

## ASSIGNMENT 1

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

I have created a salesforce lightning app named Organisation.

I have created some custom objects: Students, Accounts, Activities and Classes.

The screenshot shows the Salesforce Lightning interface for the 'Students' object. The 'Recently Viewed' list displays 7 items, updated a few seconds ago. The list includes a search bar and various action icons. The table below shows the details of the 7 items:

	Name
1	S.Harini
2	S.Abarna
3	Jose
4	Umesh
5	Kesav
6	S.Akshaya
7	S.Muthuveni

### Master-Detail relationship between Student object and Class object:

The screenshot shows the Salesforce Setup page for the 'Student' object. The 'Fields & Relationships' section is expanded, showing a list of fields and their relationships. A red arrow points to the 'Class' field, which is a Master-Detail relationship with the 'Class' object.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Activity	Activity__c	Roll-Up Summary (COUNT Activity)		
Address	Address__c	Text Area(255)		
Class	Class__c	Master-Detail(Class)		✓
College Name	College_Name__c	Text(50)		
Country	Country__c	Text(25)		
Created By	CreatedById	Lookup(User)		

The screenshot shows the Salesforce Lightning interface for a 'Class C-02' record. The top navigation bar includes 'Organisation', 'Home', 'Students', 'Accounts', 'Activities', and 'Classes'. The 'Classes' tab is selected. The record page has a 'Related' section on the left with 'Notes & Attachments (0)' and 'Students (3)'. The 'Students' list shows two students: S.Abarna and S.Akshaya. The 'Activity' section on the right shows filters and a message: 'No activities to show. Get started by sending an email, scheduling a task, and more.'

## Roll Up Summary Field to Calculate total number of records:

I have created the Roll up summary field for the student object with the count of Activities in the Activity object.

The screenshot shows the Salesforce Setup - Object Manager - Student Fields & Relationships page. The table lists 14 items, sorted by Field Label. The 'Activity' field is highlighted with a red arrow. The table columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Activity	Activity__c	Roll-Up Summary (COUNT Activity)		
Address	Address__c	Text Area(255)		
Class	Class__c	Master-Detail(Class)		✓
College Name	College_Name__c	Text(50)		
Country	Country__c	Text(25)		
Created By	CreatedById	Lookup(User)		

Student | S.Harini

Phone number: 6374402097

Activity: 1

Gender: Female

Address: 22-B, Mavadi street, Cheranmahadevi.

State: Tamil nadu

College Name: PSN ITS

Country: India

Class: C-01

No past activity. Past meetings and tasks marked as done show up here.

**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**

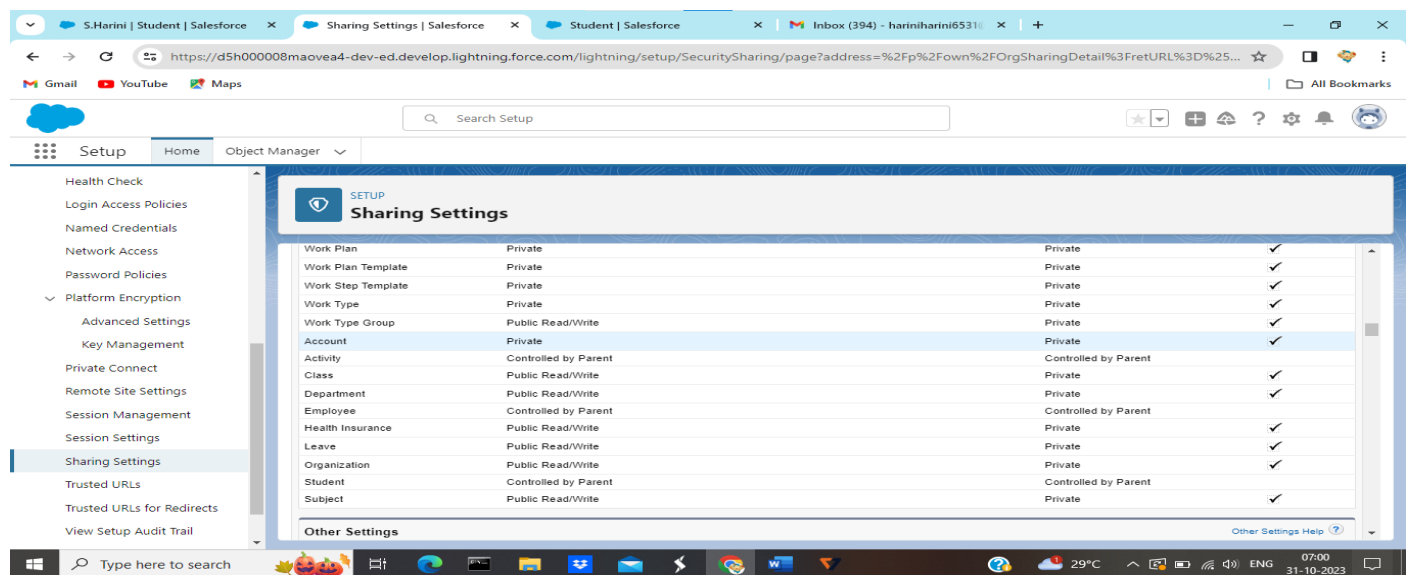
I have created two users namely S.Kalai(User A) and S.Durga Devi(User B).

Setup | Users

View: All Users | Edit | Create New View

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter_Expert	Chatter	chatty.00d5h000008maovea4_ewbhteb3ht1d@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	Devi_Durga	ddevi	dd22@gmail.com		✓	Staff
<input type="checkbox"/> Edit	Jone_Dave	dione	dora1@gmail.com	SVP_Sales & Marketing	✓	Standard Platform User
<input type="checkbox"/> Edit	Marc_Racheal	rmarc	bi1@gmail.com	SVP_Human Resources		Standard Platform User
<input type="checkbox"/> Edit	Marc_Racheal	RMarc	molu2023@gmail.com	SVP_Human Resources		Standard Platform User
<input type="checkbox"/> Edit	S_Harini	HS	hariniharini6531@gmail.com		✓	System Administrator
<input type="checkbox"/> Edit	S_Kalai	ks	ks31@gmail.com		✓	Staff
<input type="checkbox"/> Edit	User_Integration	inteo	integration@00d5h000008maovea4.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightssecurity@00d5h000008maovea4.com		✓	Analytics Cloud Security User

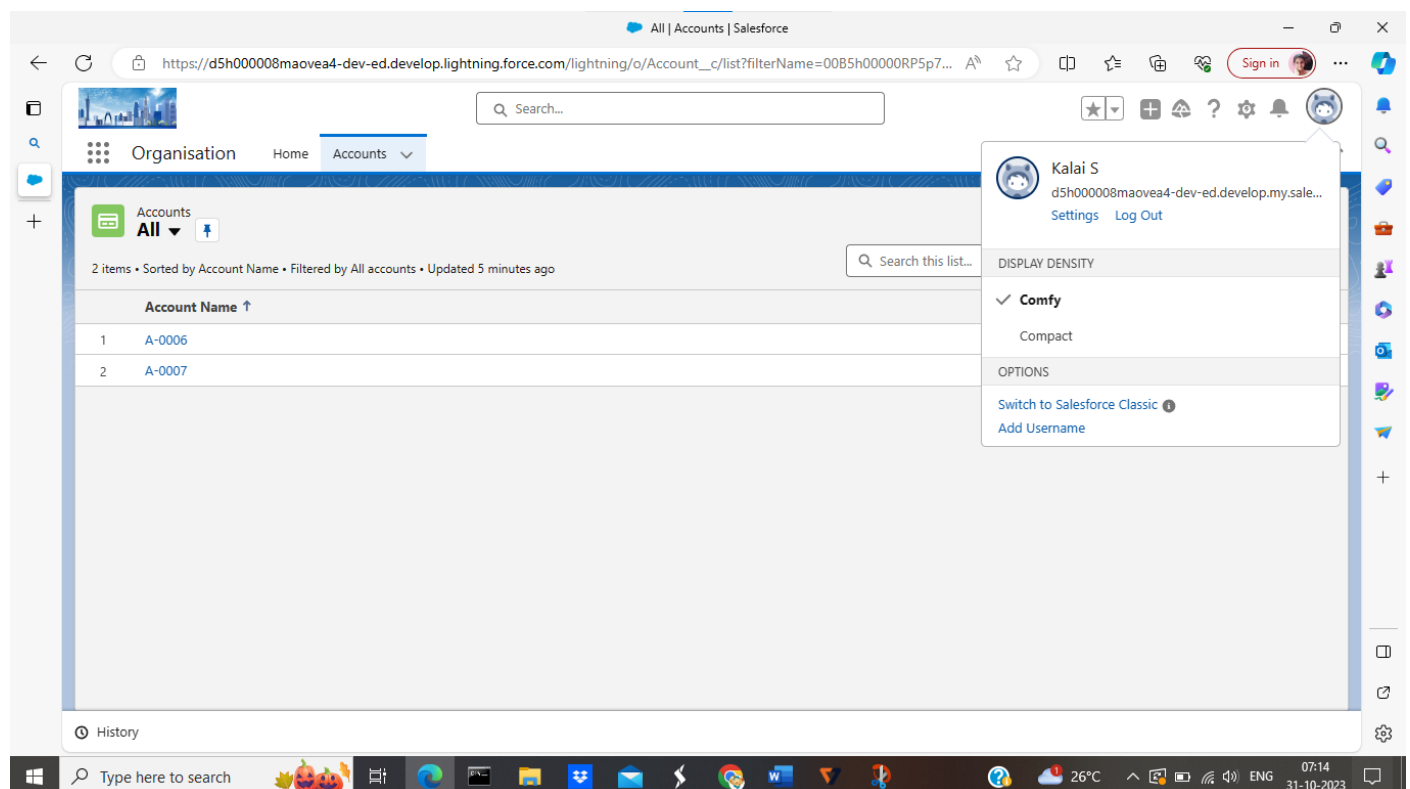
In the sharing settings, in Default Internal Access, I choose private for the account object. So that, that User A should not see the User B Record and user B should not see User A record.



The screenshot shows the Salesforce Setup page for Sharing Settings. The left sidebar contains a navigation menu with options like Health Check, Login Access Policies, Named Credentials, Network Access, Password Policies, Platform Encryption, Advanced Settings, Key Management, Private Connect, Remote Site Settings, Session Management, Session Settings, Sharing Settings (selected), Trusted URLs, Trusted URLs for Redirects, and View Setup Audit Trail. The main content area is titled 'Sharing Settings' and displays a table of sharing settings for various objects. The 'Account' object is highlighted, showing its sharing settings as 'Private'.

Object	Sharing Model	Default Internal Access	Checkmark
Work Plan	Private	Private	✓
Work Plan Template	Private	Private	✓
Work Step Template	Private	Private	✓
Work Type	Private	Private	✓
Work Type Group	Public Read/Write	Private	✓
Account	Private	Private	✓
Activity	Controlled by Parent	Controlled by Parent	
Class	Public Read/Write	Private	✓
Department	Public Read/Write	Private	✓
Employee	Controlled by Parent	Controlled by Parent	
Health Insurance	Public Read/Write	Private	✓
Leave	Public Read/Write	Private	✓
Organization	Public Read/Write	Private	✓
Student	Controlled by Parent	Controlled by Parent	
Subject	Public Read/Write	Private	✓

The below seen Account object belongs to User A (S.Kalai)



The screenshot shows the Salesforce Accounts list view. The top navigation bar includes 'Organisation', 'Home', and 'Accounts'. The main content area displays a list of accounts with columns for 'Account Name' and 'Account ID'. Two accounts are visible: 'A-0006' and 'A-0007'. A user profile dropdown menu is open on the right, showing the user's name 'Kalai S', their email address, and options for 'Settings' and 'Log Out'. The menu also includes a 'DISPLAY DENSITY' section with 'Comfy' selected and 'Compact' as an option, and an 'OPTIONS' section with 'Switch to Salesforce Classic' and 'Add Username'.

Account Name	Account ID
A-0006	
A-0007	

The below seen Account object belongs to User B (S.Durga Devi)

The screenshot shows the Salesforce interface for a user named Durga Devi. The browser address bar indicates the URL: `https://d5h000008maovea4-dev-ed.develop.lightning.force.com/lightning/o/Account__c/list?filterName=Recent`. The page title is 'Recently Viewed | Accounts'. The 'Accounts' section shows '1 item • Updated 6 minutes ago'. The table lists one account with the name 'A-0005'. A user profile dropdown is open, showing the user's name 'Durga Devi', email 'd5h000008maovea4-dev-ed.develop.my.sale...', and options for 'Settings' and 'Log Out'. The dropdown also shows 'DISPLAY DENSITY' options: 'Comfy' (selected), 'Compact', and 'OPTIONS' including 'Switch to Salesforce Classic' and 'Add Username'.

Hence User A should not see the User B Record and user B should not see User A record.

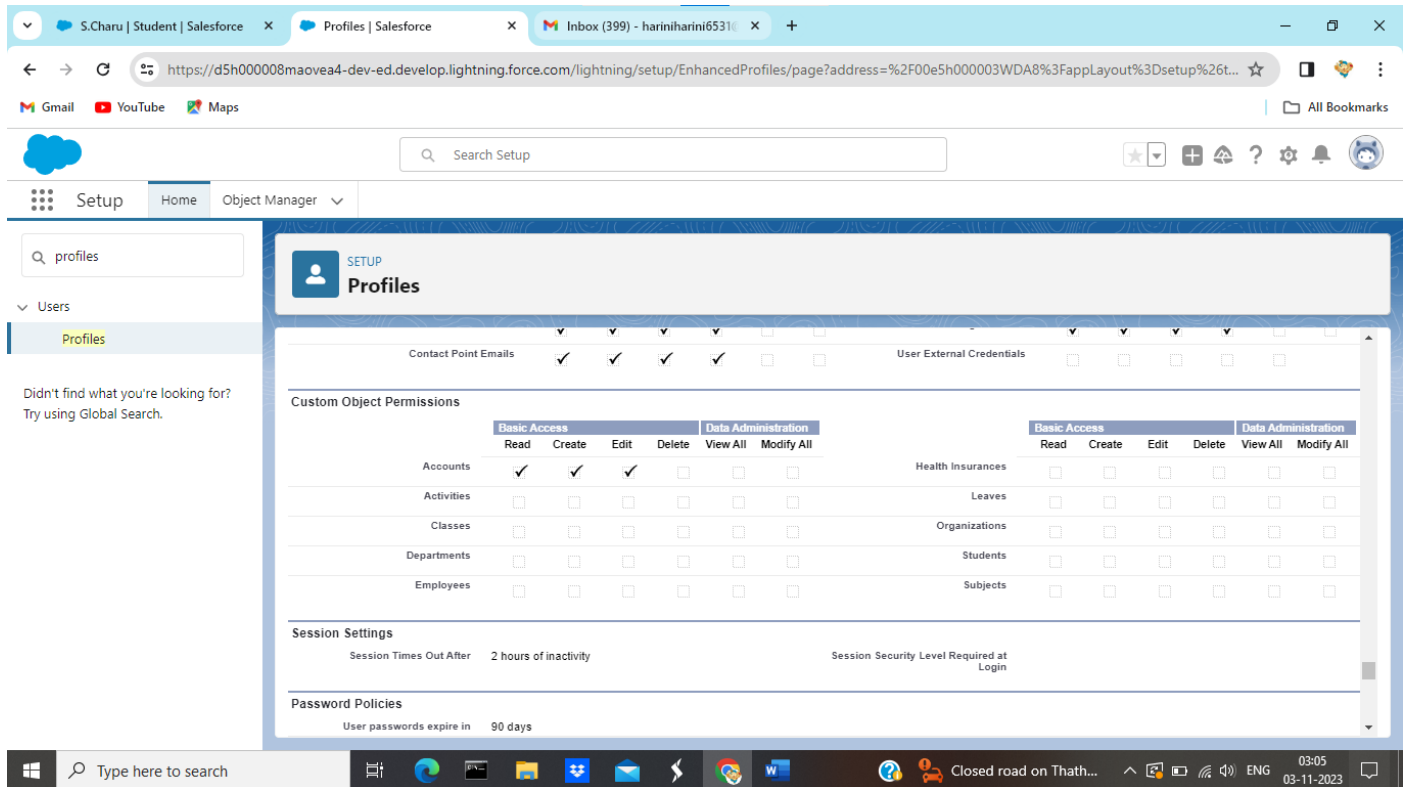
**3. Suppose there are 2 Users and they are having Create, Read, Edit access on Account Object with the same profile but we want to open up the access for one user to delete how will you implement the Security setting.**

I have created two users with the same profile named staff and they have create, read and edit access on Account object.

The screenshot shows the Salesforce Setup page for 'Users'. The left sidebar shows the navigation menu with 'Users' selected. The main content area displays a table of users. The table has columns: Action, Full Name, Alias, Username, Role, Active, and Profile. Two users are highlighted with red arrows: 'S. Harini' and 'S. Kalai', both with the 'Staff' profile. The table also includes buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'.

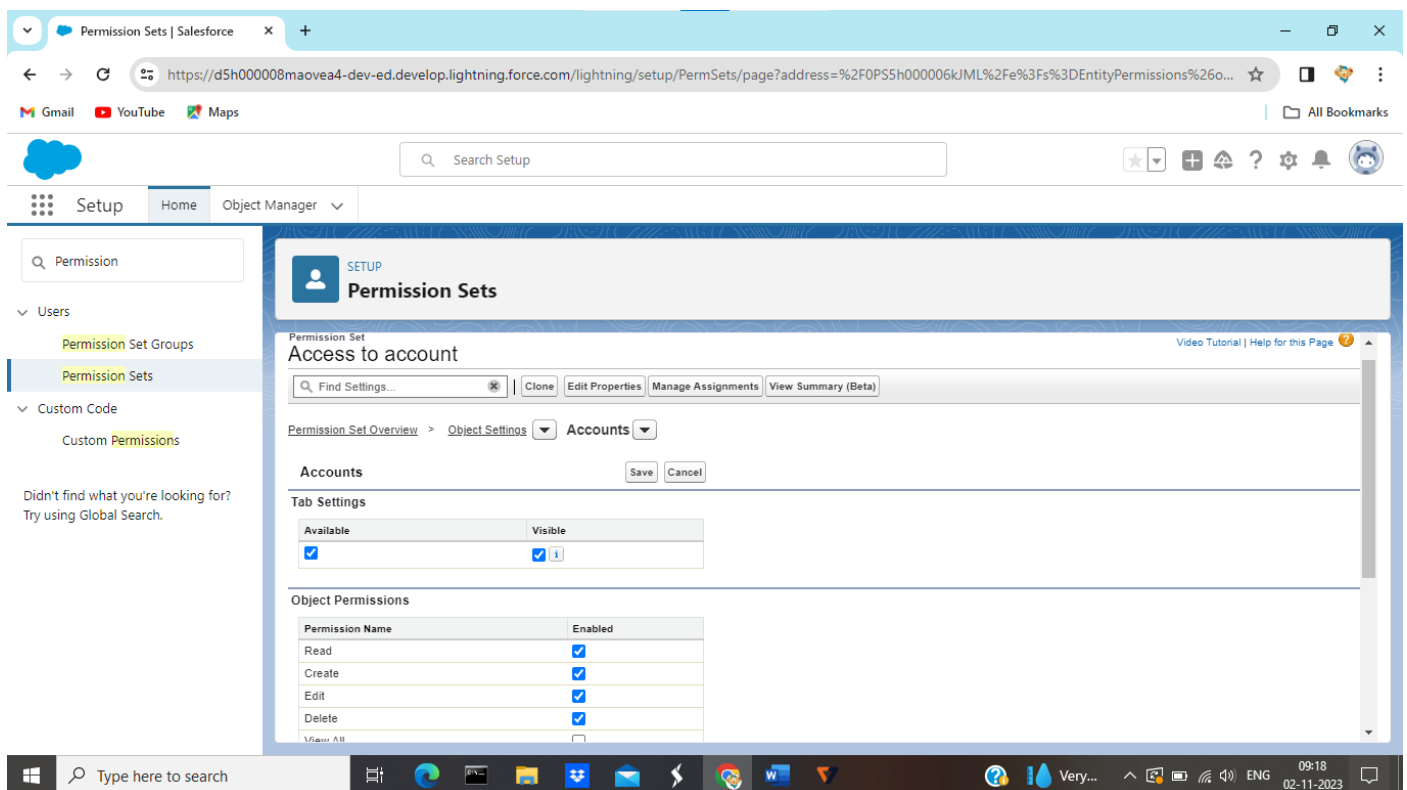
Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatter.00d5h000008maovea4_ewbhteb3ht1d@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	Devi Durga	ddevi	dd22@gmail.com		✓	Staff
<input type="checkbox"/> Edit	Jone Dave	dione	dora1@gmail.com	SVP_Sales & Marketing	✓	Standard Platform User
<input type="checkbox"/> Edit	Marc Racheal	rmarc	bi1@gmail.com	SVP_Human Resources	✓	Standard Platform User
<input type="checkbox"/> Edit	Marc Racheal	RMarc	motu2023@gmail.com	SVP_Human Resources	✓	Standard Platform User
<input type="checkbox"/> Edit	S. Harini	HS	hariniharini531@gmail.com		✓	System Administrator
<input type="checkbox"/> Edit	S. Kalai	ks	ks31@gmail.com		✓	Staff
<input type="checkbox"/> Edit	User_Integration	inteo	integration@00d5h000008maovea4.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightsecurity@00d5h000008maovea4.com		✓	Analytics Cloud Security User

The two users have create, read and edit permissions with the same profile.



The screenshot shows the Salesforce Setup interface for the 'Profiles' page. The left sidebar contains a search bar and a navigation menu with 'Users' and 'Profiles' (selected). The main content area is titled 'SETUP Profiles' and includes a 'Contact Point Emails' section with checkboxes for various email types. Below this is the 'Custom Object Permissions' section, which contains two tables for 'Accounts' and 'Health Insurances'. Each table has columns for 'Basic Access' (Read, Create, Edit, Delete) and 'Data Administration' (View All, Modify All). The 'Accounts' table shows 'Read', 'Create', and 'Edit' permissions checked. The 'Health Insurances' table shows all permissions unchecked. Below the object permissions are 'Session Settings' (Session Times Out After: 2 hours of inactivity) and 'Password Policies' (User passwords expire in: 90 days). The bottom of the screen shows the Windows taskbar with the search bar and various application icons.

In the permission set, I gave the permission to use the delete access and assigned it to User(A). So that I open up the access for one user to delete.



The screenshot shows the Salesforce Setup interface for the 'Permission Sets' page. The left sidebar contains a search bar and a navigation menu with 'Users', 'Permission Set Groups', 'Permission Sets' (selected), and 'Custom Code'. The main content area is titled 'SETUP Permission Sets' and shows the 'Access to account' section. It includes a 'Find Settings...' search bar and buttons for 'Clone', 'Edit Properties', 'Manage Assignments', and 'View Summary (Beta)'. Below this is the 'Permission Set Overview' section, which has tabs for 'Object Settings' and 'Accounts' (selected). The 'Accounts' section has 'Save' and 'Cancel' buttons. Below this is the 'Tab Settings' section, which has a table with 'Available' and 'Visible' columns. The 'Available' column has a checked checkbox. Below this is the 'Object Permissions' section, which has a table with 'Permission Name' and 'Enabled' columns. The 'Enabled' column has checked checkboxes for 'Read', 'Create', 'Edit', and 'Delete'. The bottom of the screen shows the Windows taskbar with the search bar and various application icons.

Permission Sets | Salesforce

https://d5h000008maovea4-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/0PS5h000006kJML/PermissionSetAssignment/home

Search Setup

Setup Home Object Manager

Permission

Users

Permission Set Groups

Permission Sets

Custom Code

Custom Permissions

Didn't find what you're looking for? Try using Global Search.

Access to account

Current Assignments

Add Assignment

<input type="checkbox"/>	Full Name ↑	Active	Role	Profile	User License	Expires On
<input type="checkbox"/>	Kalai S	✓		Staff	Salesforce Platform	

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

I have created a screen flow named Student record to Class record.

Flows | Salesforce

Student record to class record

Inbox (395) - hariniharini6531

https://d5h000008maovea4-dev-ed.develop.lightning.force.com/builder\_platform\_interaction/flowBuilder.app?flowId=3015h00000jWkDAAU

Flow Builder Student record to class record - V1

Select Elements Auto-Layout Version 1: Active—Last modified 24 days ago Run Debug Deactivate Save As Save

Screen Flow Start

Student form Screen

Mapping the fields Create Records

End

I have created one option “Record Merging”. In that , we can create any records for the Student object for the particular records in class object regarding to the flow created. That created Student record will be reflected in the Student object with the particular relation with class object.

The screenshot shows the Salesforce interface for a Class record named 'C-01'. The URL in the browser is [https://d5h000008maovea4-dev-ed.develop.lightning.force.com/lightning/r/Class\\_\\_c/a055h00001c1Q8GAAU/view](https://d5h000008maovea4-dev-ed.develop.lightning.force.com/lightning/r/Class__c/a055h00001c1Q8GAAU/view). The record details show the Owner as 'Harini S.' and the Created By as 'Harini S.' on 08/10/2023 at 7:10 pm. A red arrow points to the 'RecordMerging' button in the top right corner of the record header. The 'Activity' section on the right shows 'No activities to show'.

I have created a student record named Charu in the class record named C-01 with the help of Record Merging option.

The screenshot shows the 'RecordMerging' dialog box open over the Class record 'C-01'. The dialog box contains the following fields:

- \* Name: S.Charu
- \* Register number: 952420104024
- \* Date of birth: 14-Nov-2001
- \* Email: charu@gmail.com

A 'Next' button is located at the bottom right of the dialog box. The background shows the same Class record details as the previous screenshot.



That created student record will be added in the student object with the class related with C-01.

The screenshot shows the Salesforce 'Students' list view. The page title is 'Students' and the sub-view is 'Recently Viewed'. There are 8 items in the list, updated a few seconds ago. A search bar is available with the text 'Search this list...'. The list contains the following students:

	Name	
1	<input type="checkbox"/> S.Charu	
2	<input type="checkbox"/> Umesh	
3	<input type="checkbox"/> S.Harini	
4	<input type="checkbox"/> S.Abarna	
5	<input type="checkbox"/> Jose	
6	<input type="checkbox"/> Kesav	
7	<input type="checkbox"/> S.Akshaya	
8	<input type="checkbox"/> S.Muthuveni	

A red arrow points to the first student, S.Charu. The bottom of the screen shows the Windows taskbar with the search bar and various application icons.

The screenshot shows the Salesforce 'Student' detail view for S.Charu. The page title is 'Student' and the sub-view is 'S.Charu'. There are buttons for 'New Contact', 'Edit', and 'New Opportunity'. The student's details are as follows:

Field	Value
Gender	Female
Address	35/474, Sunshine colony, Chennai.
State	Tamil nadu
College Name	PSN ITS
Country	India
Class	C-01

A red arrow points to the 'Class' field, which is set to 'C-01'. The bottom of the screen shows the Windows taskbar with the search bar and various application icons.