NAAN MUDHALVAN
Salesforce Developer
Assignment no 1

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Year: IV year

Dept: CSE

Batch : 2024

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

1. Log in to your Salesforce Developer account.

2. Go to Setup by clicking on your profile picture and selecting "Setup."

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

4. Click on "New Custom Object" to create both "Parent_ c" and "Child_ c."

Step 2: Create Fields

For the "Child __c," you'll need to create a Master-Detail relationship field that references the "Parent_c" and a Roll-Up Summary field to calculate the total number of related records.

Create the Master-Detail Relationship Field:

1. In "Setup," go to "Objects and Fields" > "Object Manager."

2. Click on "Childc" to edit it.

3. In the left sidebar, click on "Fields & Relationships."

4. Click "New" to create a new custom field.

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

6. Choose "Parent__c" as the related object.

7. Configure other settings and save the field.

Create the Roll-Up Summary Field:

1. In the "Fields & Relationships" section for "Parent_c," click "New" again.

2. Choose the "Roll-Up Summary" data type.

3. Configure the field to count the number of related "Child_c" records.

4. Save the Roll-Up Summary field.

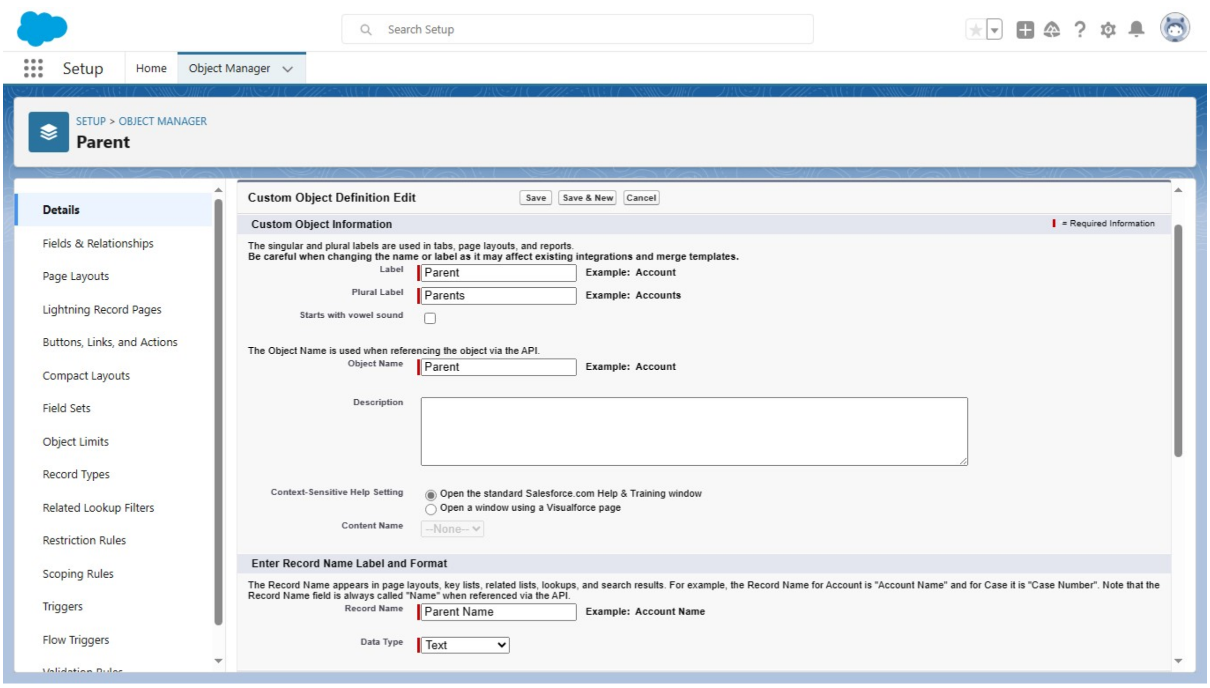
Step 3: Create Records

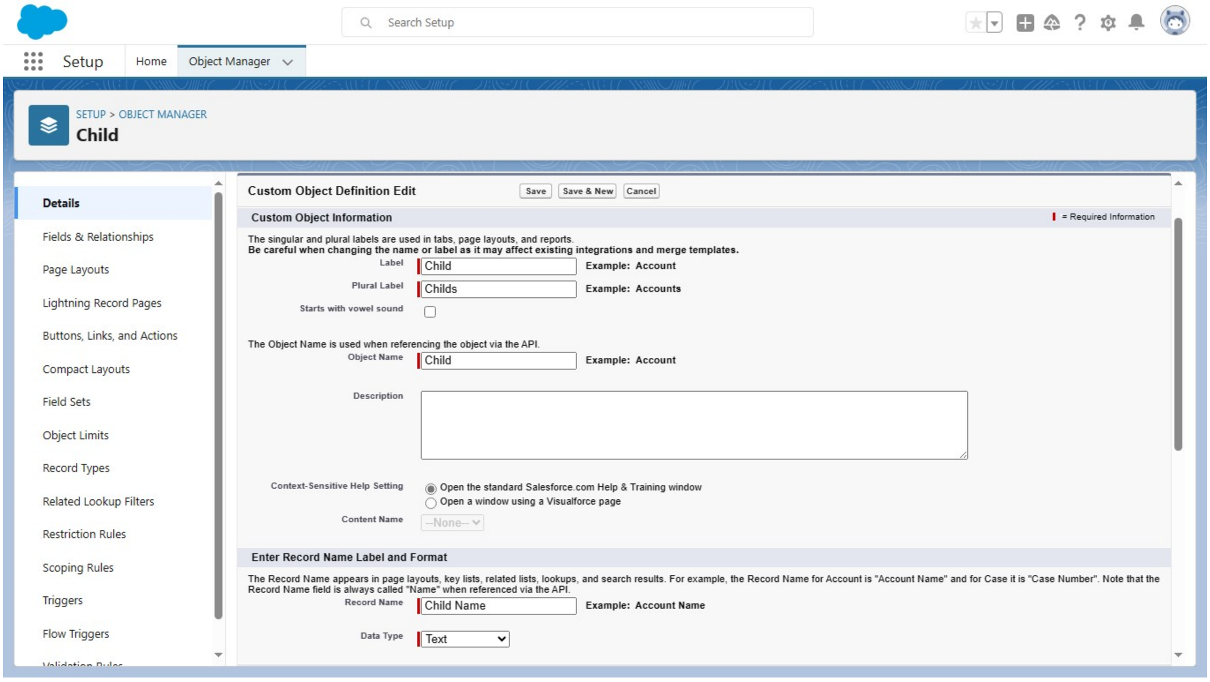
Now, you can create records for both custom objects and establish relationships between them. For example, create several "Parent_c" records and associate multiple "Child_c" records to each parent record.

Step 4: View the Roll-Up Summary Field

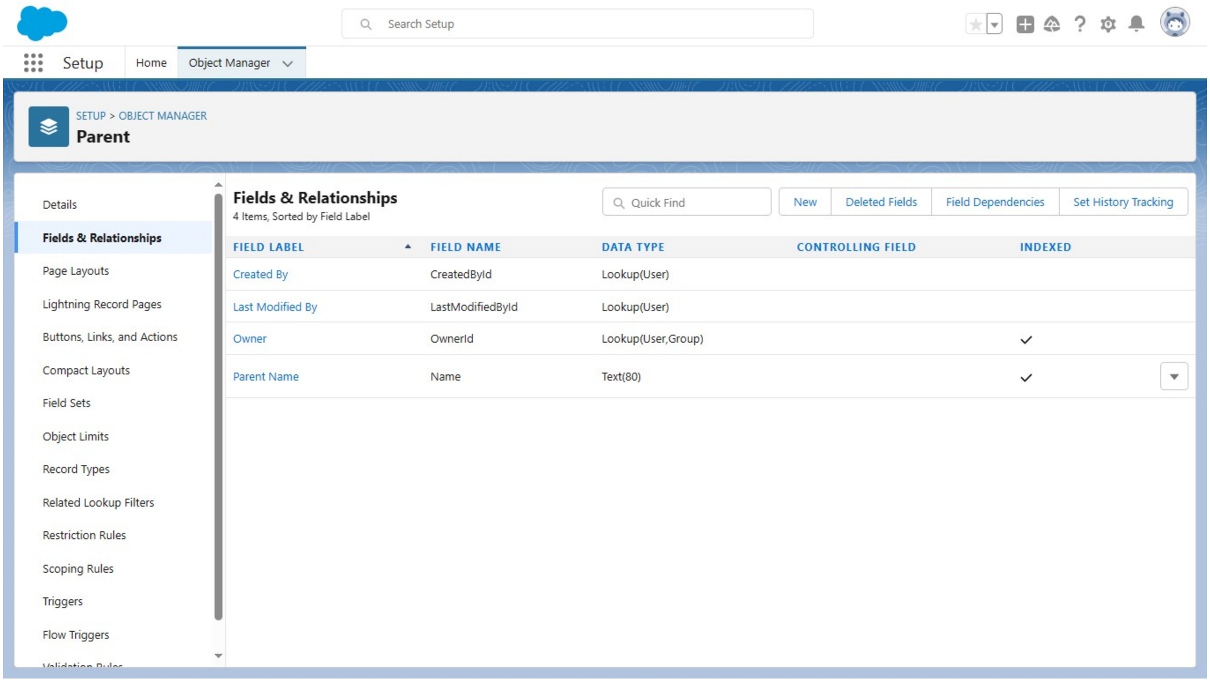
Once you have created records and established relationships, you can view the Roll-Up Summary field on the "Parent_c" record detail page. It will display the total number of related "Child_c" records for that particular parent record.

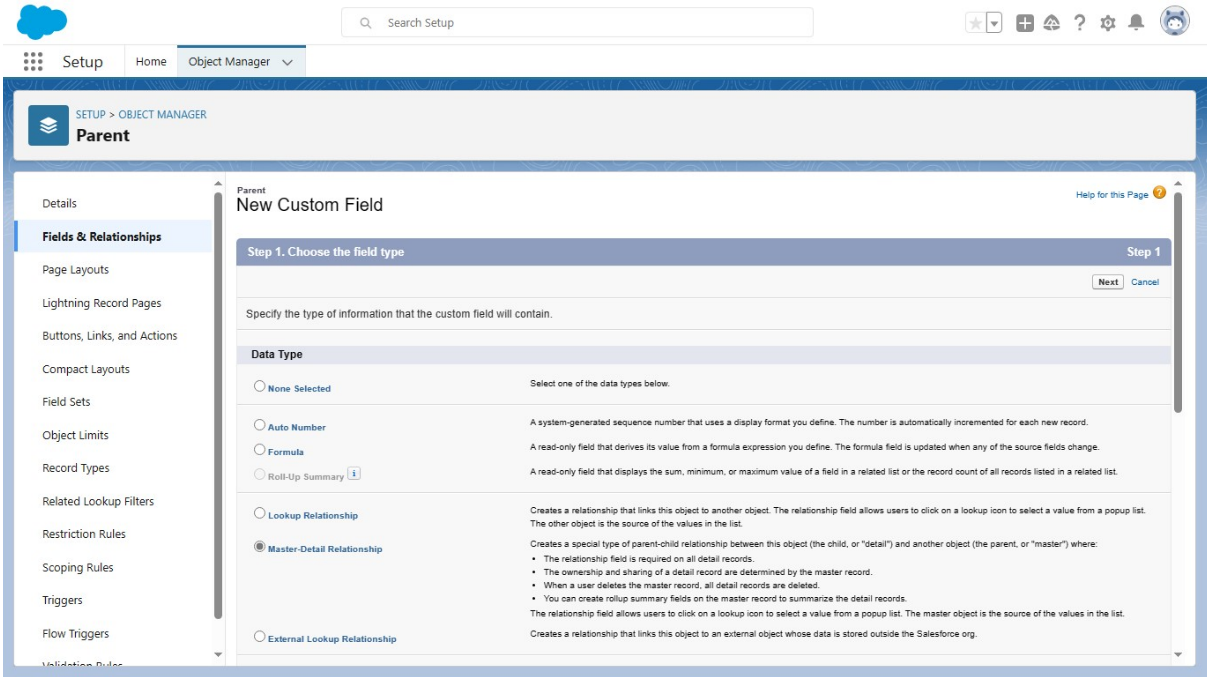
Step 1: Create Custom Objects





Step 2: Create a Master-Detail Relationship

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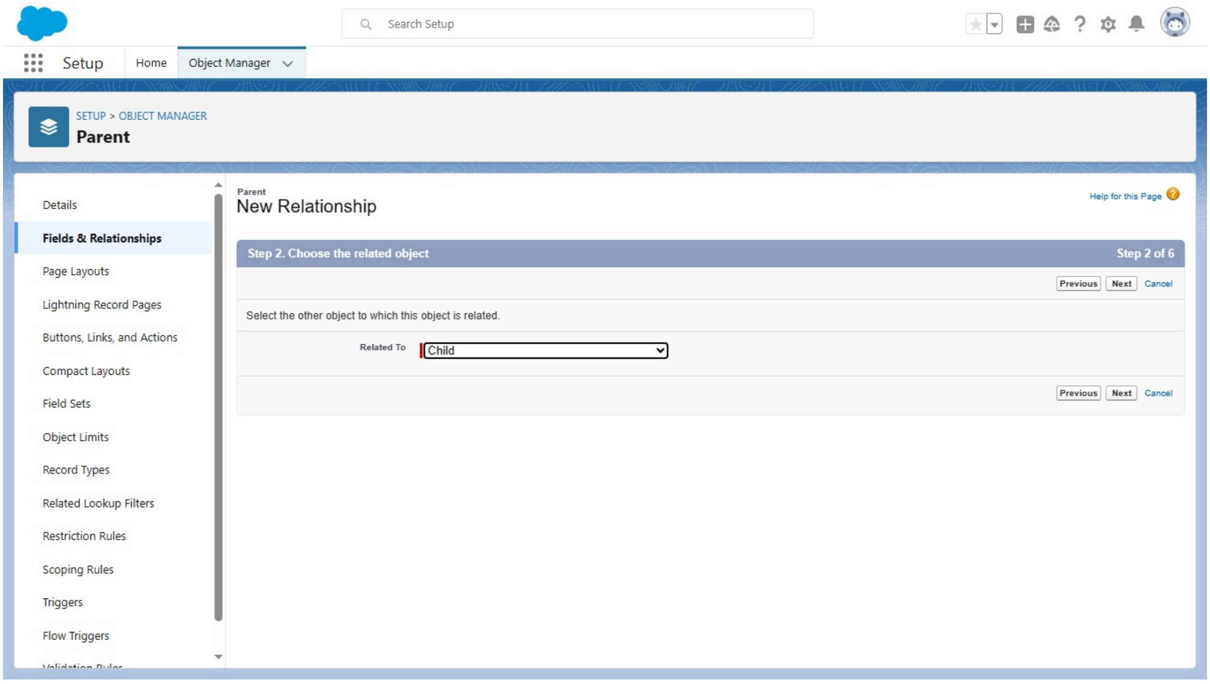
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Triggers
Flow Triggers
Parent
New Custom Field
Help for this Page
Step 1. Choose the field type
Step 1
Next
Cancel
Specify the type of information that the custom field will contain.
Data Type
None Selected
Select one of 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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Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Triggers
Flow Triggers
Parent
New Relationship
Help for this Page
Step 2. Choose the related object
Step 2 of 6
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Cancel
Select the other object to which this object is related.
Related To
Child
Previous
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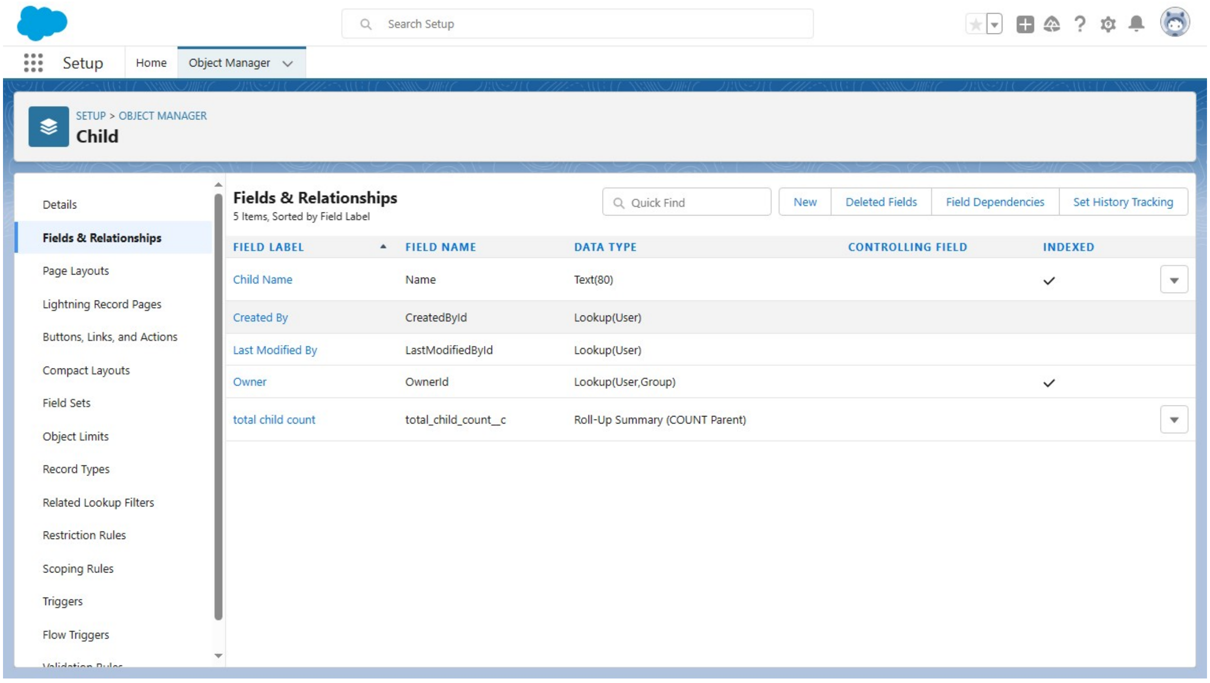
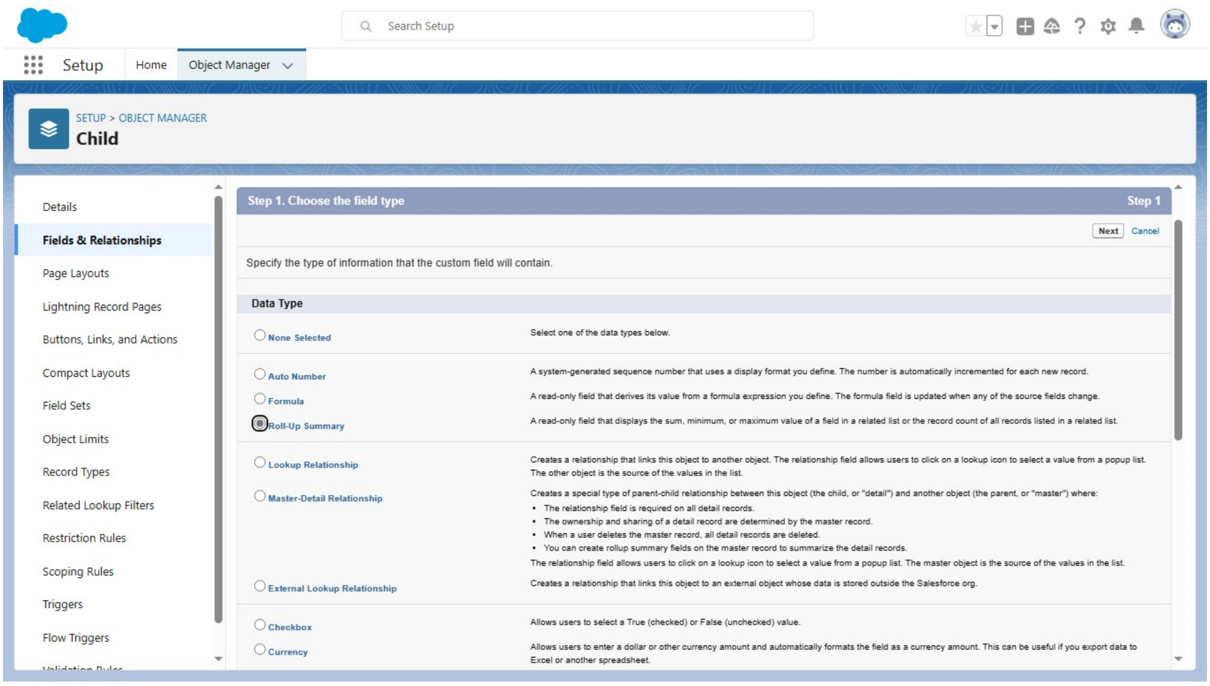
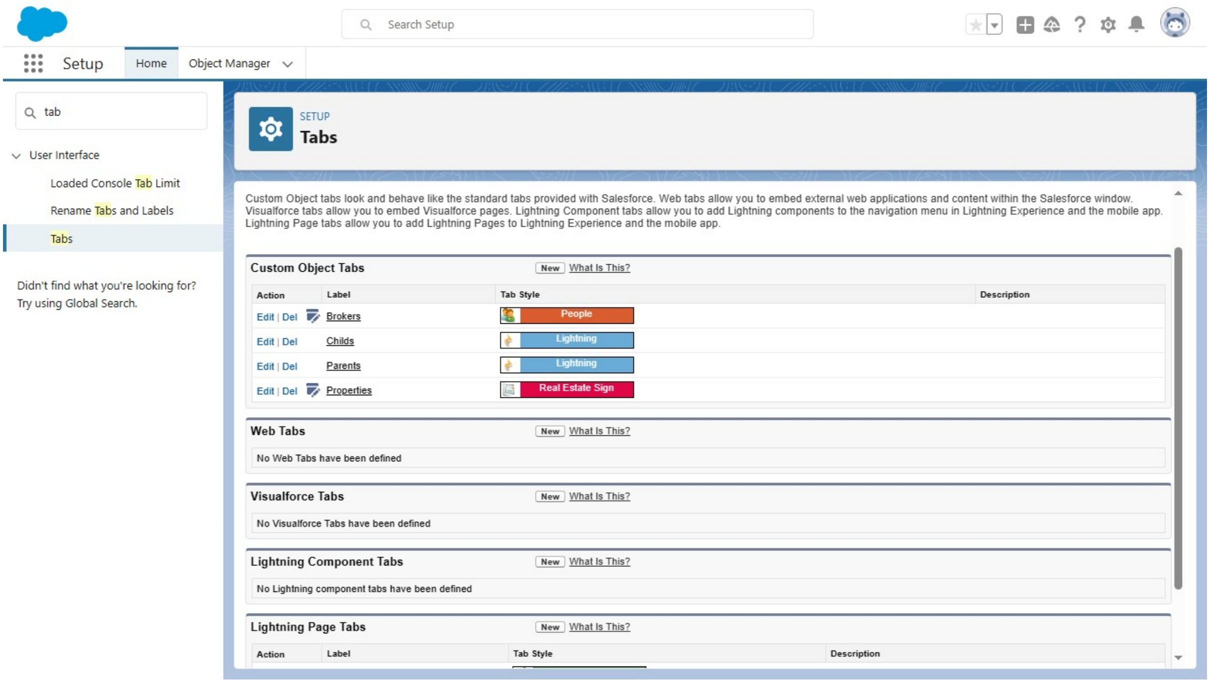
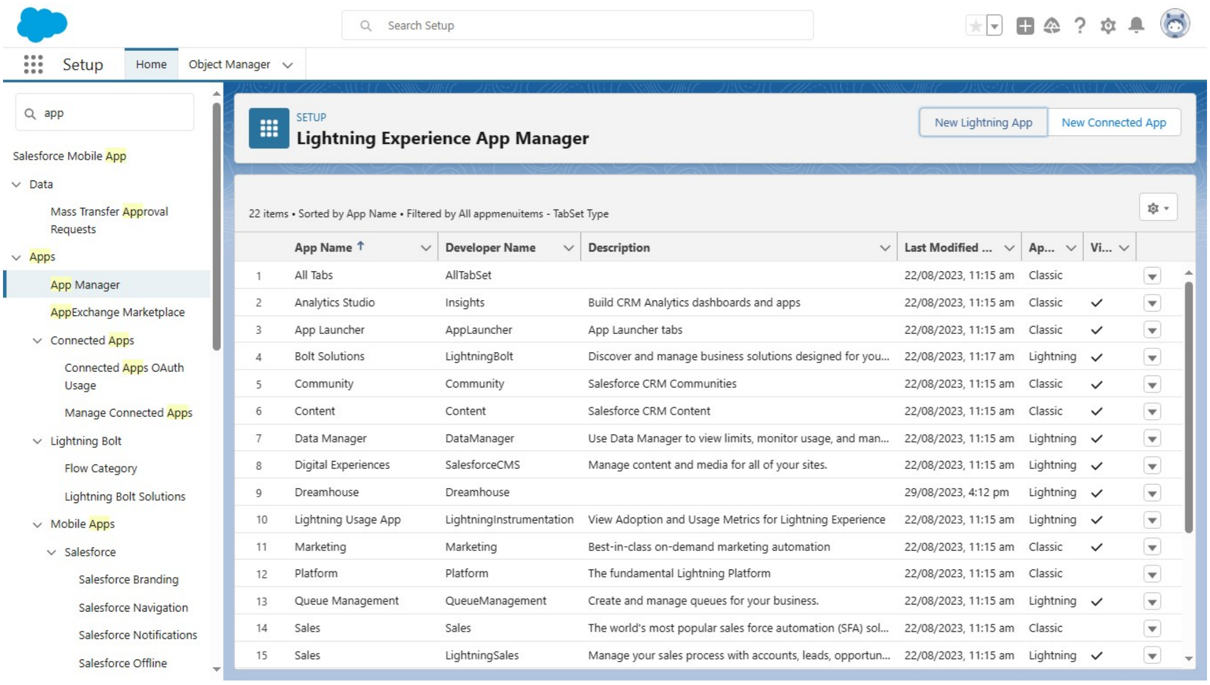


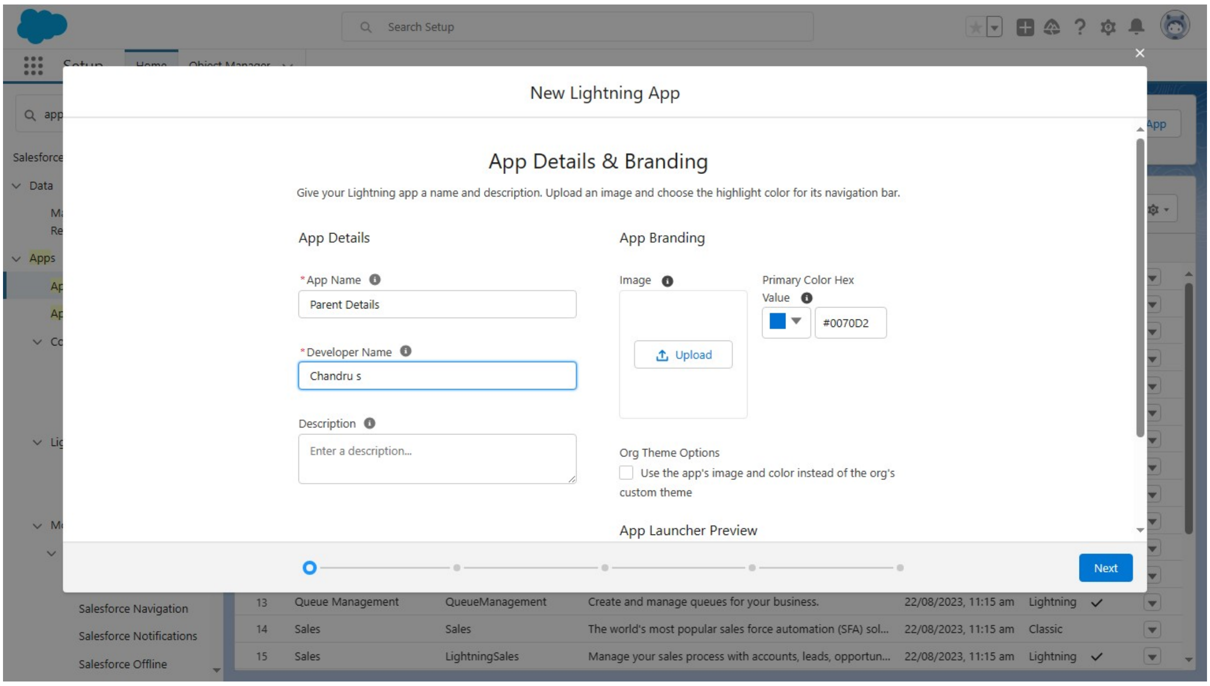


Step 3: Create a Roll-Up Summary Field

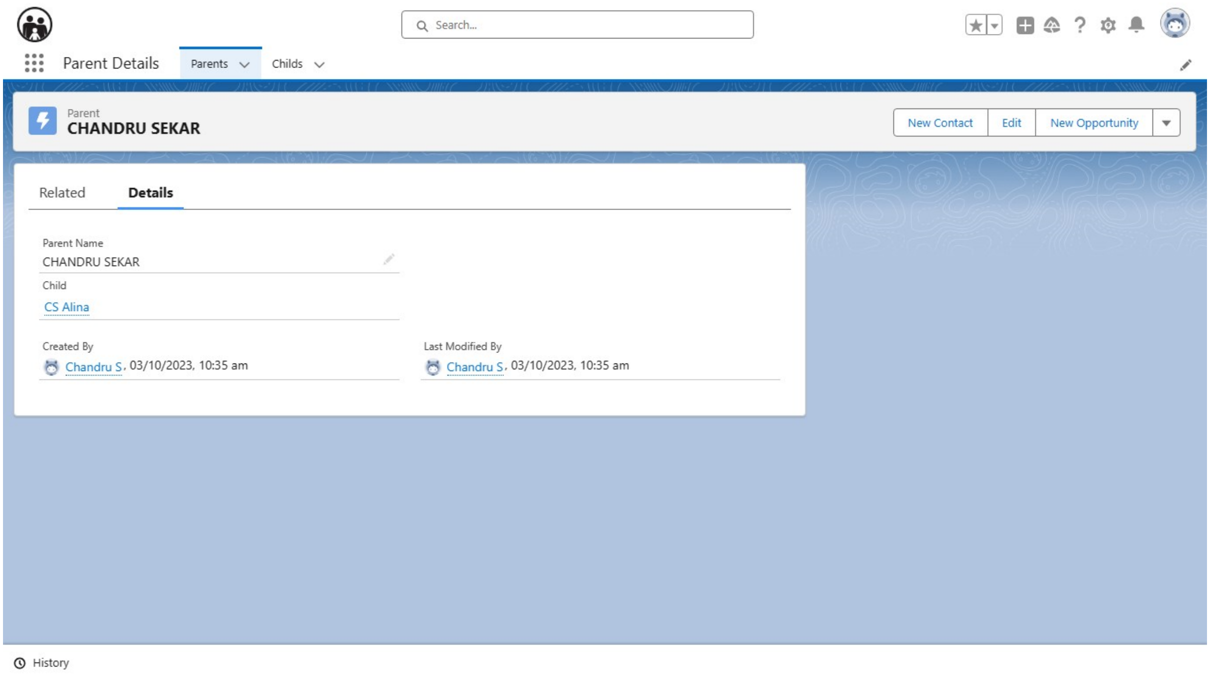


Step 4: Update Page Layouts and Record Types (if necessary)





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



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.

Step 1: Create Sharing Rules

- Log in to your Salesforce account as an Administrator.
- Go to Setup by clicking on your profile picture and selecting "Setup."
- In the Quick Find box, type "Sharing Settings" and select "Sharing Settings."
- Under "Object Settings," find and click on "Account."
- Click on the "New" button next to "Sharing Rules."

Step 2: Create a Criteria-Based Sharing Rule for User A
For User A (assuming User A is identified by some criteria, like a profile or a custom field), you will create a sharing rule that shares records with User A.

- In the "Share with" section, select "Role and Subordinates."
- Choose the appropriate role for User A or a specific public group that includes User A.
- Define the sharing rule criteria. For example, if User A is identified by a custom field called "User_Type__c," you can create a rule like:
- Field: Account:User_Type__c
- Operator: Equals
- Value: User A
- Save the sharing rule.

Step 3: Create a Criteria-Based Sharing Rule for User B
Repeat the same process for User B, creating a criteria-based sharing rule that shares records with User B.

- In the "Share with" section, select "Role and Subordinates."
- Choose the appropriate role for User B or a specific public group that includes User B.
- Define the sharing rule criteria based on how User B is identified. For example:
- Field: Account:User_Type__c
- Operator: Equals
- Value: User B
- Save the sharing rule.

Step 4: Adjust Default Access

To make sure that users who don't meet the criteria specified in the sharing rules don't have access to those records, adjust the default access settings:

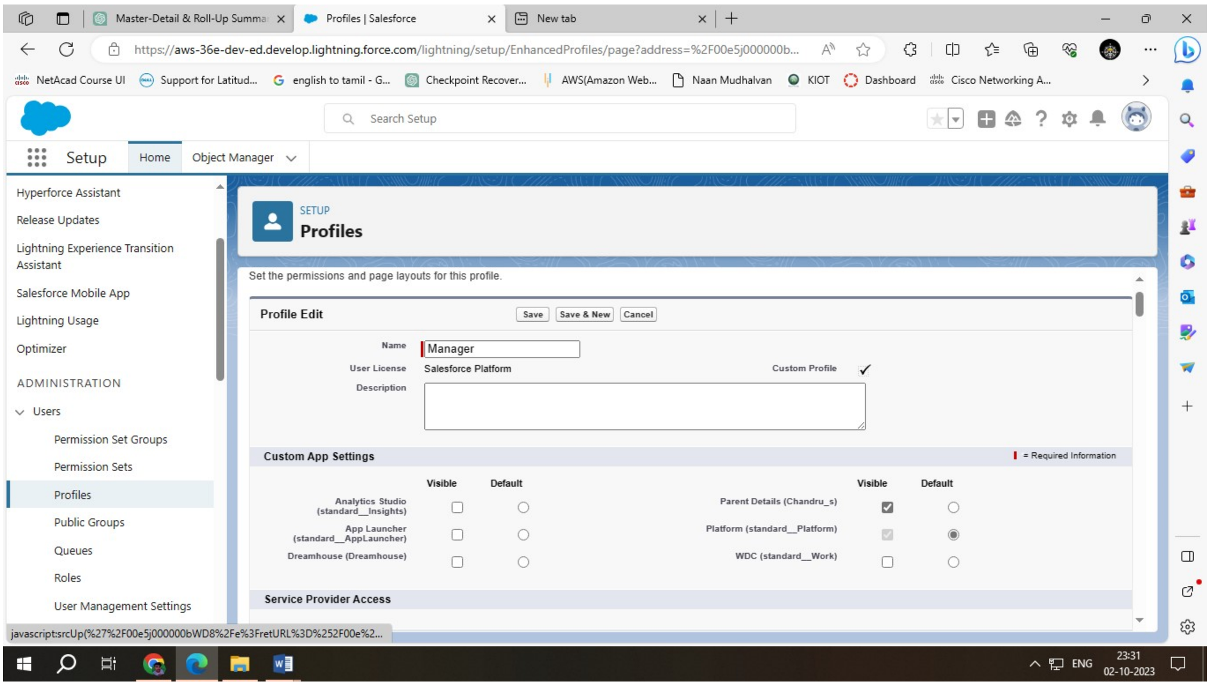
- In "Setup," go to "Objects and Fields" > "Object Manager."
- Click on "Account" to edit it.
- In the left sidebar, click on "Security."
- Under "Organization-Wide Defaults," set the default access level for the Account object to "Private." This ensures that records are private by default.
- Save the changes.

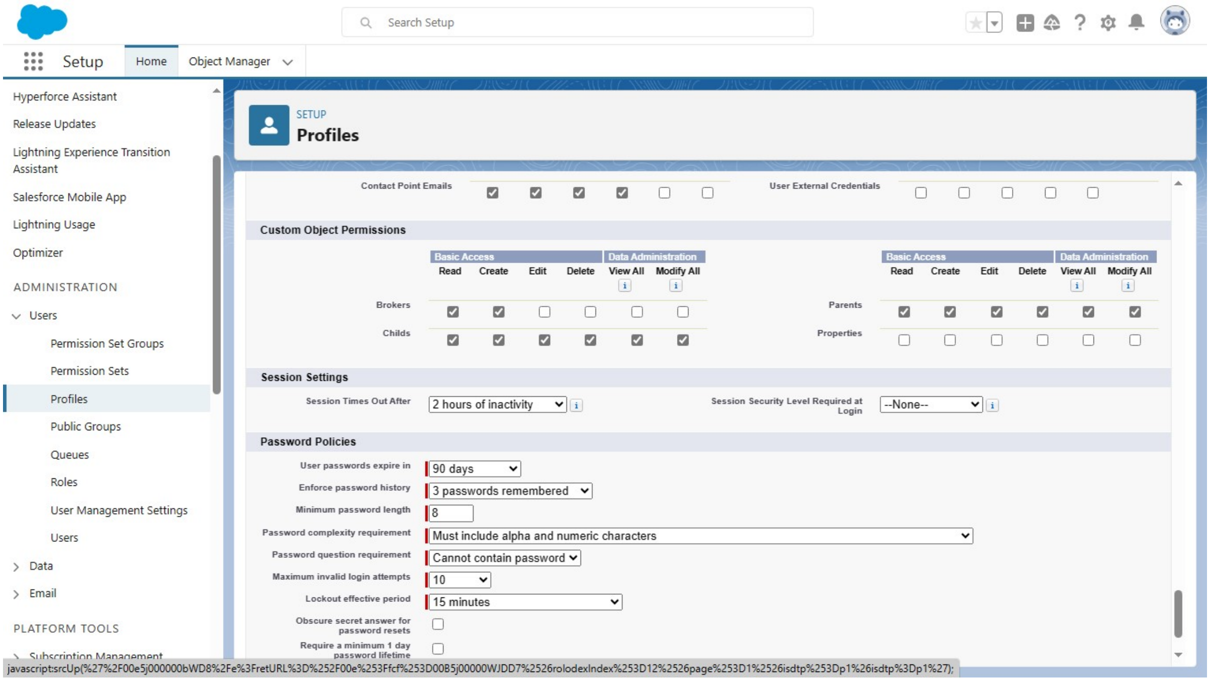
Step 5: Test the Security Settings

Now, User A should only see records that match the User A criteria, and User B should only see records that match the User B criteria. Make sure to thoroughly test these security settings with both User A and User B accounts to ensure that they can only access the records they are supposed to.

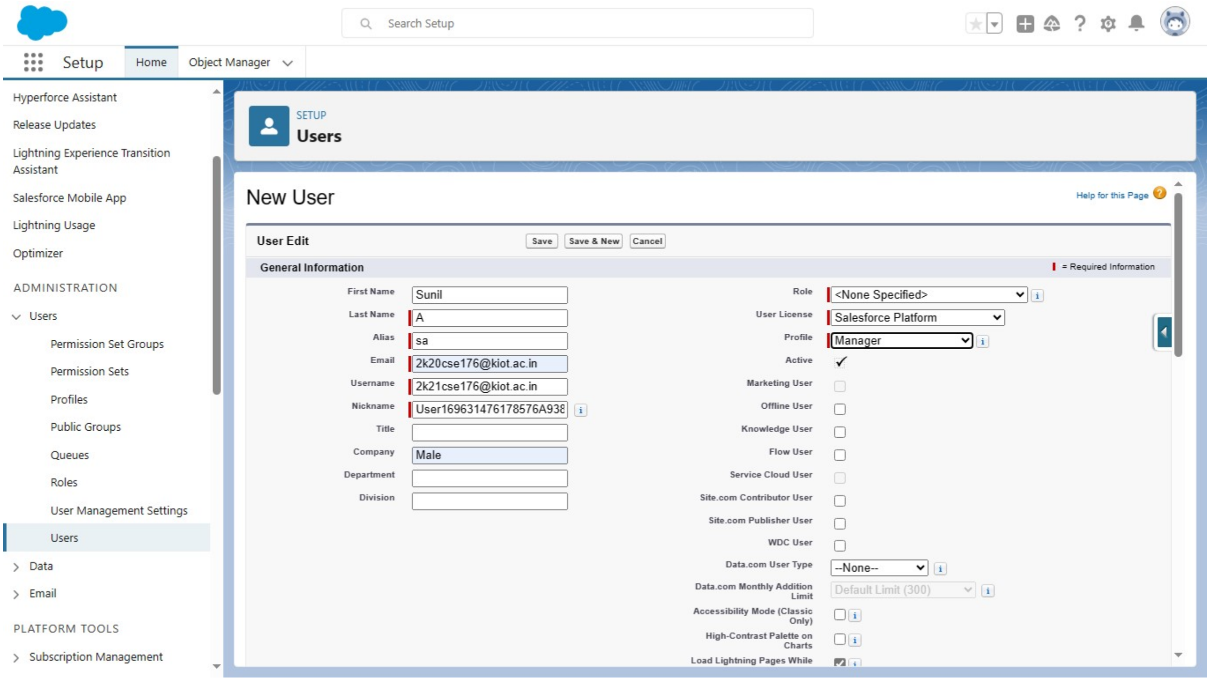
By following these steps and creating sharing rules based on criteria, you can restrict access to specific records for User A and User B in the Account object in Salesforce, ensuring that they cannot see each other's records.

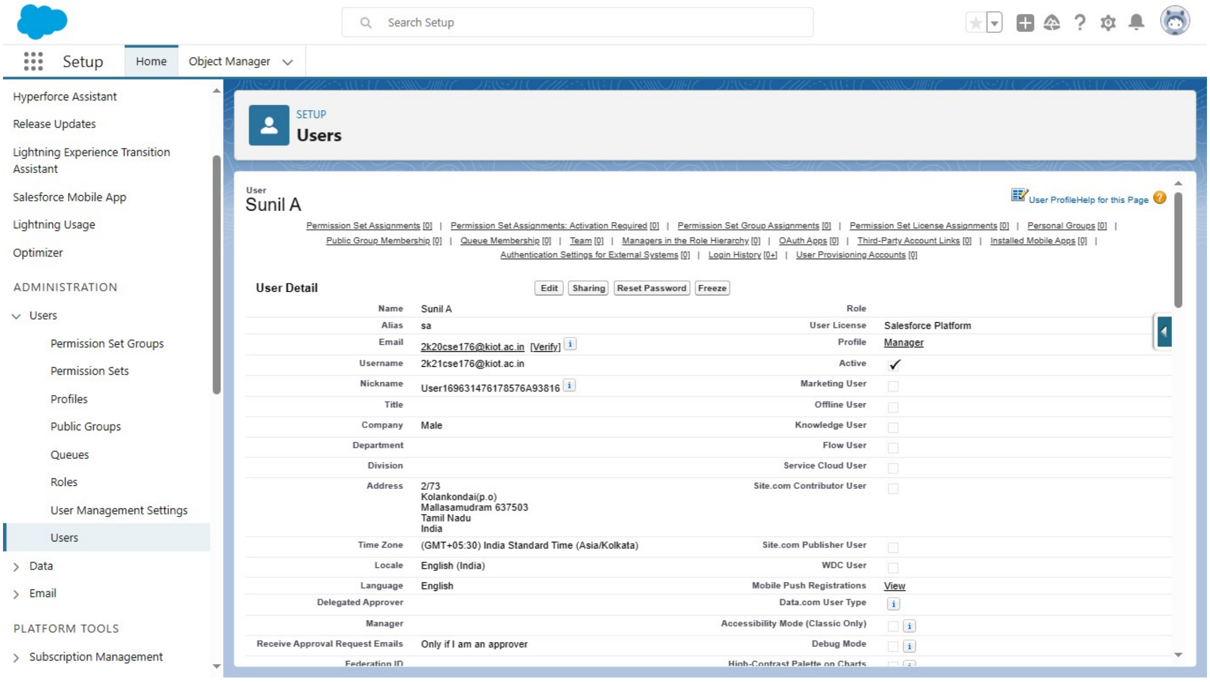
Step 1: Create a Public Group





Step 2: Create Criteria-Based Sharing Rules

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Nickname User169631476178576A93816
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Locale English (India)
Language English
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Knowledge User
Flow User
Service Cloud User
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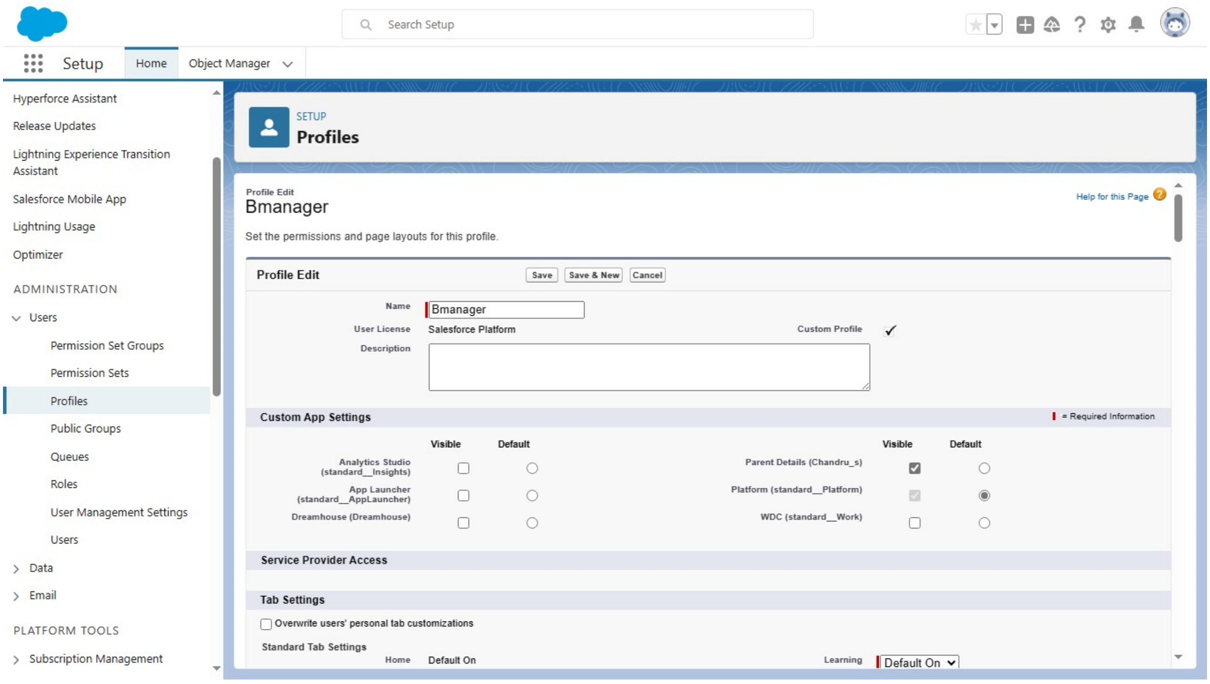
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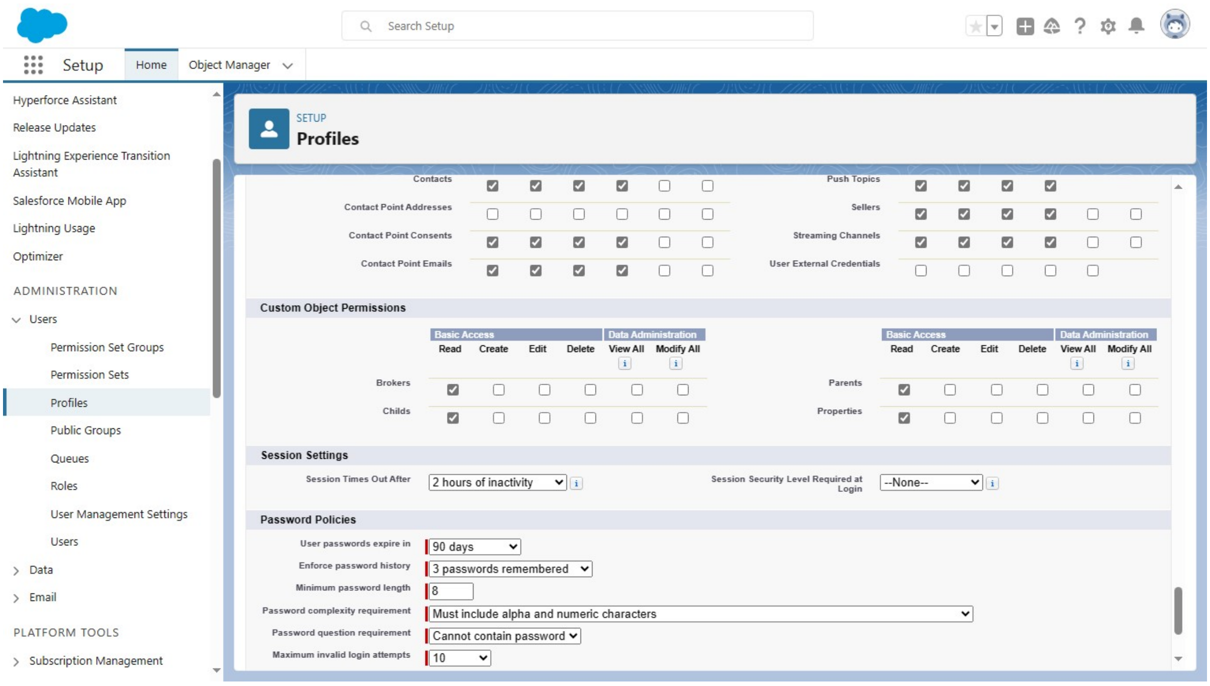
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Create
Edit
Delete
View All
Modify All
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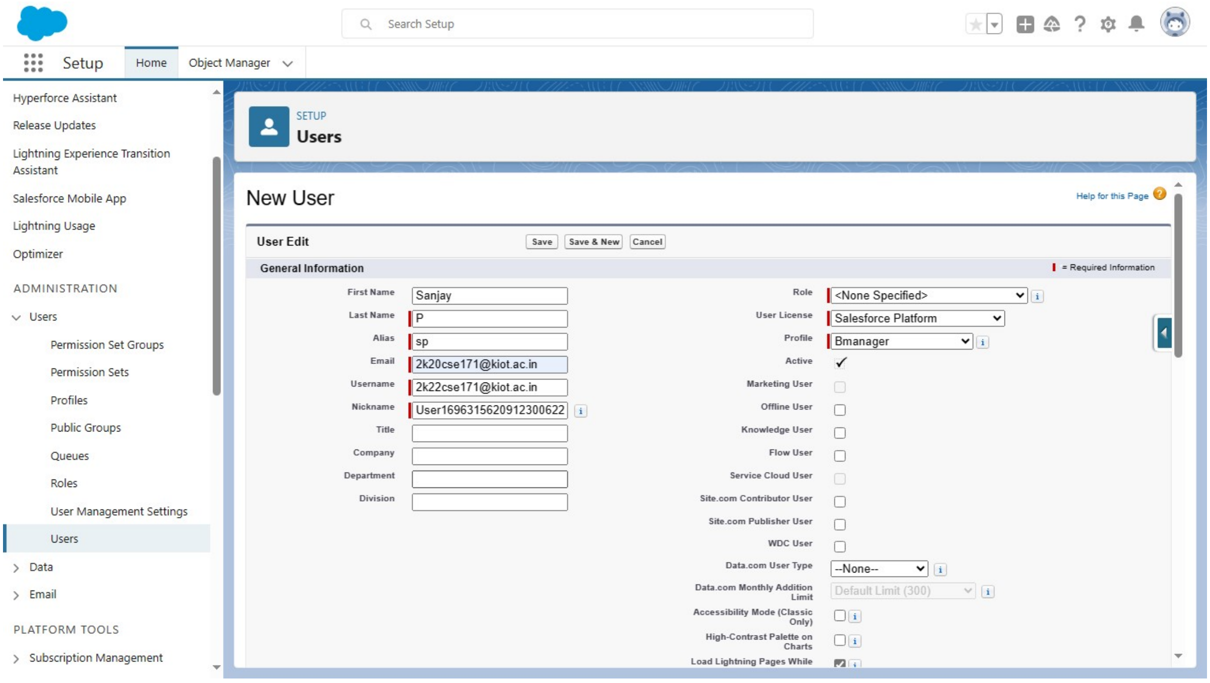
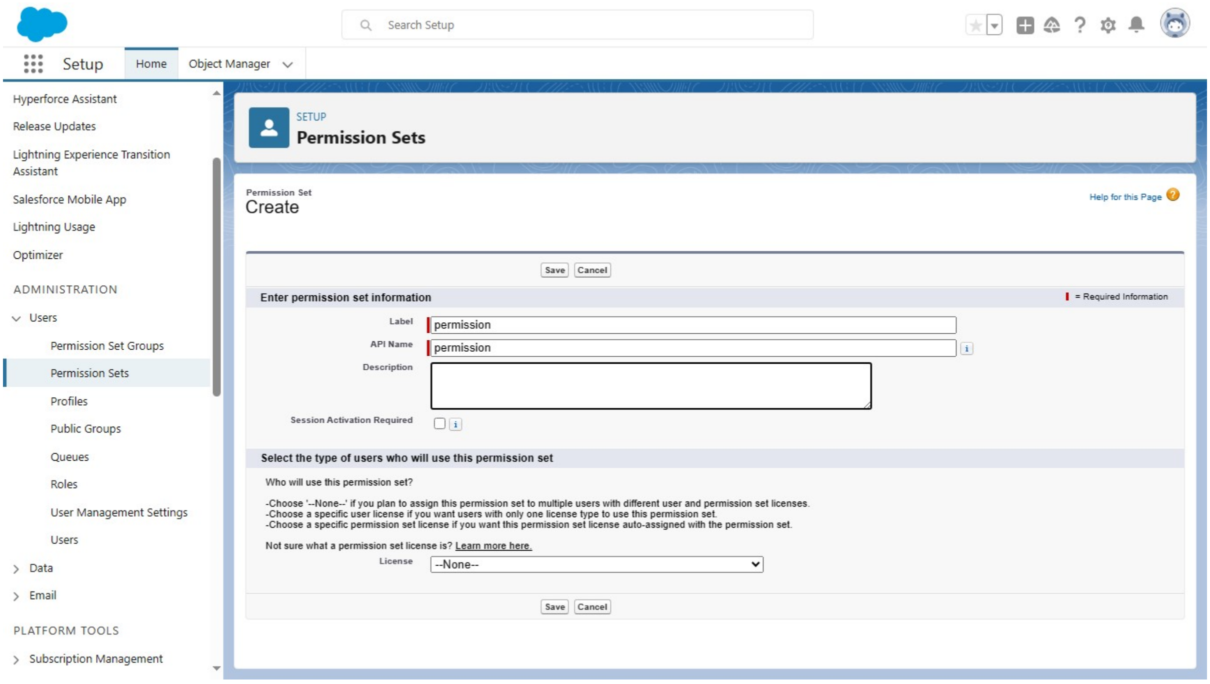
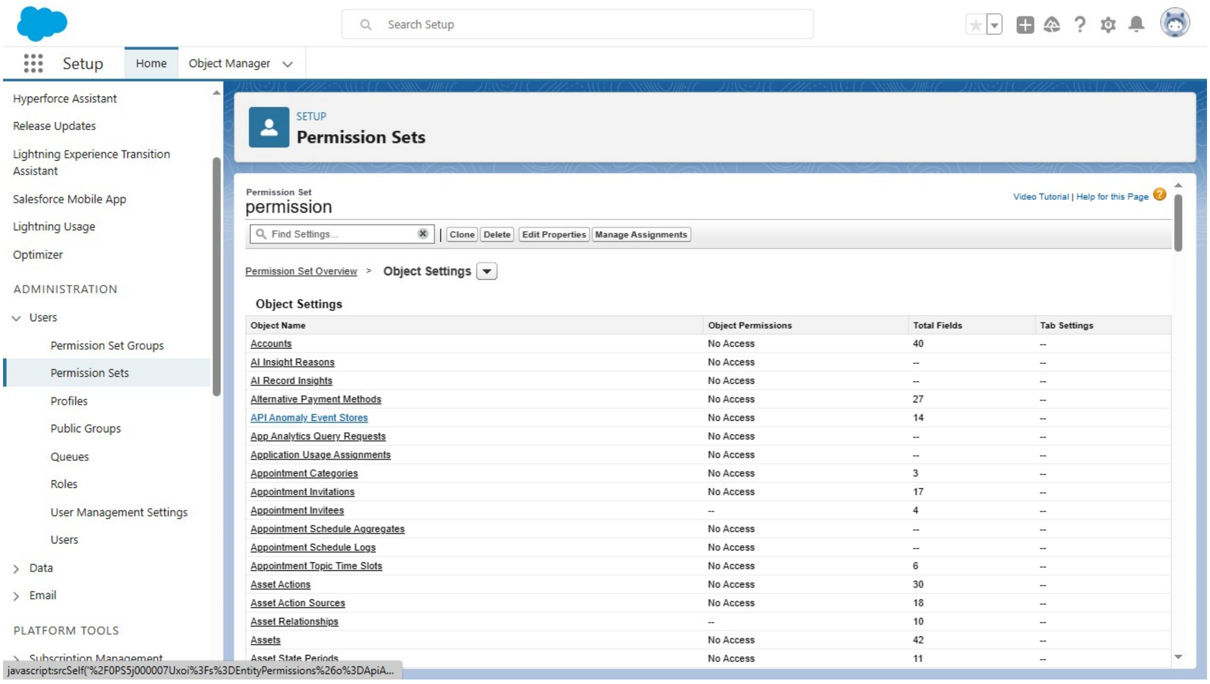
Childs
Parents
Properties
Session Settings
Session Times Out After
2 hours of inactivity
Session Security Level Required at Login
--None--
Password Policies
User passwords expire in
90 days
Enforce password history
3 passwords remembered
Minimum password length
8
Password complexity requirement
Must include alpha and numeric characters
Password question requirement
Cannot contain password
Maximum invalid login attempts
10

For User B:



Step 3: Assign Records Ownership

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Permission Set Overview > Object Settings
Object Settings
Object Name | Object Permissions | Total Fields | Tab Settings
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AI Insight Reasons | No Access | -- | --
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 | --
Appointment Schedule Aggregates | No Access | -- | --
Appointment Schedule Logs | No Access | -- | --
Appointment Topic Time Slots | No Access | 6 | --
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Asset Relationships | -- | 10 | --
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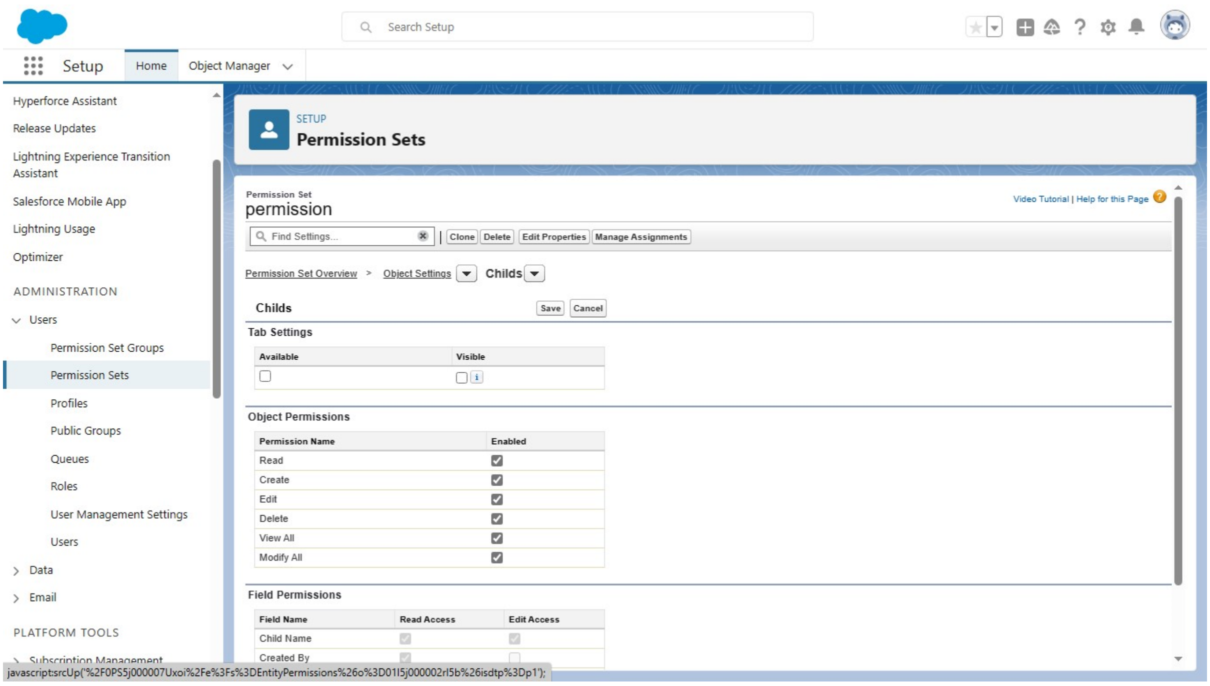
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Field Permissions
Field Name
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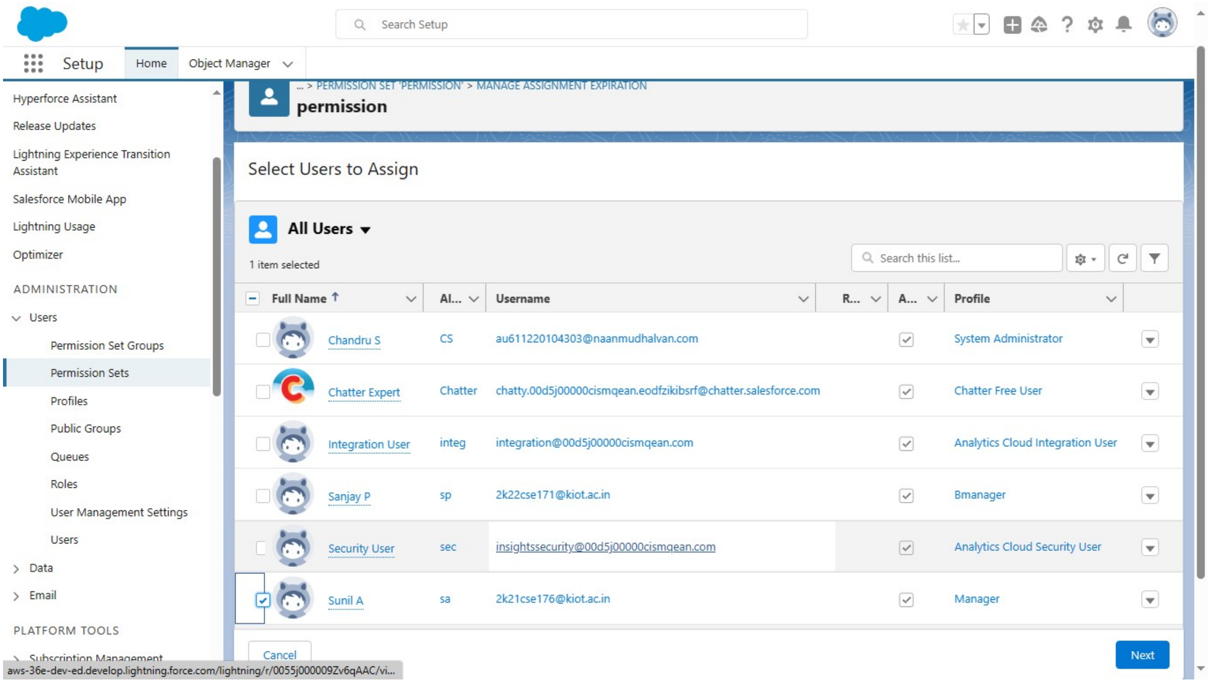
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Select Users to Assign
All Users
1 item selected
Search this list...
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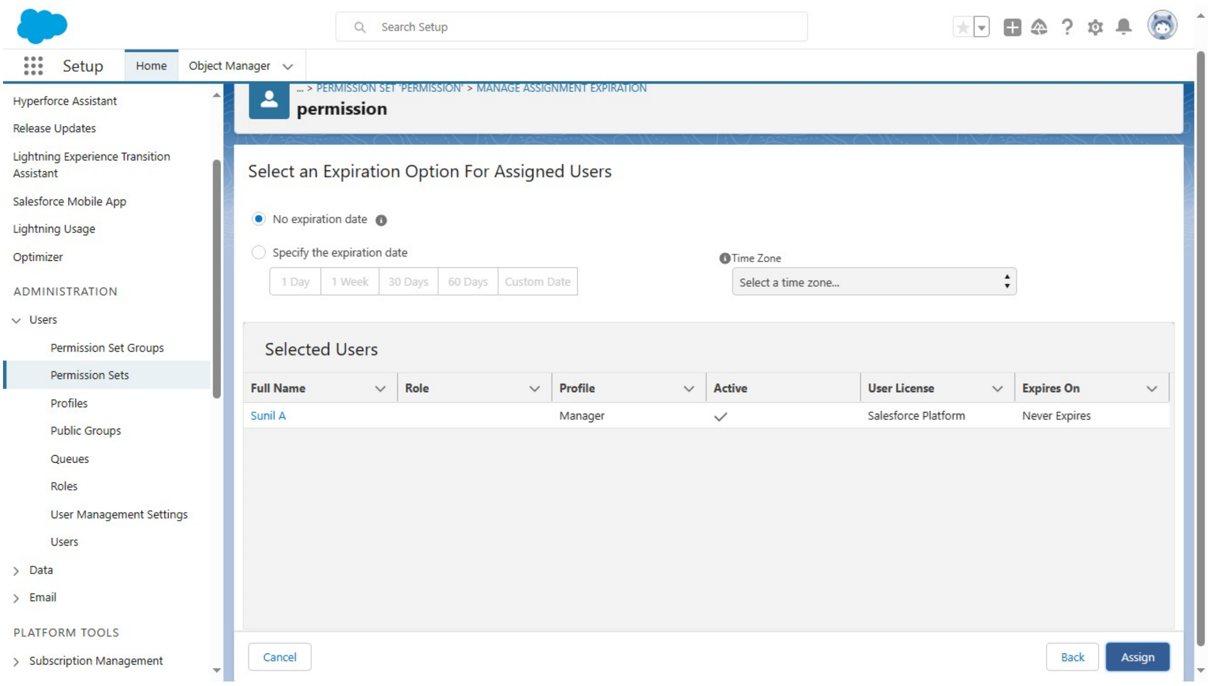
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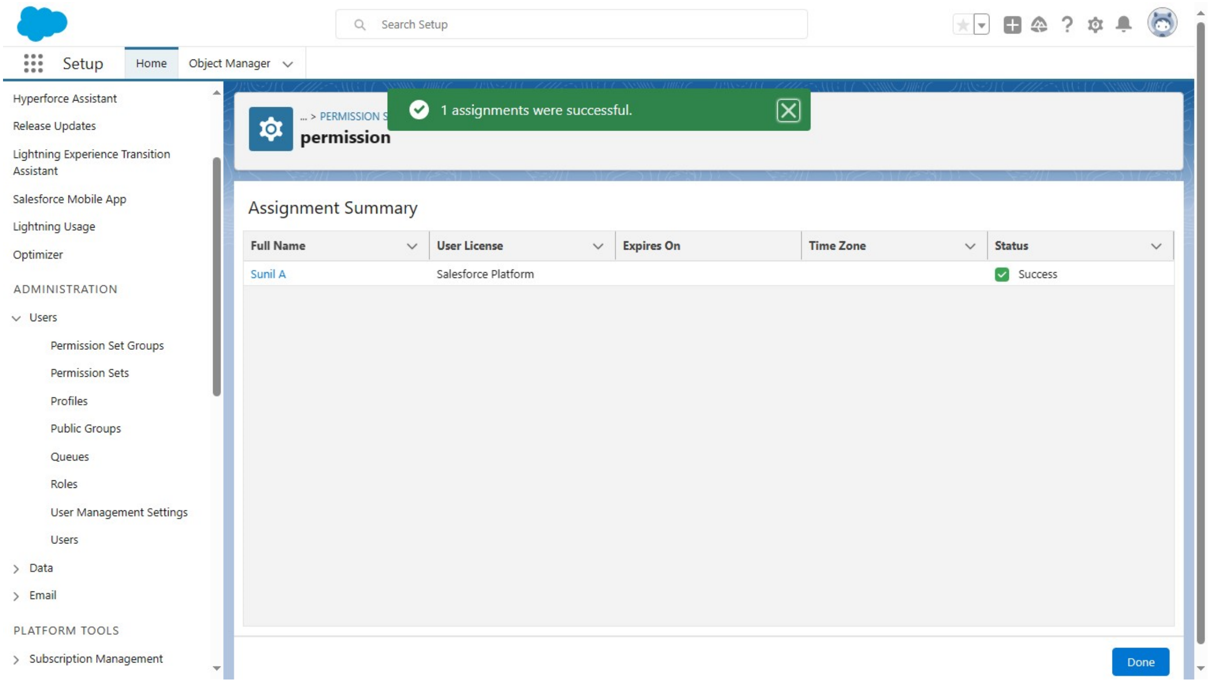
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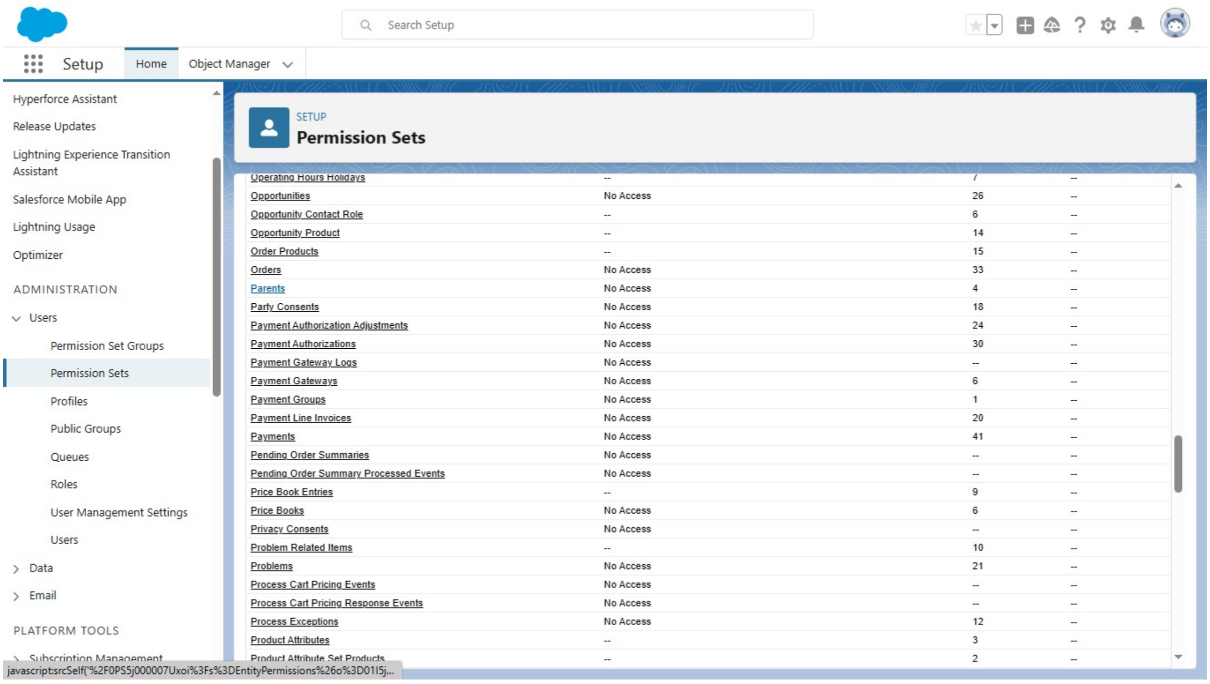
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Order Products -- 15 --
Orders No Access 33 --
Parents No Access 4 --
Party Consents No Access 18 --
Payment Authorization Adjustments No Access 24 --
Payment Authorizations No Access 30 --
Payment Gateway Logs No Access -- --
Payment Gateways No Access 6 --
Payment Groups No Access 1 --
Payment Line Invoices No Access 20 --
Payments No Access 41 --
Pending Order Summaries No Access -- --
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 --
Process Cart Pricing Events No Access -- --
Process Cart Pricing Response Events No Access -- --
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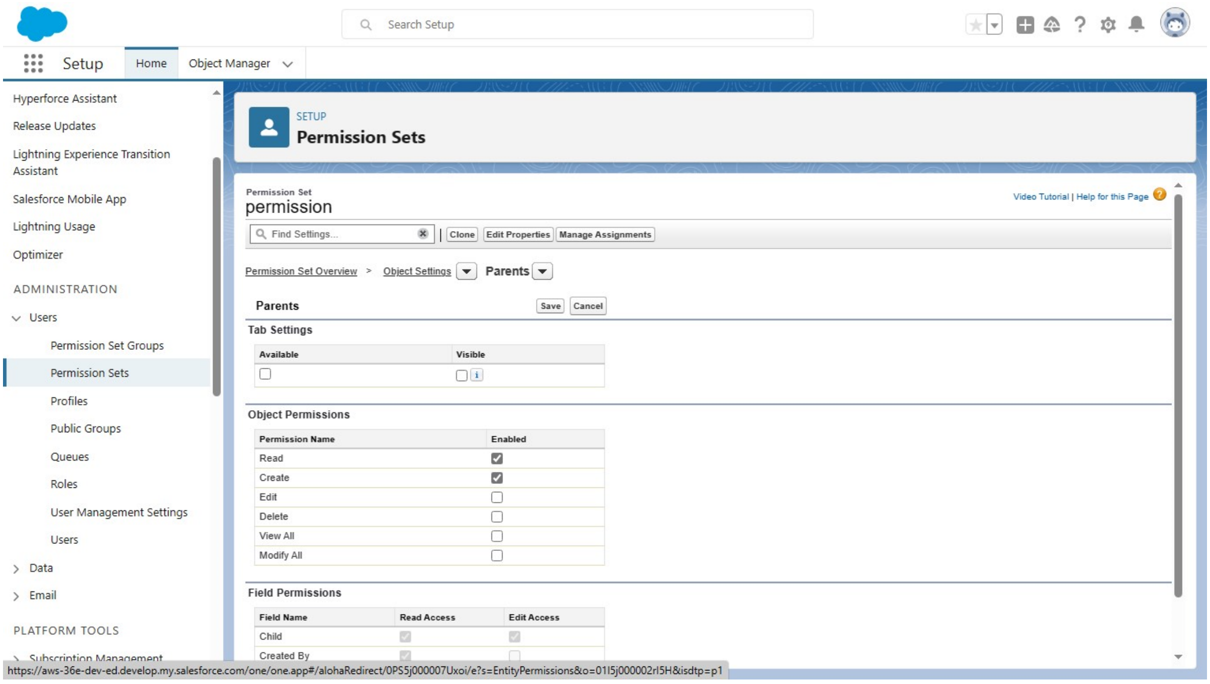
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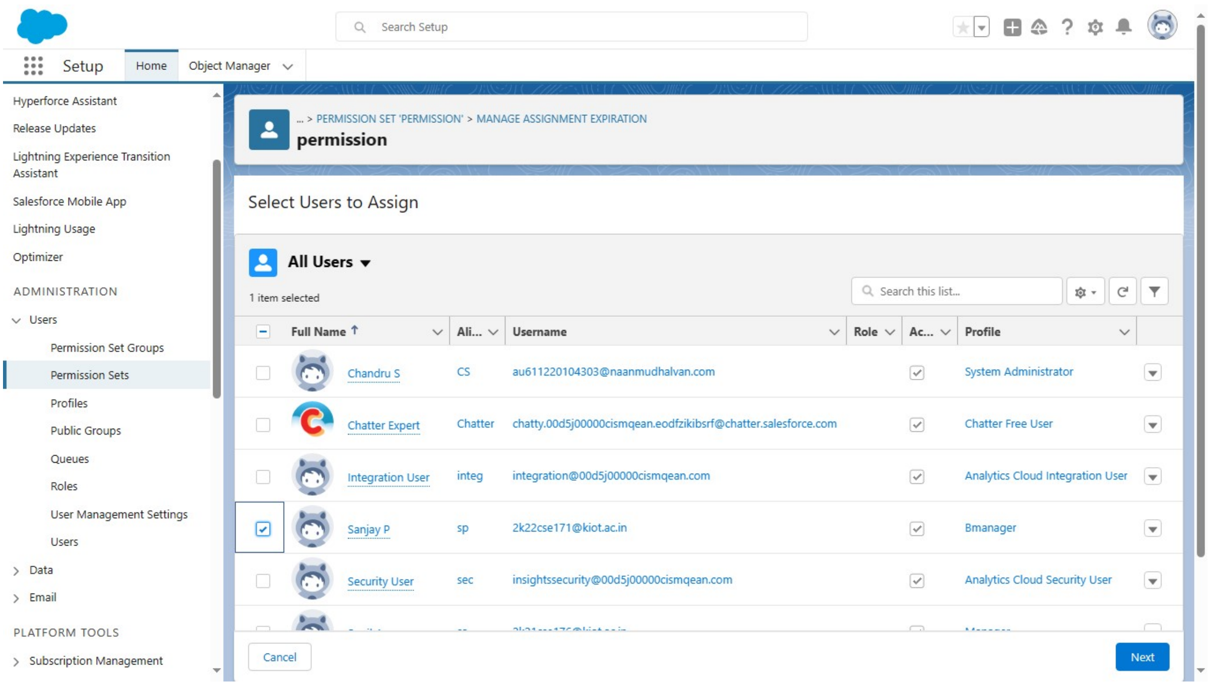
Search Setup
Setup
Home
Object Manager
... > PERMISSION SET 'PERMISSION' > MANAGE ASSIGNMENT EXPIRATION
permission
Select Users to Assign
All Users
1 item selected
Search this list...
Full Name
Ali...
Username
Role
Ac...
Profile
Chandru S
CS
au611220104303@naanmudhalvan.com
System Administrator
Chatter Expert
Chatter
chatty.00d5j00000cismqean.eodfzikibsrf@chatter.salesforce.com
Chatter Free User
Integration User
integ
integration@00d5j00000cismqean.com
Analytics Cloud Integration User
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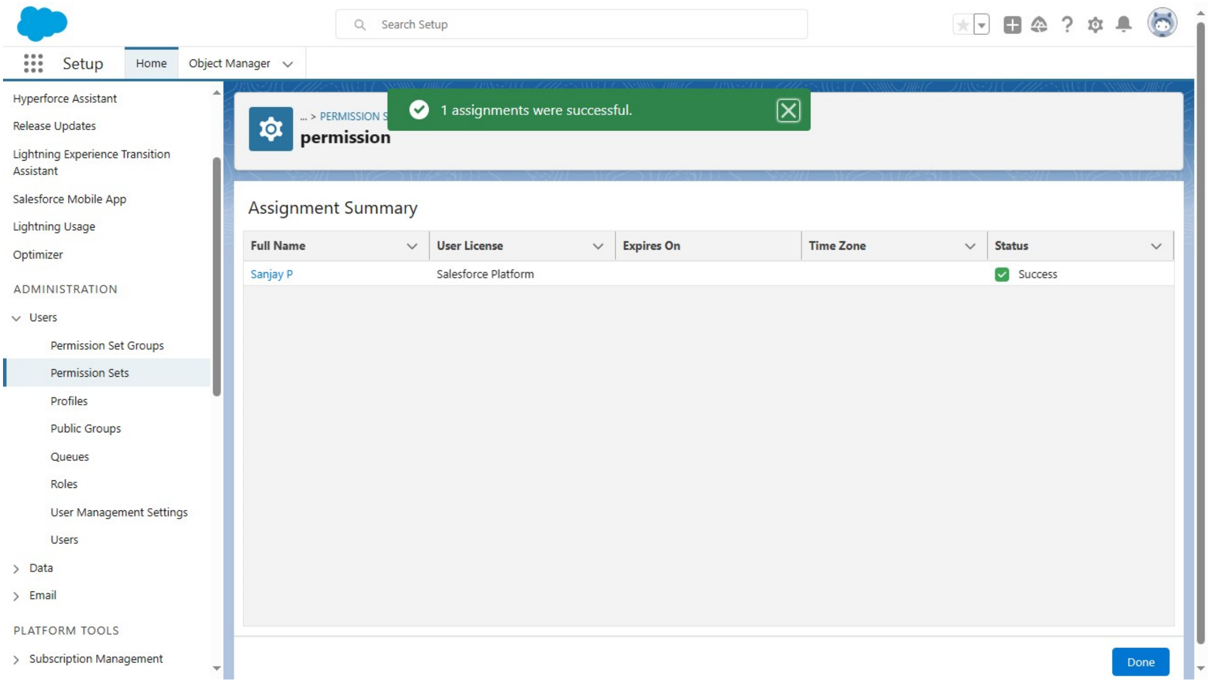
Analytics Cloud Security User
Cancel
Next



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

Since both users currently have the same profile and you want to grant additional permissions to one of them, you can create a Permission Set to grant delete access. Here are the steps:

- Log in to Salesforce as an Administrator.
- Go to Setup by clicking on your profile picture and selecting "Setup."
- In the Quick Find box, type "Permission Sets" and select "Permission Sets."
- Click the "New Permission Set" button.
- Fill out the necessary information, including the Label and API Name.
- In the "App Permissions" section, click "Edit."

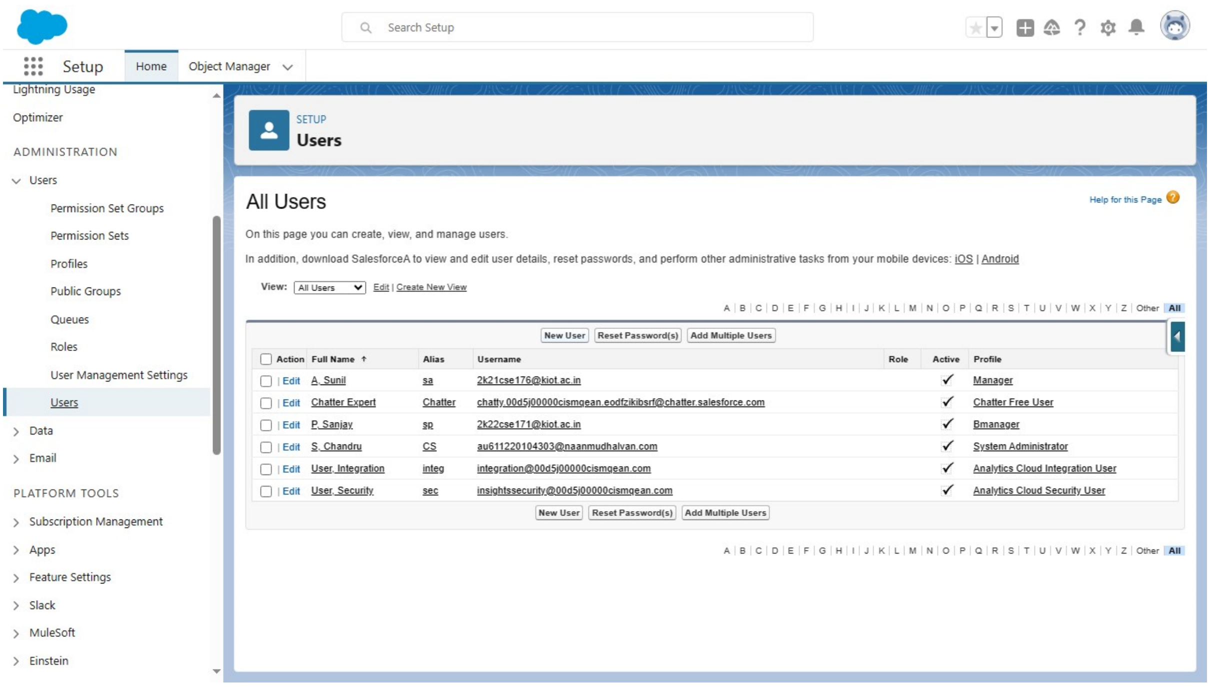
- Enable the "Delete" permission for the Account object.
- Save the Permission Set.

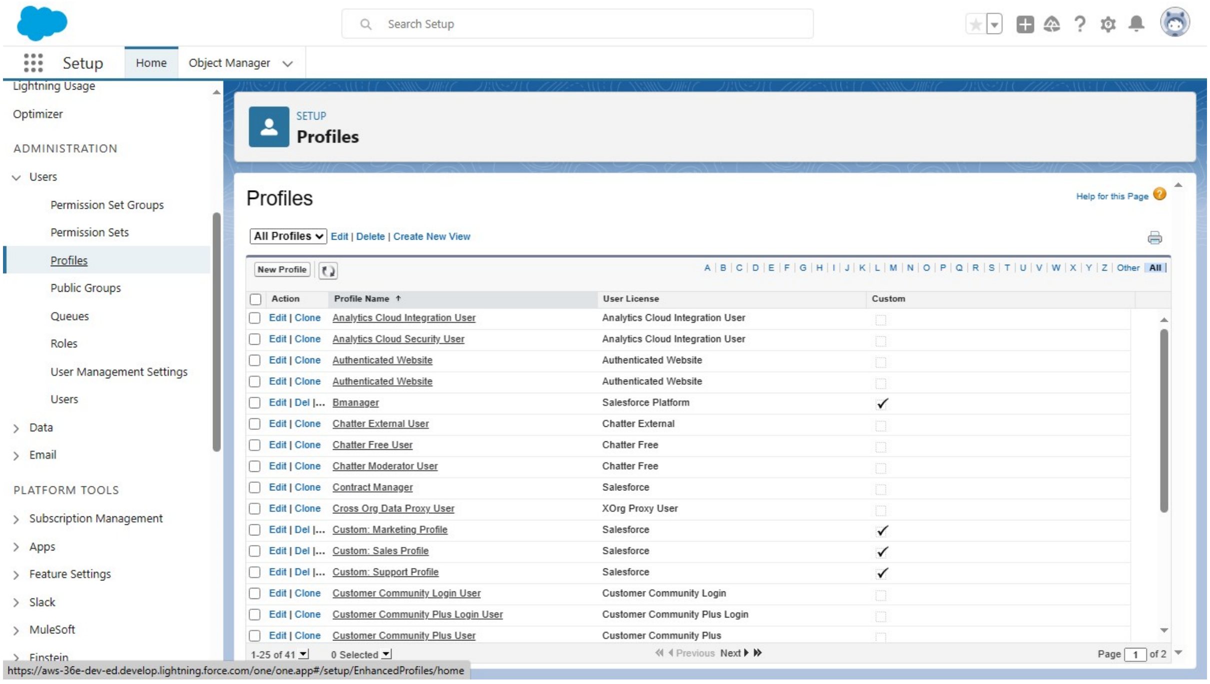
Step 2: Assign the Permission Set
Now, you need to assign the Permission Set to the user who should have delete access. Follow these steps:

- While still in the Permission Set detail page, click on the "Manage Assignments" button.
- Click the "Add Assignments" button.
- Search and select the user who should have delete access.
- Save the assignment.

Step 3: Verify User Access
At this point, the user you assigned the Permission Set to will have delete access to the Account object. The other user with the same profile will still have Create, Read, and Edit access but not delete access.

Step 1: Create a Permission Set for Delete Access




Search Setup
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Lightning Usage
Optimizer
ADMINISTRATION
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
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Subscription Management
Apps
Feature Settings
Slack
MuleSoft
Einstein
SETUP
Profiles
Profiles
Help for this Page
All Profiles
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New Profile
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Edit | Clone Customer Community Plus Login User Customer Community Plus Login
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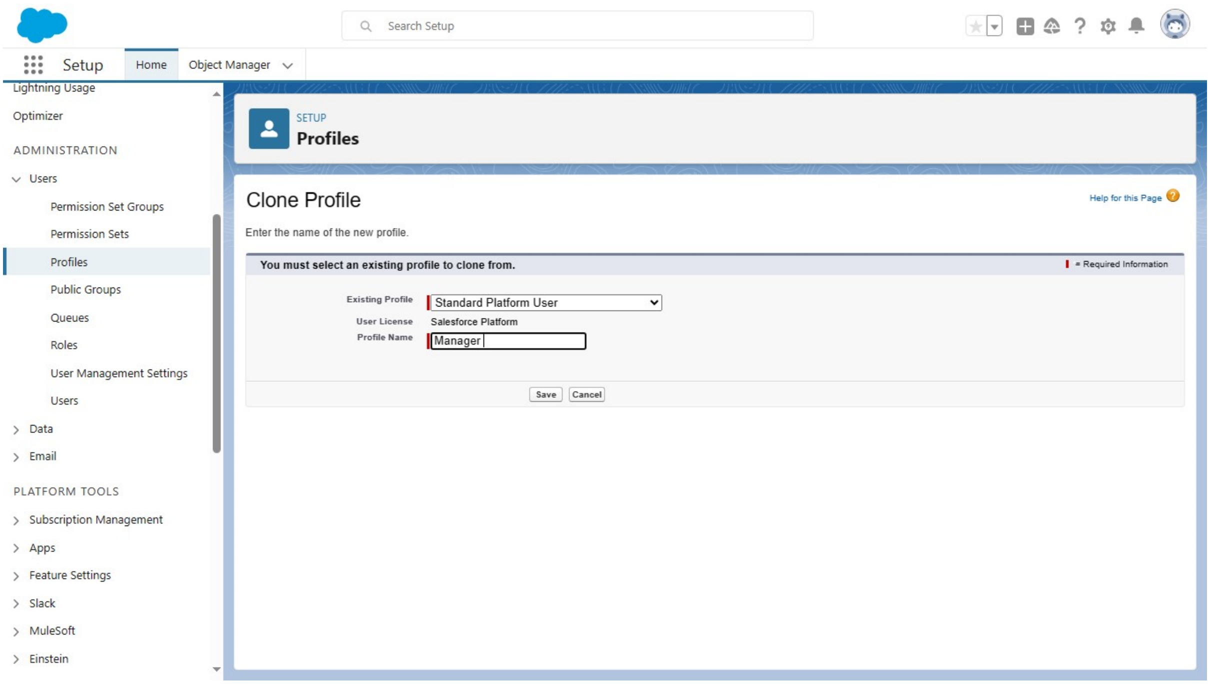
Page 1 of 2
https://aws-36e-dev-ed.develop.lightning.force.com/one/one.app#/setup/EnhancedProfiles/home


Search Setup
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Email
PLATFORM TOOLS
Subscription Management
Apps
Feature Settings
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MuleSoft
Einstein
SETUP
Profiles
Clone Profile
Help for this Page
Enter the name of the new profile.
You must select an existing profile to clone from.
= Required Information
Existing Profile
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User License
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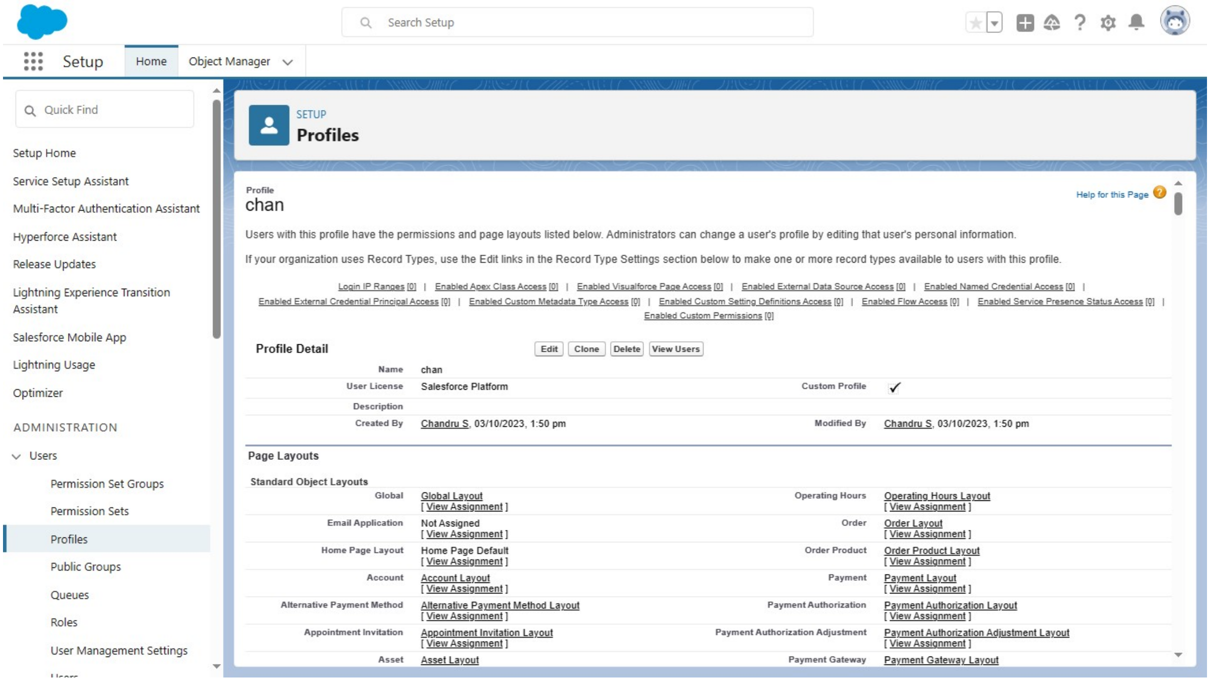
Search Setup
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Multi-Factor Authentication Assistant
Hyperforce Assistant
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SETUP
Profiles
Profile
chan
Help for this Page
Users with this profile have the permissions and page layouts listed below. 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 Visualforce Page 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
chan
User License
Salesforce Platform
Custom Profile
Description
Created By
Chandru S, 03/10/2023, 1:50 pm
Modified By
Chandru S, 03/10/2023, 1:50 pm
Page Layouts
Standard Object Layouts
Global
Global Layout
[View Assignment]
Operating Hours
Operating Hours Layout
[View Assignment]
Email Application
Not Assigned
[View Assignment]
Order
Order Layout
[View Assignment]
Home Page Layout
Home Page Default
[View Assignment]
Order Product
Order Product Layout
[View Assignment]
Account
Account Layout
[View Assignment]
Payment
Payment Layout
[View Assignment]
Alternative Payment Method
Alternative Payment Method Layout
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Payment Authorization
Payment Authorization Layout
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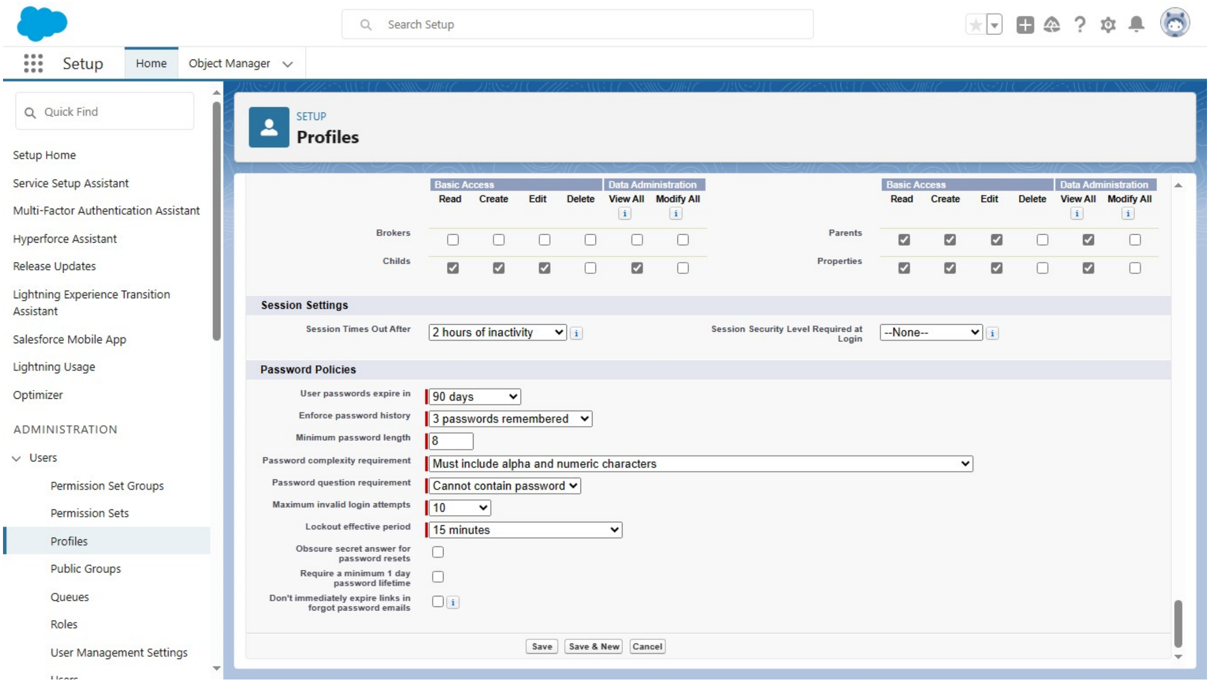
Asset
Asset Layout
Payment Gateway
Payment Gateway Layout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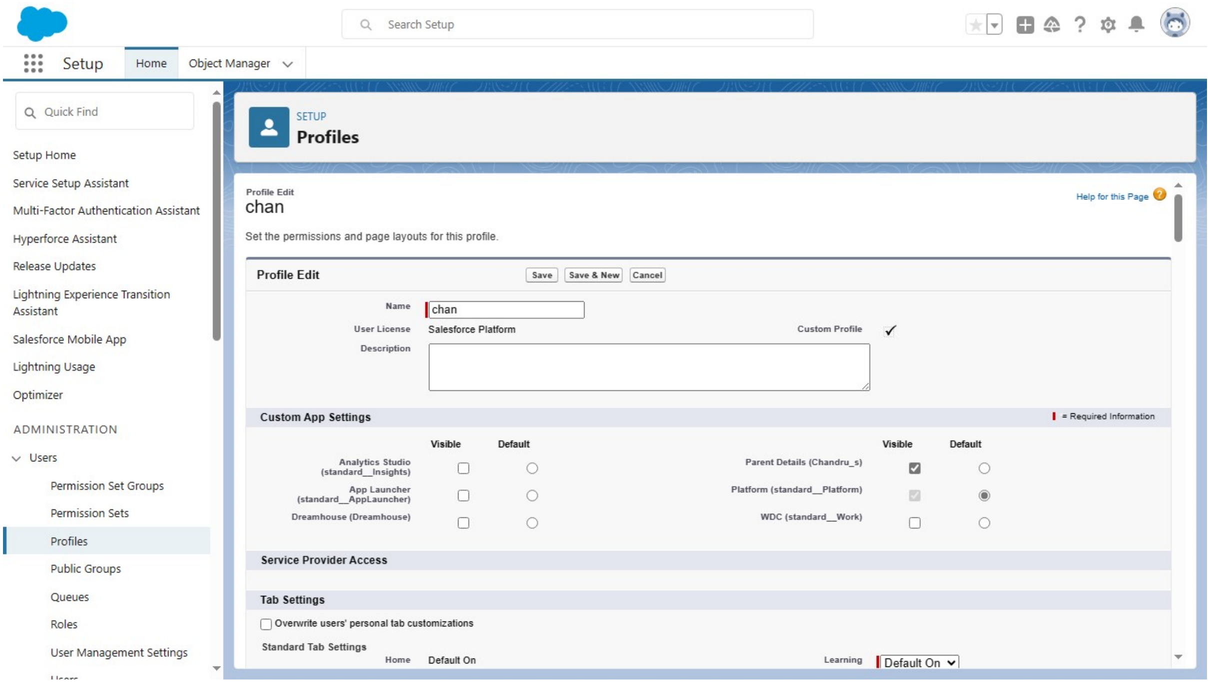
Data Administration
Read
Create
Edit
Delete
View All
Modify All
Brokers
Childs
Parents
Properties
Session Settings
Session Times Out After
2 hours of inactivity
Session Security Level Required at Login
--None--
Password Policies
User passwords expire in
90 days
Enforce password history
3 passwords remembered
Minimum password length
8
Password complexity requirement
Must include alpha and numeric characters
Password question requirement
Cannot contain password
Maximum invalid login attempts
10
Lockout effective period
15 minutes
Obscure secret answer for password resets
Require a minimum 1 day password lifetime
Don't immediately expire links in forgot password emails
Save
Save & New
Cancel


Search Setup
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Set the permissions and page layouts for this profile.
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Cancel
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Description
Custom App Settings
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Default
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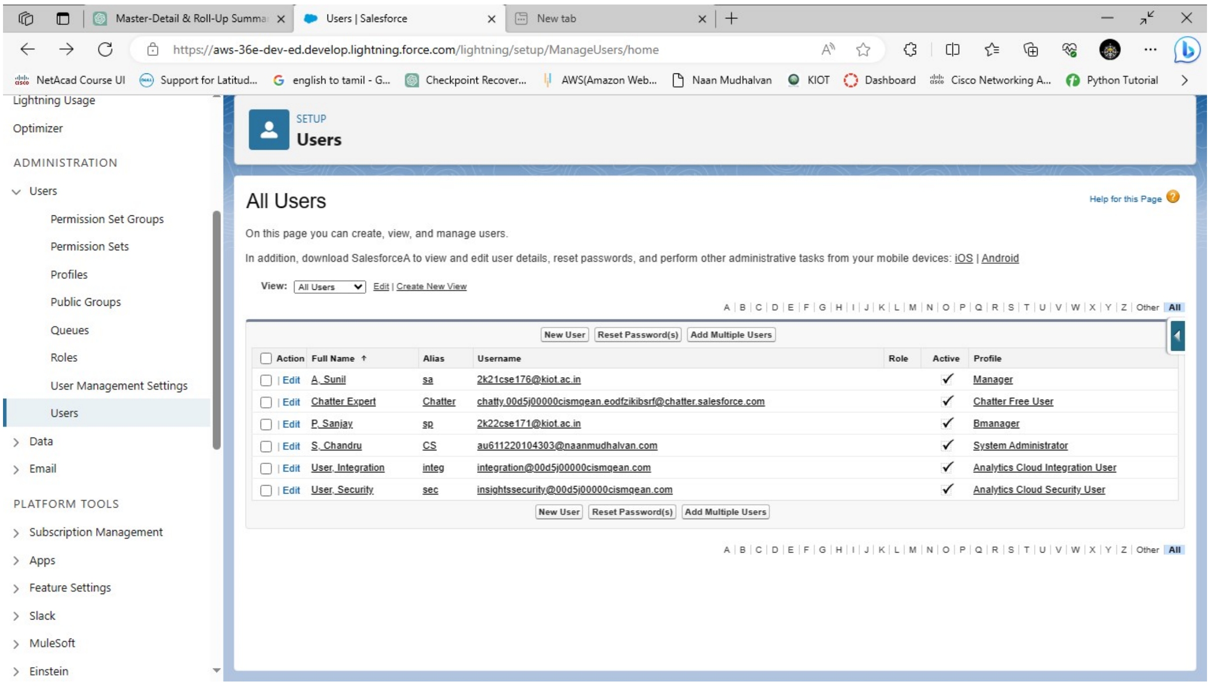
App Launcher (standard__AppLauncher)
Dreamhouse (Dreamhouse)
Parent Details (Chandru_s)
Platform (standard__Platform)
WDC (standard__Work)
Service Provider Access
Tab Settings
Overwrite users' personal tab customizations
Standard Tab Settings
Home
Default On
Learning
Default On



Master-Detail & Roll-Up Summa
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NetAcad Course UI
Support for Latitud...
english to tamil - G...
Checkpoint Recover...
AWS(Amazon Web...
Naan Mudhalvan
KIOT
Dashboard
Cisco Networking A...
Python Tutorial
Lightning Usage
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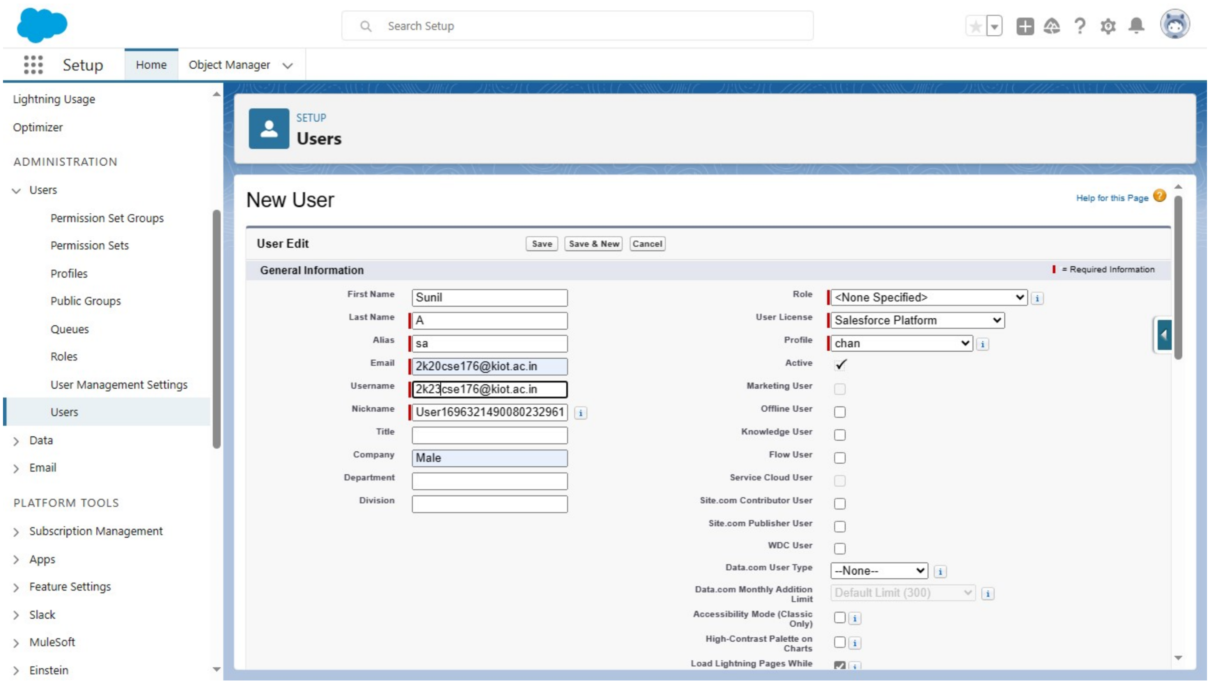
SETUP
Users
All Users
Help for this Page
On this page you can create, view, and manage users.
In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: iOS | Android
View: All Users Edit | Create New View
A | B | 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
New User
Reset Password(s)
Add Multiple Users
Action Full Name Alias Username Role Active Profile
Edit A, Sunil sa 2k21cse176@kiot.ac.in Manager
Edit Chatter Expert Chatter chatty.00d5j00000cismgean.eodfzikibsrf@chatter.salesforce.com Chatter Free User
Edit P, Sanjay sp 2k22cse171@kiot.ac.in Bmanager
Edit S, Chandru CS au611220104303@naanmudhalvan.com System Administrator
Edit User, Integration integ integration@00d5j00000cismgean.com Analytics Cloud Integration User
Edit User, Security sec insightssecurity@00d5j00000cismgean.com Analytics Cloud Security User



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General Information
= Required Information
First Name Sunil
Last Name A
Alias sa
Email 2k20cse176@kiot.ac.in
Username 2k23cse176@kiot.ac.in
Nickname User1696321490080232961
Title
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Department
Division
Role <None Specified>
User License Salesforce Platform
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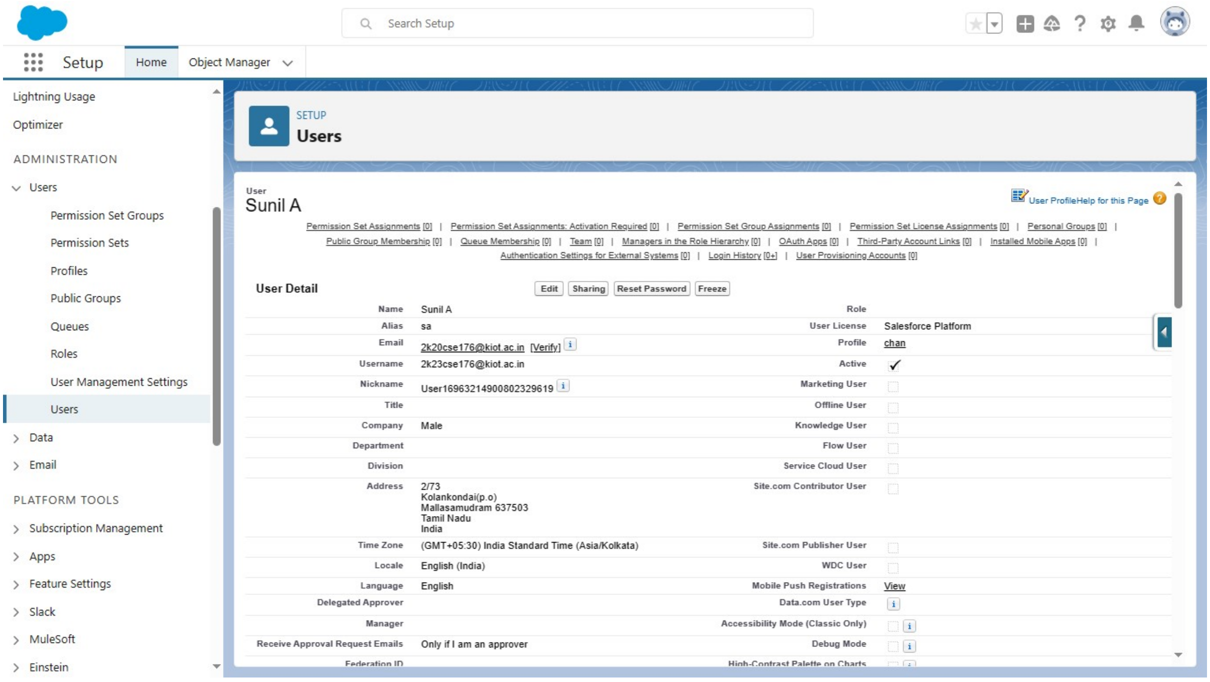
Marketing User
Offline User
Knowledge User
Flow User
Service Cloud User
Site.com Contributor User
Site.com Publisher User
WDC User
Data.com User Type --None--
Data.com Monthly Addition Limit Default Limit (300)
Accessibility Mode (Classic Only)
High-Contrast Palette on Charts
Load Lightning Pages While


Search Setup
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User ProfileHelp for this Page
User Detail
Edit
Sharing
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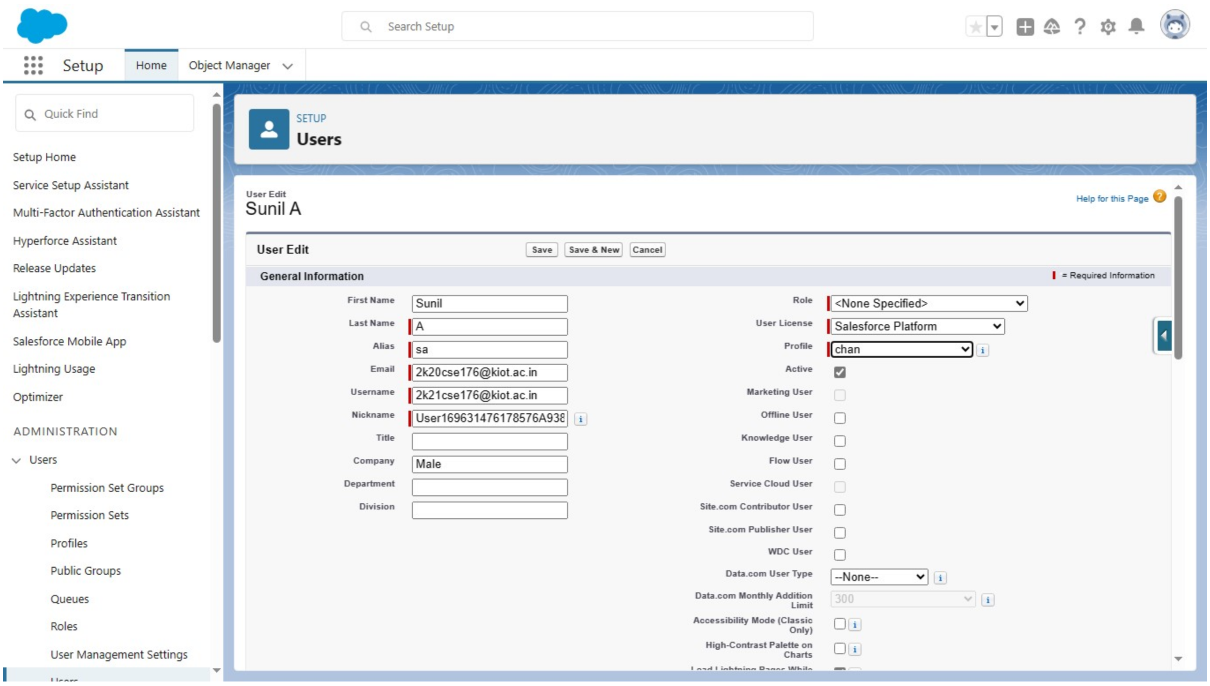
Freeze
Name Sunil A
Role
Alias sa
User License Salesforce Platform
Email 2k20cse176@kiot.ac.in [Verify]
Profile chan
Username 2k23cse176@kiot.ac.in
Active
Nickname User16963214900802329619
Marketing User
Title
Offline User
Company Male
Knowledge User
Department
Flow User
Division
Service Cloud User
Address 2/73
Kolankondai(p.o)
Mallasamudram 637503
Tamil Nadu
India
Site.com Contributor User
Time Zone (GMT+05:30) India Standard Time (Asia/Kolkata)
Site.com Publisher User
Locale English (India)
WDC User
Language English
Mobile Push Registrations View
Delegated Approver
Data.com User Type
Manager
Accessibility Mode (Classic Only)
Receive Approval Request Emails Only if I am an approver
Debug Mode


Search Setup
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Last Name A
Alias sa
Email 2k20cse176@kiot.ac.in
Username 2k21cse176@kiot.ac.in
Nickname User169631476178576A938
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Company Male
Department
Division
Role <None Specified>
User License Salesforce Platform
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Offline User
Knowledge User
Flow User
Service Cloud User
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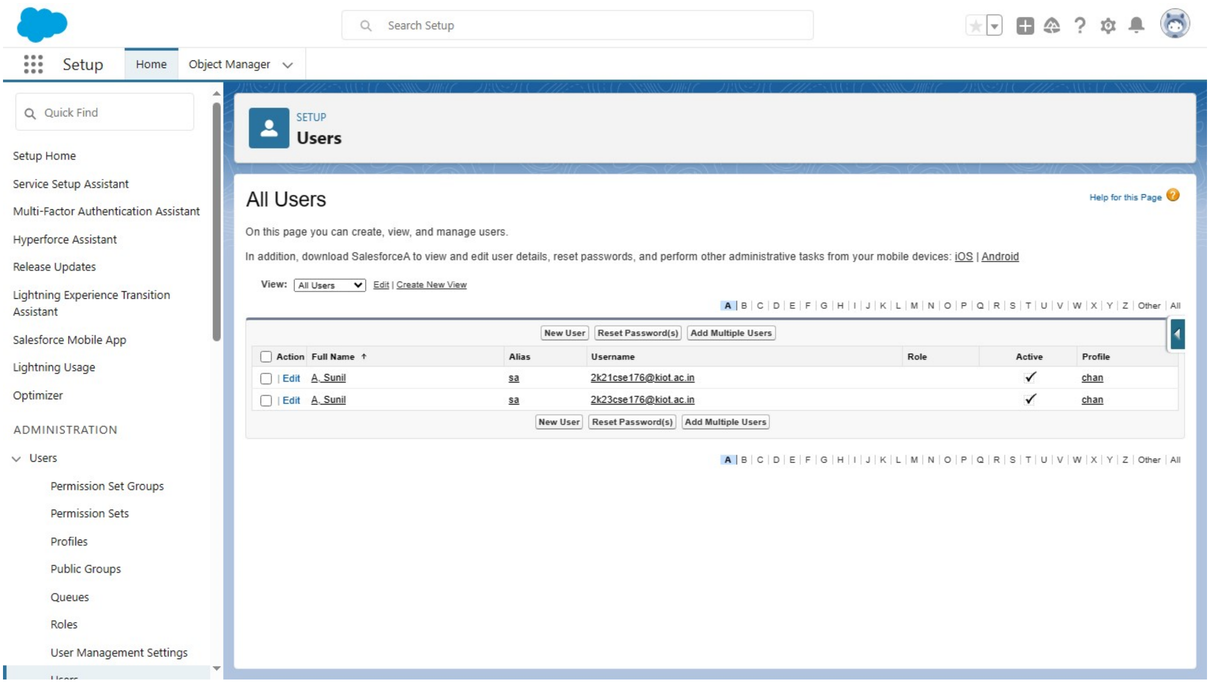
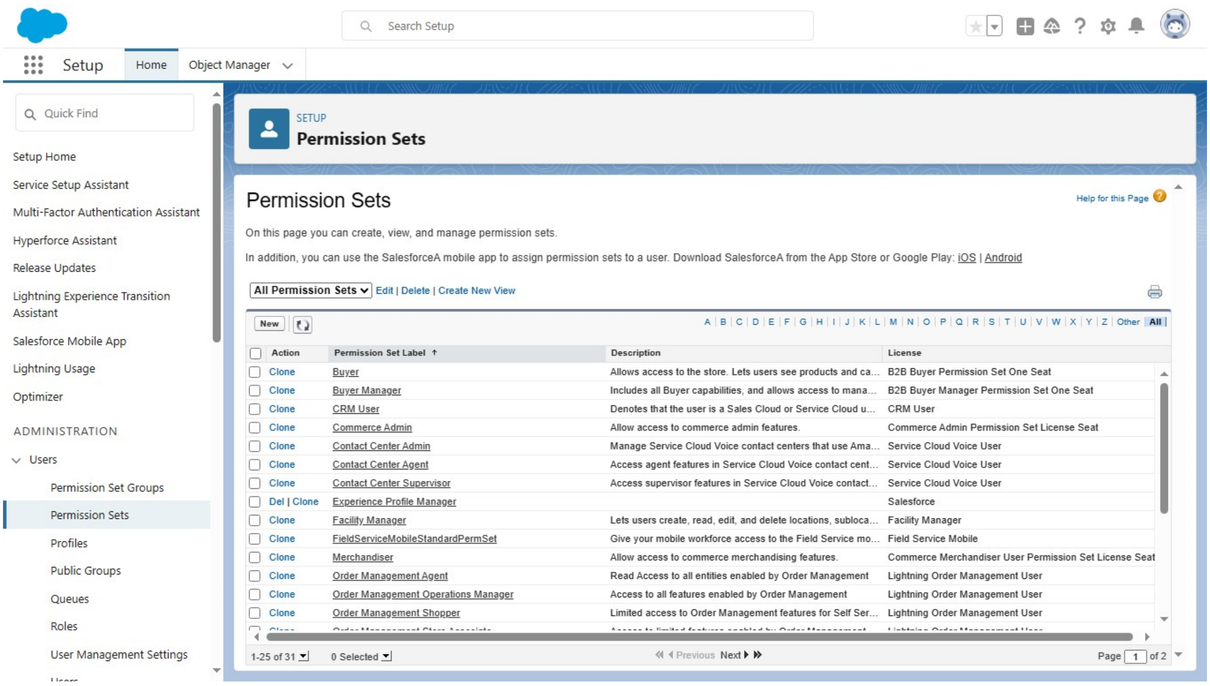
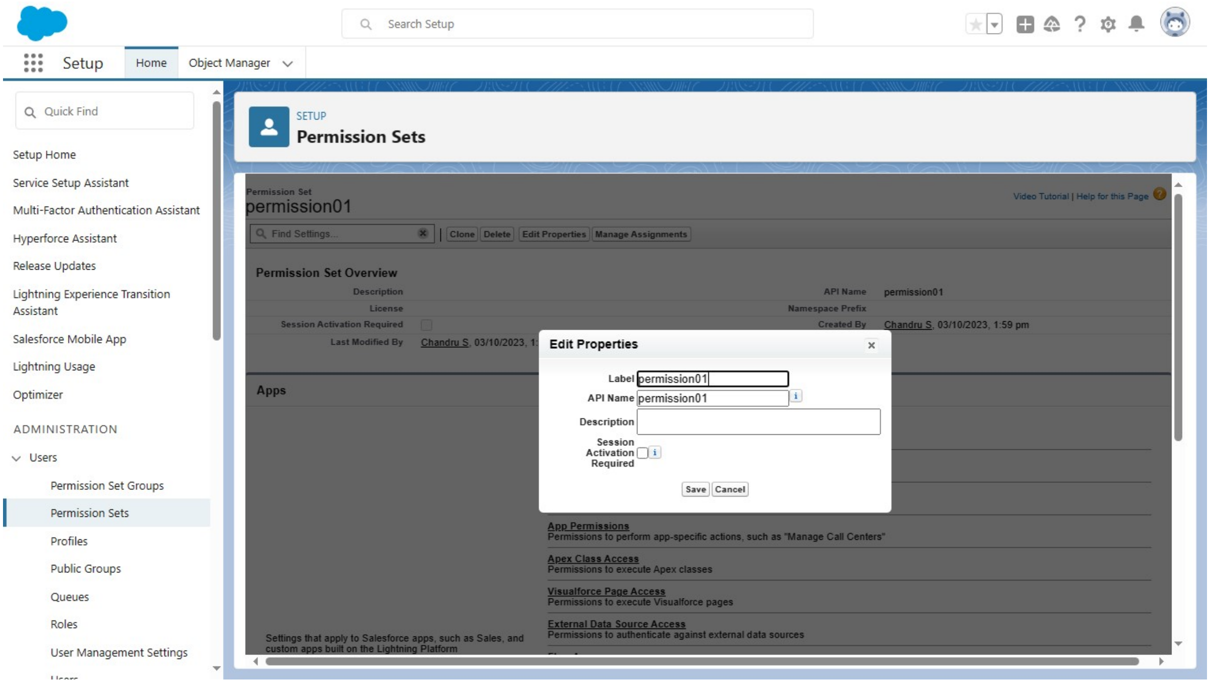
High-Contrast Palette on Charts



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

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Clone
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Session Activation Required
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Namespace Prefix
Created By
Chandru S, 03/10/2023, 1:59 pm
Apps
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API Name
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Description
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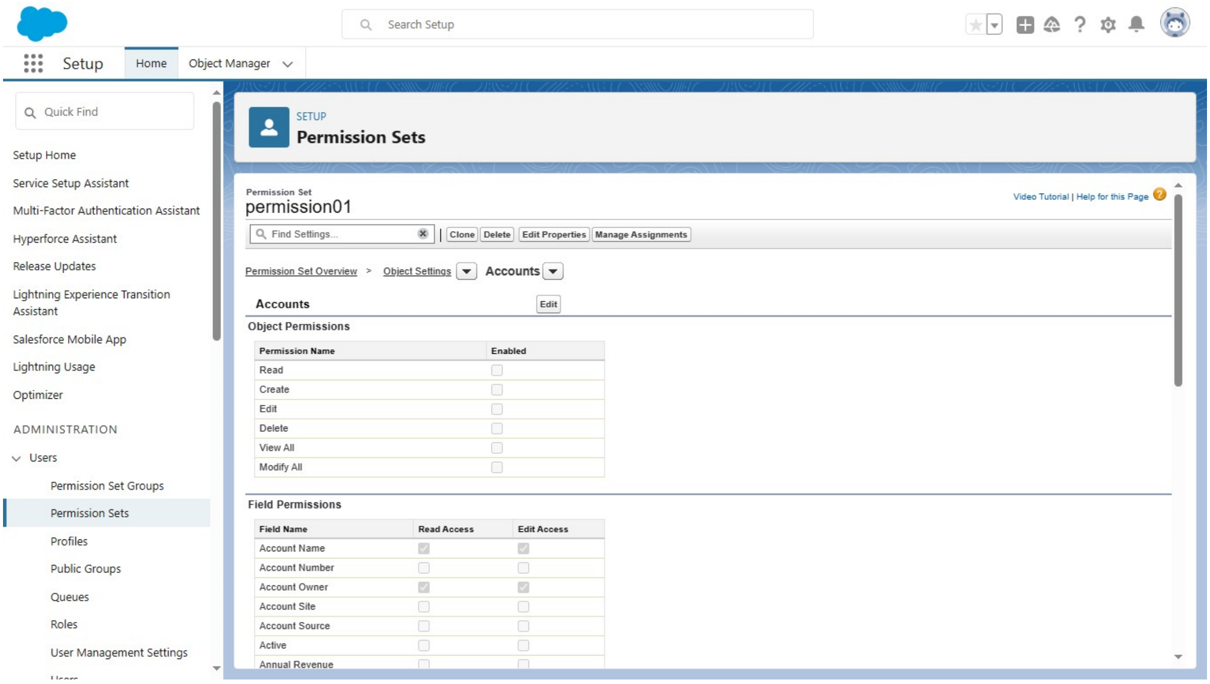
Cancel
App Permissions
Permissions to perform app-specific actions, such as "Manage Call Centers"
Apex Class Access
Permissions to execute Apex classes
Visualforce Page Access
Permissions to execute Visualforce pages
External Data Source Access
Permissions to authenticate against external data sources
Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform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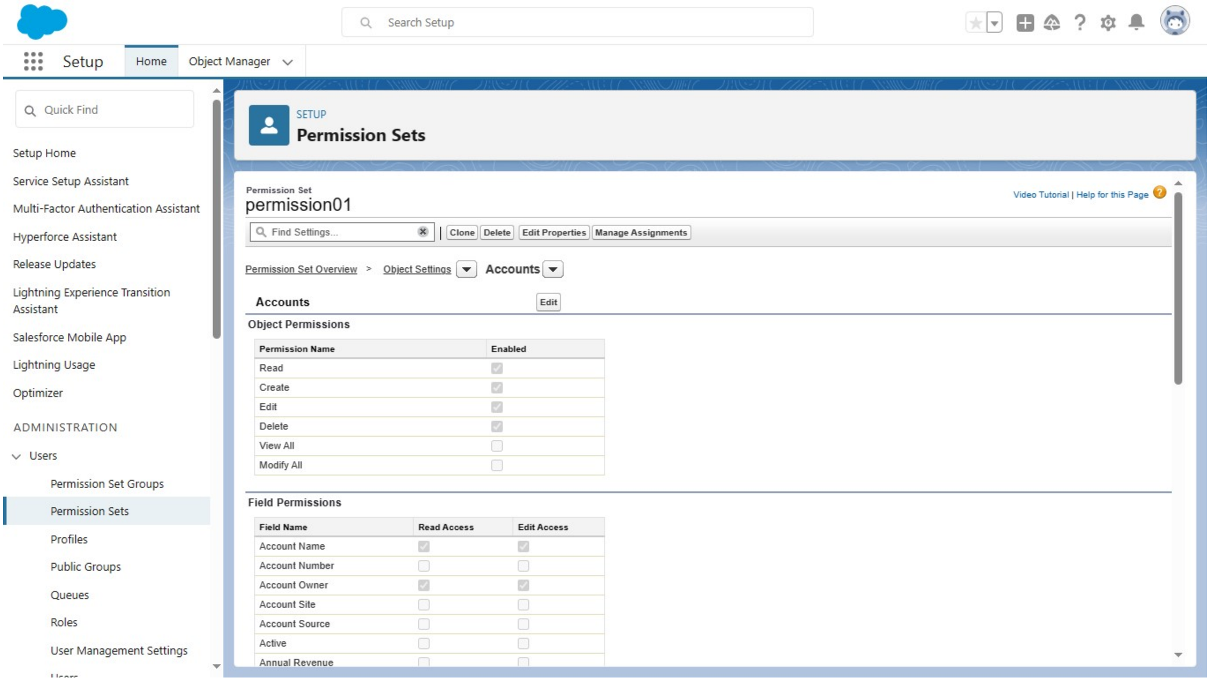
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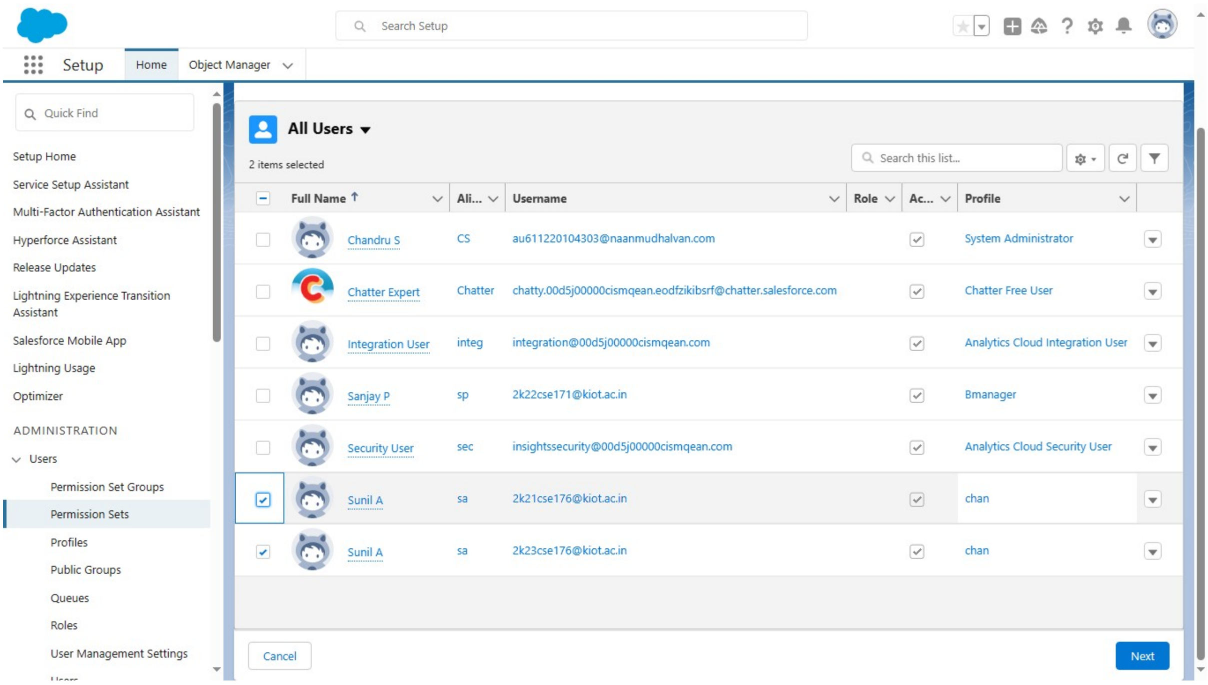
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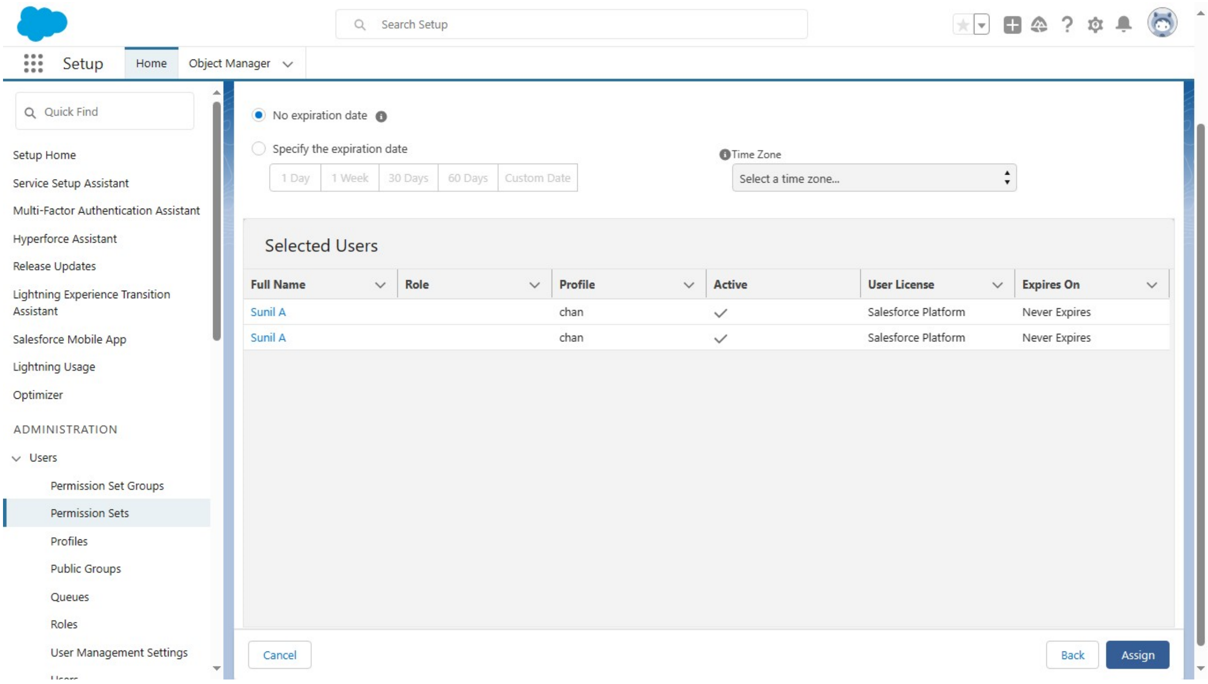

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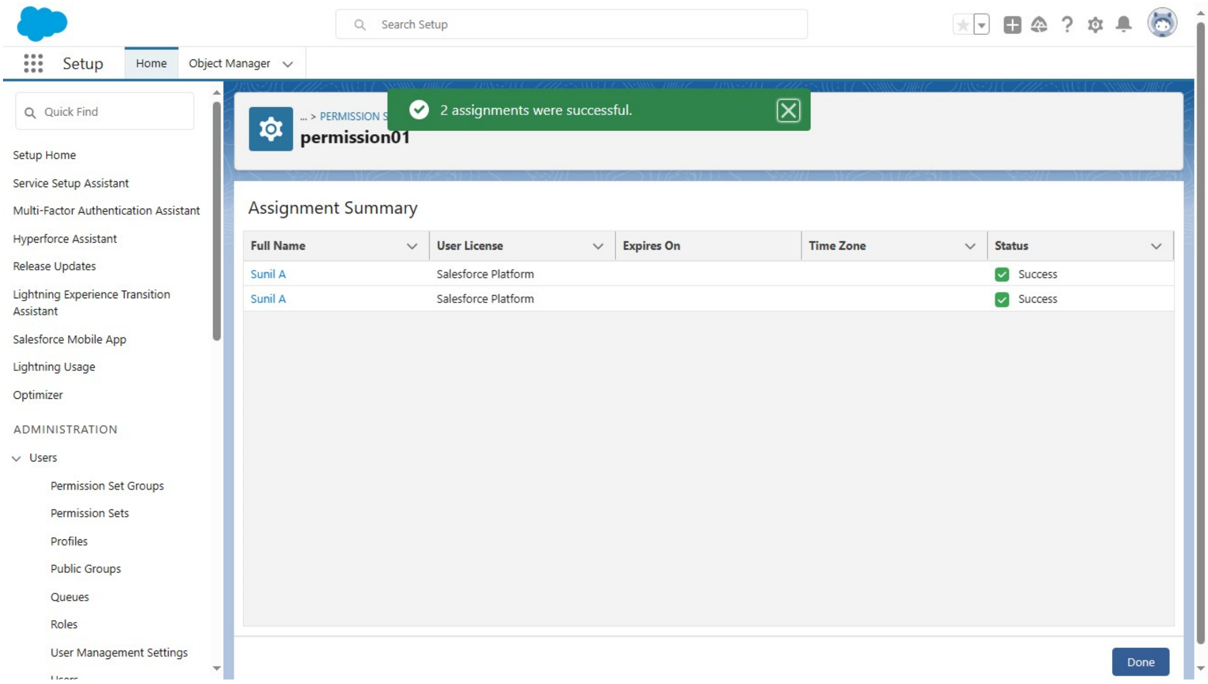


4.Create a screen flow for a basic survey to fill in the details for any form.

Step 1: Access Lightning Flow Builder

- Log in to your Salesforce account.
- Click on the "App Launcher" (grid icon) in the upper-left corner and search for "Flow."
- Click on "Flows" under "Process Automation" to access Lightning Flow Builder.

Step 2: Create a New Flow

- Click on the "New Flow" button.
- Give your flow a name, such as "Survey Flow."
- Choose the "Screen Flow" option, as you'll be using screens to gather survey information.

- Click on the "Create" button.

Step 3: Add a Screen Element
In your survey flow, you'll use screen elements to collect user input.

- In the Flow canvas, drag and drop a "Screen" element from the palette on the left onto the canvas.
- Double-click on the screen element to configure it.
- In the "Label" field, provide a title for your survey screen, like "Survey Introduction."
- Add any explanatory text in the "Screen Help Text" field if needed.
- Click the "Next" button to move to the next screen element or create a new screen for the first question.

Step 4: Add Survey Questions
For each survey question, you'll create a new screen element:

- Drag and drop a "Screen" element onto the canvas for the first question.
- Configure the screen element by giving it a label, like "Question 1," and providing the question text in the "Screen Help Text" field.
- Add input fields or components that correspond to your survey question. For example, you can use "Text" components for short text answers, "Radio Buttons" for single-choice questions, or "Checkboxes" for multiple-choice questions.
- Set variables to capture the responses. For each input field, click on it, go to the "General Info" section, and assign it to a new or existing variable.
- Click the "Next" button to add more questions/screens as needed.

Step 5: Add a Finish Screen
Once you've added all survey questions, create a finish screen to thank the user and end the flow:

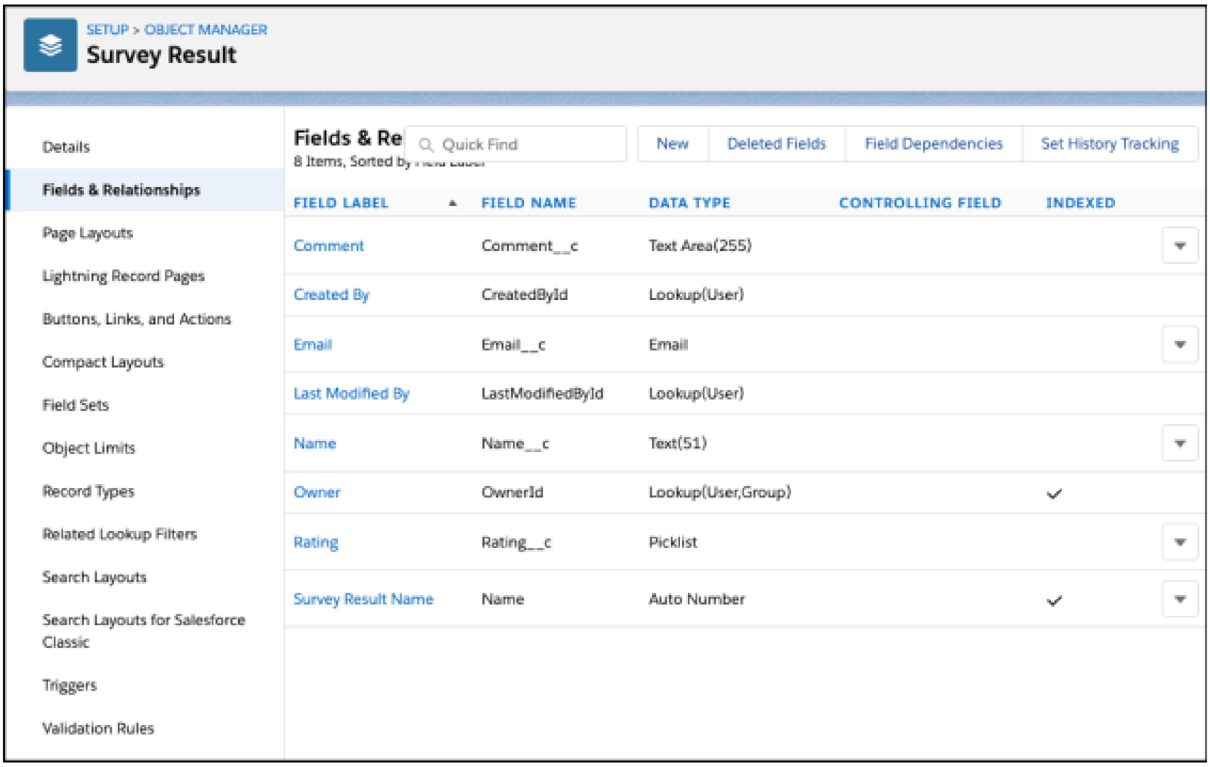
- Drag and drop a "Screen" element onto the canvas.
- Configure the screen by providing a label (e.g., "Survey Complete") and adding a thank-you message.

Step 6: Connect the Screens
Connect the screens in your flow by using the "Next" button on each screen element to specify the logical flow of the survey. Ensure that the user progresses through the questions in the desired order.
Step 7: Activate the Flow

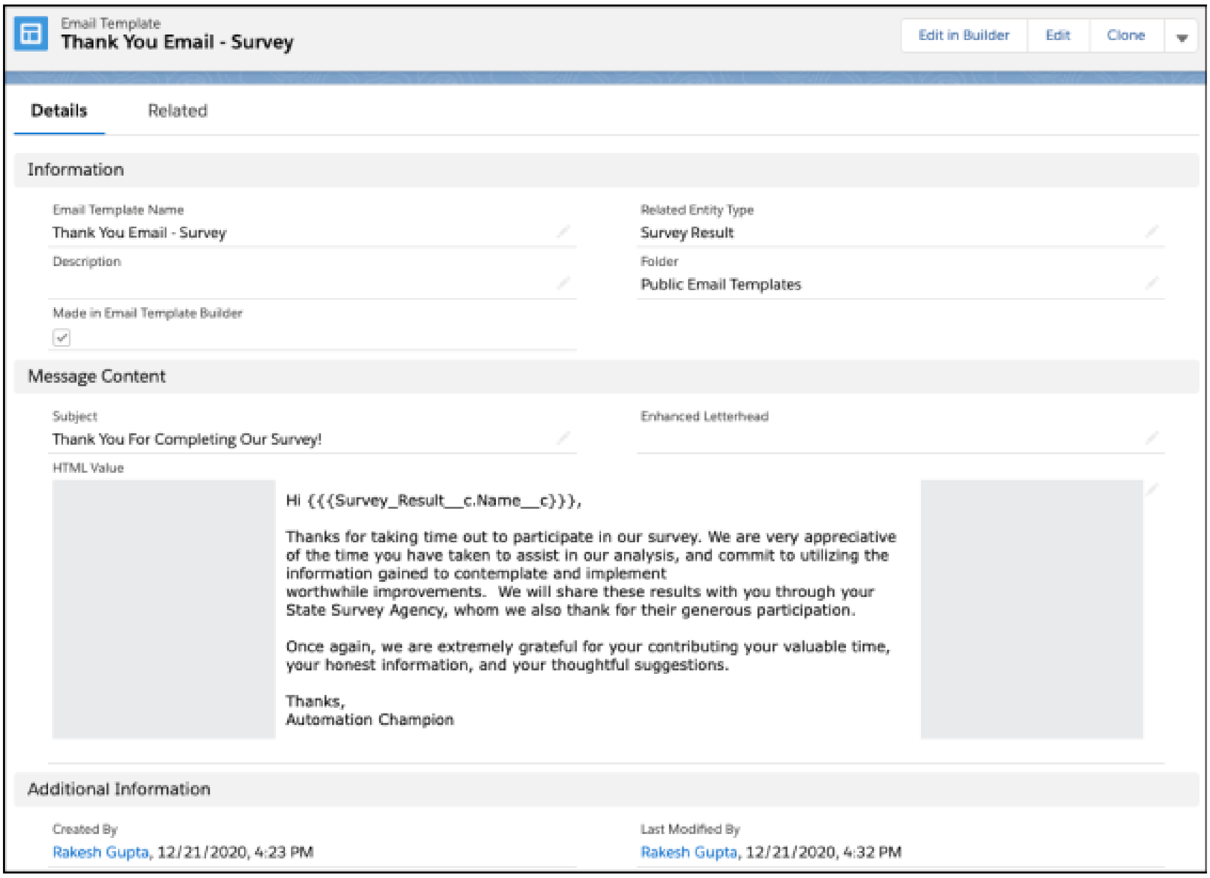
- Click on the "Activate" button in the top-right corner of the Flow Builder to make your survey flow available for use.

Step 8: Embed the Flow
To make the survey accessible to users, you can embed it on a Lightning Record Page, a Visualforce page, or a Lightning App Builder page, depending on your Salesforce setup and requirements.

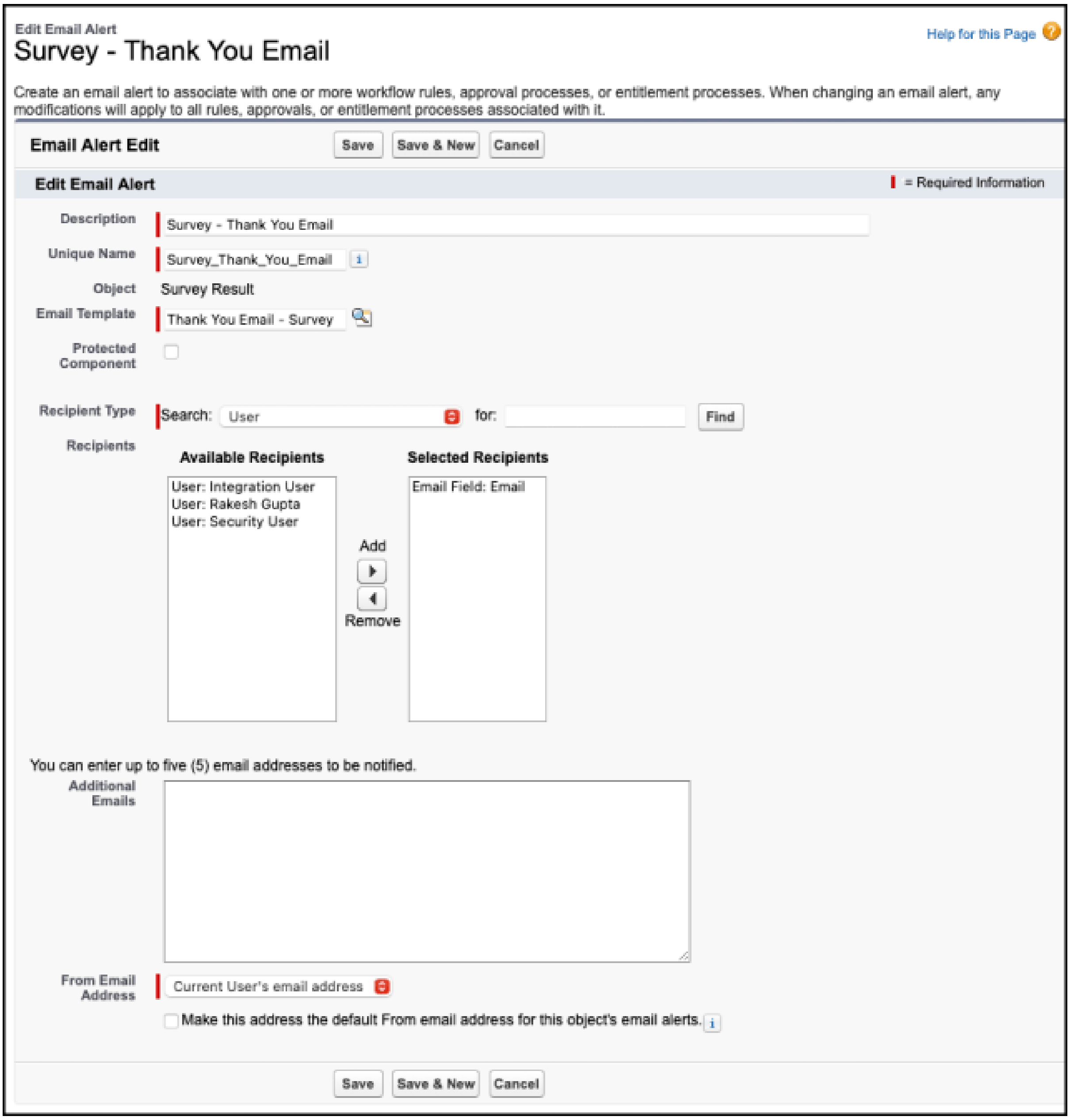
Step 1: Create a custom object



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

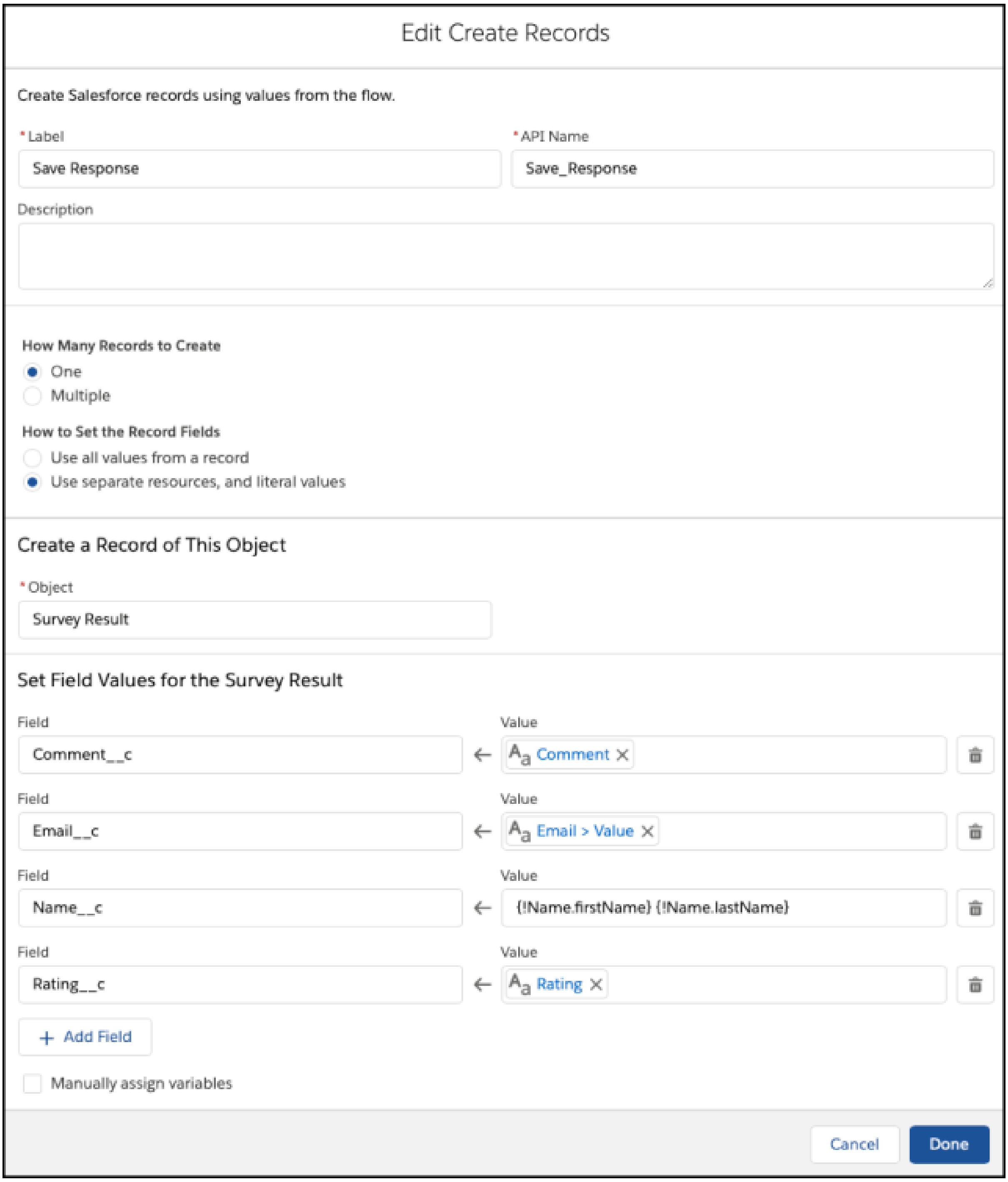


Step 3: Create an Email Alert

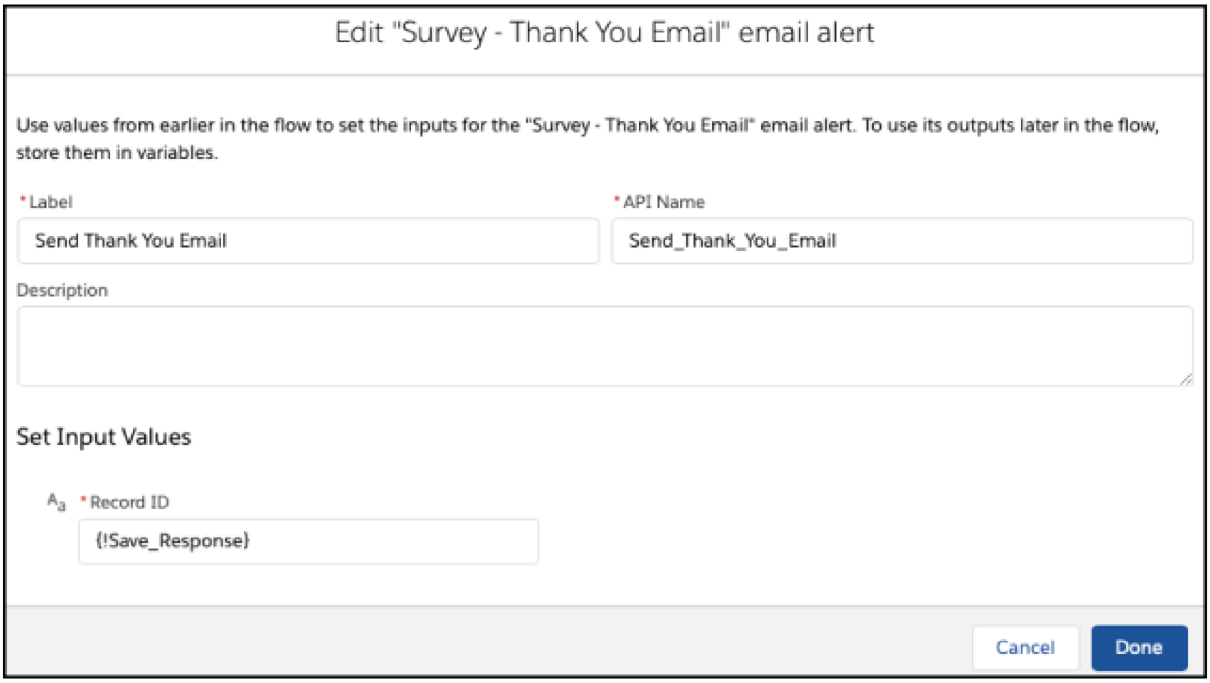

Edit Email Alert
Survey - Thank You Email
Help for this Page
Create an email alert to associate with one or more workflow rules, approval processes, or entitlement processes. When changing an email alert, any modifications will apply to all rules, approvals, or entitlement processes associated with it.
Email Alert Edit
Save
Save & New
Cancel
Edit Email Alert
= Required Information
Description
Survey - Thank You Email
Unique Name
Survey_Thank_You_Email
Object
Survey Result
Email Template
Thank You Email - Survey
Protected Component
Recipient Type
Search:
User
for:
Find
Recipients
Available Recipients
User: Integration User
User: Rakesh Gupta
User: Security User
Add
Remove
Selected Recipients
Email Field: Email
You can enter up to five (5) email addresses to be notified.
Additional Emails
From Email Address
Current User's email address
Make this address the default From email address for this object's email alerts.
Save
Save & New
Cancel

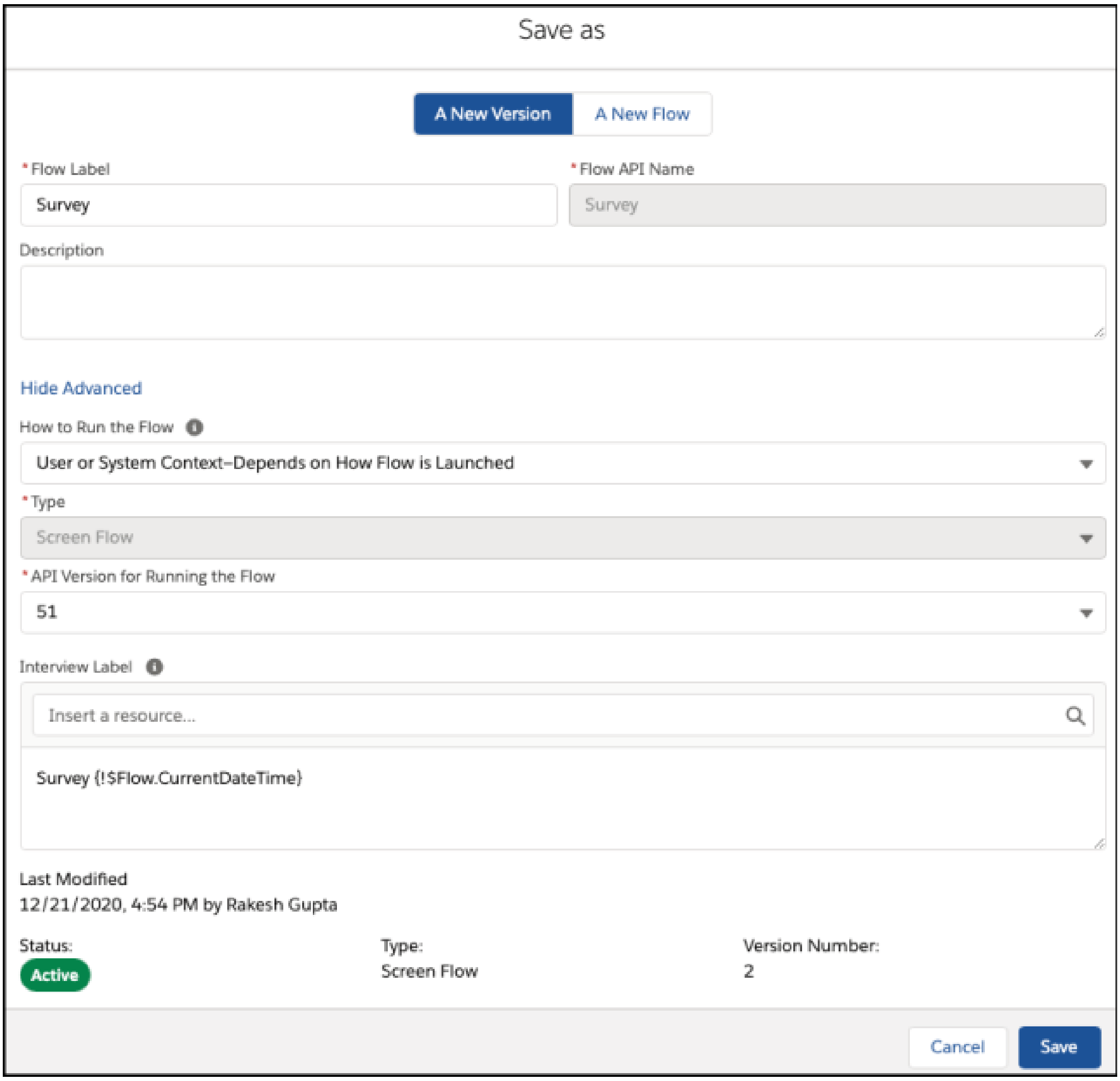
Step 4: Salesforce Flow – Create a Screen that Allow

Users to Fill Sur



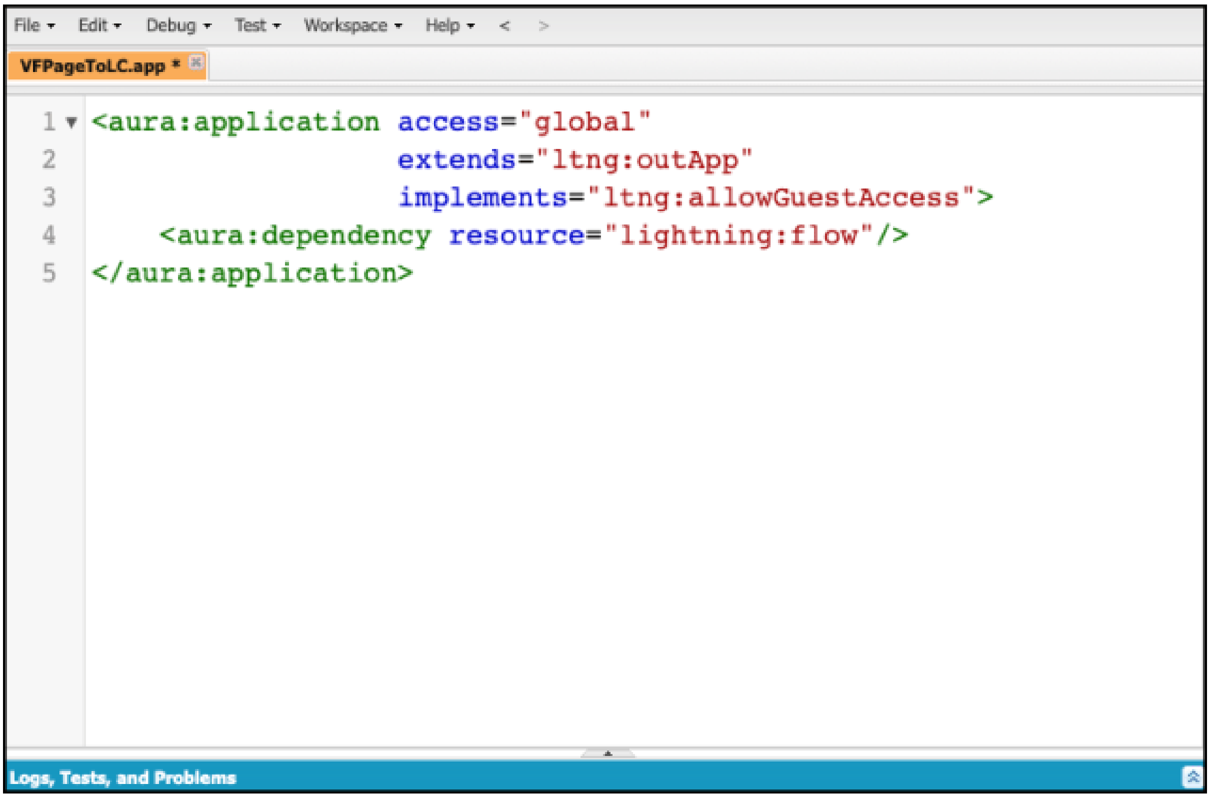
Step 5: Salesforce Flow – Call an Acton – Email Alert to Send Out Thank You Email

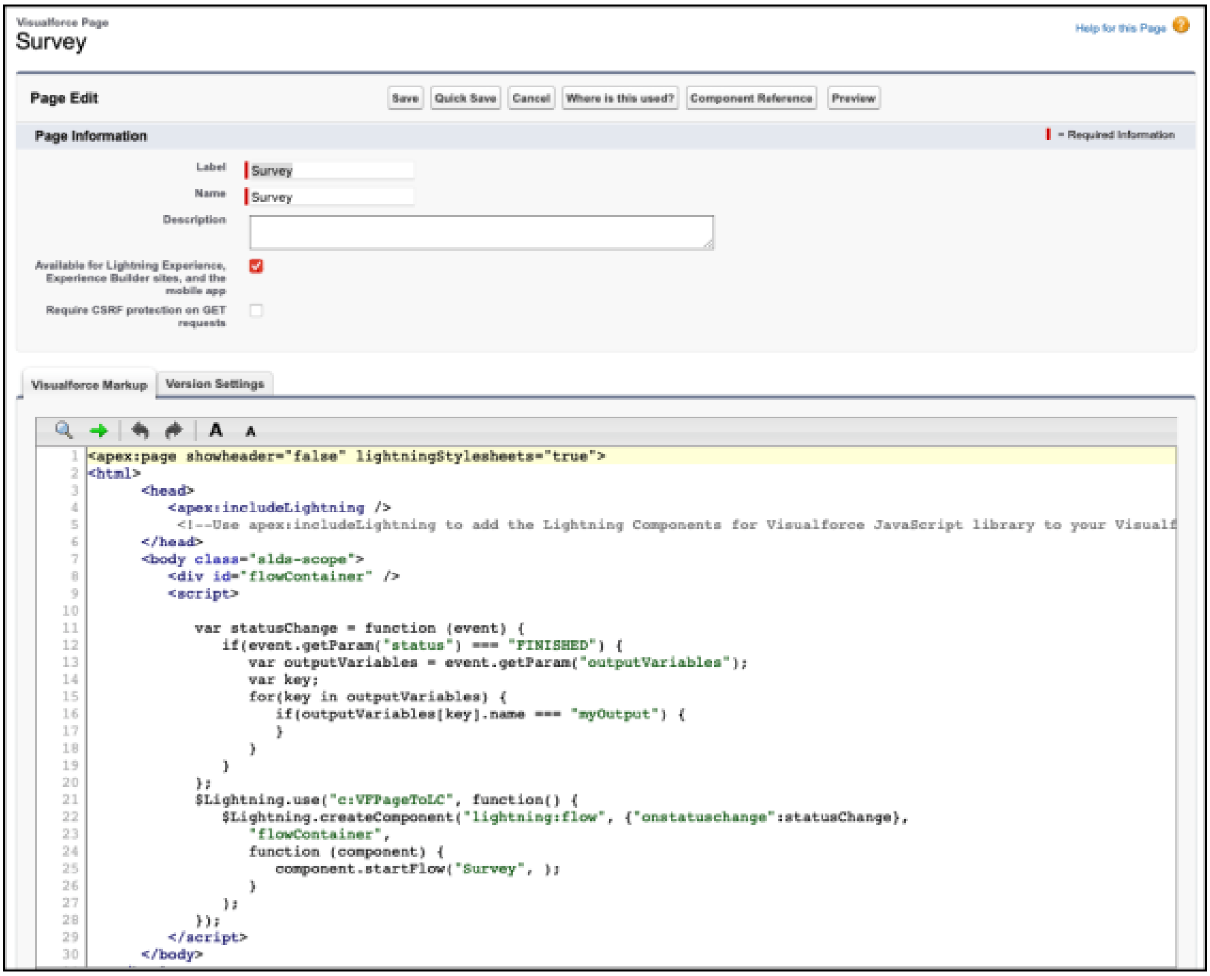

Edit "Survey - Thank You Email" email alert
Use values from earlier in the flow to set the inputs for the "Survey - Thank You Email" email alert. To use its outputs later in the flow, store them in variables.
* Label
Send Thank You Email
* API Name
Send_Thank_You_Email
Description
Set Input Values
*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


Save as
A New Version
A New Flow
* Flow Label
Survey
* Flow API Name
Survey
Description
Hide Advanced
How to Run the Flow
User or System Context–Depends on How Flow is Launched
* Type
Screen Flow
* API Version for Running the Flow
51
Interview Label
Insert a resource...
Survey {!$Flow.CurrentDateTime}
Last Modified
12/21/2020, 4:54 PM by Rakesh Gupta
Status:
Active
Type:
Screen Flow
Version Number:
2
Cancel
Save

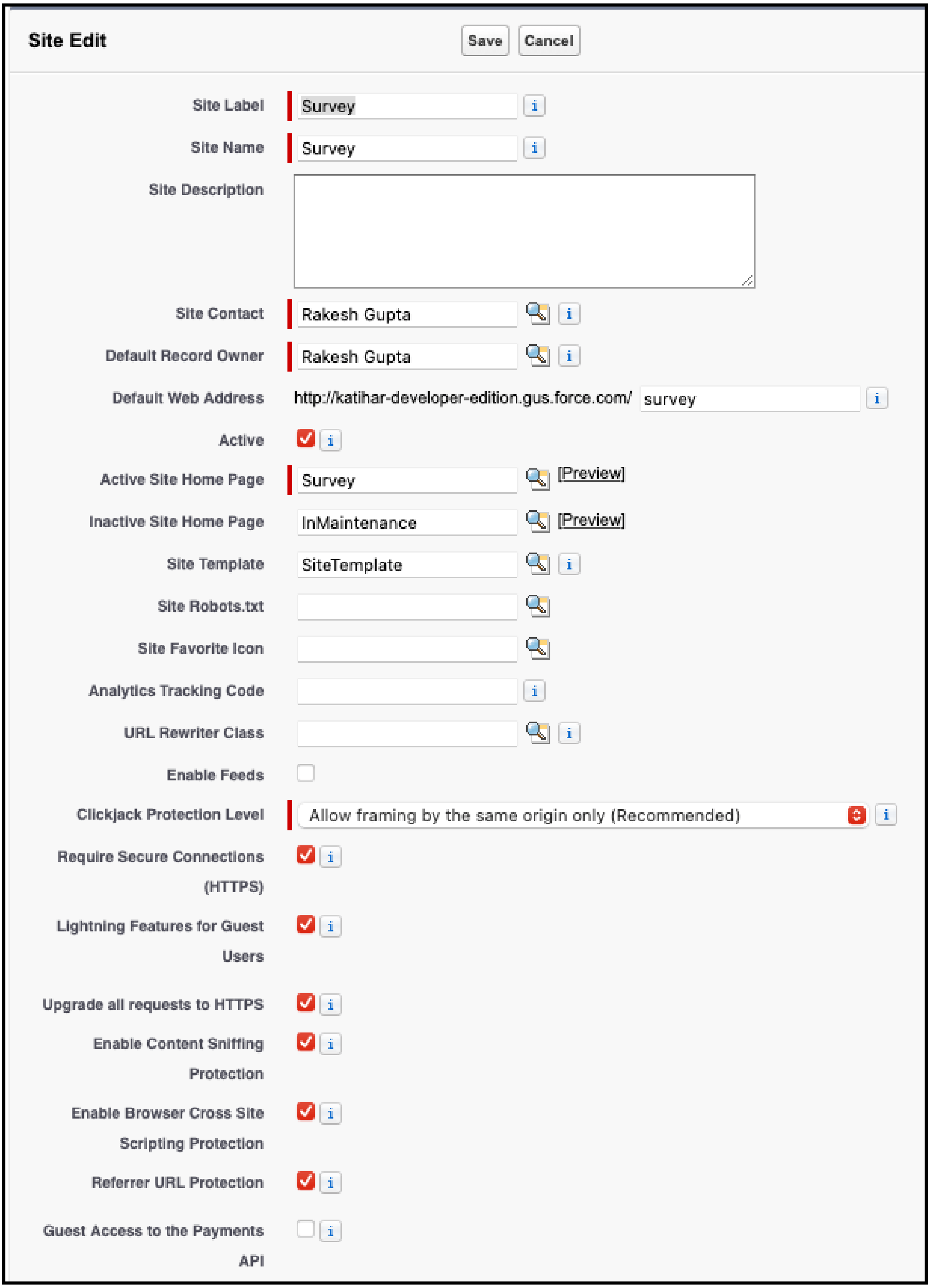
Step 6: Create a Lightning Application to Render Lightning

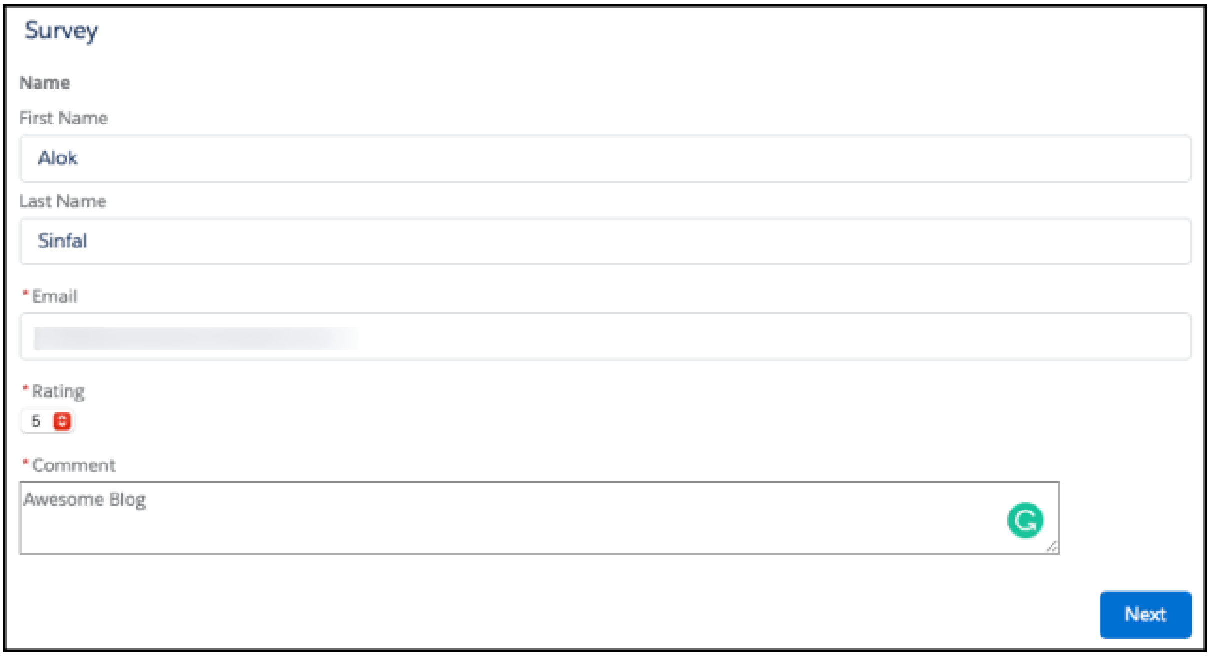
Runtime for Flow in a Visualforce Page


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


Site Edit
Save
Cancel
Site Label
Survey
Site Name
Survey
Site Description
Site Contact
Rakesh Gupta
Default Record Owner
Rakesh Gupta
Default Web Address
http://katihar-developer-edition.gus.force.com/
survey
Active
Active Site Home Page
Survey
[Preview]
Inactive Site Home Page
InMaintenance
[Preview]
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


Survey
Name
First Name
Alok
Last Name
Sinfal
*Email
*Rating
5
*Comment
Awesome Blog
Next