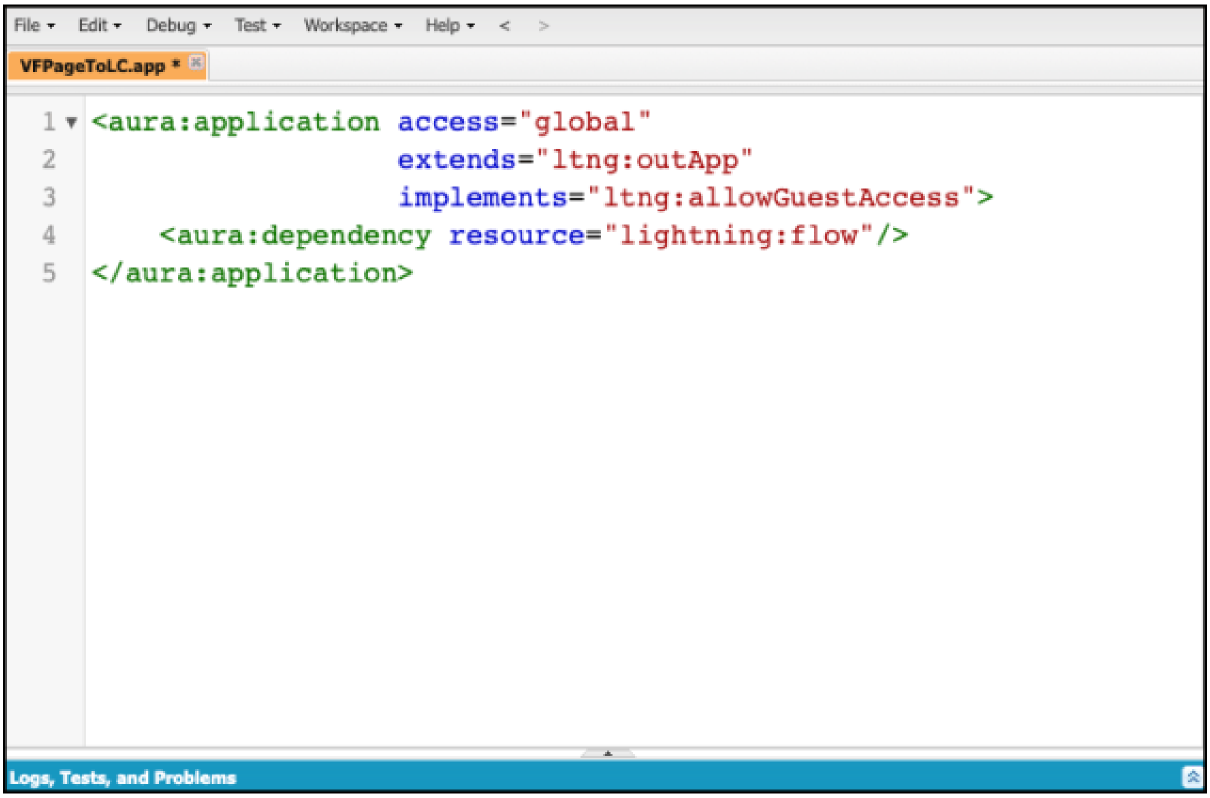
1.Under Toolbox, select Element.
2.Drag-and-drop Action element onto the Flow designer.
3.In the Action box, type Survey – Thank You Email.
4.Clicks on the Survey – Thank You Email email alert.
5.Click Done.

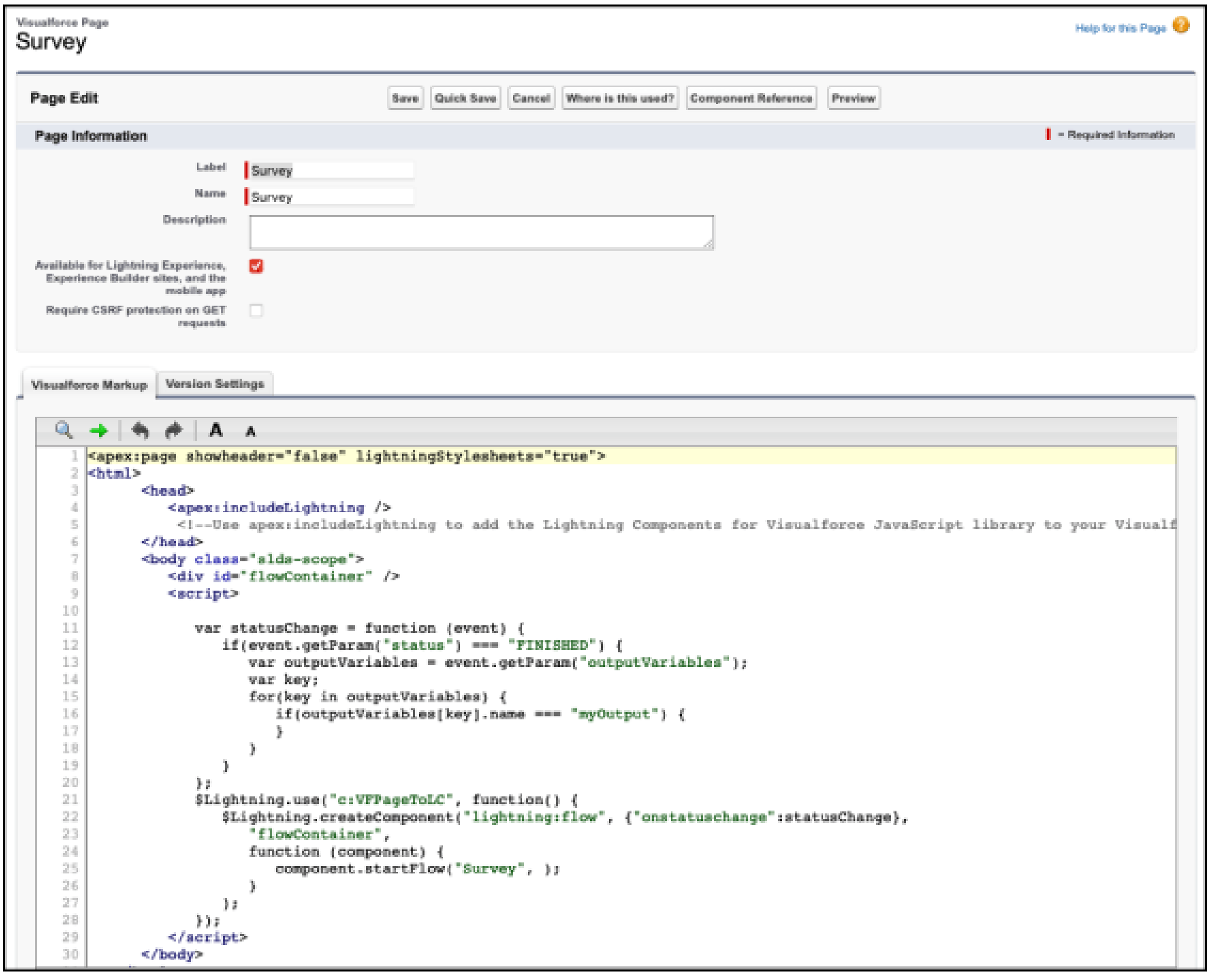

Edit "Survey - Thank You Email" email alert
Use values from earlier in the flow to set the inputs for the "Survey - Thank You Email" email alert. To use its outputs later in the flow, store them in variables.
* Label
Send Thank You Email
* API Name
Send_Thank_You_Email
Description
Set Input Values
* Record ID
{!Save_Response}
Cancel
Done



Step 5: Create a Lightning Application to Render Lightning Runtime for Flow in a Visualforce Page

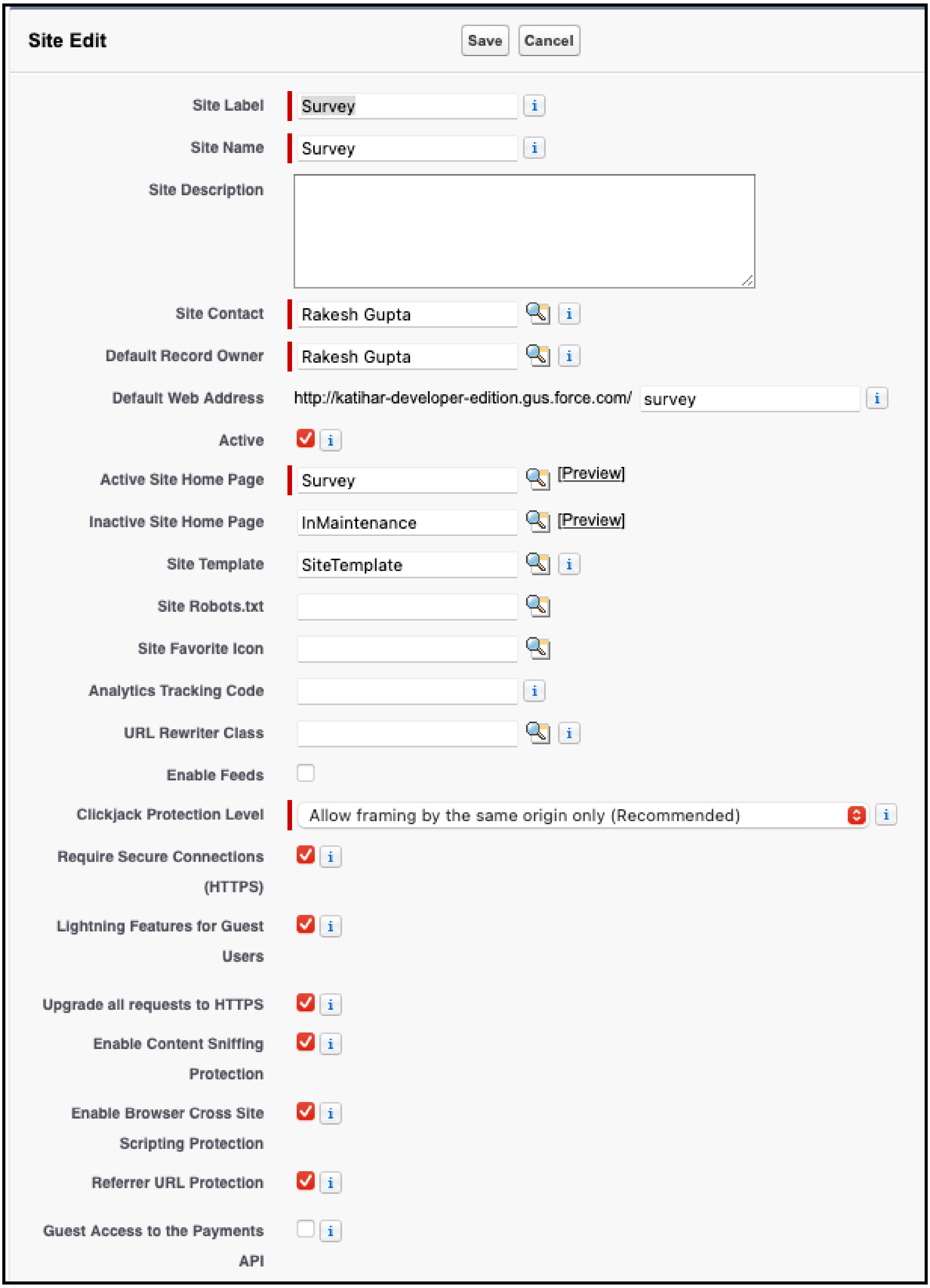
Now we will create a Lightning Application that declares a dependency on the lightning:flow component.
1.Click Setup | Developer Console
2.Navigate to File | New | Lightning Application
3.Enter a Name (VFPageToLC) field, make sure to select the Lightning Out Dependency App checkbox.
4.Click Submit.
5.Copy code from GitHub and paste it into your Lightning Application.
6.Save your code.


File Edit Debug Test Workspace Help
VFPageToLC.app *
<aura:application access="global"
extends="ltng:outApp"
implements="ltng:allowGuestAccess">
<aura:dependency resource="lightning:flow"/>
</aura:application>
Logs, Tests, and Problems



Step 7: Create a Force.com Site to Open Your Flow for Unauthenticated Access

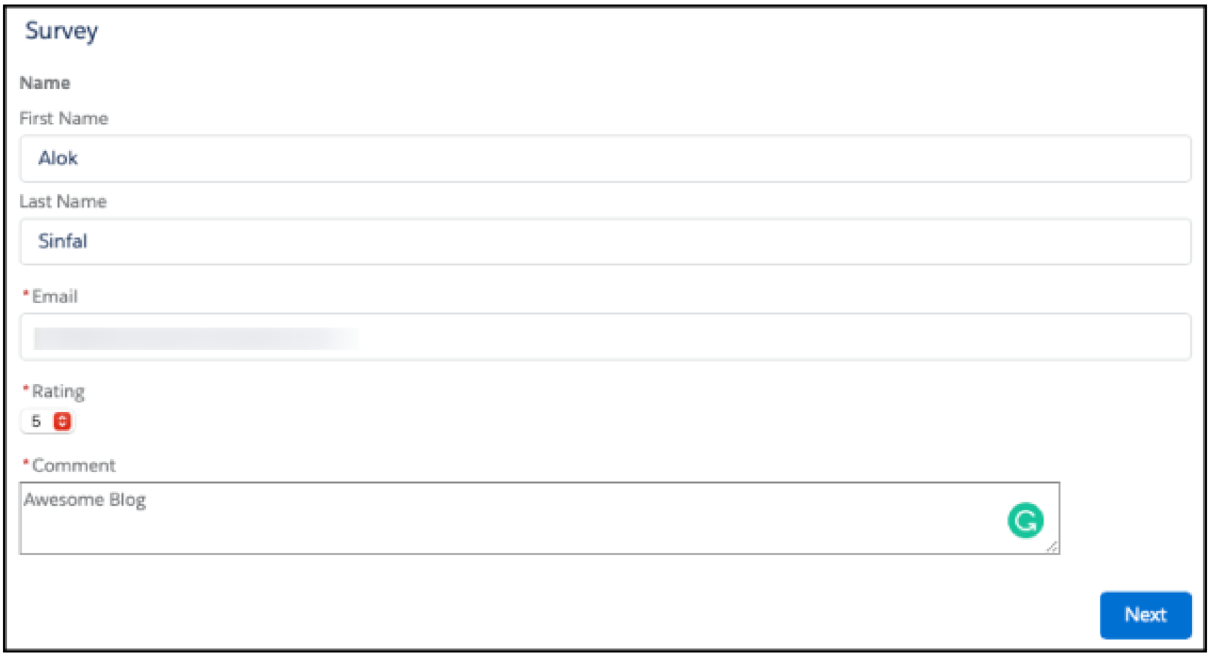
Now we will create a site to open the flow for unauthenticated access.
1.Click Setup.
2.In the Quick Find box, type Sites.
3.Clicks on the New button.
4.Fill the details as per the screenshot below:
5.Click Save.



Under site, Public Access Settings make sure that guest users have Create access on Survey Result object and Edit on the fields.

Proof of Concept

Now onward, if someone opens the site url and fills the form:



After successful submission, he/she will receive an email.

Row 1:

Field: Comment__c

Value: {!Comment}

Click Add Row

Row 2:

Field: Email__c

Value: {!Email.value}

Click Add Row

Row 3:

Field: Name__c

Value: {!Name.firstName} {!Name.lastName}

Click Add Row

Row 3:

Field: Rating__c

Value: {!Rating}

Click Done.