Naan Mudhalvan Salesforce Developer (Course)

Assignment no 1

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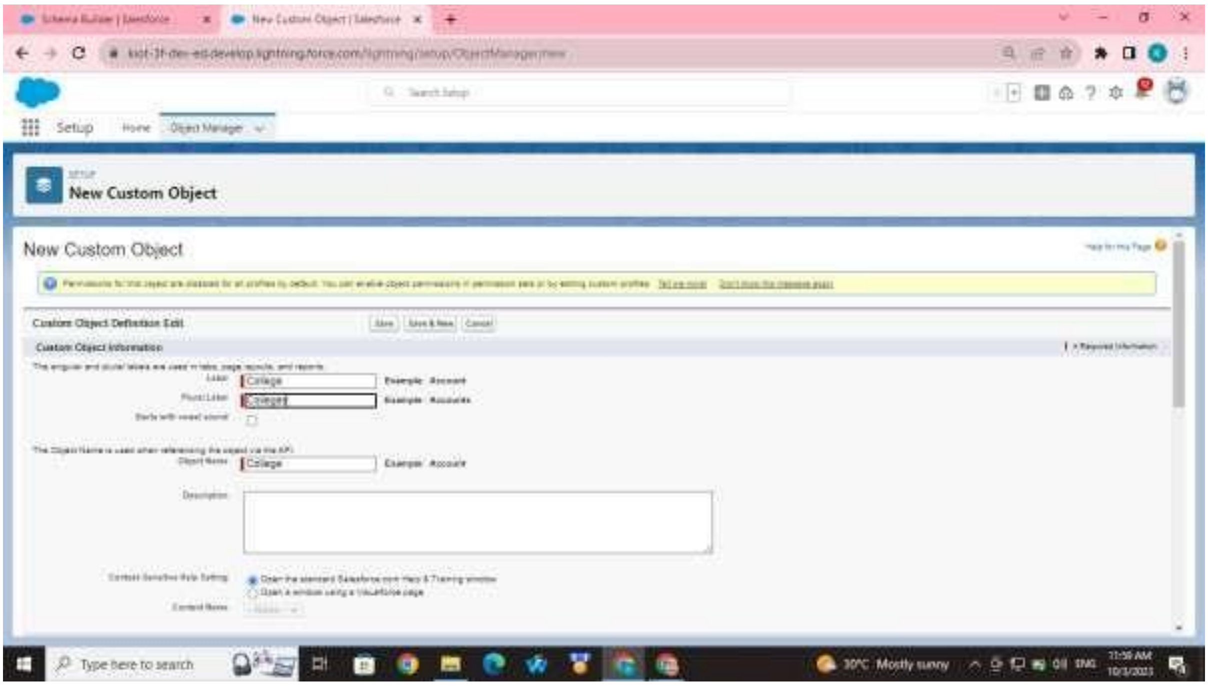
Year & Dep : 4th year & IT
Batch : 2024
Zone no : Zone 8

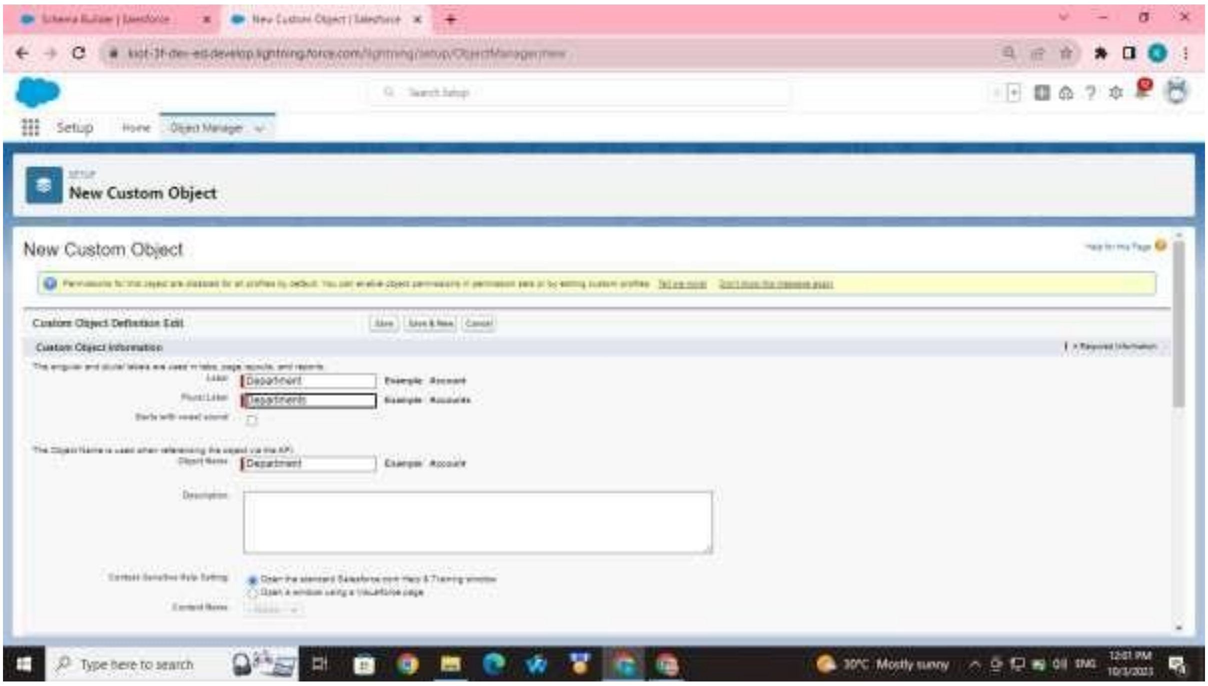
1.Create a Master-Detail Relationship between two Custom objects and also create a Roll Up Summary Field to Calculate total number of records.

Solution:
Step 1: Create Custom Objects

Assuming you have two custom objects, let's call them "College" and " Department". If you haven't already created these objects, you can do so by going to Setup > Object Manager > Create > Custom Object.



Second custom objects, let's call them "Department"



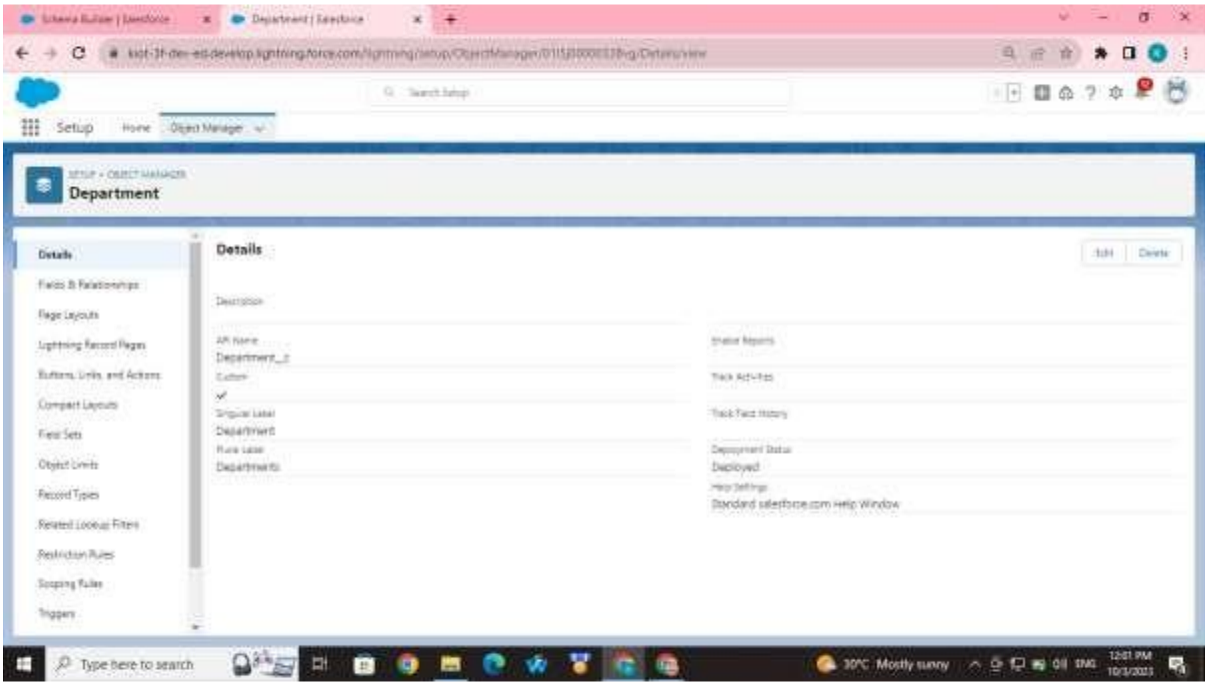
Step 2: Create a Master-Detail Relationship

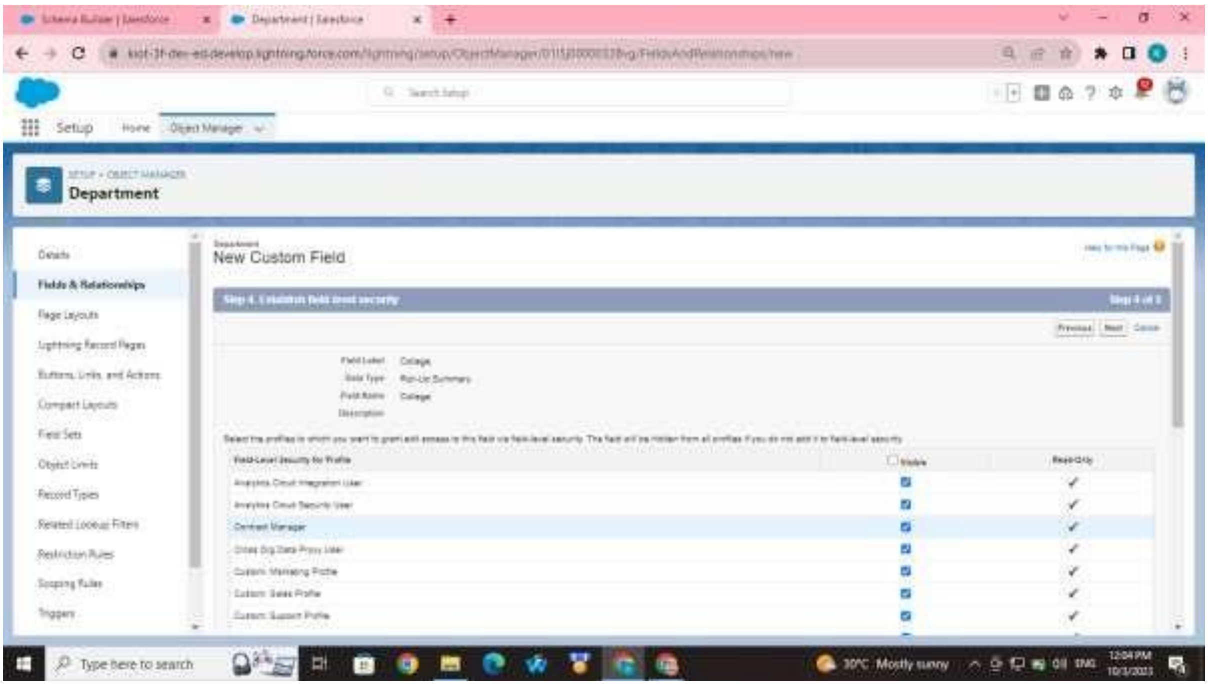
To create a Master-Detail relationship between these two custom objects, follow these steps:

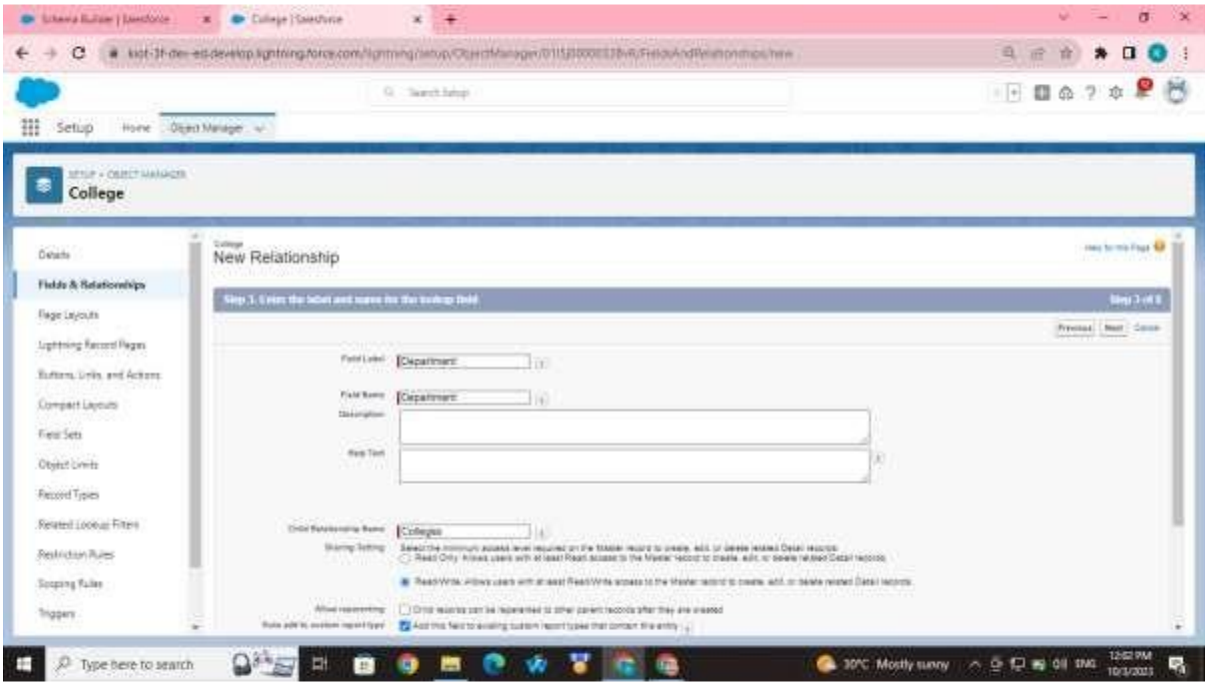
1. Go to Setup > Object Manager.
2. Click on "College" to open its settings.
3. In the left sidebar, click on "Fields & Relationships."
4. Click the "New" button to create a new custom field.
5. Choose "Master-Detail Relationship" as the data type.

6. Enter a label for the relationship, e.g., "Department."
7. Choose " Department " as the related object.
8. Configure other settings as needed and click "Next."
9. Specify the field-level security and add it to relevant page layouts.

10. Click "Next" and "Save" to create the relationship.





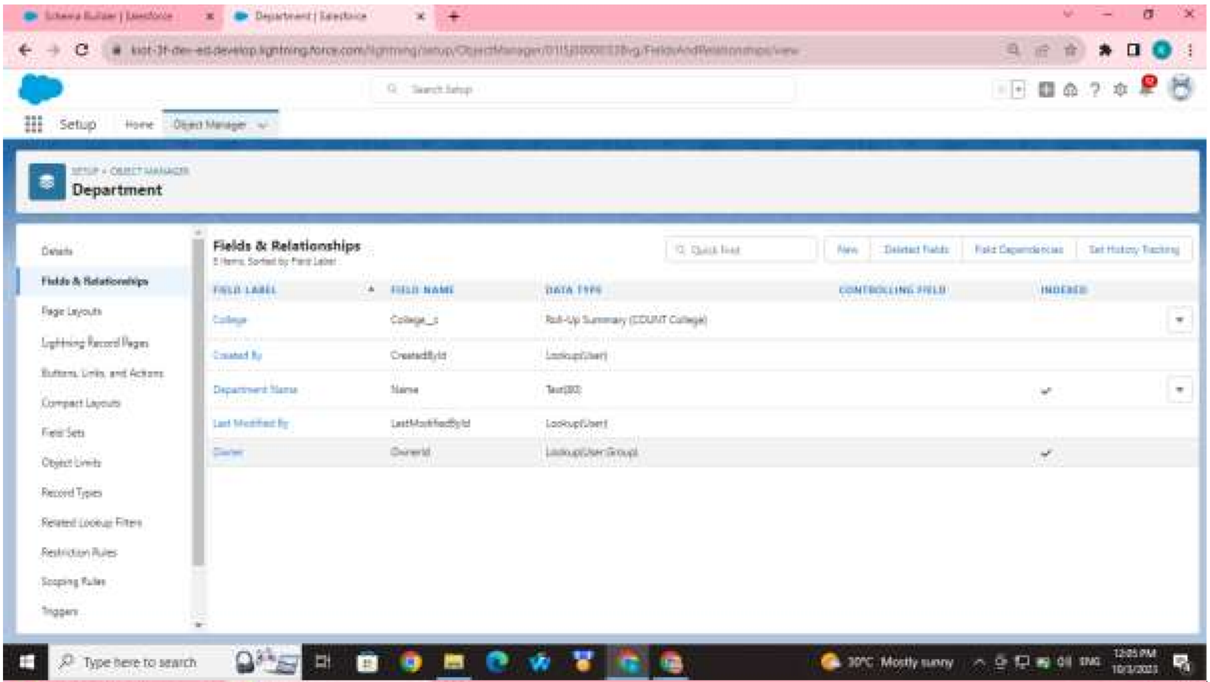


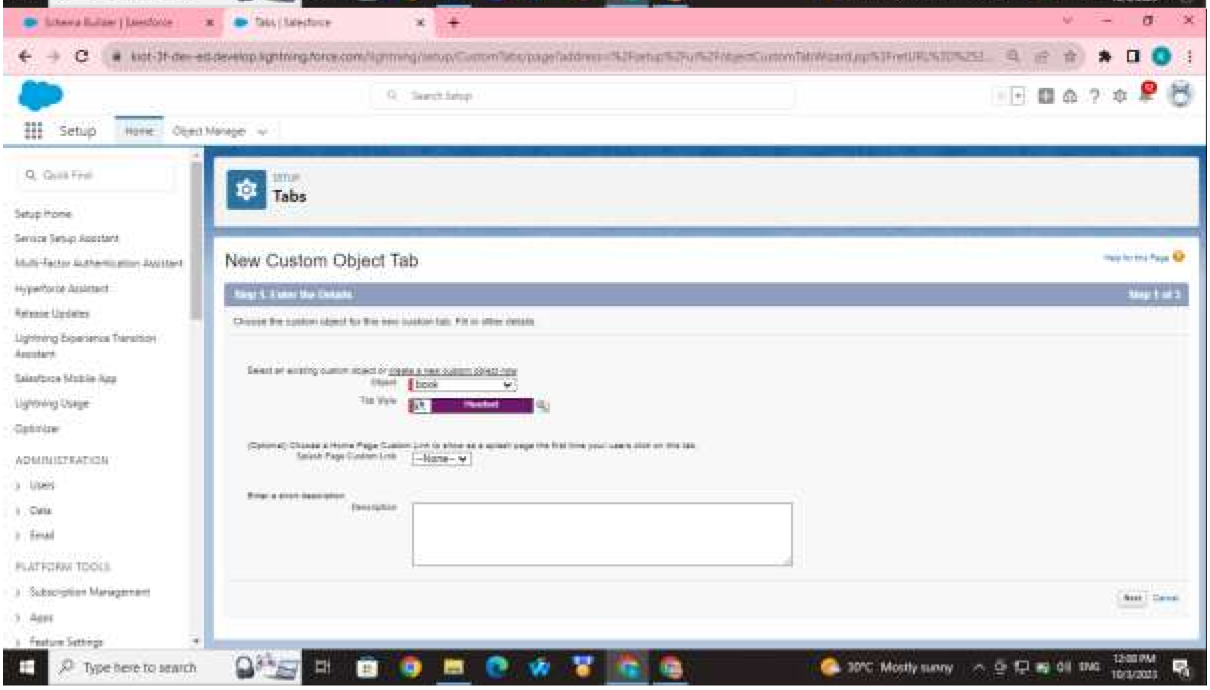
Step 3: Create the Roll-Up Summary Field

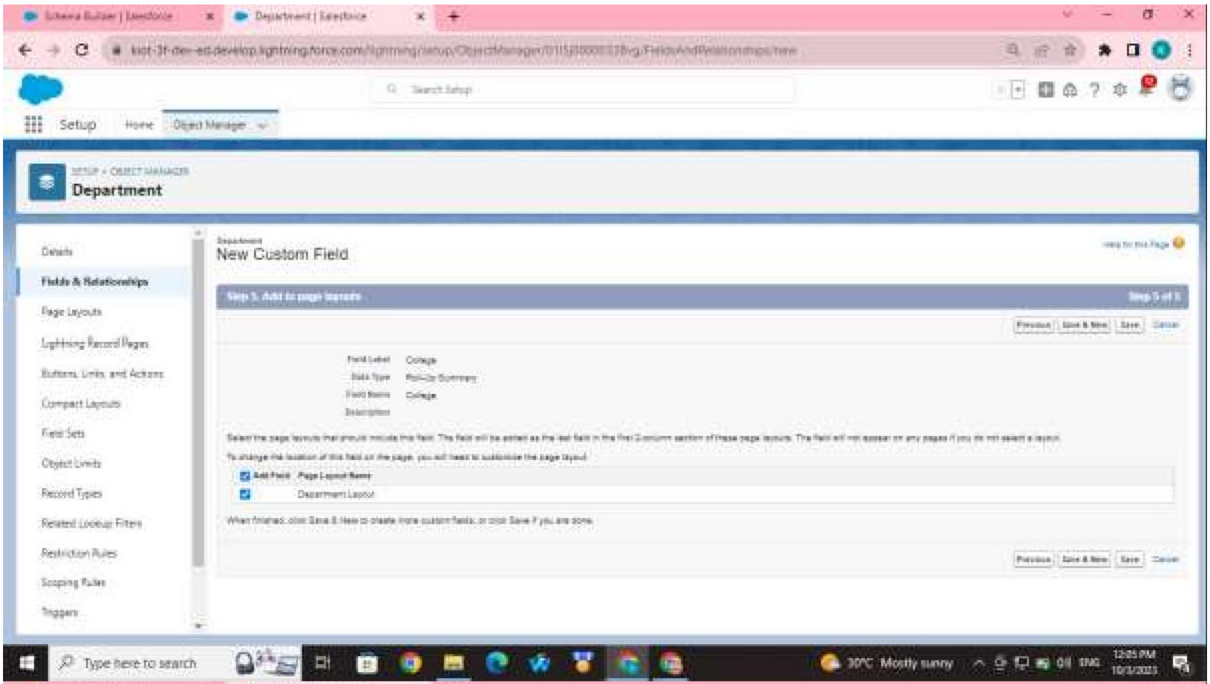
Now, let's create a Roll-Up Summary Field on the "College" to calculate the total number of related records in "Department":

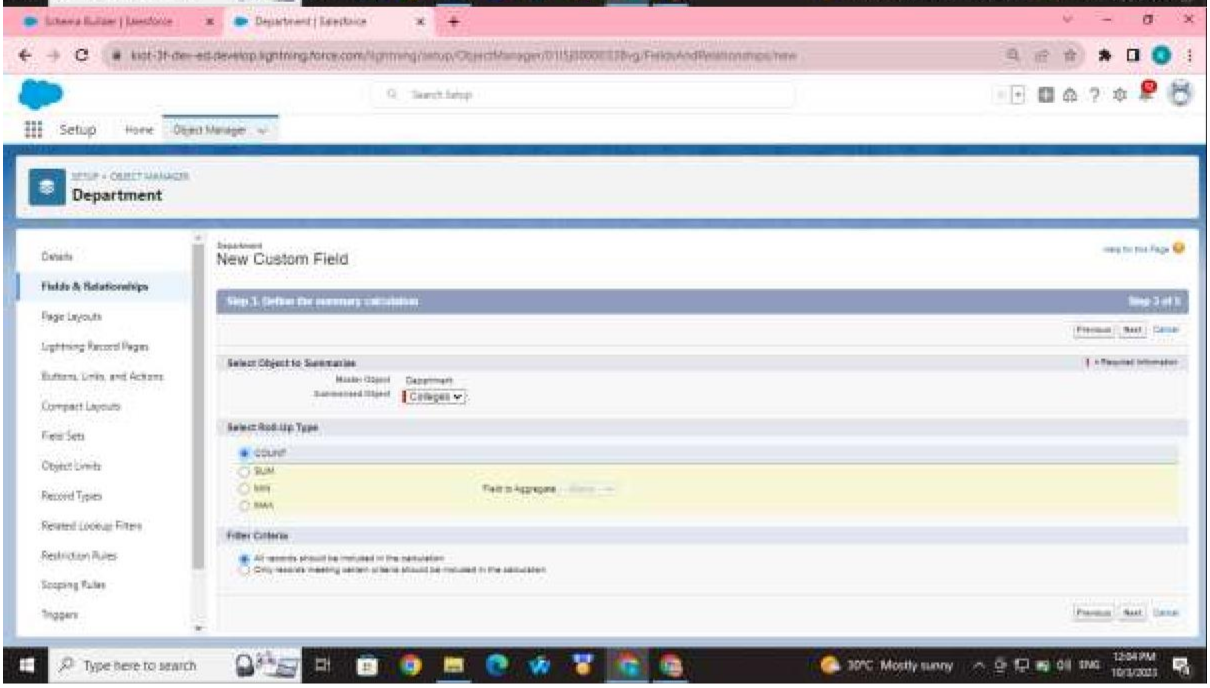
1. **Still on the "College" settings, go to "Fields & Relationships."**
2. **Click the "New" button to create a new custom field.**
3. **Choose "Roll-Up Summary" as the data type.**
4. **Enter a label for the field, e.g.,**
5. **Choose "Count" as the Roll-Up Type.**
6. **Select " Department" as the object to roll up information from.**
7. **Specify the filter criteria if you want to filter the related records.**
8. **Configure other settings as needed and click "Next."**
9. **Specify the field-level security and add it to relevant page layouts.**

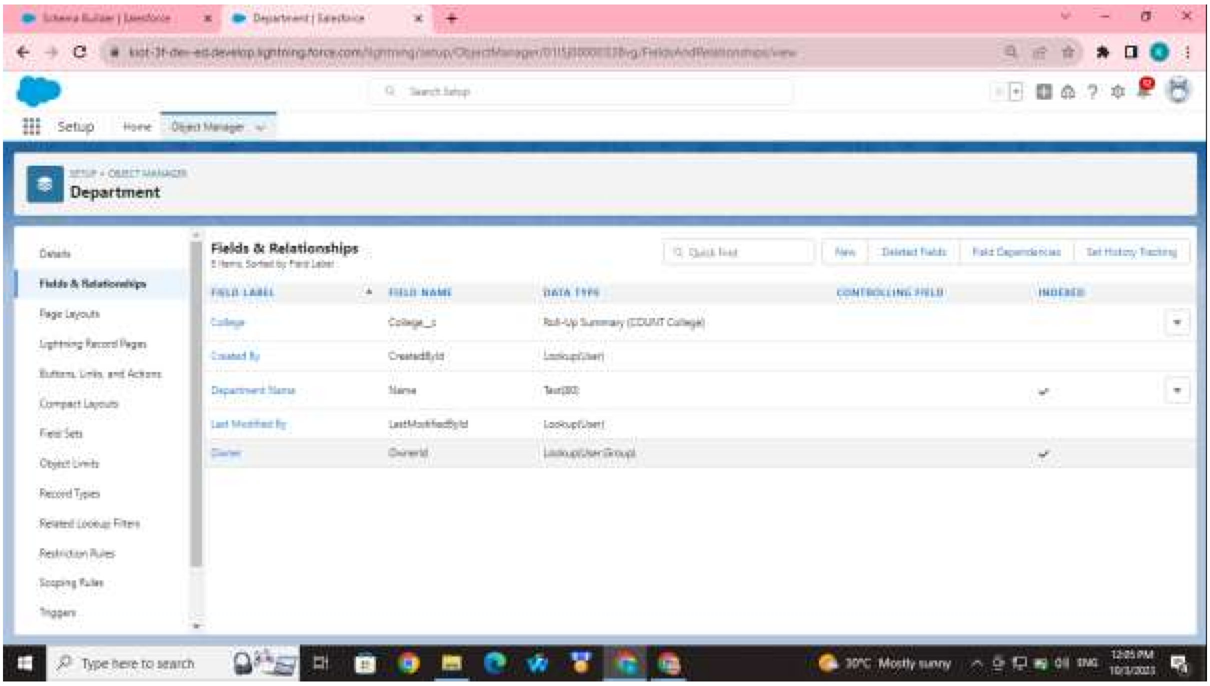
10. Click "Next" and "Save" to create the Roll-Up Summary Field.


Department
Fields & Relationships
FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIELD
INDEXED
College
Roll-Up Summary (COUNT College)
Created By
CreatedById
Lookup(User)
Department Name
Name
LastModifiedById
Owner
OwnerId
Lookup(User,Group)


Tabs
New Custom Object Tab
Description





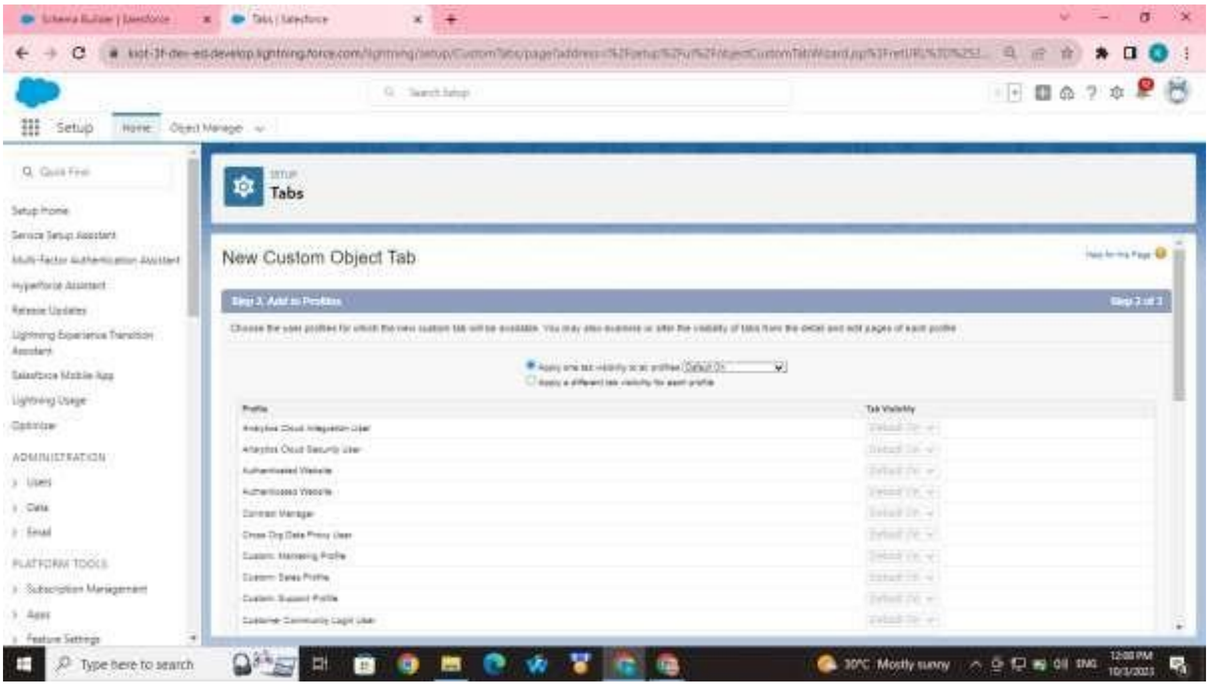


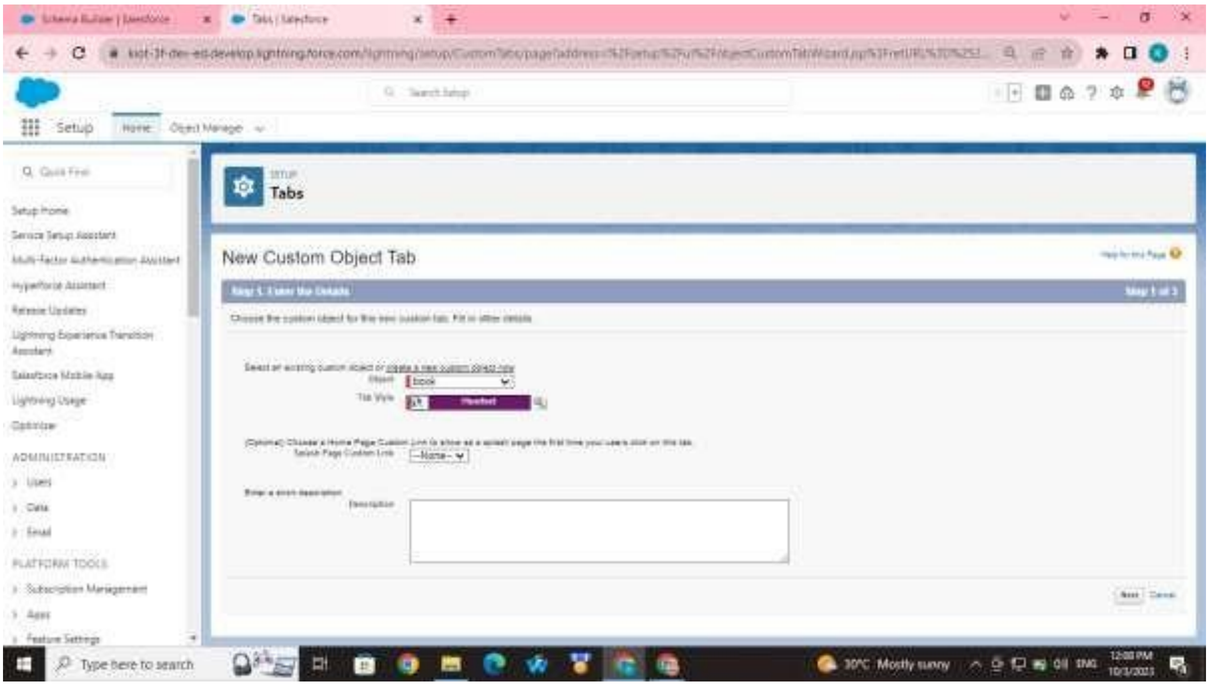
Step 4: Create a Lightning App

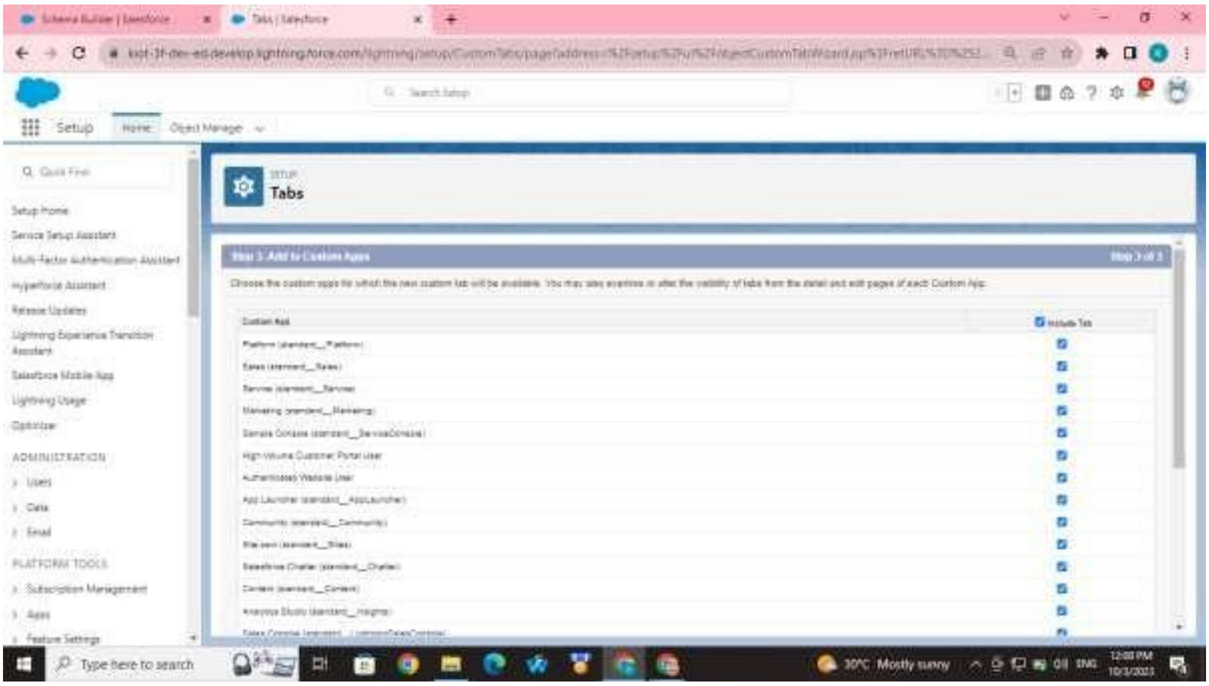
1. **Type and select "App Manager."**
2. **Click "New Lightning App."**
3. **Fill in basic information (Name, Developer Name, Description).**
4. **Choose the App Type (Standard, Console, Custom).**
5. **Customize the Logo and Colour Scheme.**
6. **Configure Navigation Items (objects to appear in the app's menu).**
7. **Set the App Visibility (default access).**
8. **Optionally, choose Record Pages (Lightning Record Pages).**
9. **Review and Save the app.**

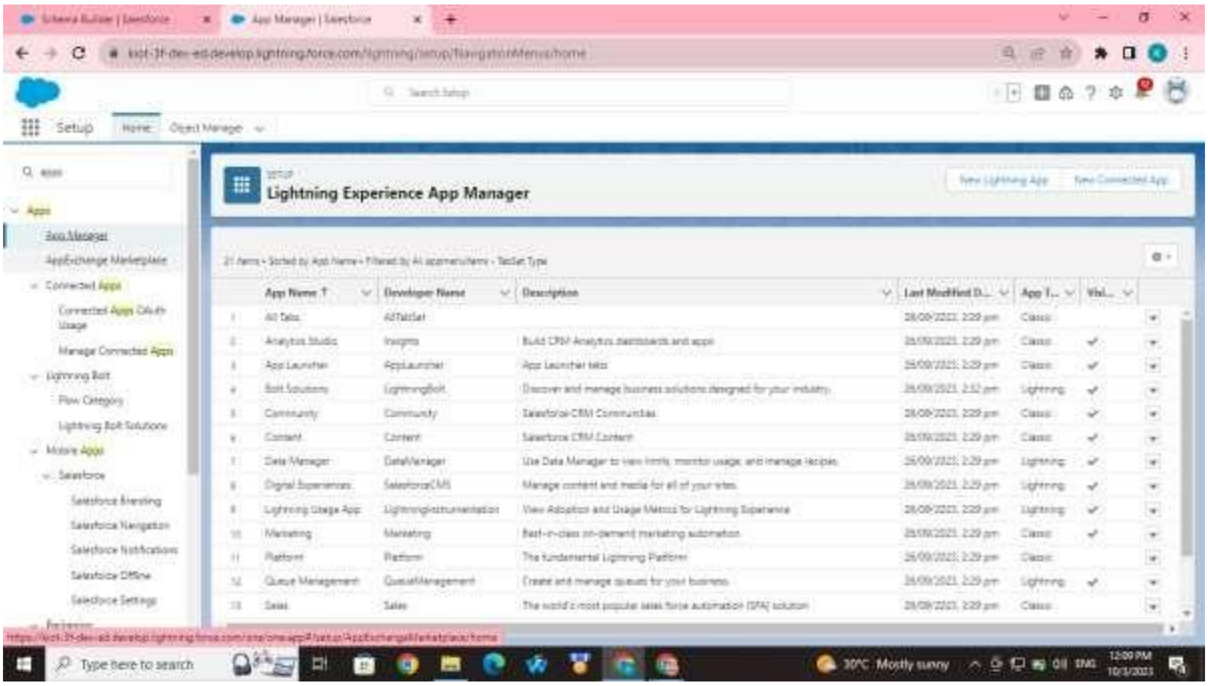
10.Assign the app to users or profiles.

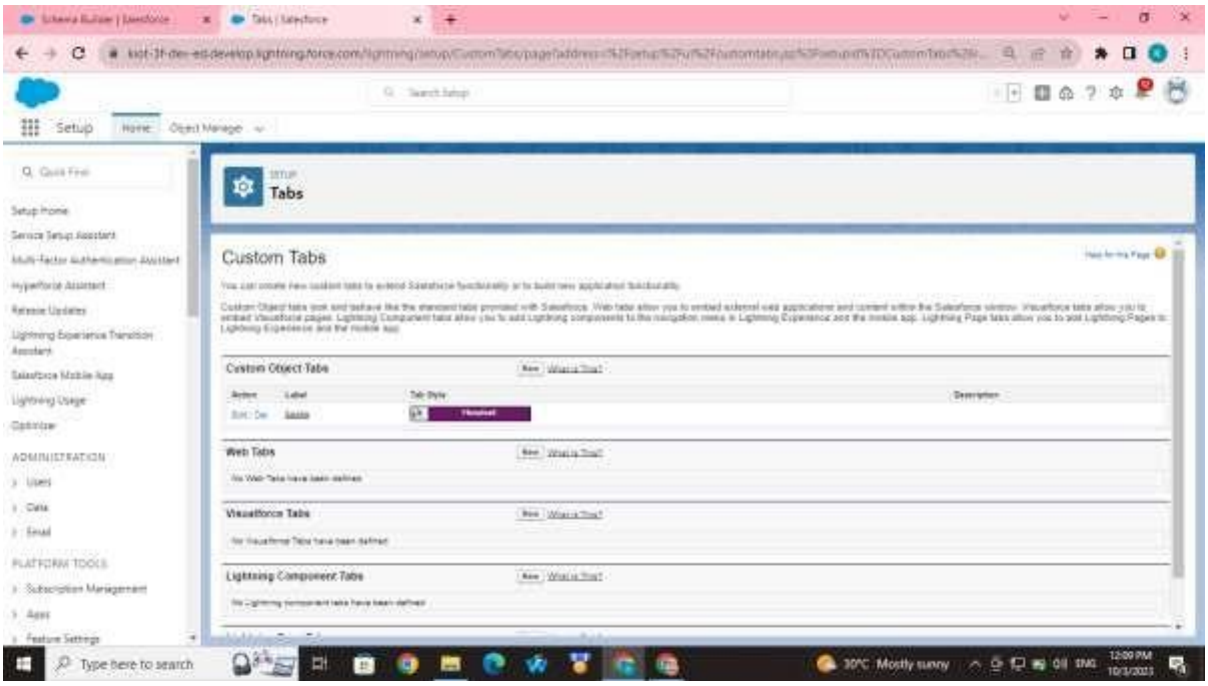
11.Test the app with the assigned users.

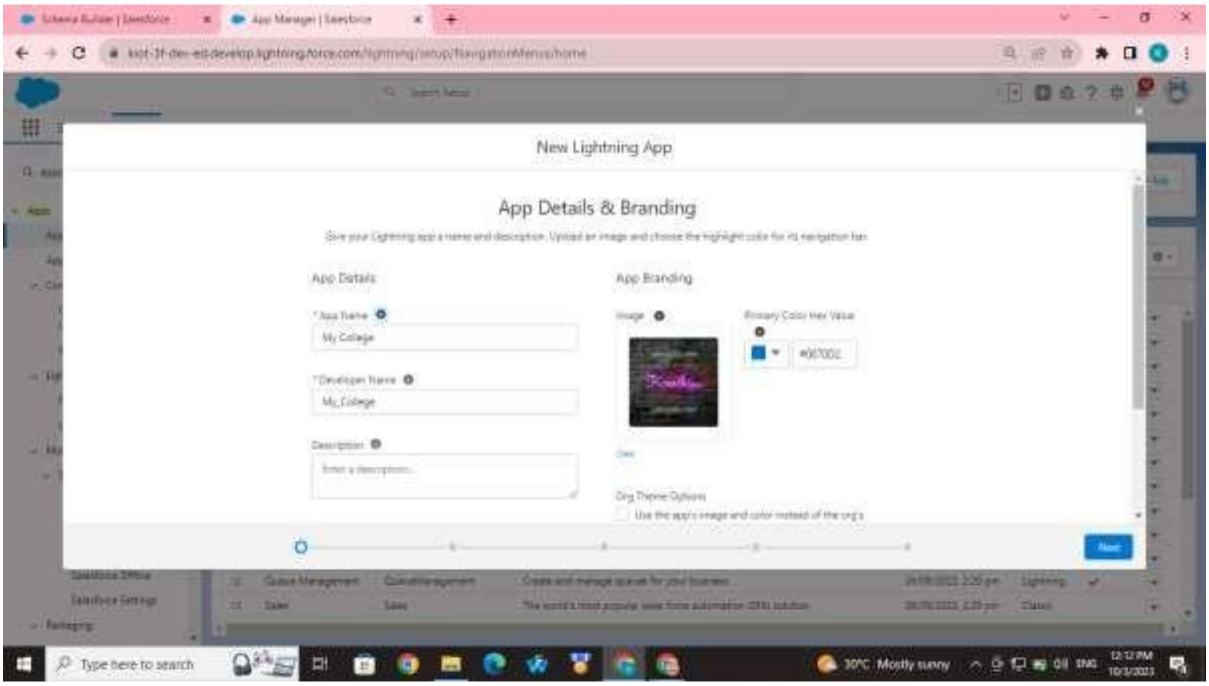





Setup
Tabs
Type here to search
30°C Mostly sunny


Setup
Lightning Experience App Manager
Type here to search
30°C Mostly sunny

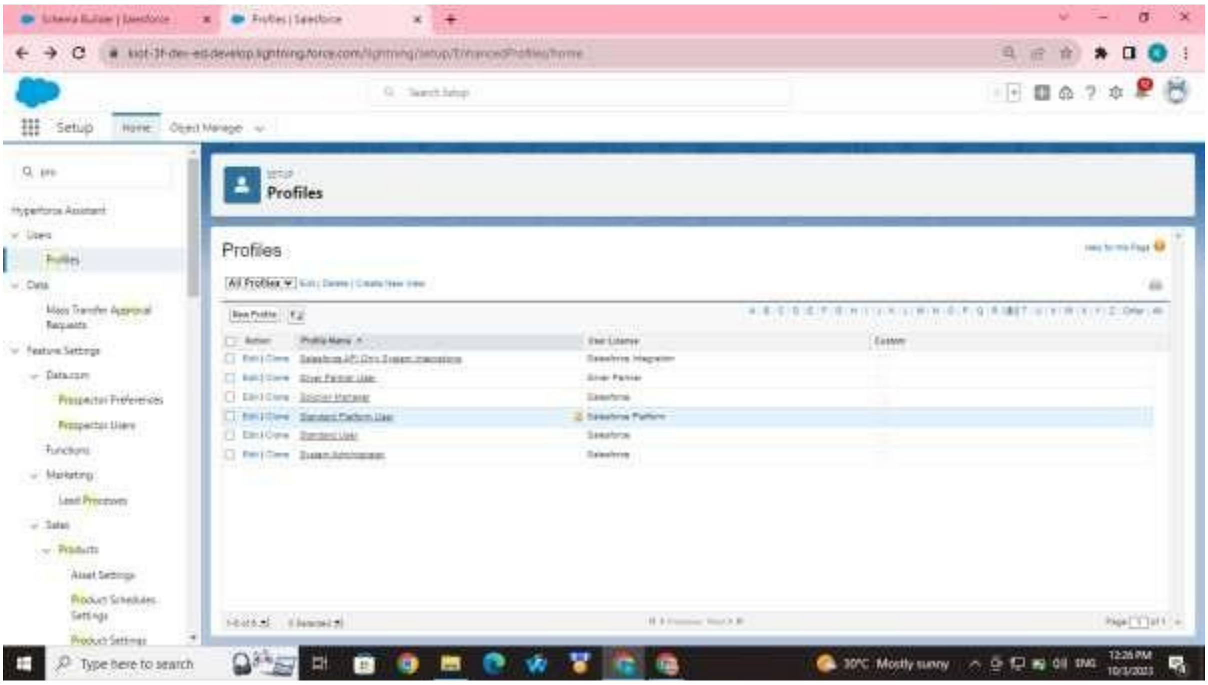

Setup
Tabs
Custom Tabs
Custom Object Tabs
Web Tabs
Visualforce Tabs
Lightning Component Tabs
ADMINISTRATION
PLATFORM TOOLS
Type here to search
30°C Mostly sunny

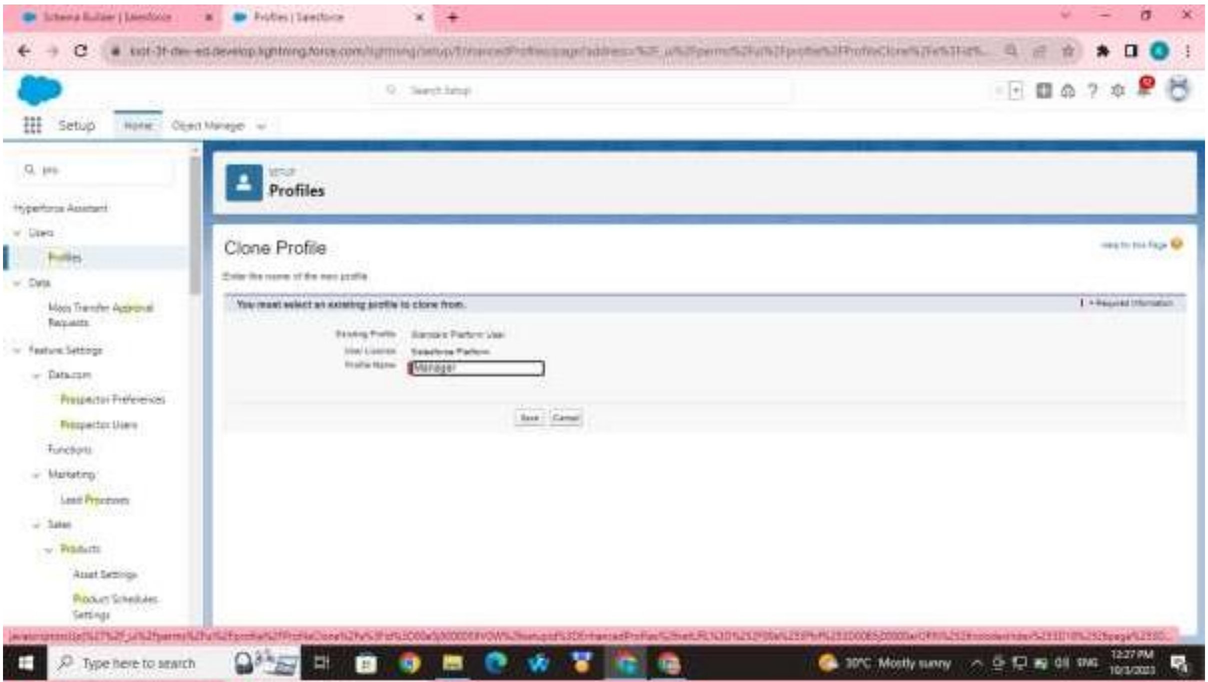

New Lightning App
App Details & Branding
App Details
App Branding
My College
My_College
Next
Type here to search
30°C Mostly sunny

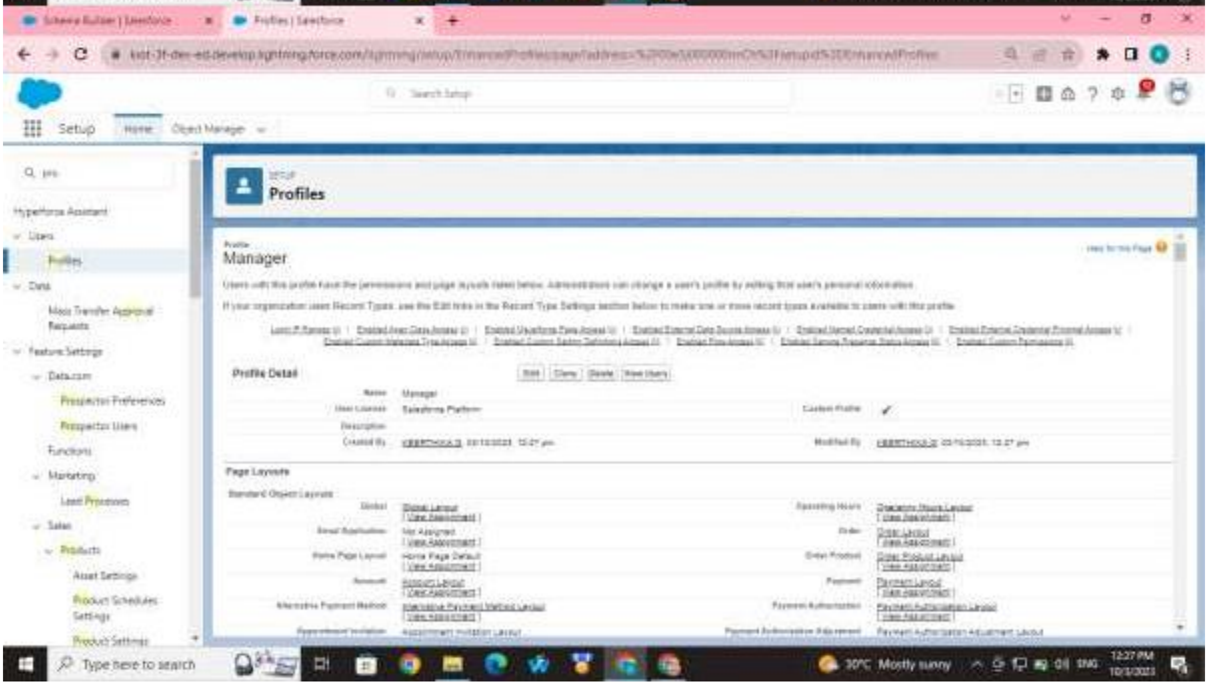
2. If there is 2 user, User A and User B in the organisation and we want in Account object that User A should not see the User B Record and user B should not see User A record then apply the Security for the users.

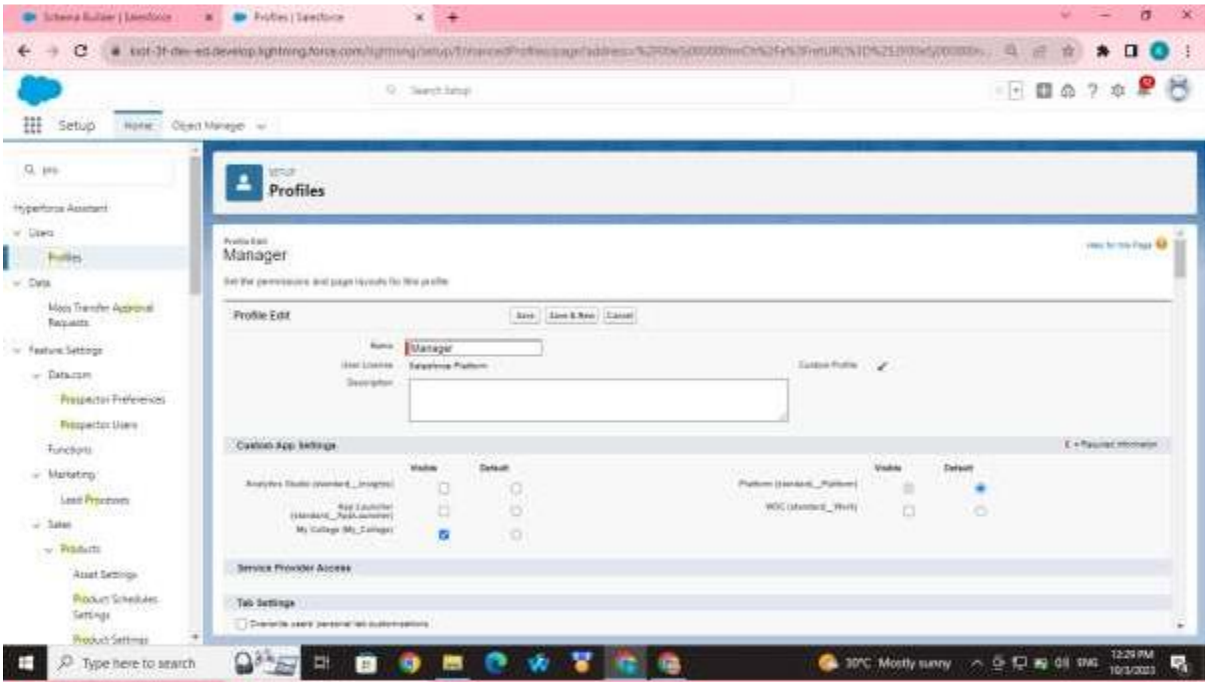
Solution:

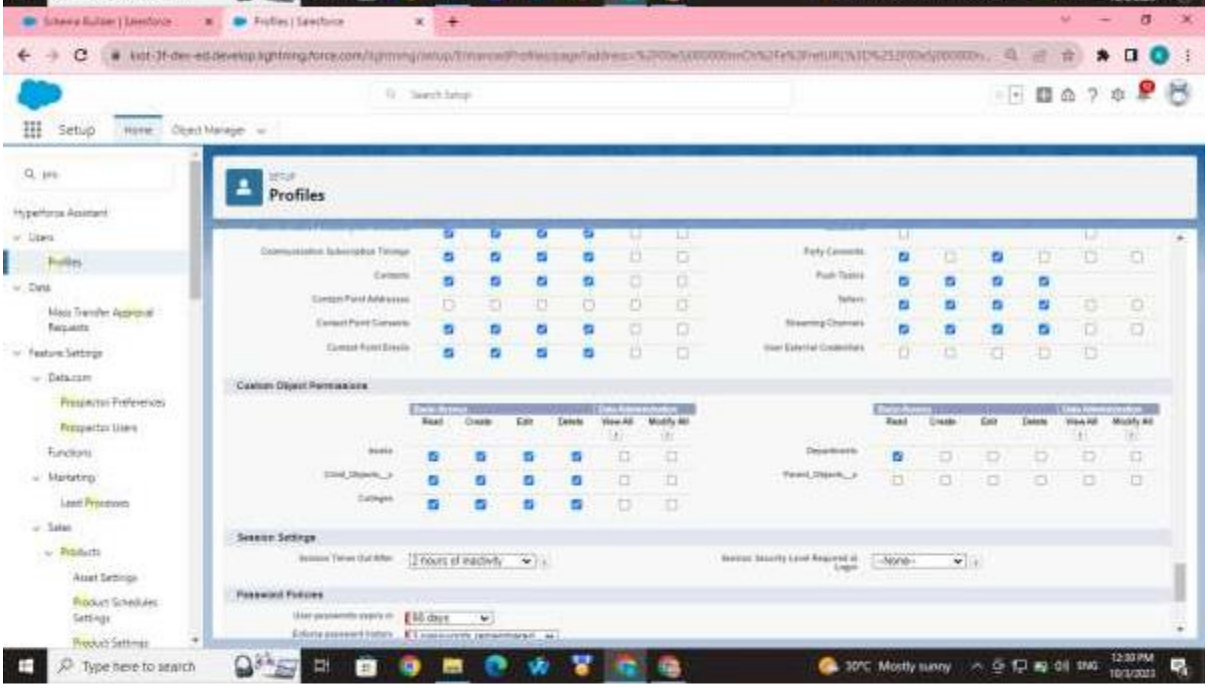
Step 1: Create two separate custom profiles, one for Manager and one for sales manager.

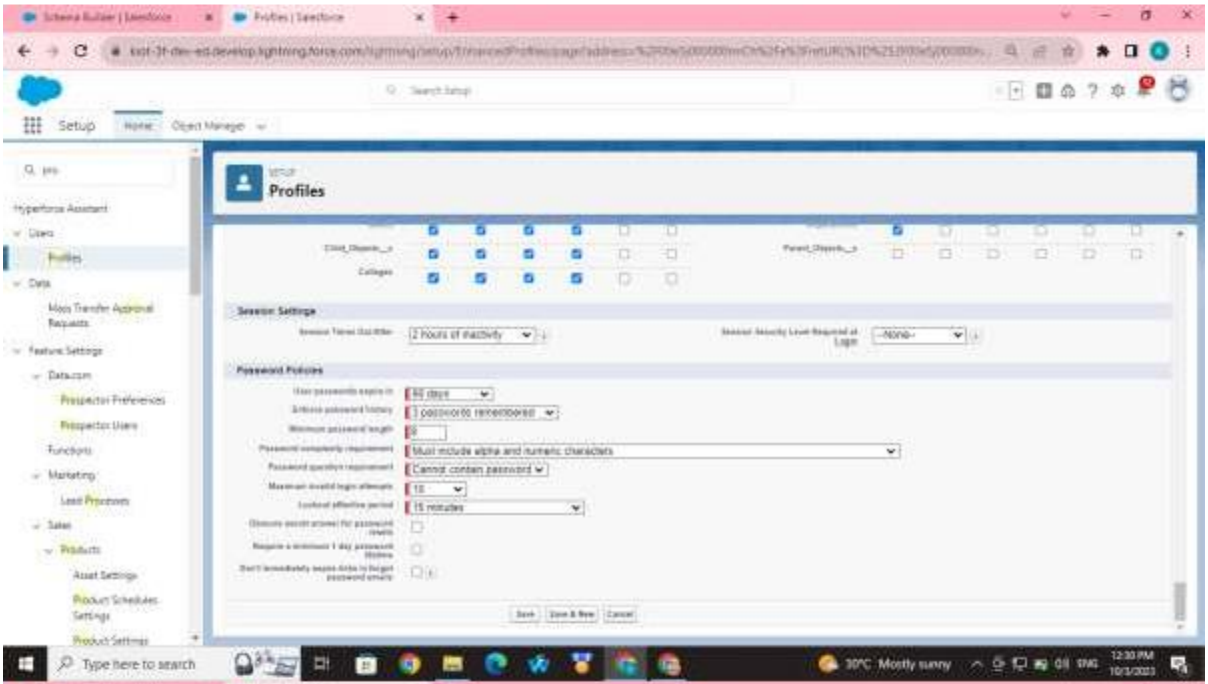


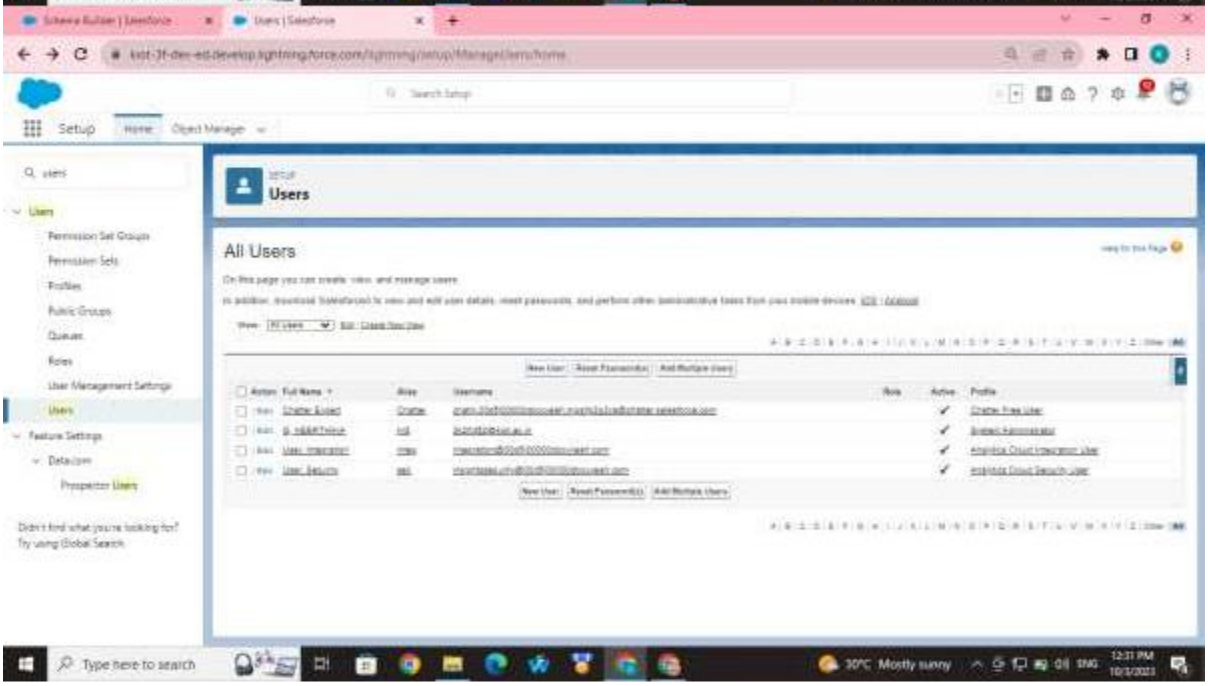

Setup
Profiles
Clone Profile
Manager
Save
Cancel
Type here to search
30°C Mostly sunny

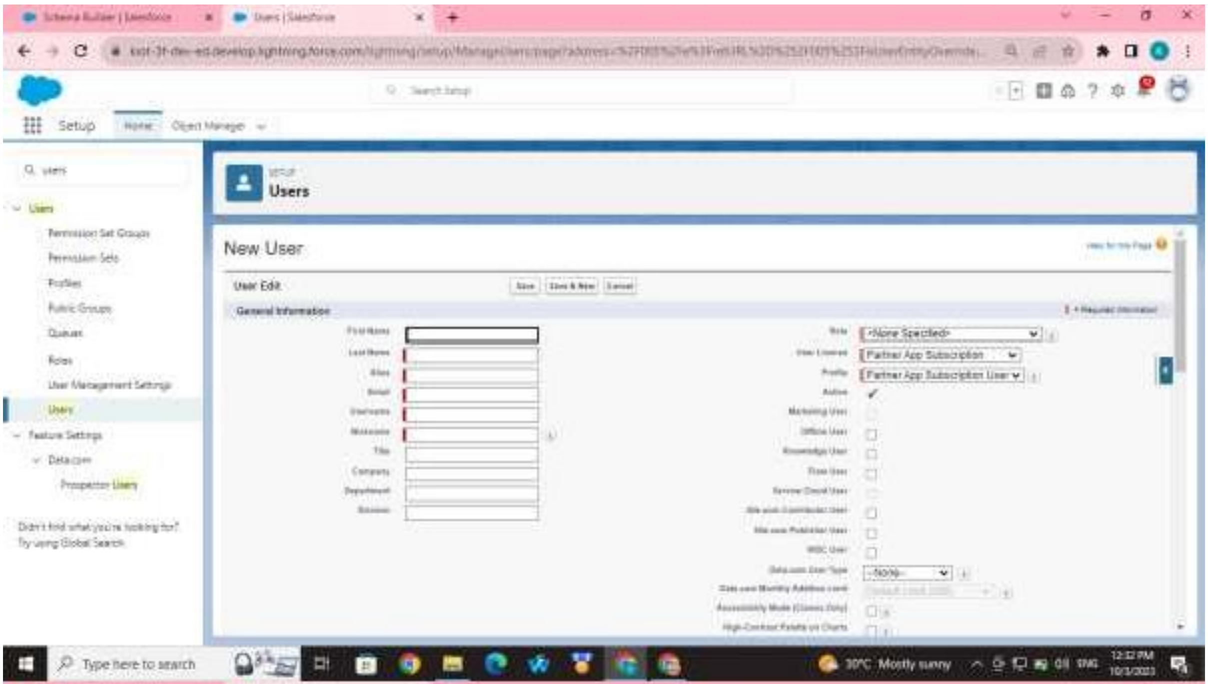

Setup
Profiles
Manager
Profile Detail
Page Layouts
Type here to search
30°C Mostly sunny

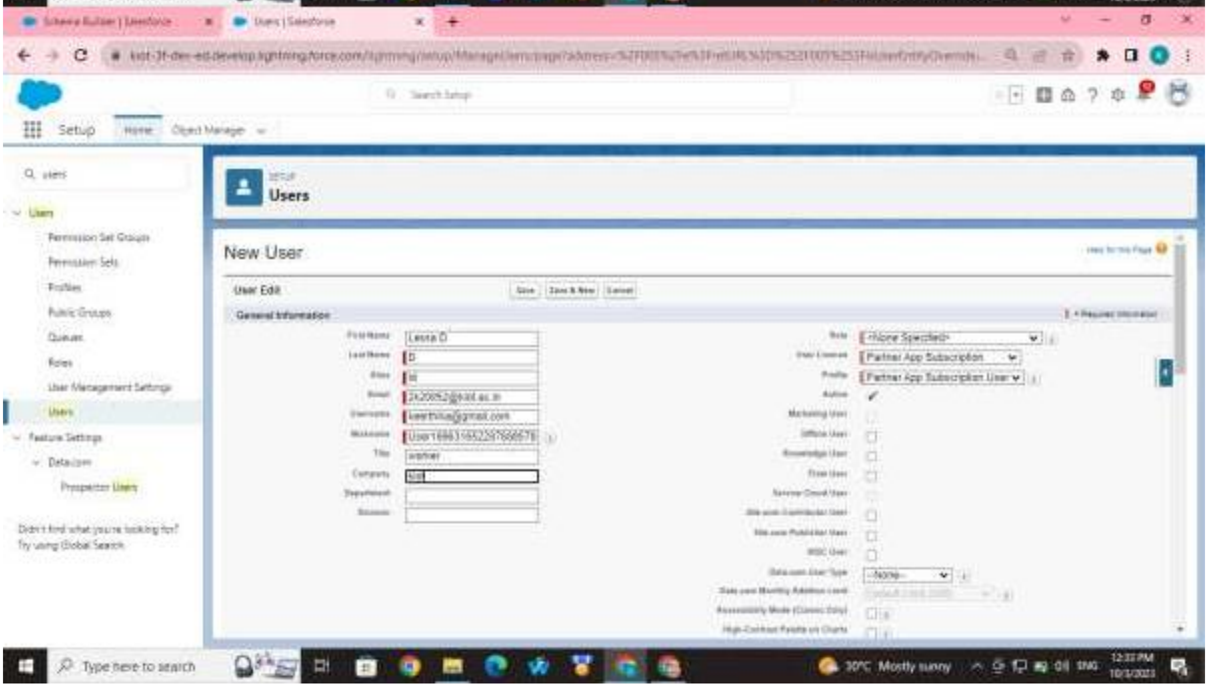

Setup
Profiles
Manager
Profile Edit
Type here to search

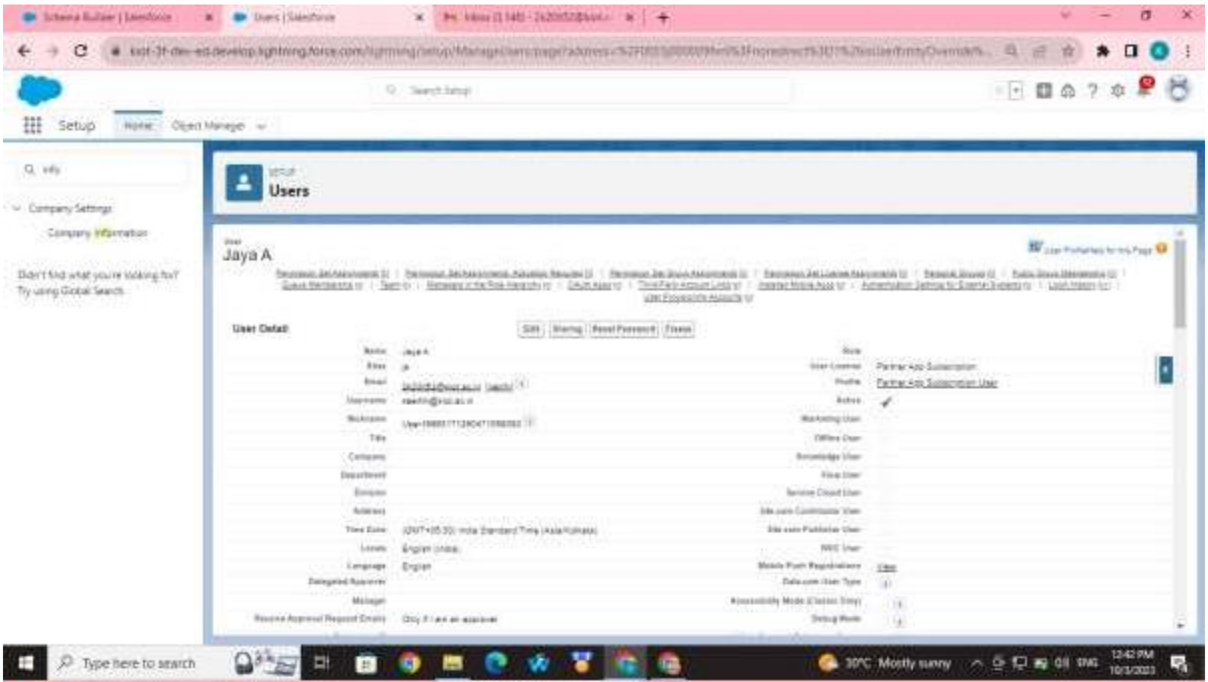

Setup
Profiles
Custom Object Permissions
Session Settings
Password Policies
Type here to search

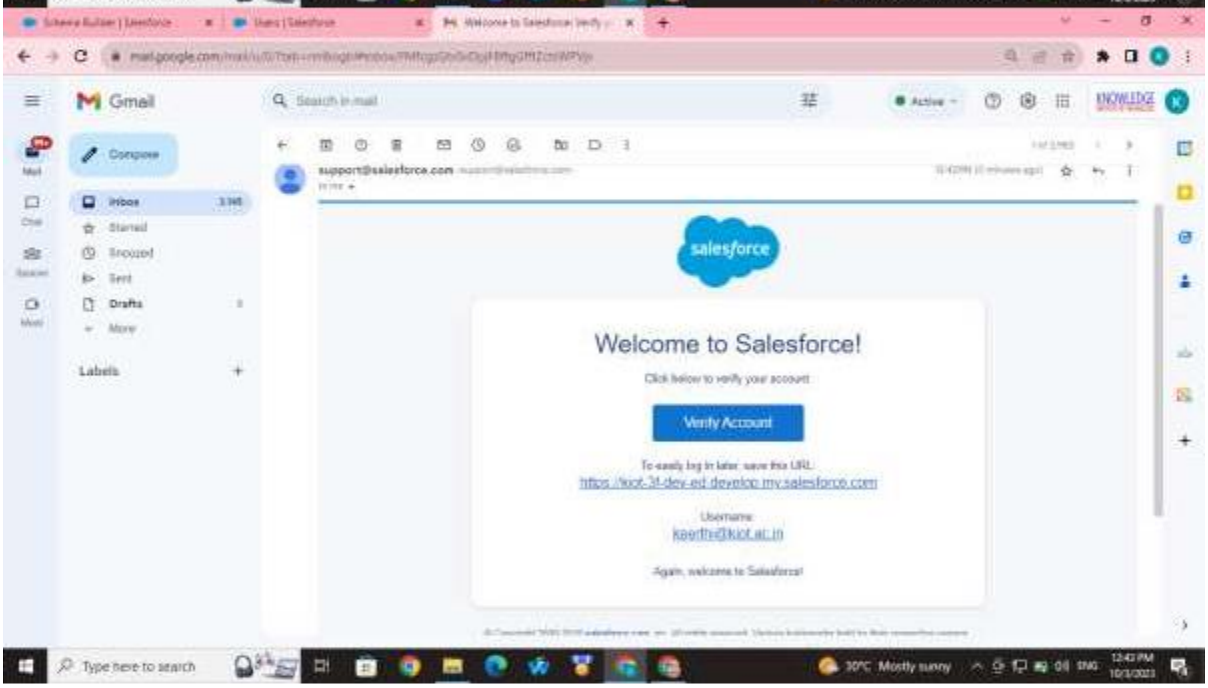

Profiles
Session Settings
Password Policies
2 hours of inactivity
Must include alpha and numeric characters
Cannot contain password
15 minutes
Type here to search
30°C Mostly sunny

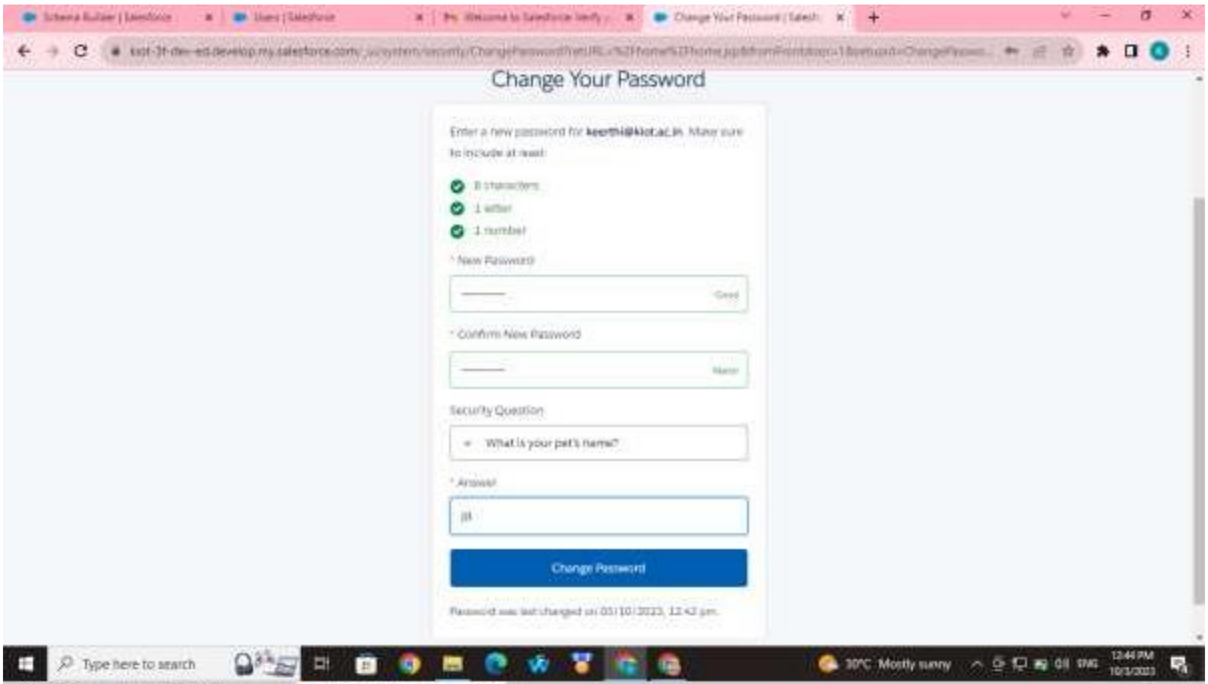

Users
All Users
Type here to search
30°C Mostly sunny

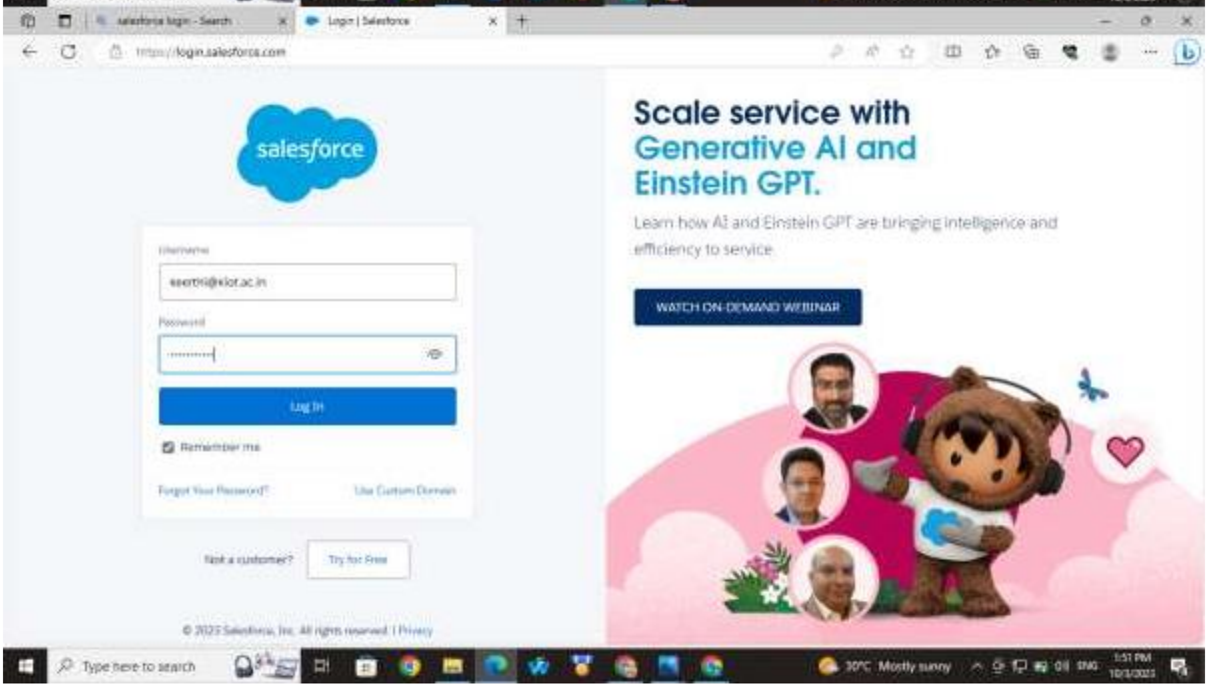

Setup
Users
New User
User Edit
General Information
Type here to search

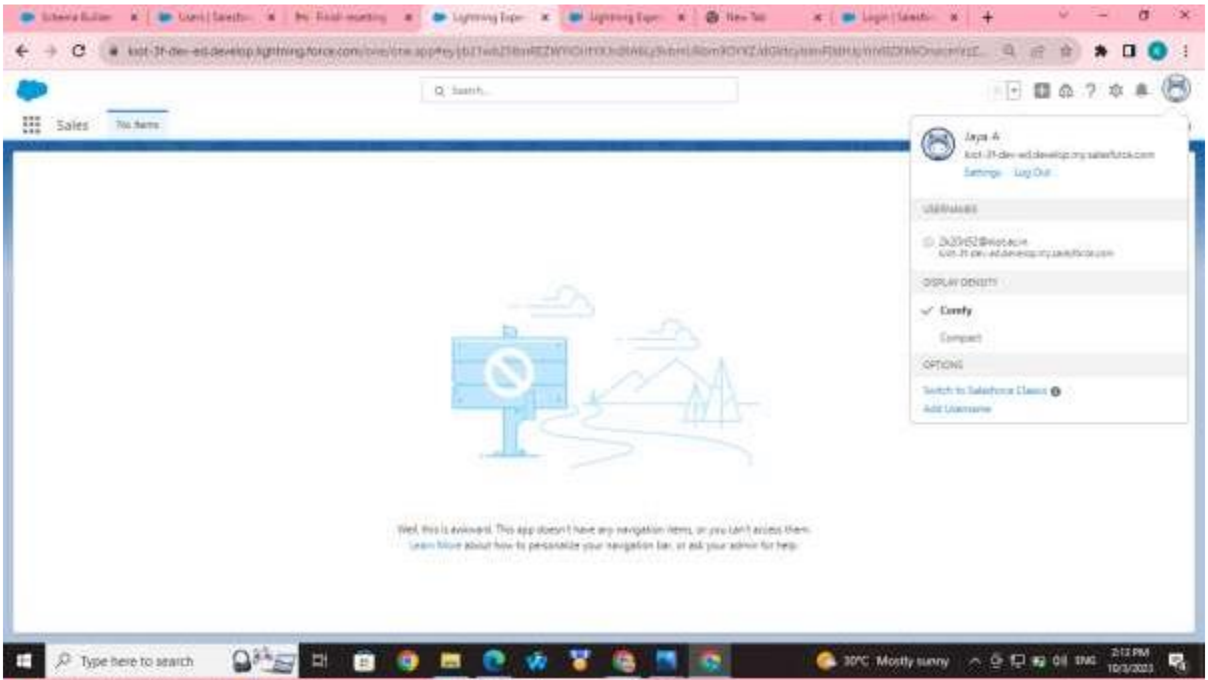
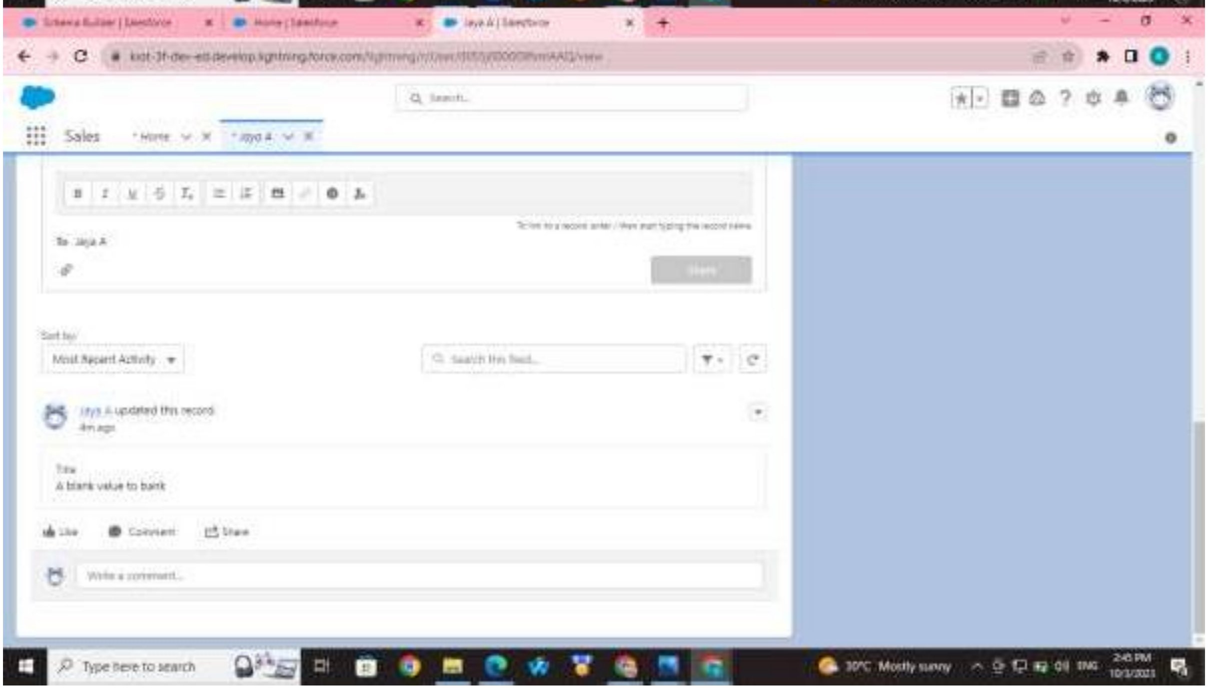

Setup
Users
New User
User Edit
General Information
Type here to search

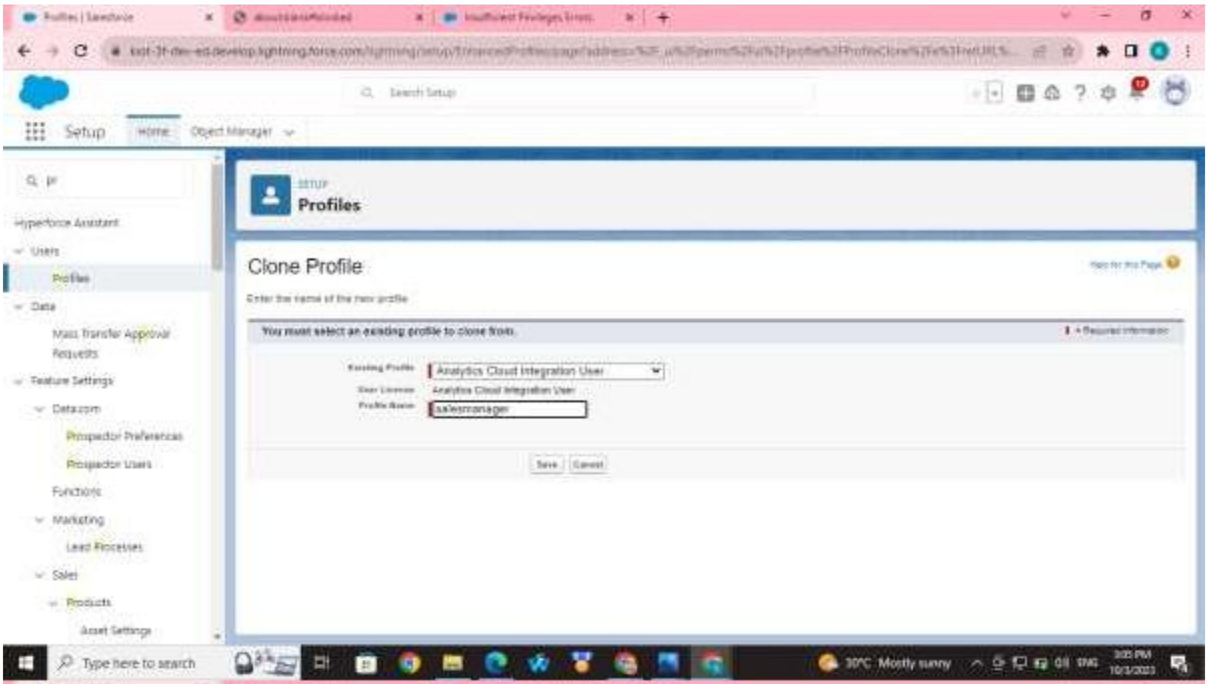

Setup
Object Manager
Company Settings
Company Information
Users
Jaya A
User Detail
Type here to search
30°C Mostly sunny

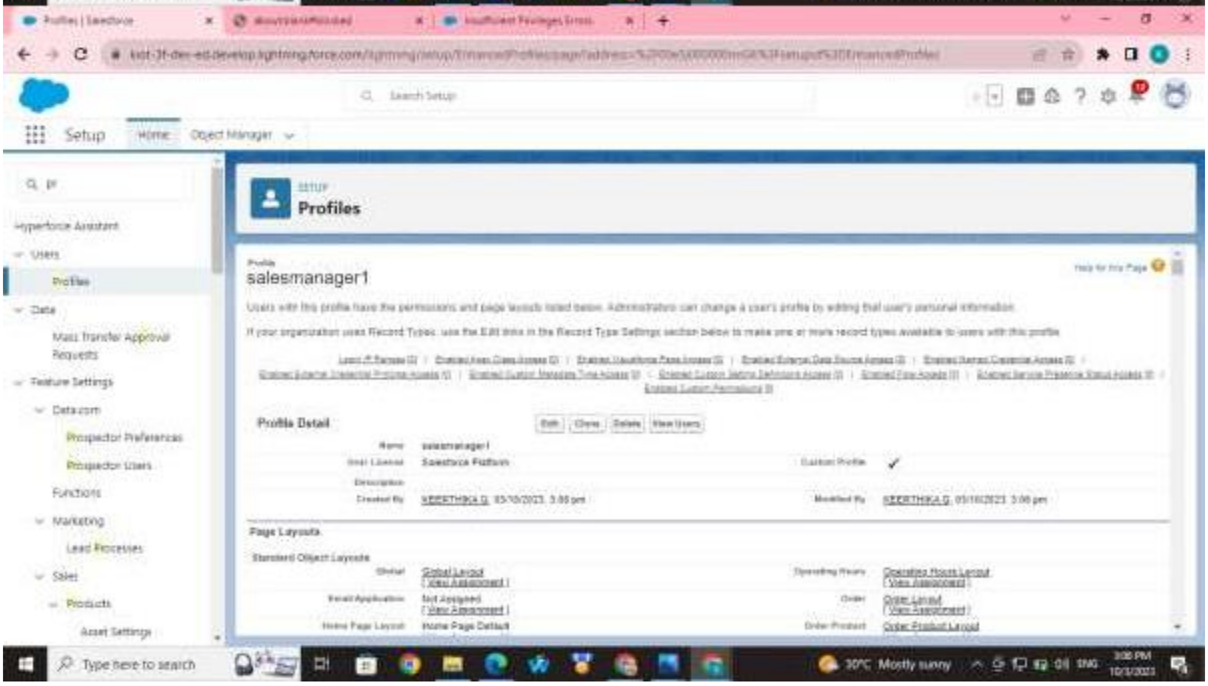

Gmail
Compose
Inbox
Starred
Snoozed
Sent
Drafts
More
Labels
support@salesforce.com
salesforce
Welcome to Salesforce!
Click below to verify your account
Verify Account
To easily log in later, save this URL:
https://kiot-3f-dev-ed.develop.my.salesforce.com
Username
keerthi@kiot.ac.in
Again, welcome to Salesforce!
Type here to search
30°C Mostly sunny

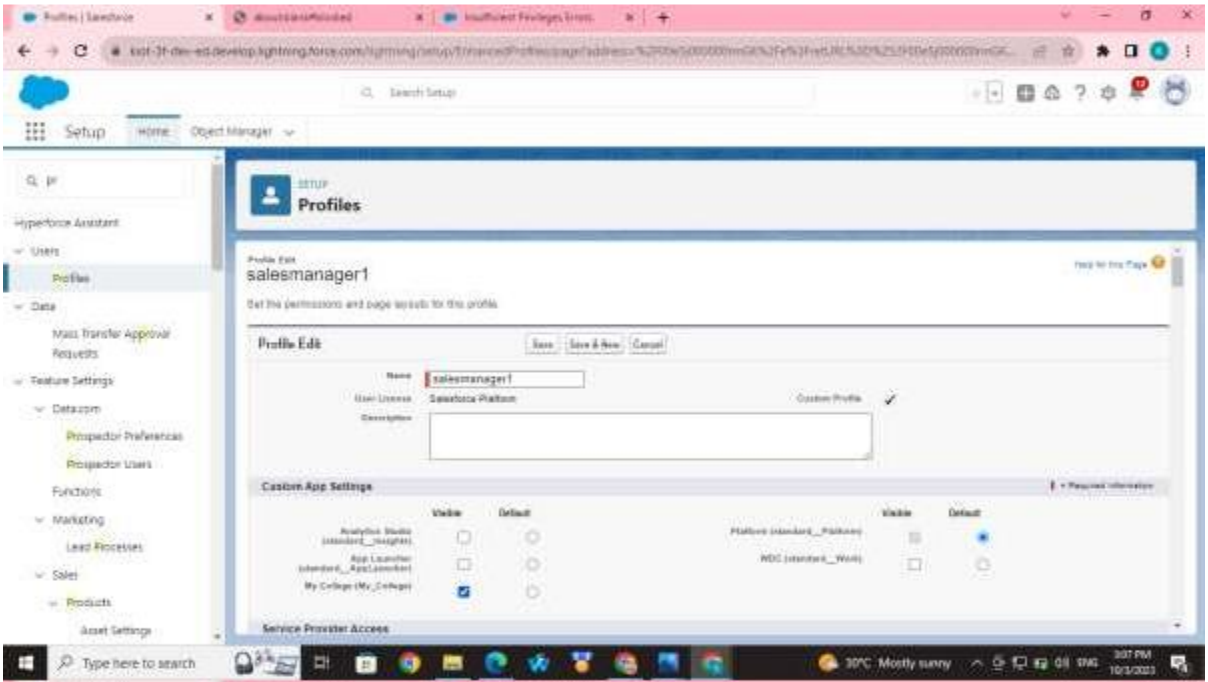

Change Your Password
Change Password
What is your pet's name?

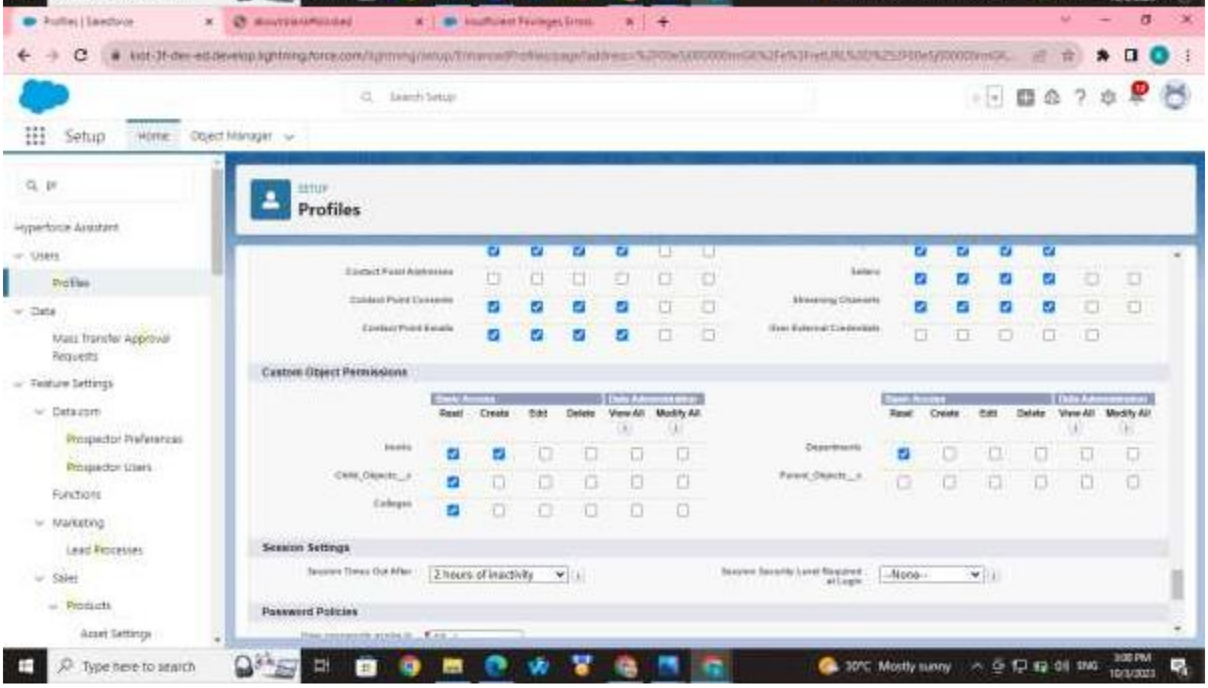

salesforce
Scale service with
Generative AI and
Einstein GPT.
Learn how AI and Einstein GPT are bringing intelligence and efficiency to service
WATCH ON-DEMAND WEBINAR
Log In
Remember me
Try for Free

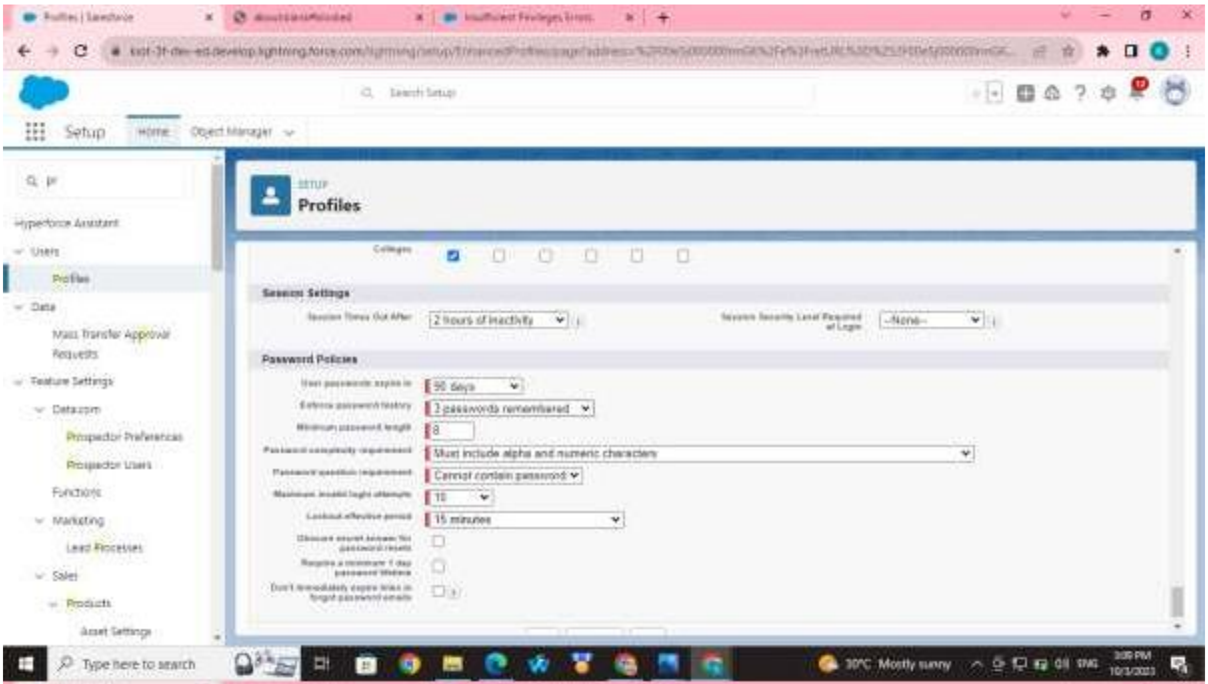

Sales
Type here to search
30°C Mostly sunny

Sales
Most Recent Activity
A blank value to bank
Like
Comment
Share
Type here to search
30°C Mostly sunny

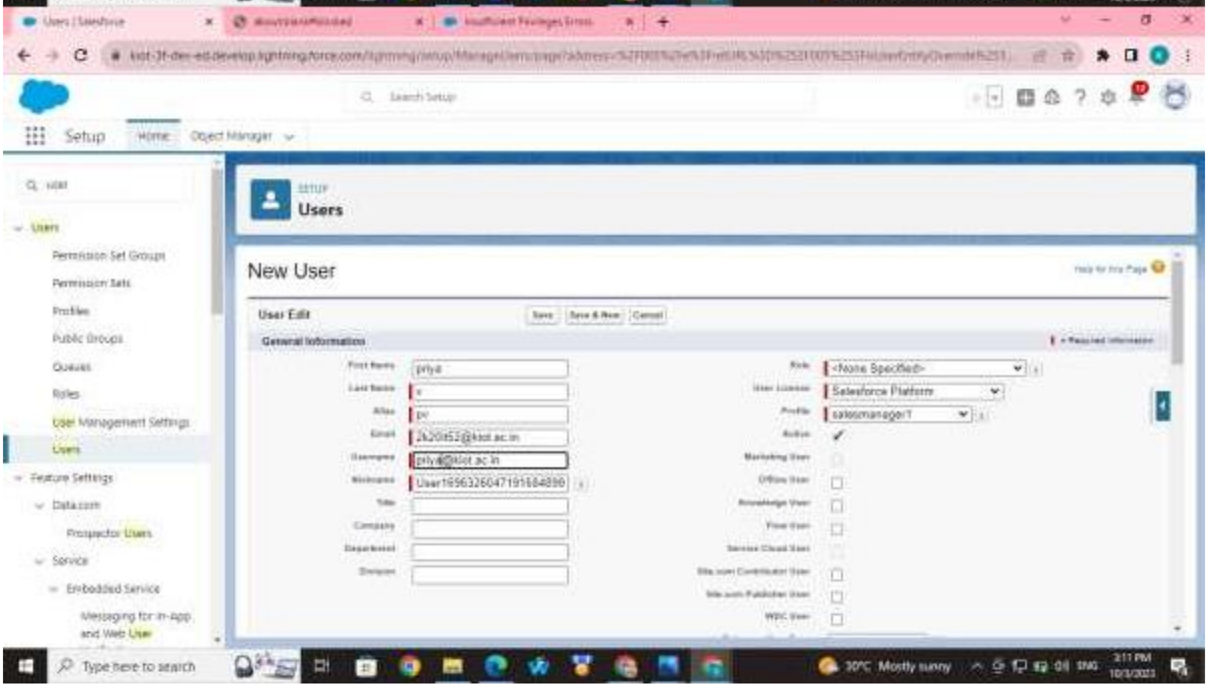


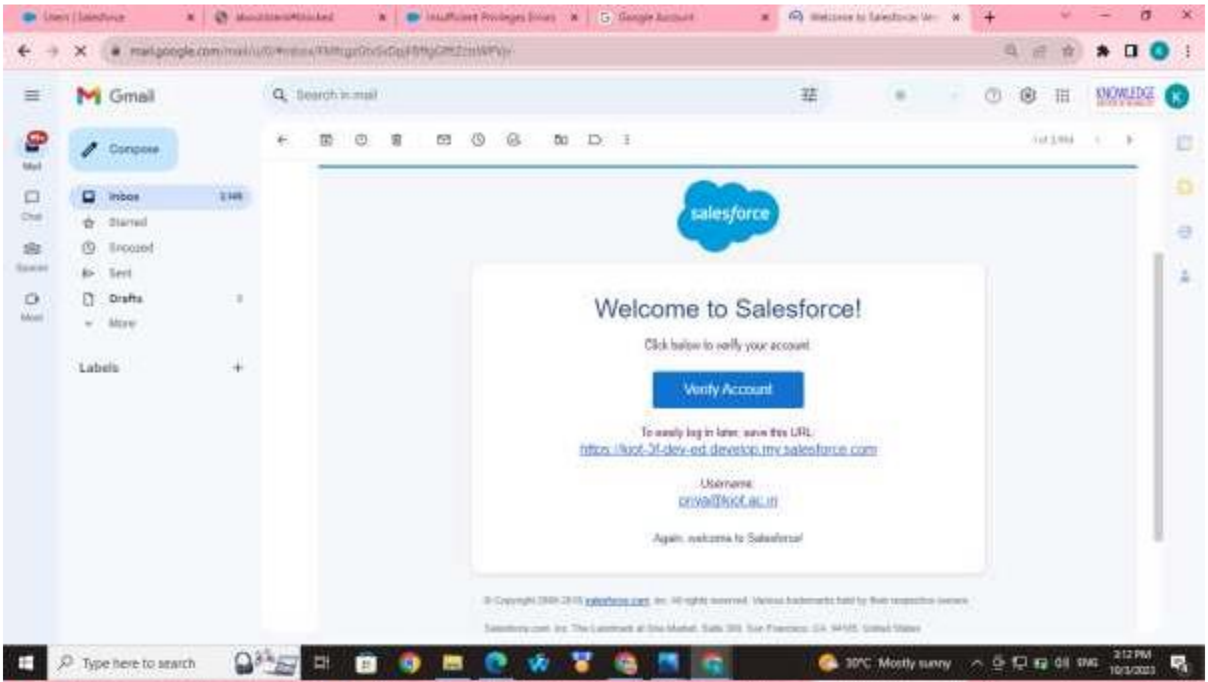


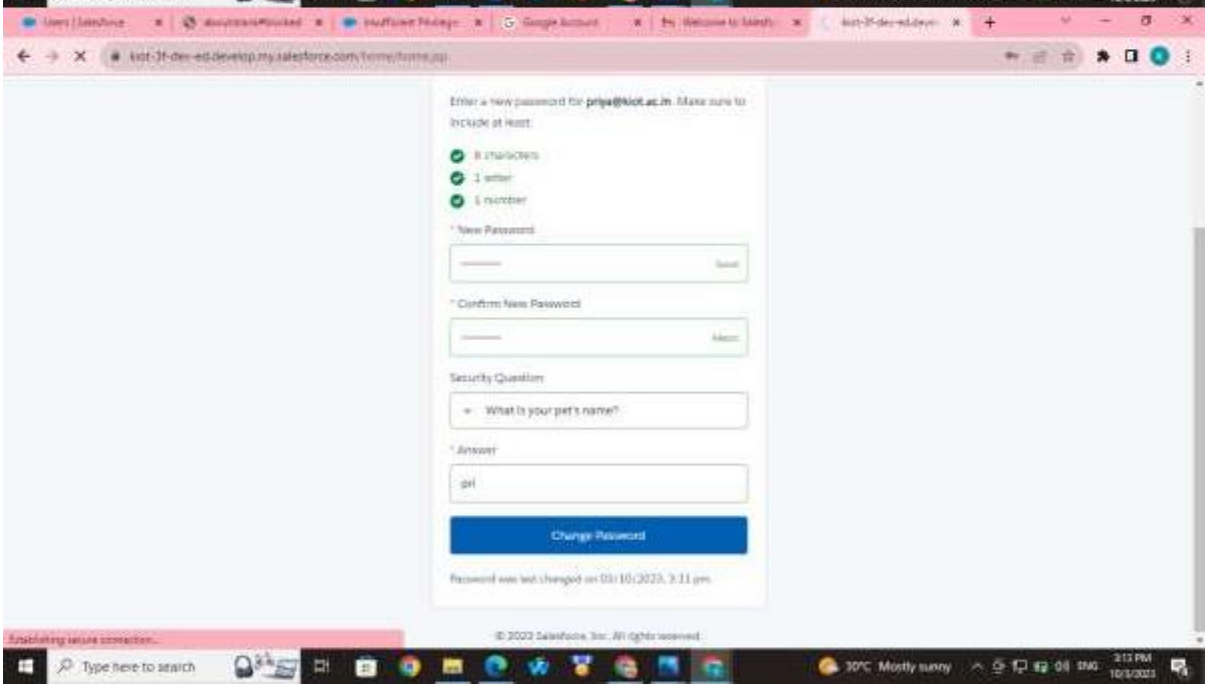

Setup
Profiles
salesmanager1
Profile Edit
Custom App Settings
Visible
Default
Service Provider Access
Type here to search
30°C Mostly sunny

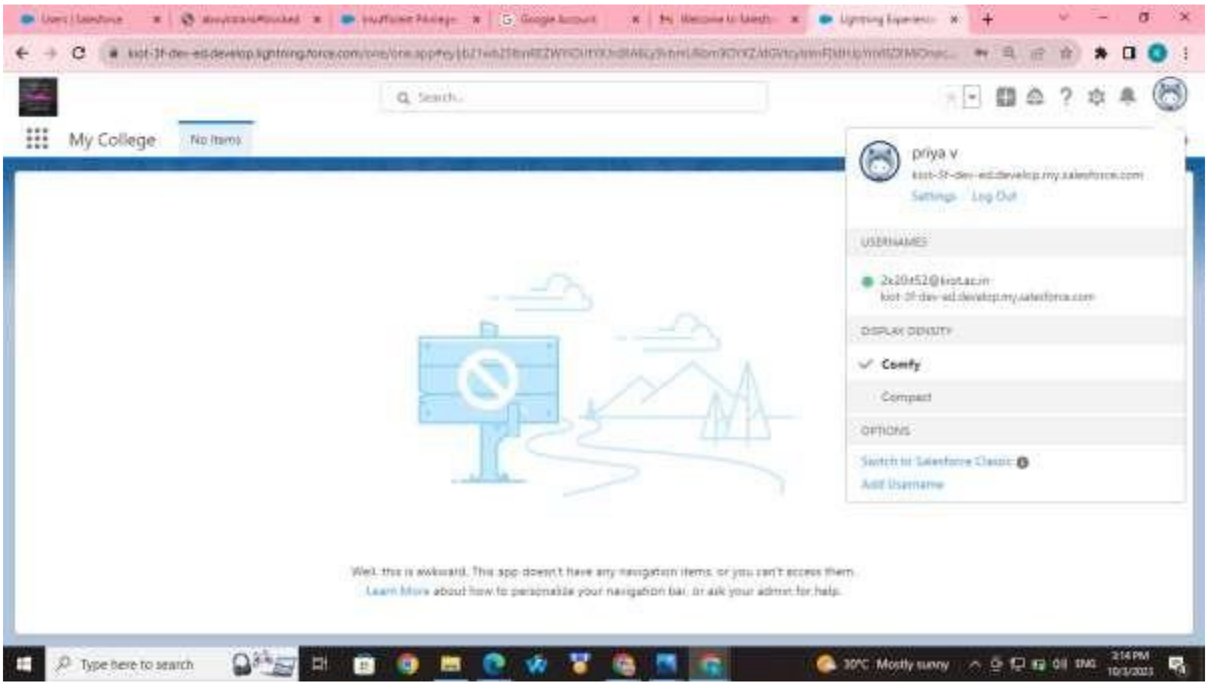

Setup
Profiles
Custom Object Permissions
Read
Create
Edit
Delete
View All
Modify All
Session Settings
2 hours of inactivity
--None--
Password Policies
Type here to search
30°C Mostly sunny


Setup
Profiles
Session Settings
Password Policies
2 hours of inactivity
90 days
3 passwords remembered
Must include alpha and numeric characters
Cannot contain password
15 minutes


Setup
Users
New User
User Edit
General Information
priya
Salesforce Platform
salesmanager1


Gmail
Compose
Inbox
Starred
Snoozed
Sent
Drafts
More
Labels
salesforce
Welcome to Salesforce!
Click below to verify your account
Verify Account
To easily log in later, save this URL:
https://kiot-3f-dev-ed.develop.my.salesforce.com
Username:
priya@kiot.ac.in
Again, welcome to Salesforce!
Type here to search
30°C Mostly sunny


Enter a new password for priya@kiot.ac.in. Make sure to include at least:
8 characters
1 letter
1 number
* New Password
* Confirm New Password
Security Question
What is your pet's name?
* Answer
Change Password
© 2023 Salesforce, Inc. All rights reserved.
Type here to search
30°C Mostly sunny



Step 2:

Permission Sets:

• Create two permission sets, one for manager and one for sales manager.

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-manager and I- sales manager 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 manager with manager and

records owned by I sales manager with sales manager.

• For the sharing rule criteria, specify that records owned by manager are shared with user

A, and records owned by sales manager are shared with sales manager.

Ownership:

• Ensure that the Account records are owned by the respective users, with manager owning

their records and sales manager owning their records.

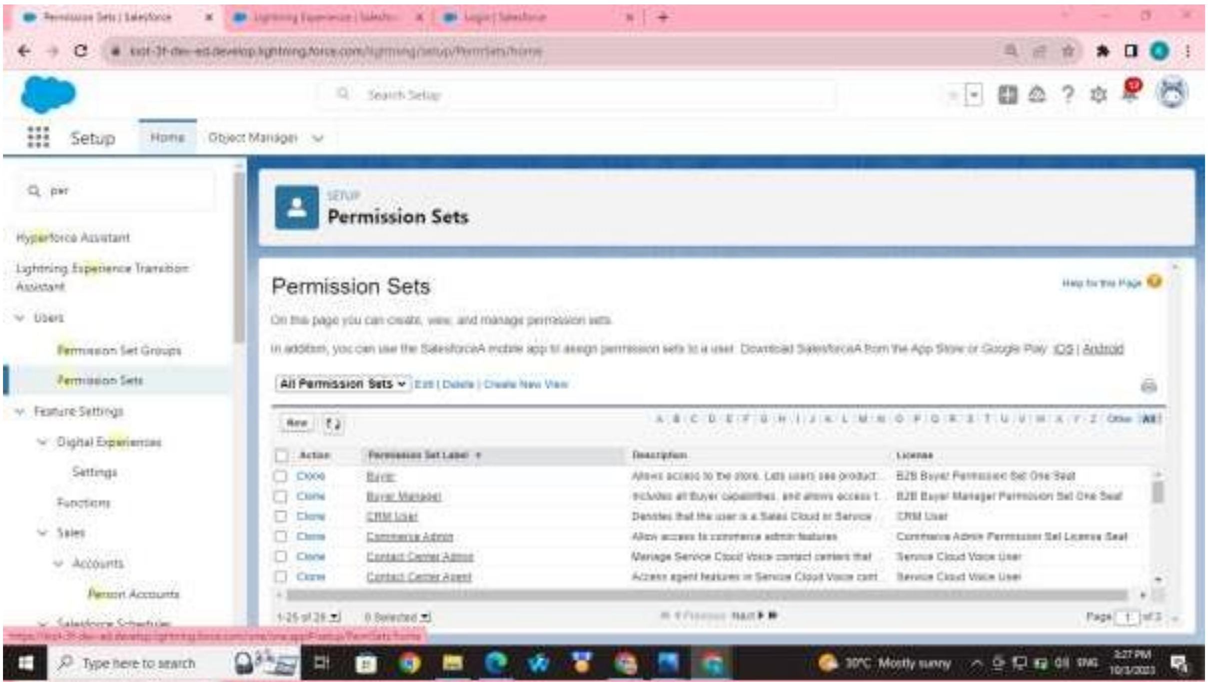
Organization-Wide Defaults:

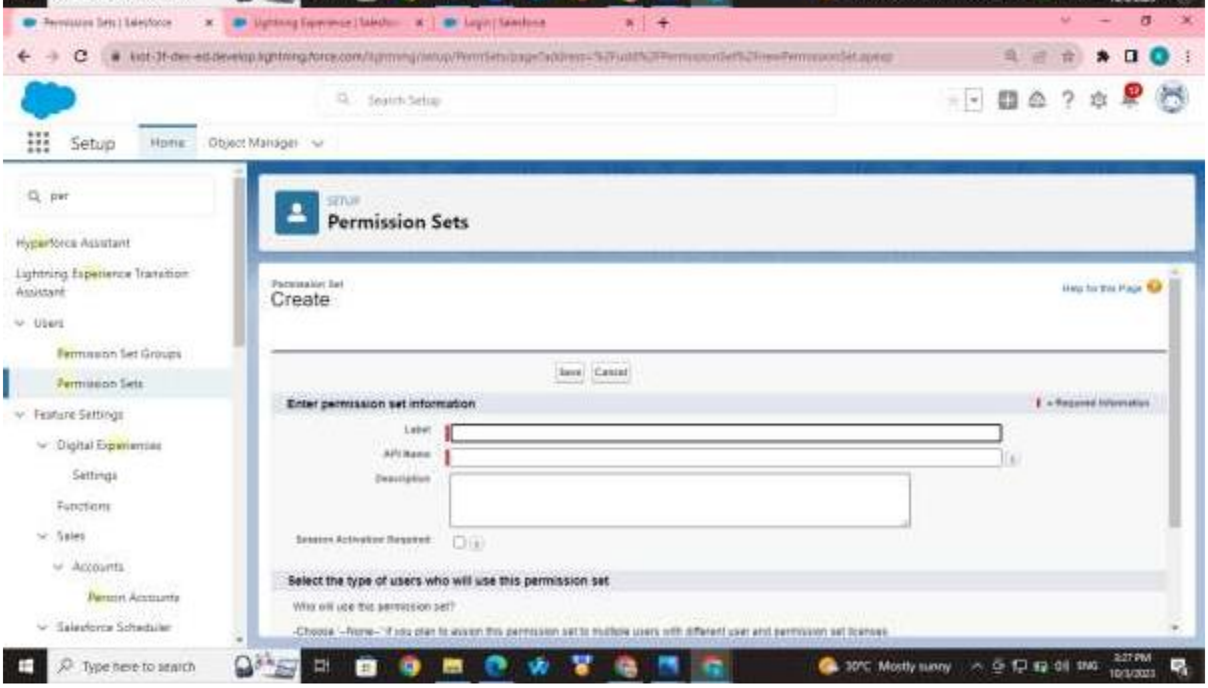
• Set the organization-wide defaults for the Account object to "Private" to ensure that

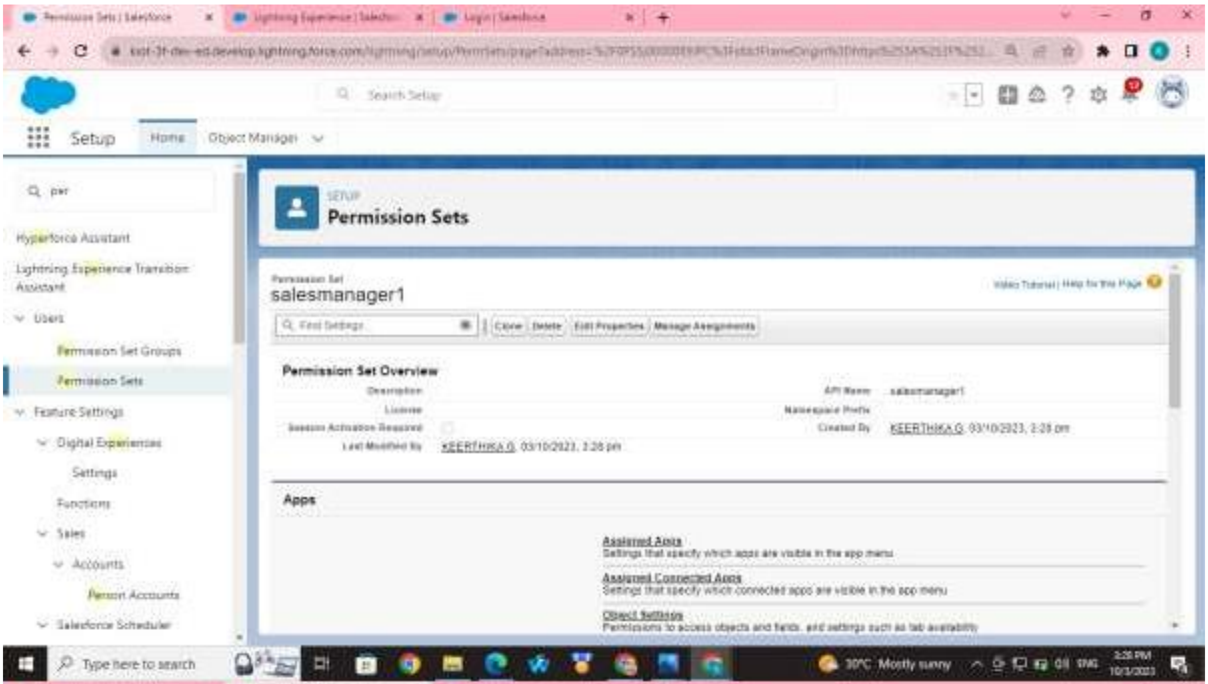
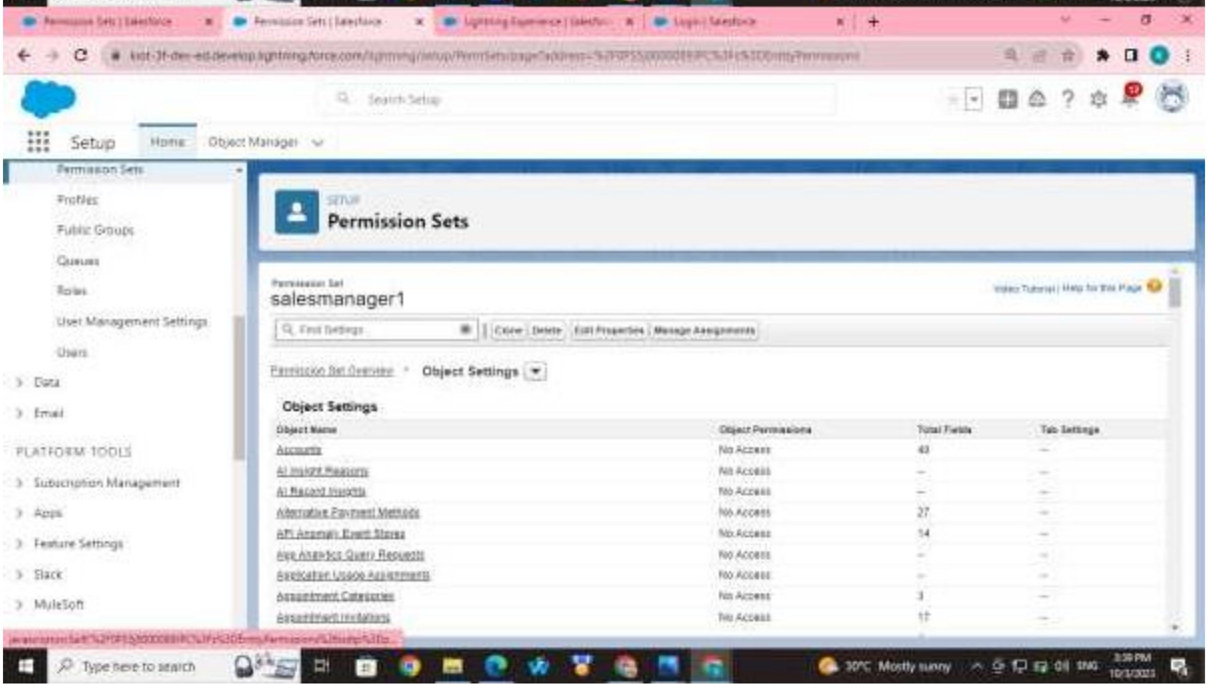
records are private by default.

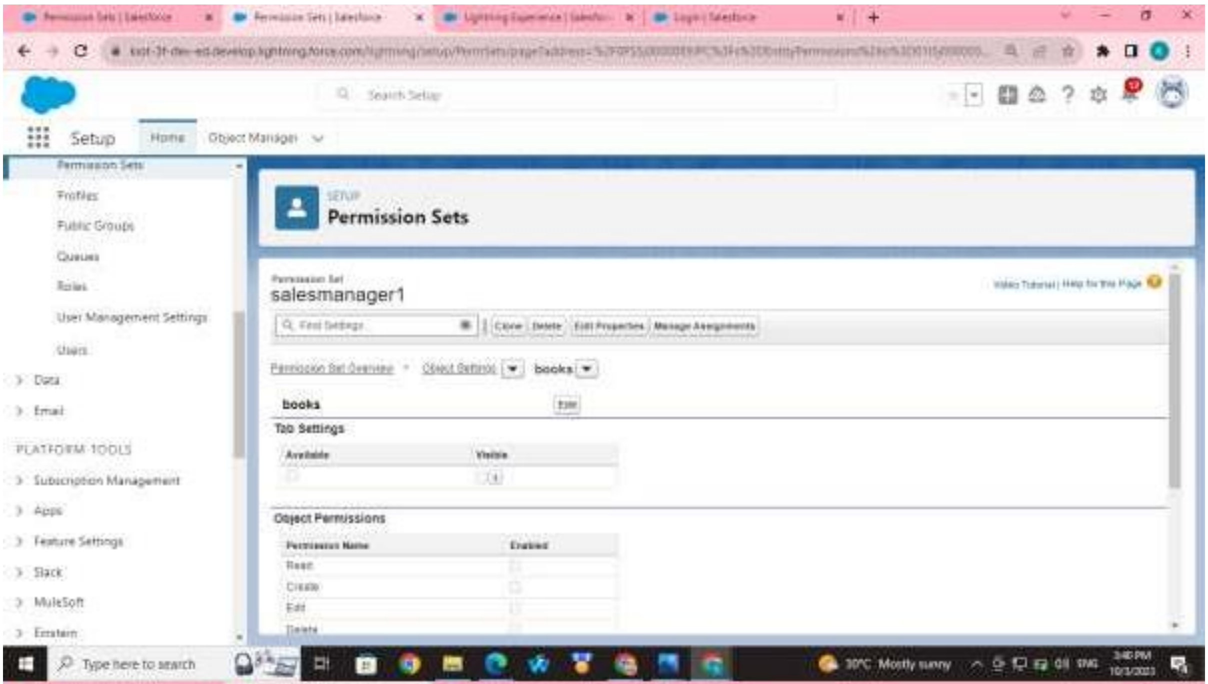
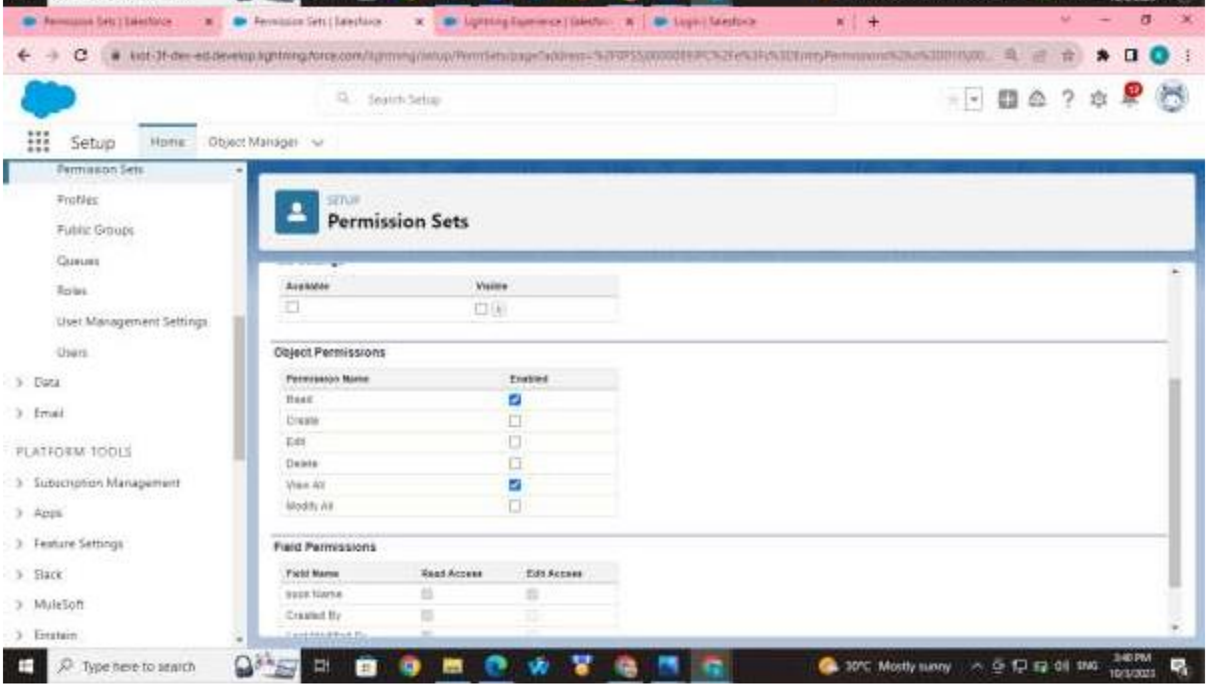
Testing:

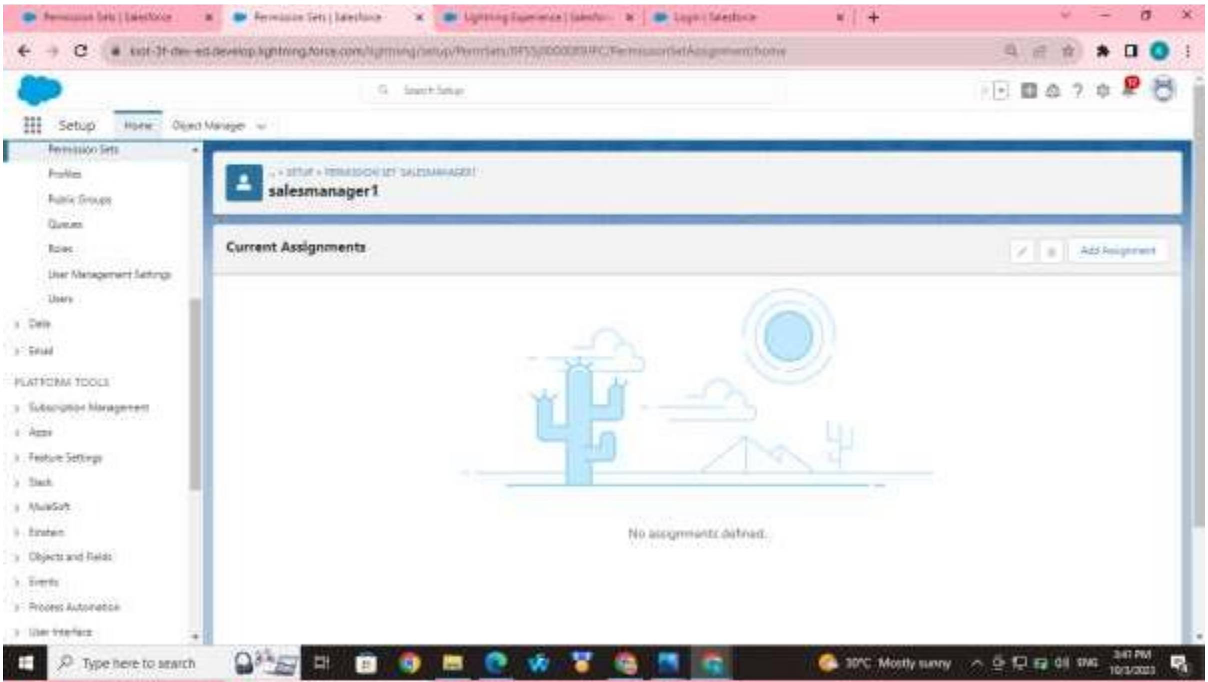
• Test the setup by logging in as manager and sales manager separately to verify that they cannot access each other's records.

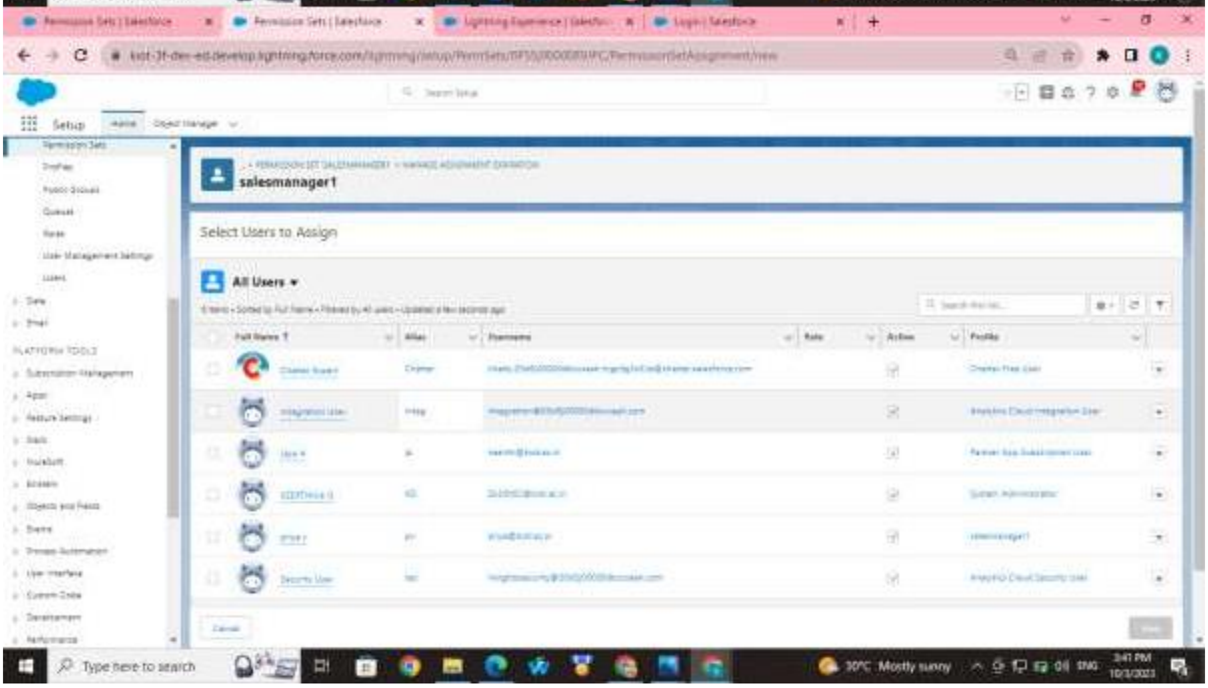

Setup
Home
Object Manager
Hyperforce Assistant
Lightning Experience Transition Assistant
Users
Permission Set Groups
Permission Sets
Feature Settings
Digital Experiences
Settings
Functions
Sales
Accounts
Person Accounts
SETUP
Permission Sets
Permission Sets
On this page you can create, view, and manage permission sets.
In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: iOS | Android
All Permission Sets
Edit | Delete | Create New View
New
Action
Permission Set Label
Description
License
Clone
Buyer
Allows access to the store. Lets users see product...
B2B Buyer Permission Set One Seat
Clone
Buyer Manager
Includes all Buyer capabilities, and allows access t...
B2B Buyer Manager Permission Set One Seat
Clone
CRM User
Denotes that the user is a Sales Cloud or Service
CRM User
Clone
Commerce Admin
Allow access to commerce admin features
Commerce Admin Permission Set License Seat
Clone
Contact Center Admin
Manage Service Cloud Voice contact centers that
Service Cloud Voice User
Clone
Contact Center Agent
Access agent features in Service Cloud Voice cont...
Service Cloud Voice User
Type here to search
30°C Mostly sunny
3:27 PM
10/3/2023

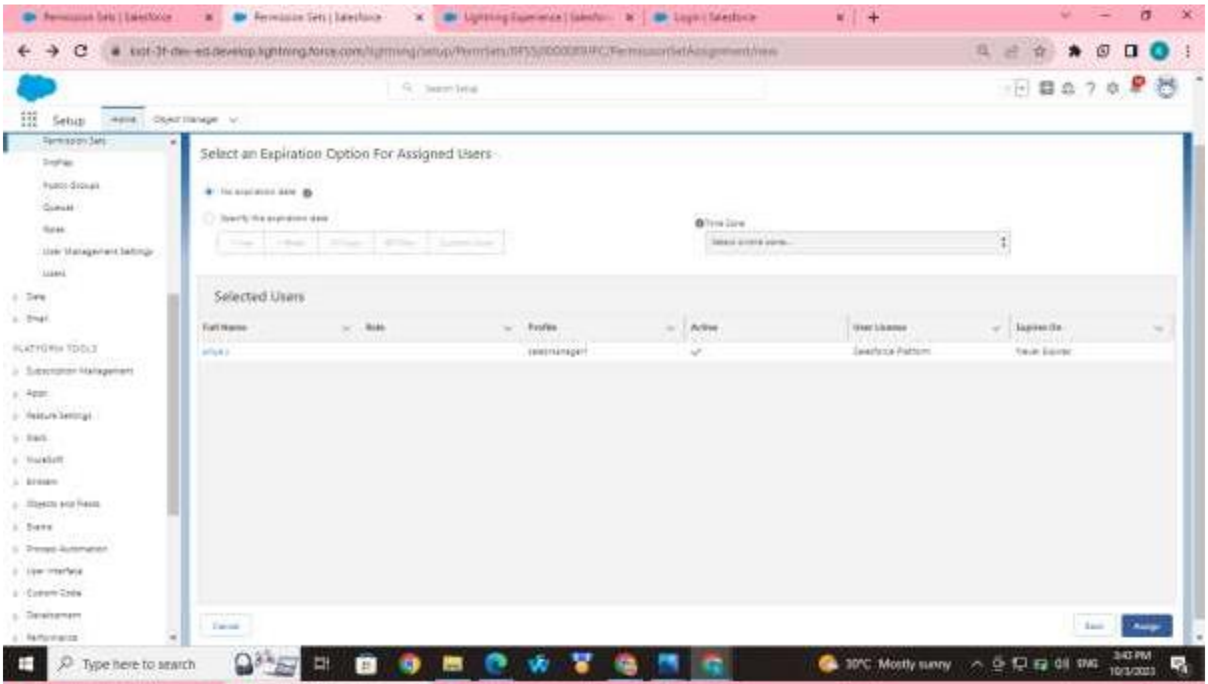

Setup
Home
Object Manager
SETUP
Permission Sets
Permission Set
Create
Save
Cancel
Enter permission set information
= Required Information
Label
API Name
Description
Session Activation Required
Select the type of users who will use this permission set
Who will use this permission set?
Type here to search
30°C Mostly sunny
3:27 PM
10/3/2023

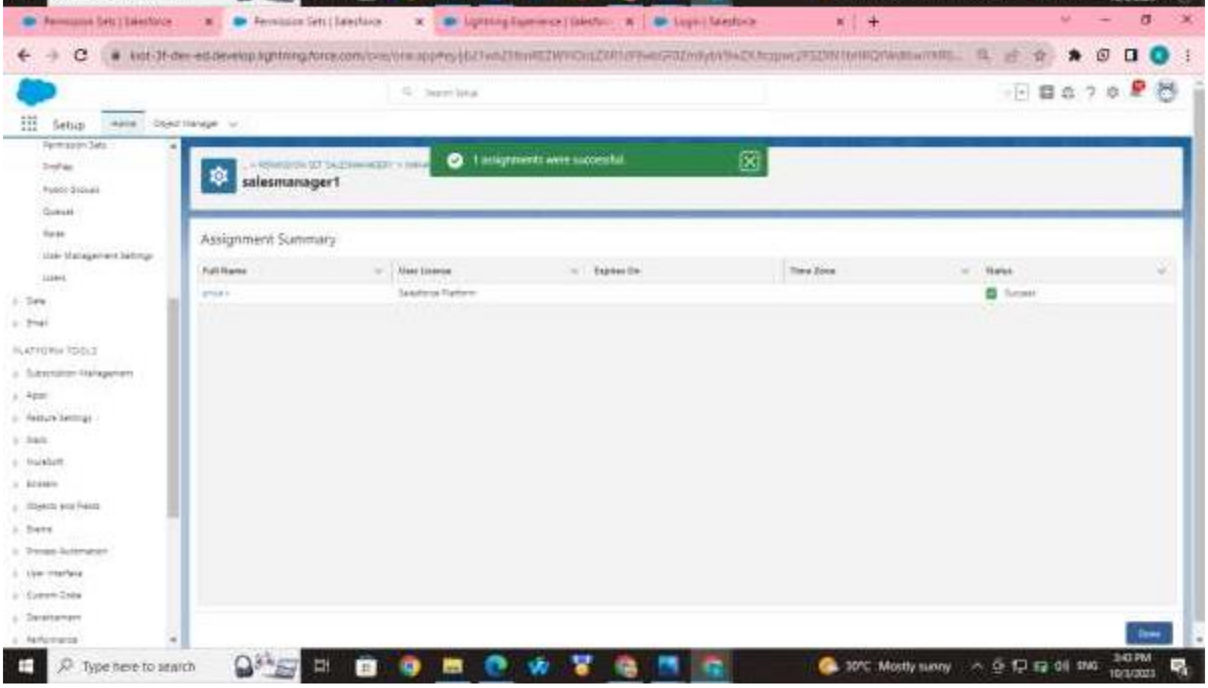

Setup
Home
Object Manager
Permission Sets
salesmanager1
Clone
Delete
Edit Properties
Manage Assignments
Permission Set Overview
Apps
Assigned Apps
Assigned Connected Apps
Object Settings
Type here to search

Setup
Home
Object Manager
Permission Sets
salesmanager1
Clone
Delete
Edit Properties
Manage Assignments
Object Settings
Object Name
Object Permissions
Total Fields
Tab Settings
Accounts
No Access
Type here to search

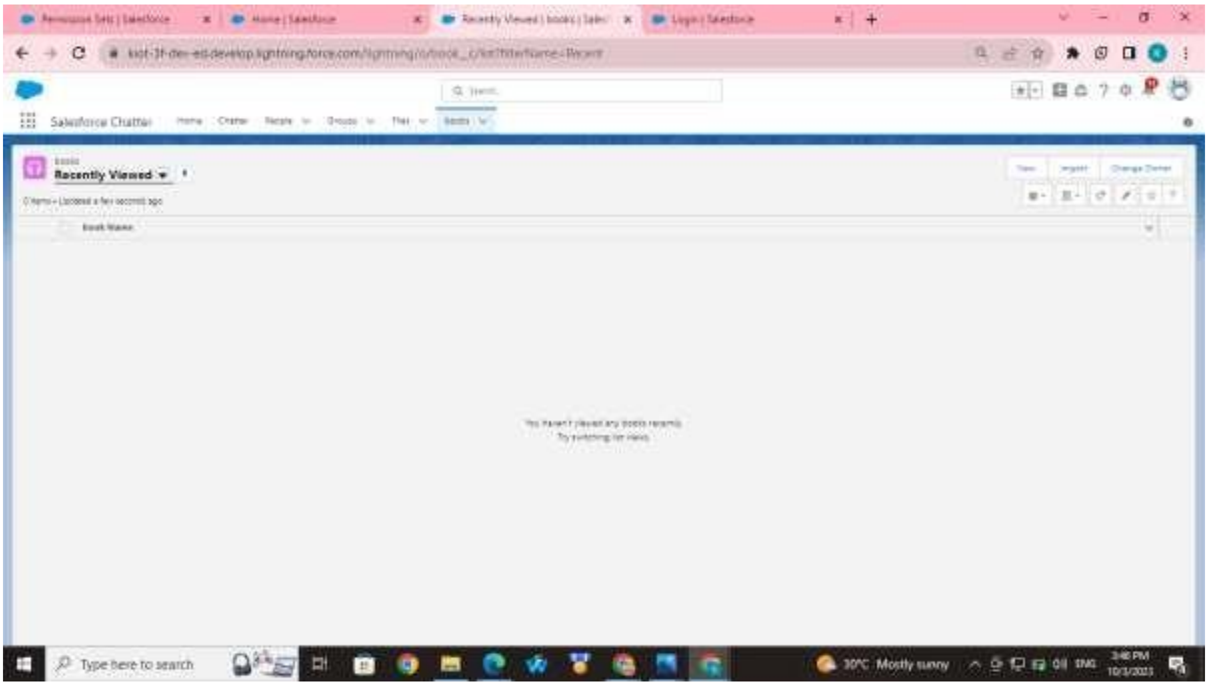

Setup
Home
Object Manager
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Data
Email
PLATFORM TOOLS
Subscription Management
Apps
Feature Settings
Slack
MuleSoft
Einstein
SETUP
Permission Sets
salesmanager1
Clone
Delete
Edit Properties
Manage Assignments
books
Edit
Tab Settings
Available
Visible
Object Permissions
Permission Name
Enabled
Read
Create
Edit
Delete
Type here to search
30°C Mostly sunny

Setup
Home
Object Manager
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Data
Email
PLATFORM TOOLS
Subscription Management
Apps
Feature Settings
Slack
MuleSoft
Einstein
SETUP
Permission Sets
Available
Visible
Object Permissions
Permission Name
Enabled
Read
Create
Edit
Delete
View All
Modify All
Field Permissions
Field Name
Read Access
Edit Access
Created By
Type here to search
30°C Mostly sunny


Setup
salesmanager1
Current Assignments
Add Assignment
No assignments defined.
PLATFORM TOOLS
Type here to search


Setup
salesmanager1
Select Users to Assign
All Users
PLATFORM TOOLS
Type here to search


Select an Expiration Option For Assigned Users
Selected Users
Type here to search
30°C Mostly sunny


1 assignments were successful.
salesmanager1
Assignment Summary
Type here to search
30°C Mostly sunny

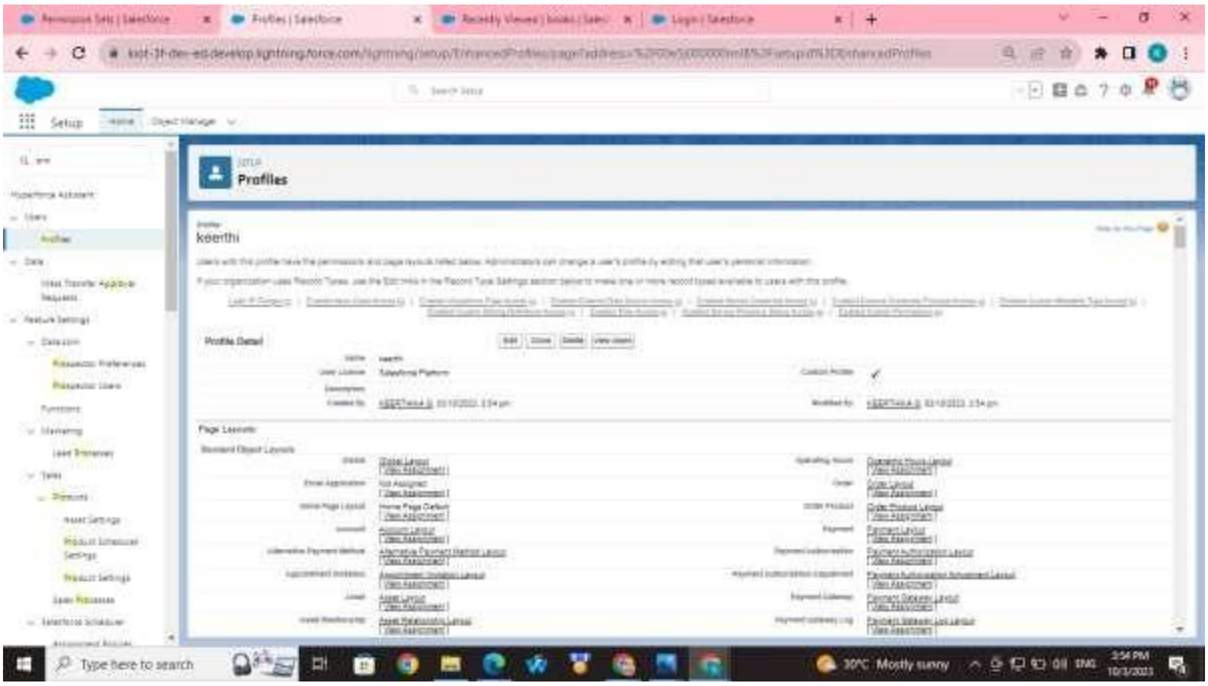


3. Suppose there are 2 Users and they are having Create, Read, Edit access on Account Object with the same profile but we want to open up the access for one user to delete how will you implement the Security setting.

Solution:

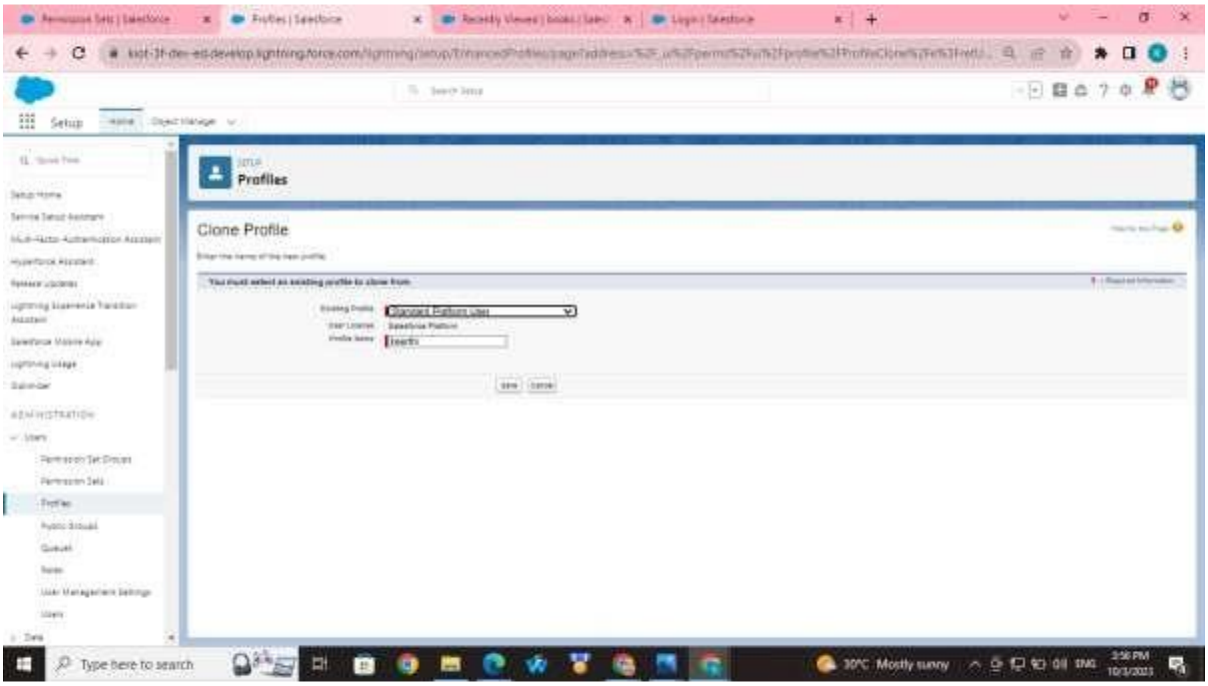
Step 1: we need create a profile for the two user which has the access to Create, Read, Edit for follow as per.

<u>Setup-quick search[profile]</u>



Step 2:

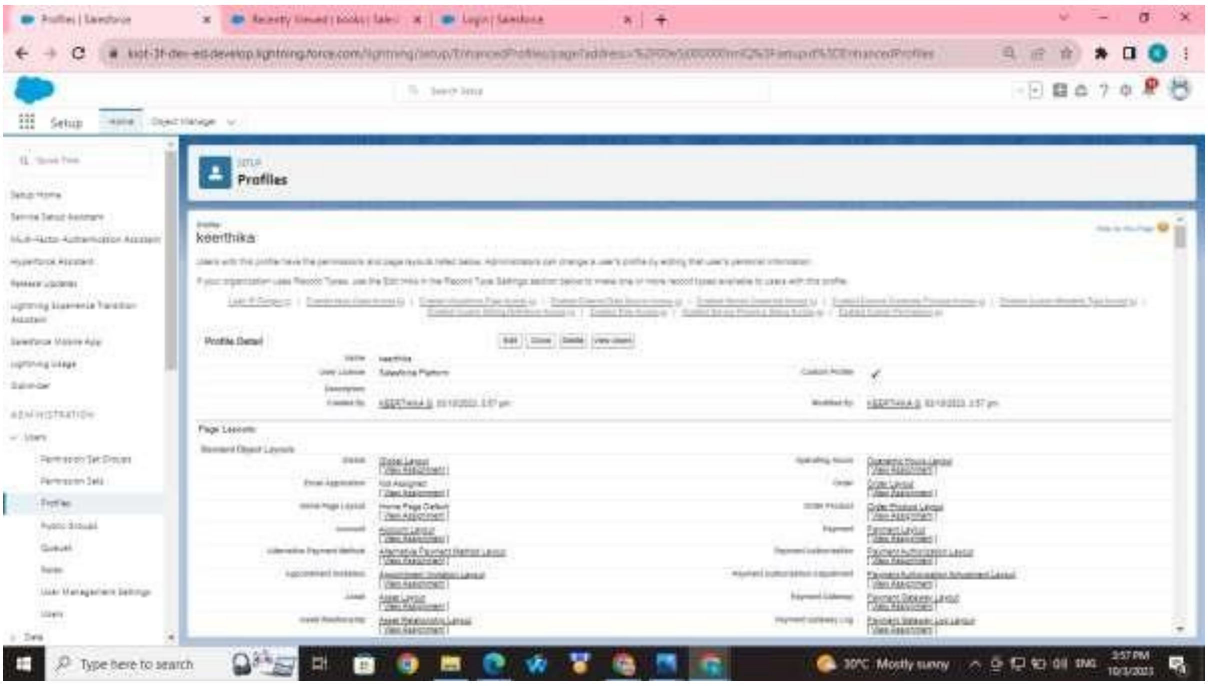
Click on the new to create a new profile along with the label and Api

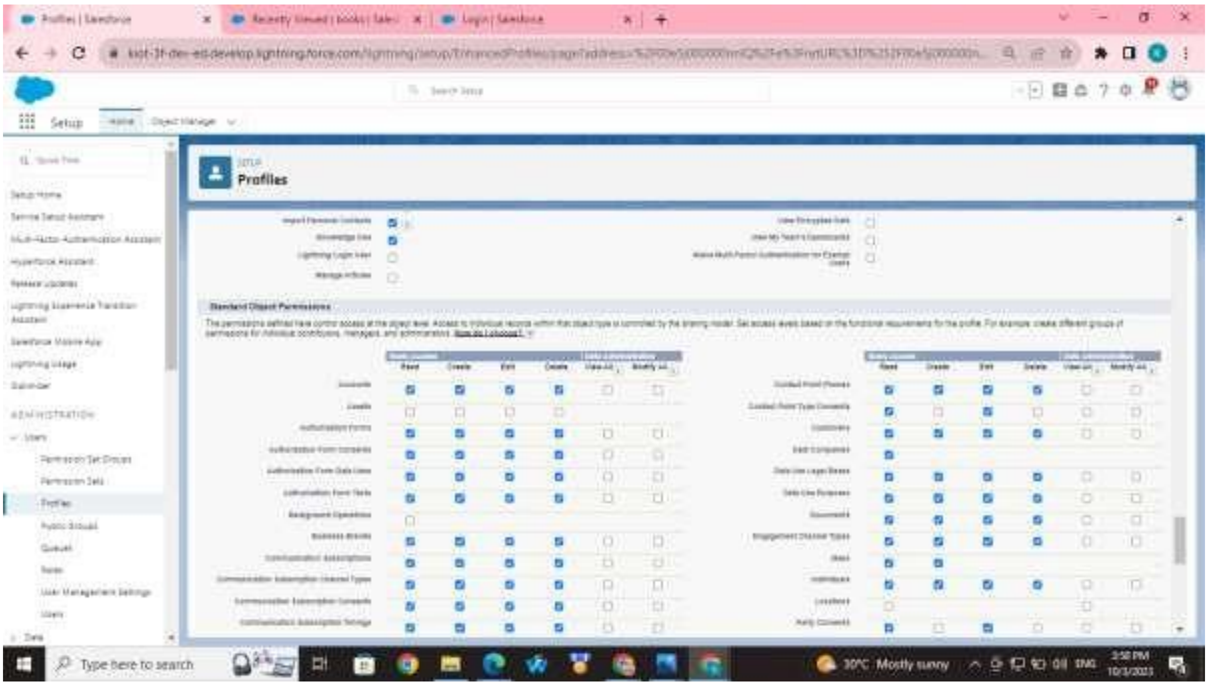


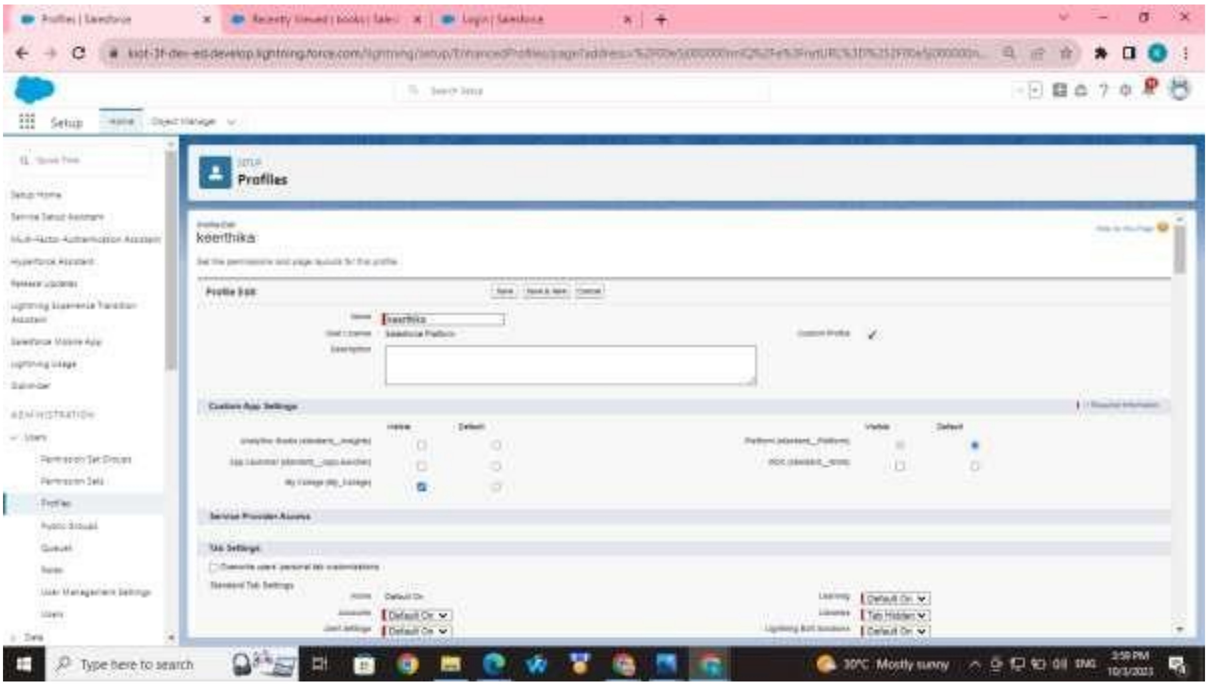
Here I had made it my profile name as Jaga and the existing profile as Standard Platform User.

Step 3:

Now click on the edit and scroll down to custom object settings and enable the read,create,edit and view options. After that click on save.

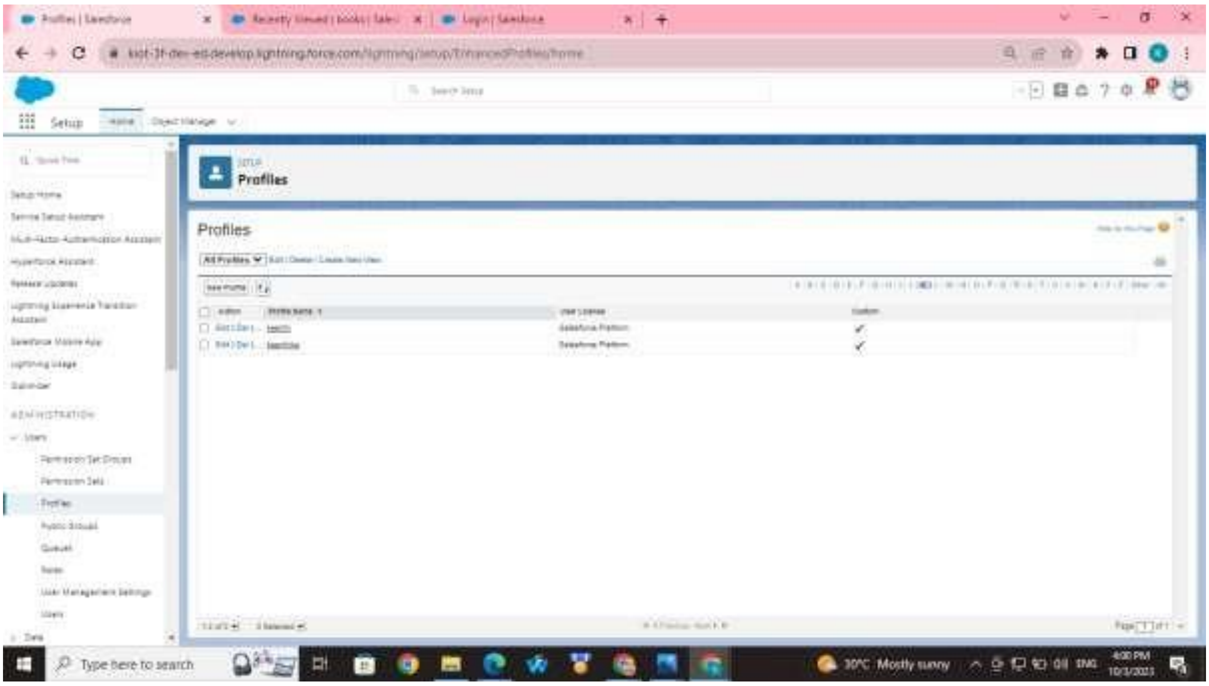






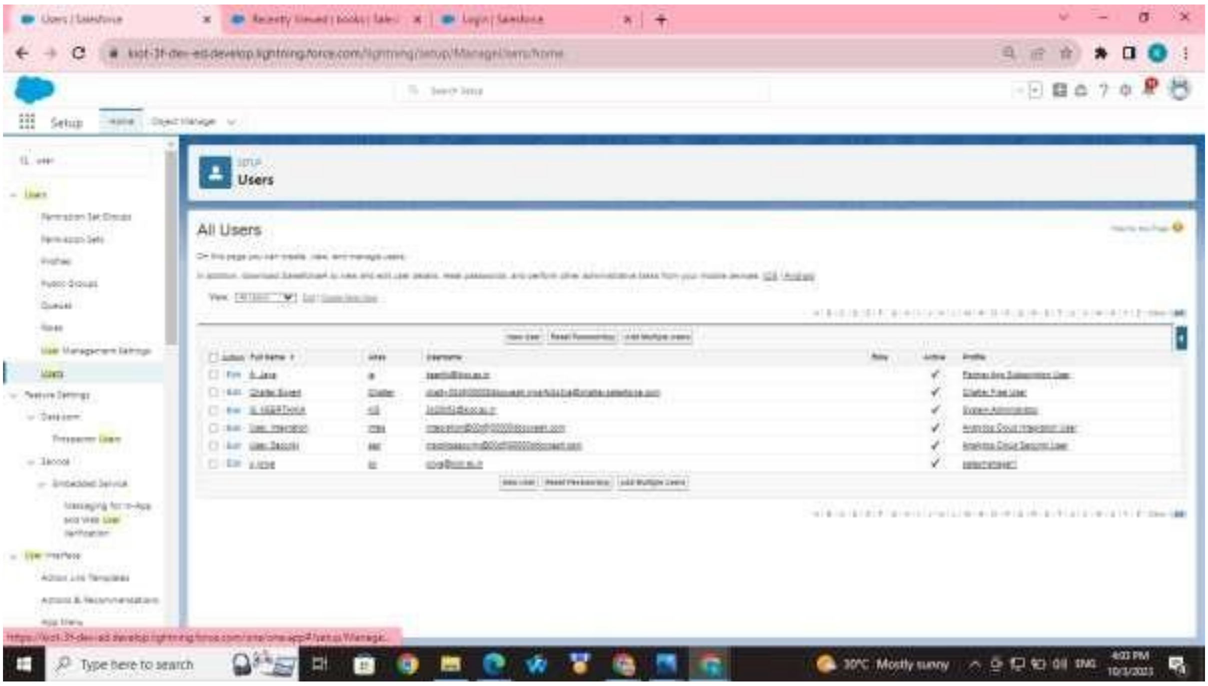
Step 4

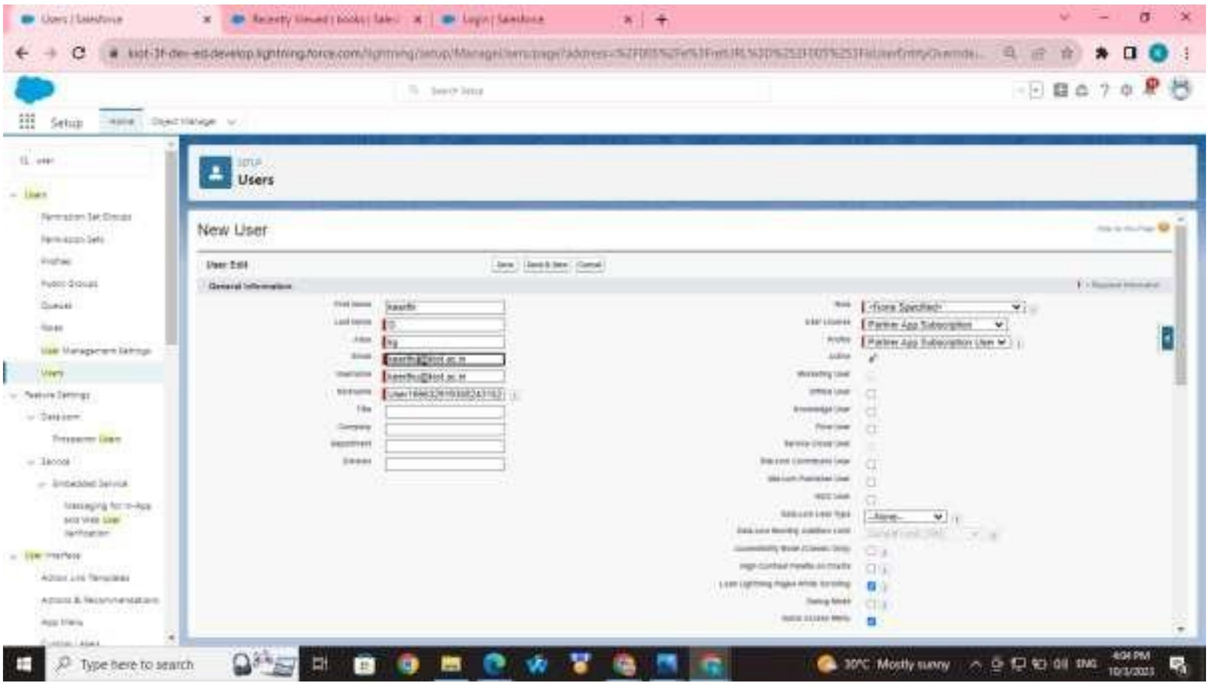
Now you can preview your created profile on the profile option here my profile name jaga has been created with the access of read,create,edit along with view on it



Step 5:

Now create two users by enter into the Setup-quick search[user] and then click on new user after clicking that you need to create two user along with the profile as Jaga which we have created on the step 2.once the one user has been created click on the save&new so that you can create the second user and there the user name can been created with alternate name but with the same user profile and once the two user are create click on save.



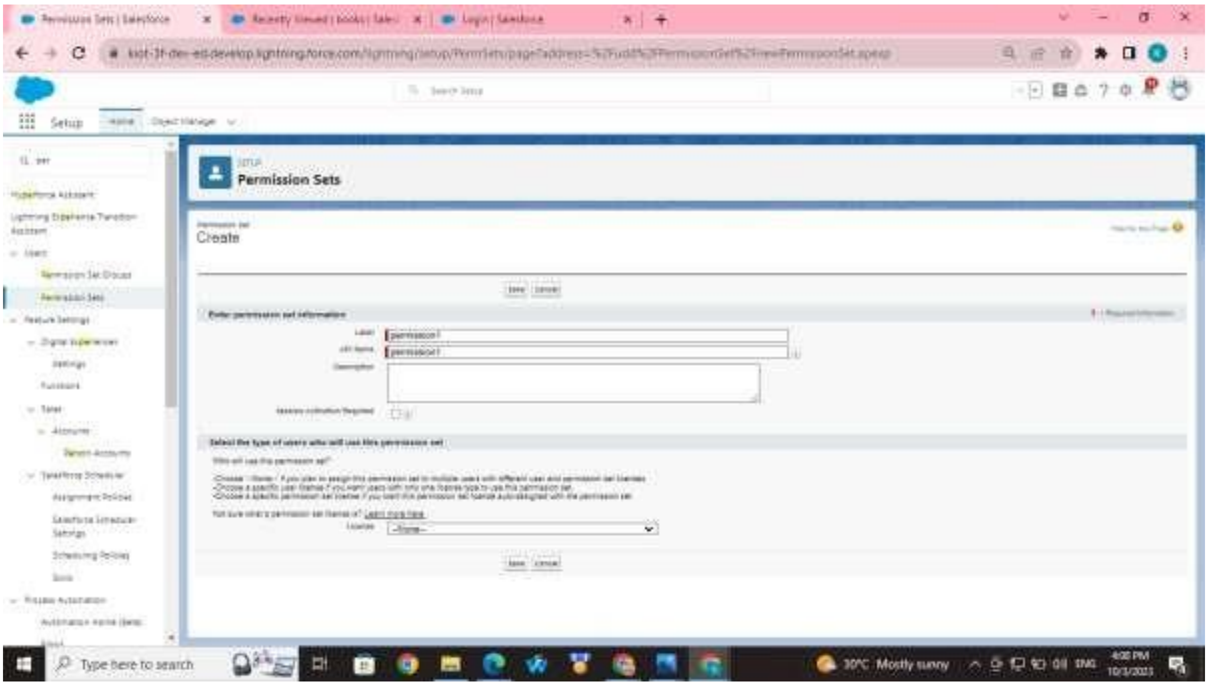


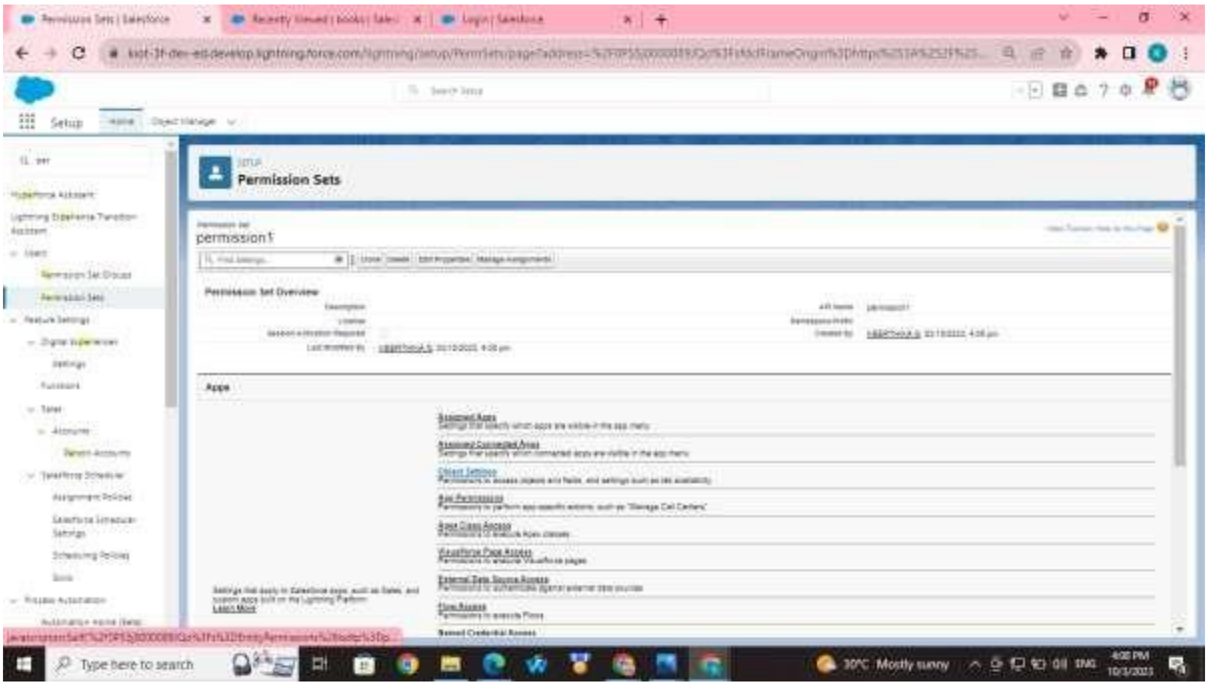
Now you can preview your two user that you have created in my side I had create the two users a Jagadesh11 and Jagadesh22 as a director channel sales with the marketing team.

Step 6:

Now the two user as been created with the profile so that two user can perform the Create, Read, Edit and view on both the user. So as per the given task we need to allocate a specific access as delete on one user for that we need create a permission set for one user so it can created as

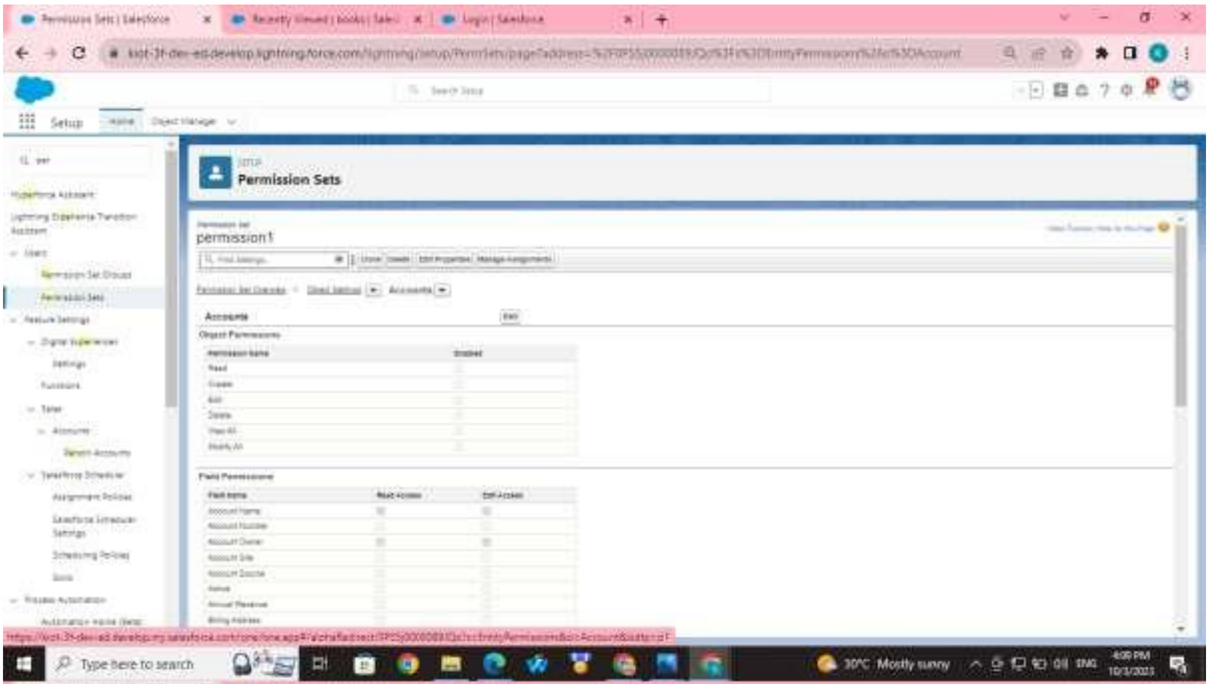
setup-quick search[permission set]-new-fill label name [auto select the API name]-click on save-object settings-accounts.

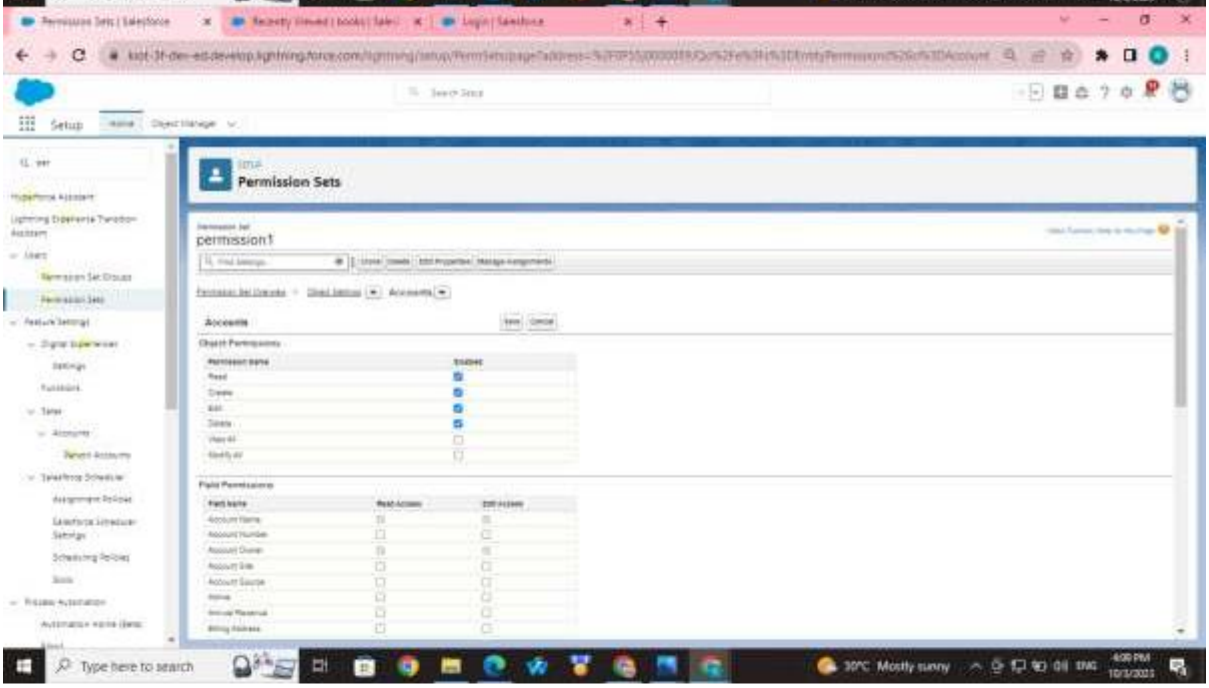




Step 7:

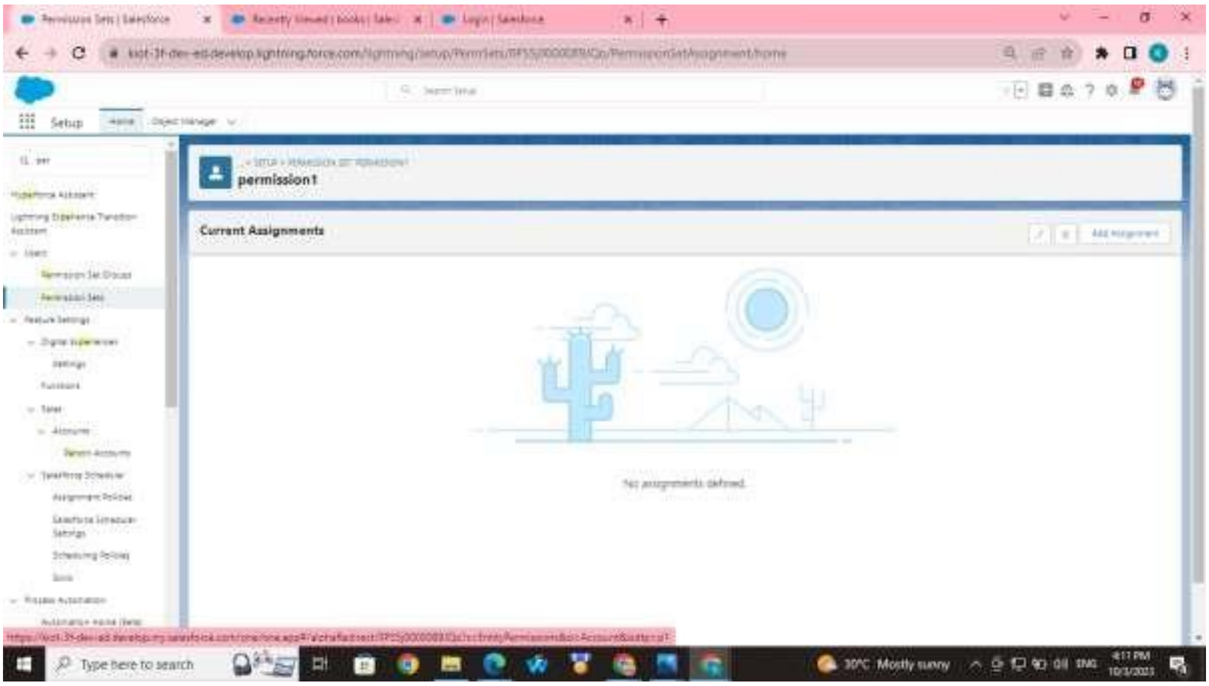
Now to give the specific delete access to the user click on edit on the Account and then enable the read,create,edit and the delete on it so that the permission set will have a specific special access on it. once it has been done click on save and then click on manage assignment.

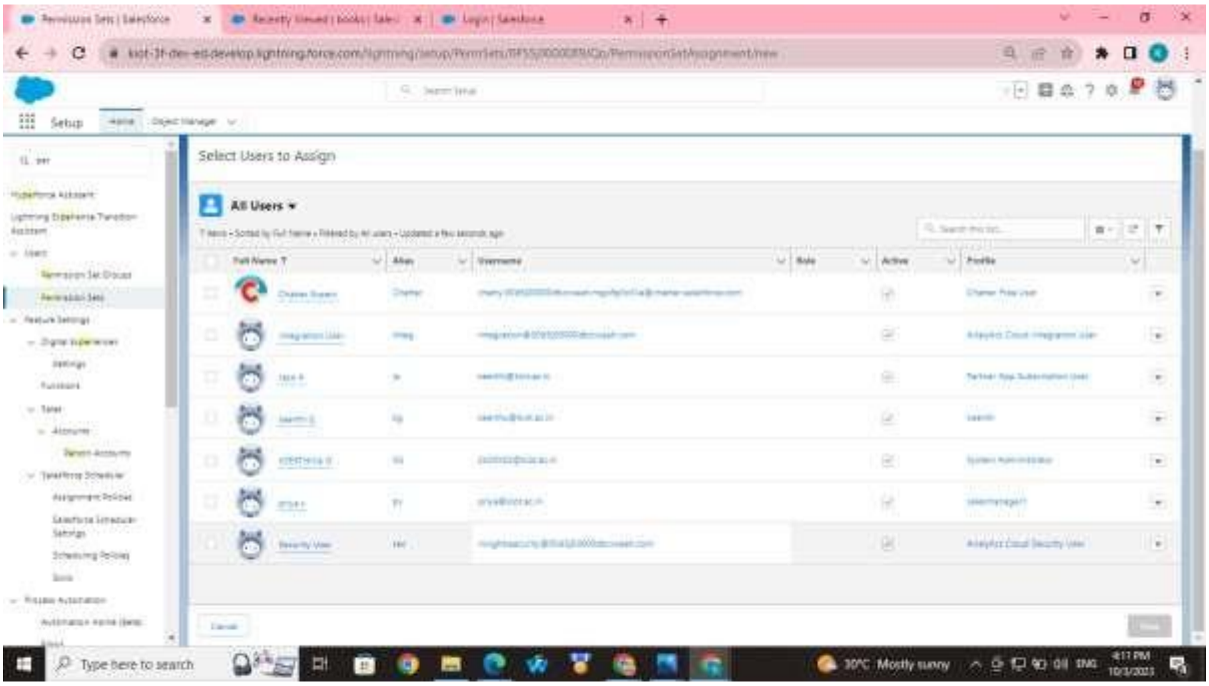

Permission Sets
permission1
Accounts
Type here to search
30°C Mostly sunny


Permission Sets
permission1
Accounts
Type here to search
30°C Mostly sunny

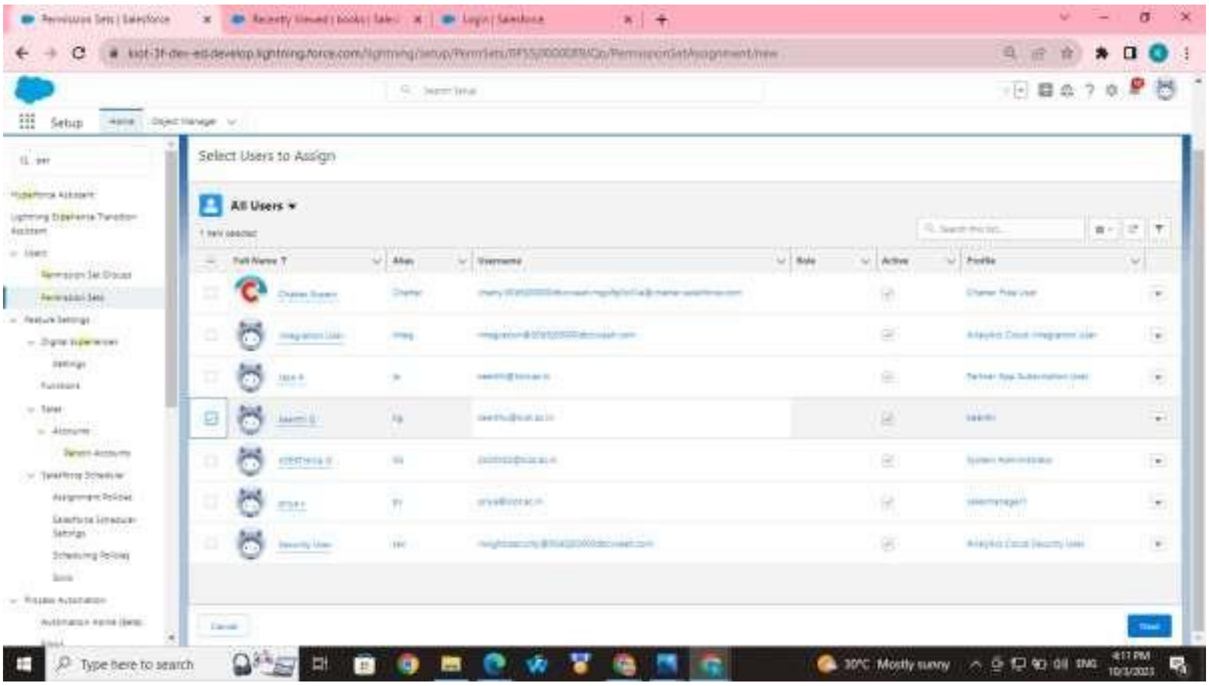
Step 8

Now click on add assignment there you will find your two created users click on any one user to give a special access as delete on it and then click on assign so that the specific selected user can have a special access as delete on it.

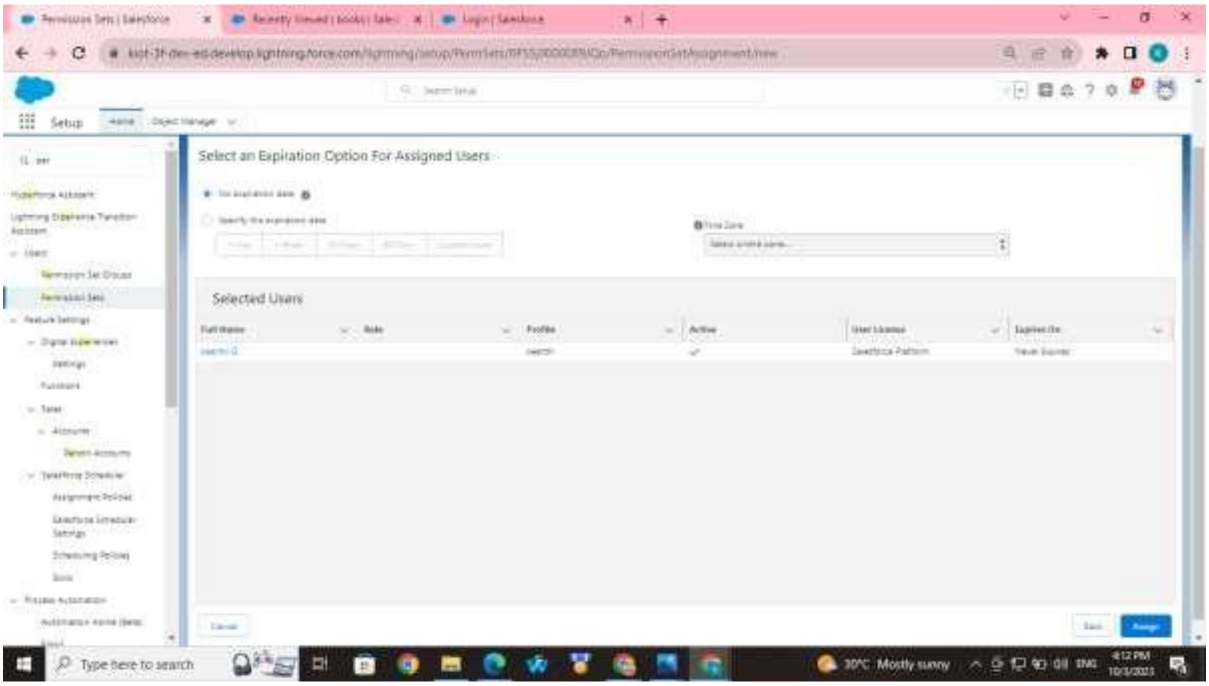


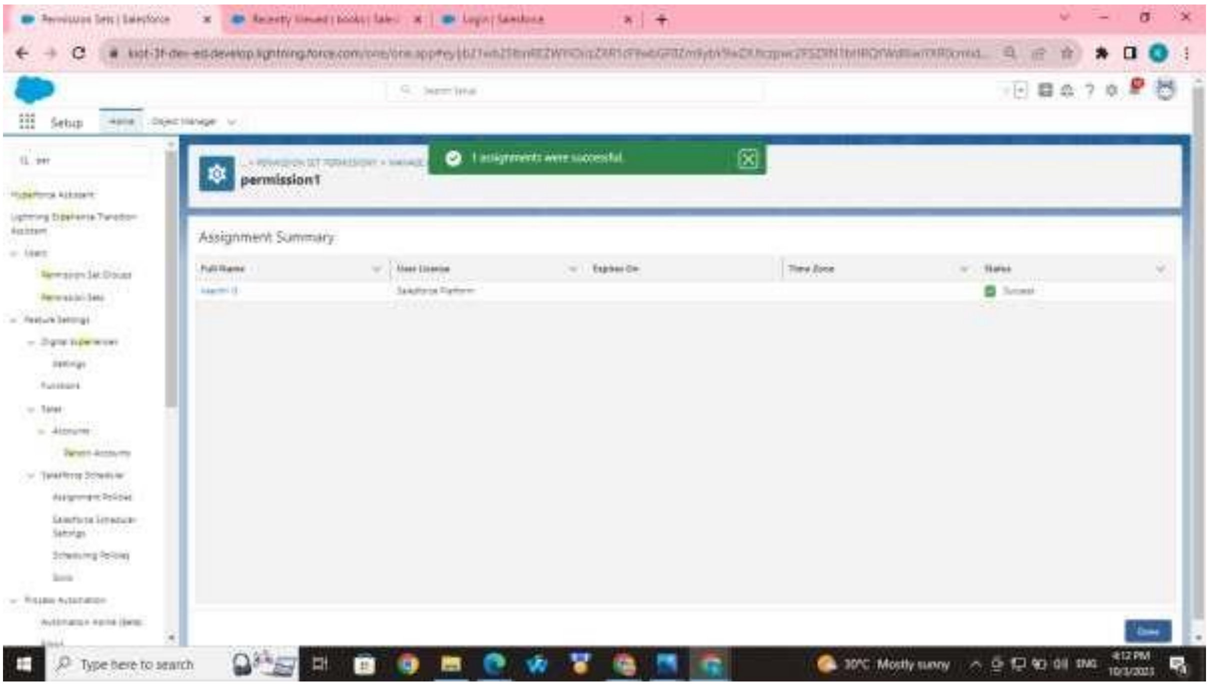


Click on next



Now click on Assign.





Now the specific access for the Jagadesh11 user has been assigned successfully.

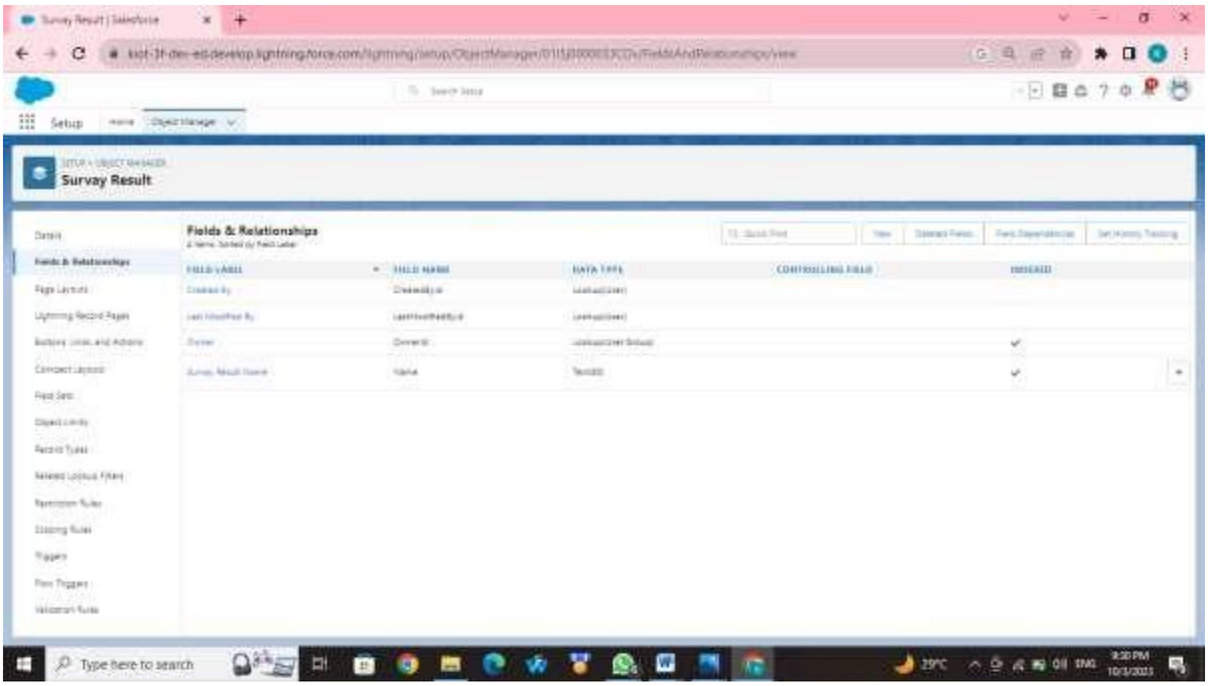
4.Create a screen flow for a basic survey to fill in the details for any form.

Solution:

Step 1: Create a Custom Object

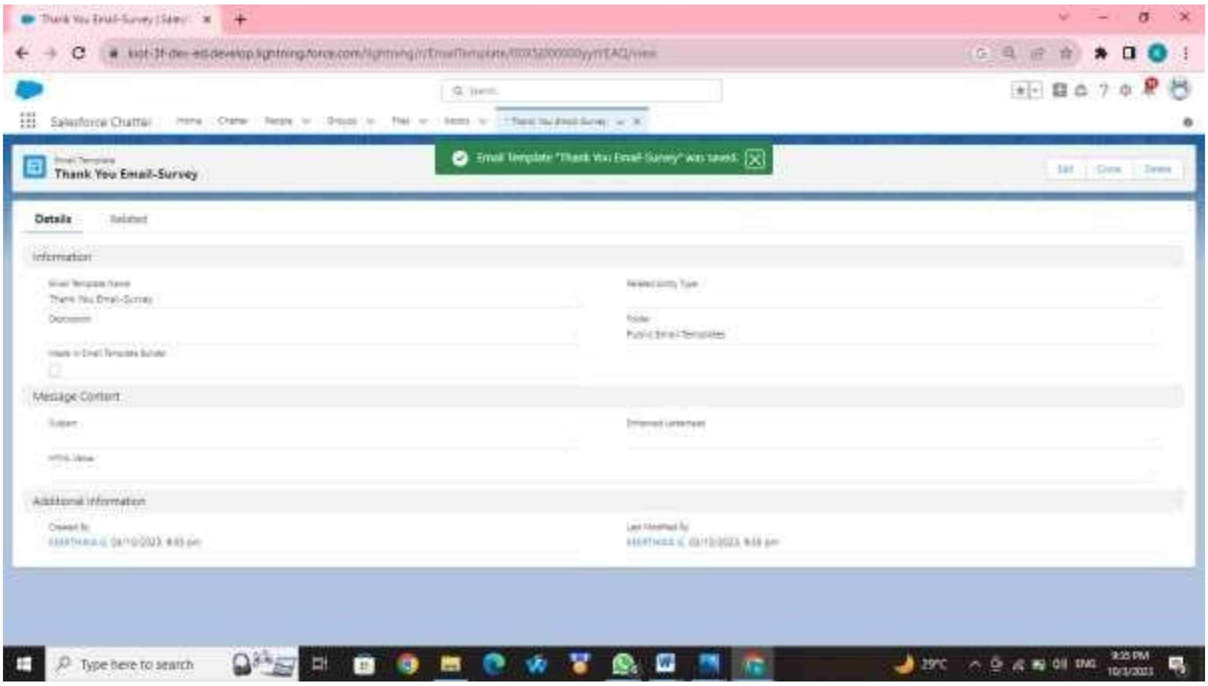
The next step is to create a custom object **Survey Result** and a few custom fields to store survey responses.

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.**



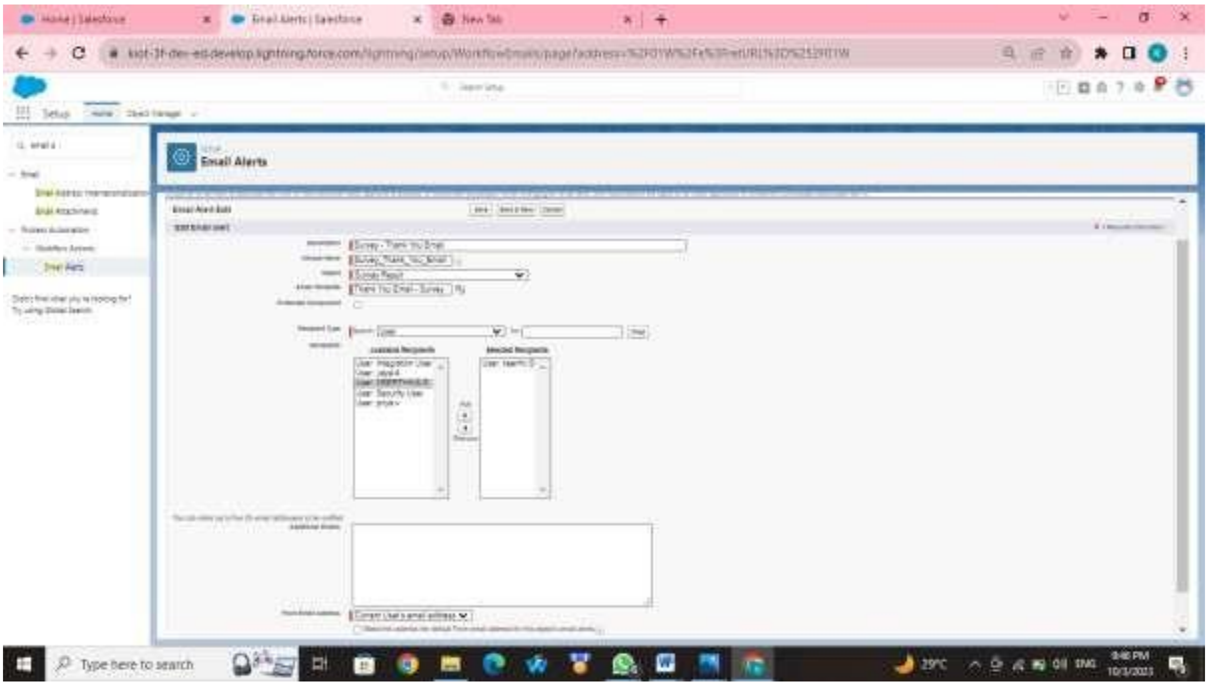
Step 2: Create a Thank You For Survey Lightning Email Template

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

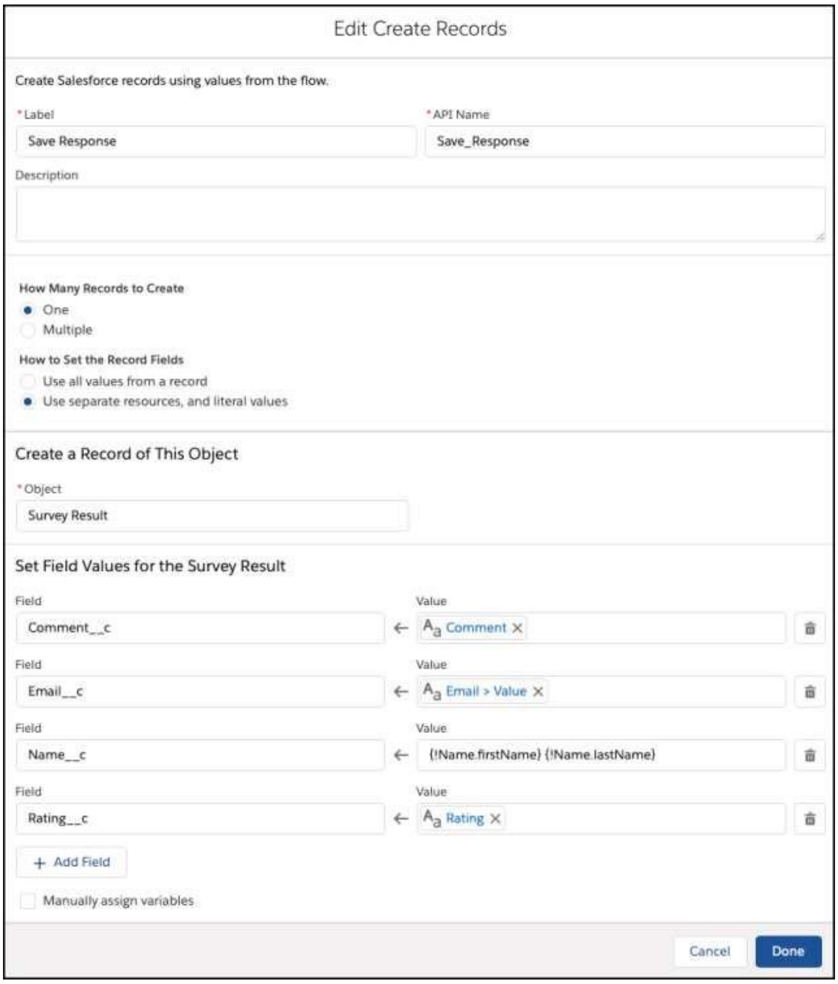
1. Click **Setup**.
2. In the Quick Find box, type **Flows**.
3. Select **Flows** then click on the **New Flow**.
4. Select the **Screen Flow** option and click on **Next** and configure the flow as follows:
    1. **How do you want to start building**: **Freeform**
5. We will use the **Screen** element 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** object from the dropdown list.
6. **Set Field Values for the Survey Result**
    1. Row 1:
        1. **Field: Comment__c**
        2. **Value: {!Comment}**
    2. Click **Add Row**
    3. Row 2:
        1. **Field: Email__c**
        2. **Value: {!Email.value}**
    4. Click **Add Row**
    5. Row 3:
        1. **Field: Name__c**
        2. **Value: {!Name.firstName} {!Name.lastName}**
    6. Click **Add Row**
    7. Row 3:

1. **Field: Rating__c**
2. **Value: {!Rating}**

7. Click **Done**.

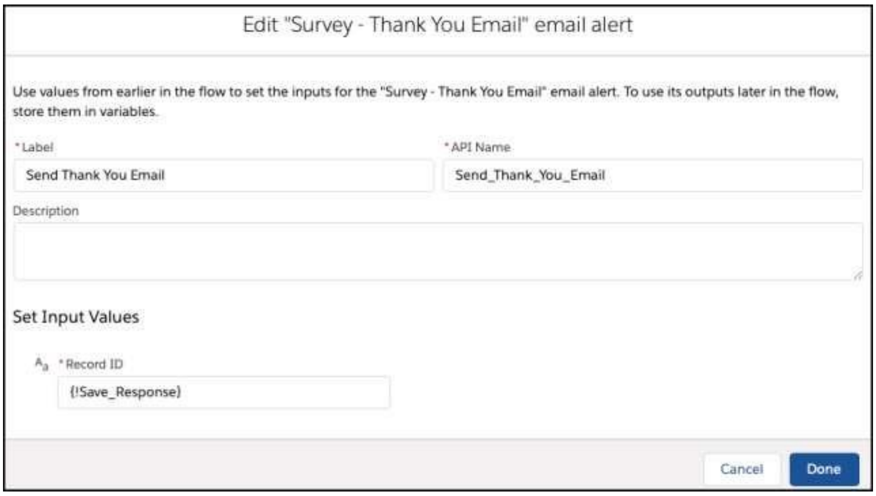


Step 4.3: Salesforce Flow — Call an Acton — Email Alert to Send Out Thank You Email

The next step is to call the **Survey – Thank You Email** email alert from flow so that when flow fires it triggers the thank you email to survey participants.

1. Under **Toolbox**, select **Element**.

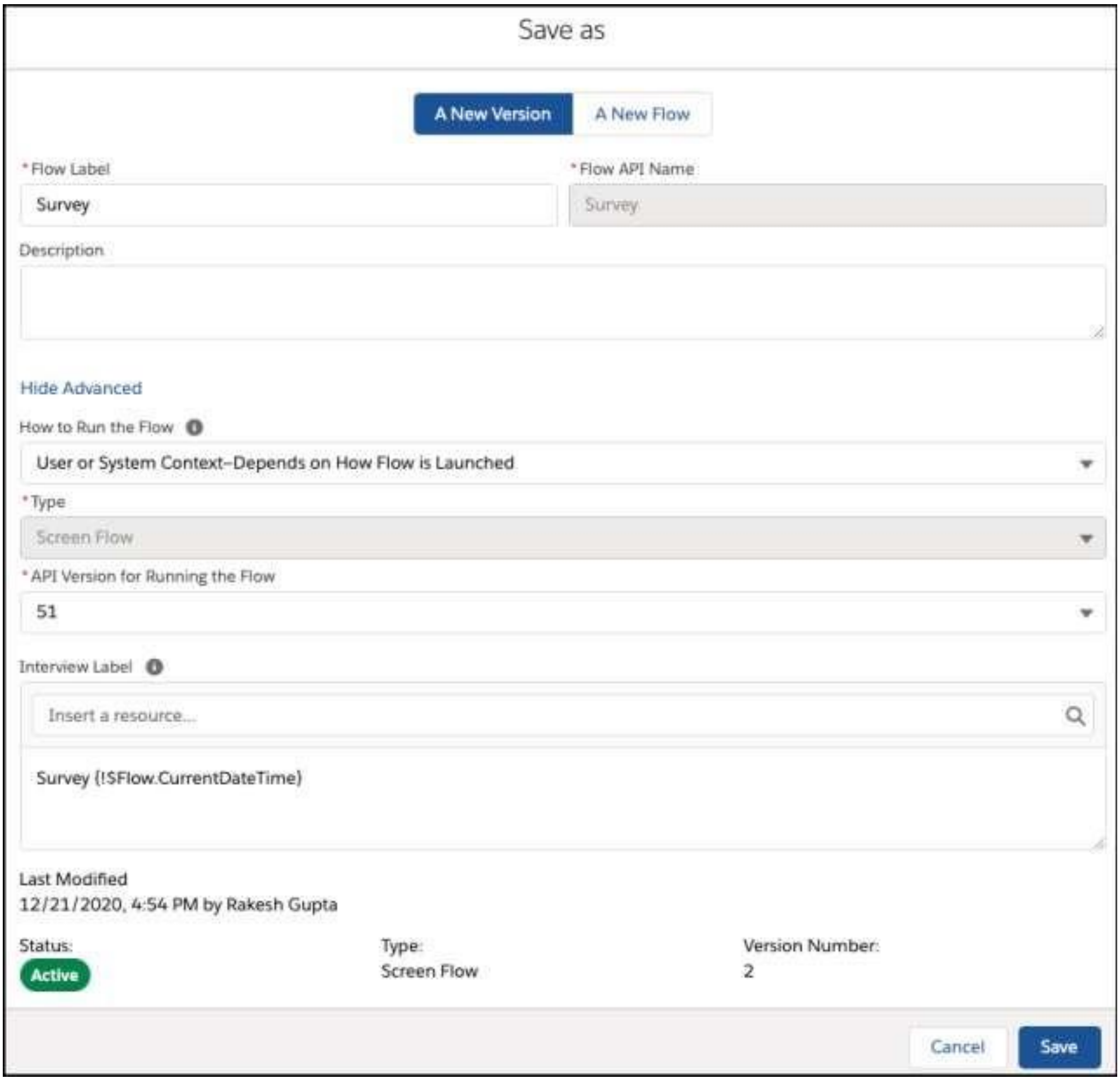
2. Drag-and-drop **Action** element onto the Flow designer.
3. In the **Action** box, type **Survey – Thank You Email**.
4. Clicks on the **Survey – Thank You Email** email alert.
5. Click **Done**.



In the end, Sergio's **Flow** will look like the following screenshot:

1. Click **Save**.

2. Enter **Flow Label** the **API Name** will auto-populate.
3. Click **Show Advanced**.
4. **How to Run the Flow**: **User or System Context—Depends on How Flow is Launched**
5. **Type**: **Screen Flow**
6. **API Version for Running the Flow**: **51**
7. **Interview Label**: **Survey {!$Flow.CurrentDateTime}**
8. Click **Save**.

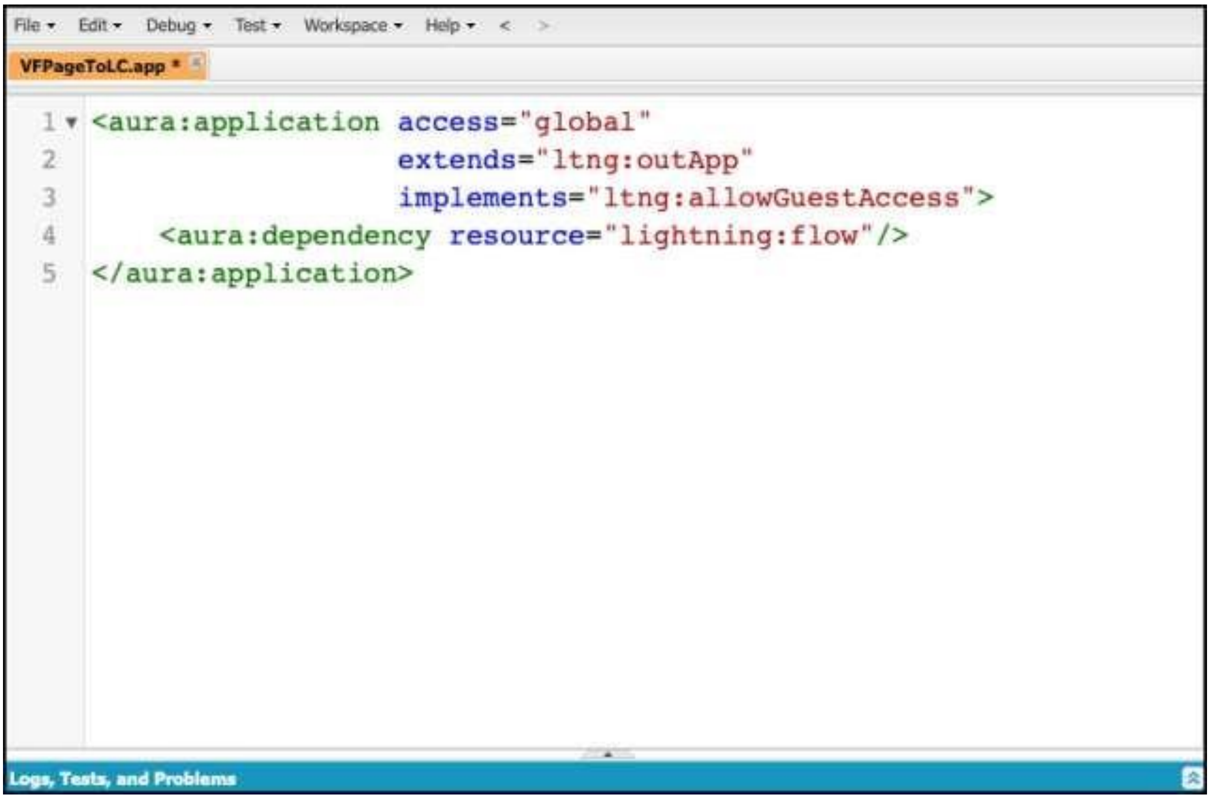


Step 5: Create a Lightning Application to Render Lightning Runtime for Flow in a Visualforce Page

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.

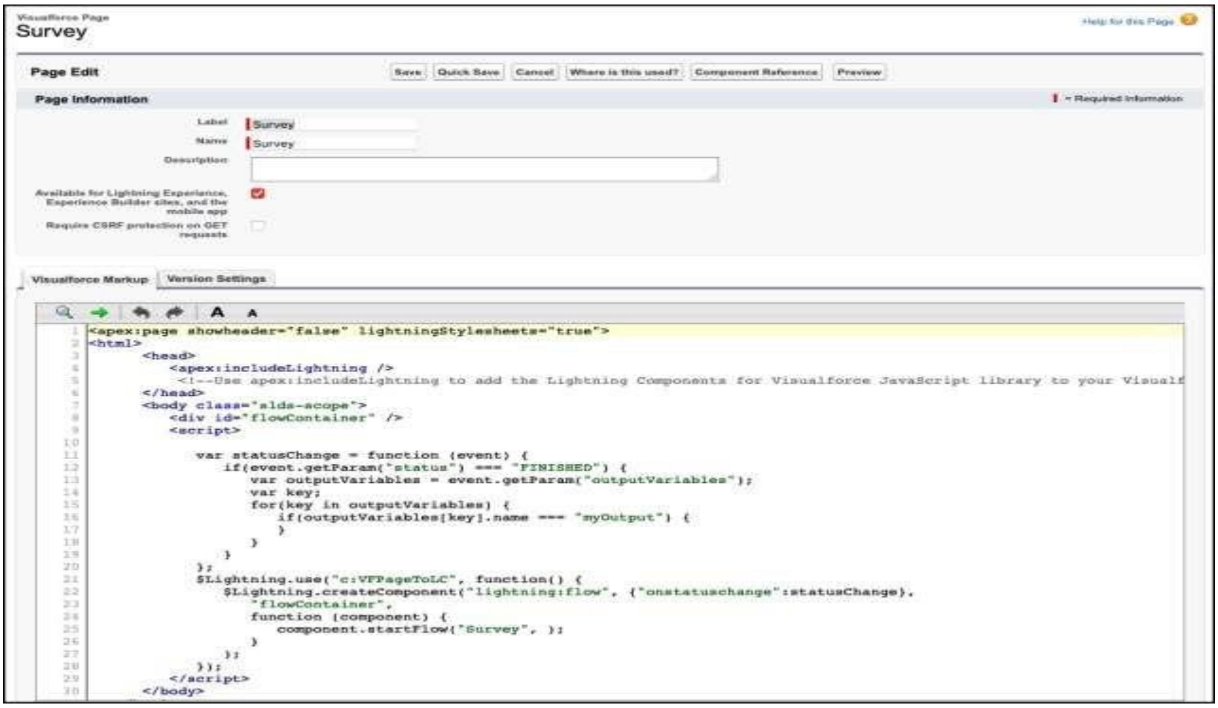


Step 6: Create a Visualforce Page and Embed Your Flow Into It

Now we will create a Lightning Application that declares a dependency on the **lightning:flow** component.

Add the Lightning Components for Visualforce JavaScript library to your Visualforce page using the **<apex:includeLightning/>** component. In the Visualforce page, reference the dependency app. Then write a JavaScript function that creates the component on the page using **$Lightning.createComponent()**

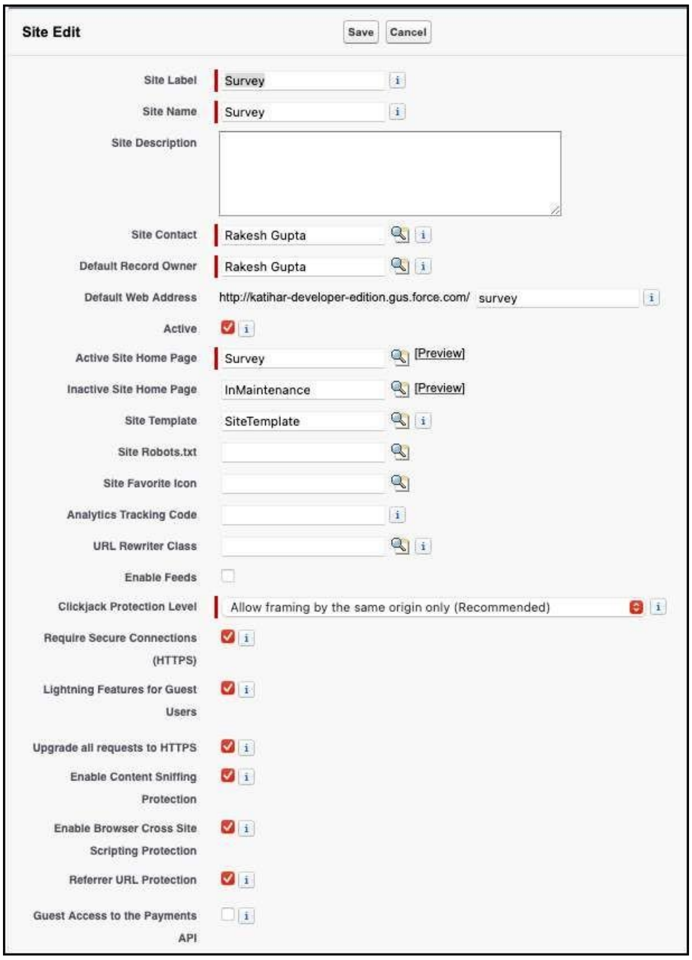
1. Click **Setup**.
2. In the Quick Find box, type **Visualforce Pages**.
3. Clicks on the **New** button.
4. Copy code from **GitHub** and paste it into your visualforce page
5. Click **Save.**



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.

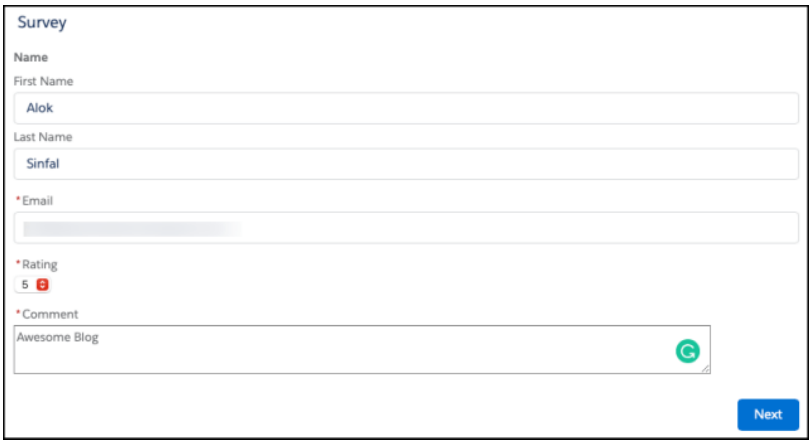
1. Click **Setup**.
2. In the Quick Find box, type **Sites**.
3. Clicks on the **New** button.
4. Fill the details as per the screenshot below:
5. Click **Save.**



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.