NAAN MUDHALVAN
Salesforce Developer(Course)
Assignment no 1

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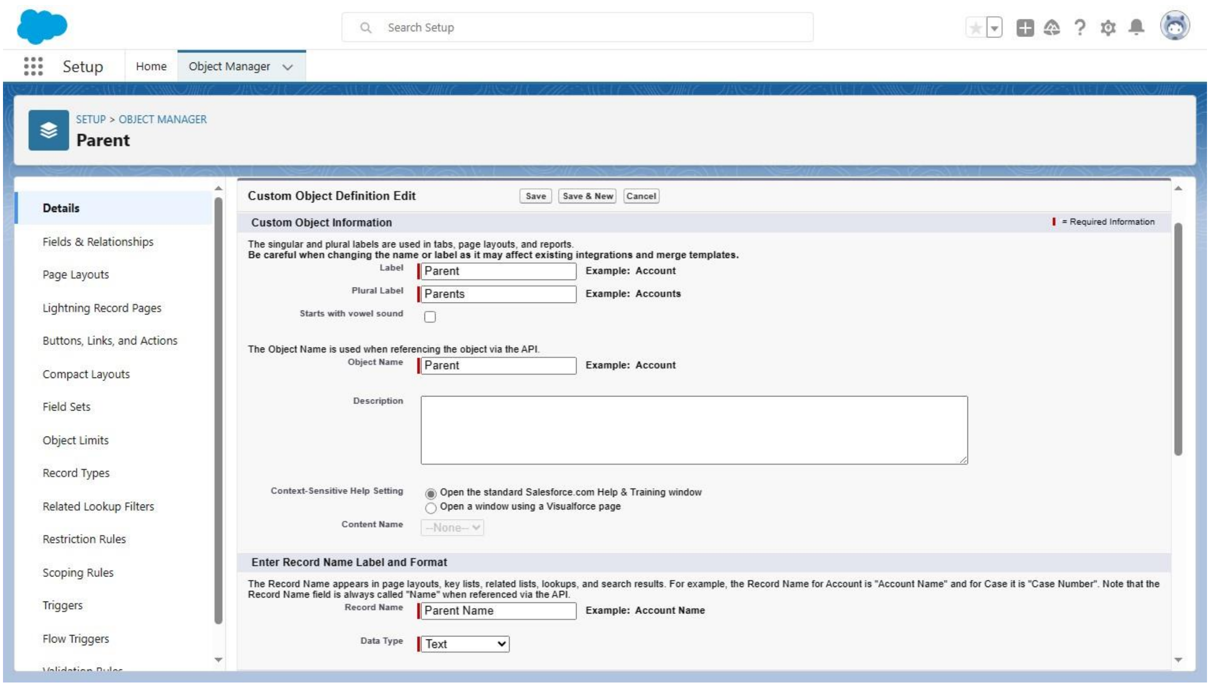
YEAR & DEP : IV YEAR & CSBS

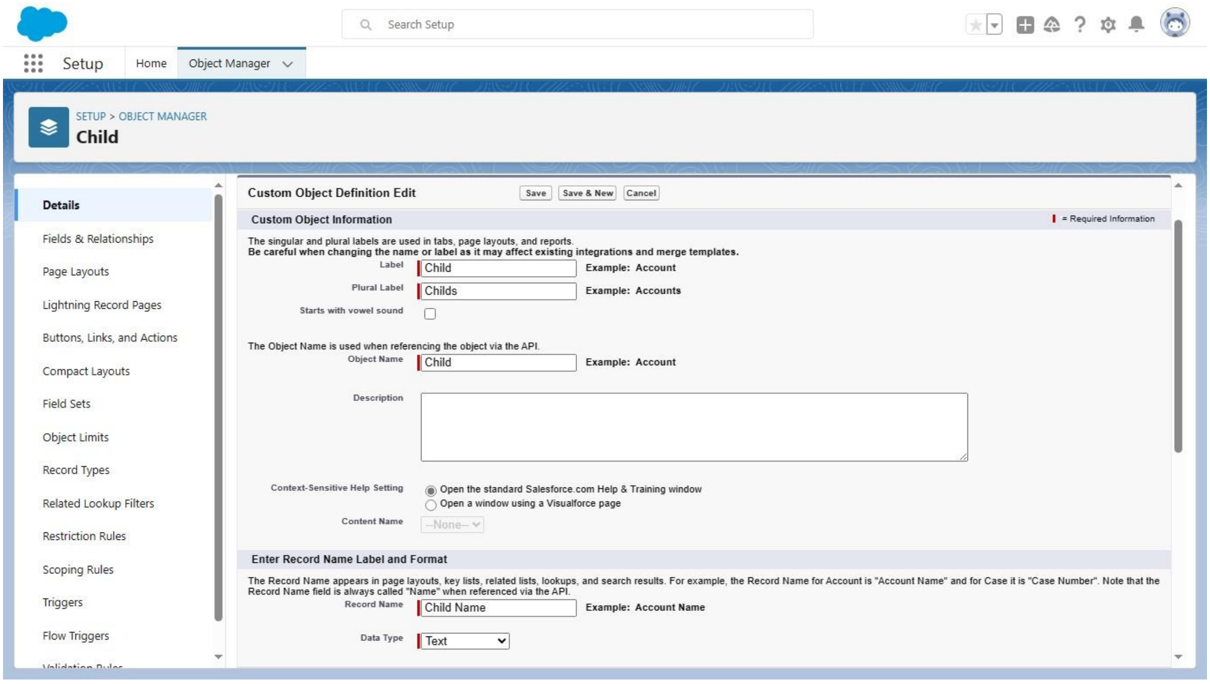
BATCH : 2024

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.

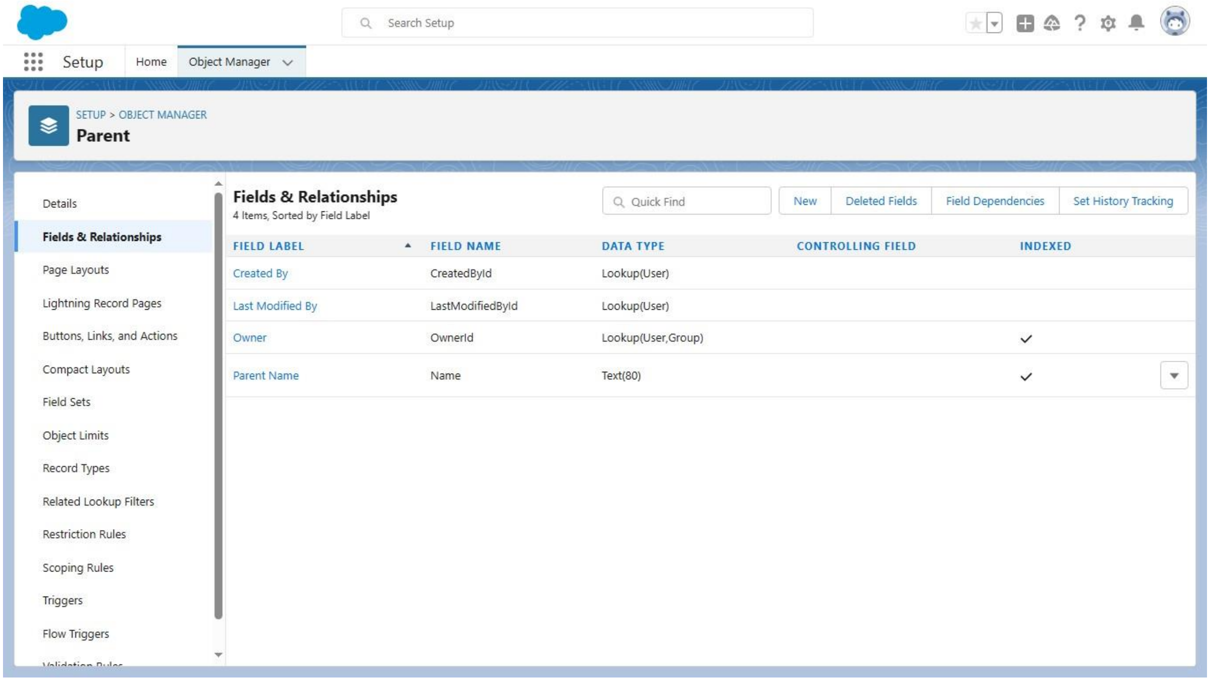
4. In the "Custom Fields & Relationships" section, click "New" under "Related To".

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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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
Fields & Relationships
4 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIELD
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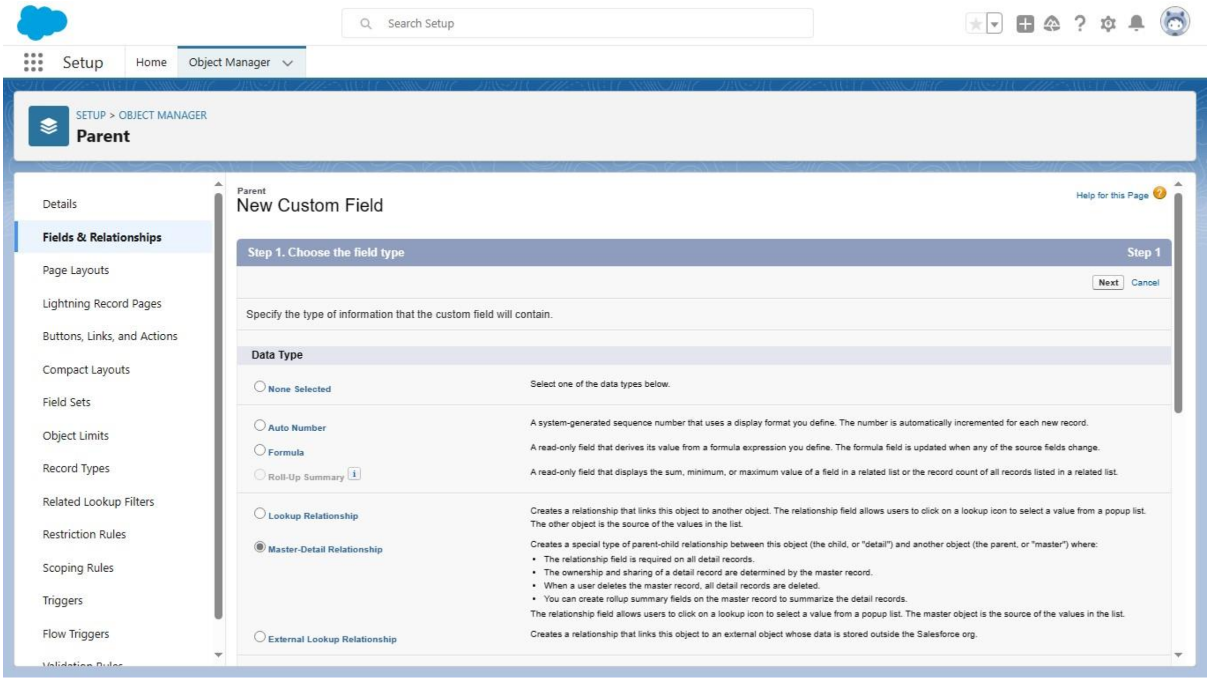
Parent Name
Name
Text(80)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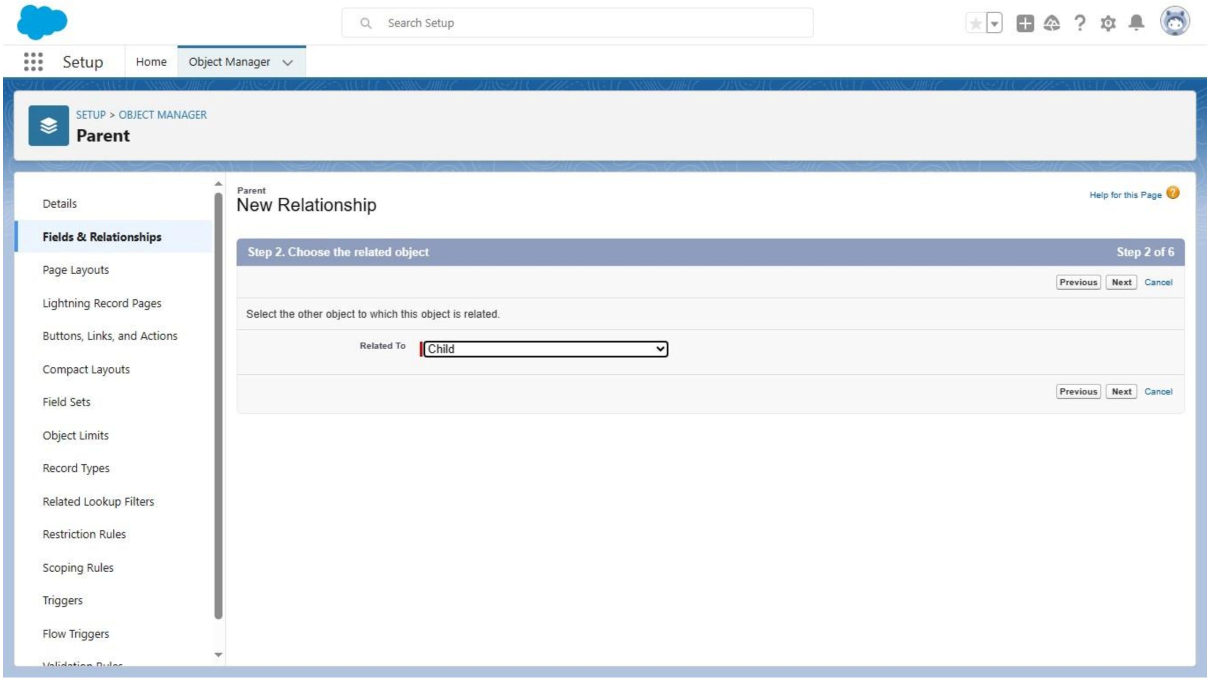
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Triggers
Flow Triggers
Parent
New Custom Field
Help for this Page
Step 1. Choose the field type
Step 1
Next
Cancel
Specify the type of information that the custom field will contain.
Data Type
None Selected
Select one of 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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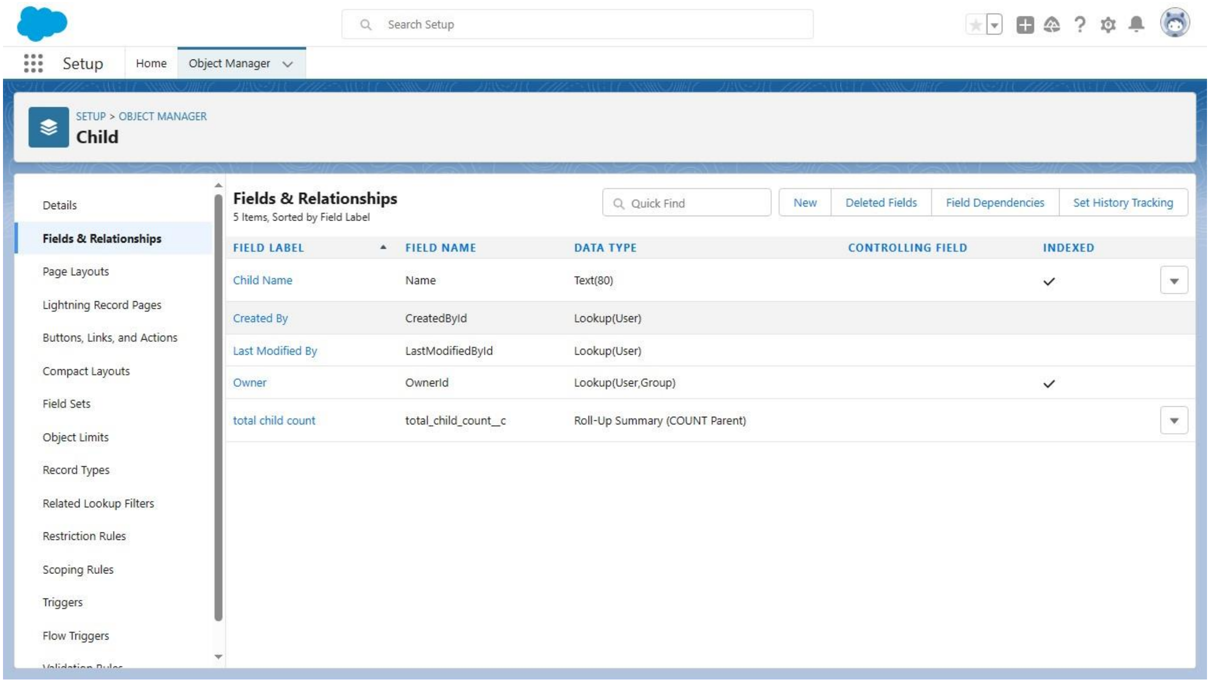
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Triggers
Flow Triggers
Parent
New Relationship
Help for this Page
Step 2. Choose the related object
Step 2 of 6
Previous
Next
Cancel
Select the other object to which this object is related.
Related To
Child
Previous
Next
Cancel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Record Types
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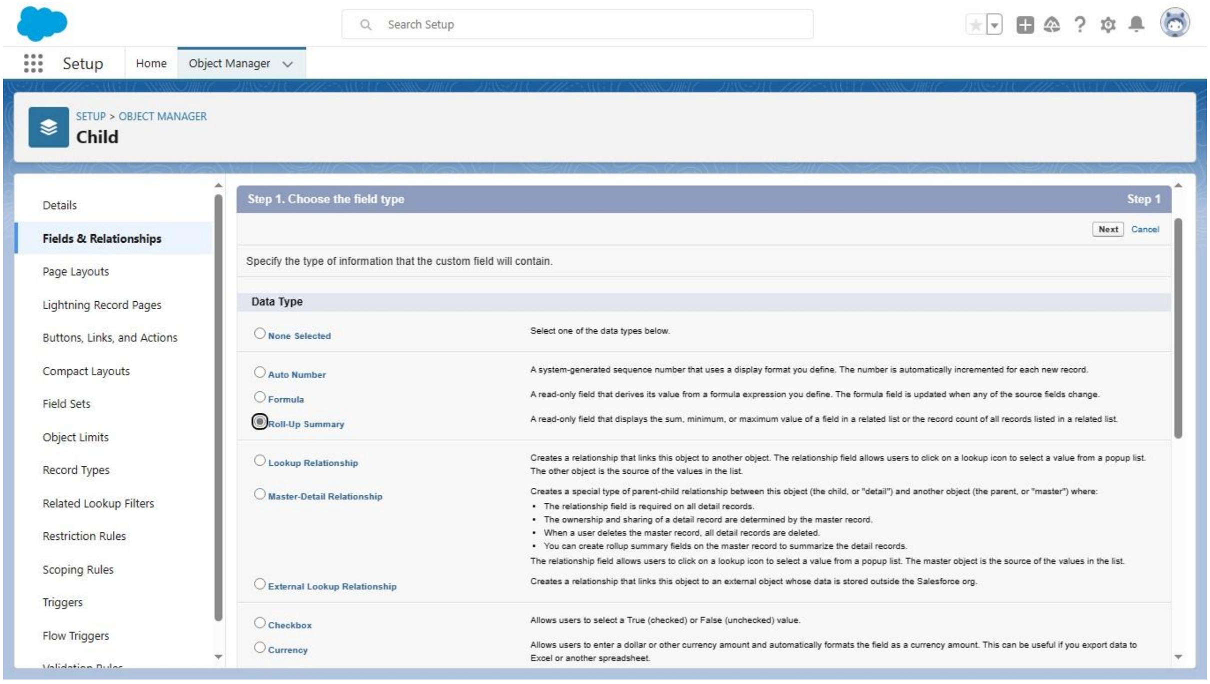
Triggers
Flow Triggers
Fields & Relationships
5 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIELD
INDEXED
Child Name
Name
Text(80)
Created By
CreatedById
Lookup(User)
Last Modified By
LastModifiedById
Lookup(User)
Owner
OwnerId
Lookup(User,Group)
total child count
total_child_count__c
Roll-Up Summary (COUNT Parent)



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."

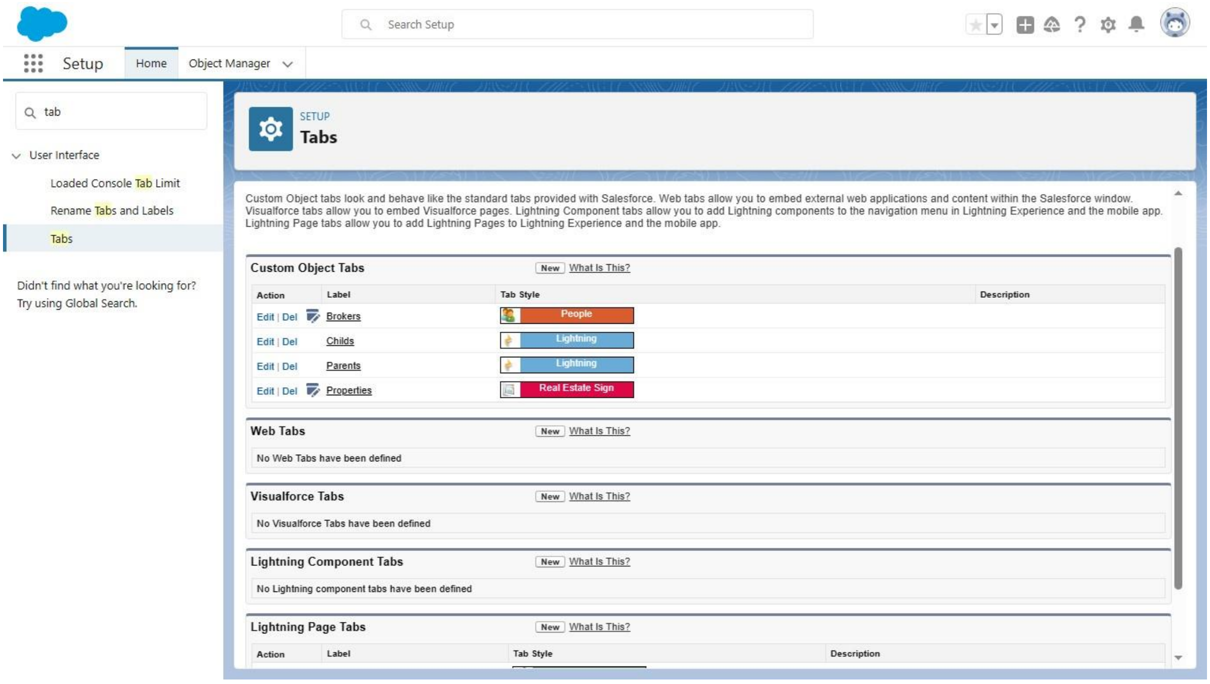
3. Choose the "Child" as the child object for which you want to calculate the total.

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").

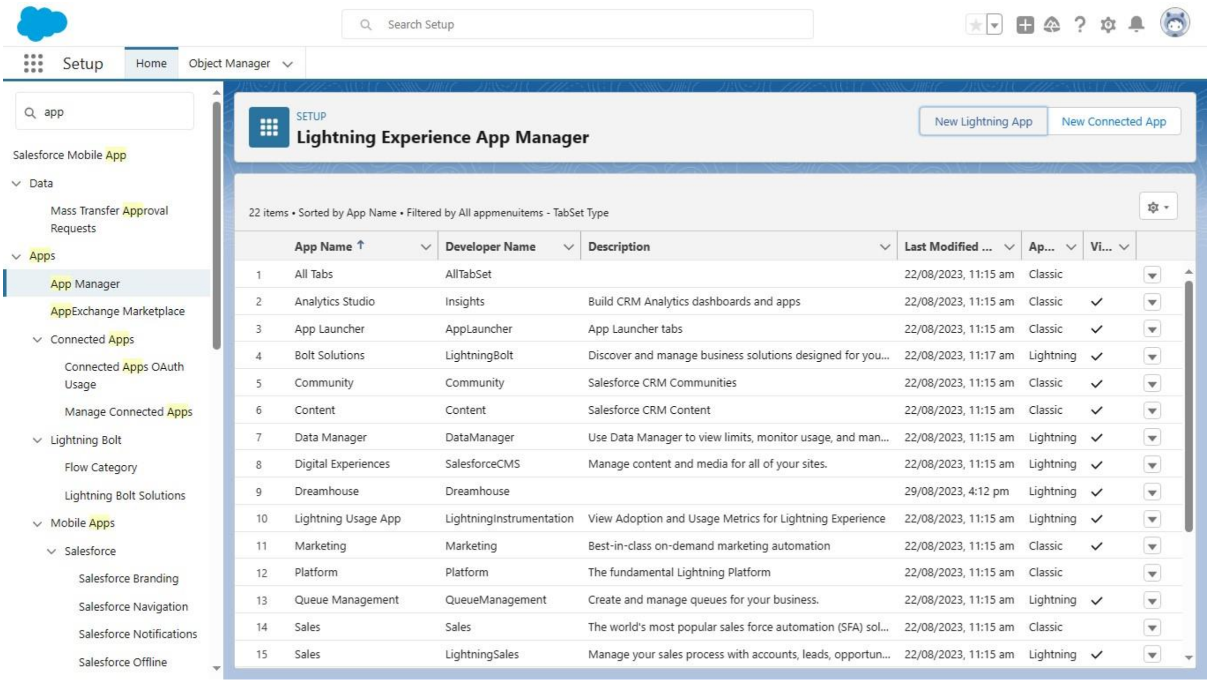
6. Configure any additional filter criteria if needed.

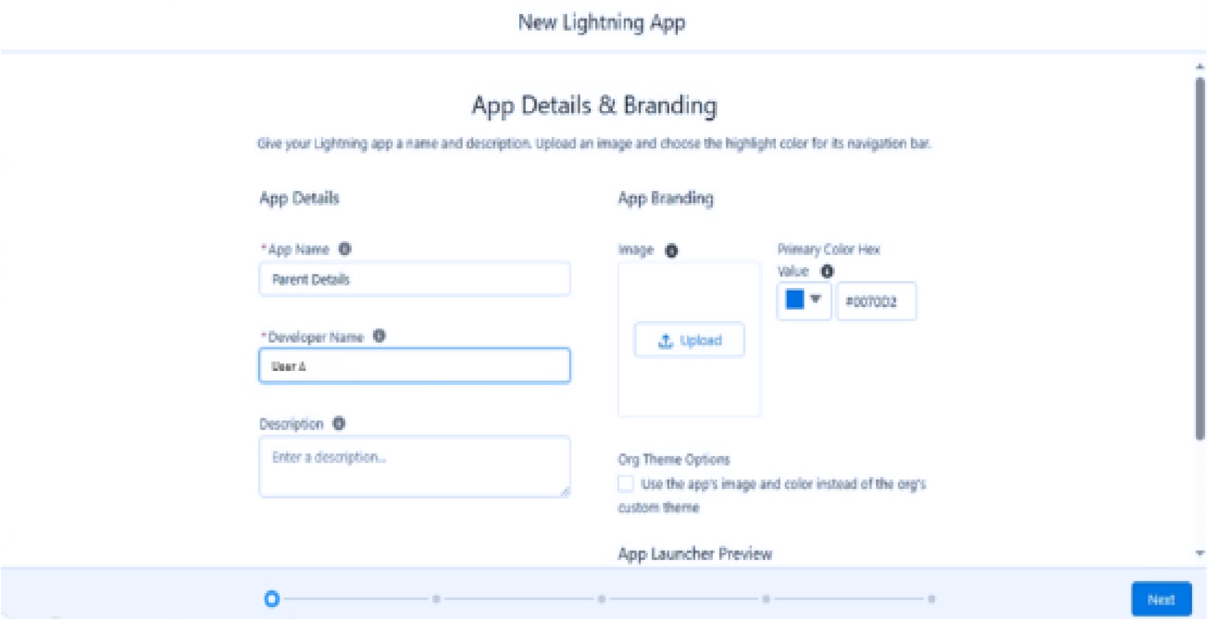
7. Save the changes.



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.

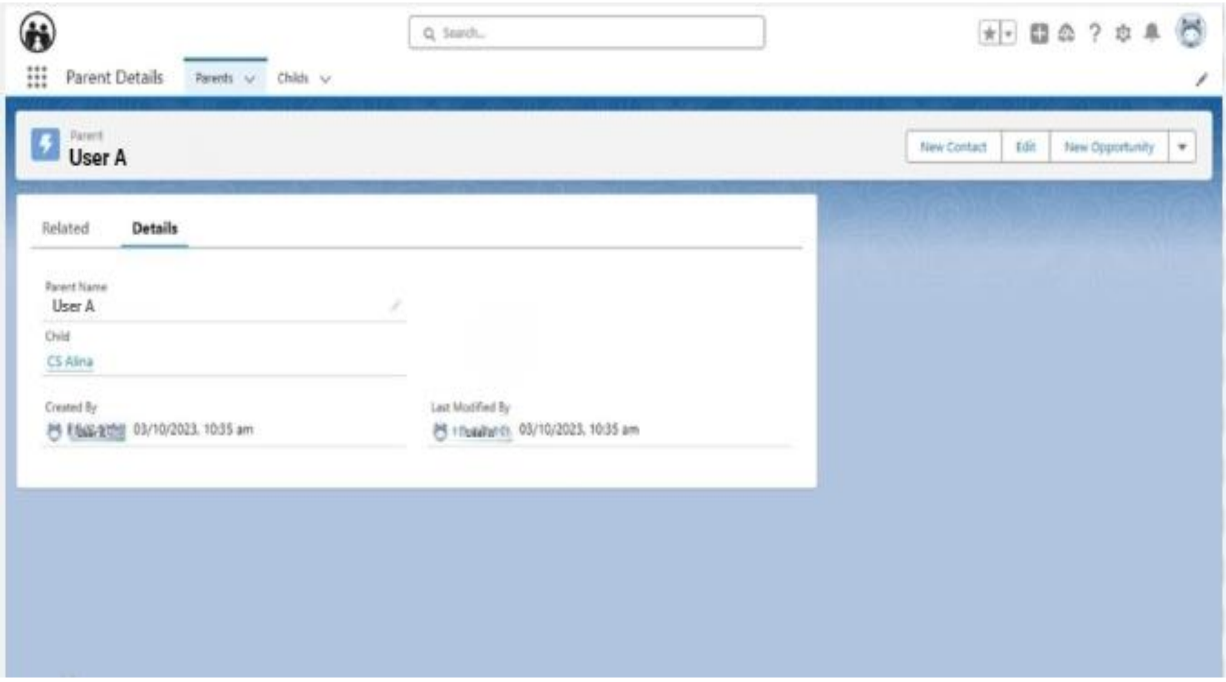




Step 5: Test the Relationship and Roll-Up Summary Field

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

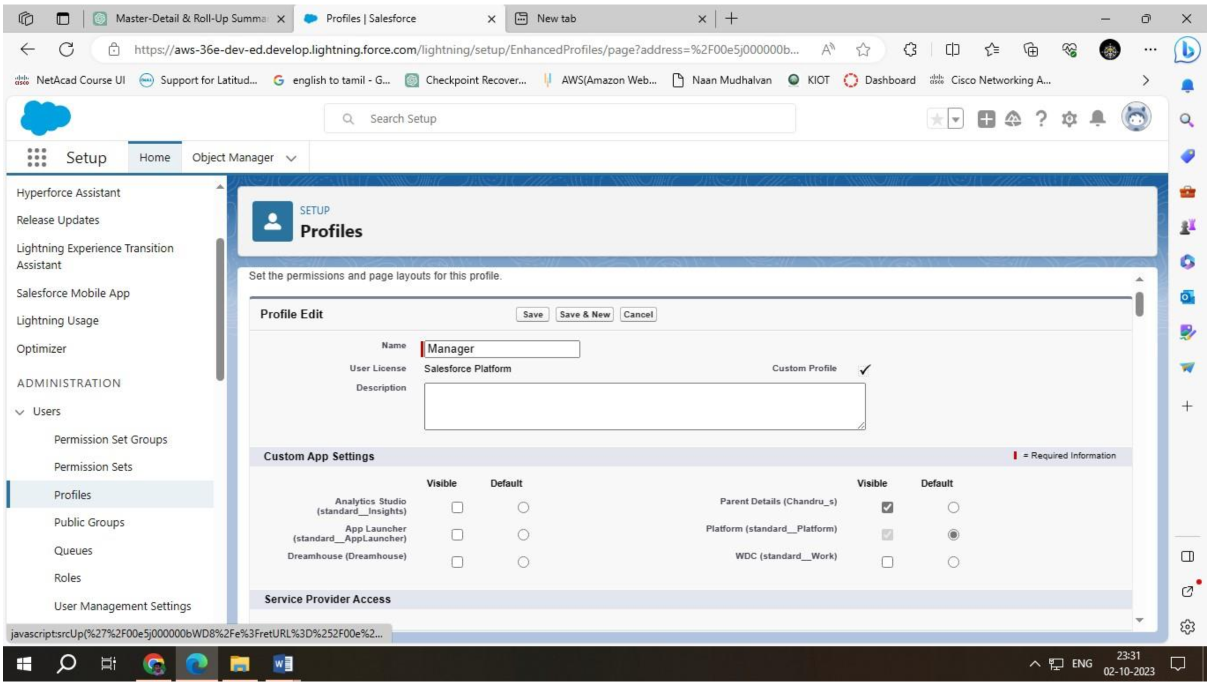
1. Go to "Setup" in Salesforce.

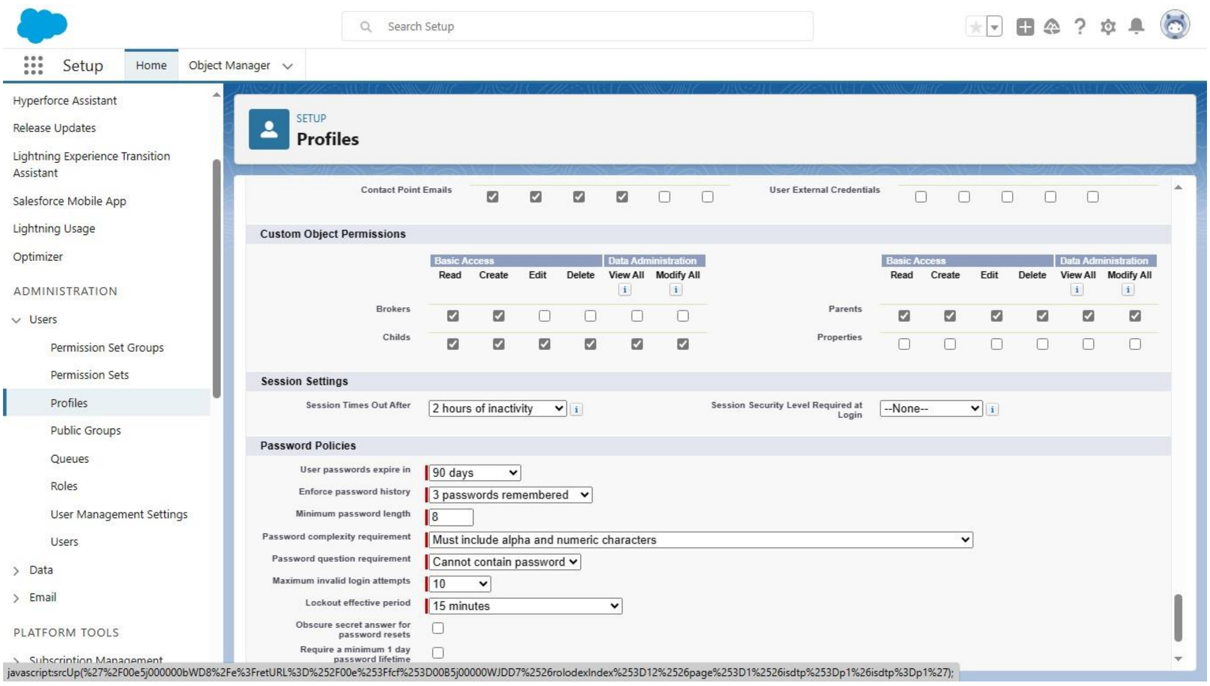
2. In the Quick Find box, type "Public Groups" and select it.

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.

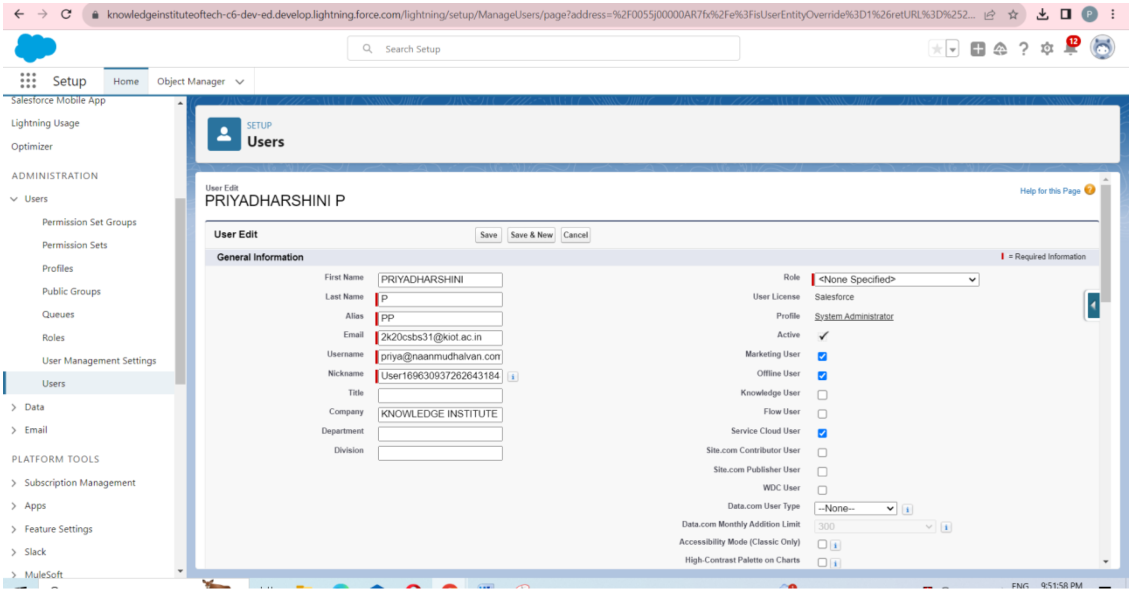
2. In the Quick Find box, type "Sharing Rules" and select "Sharing Settings."

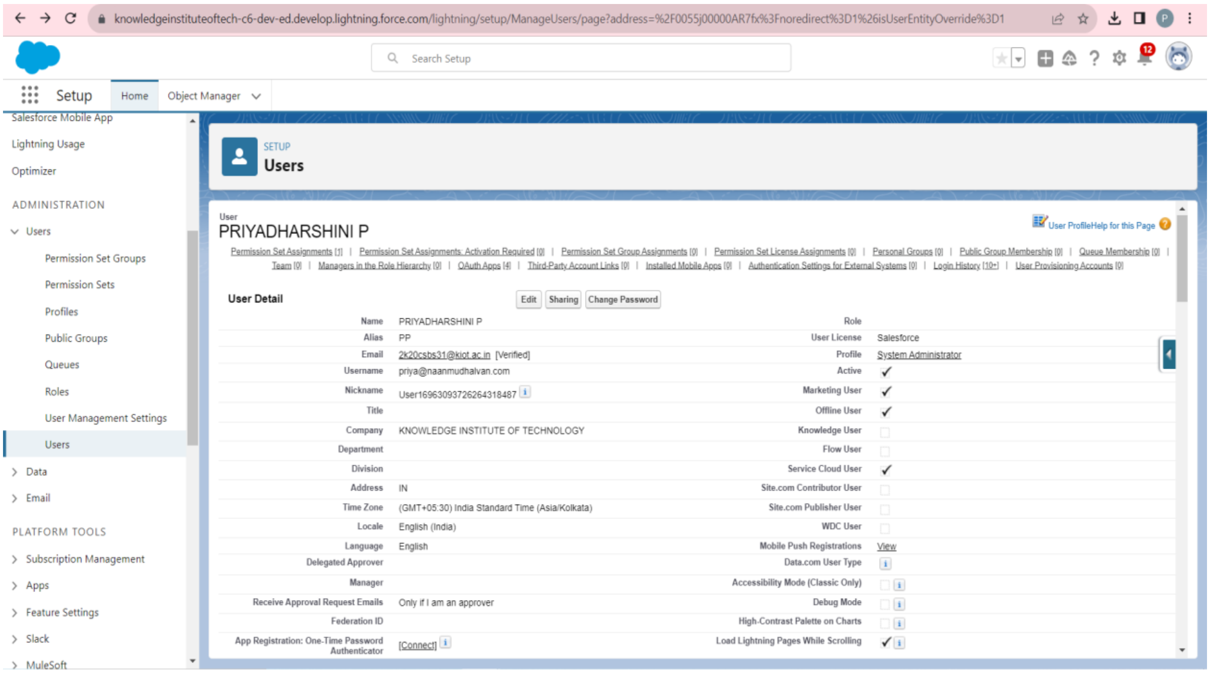
3. Under "Account Sharing Rules," click on "New Sharing Rule."

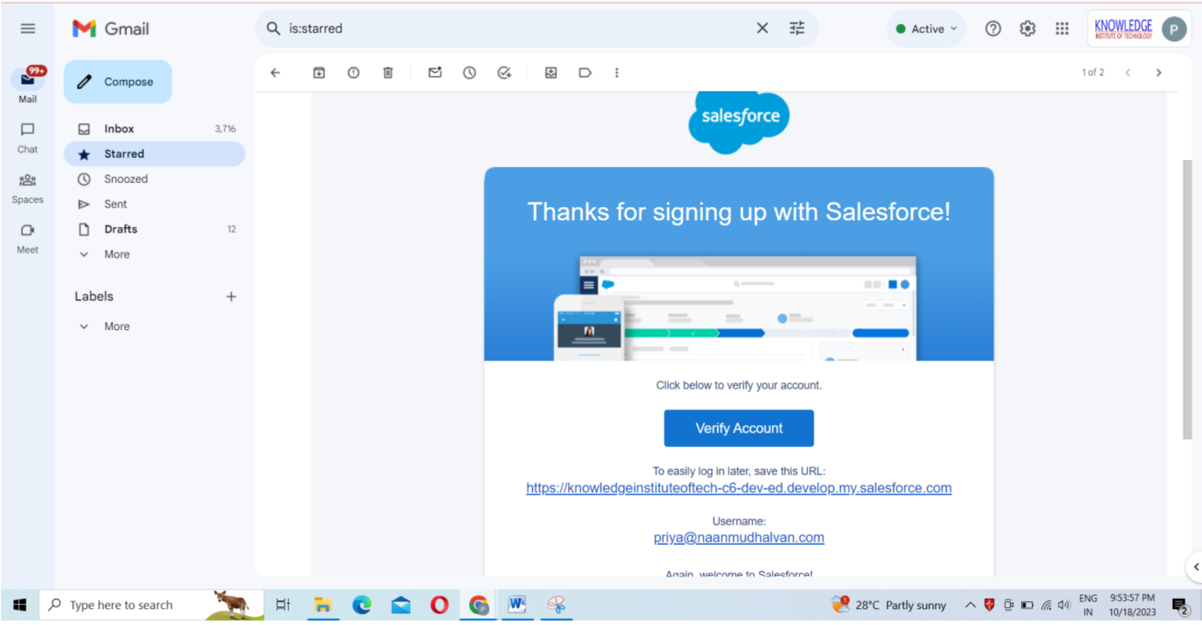
4. Create a rule that shares records owned by members of "UserB_Group" with the "UserA_Group."

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

6. Save the sharing rule.






Gmail
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Active
Compose
Inbox 3,716
Starred
Snoozed
Sent
Drafts 12
More
Labels
More
Mail
Chat
Spaces
Meet
1 of 2
salesforce
Thanks for signing up with Salesforce!
Click below to verify your account.
Verify Account
To easily log in later, save this URL:
https://knowledgeinstituteoftech-c6-dev-ed.develop.my.salesforce.com
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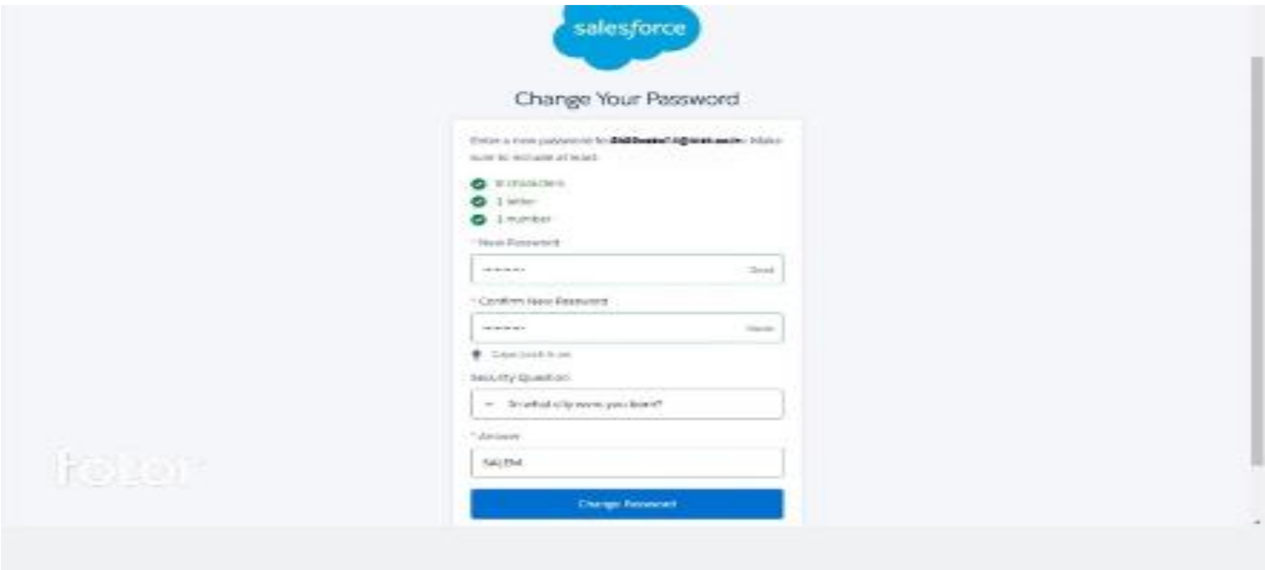
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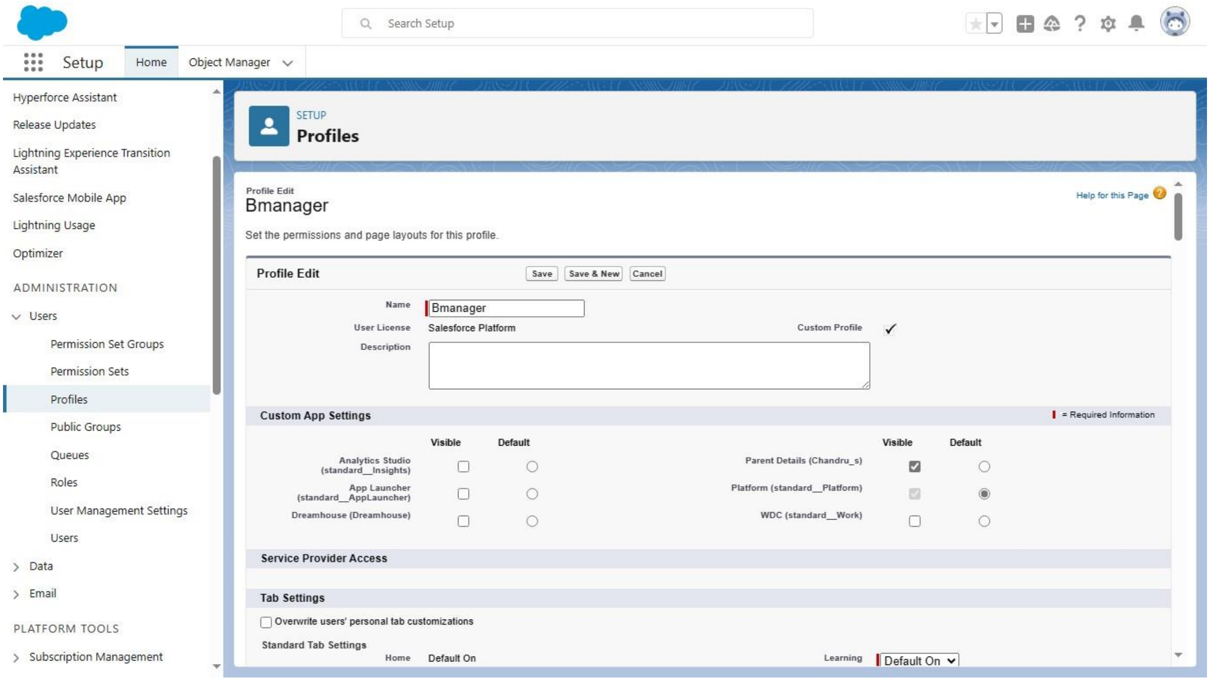
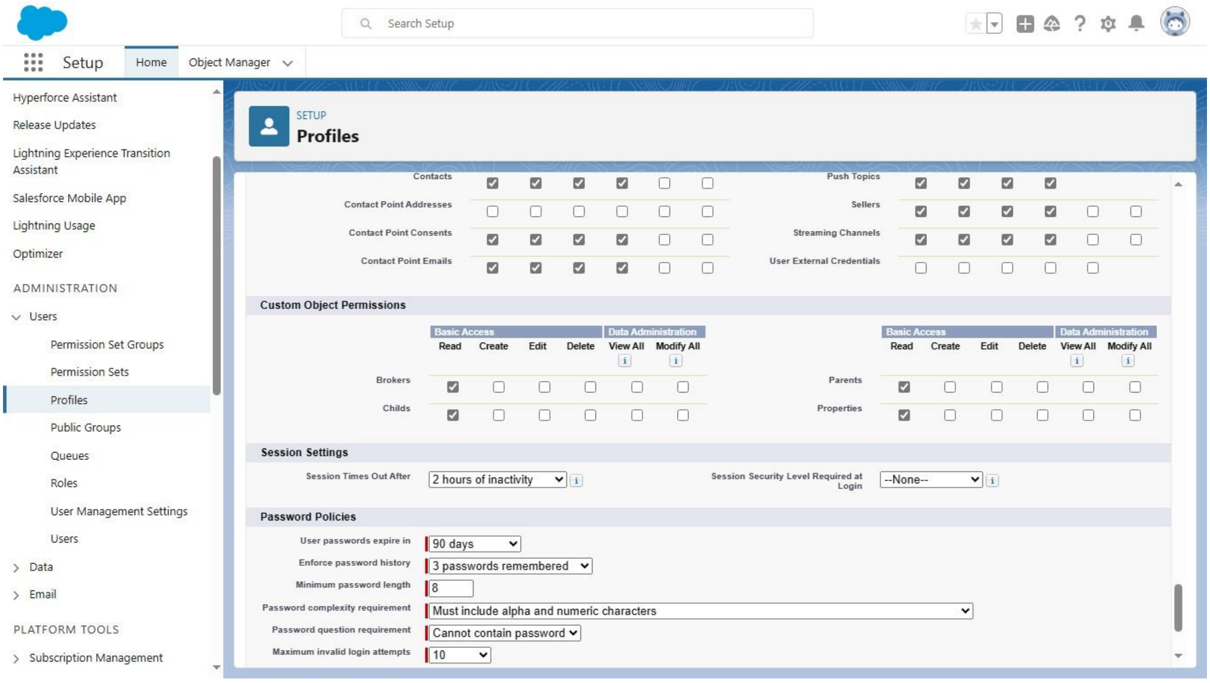




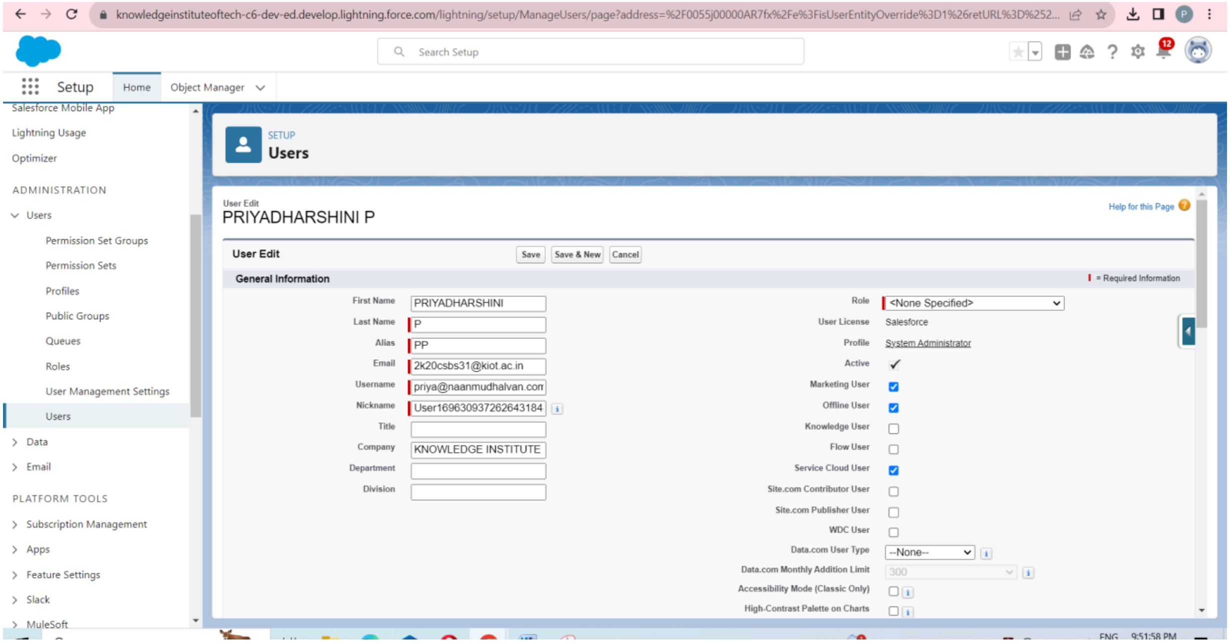
For User B:

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

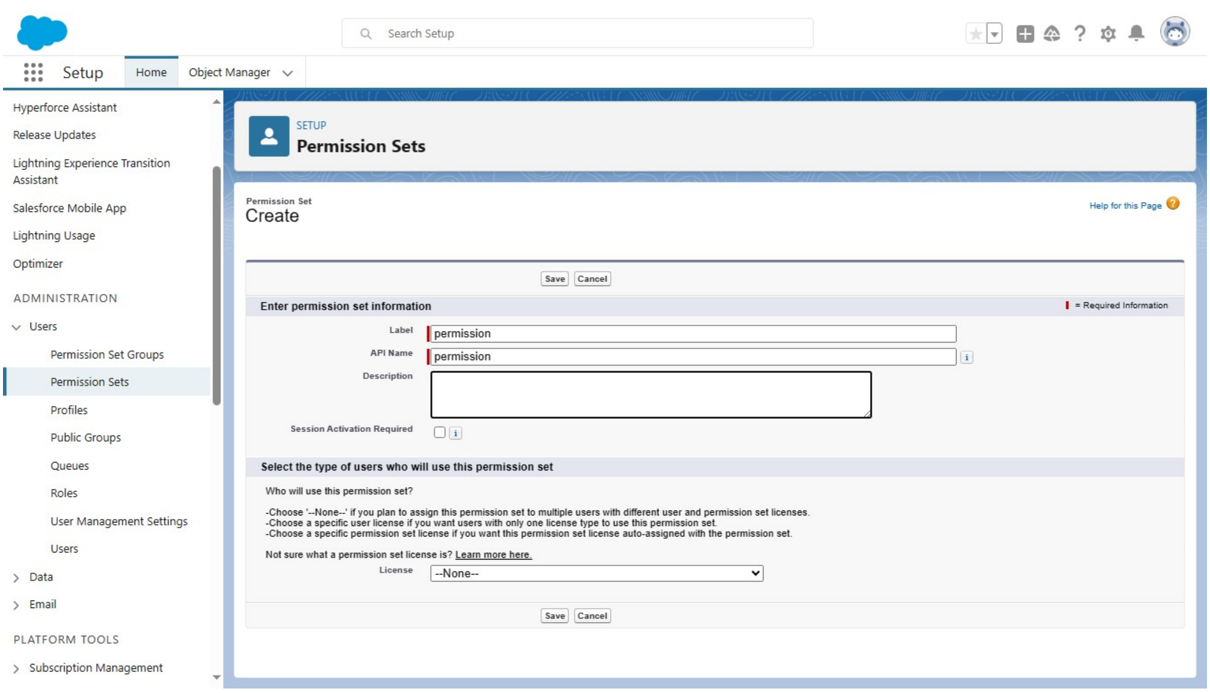
2. This rule should share records owned by members of "UserA_Group" with the "UserB_Group."

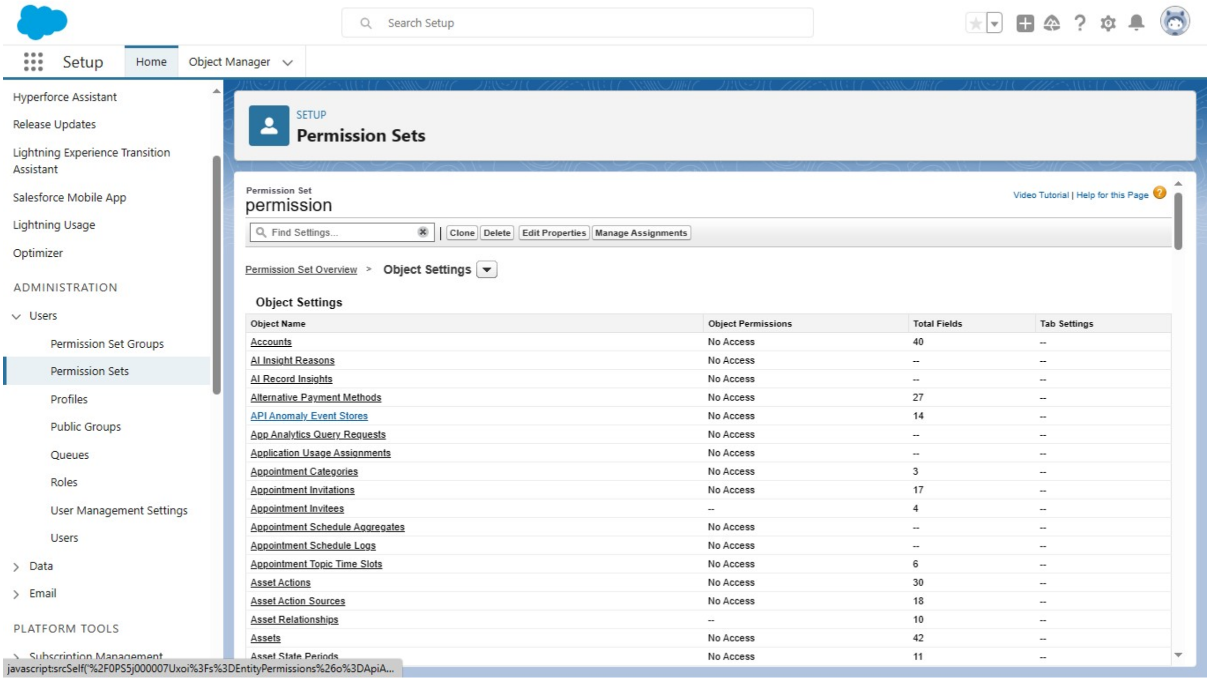
3. Define the criteria based on which records should be shared.

4. Save the sharing rule.



Step 3: Assign Records Ownership

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Video Tutorial | Help for this Page
Find Settings...
Clone
Delete
Edit Properties
Manage Assignments
Permission Set Overview > Object Settings
Object Settings
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Tab Settings
Accounts
AI Insight Reasons
AI Record Insights
Alternative Payment Methods
API Anomaly Event Stores
App Analytics Query Requests
Application Usage Assignments
Appointment Categories
Appointment Invitations
Appointment Invitees
Appointment Schedule Aggregates
Appointment Schedule Logs
Appointment Topic Time Slots
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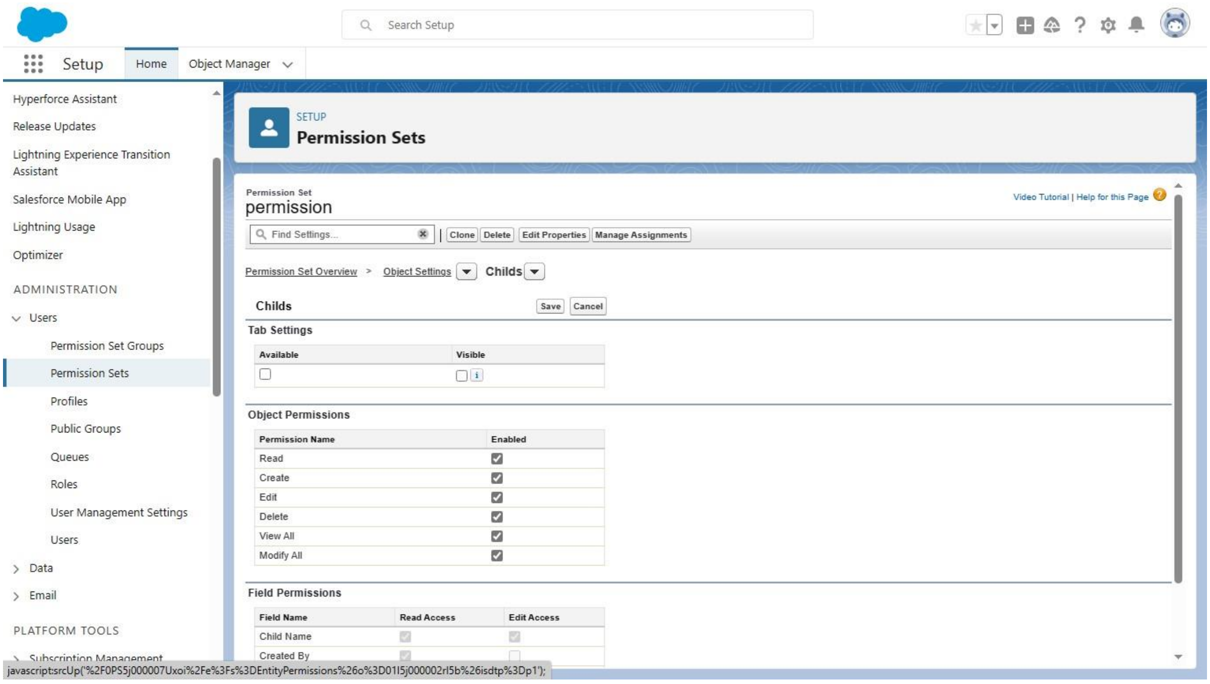
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Permission Set Overview > Object Settings Childs
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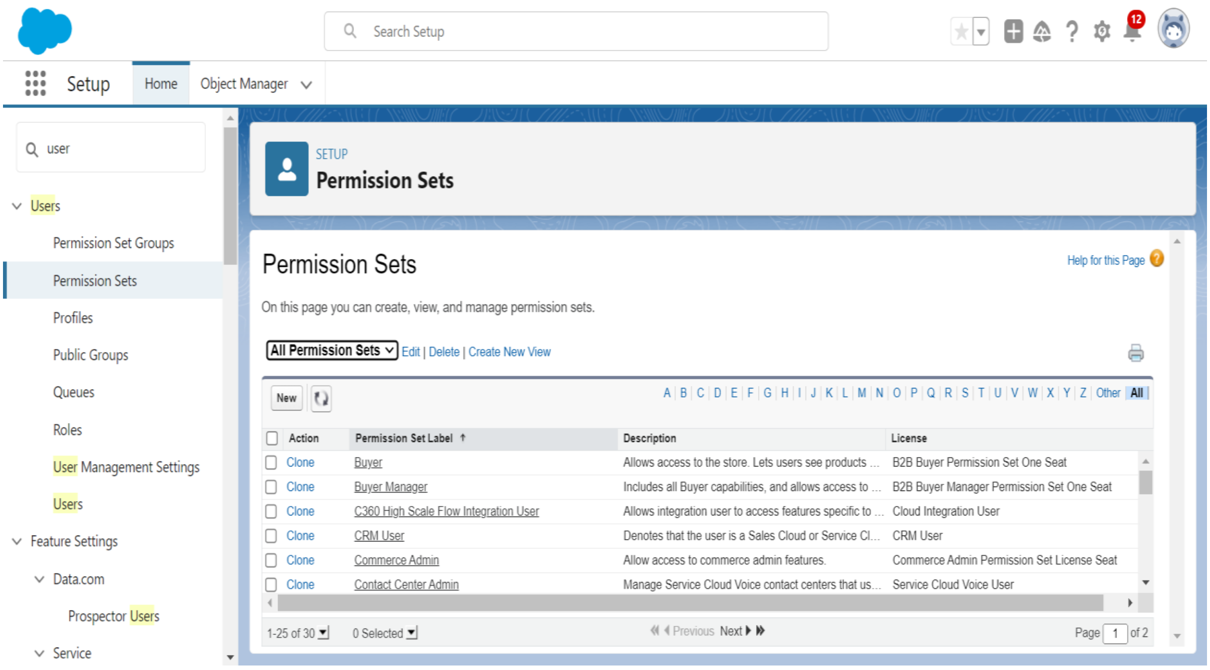
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Permission Sets
Permission Sets
Help for this Page
On this page you can create, view, and manage permission sets.
All Permission Sets
Edit | Delete | Create New View
New
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B2B Buyer Permission Set One Seat
Clone
Buyer Manager
Includes all Buyer capabilities, and allows access to ...
B2B Buyer Manager Permission Set One Seat
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Allows integration user to access features specific to ...
Cloud Integration User
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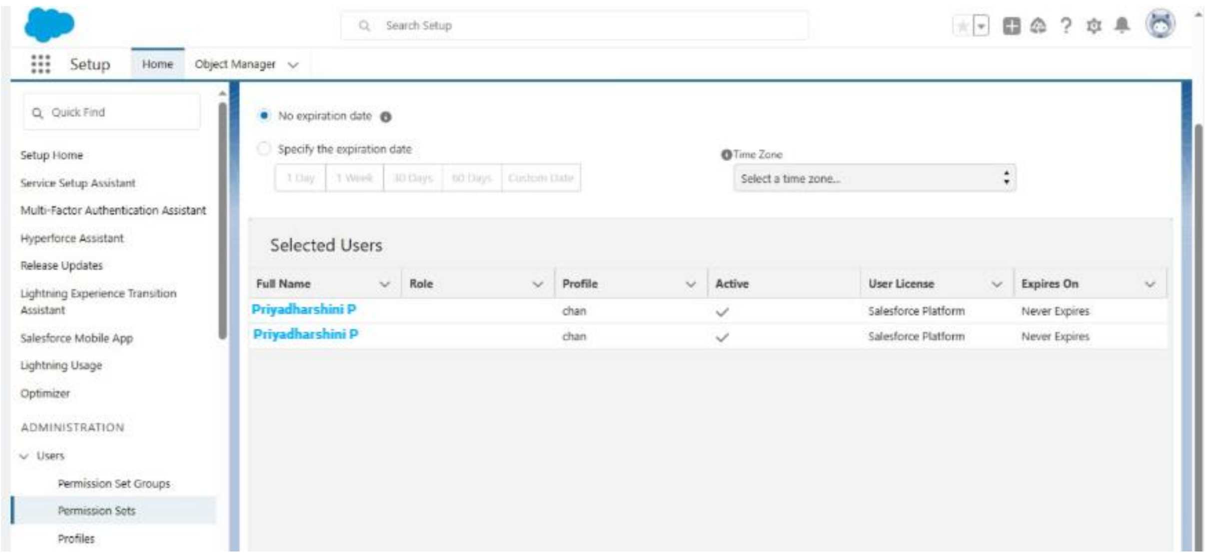
Page 1 of 2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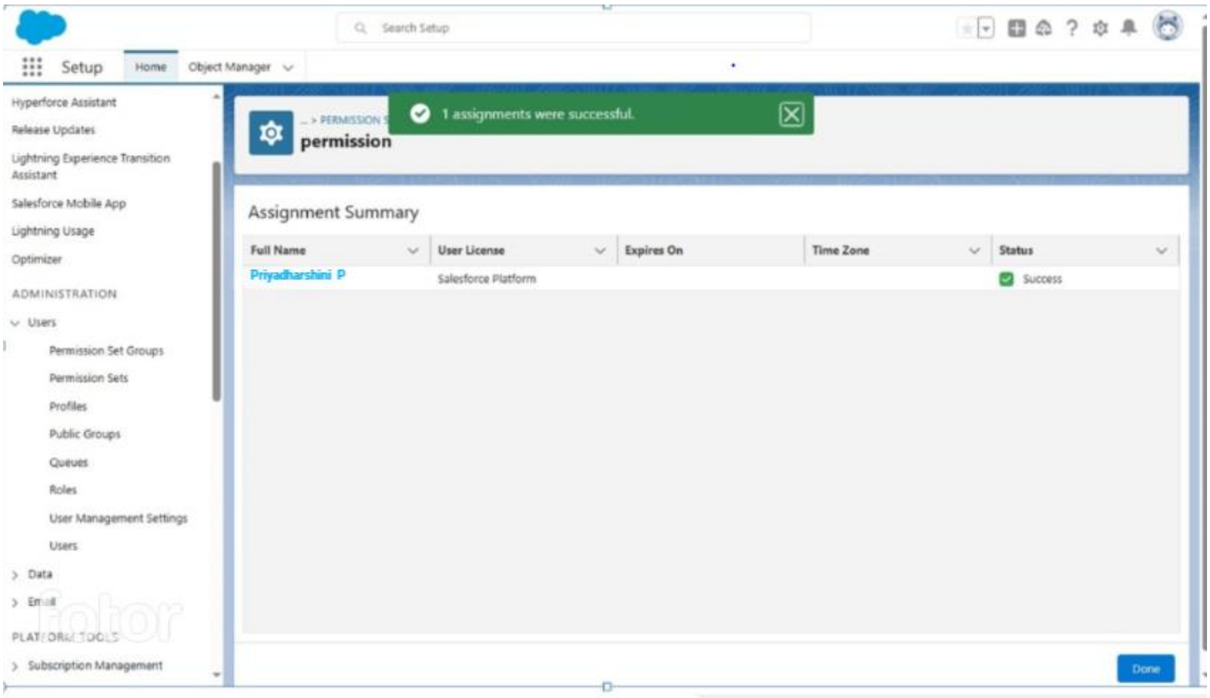
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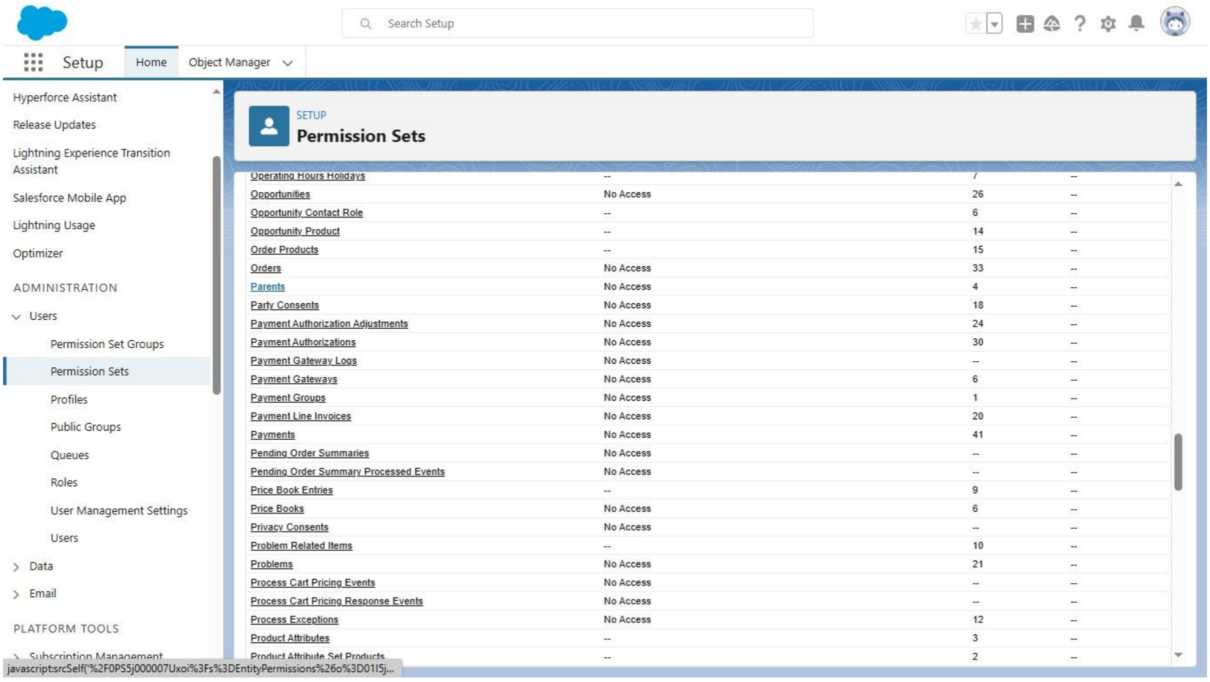
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Opportunity Product 14
Order Products 15
Orders No Access 33
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Payment Authorization Adjustments No Access 24
Payment Authorizations No Access 30
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Payment Groups No Access 1
Payment Line Invoices No Access 20
Payments No Access 41
Pending Order Summaries No Access
Pending Order Summary Processed Events No Access
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Privacy Consents No Access
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Problems No Access 21
Process Cart Pricing Events No Access
Process Cart Pricing Response Events No Access
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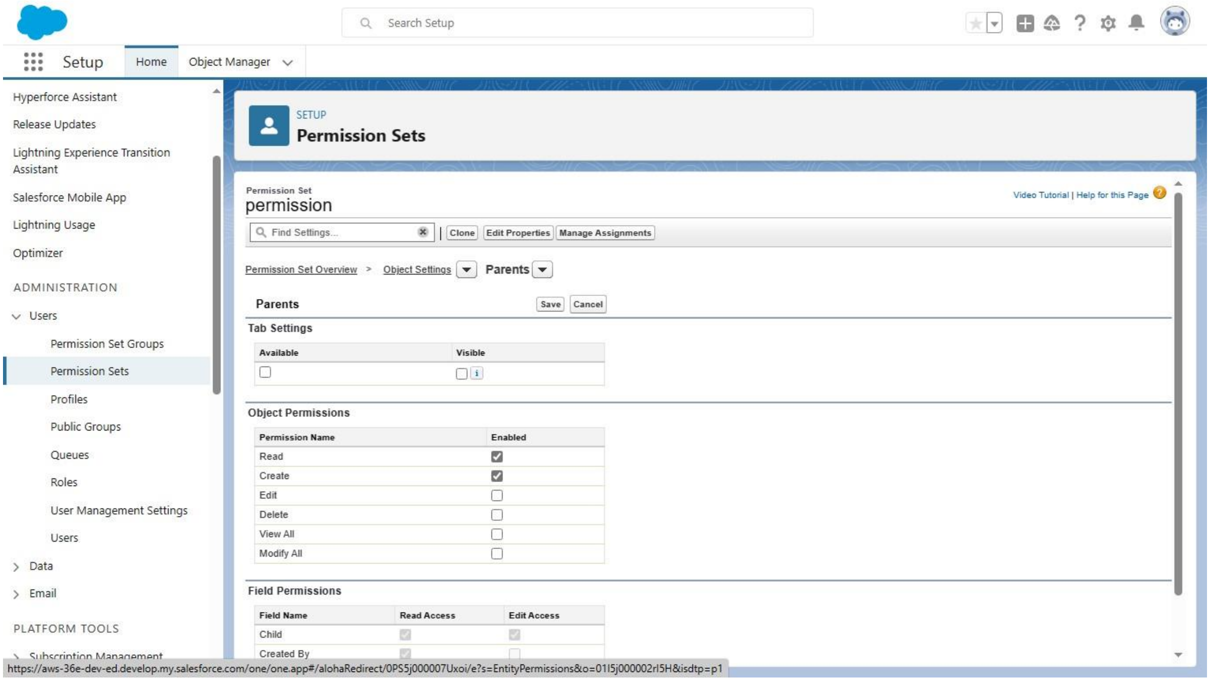
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Edit Properties
Manage Assignments
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Parents
Save
Cancel
Tab Settings
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View All
Modify All
Field Permissions
Field Name
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Edit Access
Child
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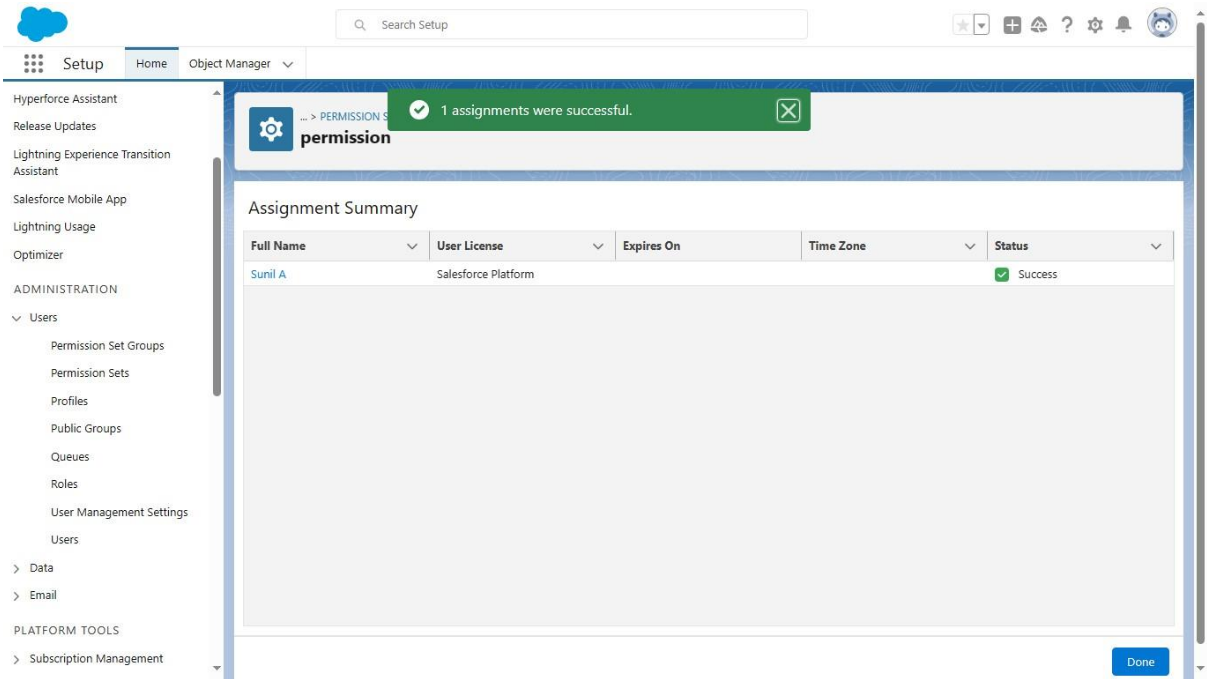
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Success
Done

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.

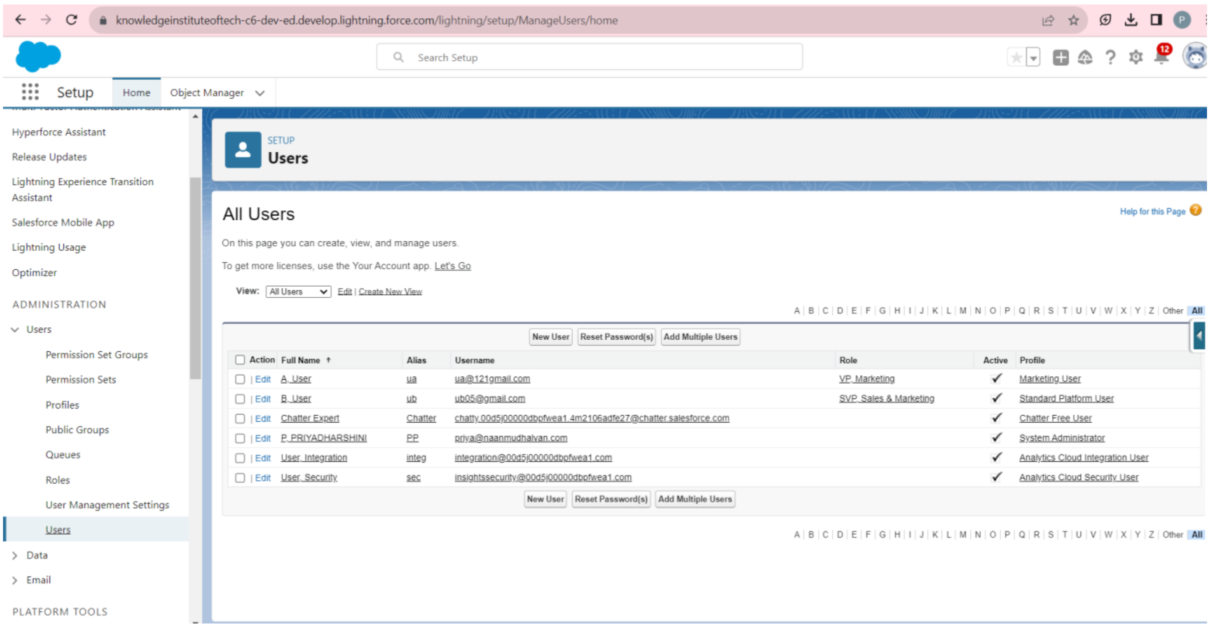
2. In the Quick Find box, type "Permission Sets" and select it.

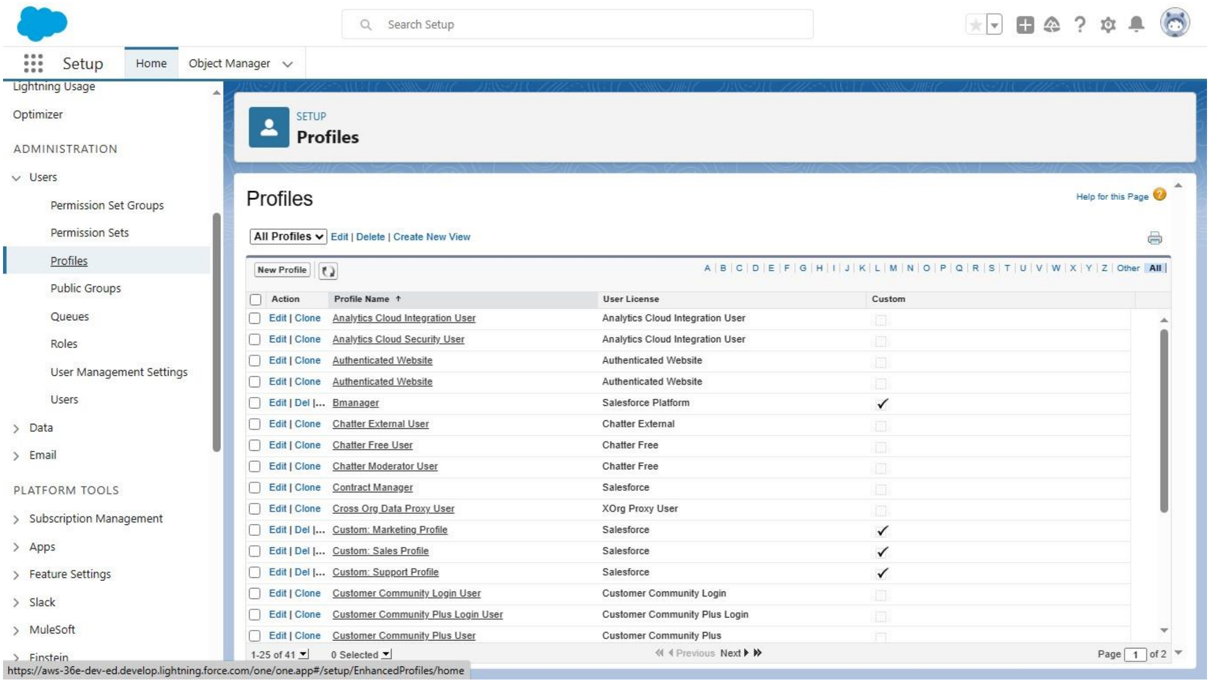
3. Click "New Permission Set" to create a new one.

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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Slack
MuleSoft
Einstein
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Profiles
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Help for this Page
All Profiles
Edit | Delete | Create New View
New Profile
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
Profile Name
User License
Custom
Edit | Clone Analytics Cloud Integration User Analytics Cloud Integration User
Edit | Clone Analytics Cloud Security User Analytics Cloud Integration User
Edit | Clone Authenticated Website Authenticated Website
Edit | Clone Authenticated Website Authenticated Website
Edit | Del |... Bmanager Salesforce Platform ✓
Edit | Clone Chatter External User Chatter External
Edit | Clone Chatter Free User Chatter Free
Edit | Clone Chatter Moderator User Chatter Free
Edit | Clone Contract Manager Salesforce
Edit | Clone Cross Org Data Proxy User XOrg Proxy User
Edit | Del |... Custom: Marketing Profile Salesforce ✓
Edit | Del |... Custom: Sales Profile Salesforce ✓
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1-25 of 41
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Previous Next
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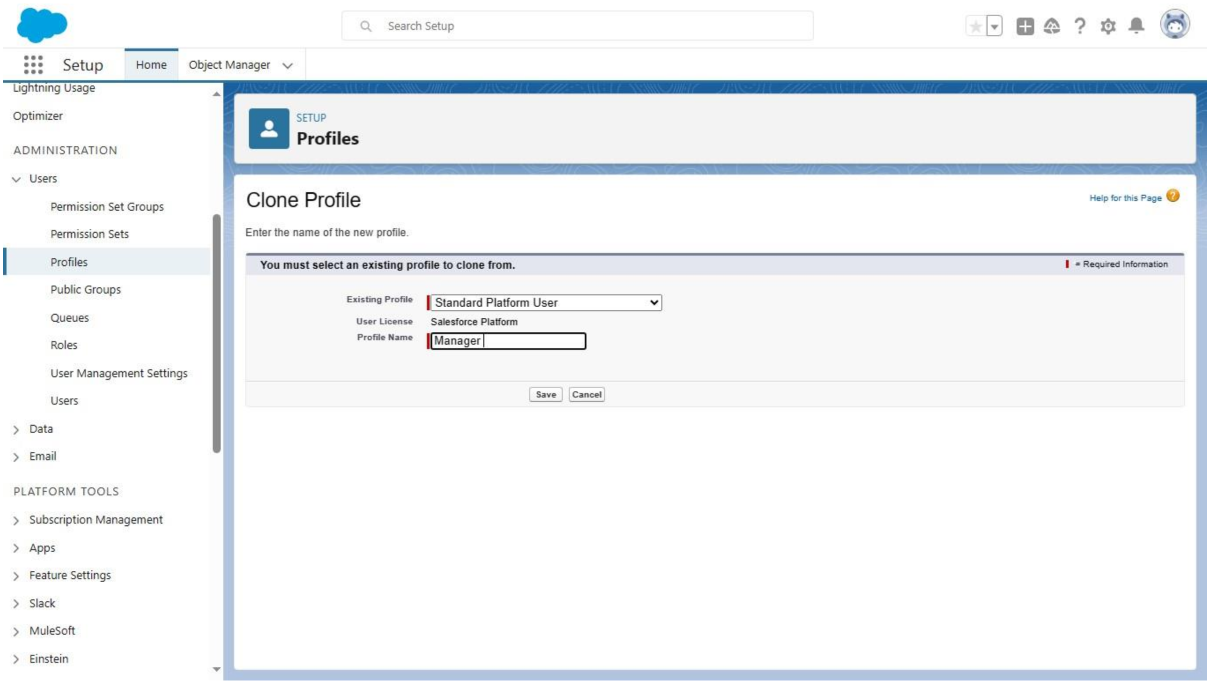
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Subscription Management
Apps
Feature Settings
Slack
MuleSoft
Einstein
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Profiles
Clone Profile
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You must select an existing profile to clone from.
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Existing Profile Standard Platform User
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Save
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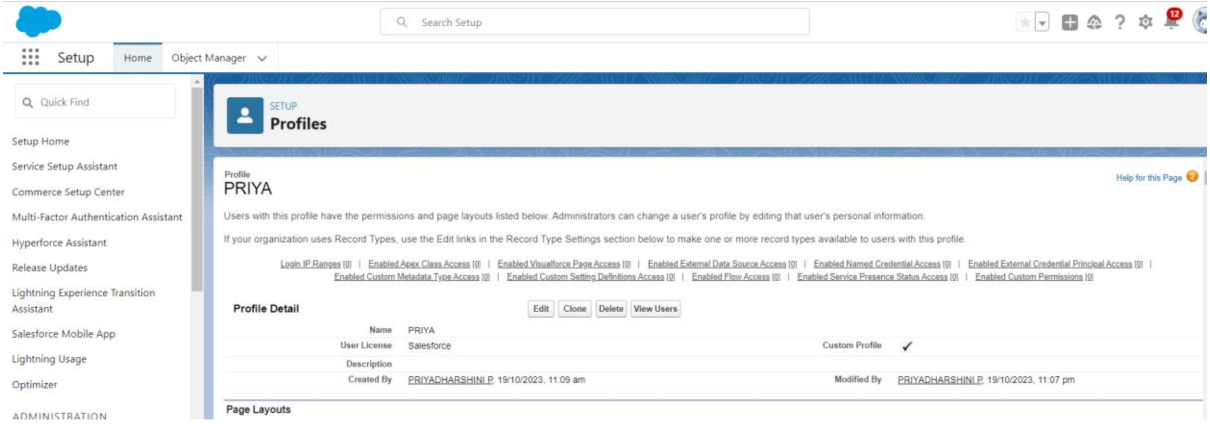

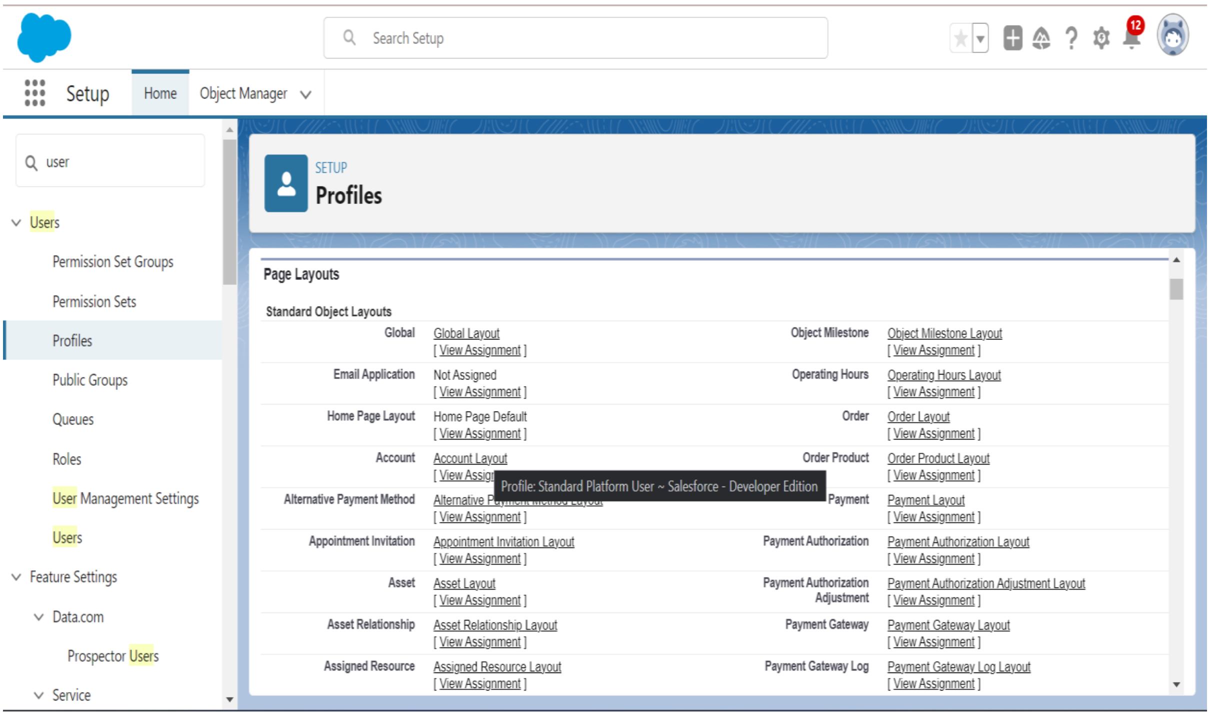

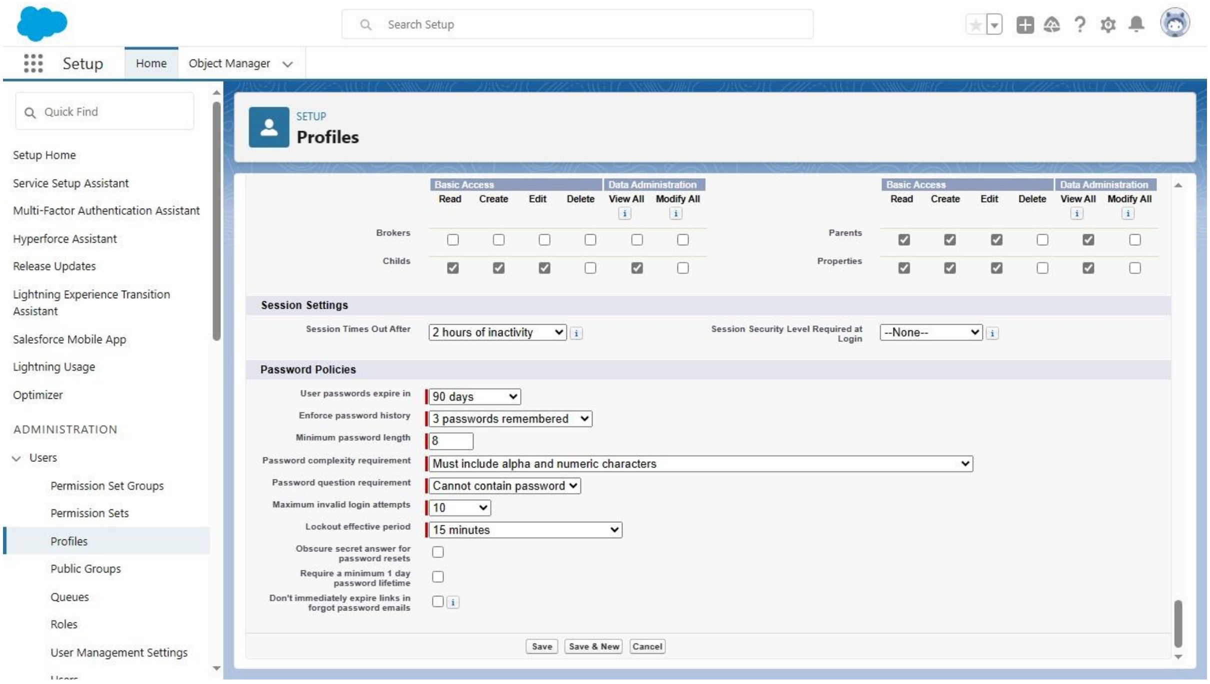

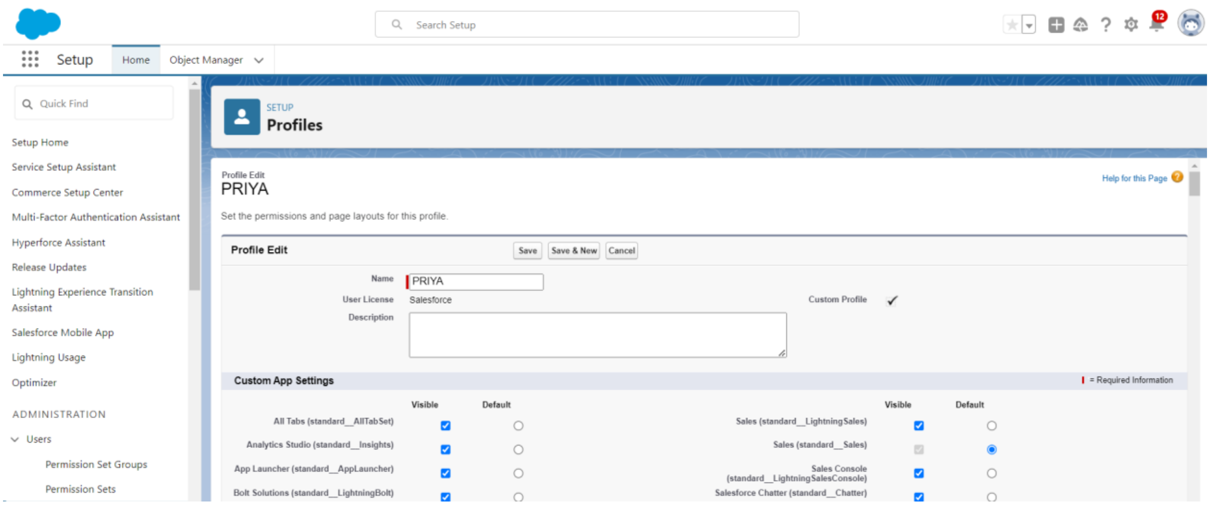

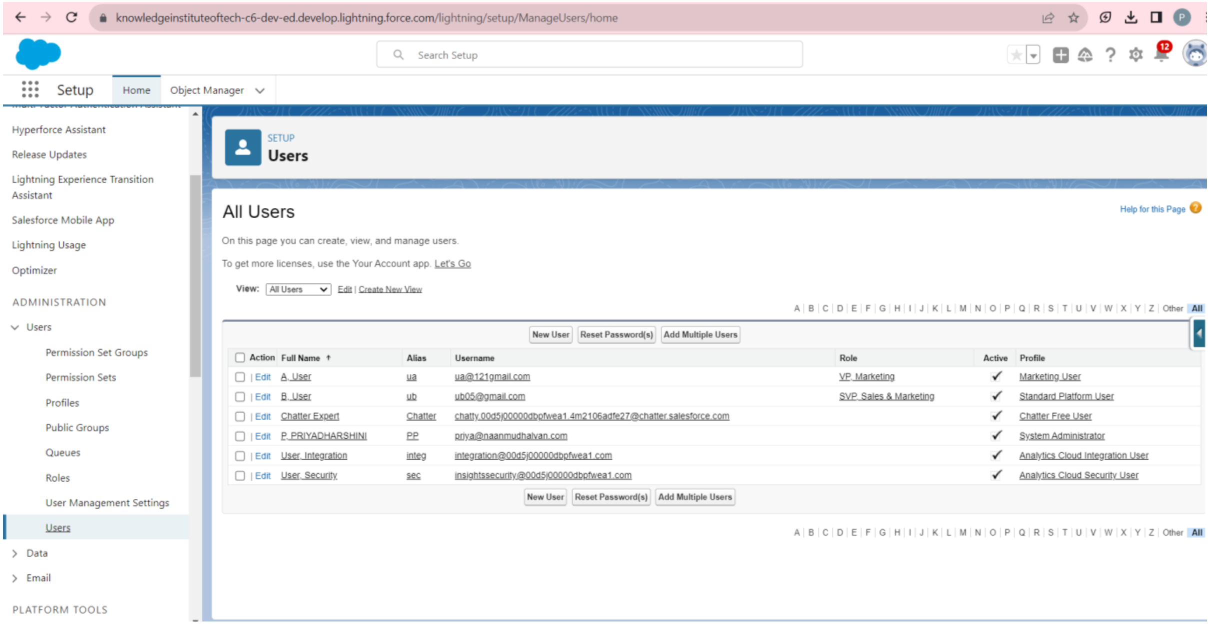
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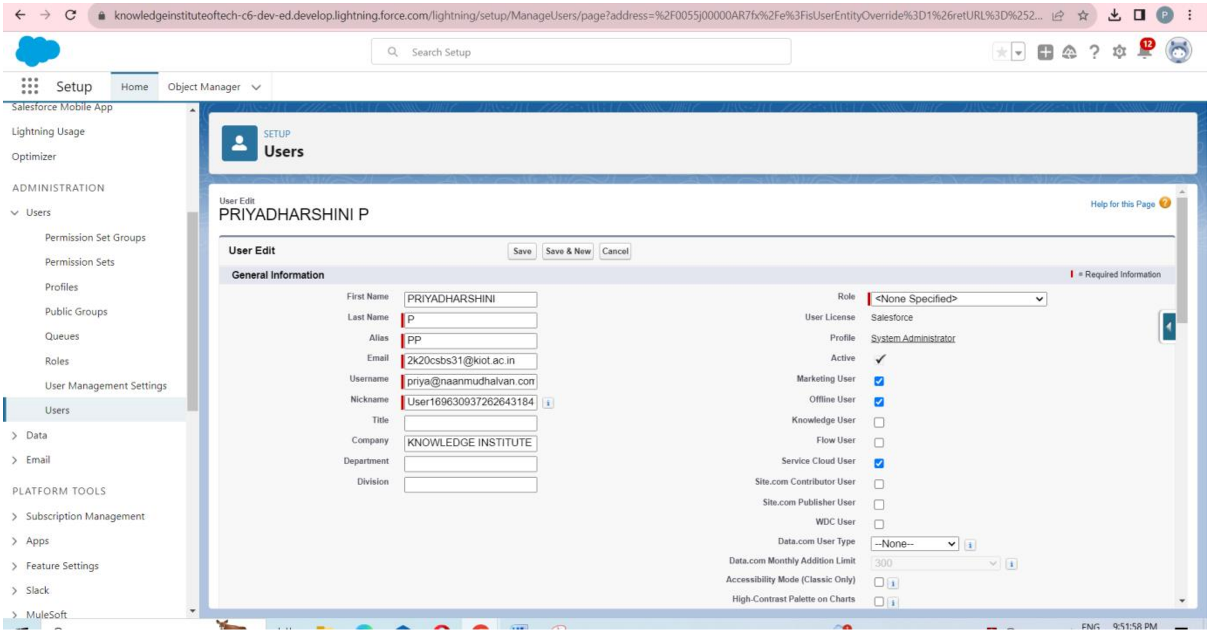
All Users
Help for this Page
On this page you can create, view, and manage users.
To get more licenses, use the Your Account app. Let's Go
View: All Users Edit | Create New View
New User
Reset Password(s)
Add Multiple Users
Action | Full Name | Alias | Username | Role | Active | Profile
Edit | A, User | ua | ua@121gmail.com | VP, Marketing | ✓ | Marketing User
Edit | B, User | ub | ub05@gmail.com | SVP, Sales & Marketing | ✓ | Standard Platform User
Edit | Chatter Expert | Chatter | chatty.00d5j00000dbpfwea1.4m2106adfe27@chatter.salesforce.com | | ✓ | Chatter Free User
Edit | P, PRIYADHARSHINI | PP | priya@naanmudhalvan.com | | ✓ | System Administrator
Edit | User, Integration | integ | integration@00d5j00000dbpfwea1.com | | ✓ | Analytics Cloud Integration User
Edit | User, Security | sec | insightssecurity@00d5j00000dbpfwea1.com | | ✓ | Analytics Cloud Security User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User Edit
Save
Save & New
Cancel
General Information
= Required Information
First Name PRIYADHARSHINI
Last Name P
Alias PP
Email 2k20csbs31@kiot.ac.in
Username priya@naanmudhalvan.com
Nickname User16963093726264318
Title
Company KNOWLEDGE INSTITUTE
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
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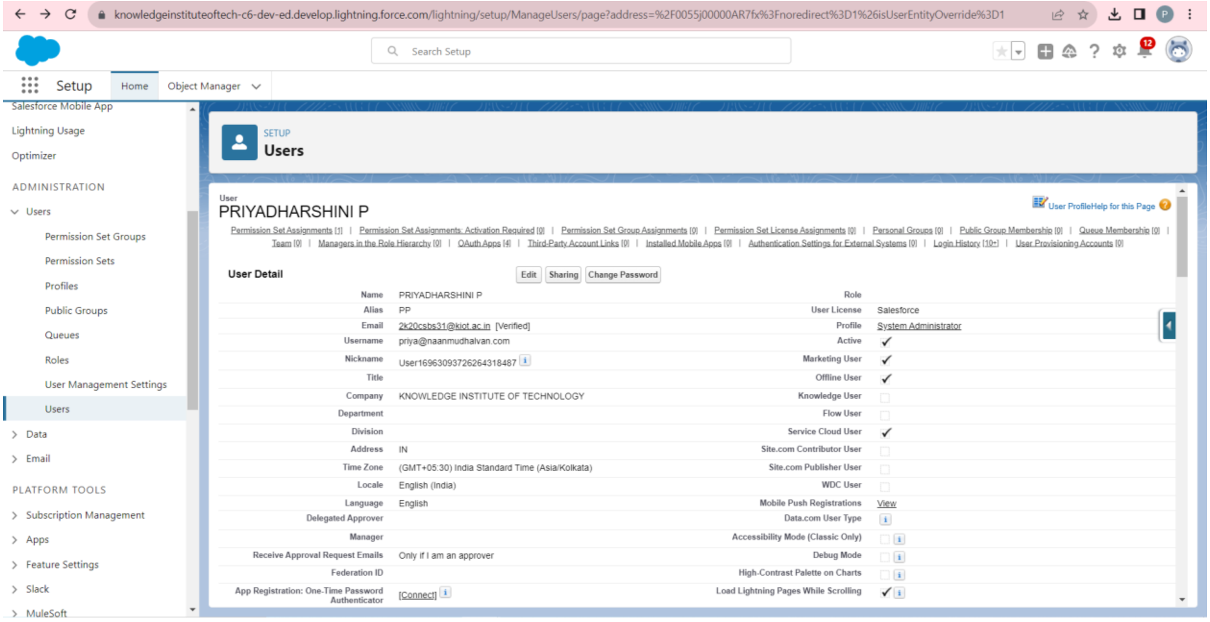
Data.com Monthly Addition Limit 300
Accessibility Mode (Classic Only)
High-Contrast Palette on Charts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Feature Settings
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MuleSoft
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PRIYADHARSHINI P
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User Detail
Edit
Sharing
Change Password
Name PRIYADHARSHINI P
Alias PP
Email 2k20csbs31@kiot.ac.in [Verified]
Username priya@naanmudhalvan.com
Nickname User16963093726264318487
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
Delegated Approver
Manager
Receive Approval Request Emails Only if I am an approver
Federation ID
App Registration: One-Time Password Authenticator [Connect]
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Profile System Administrator
Active
Marketing User
Offline User
Knowledge User
Flow User
Service Cloud User
Site.com Contributor User
Site.com Publisher User
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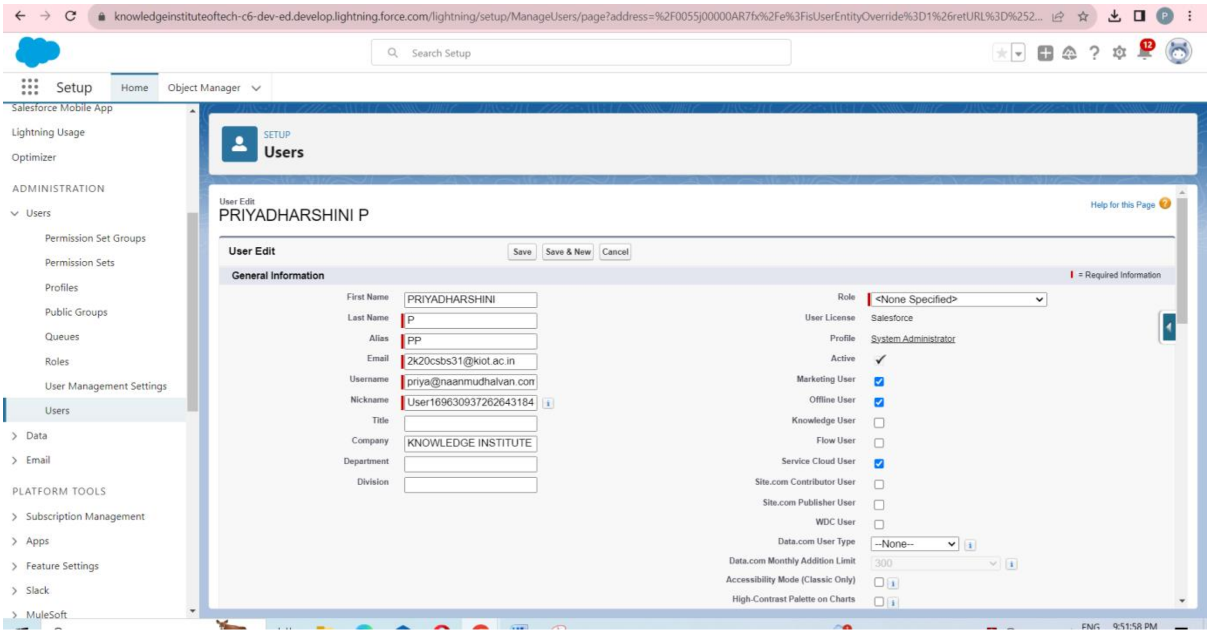
Accessibility Mode (Classic Only)
Debug Mode
High-Contrast Palette on Charts
Load Lightning Pages While Scrolling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Help for this Page
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= Required Information
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Last Name P
Alias PP
Email 2k20csbs31@kiot.ac.in
Username priya@naanmudhalvan.com
Nickname User16963093726264318
Title
Company KNOWLEDGE INSTITUTE
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
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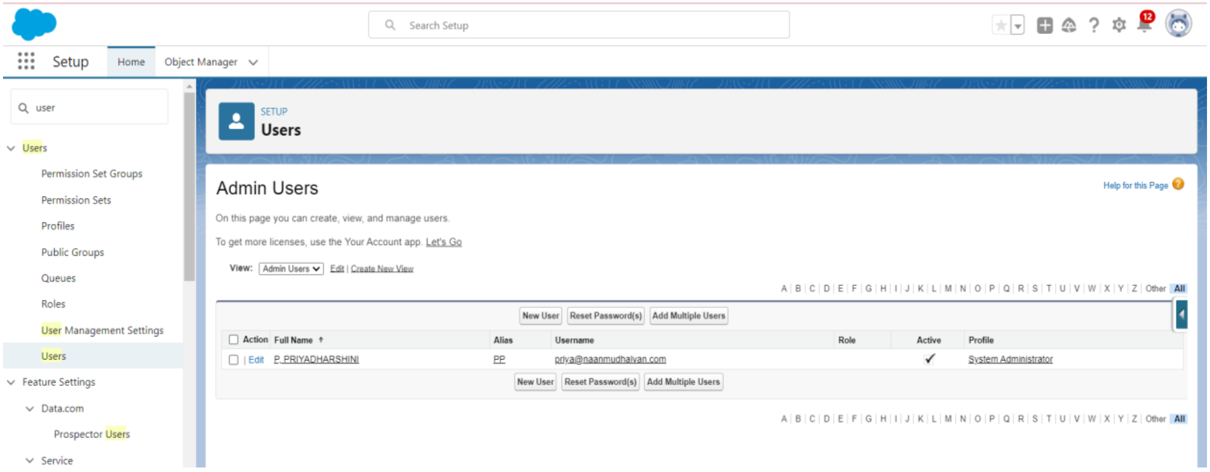
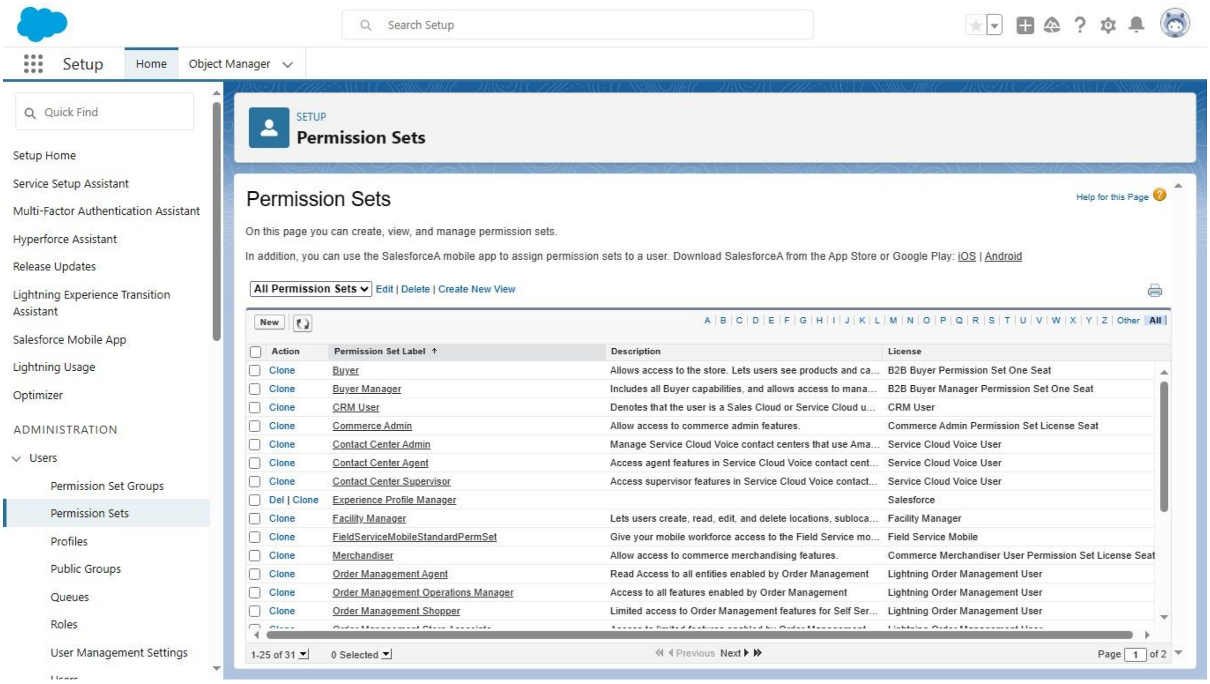


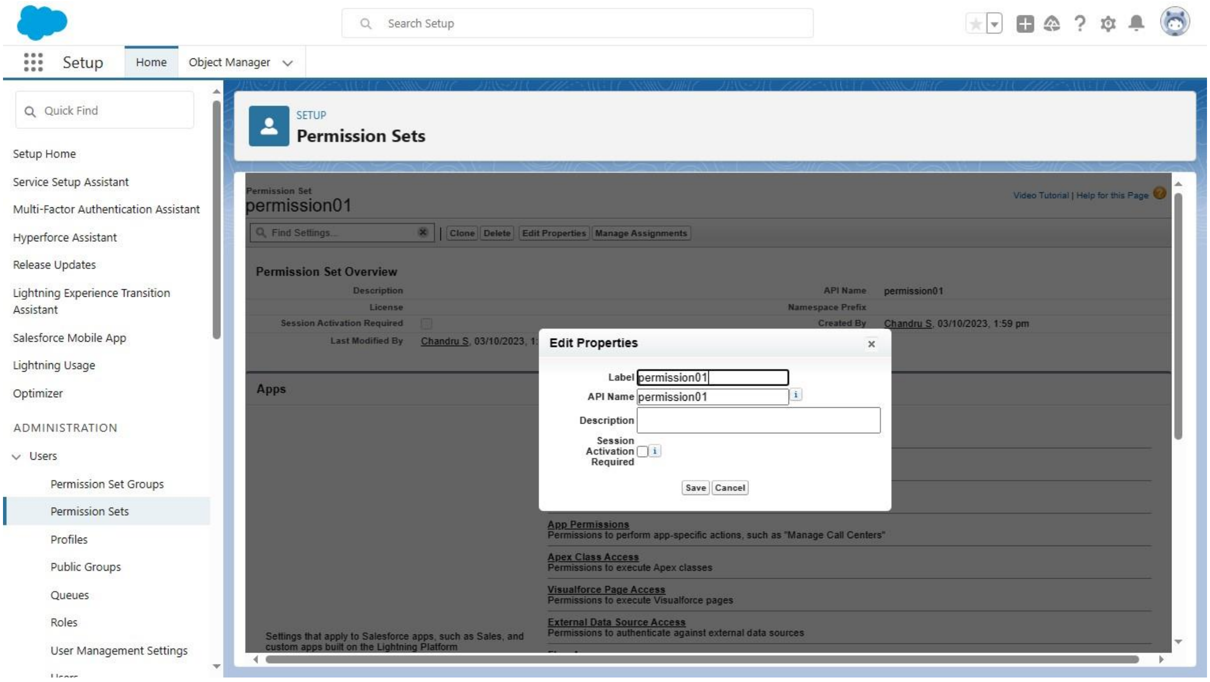
Step 2: Assign the Permission Set to the User Needing Delete Access

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.

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Multi-Factor Authentication Assistant
Hyperforce Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
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Video Tutorial | Help for this Page
Find Settings...
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Edit Properties
Manage Assignments
Permission Set Overview
Description
License
Session Activation Required
Last Modified By
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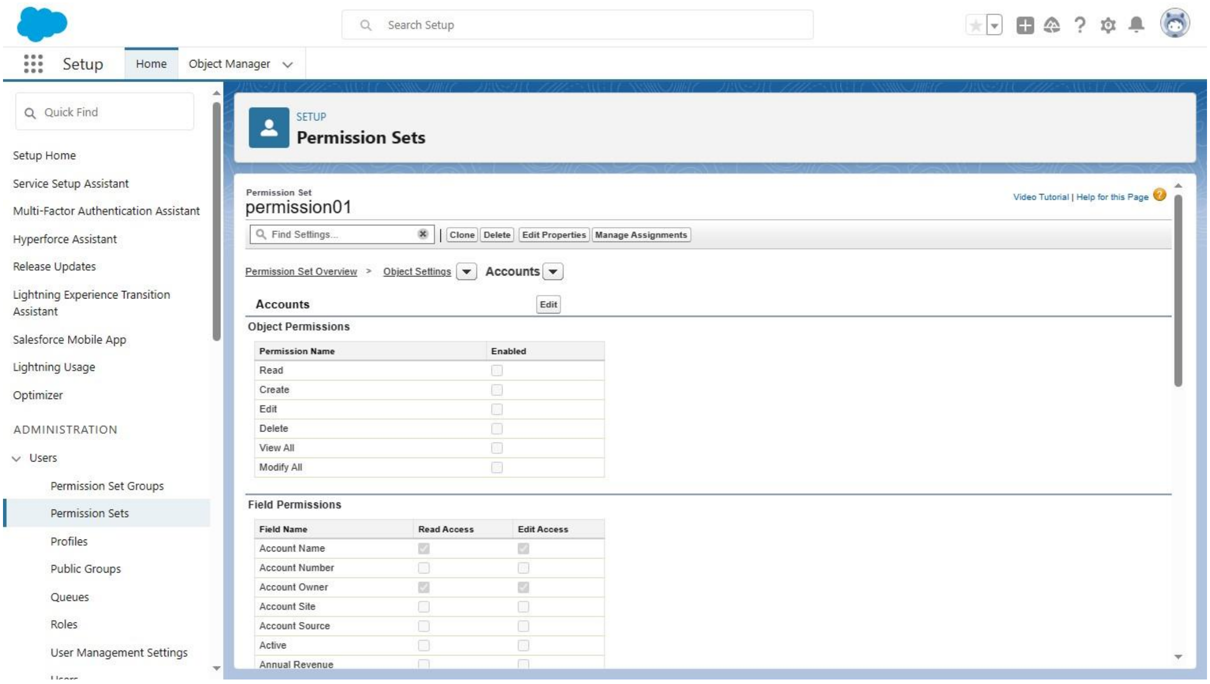
API Name
permission01
Namespace Prefix
Created By
Chandru S, 03/10/2023, 1:59 pm
Apps
Edit Properties
Label
permission01
API Name
permission01
Description
Session Activation Required
Save
Cancel
App Permissions
Permissions to perform app-specific actions, such as "Manage Call Centers"
Apex Class Access
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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Video Tutorial | Help for this Page
Find Settings...
Clone
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Edit Properties
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Permission Set Overview > Object Settings
Accounts
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Edit
Object Permissions
Permission Name
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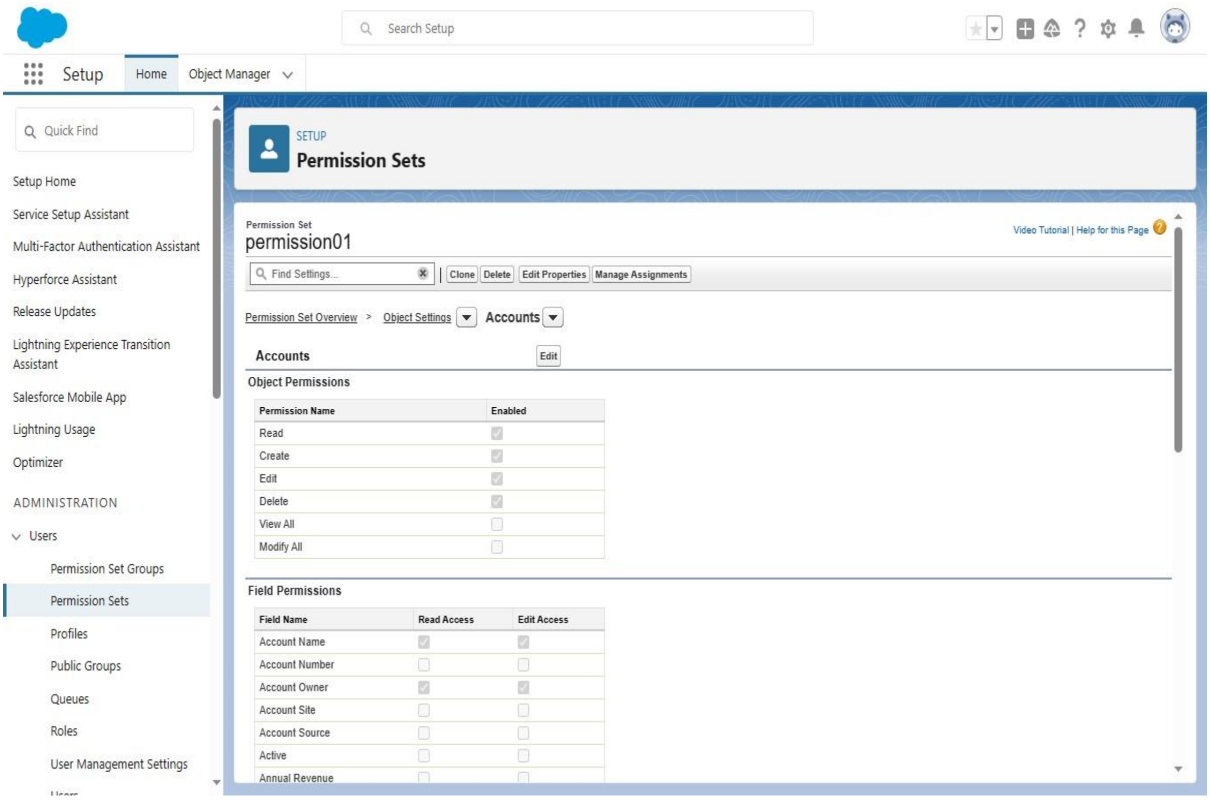
Account Site
Account Source
Active
Annual Revenue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Video Tutorial | Help for this Page
Find Settings...
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Delete
Edit Properties
Manage Assignments
Permission Set Overview > Object Settings
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Permission Name
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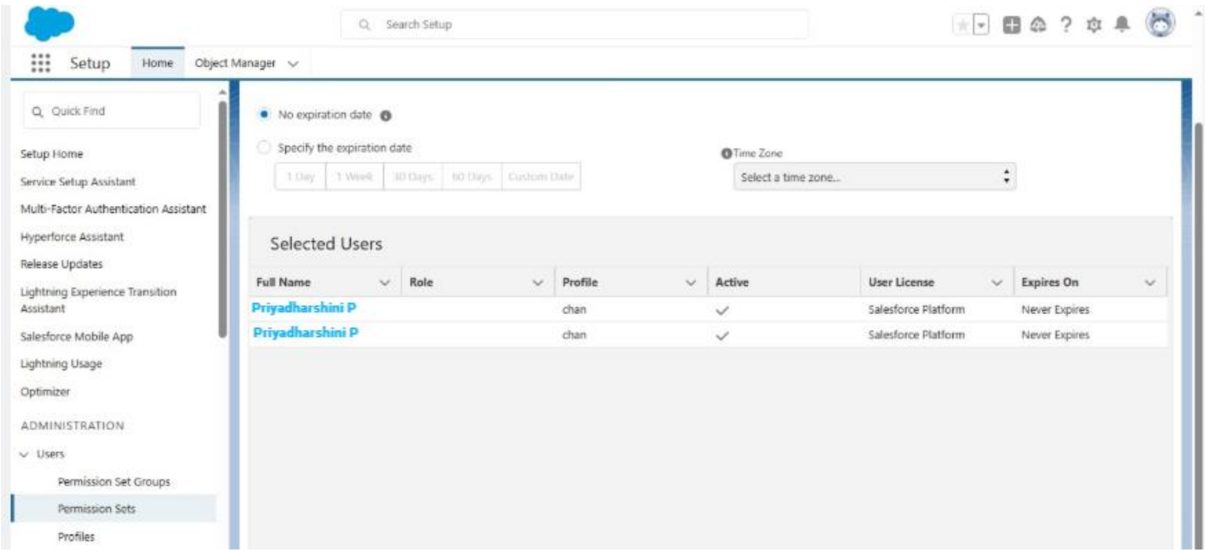
Account Source
Active
Annual Revenue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Specify the expiration date
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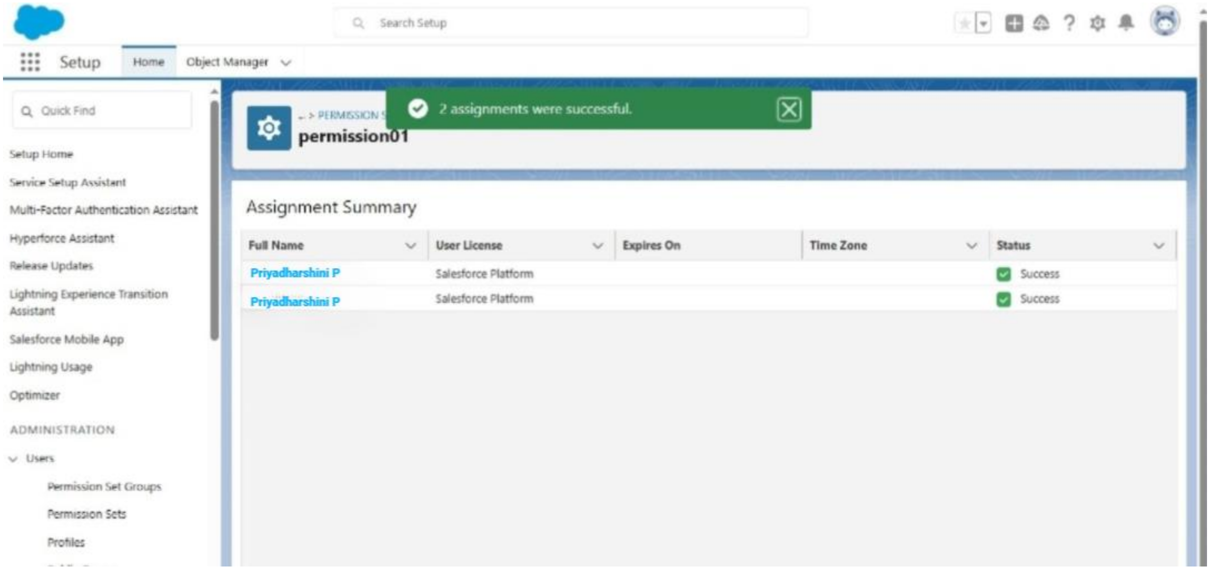
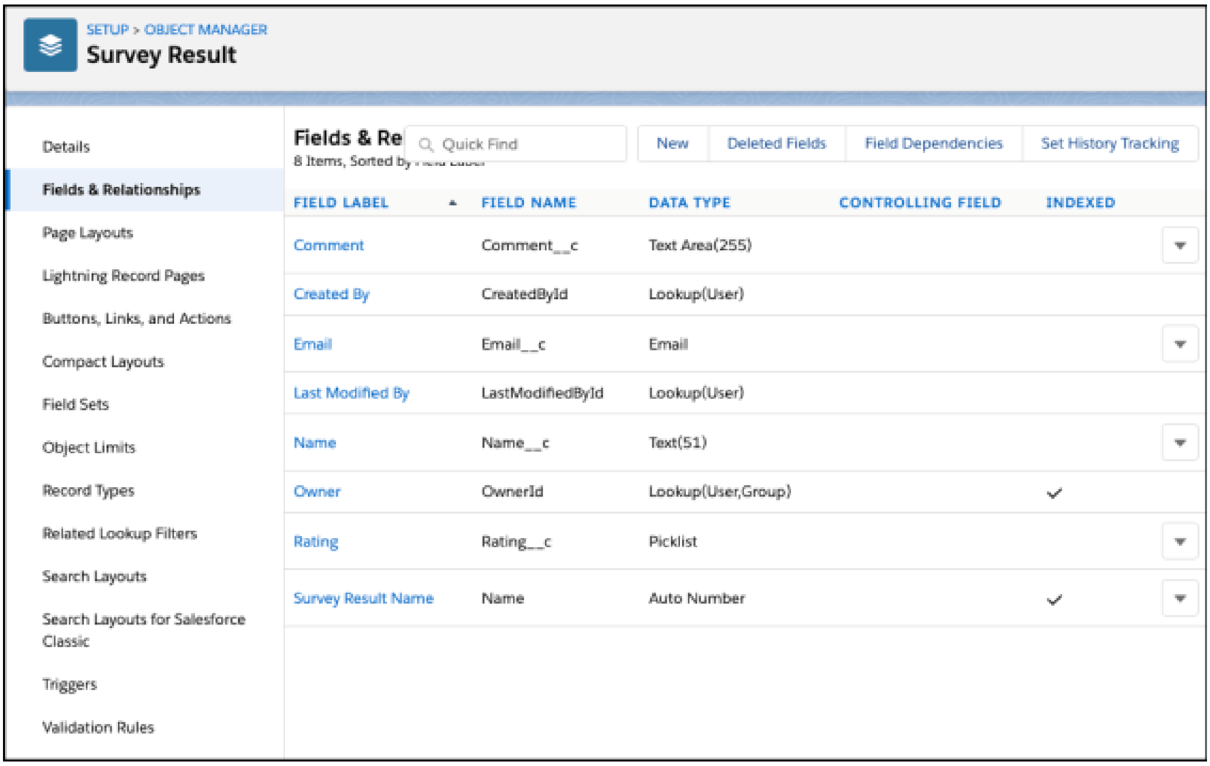


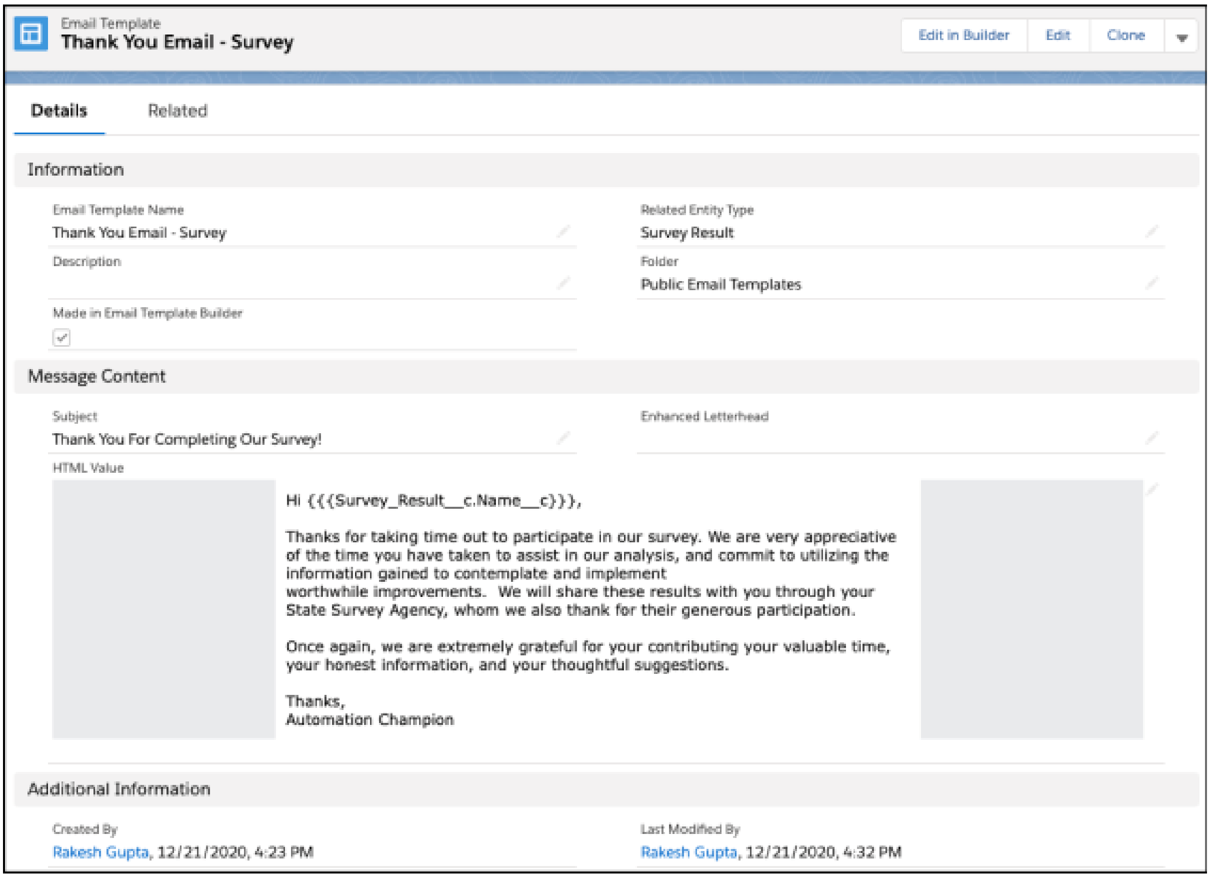
4.Create a screen flow for a basic survey to fill in the details for any form.

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.



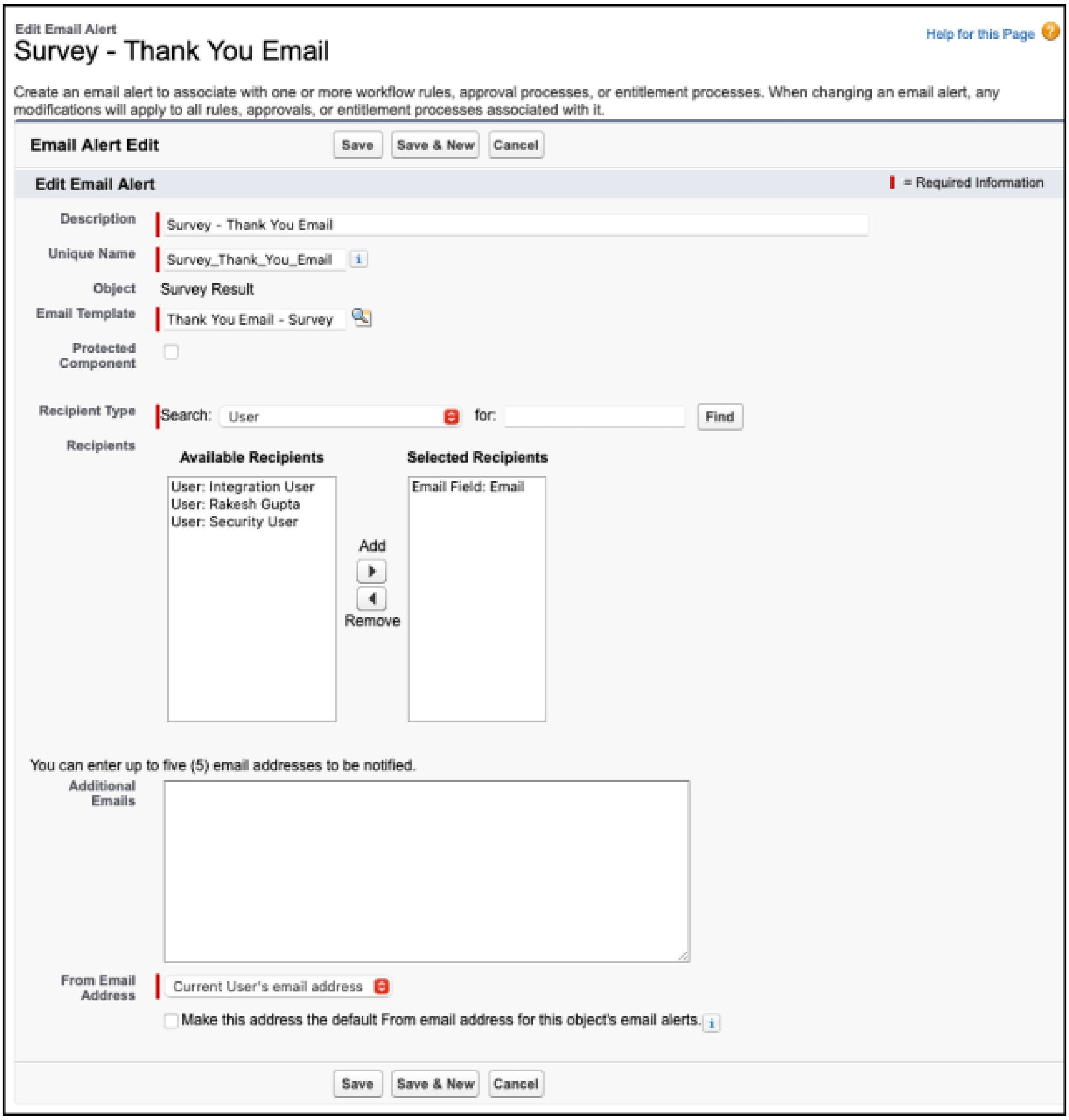
Step 2: Create a Thank You For Survey Lightning Email Template

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

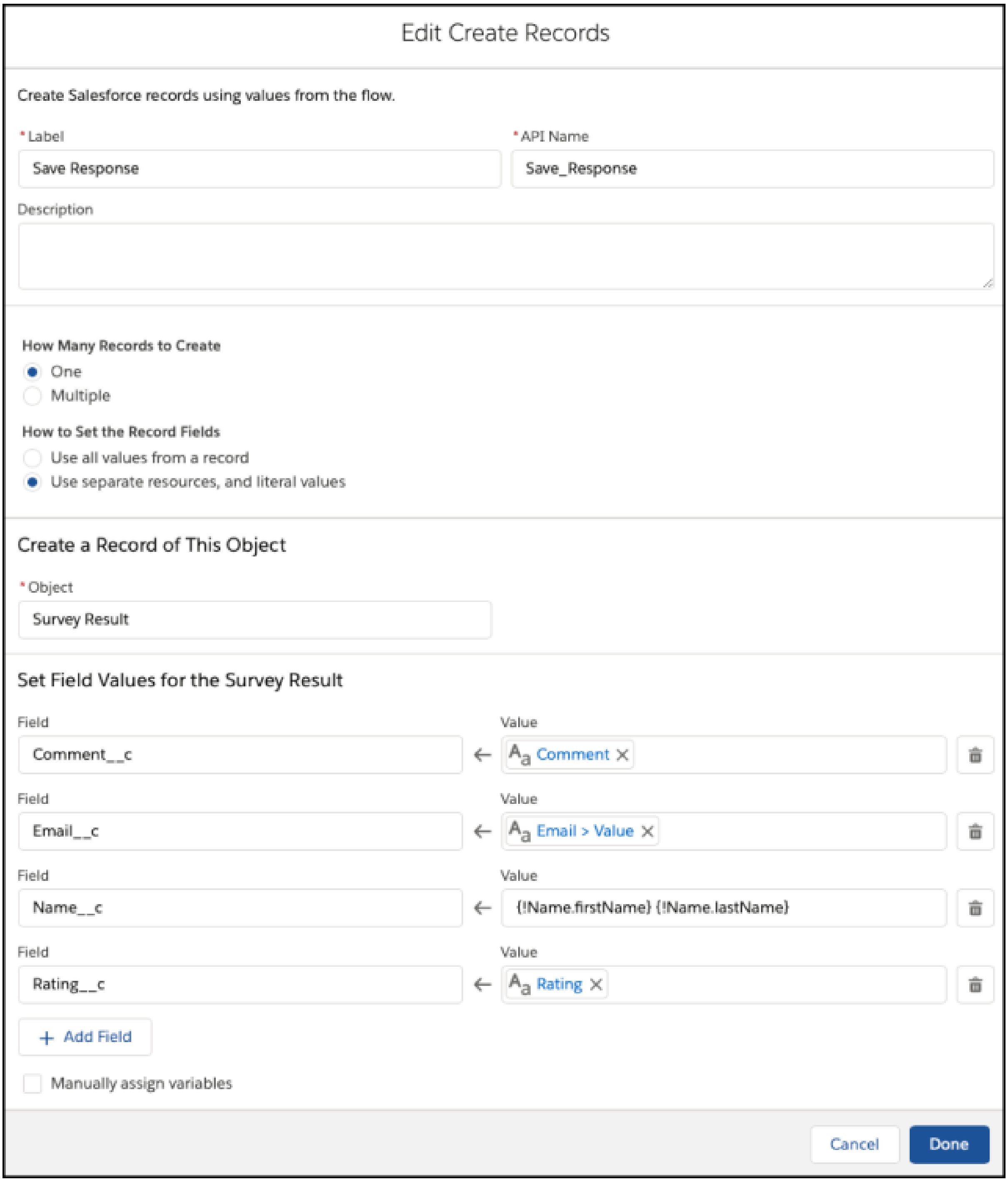
Row 1:
Field: Comment__c
Value: {!Comment}
Click Add Row

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}

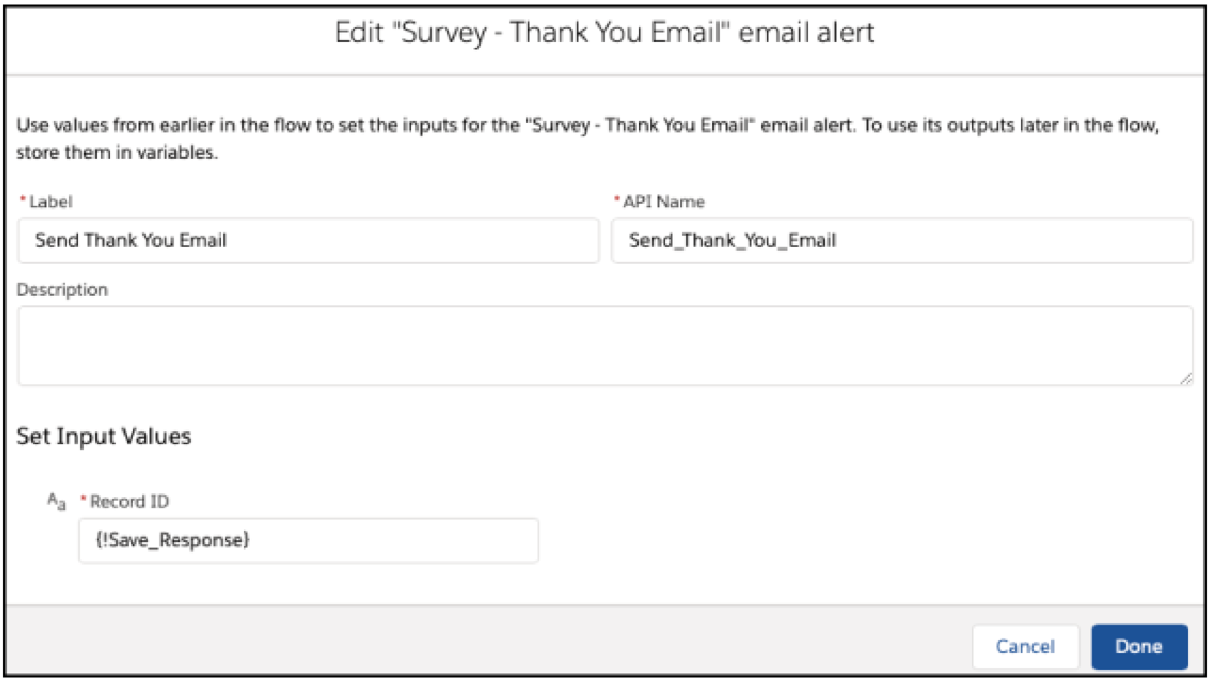
7.Click Done.

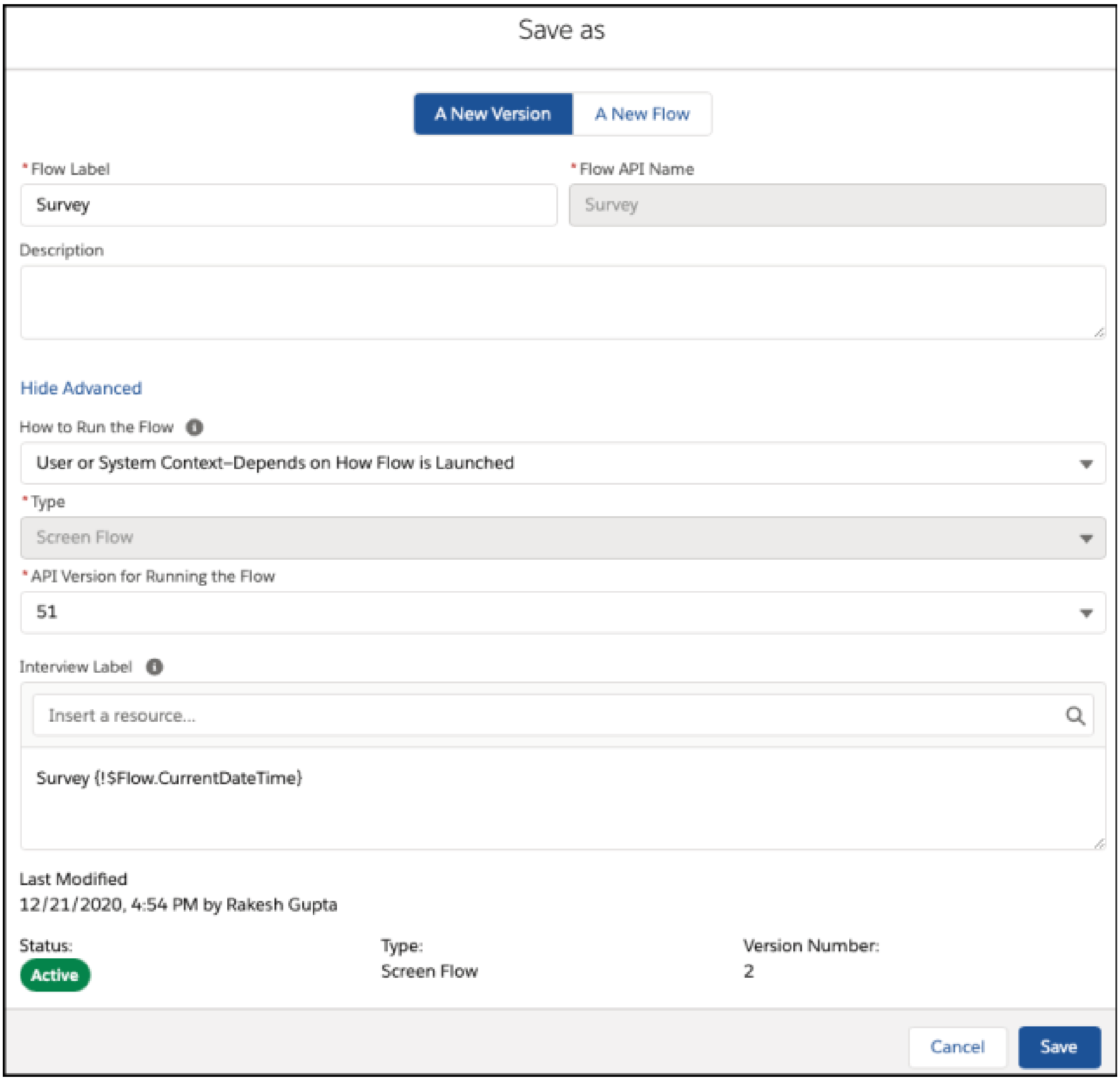


Step 4.3: Salesforce Flow – Call an Acton – Email Alert to Send Out Thank You Email

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.

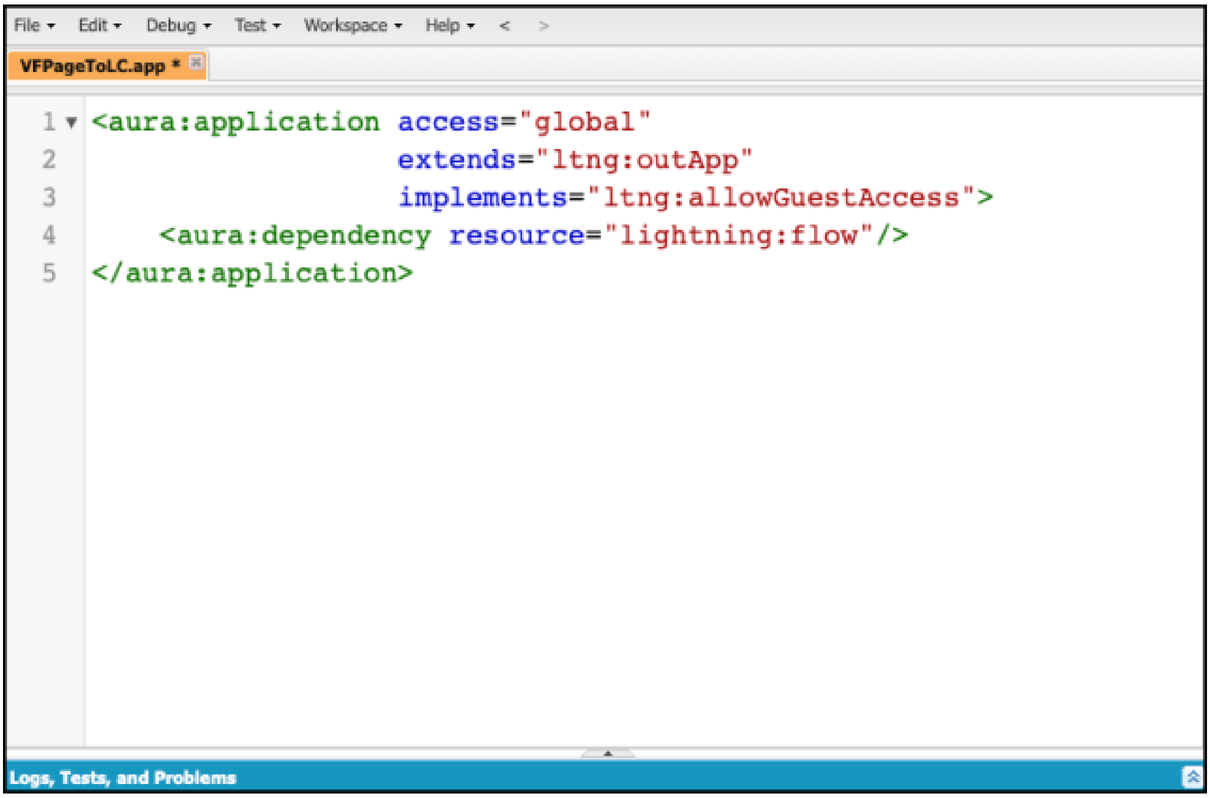
4.Clicks on the Survey – Thank You Email email alert.
5.Click Done.

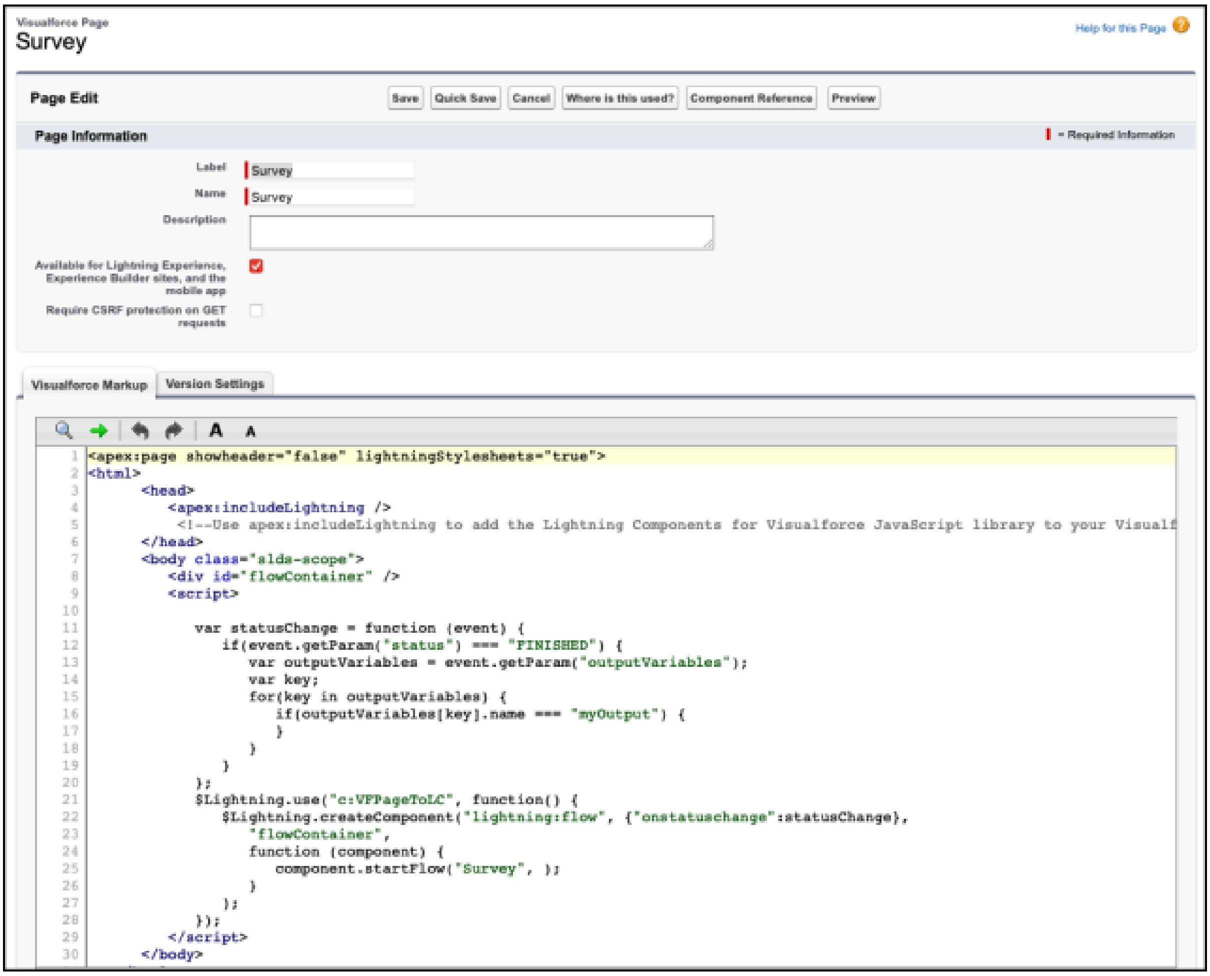




Step 5: Create a Lightning Application to Render Lightning Runtime for Flow in a Visualforce Page

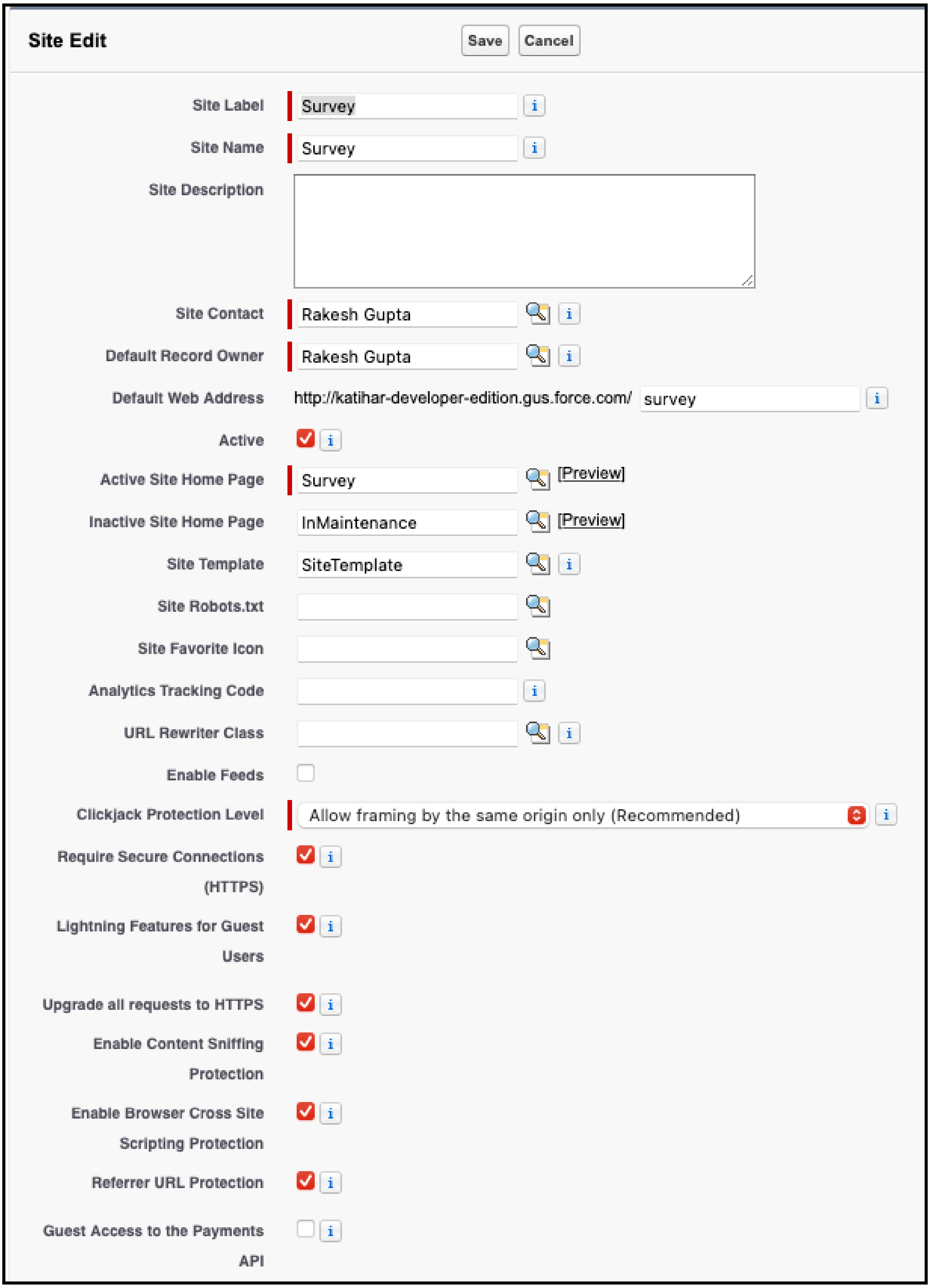
Now we will create a Lightning Application that declares a dependency on the lightning:flow component.
1.Click Setup | Developer Console
2.Navigate to File | New | Lightning Application
3.Enter a Name (VFPageToLC) field, make sure to select the Lightning Out Dependency App checkbox.
4.Click Submit.
5.Copy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

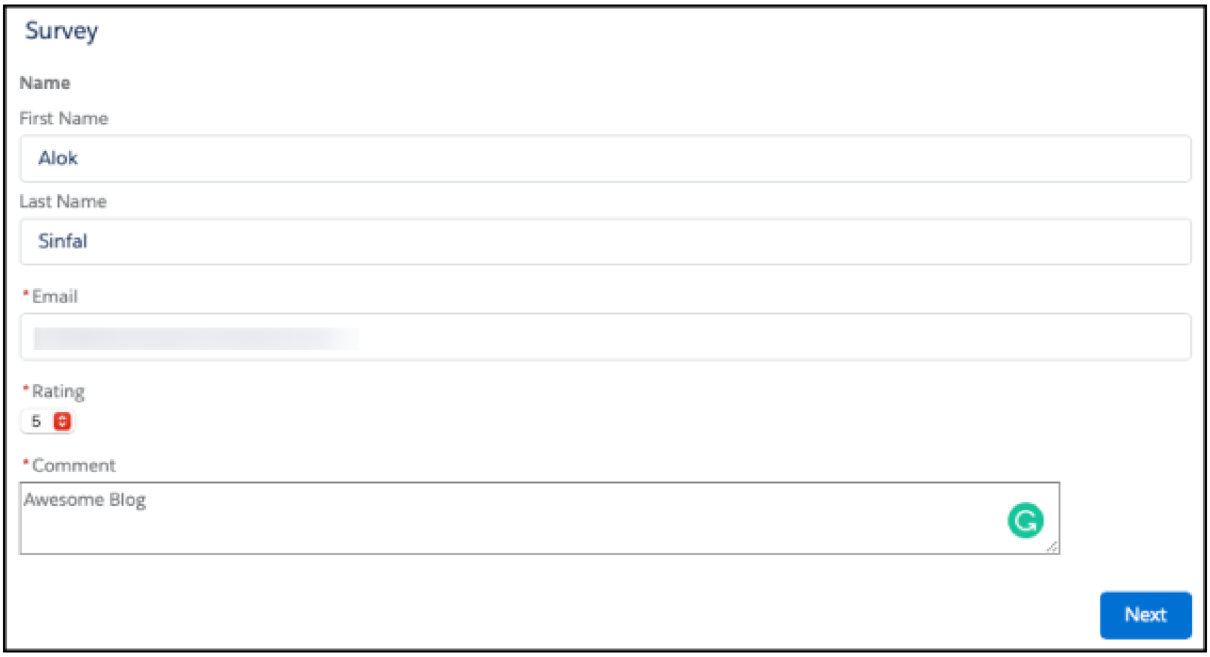
Now we will create a site to open the flow for unauthenticated access.
1.Click Setup.
2.In the Quick Find box, type Sites.
3.Clicks on the New button.
4.Fill the details as per the screenshot below:
5.Click Save.



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.