NAAN MUDHALVAN
Salesforce Developer (Course)
Assignment no 1

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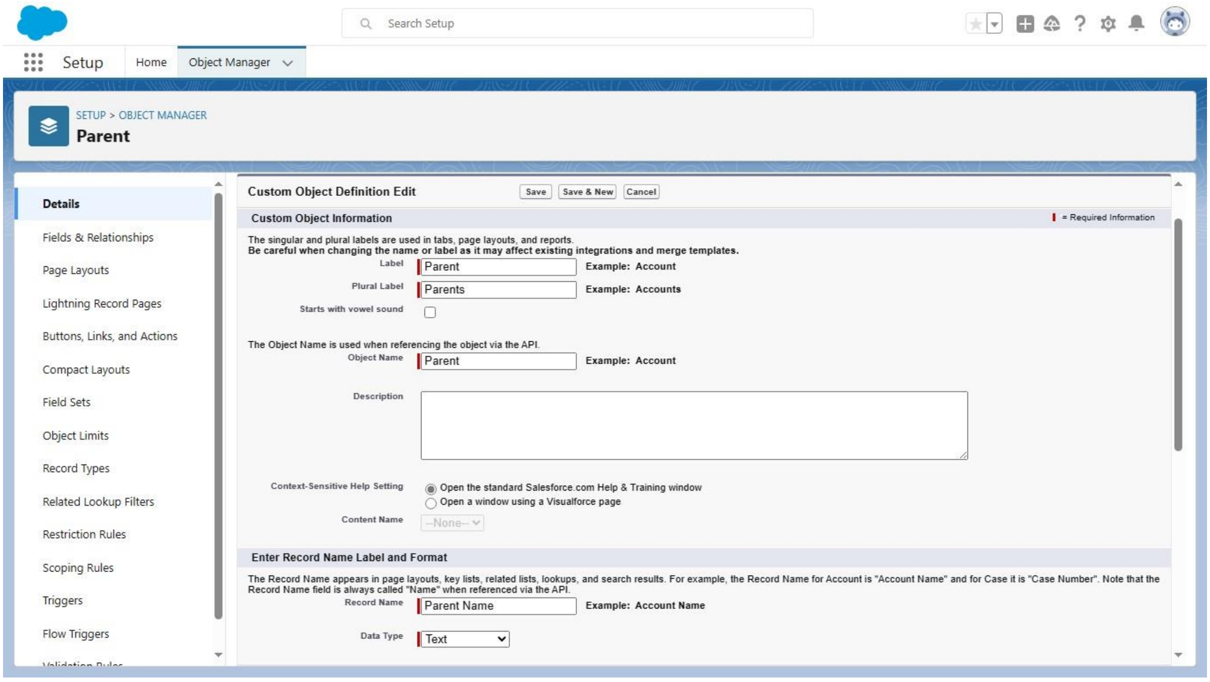
Year & Dep : IV year & CSBS

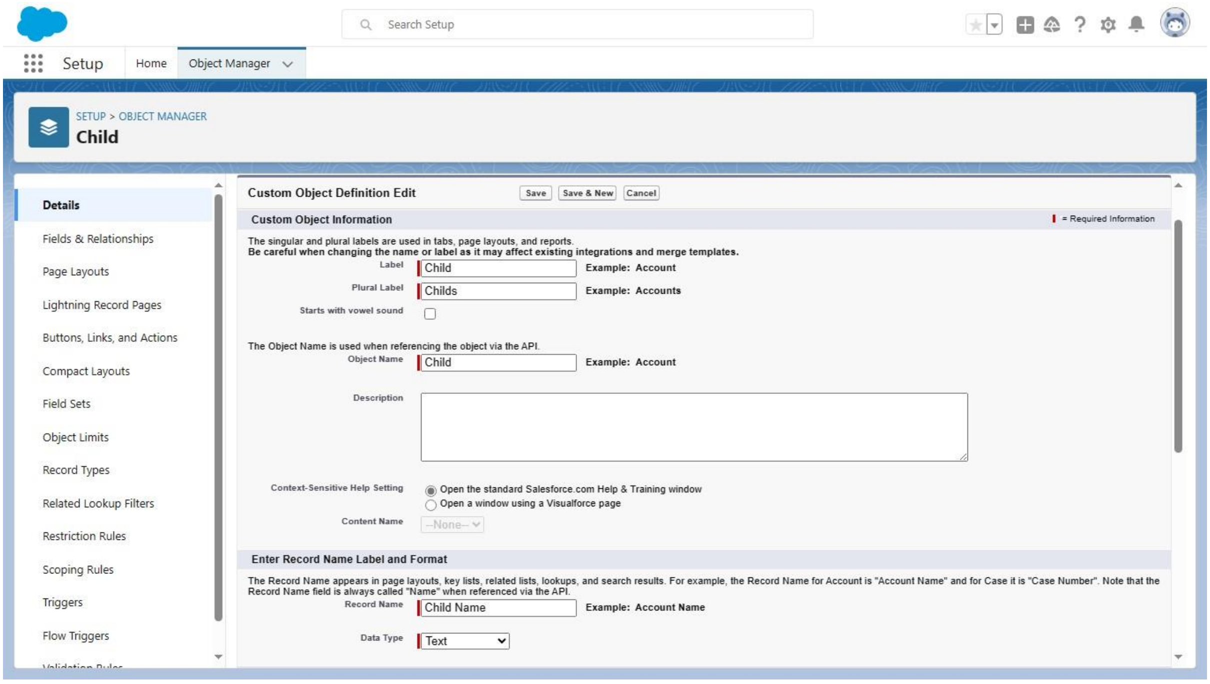
Batch : 2024

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.

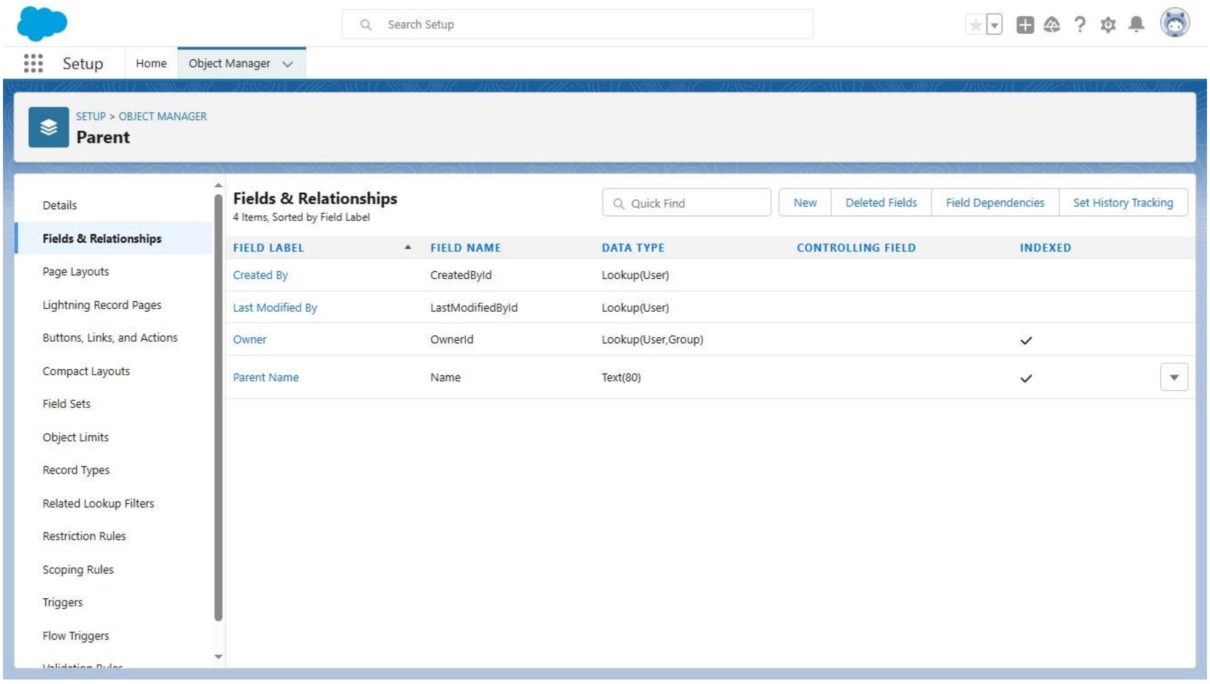
4. In the "Custom Fields & Relationships" section, click "New" under "Related To".

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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Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Triggers
Flow Triggers
Fields & Relationships
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Quick Find
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Deleted Fields
Field Dependencies
Set History Tracking
FIELD LABEL
FIELD NAME
DATA TYPE
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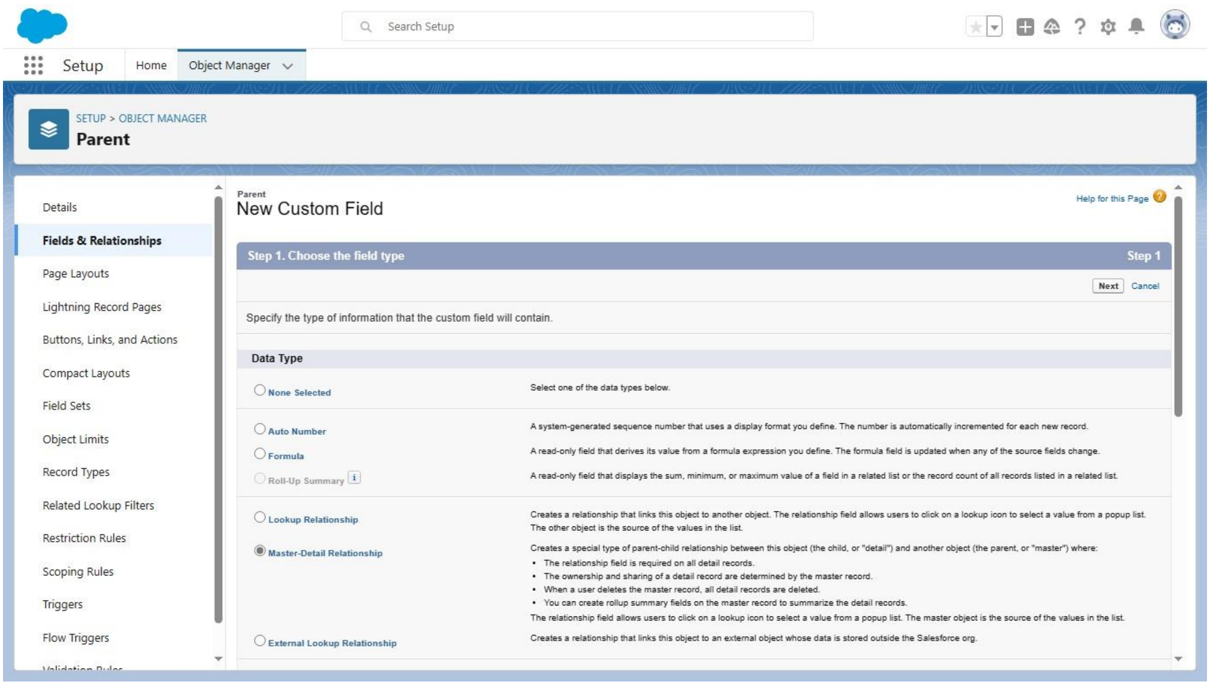
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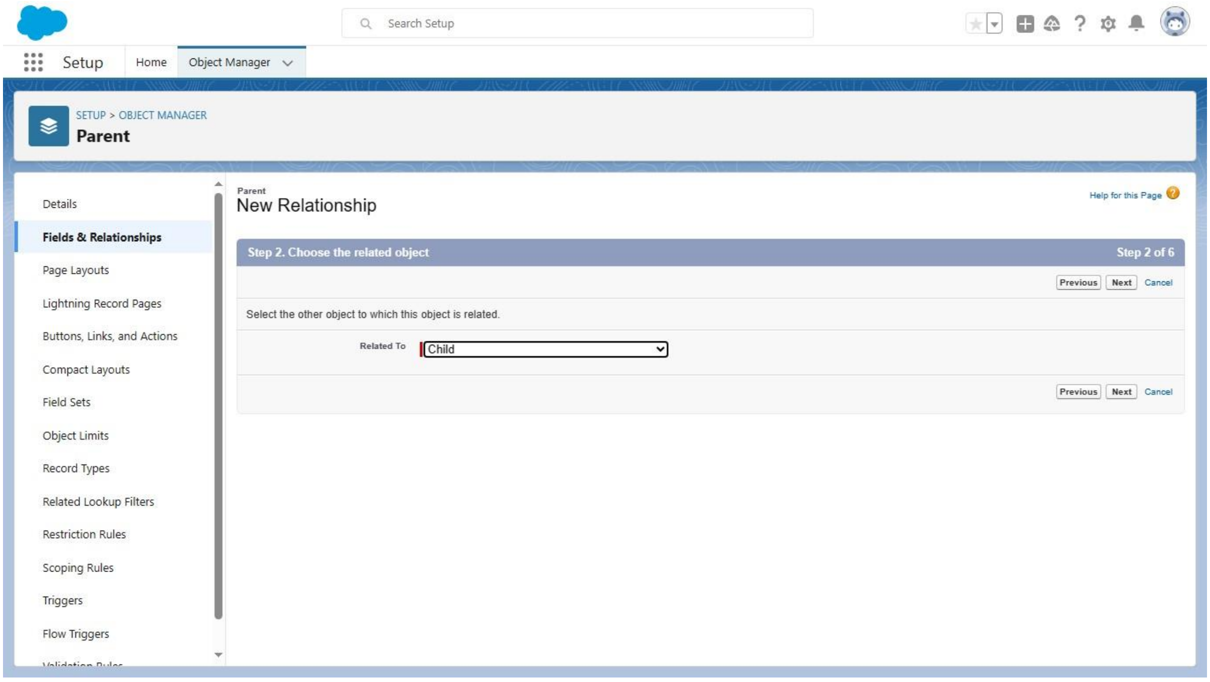
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Triggers
Flow Triggers
Parent
New Custom Field
Help for this Page
Step 1. Choose the field type
Step 1
Next
Cancel
Specify the type of information that the custom field will contain.
Data Type
None Selected
Select one of 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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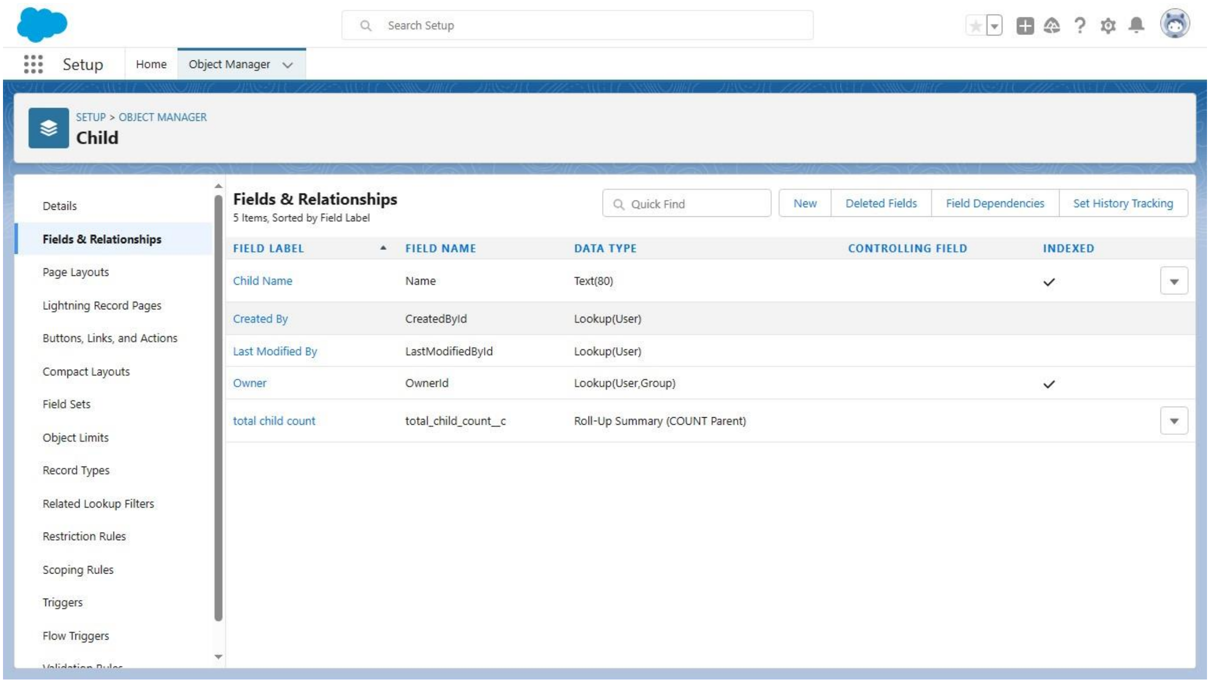
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Triggers
Flow Triggers
Parent
New Relationship
Help for this Page
Step 2. Choose the related object
Step 2 of 6
Previous Next Cancel
Select the other object to which this object is related.
Related To
Child
Previous Next Cancel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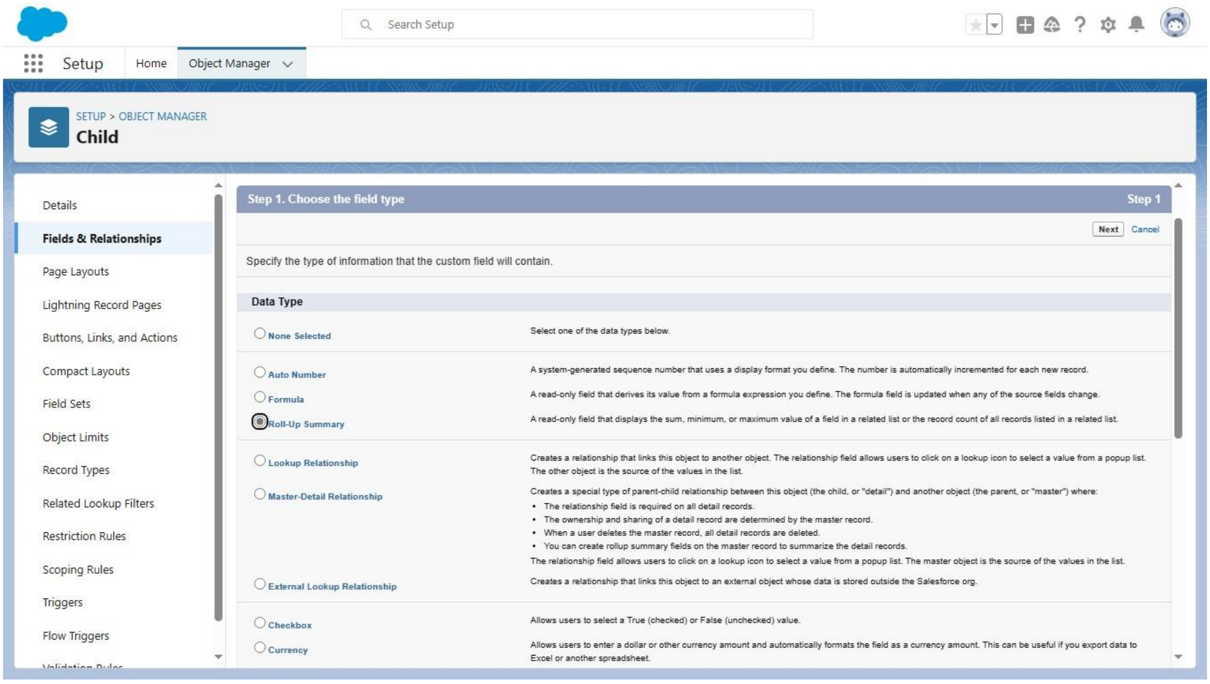
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Triggers
Flow Triggers
Fields & Relationships
5 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIELD
INDEXED
Child Name
Name
Text(80)
Created 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."

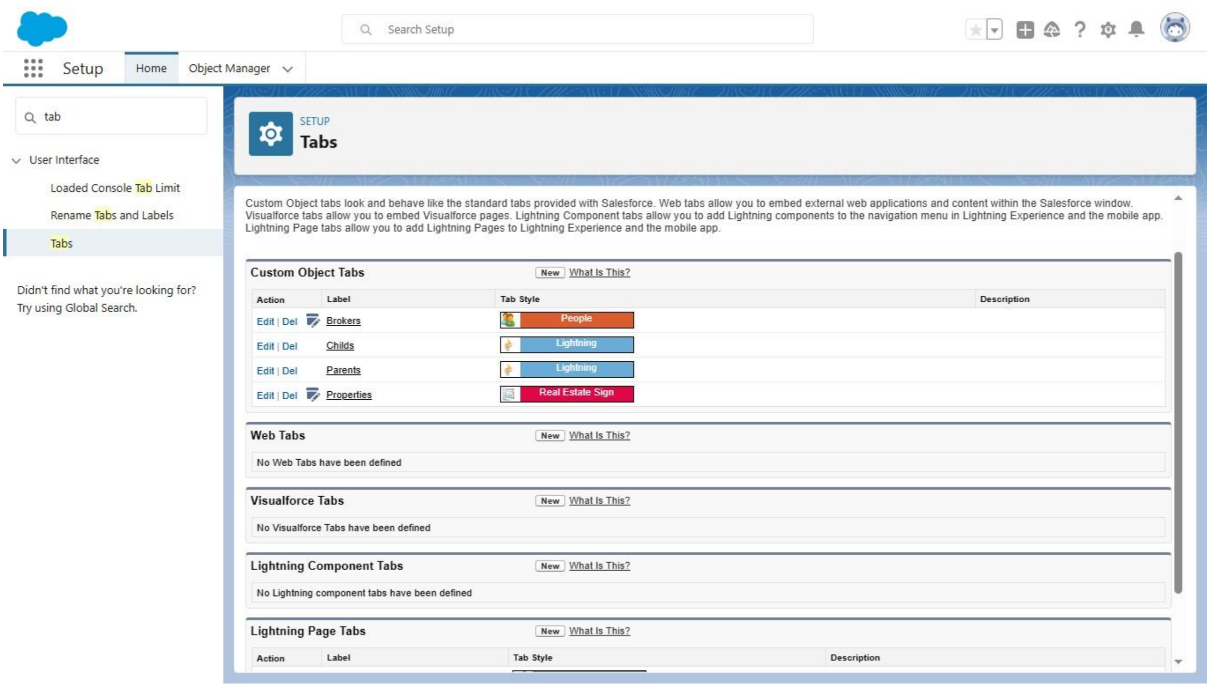
3. Choose the "Child" as the child object for which you want to calculate the total.

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").

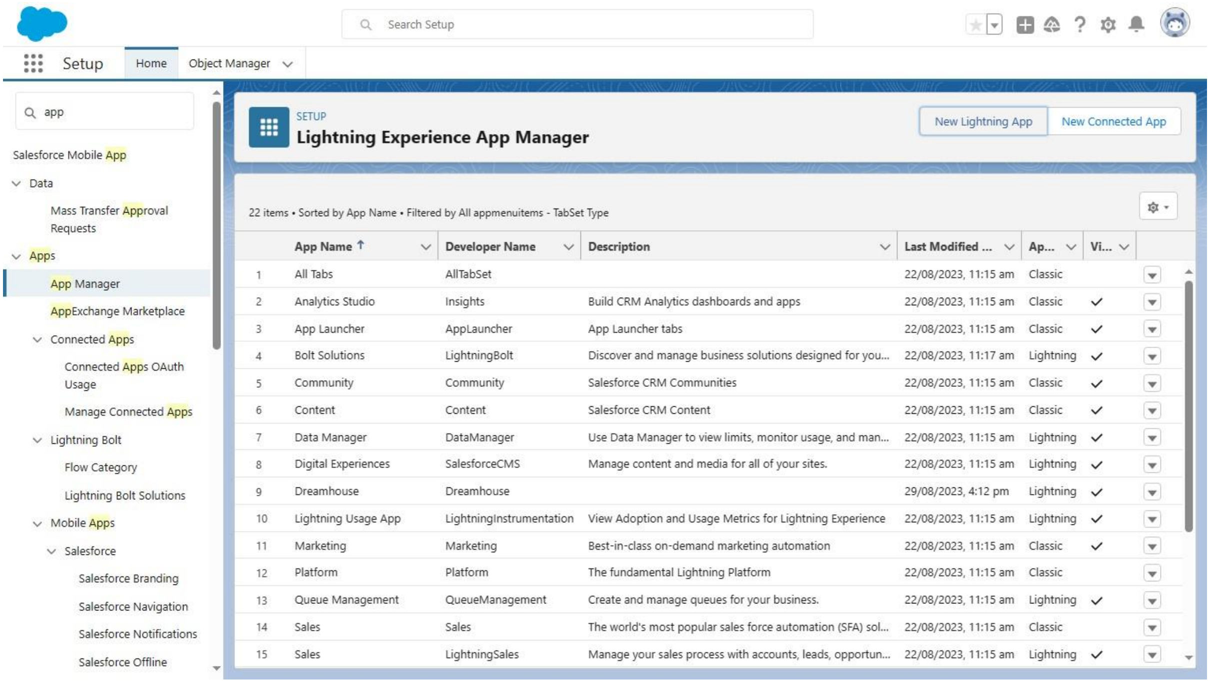
6. Configure any additional filter criteria if needed.

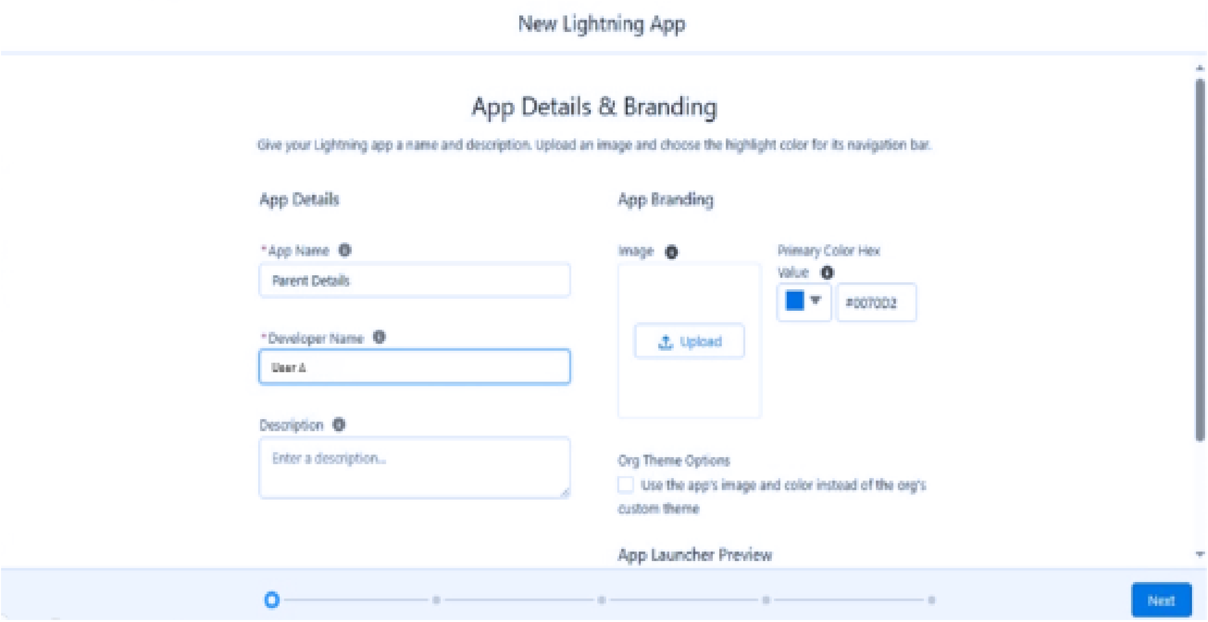
7. Save the changes.



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.

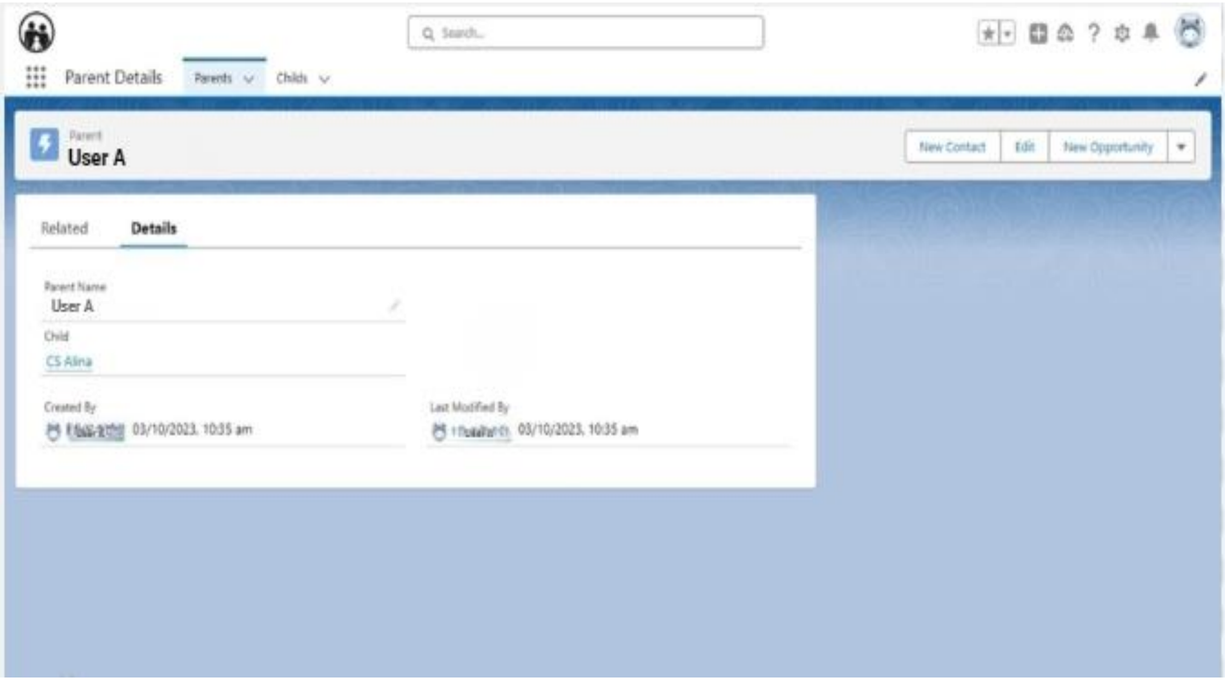




Step 5: Test the Relationship and Roll-Up Summary Field

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

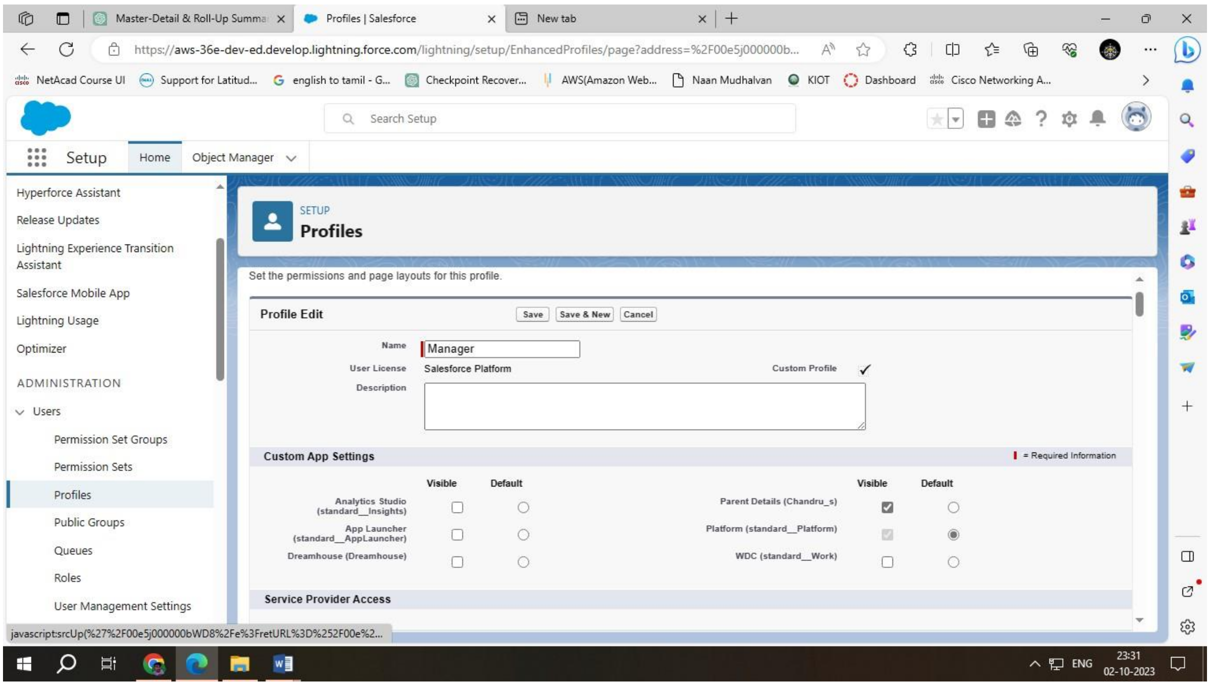
1. Go to "Setup" in Salesforce.

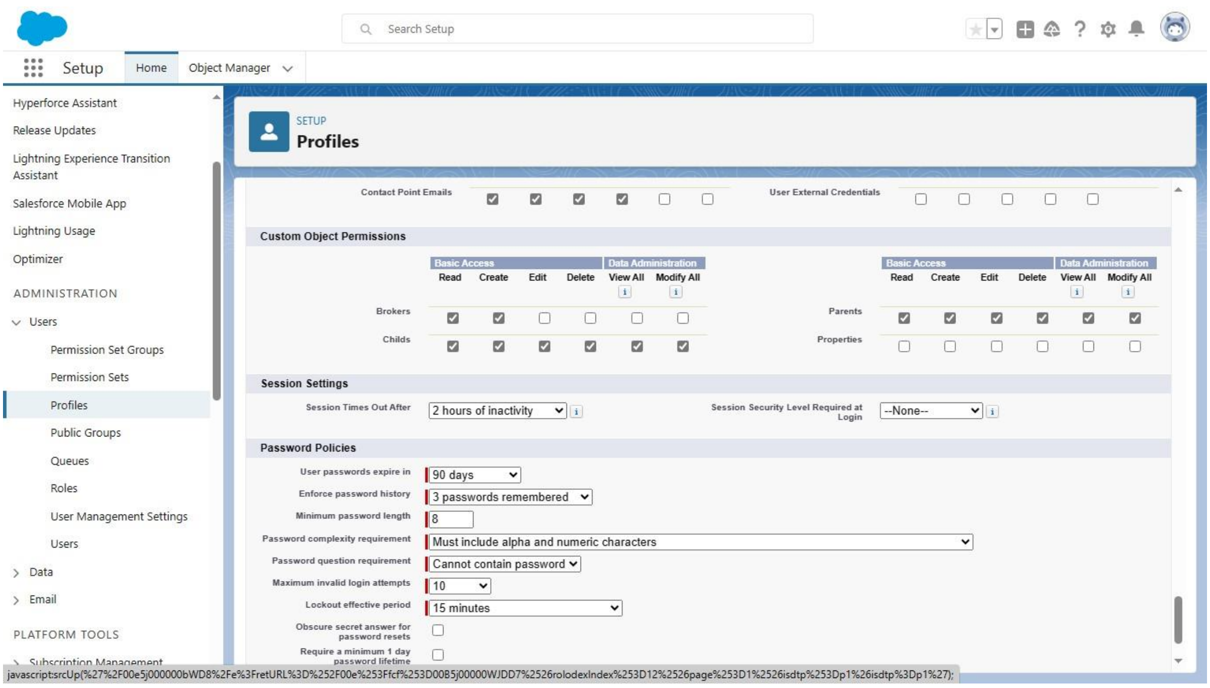
2. In the Quick Find box, type "Public Groups" and select it.

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.

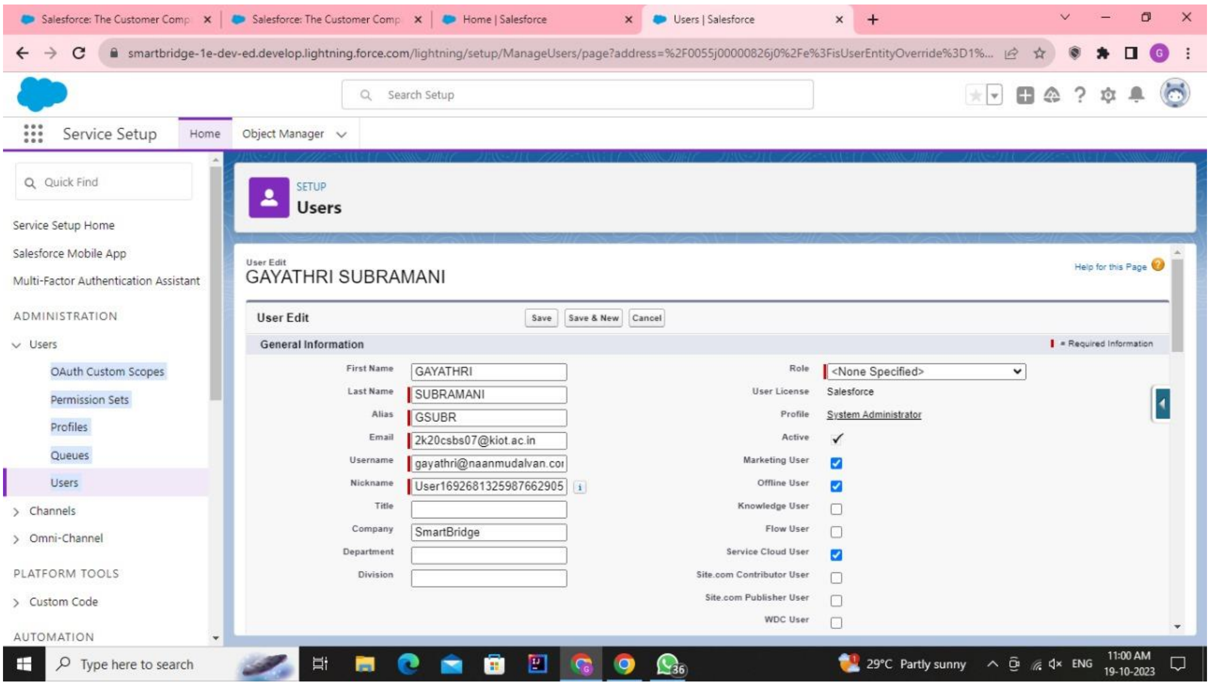
2. In the Quick Find box, type "Sharing Rules" and select "Sharing Settings."

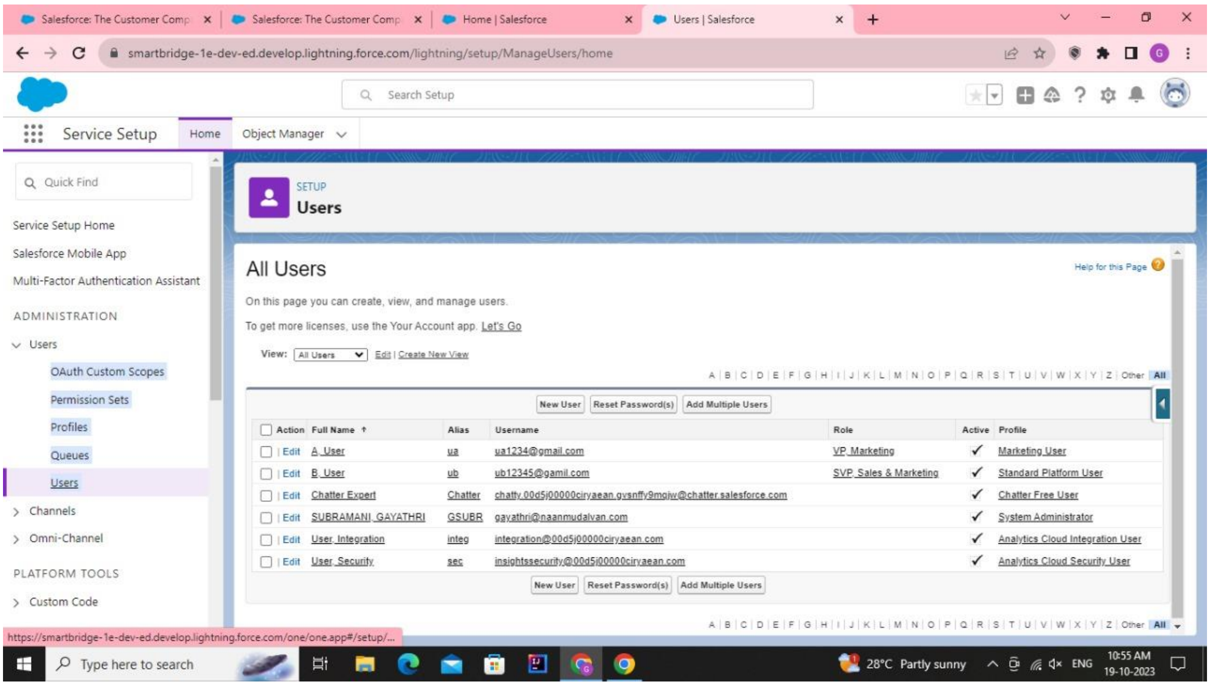
3. Under "Account Sharing Rules," click on "New Sharing Rule."

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.




Service Setup
Home
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SETUP
Users
All Users
On this page you can create, view, and manage users.
To get more licenses, use the Your Account app. Let's Go
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Multi-Factor Authentication Assistant
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New User
Reset Password(s)
Add Multiple Users
Action Full Name Alias Username Role Active Profile
Edit A, User ua ua1234@gmail.com VP, Marketing Marketing User
Edit B, User ub ub12345@gamil.com SVP, Sales & Marketing Standard Platform User
Edit Chatter Expert Chatter Chatter Free User
Edit SUBRAMANI, GAYATHRI GSUBR gayathri@naanmudalvan.com System Administrator
Edit User, Integration integ Analytics Cloud Integration User
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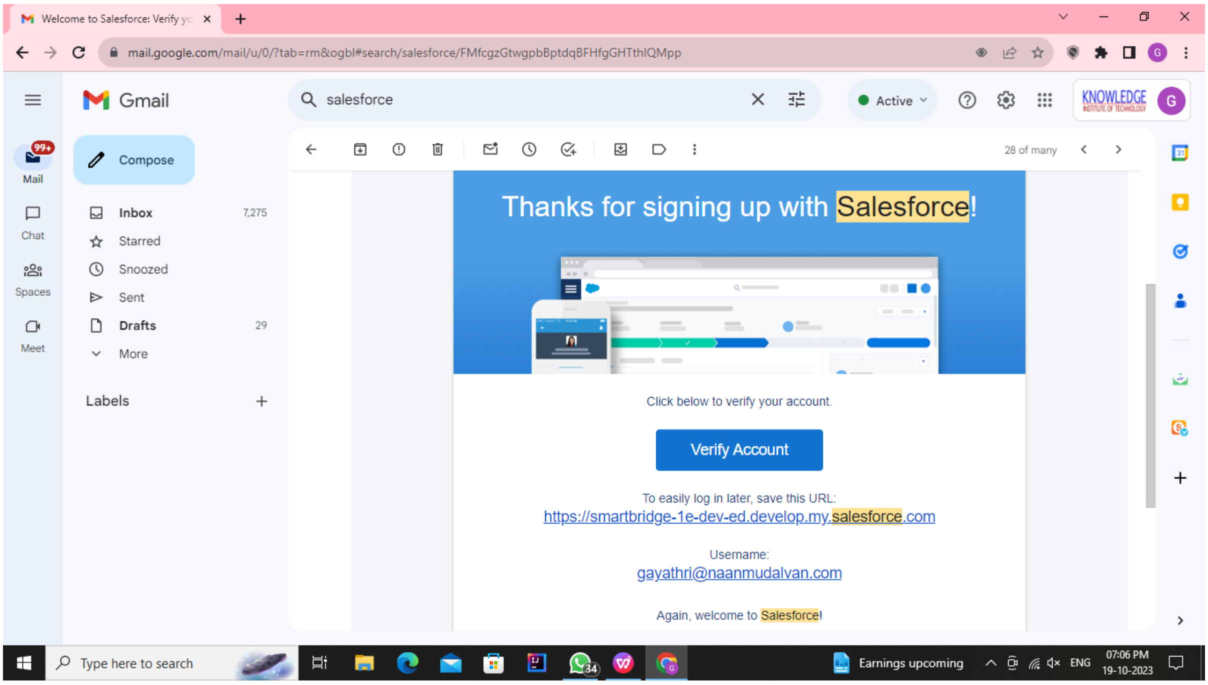
Gmail
Compose
Inbox 7,275
Starred
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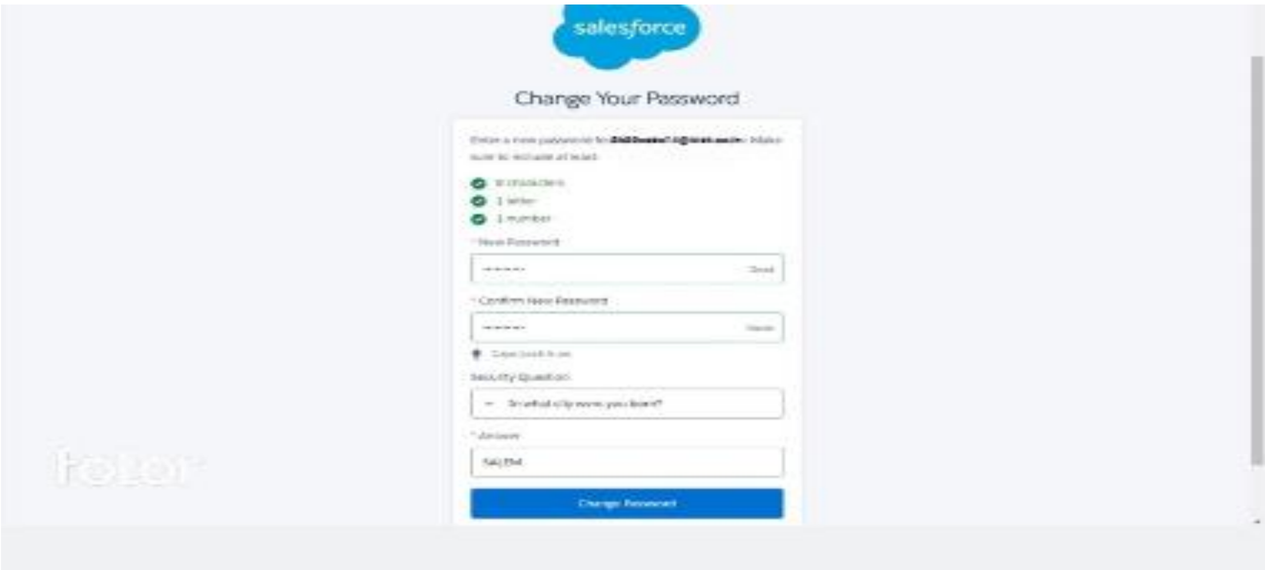
Thanks for signing up with Salesforce!
Click below to verify your account.
Verify Account
To easily log in later, save this URL:
https://smartbridge-1e-dev-ed.develop.my.salesforce.com
Username:
gayathri@naanmudalvan.com
Again, welcome to Salesforce!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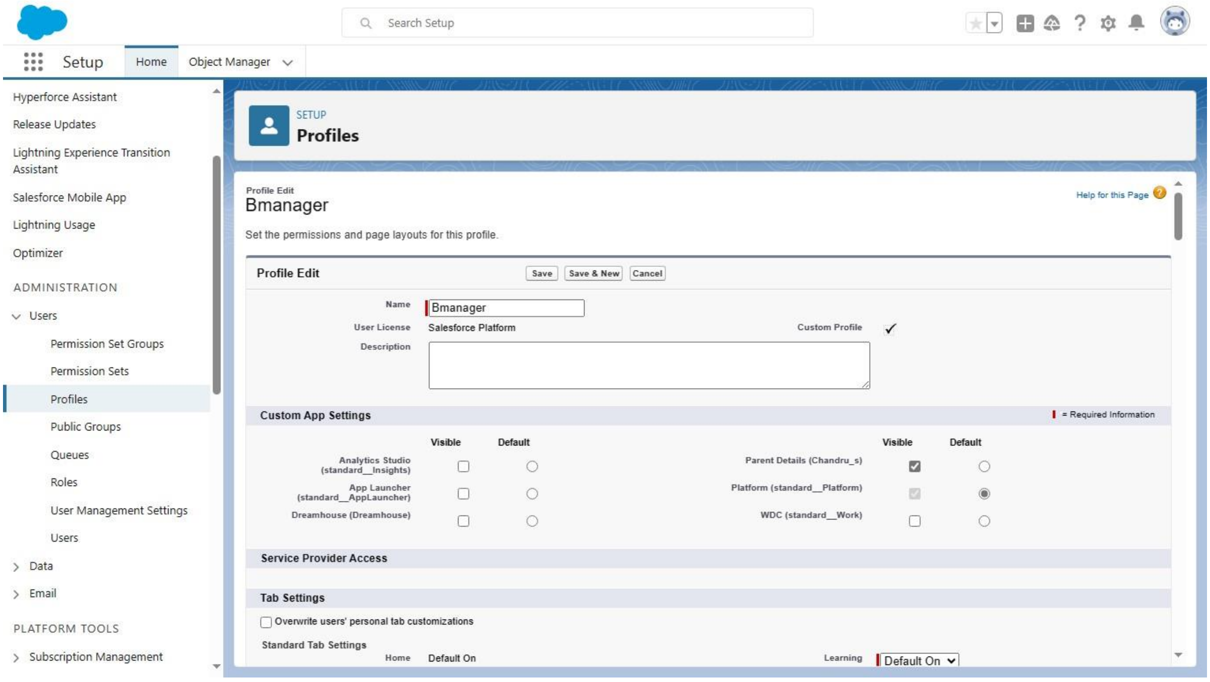
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Analytics Studio (standard__Insights)
App Launcher (standard__AppLauncher)
Dreamhouse (Dreamhouse)
Parent Details (Chandru_s)
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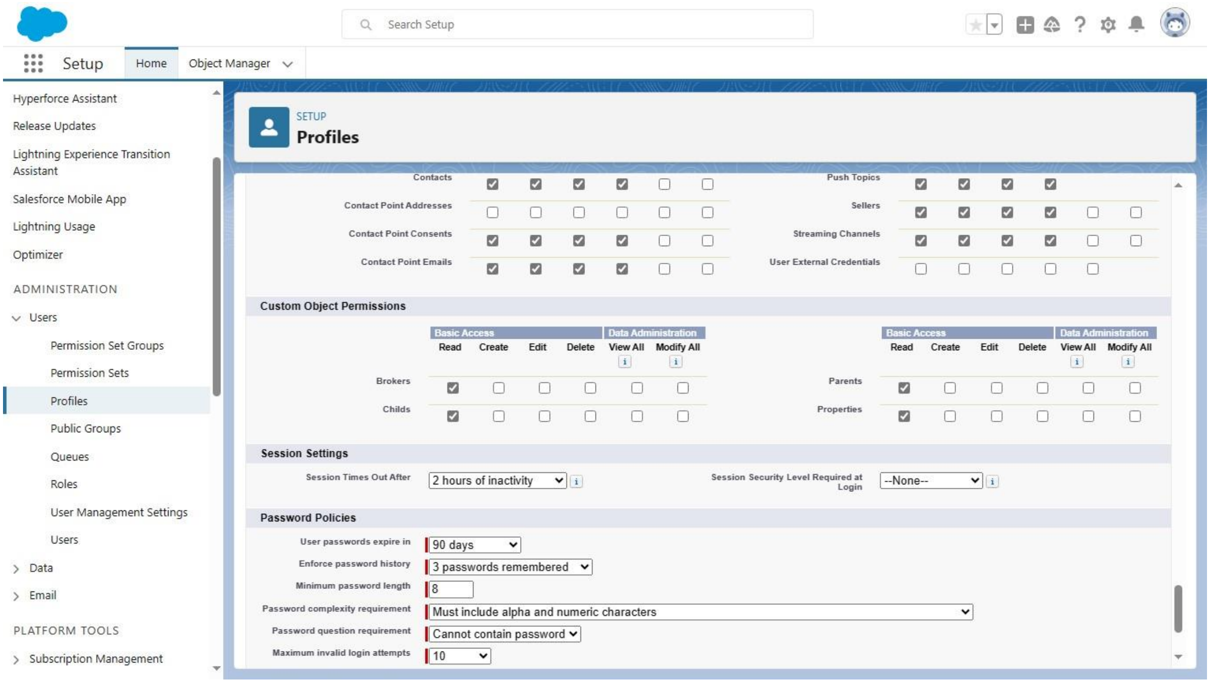


For User B:

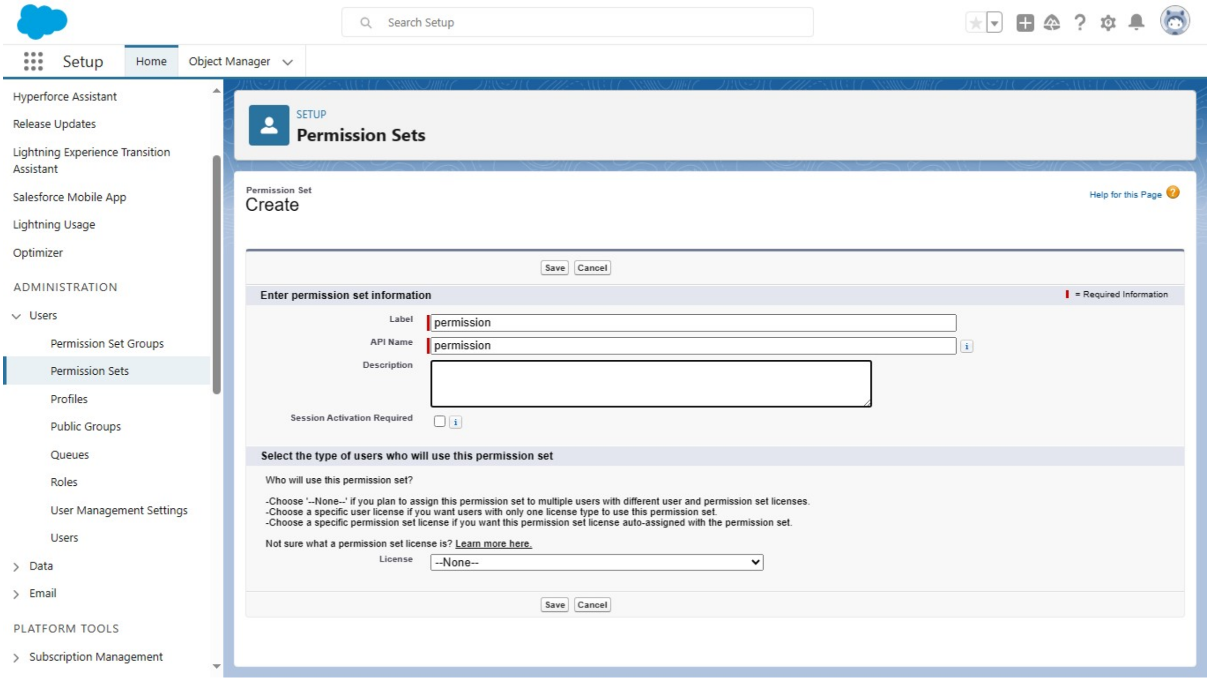
1. Follow the same steps as above but create a separate sharing rule for User B.

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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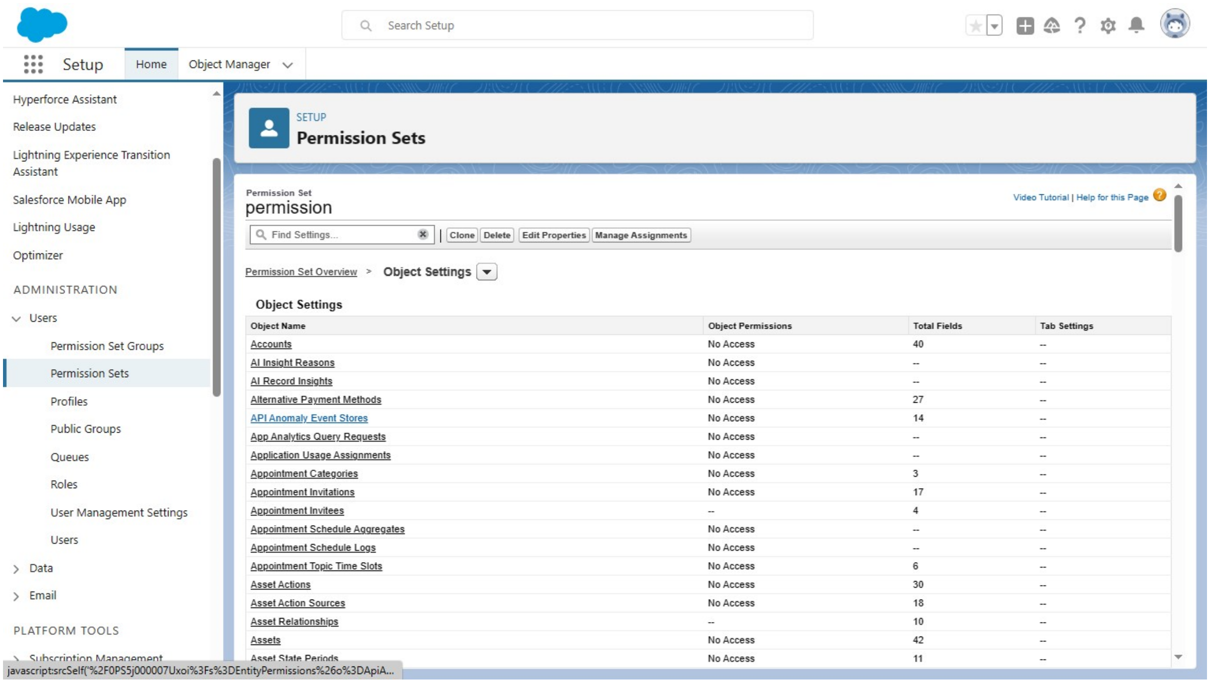
SETUP
Permission Sets
Permission Set
Create
Help for this Page
Save
Cancel
Enter permission set information
= Required Information
Label
permission
API Name
permission
Description
Session Activation Required
Select the type of users who will use this permission set
Who will use this permission set?
-Choose '--None--' if you plan to assign this permission set to multiple users with different user and permission set licenses.
-Choose a specific user license if you want users with only one license type to use this permission set.
-Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.
Not sure what a permission set license is? Learn more here.
License
--None--
Save
Cancel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AI Record Insights No Access -- --
Alternative Payment Methods No Access 27 --
API Anomaly Event Stores No Access 14 --
App Analytics Query Requests No Access -- --
Application Usage Assignments No Access -- --
Appointment Categories No Access 3 --
Appointment Invitations No Access 17 --
Appointment Invitees -- 4 --
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Appointment Schedule Logs No Access -- --
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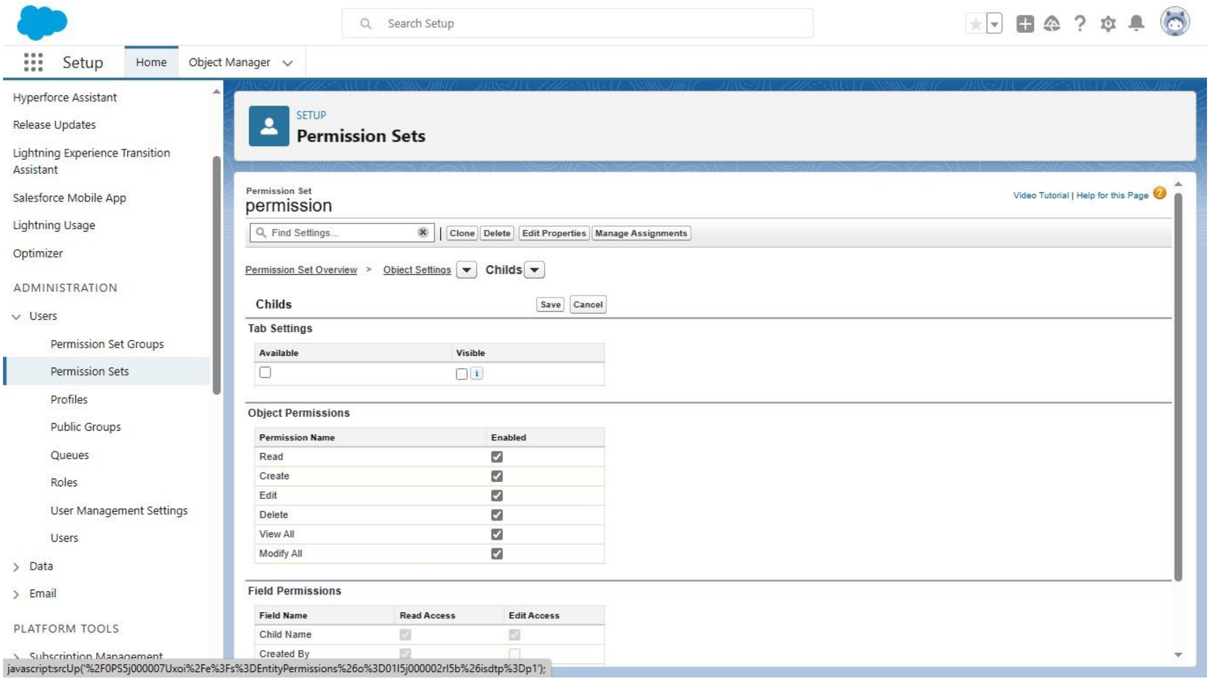
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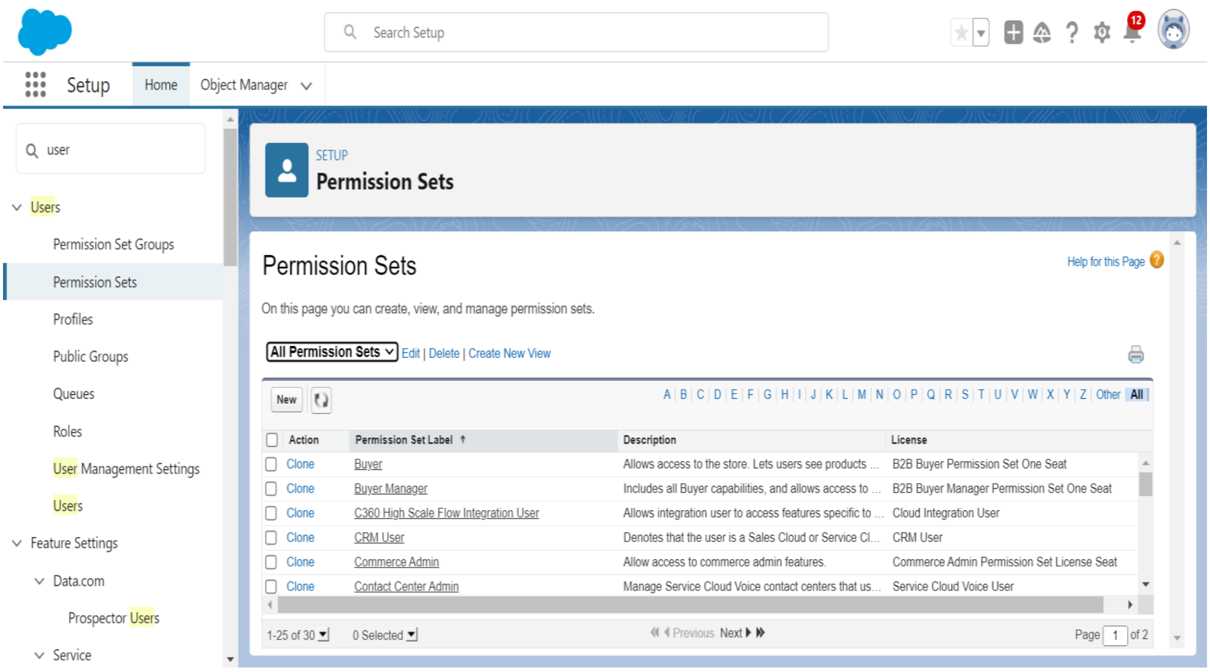
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Service
SETUP
Permission Sets
Permission Sets
Help for this Page
On this page you can create, view, and manage permission sets.
All Permission Sets
Edit | Delete | Create New View
New
A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All
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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
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Allows integration user to access features specific to ...
Cloud Integration User
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CRM User
Denotes that the user is a Sales Cloud or Service Cl...
CRM User
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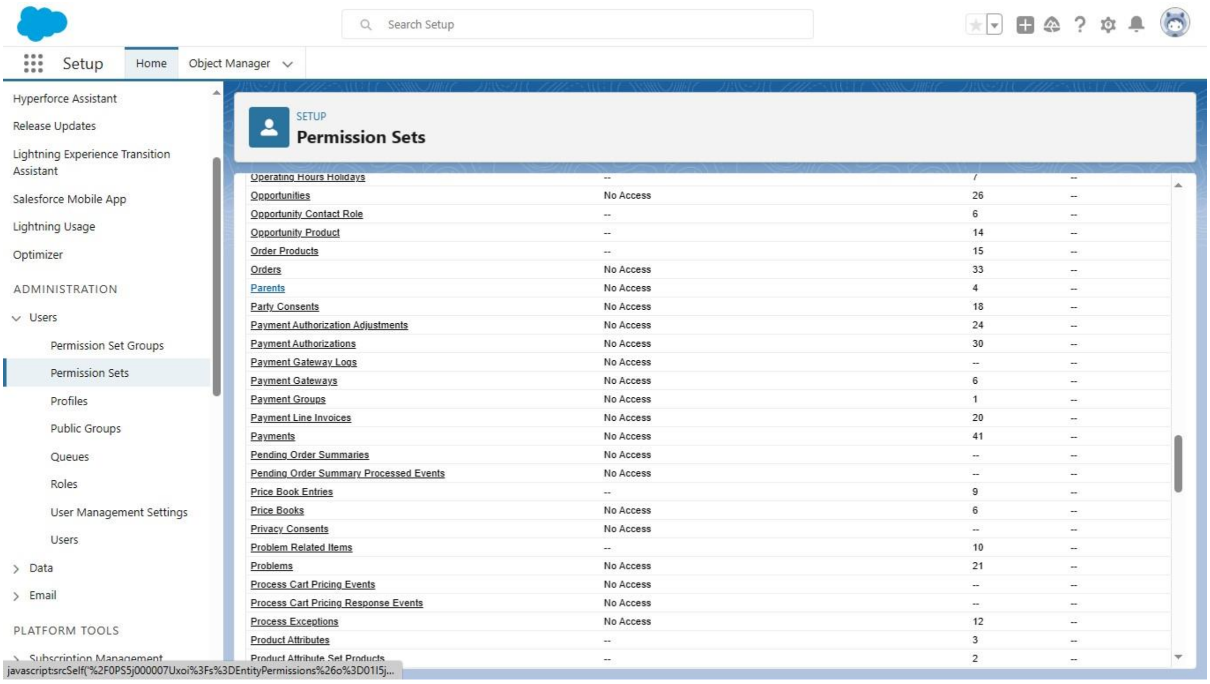

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Opportunity Contact Role -- 6 --
Opportunity Product -- 14 --
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Orders No Access 33 --
Parents No Access 4 --
Party Consents No Access 18 --
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Payment 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 -- --
Pending Order Summary Processed Events No Access -- --
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 -- --
Process Exceptions No Access 12 --
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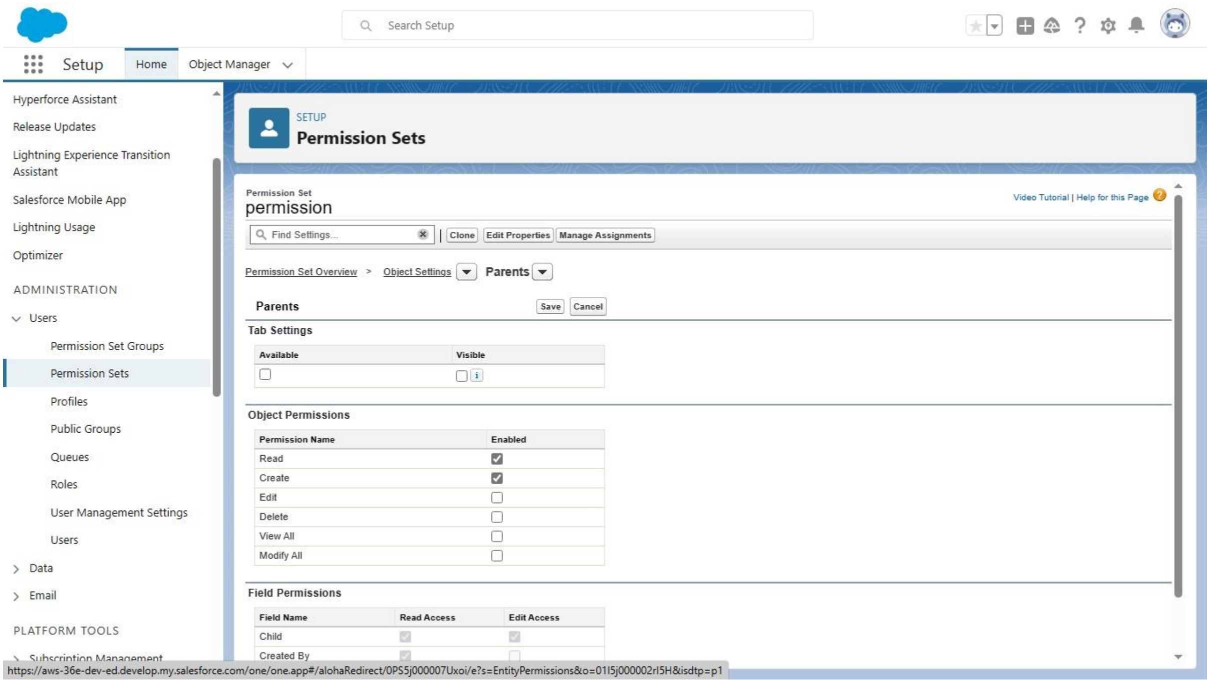

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3.Suppose there are 2 Users and they are having Create, Read, Edit access on Account Object with the same profile but we want to open up the access for one user to delete how will you implement the Security setting.

Step 1: Create a Permission Set for Delete Access

1. Go to "Setup" in Salesforce.

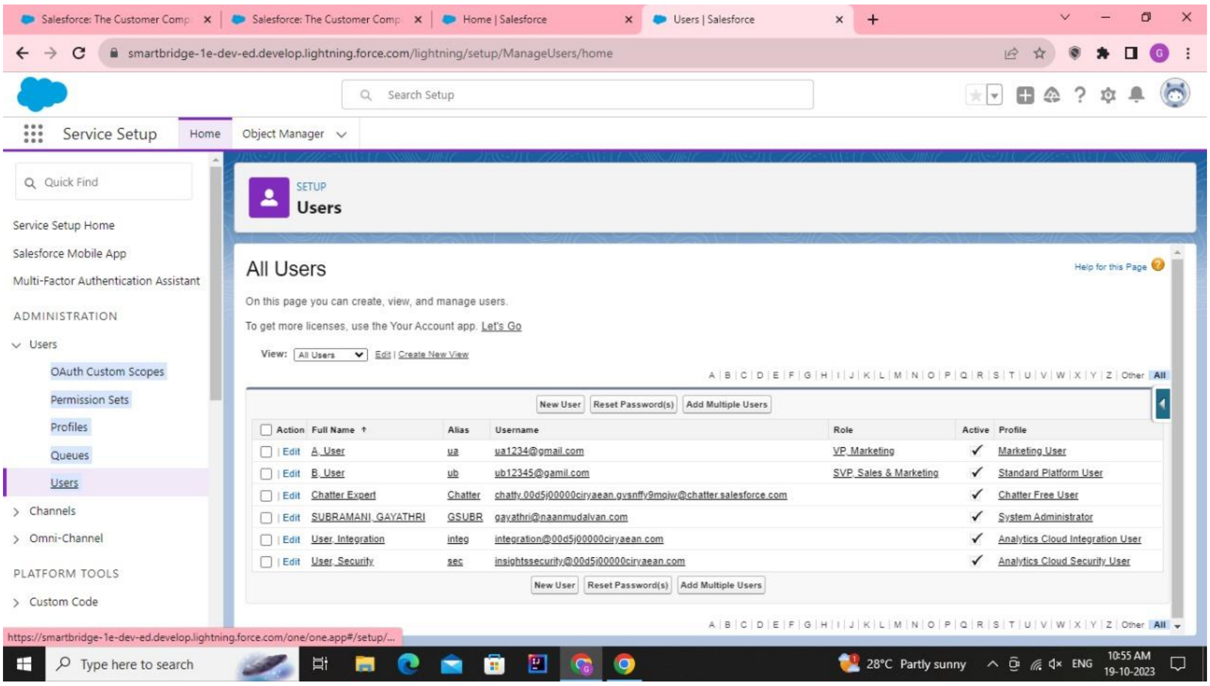
2. In the Quick Find box, type "Permission Sets" and select it.

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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Queues
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Channels
Omni-Channel
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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
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Profile
Edit A, User ua ua1234@gmail.com VP, Marketing Marketing User
Edit B, User ub ub12345@gamil.com SVP, Sales & Marketing Standard Platform User
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Edit SUBRAMANI, GAYATHRI GSUBR gayathri@naanmudalvan.com System Administrator
Edit User, Integration integ integration@00d5j00000ciryaean.com Analytics Cloud Integration User
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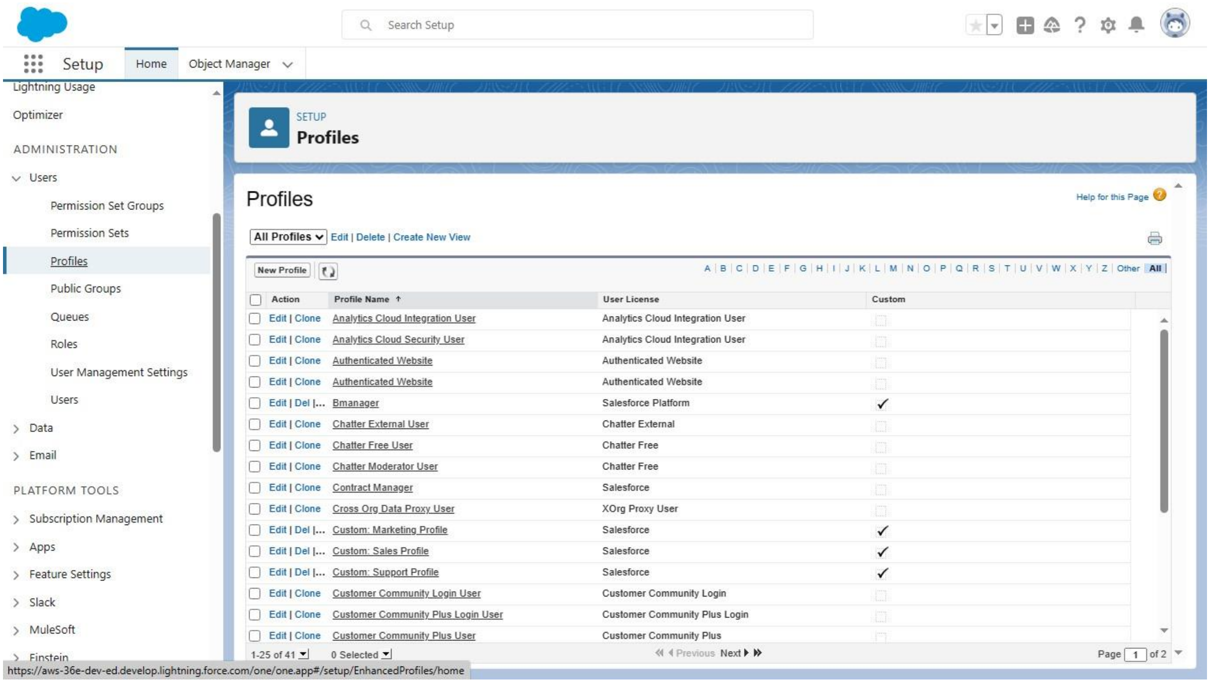
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Slack
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1-25 of 41
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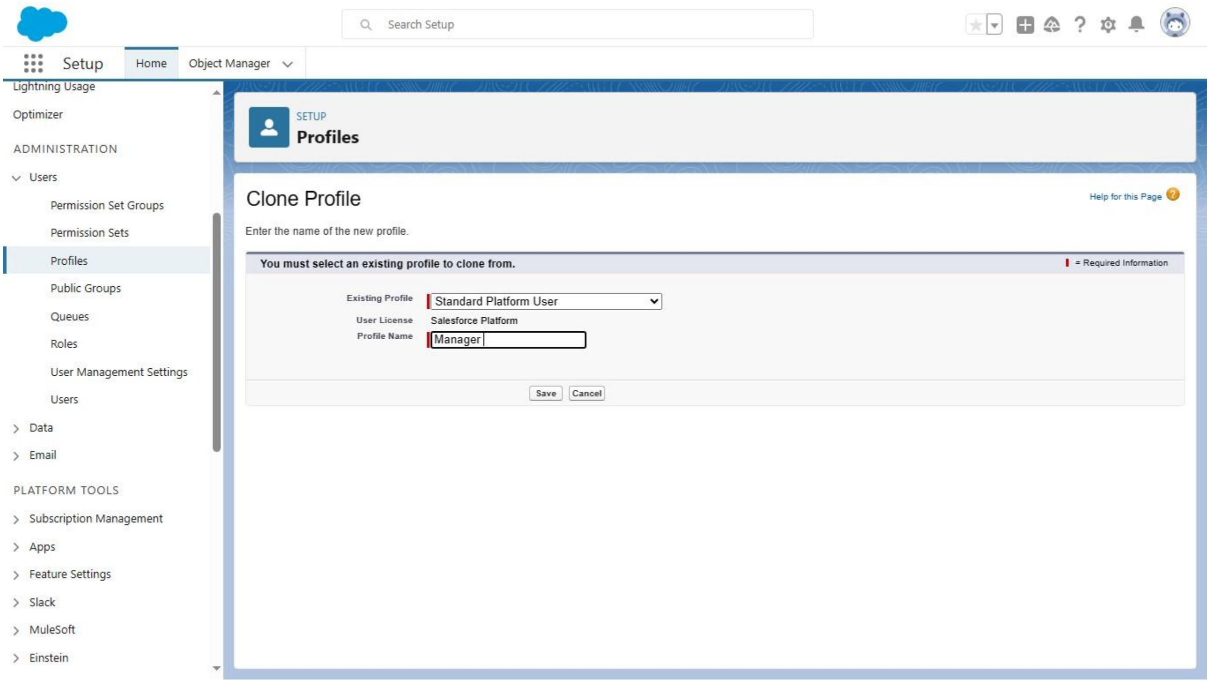
Search Setup
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MuleSoft
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Clone Profile
Help for this Page
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You must select an existing profile to clone from.
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Existing Profile
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User License
Salesforce Platform
Profile Name
Manager
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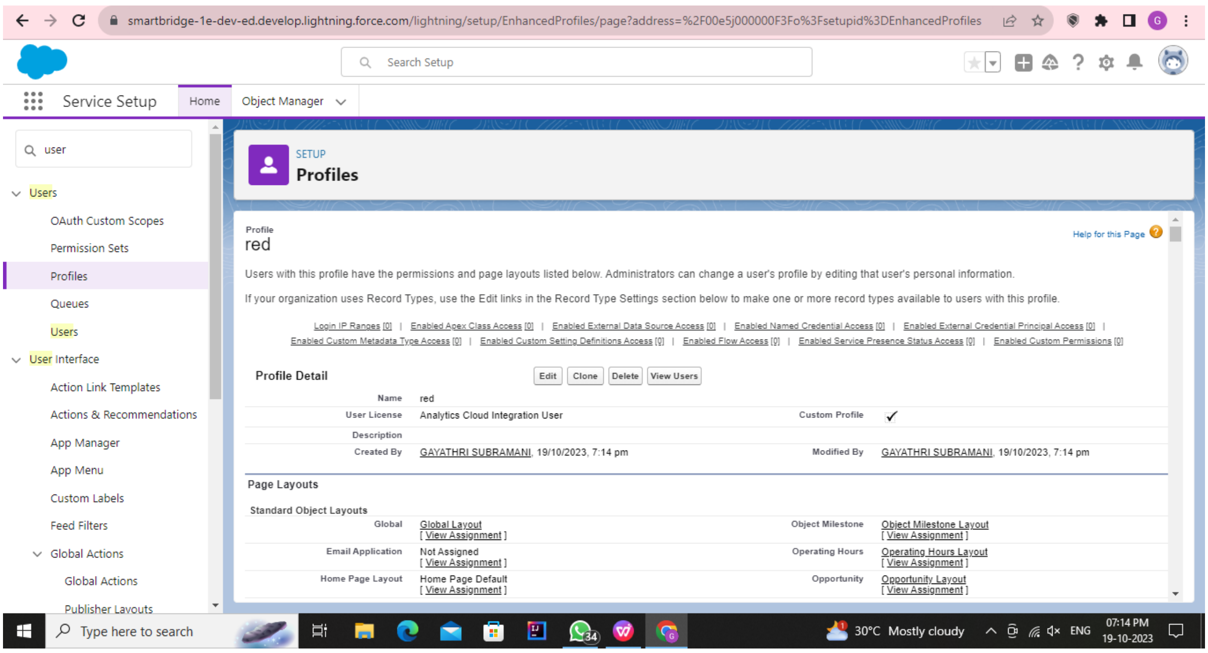
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Action Link Templates
Actions & Recommendations
App Manager
App Menu
Custom Labels
Feed Filters
Global Actions
Global Actions
Publisher Layouts
SETUP
Profiles
Profile
red
Help for this Page
Users with this profile have the permissions and page layouts 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]
Profile Detail
Edit
Clone
Delete
View Users
Name
red
User License
Analytics Cloud Integration User
Custom Profile
Description
Created By
GAYATHRI SUBRAMANI, 19/10/2023, 7:14 pm
Modified By
GAYATHRI SUBRAMANI, 19/10/2023, 7:14 pm
Page Layouts
Standard Object Layouts
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Global Layout
[View Assignment]
Object Milestone
Object Milestone Layout
[View Assignment]
Email Application
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Operating Hours
Operating Hours Layout
[View Assignment]
Home Page Layout
Home Page Default
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Opportunity
Opportunity Layout
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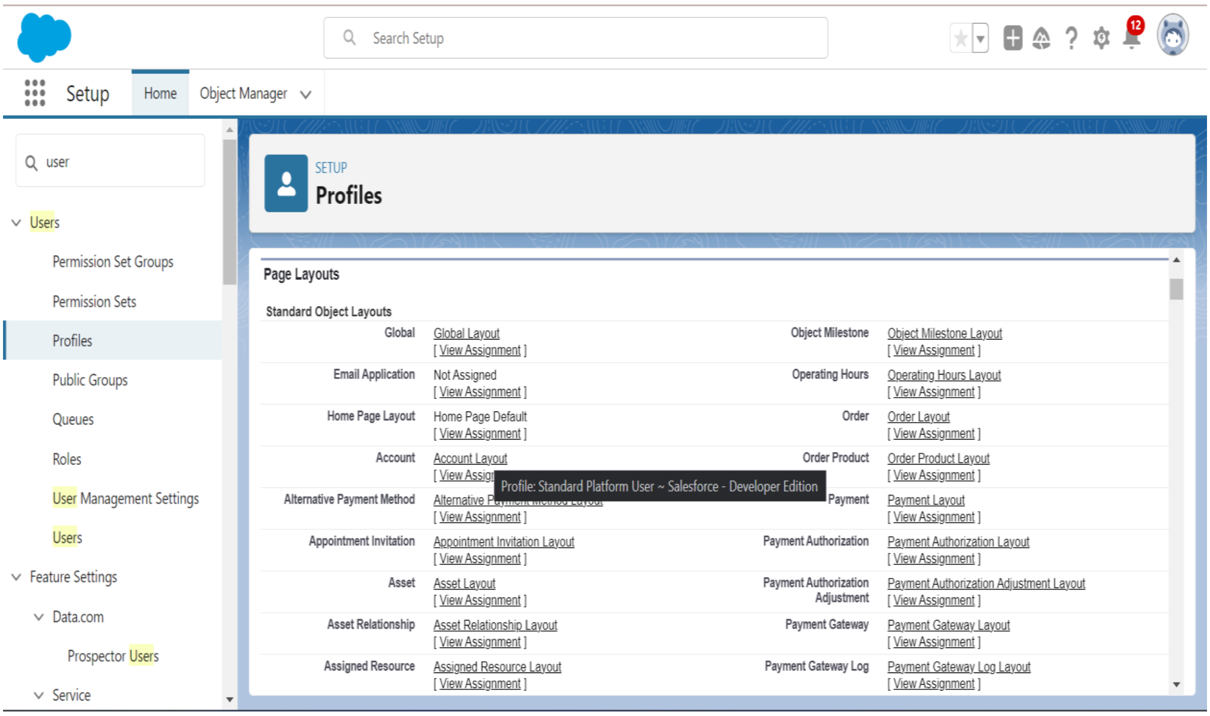

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Home Page Layout
Home Page Default
[View Assignment]
Account
Account Layout
Profile: Standard Platform User ~ Salesforce - Developer Edition
Alternative Payment Method
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Appointment Invitation
Appointment Invitation Layout
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Asset Layout
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Object Milestone
Object Milestone Layout
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Operating Hours
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Order Product Layout
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Payment Authorization
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Payment Gateway
Payment Gateway Layout
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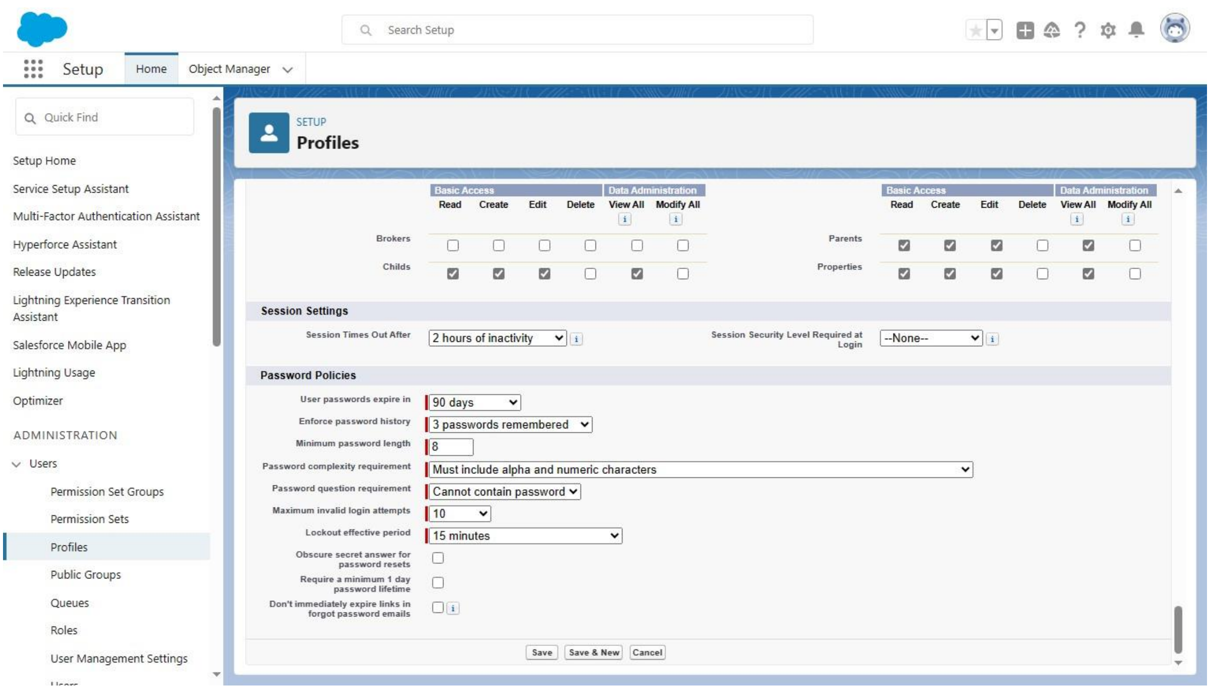
Payment Gateway Log
Payment Gateway Log Layout
[View Assignment]



Search Setup
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Hyperforce Assistant
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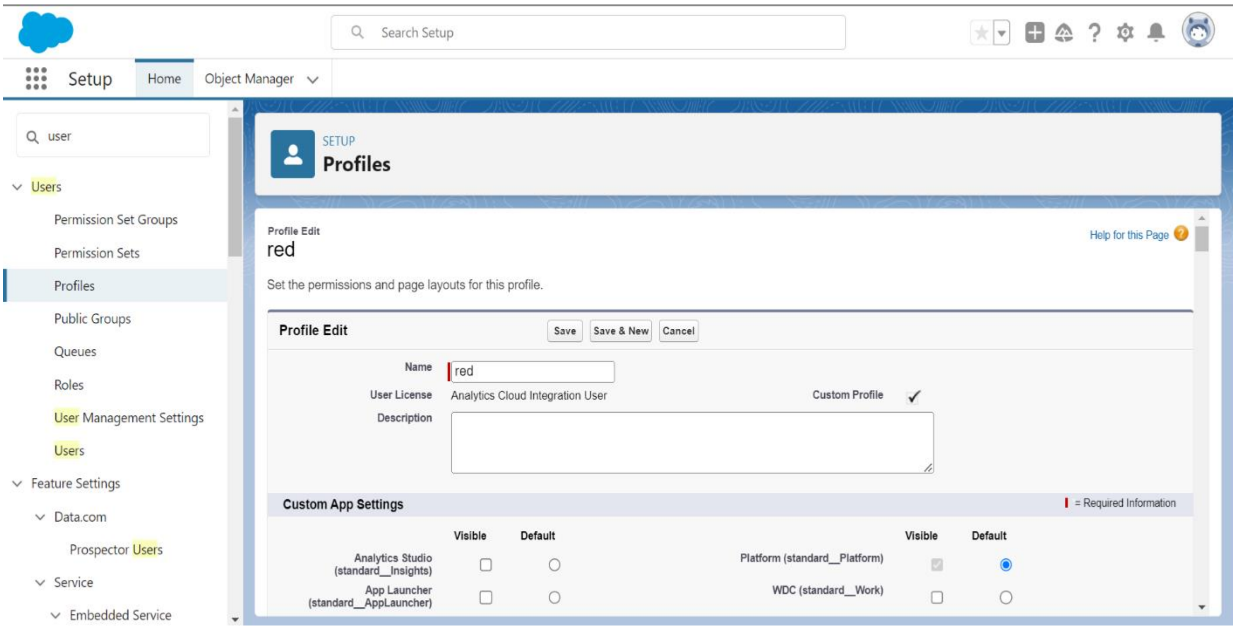
Edit
Delete
View All
Modify All
Brokers
Childs
Parents
Properties
Session Settings
Session Times Out After
2 hours of inactivity
Session Security Level Required at Login
--None--
Password Policies
User passwords expire in
90 days
Enforce password history
3 passwords remembered
Minimum password length
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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Permission Sets
Profiles
Public Groups
Queues
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User Management Settings
Users
Feature Settings
Data.com
Prospector Users
Service
Embedded Service
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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
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Analytics Studio (standard__Insights)
App Launcher (standard__AppLauncher)
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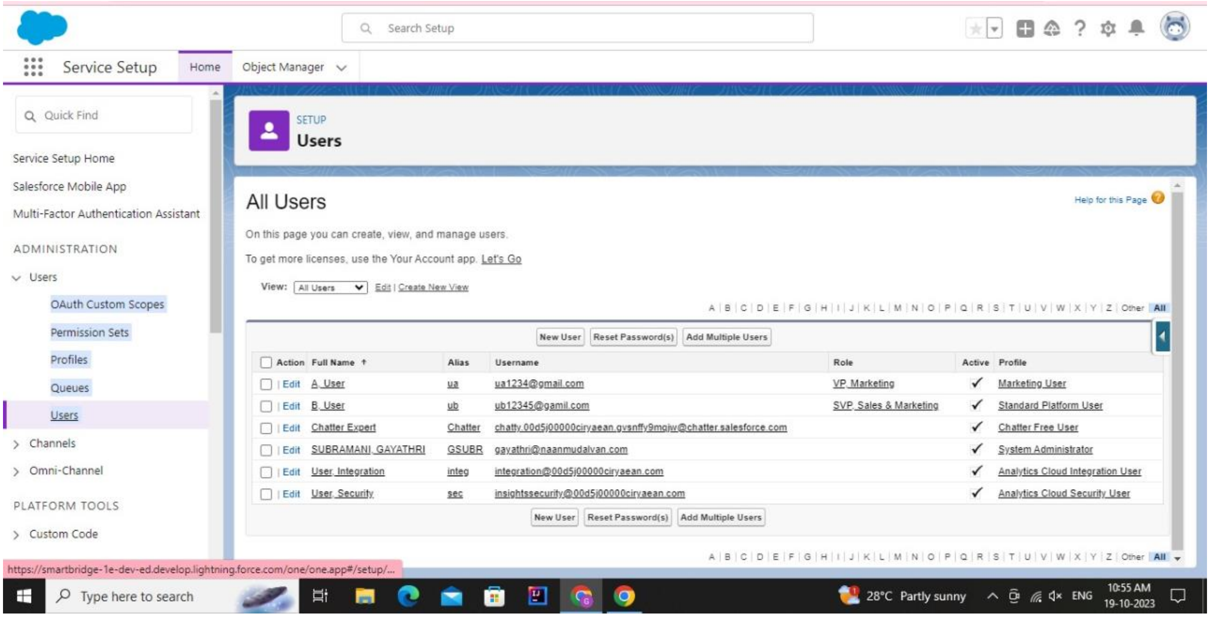
Platform (standard__Platform)
WDC (standard__Work)


Search Setup
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Quick Find
Service Setup Home
Salesforce Mobile App
Multi-Factor Authentication Assistant
ADMINISTRATION
Users
OAuth Custom Scopes
Permission Sets
Profiles
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Users
Channels
Omni-Channel
PLATFORM TOOLS
Custom Code
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 ua1234@gmail.com VP, Marketing Marketing User
Edit B, User ub ub12345@gamil.com SVP, Sales & Marketing Standard Platform User
Edit Chatter Expert Chatter chatty.00d5j00000ciryaean.gvsnffy9mojw@chatter.salesforce.com Chatter Free User
Edit SUBRAMANI, GAYATHRI GSUBR gayathri@naanmudalvan.com System Administrator
Edit User, Integration integ integration@00d5j00000ciryaean.com Analytics Cloud Integration User
Edit User, Security sec insightssecurity@00d5j00000ciryaean.com Analytics Cloud Security User
https://smartbridge-1e-dev-ed.develop.lightning.force.com/one/one.app#/setup/...
Type here to search
28°C Partly sunny
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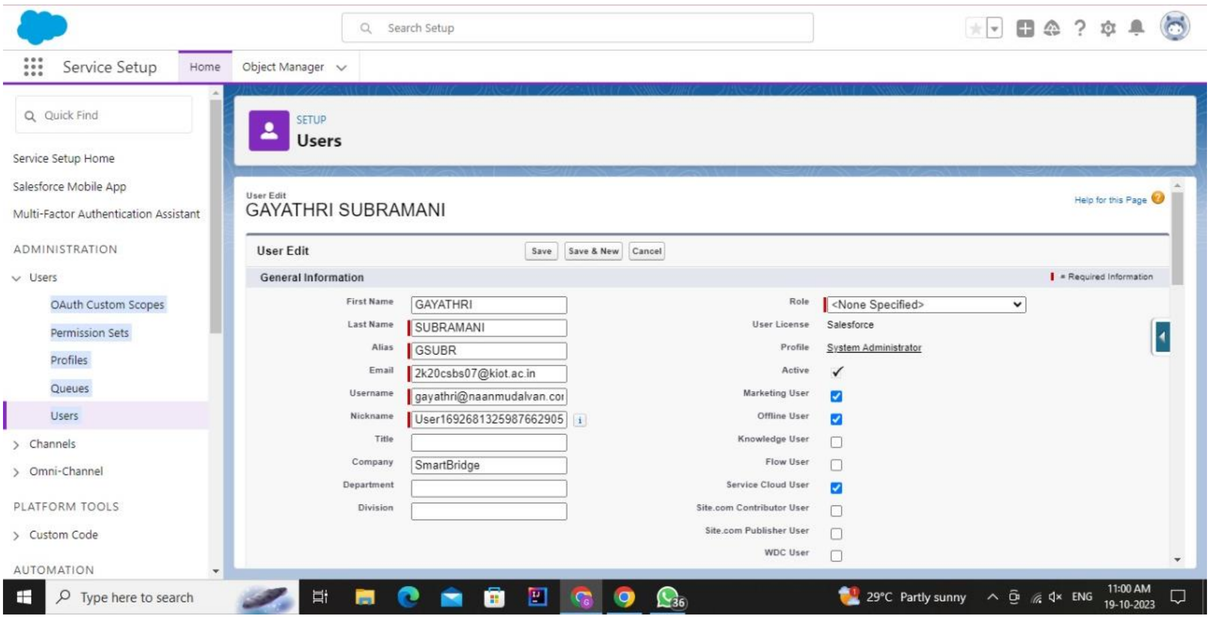
19-10-2023


Search Setup
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Object Manager
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Service Setup Home
Salesforce Mobile App
Multi-Factor Authentication Assistant
ADMINISTRATION
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OAuth Custom Scopes
Permission Sets
Profiles
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Custom Code
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SETUP
Users
User Edit
GAYATHRI SUBRAMANI
Help for this Page
User Edit
Save
Save & New
Cancel
General Information
= Required Information
First Name GAYATHRI
Last Name SUBRAMANI
Alias GSUBR
Email 2k20csbs07@kiot.ac.in
Username gayathri@naanmudalvan.coı
Nickname User1692681325987662905
Title
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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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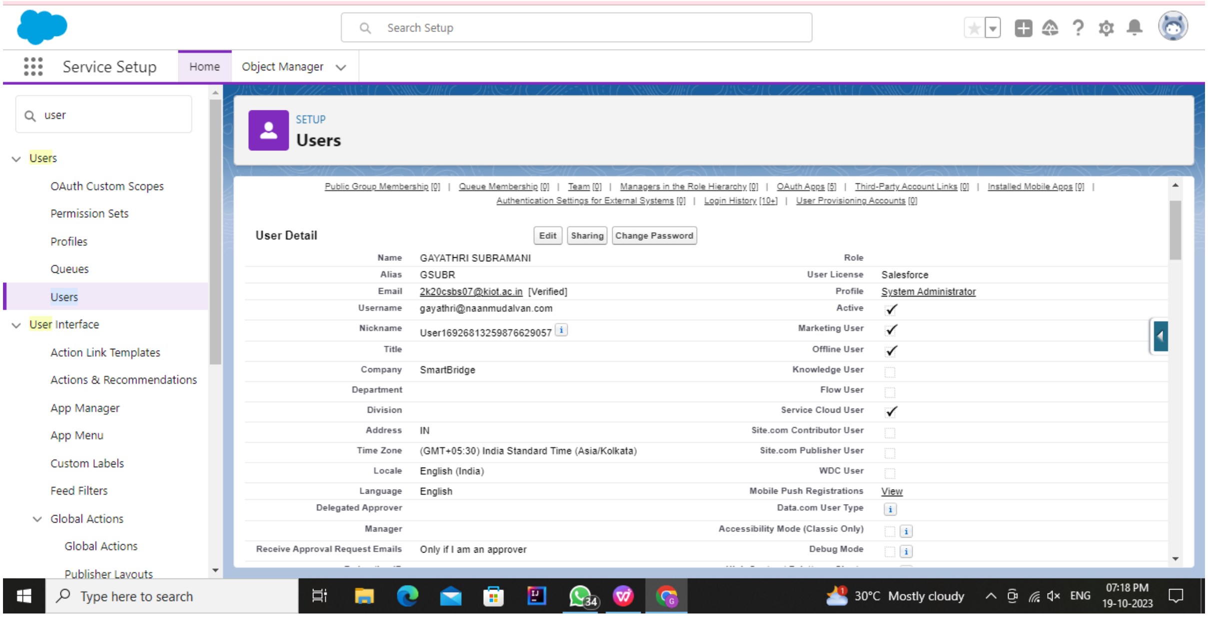
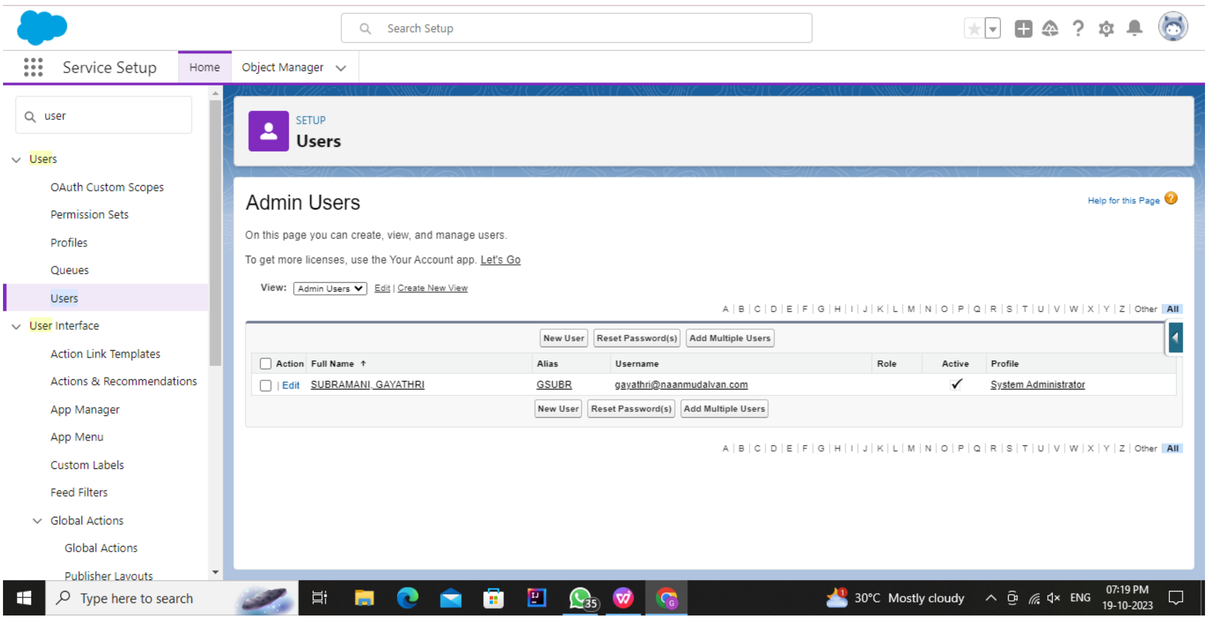
19-10-2023



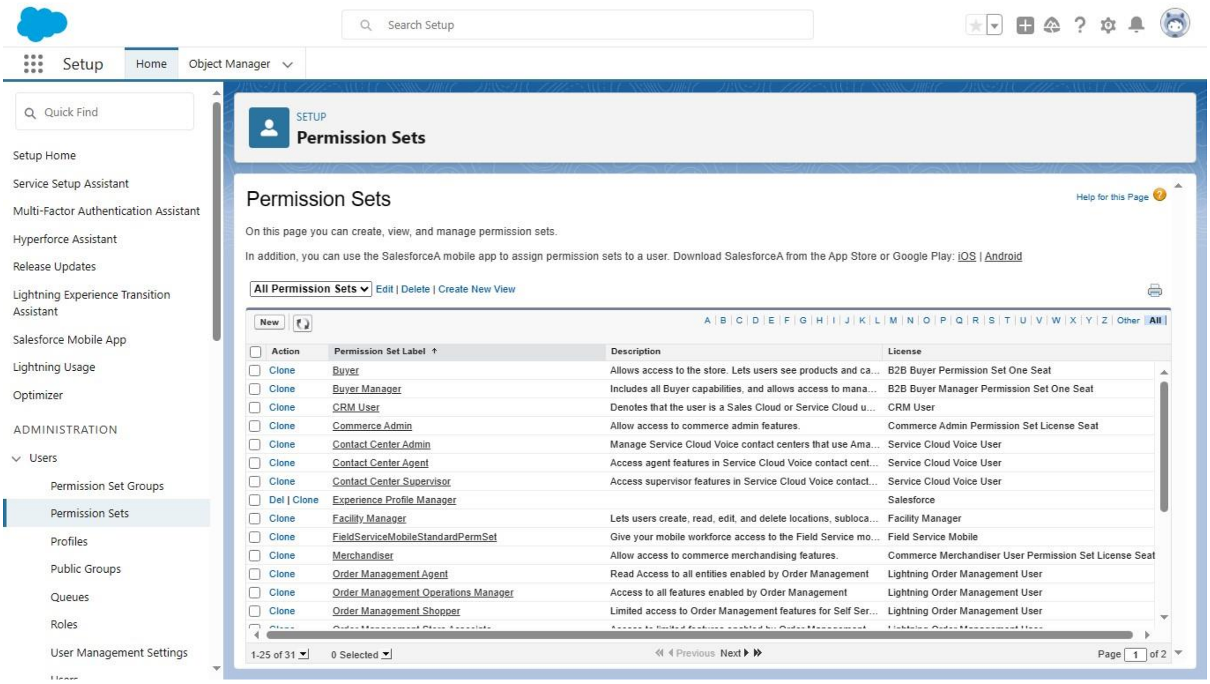


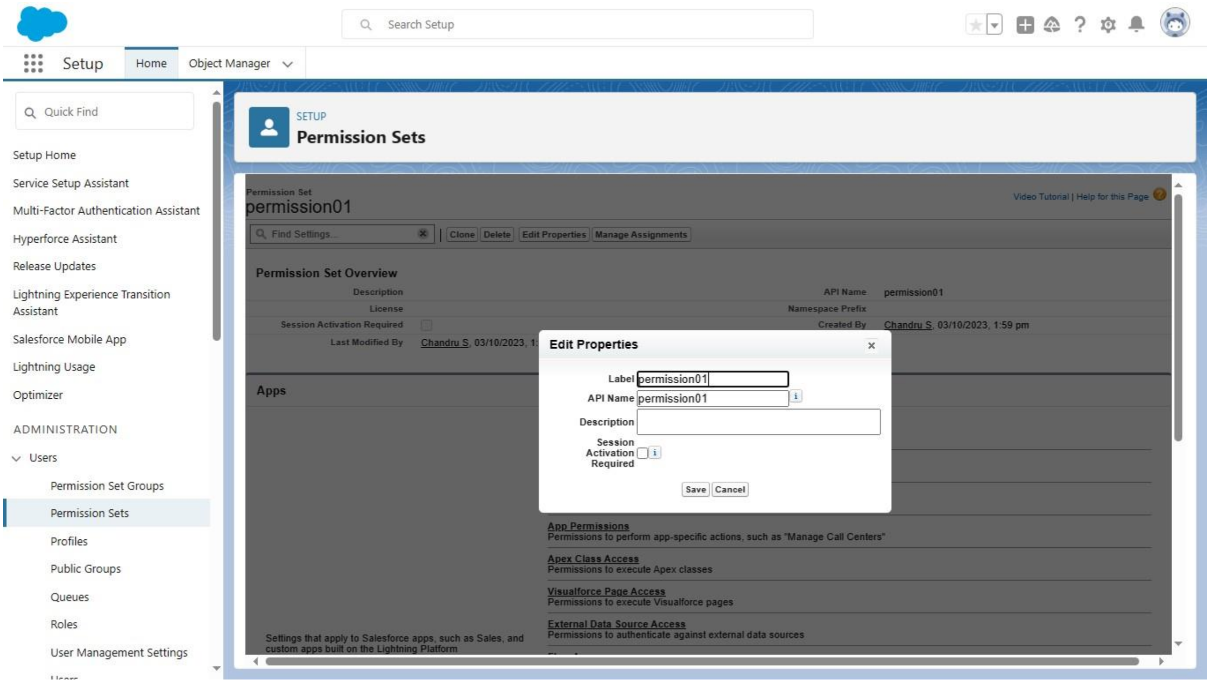
Step 2: Assign the Permission Set to the User Needing Delete Access

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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Hyperforce Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
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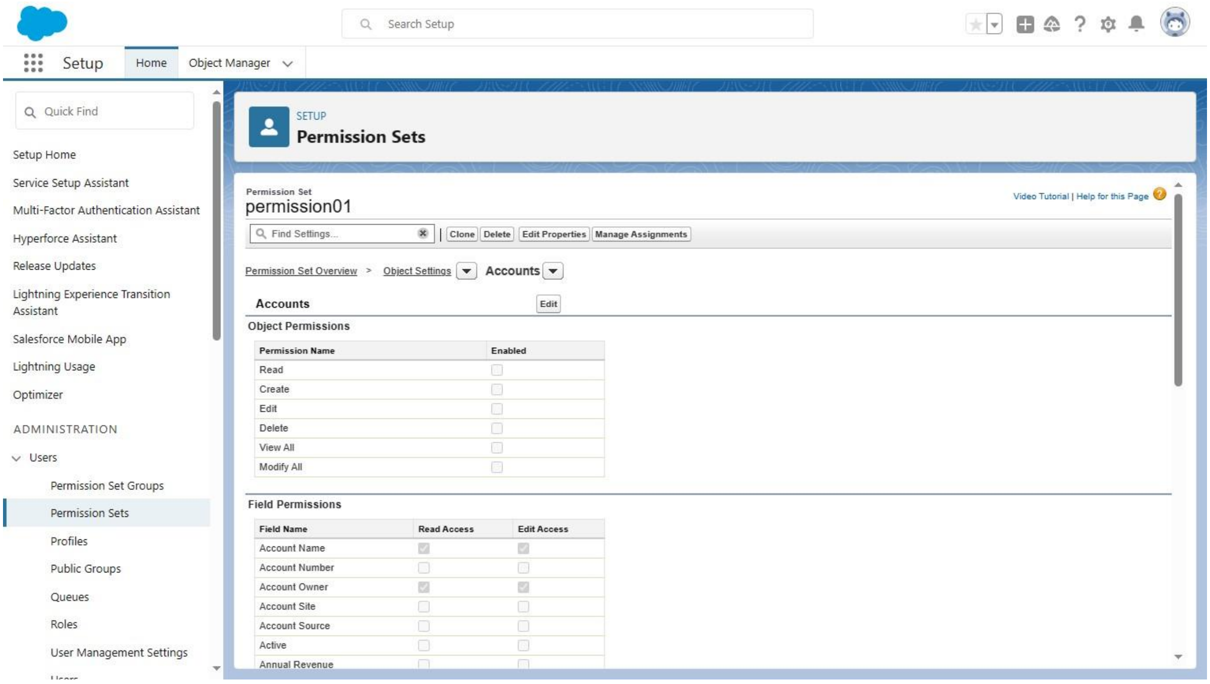
User Management Settings
SETUP
Permission Sets
Permission Set
permission01
Video Tutorial | Help for this Page
Find Settings...
Clone
Delete
Edit Properties
Manage Assignments
Permission Set Overview
Description
License
Session Activation Required
Last Modified By
API Name
permission01
Namespace Prefix
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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Edit Properties
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Permission Set Overview > Object Settings
Accounts
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Object Permissions
Permission Name
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Create
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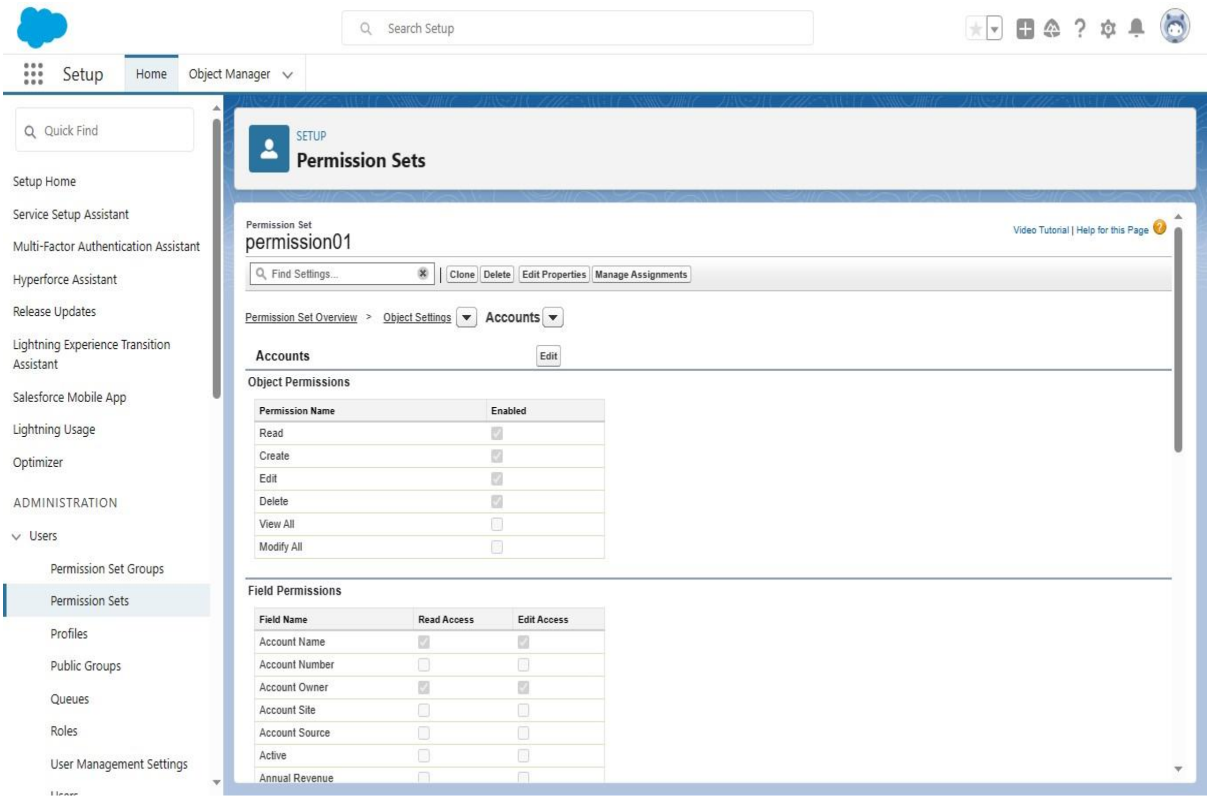
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Permission Set Overview > Object Settings
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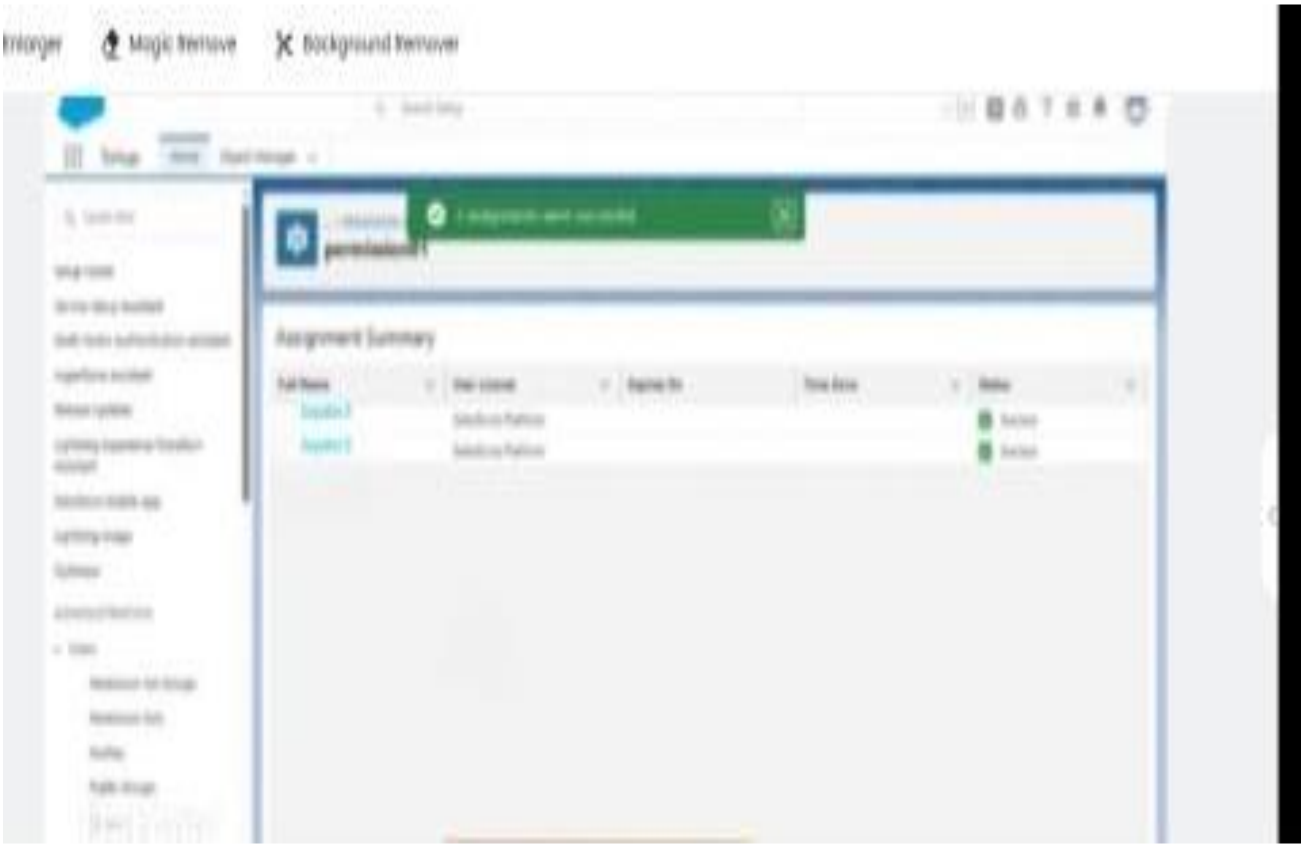
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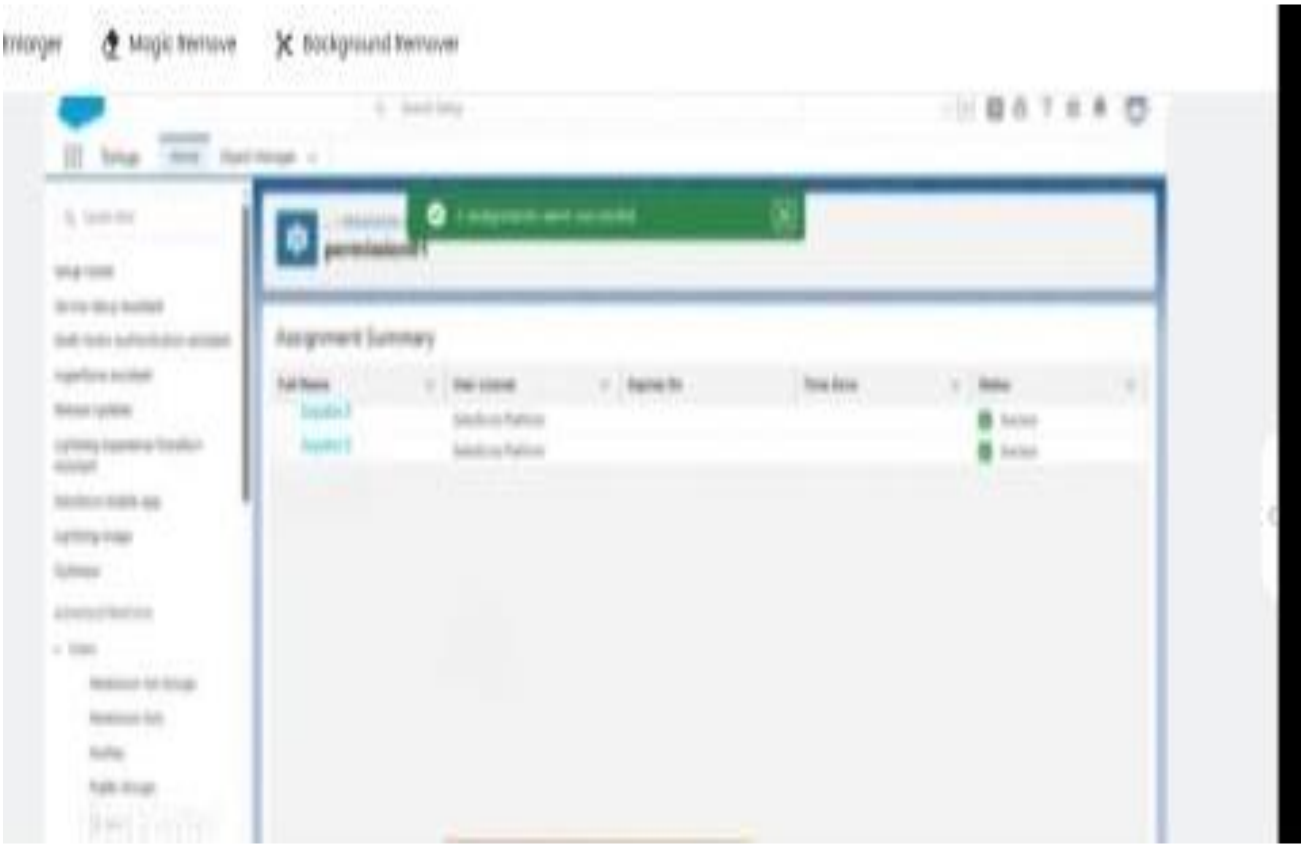
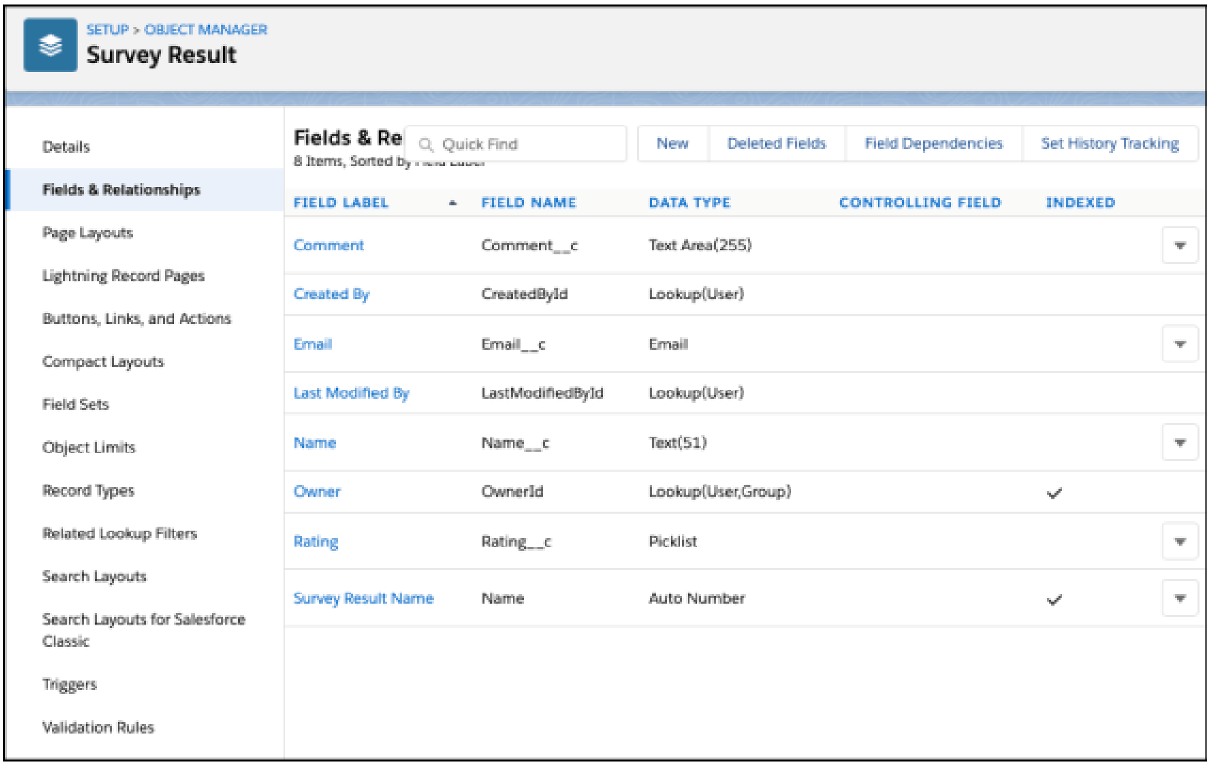


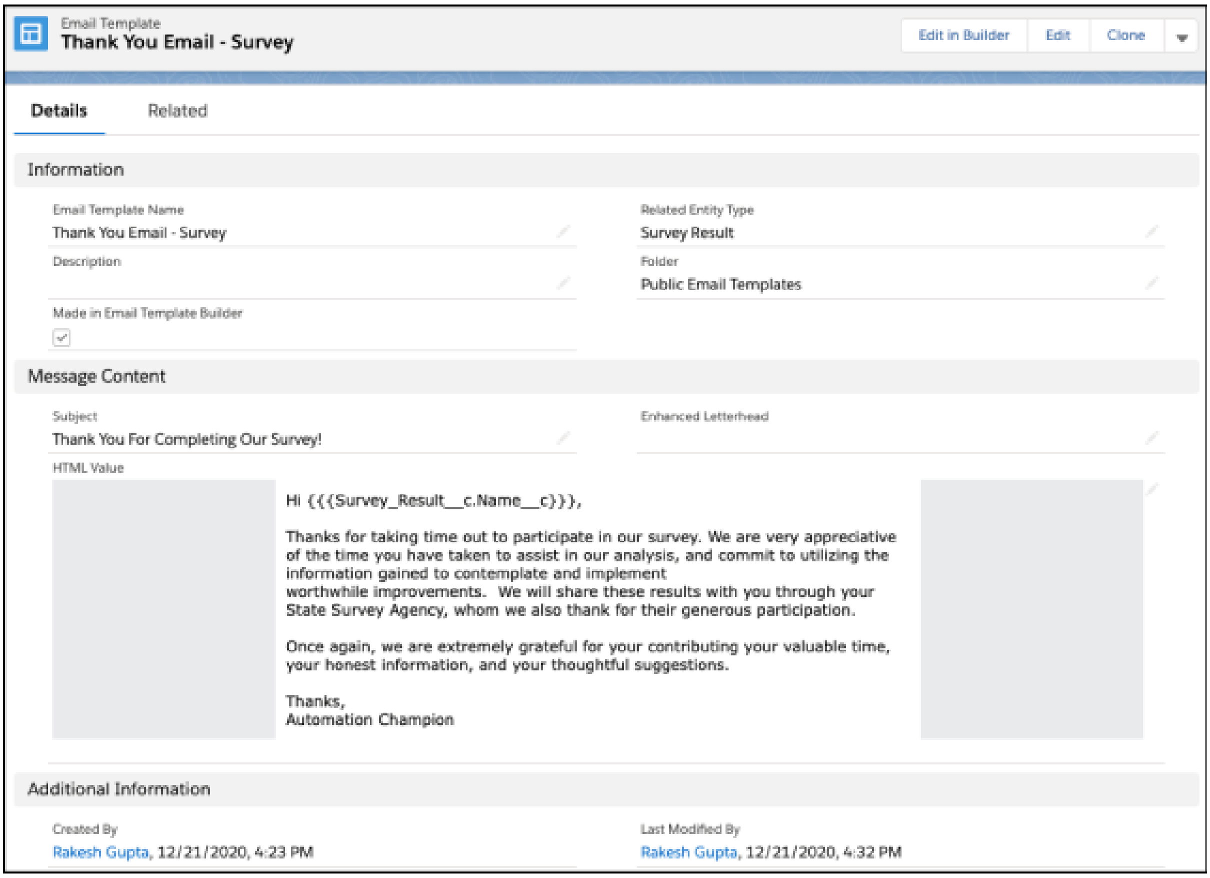
4.Create a screen flow for a basic survey to fill in the details for any form.

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.

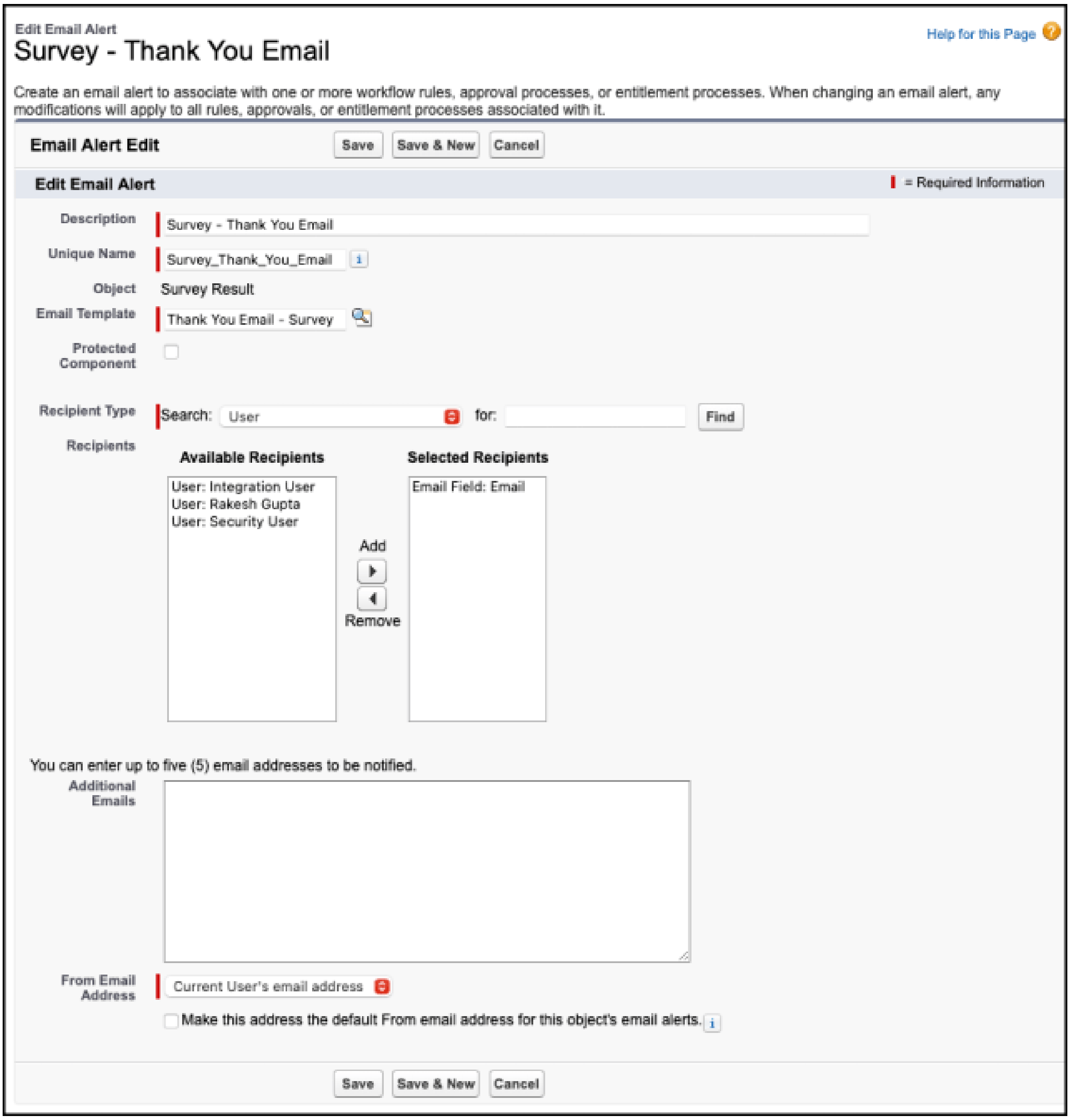
4.Name the Email Alert and click the Tab button. The Unique Name will populate.

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

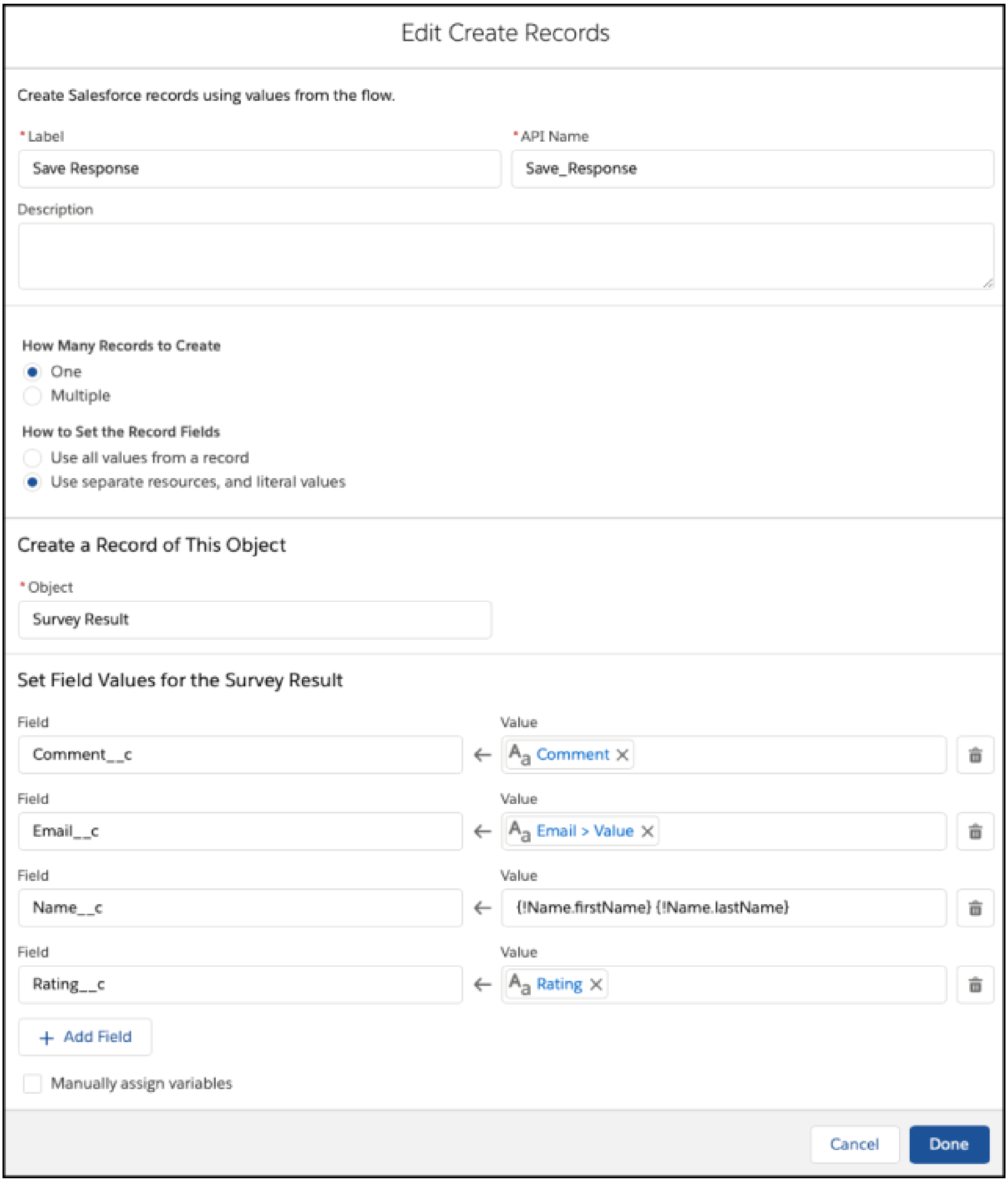
Row 1:
Field: Comment__c
Value: {!Comment}
Click Add Row

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}

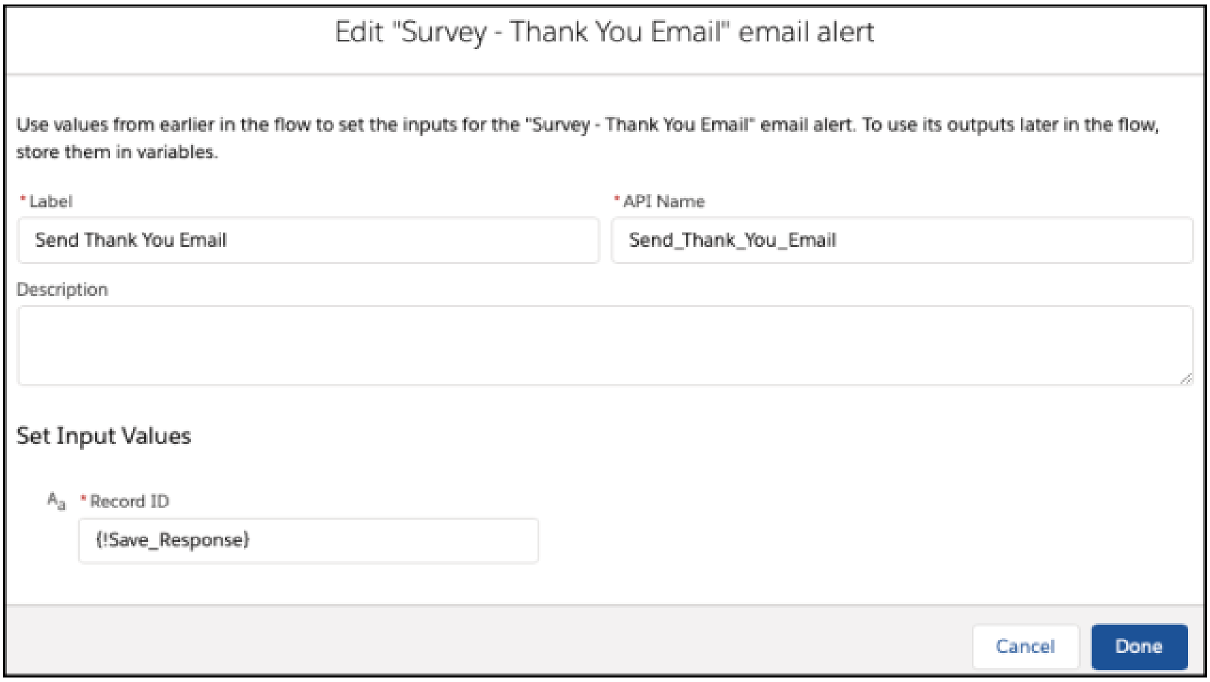
7.Click Done.

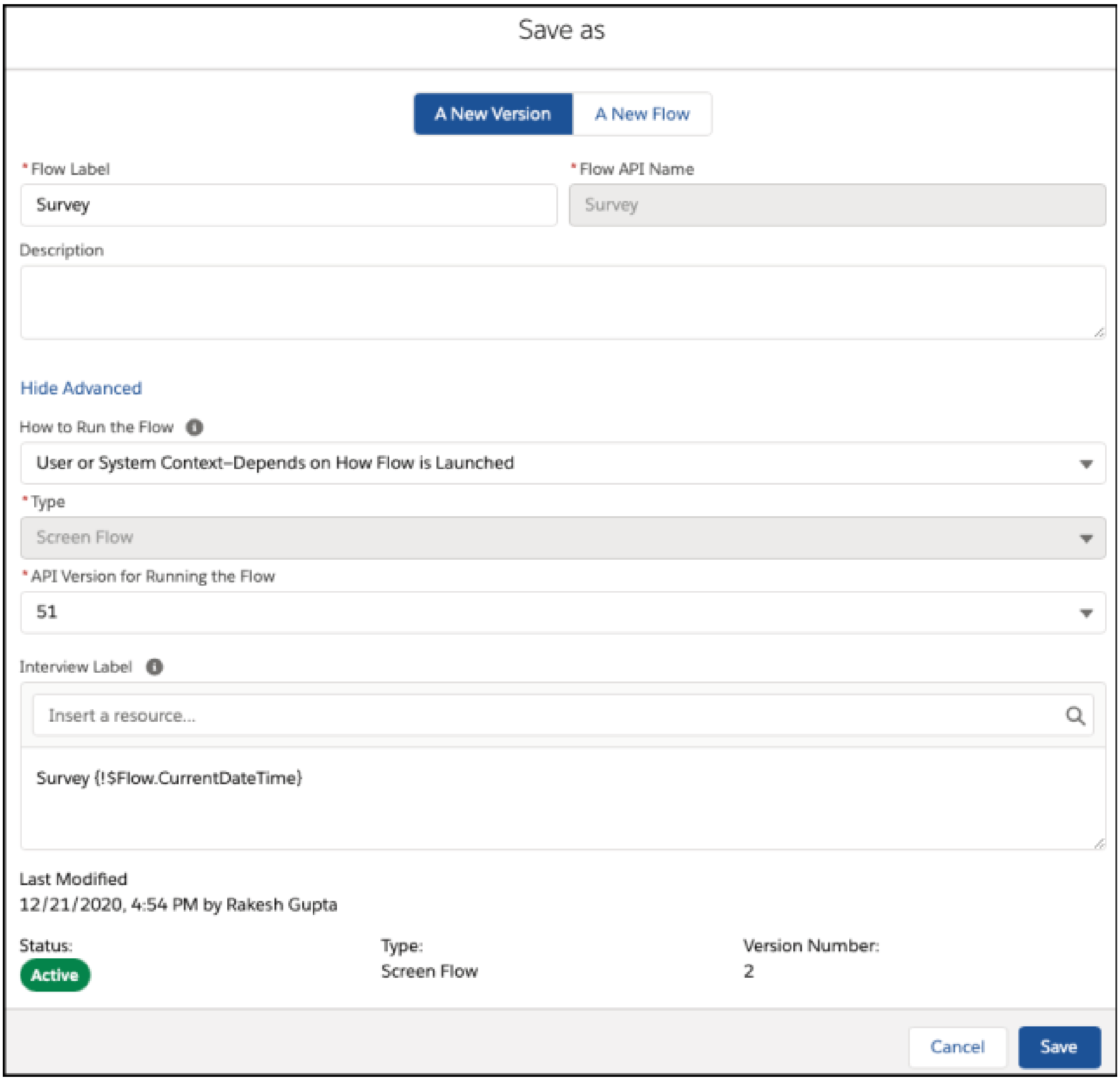


Step 4.3: Salesforce Flow – Call an Acton – Email Alert to Send Out Thank You Email

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.



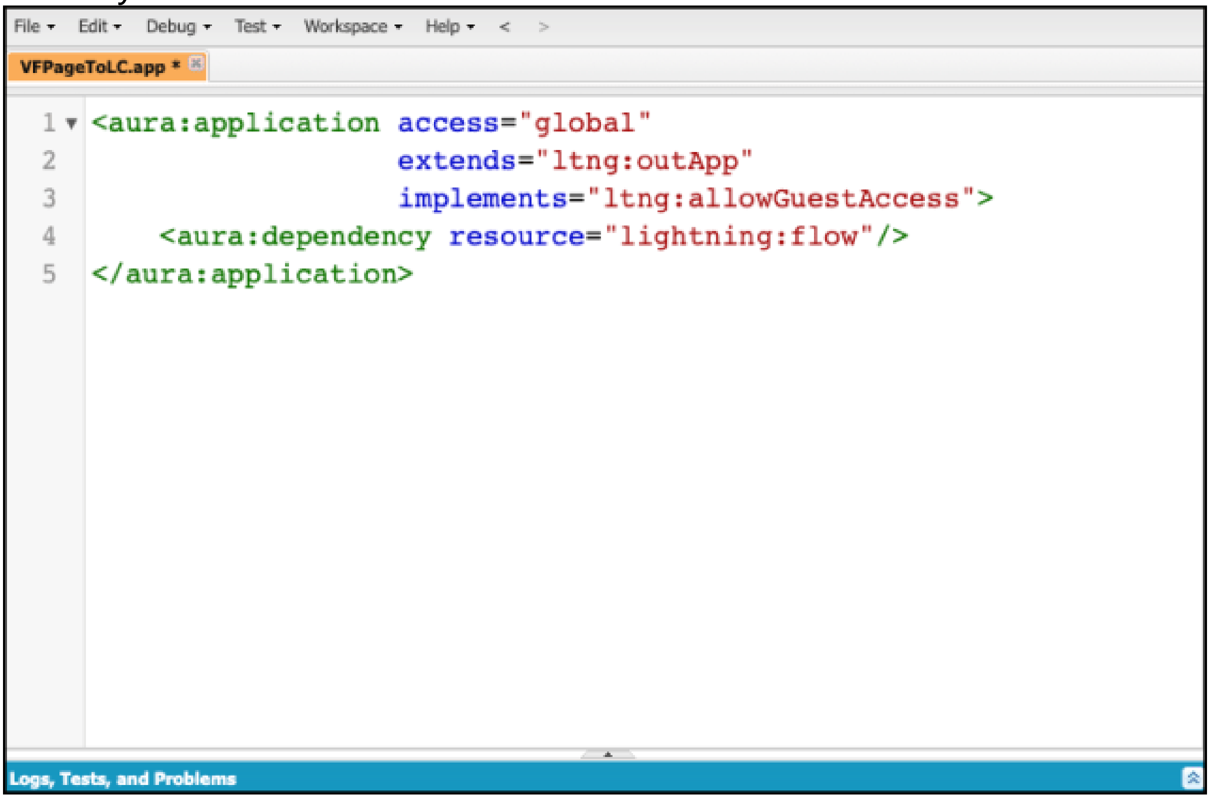


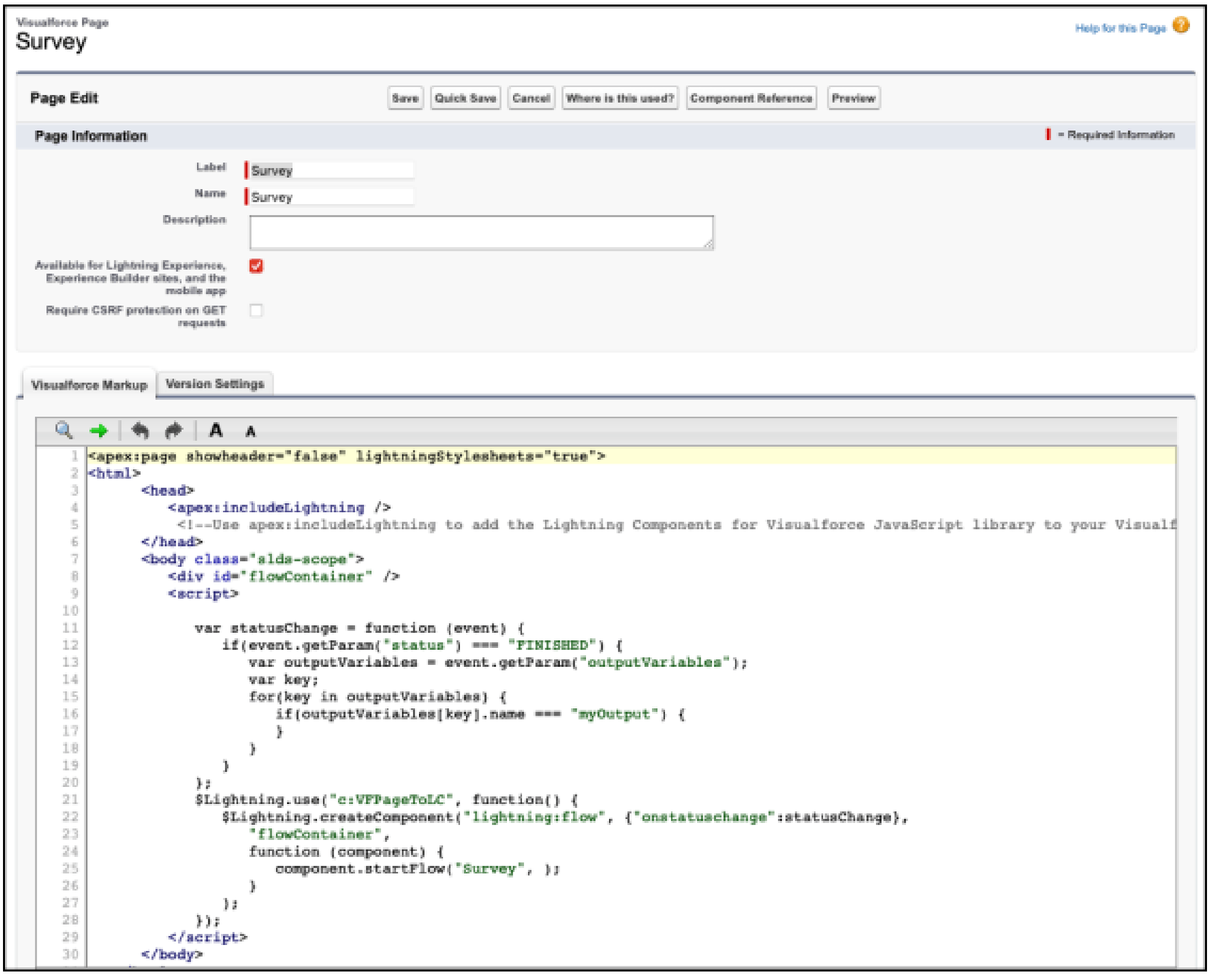
Step 5: Create a Lightning Application to Render Lightning Runtime for Flow in a Visualforce Page

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.





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.

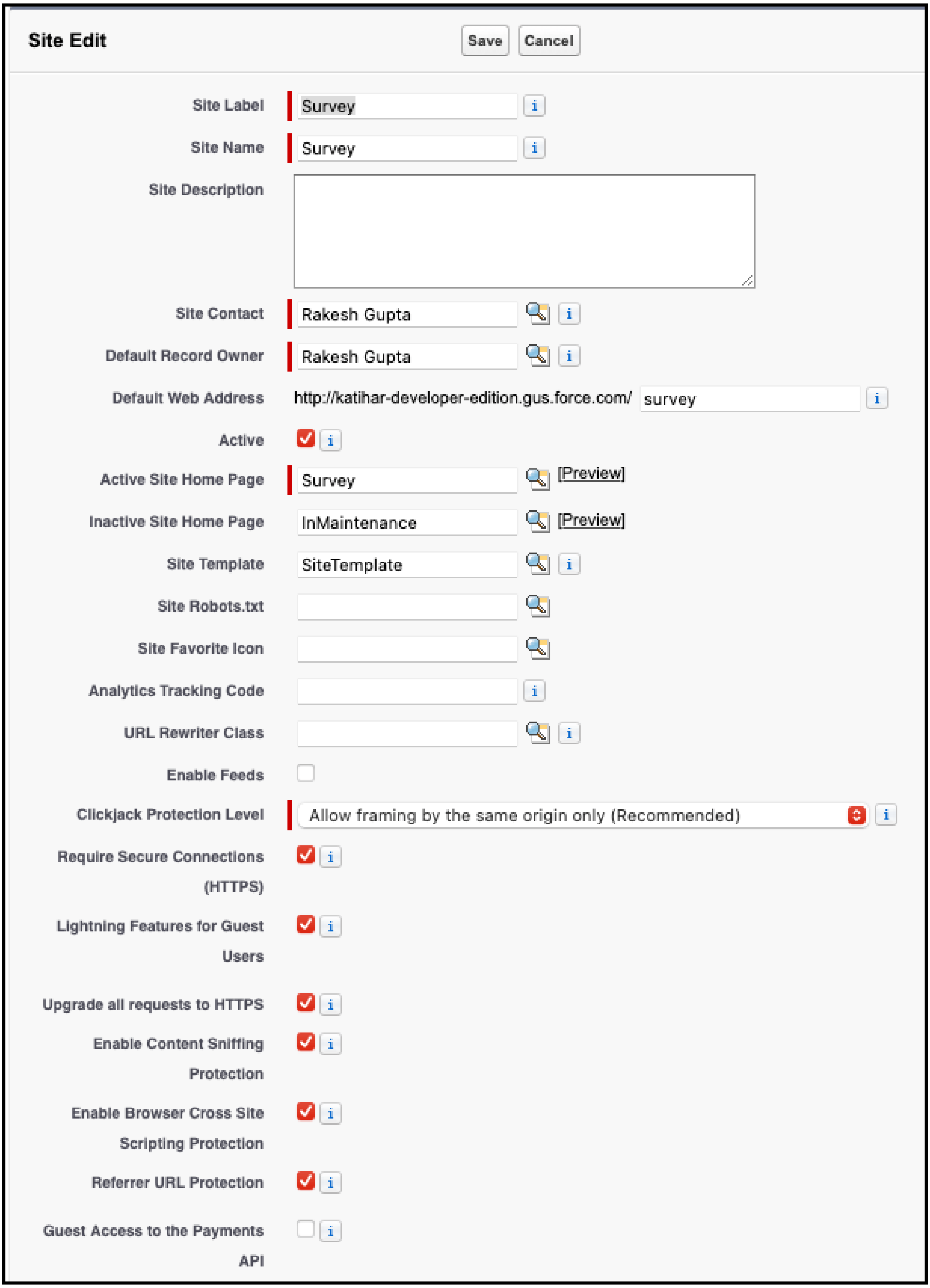
1.Click Setup.

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.


Site Edit
Save
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Site Label
Survey
Site Name
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Site Description
Site Contact
Rakesh Gupta
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Default Web Address
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Survey
[Preview]
Inactive Site Home Page
InMaintenance
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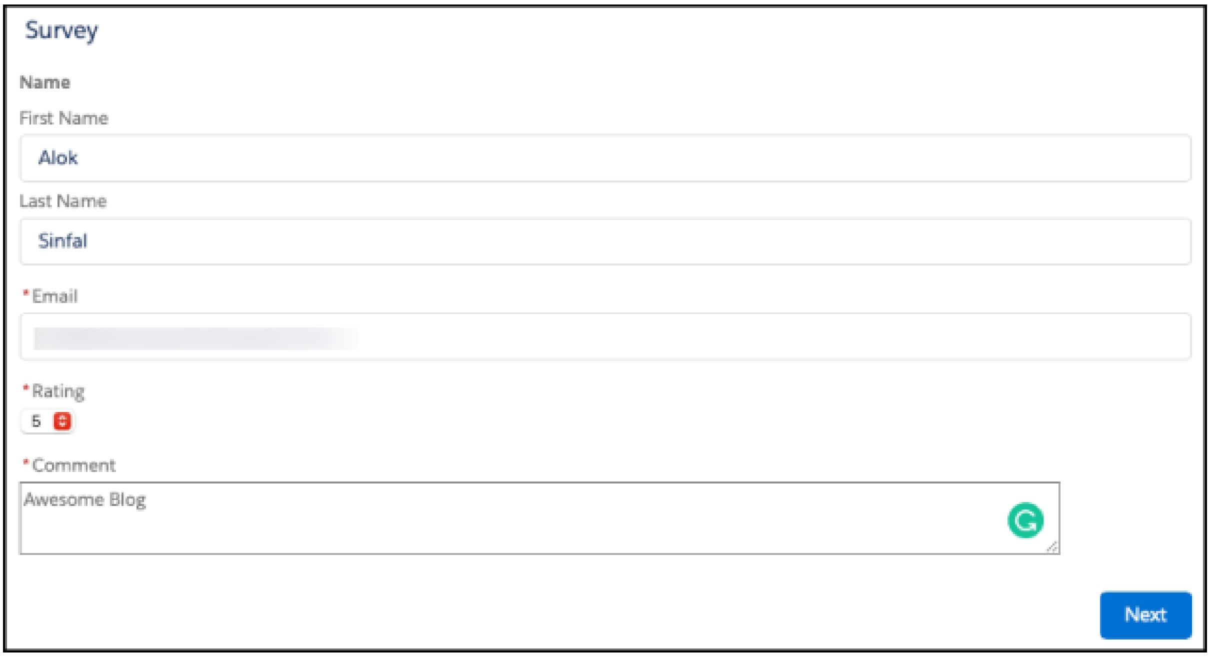
Site Template
SiteTemplate
Site Robots.txt
Site Favorite Icon
Analytics Tracking Code
URL Rewriter Class
Enable Feeds
Clickjack Protection Level
Allow framing by the same origin only (Recommended)
Require Secure Connections (HTTPS)
Lightning Features for Guest Users
Upgrade all requests to HTTPS
Enable Content Sniffing Protection
Enable Browser Cross Site Scripting Protection
Referrer URL Protection
Guest Access to the Payments API

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.