

Naan Mudhalvan
Salesforce Developer(Course)
Assignment no 1

Name :Sri Durganandhini G
Naan Mudhalvan id : au611420104078
Year & Dep : 4th year & CSE
Batch : 2024
Zone no : Zone 8


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

Solution:


Step 1: Create Custom Objects

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

4. Click the "New" button to create a new custom field.
5. Choose "Master-Detail Relationship" as the data type.
6. Enter a label for the relationship, e.g., "Department __c."
7. Choose " Department__c" as the related object.
8. Configure other settings as needed and click "Next."
9. Specify the field-level security and add it to relevant page layouts.
10. Click "Next" and "Save" to create the relationship.



[Setup](#)
[Home](#)
[Admin Manager](#)


CDepartment

Tools

- Home & Relationships
- Relationships
- Lightning Record Page
- Actions, Links, and Actions
- Compact Layout
- Field Set
- Object Layout
- Record Type
- Related Lookup Fields
- Permission Rule
- Routing Rule
- Process
- Flow Trigger
- Validation Rule

Details

Information

API Name

CDepartment__c

Custom

CDepartment

Object Label

CDepartment

Plural Label

CDepartments

Search Filters

Style Included

Standard

Field Name Filter

Standard

Relationship Query

Deployed

Info Settings


Standard

Standard Includes on View Page


Standard

Save

Cancel



[Setup](#)
[Home](#)
[Admin Manager](#)


CDepartment

Tools

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- Relationships
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- Field Set
- Object Layout
- Record Type
- Related Lookup Fields
- Permission Rule
- Routing Rule
- Process
- Flow Trigger
- Validation Rule

CDepartment

New Relationship

Step 2: Enter the label and name for the lookup field

Field Label

CDepartment

Field Name

CDepartment

Description

Field Set

Field Relationship Name

CDepartment

Relationship Label

☒ Select the relationship label that appears in the lookup record's detail view or related master detail records.

☐ Select the relationship label that appears in the lookup record's detail view or related master detail records.

Other relationship

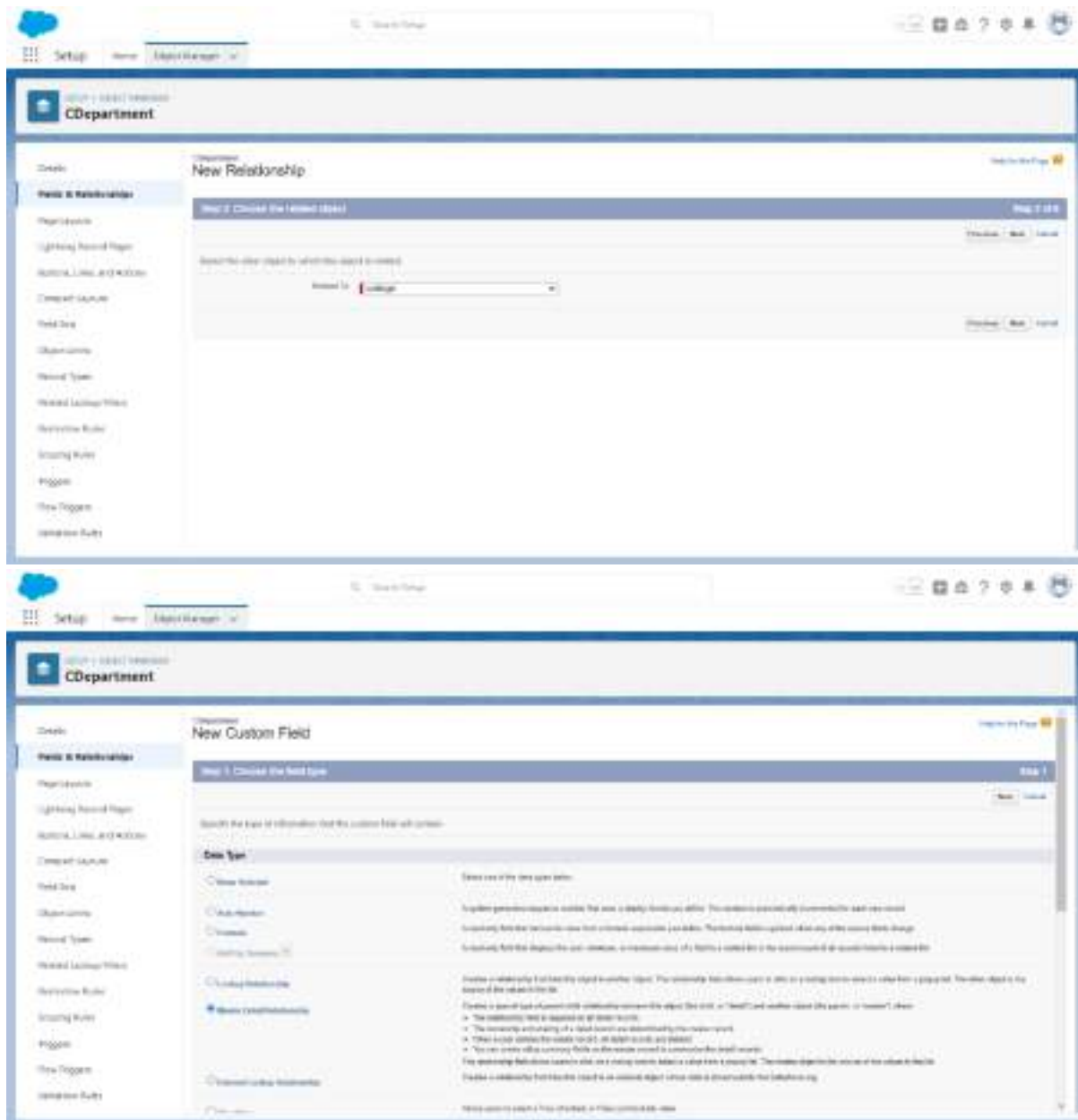
☐ Other relationship

☒ Add this field to existing custom report types that contain this entity

Lookup Field

Save

Cancel

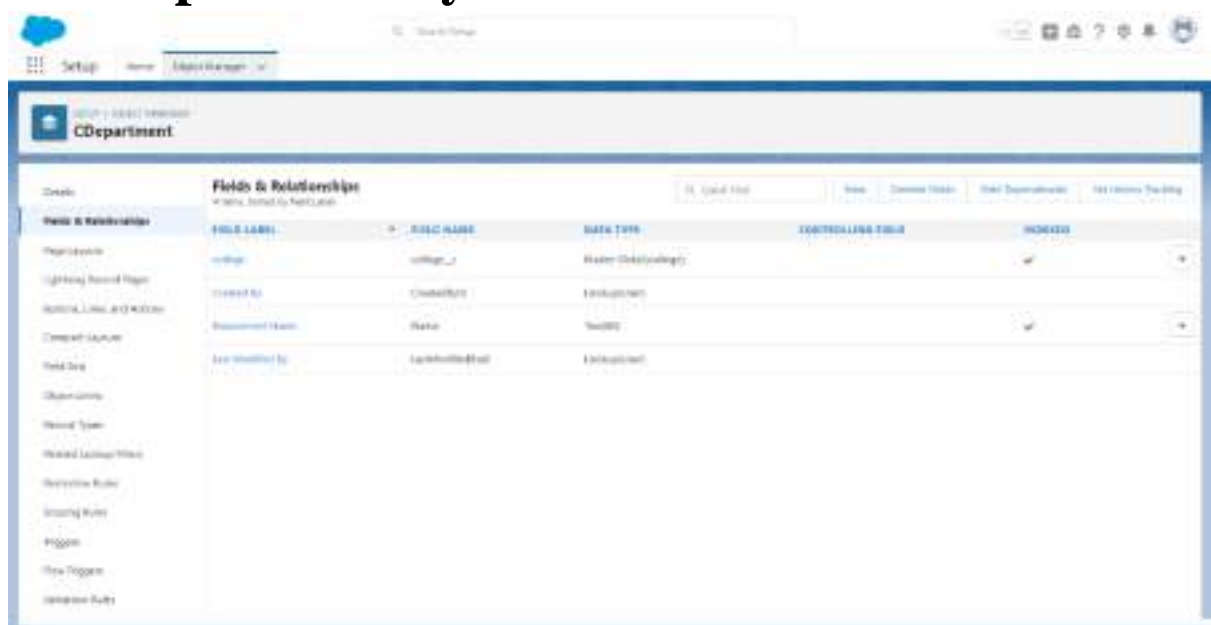


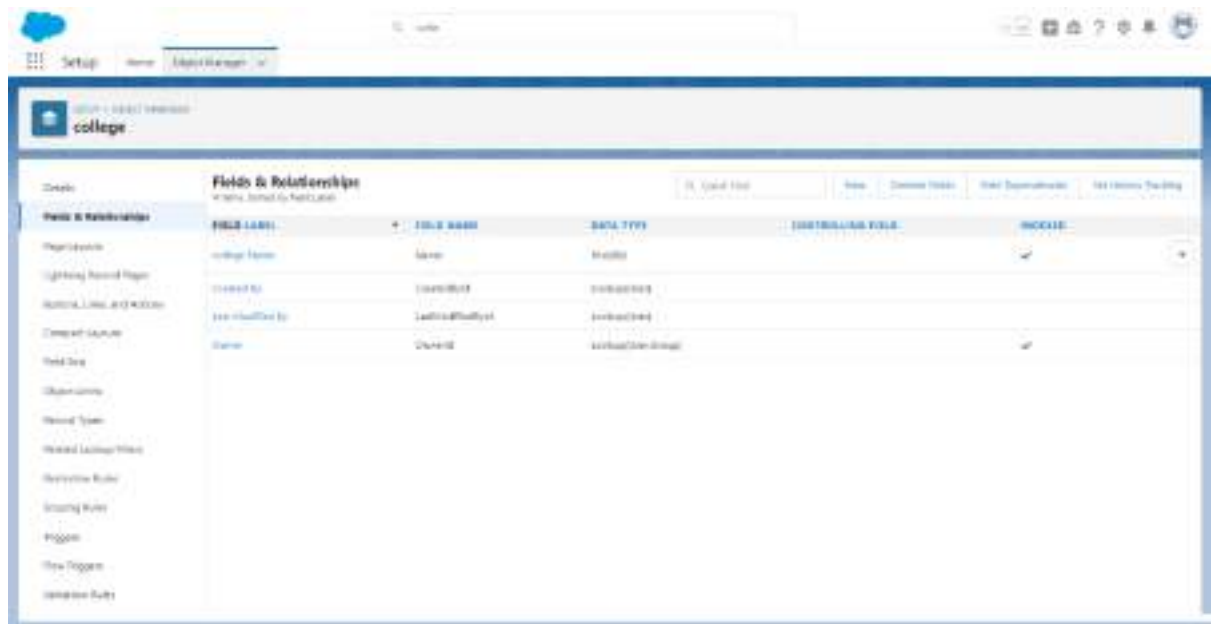
Step 3: Create the Roll-Up Summary Field

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

1. Still on the "College__c" settings, go to "Fields & Relationships."

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



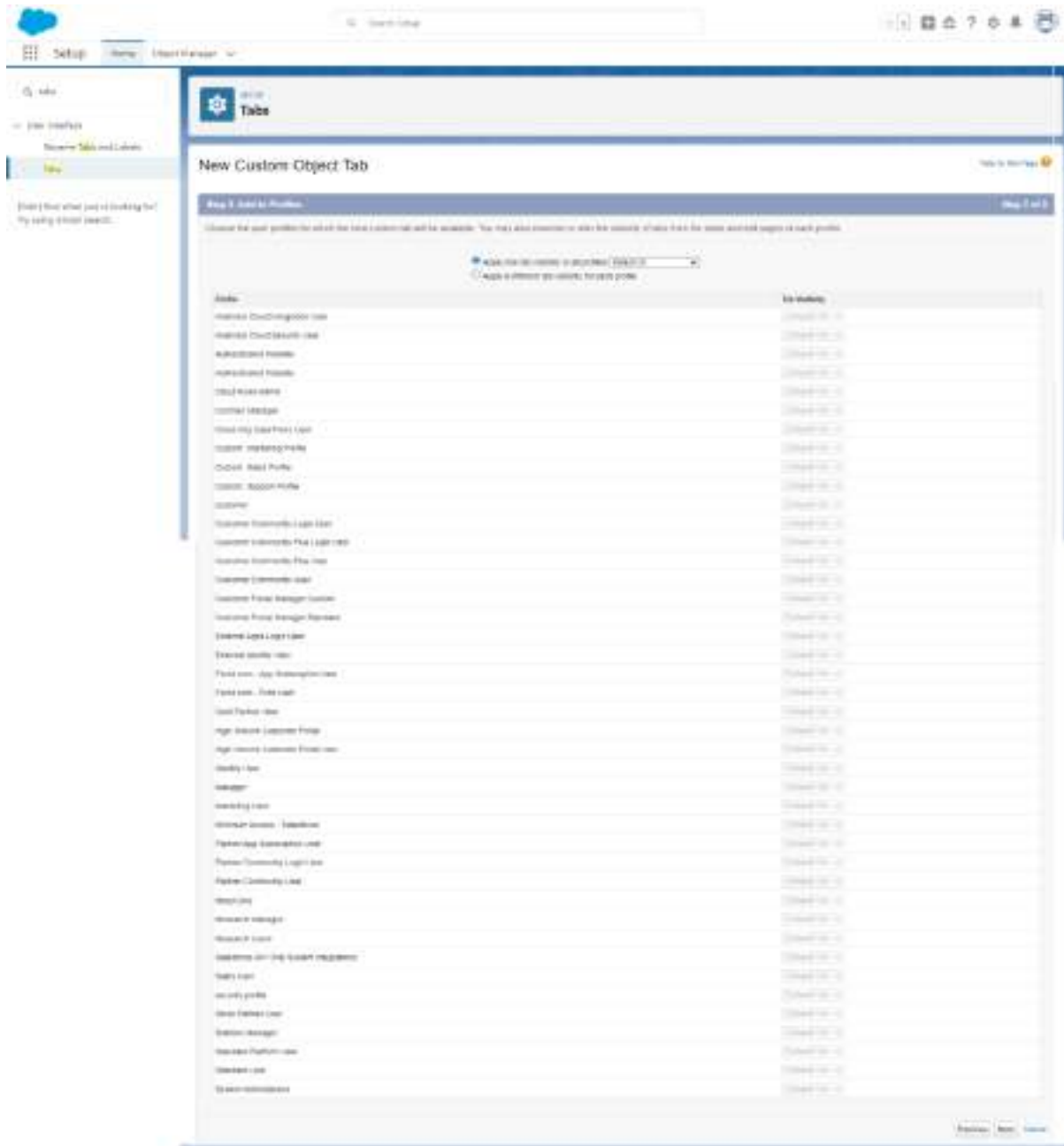


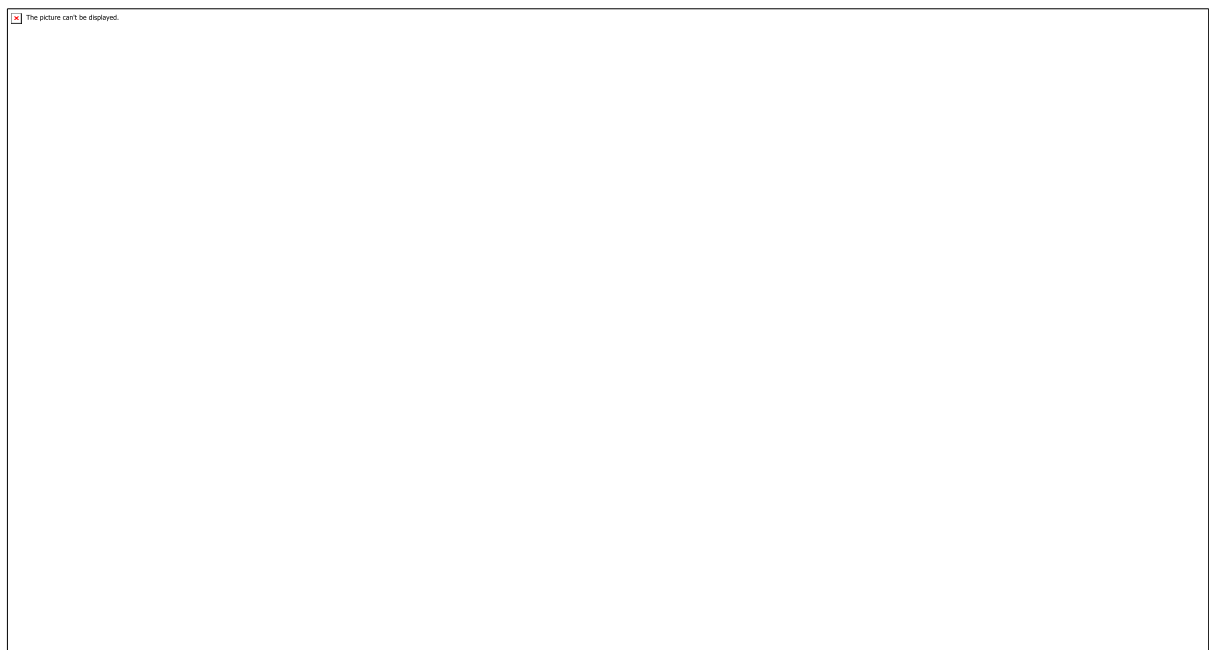
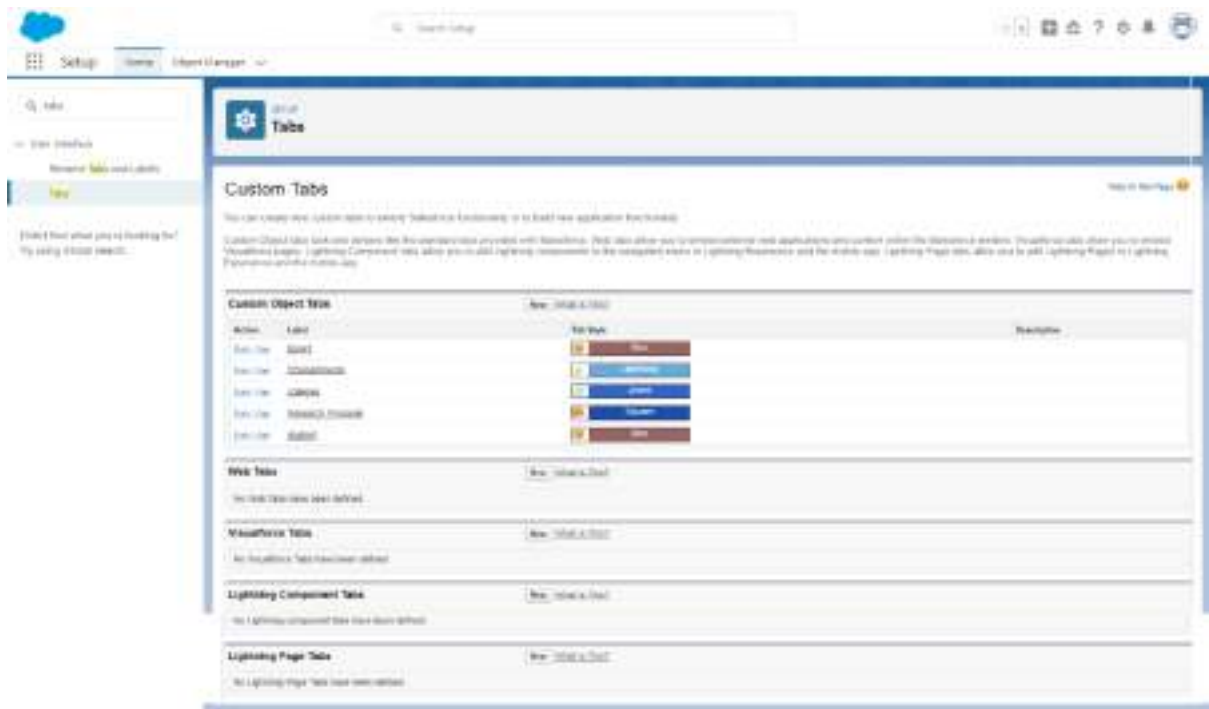
Step 4: Create a Lightning App

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

10.Assign the app to users or profiles.

11. Test the app with the assigned users.

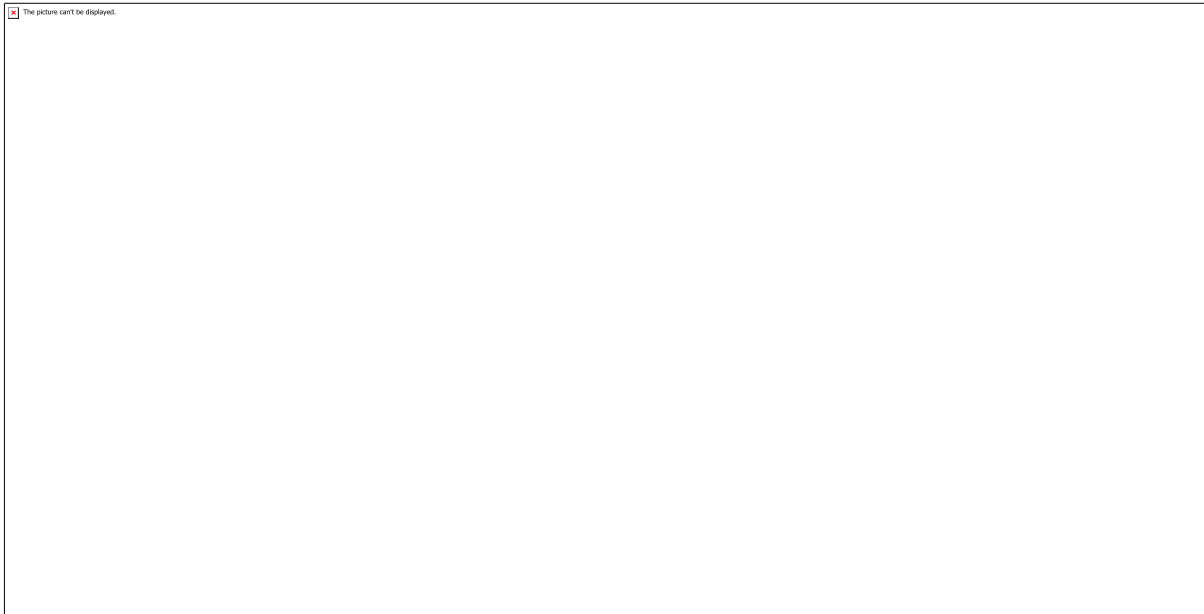





Conclusion:


Now, whenever you create or update a record in the "Department__c" related to a "College__c," the "TotalCount__c" field on the "College__c" will automatically update to show the total number of related records.


Remember to adjust field-level security, validation rules, and page layouts as needed to ensure that your custom objects and fields are appropriately configured for your organization's requirements.





 The picture can't be displayed.

 The picture can't be displayed.

 The picture can't be displayed.

 The picture can't be displayed.

 The picture can't be displayed.

 The picture can't be displayed.

The picture can't be displayed.

MECW

My college

My college

Documents

Academic

Calendar

Search

Home

Calendar

Help

Settings

Logout

My college

New Contact

Log

New Opportunity

Related

Details

College Name

MECW

Phone

01234 56789

Address

123 Main St

City

London

Postcode

EC1A 1BB

Created At

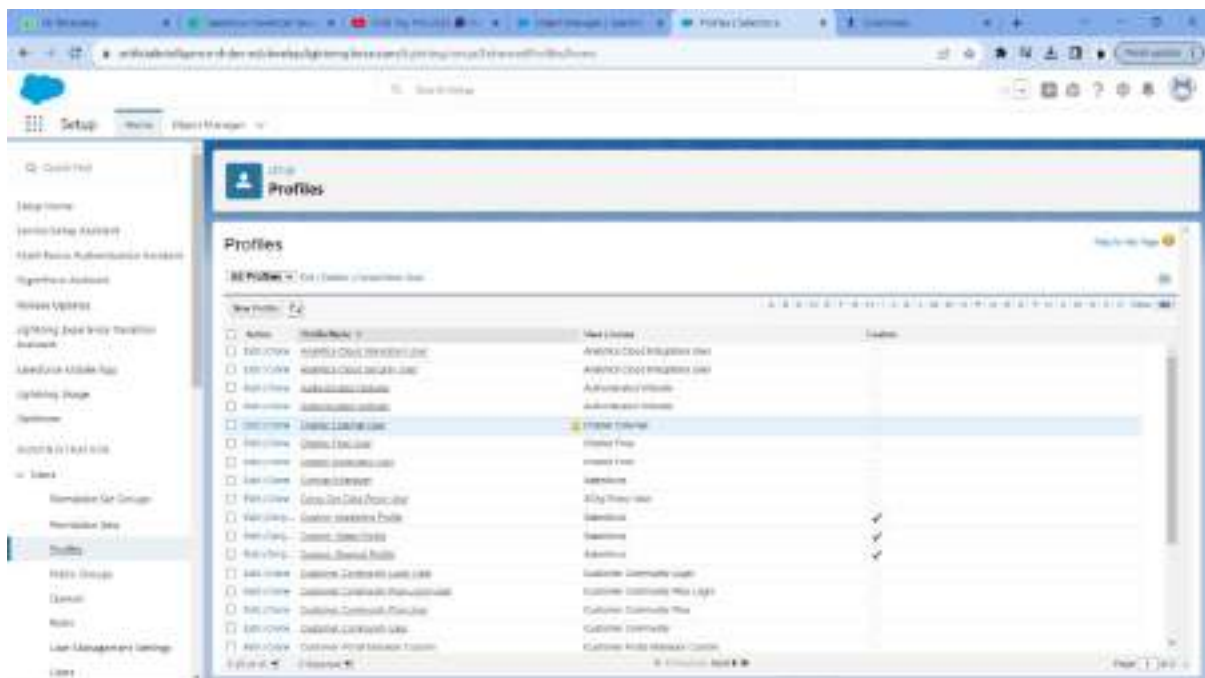
07/10/2023, 11:58 am

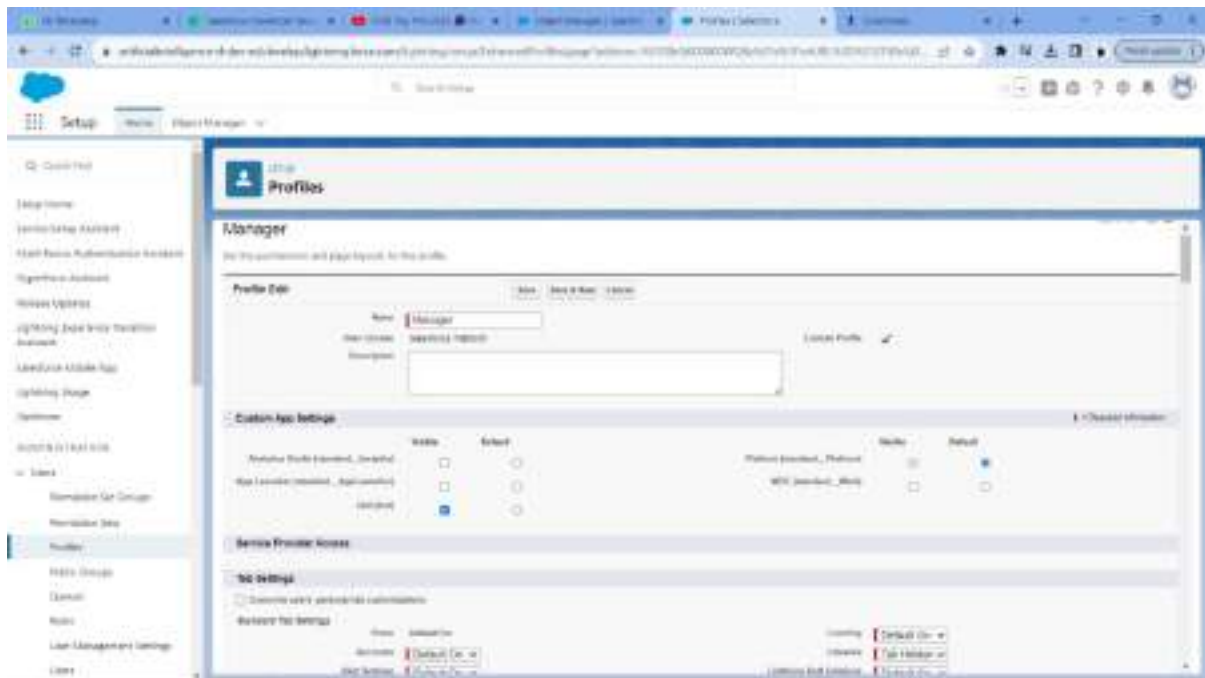
Last Modified At

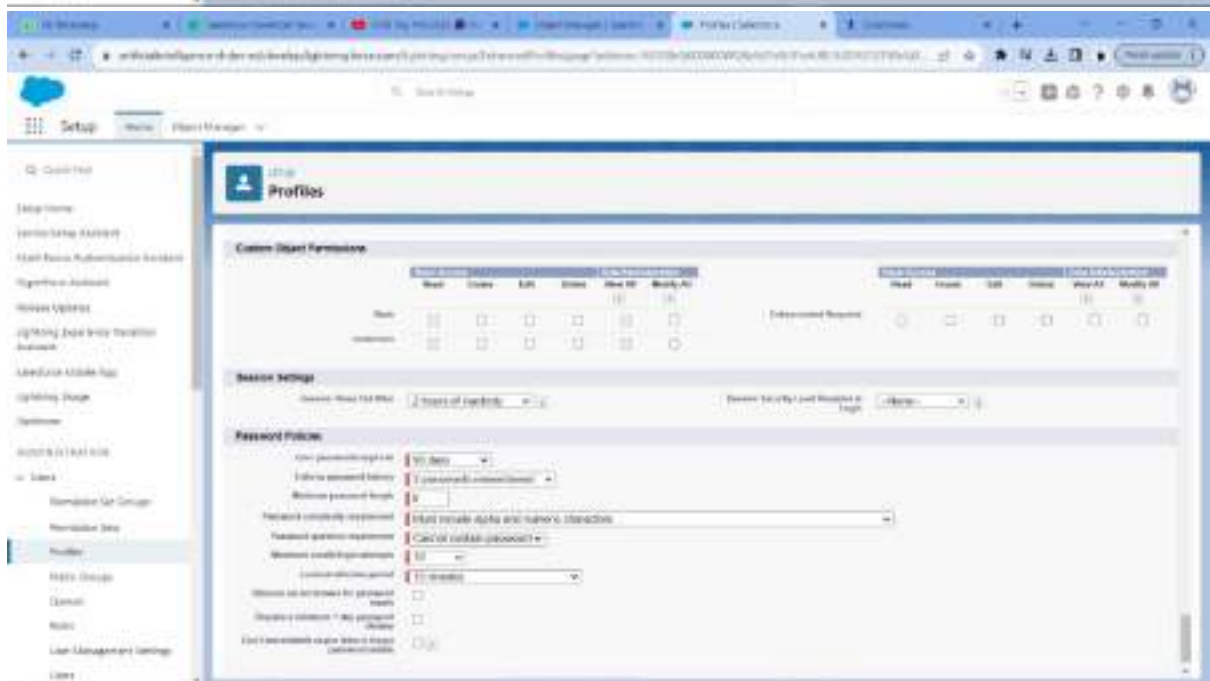
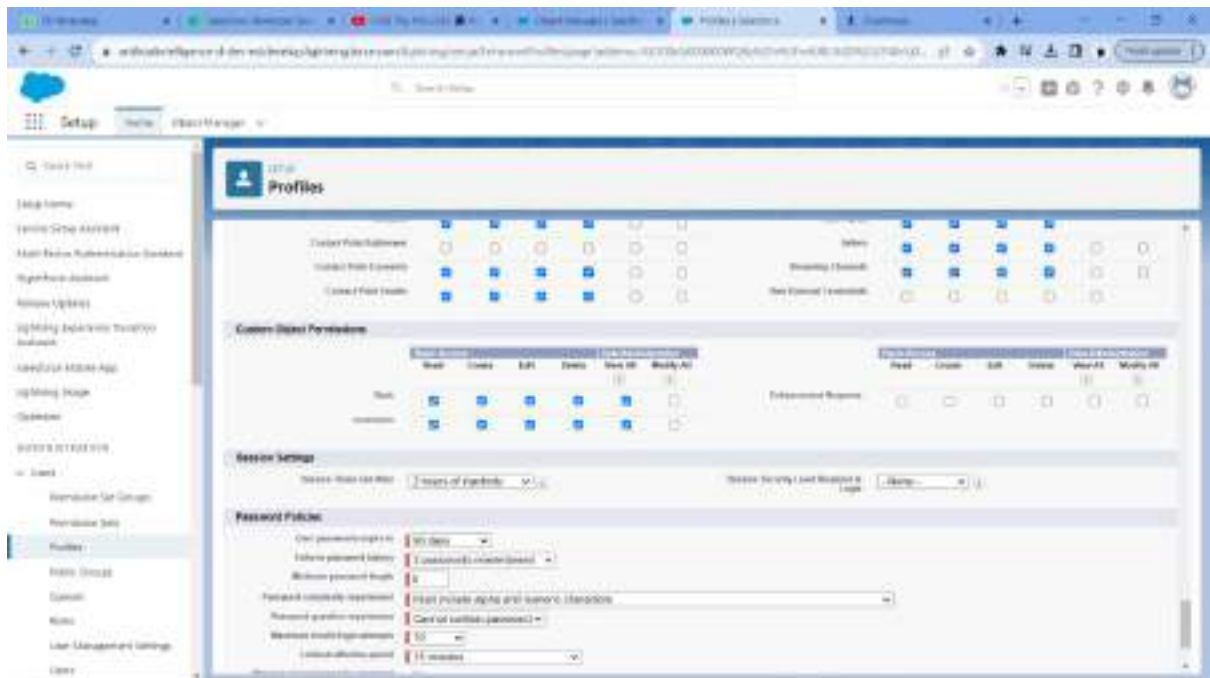
07/10/2023, 11:58 am

1 items

Step 1: Create two separate custom profiles, one for User A and one for User B.







[illegible]

The screenshot shows a Gmail interface with a sidebar on the left containing navigation icons and labels. The main content area displays an email from 'support@salesforce.com' with the subject 'Welcome to Salesforce!'. The email body includes the Salesforce logo, a welcome message, a 'Verify Account' button, and a link to verify the account. The email is marked as 'Unread'.

salesforce

Change Your Password

Enter a new password for **DEV@EXAMPLE.COM**. Your new password must be at least 8 characters long.

- 8 characters
- 1 letter
- 1 number

New Password

Show

Confirm New Password

Show

Security Question

Show

Answer

Show

Change Password

Password was successfully changed for DEV@EXAMPLE.COM. 1:33 pm

salesforce

Show


Show

Log In

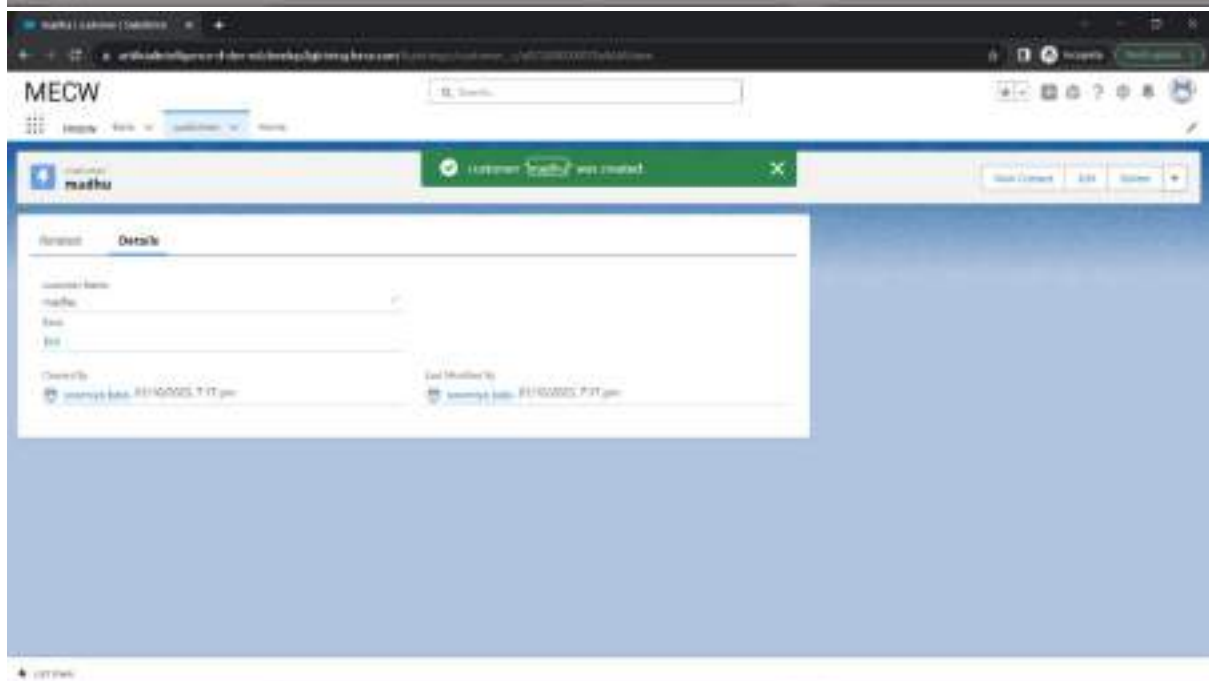
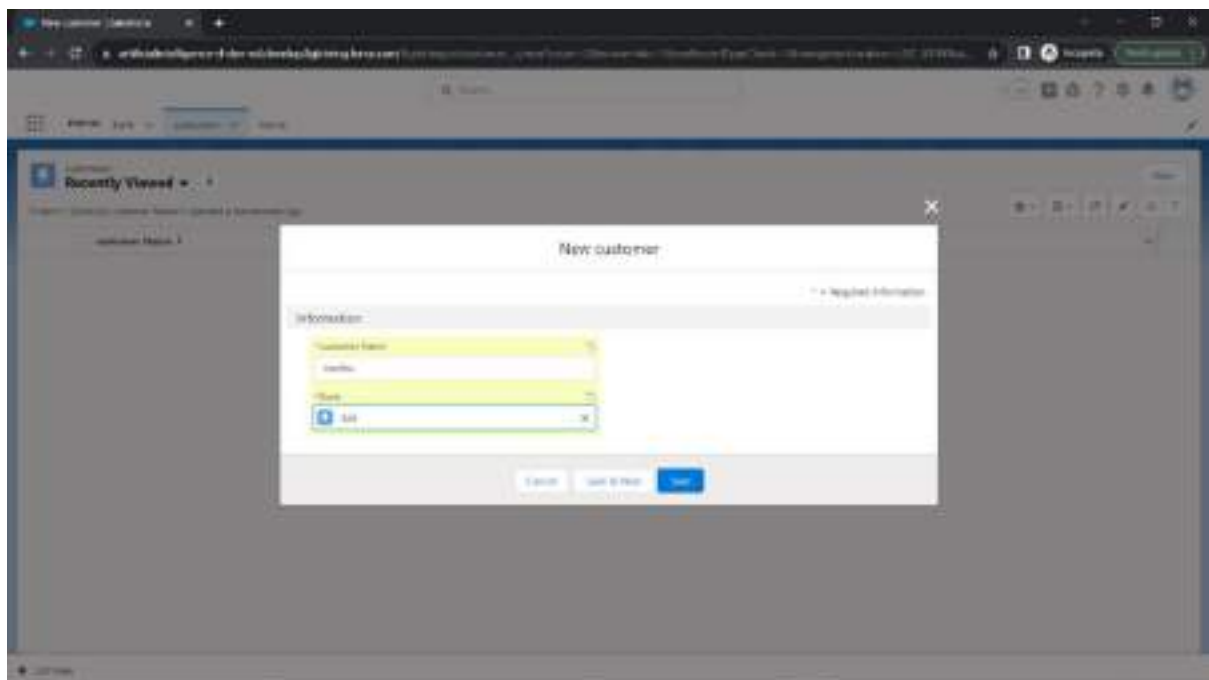
[Forgot Your Password?](#)

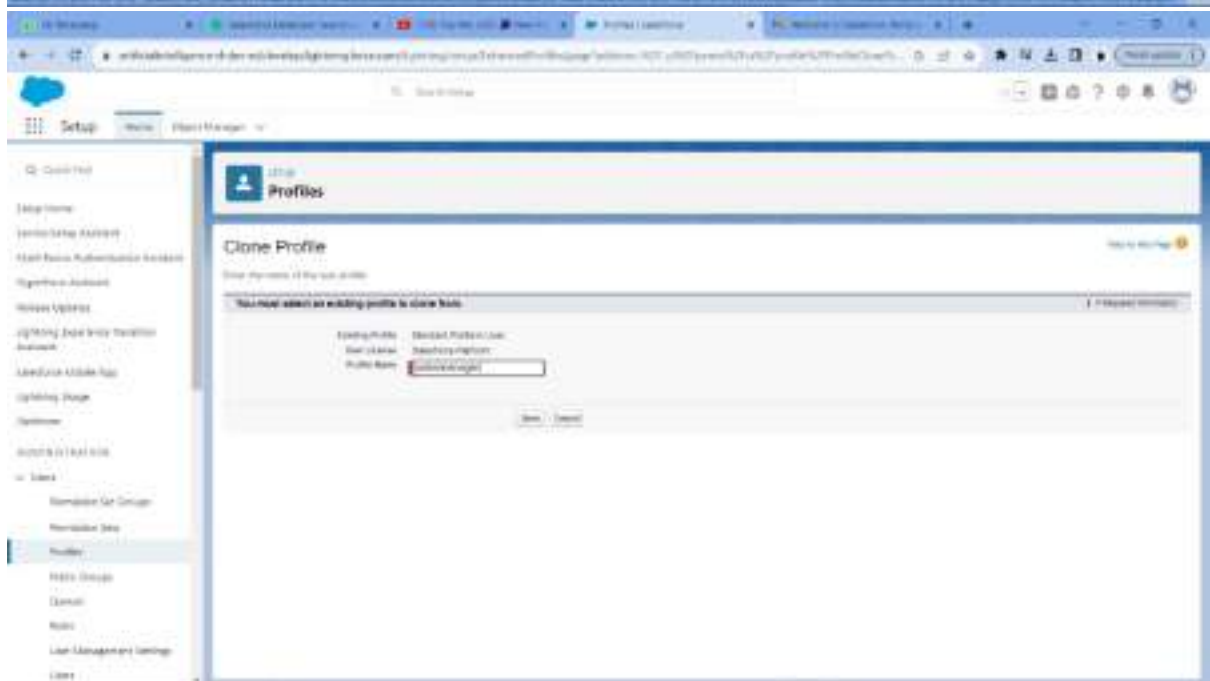
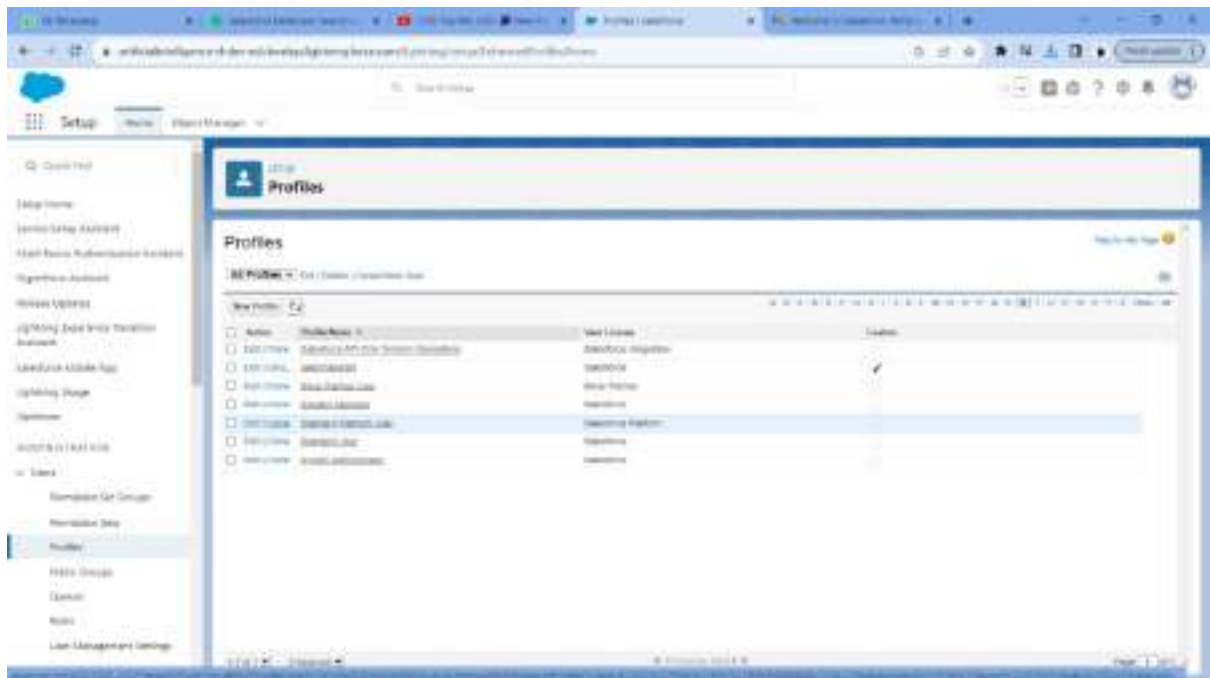
Join us for the future of trusted enterprise AI, streaming on Salesforce+.

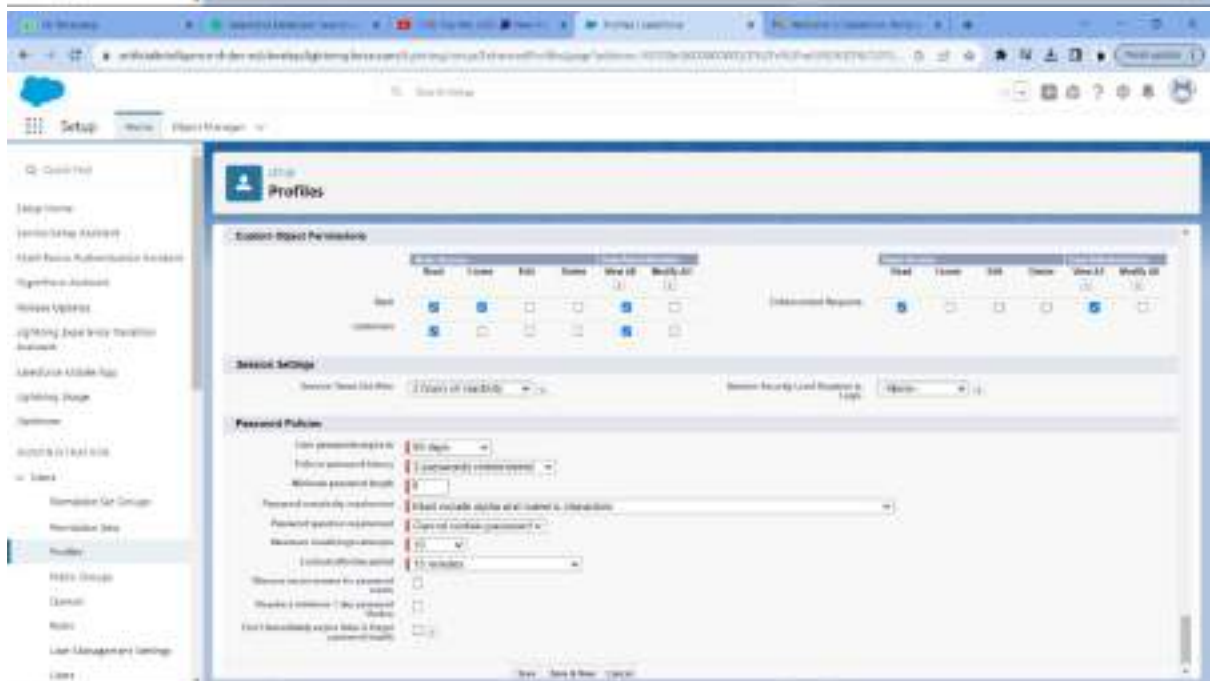
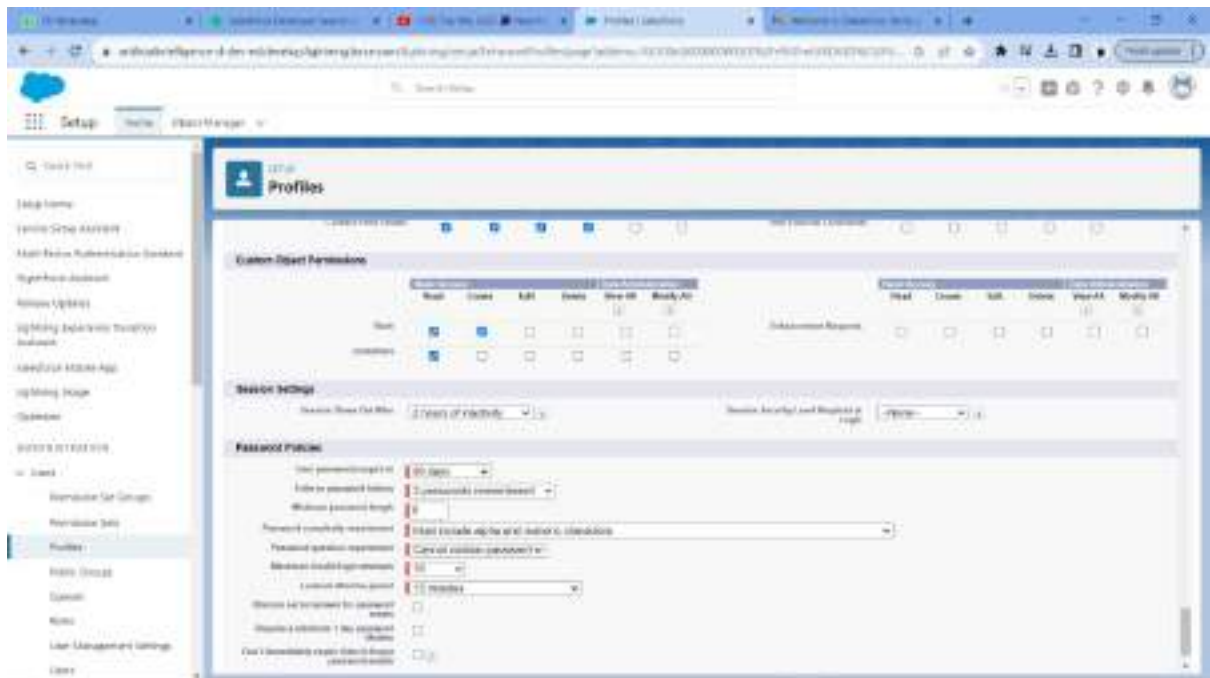
[Watch on Salesforce+](#)

 **AI Day**

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Setup Home Plans & Messages

Users

New User

user 5001 Save Save & New Cancel

General Information

First Name:

Last Name:

Age:

Gender:

Marital Status:

DOB:

Language:

Registration:

Address:

Religion:

Sex:

Sex System:

Profile:

Active: ☒

Marketing Mail: ☐

Office Mail: ☐

Knowledge Mail: ☐

Time Mail: ☐

Service Chat Mail: ☐

Get user/Connection Mail: ☐

Business Registration Mail: ☐

API Mail: ☐

Give user Role Type:

Full user details address:

Accounting Mode/Status:

High/Lowest Name on Chart:

Load/Unloading Paper White Loading:

Group Role:

Setup Home Plans & Messages

Users

New User

user 5001 Save Save & New Cancel

General Information

First Name:

Last Name:

Age:

Gender:

Marital Status:

DOB:

Language:

Registration:

Address:

Religion:

Sex:

Sex System:

Profile:

Active: ☒

Marketing Mail: ☐

Office Mail: ☐

Knowledge Mail: ☐

Time Mail: ☐

Service Chat Mail: ☐

Get user/Connection Mail: ☐

Business Registration Mail: ☐

API Mail: ☐

Give user Role Type:

Full user details address:

Accounting Mode/Status:

High/Lowest Name on Chart:

Load/Unloading Paper White Loading:

Group Role:

Setup Home Users

Users

Matching Settings

First:

Last:

Application ID:

Group:

Country:

Single Sign-On Information

Username ID:

Locale Settings

Time Zone:

Locale:

Language:

App User Settings

Default App User:

App User:

App User App User ID:

☐ App User App User ID is not used for app user

Save Save & Back 1/20/20

Setup Home Users

Users

Matching Settings

First:

Last:

Application ID:

Group:

Country:

Single Sign-On Information

Username ID:

Locale Settings

Time Zone:

Locale:

Language:

App User Settings

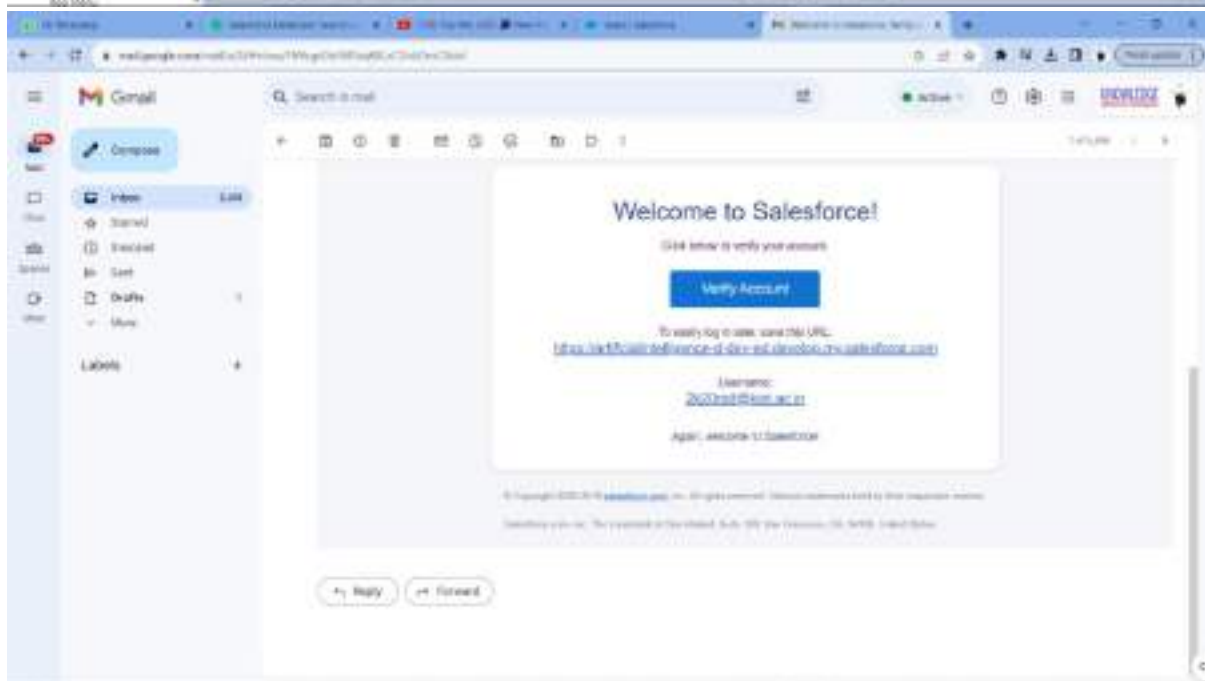
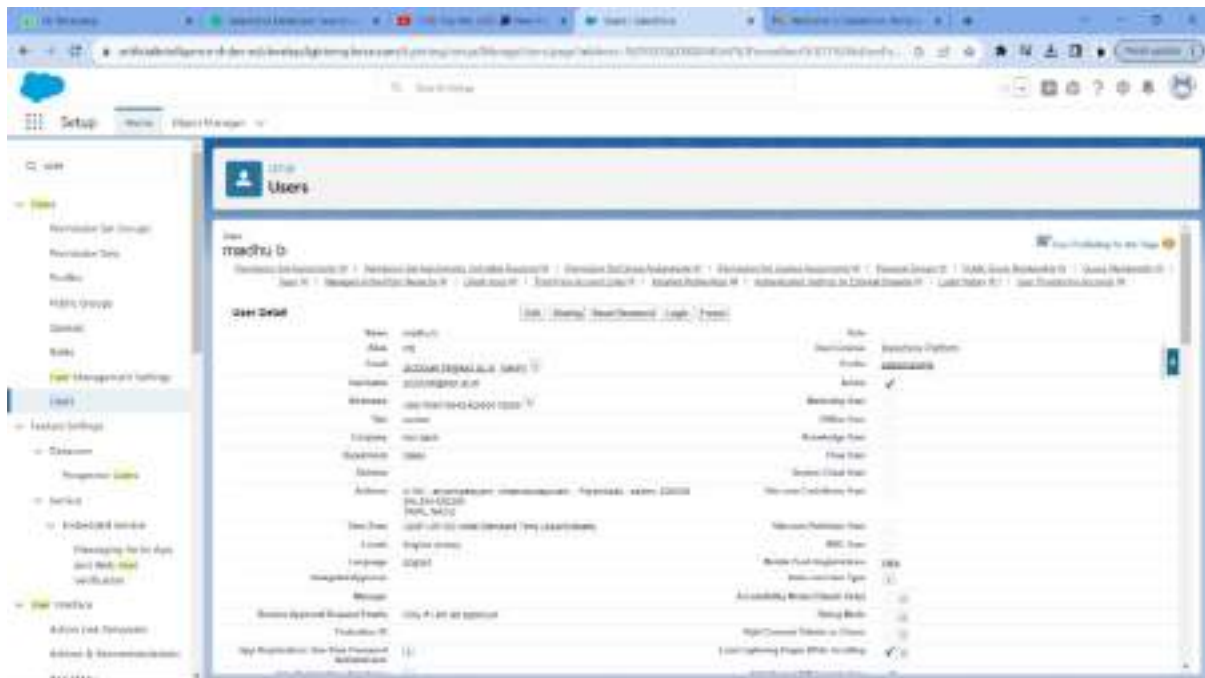
Default App User:

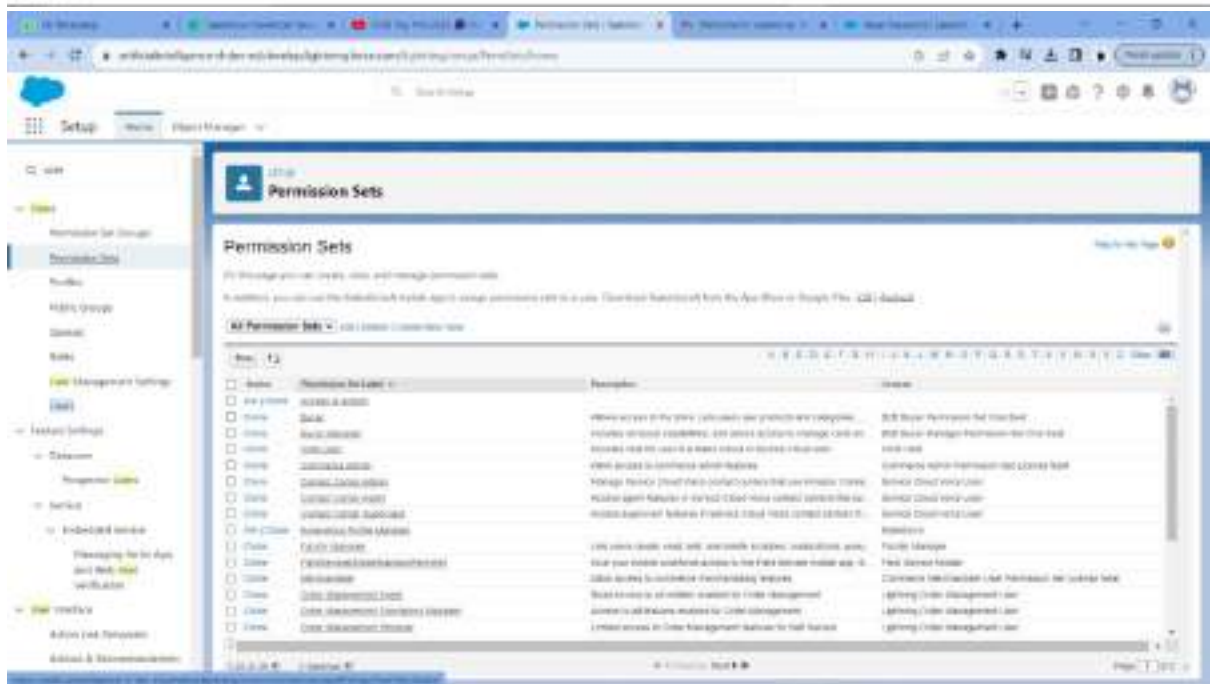
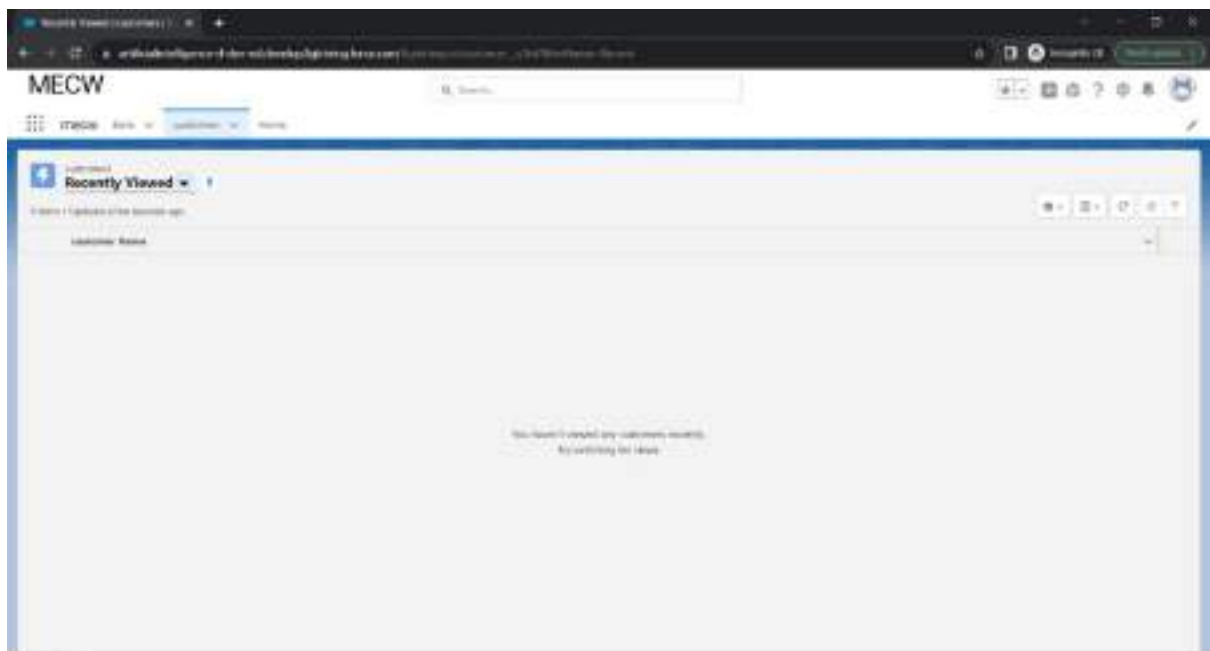
App User:

App User App User ID:

☐ App User App User ID is not used for app user

Save Save & Back 1/20/20





Step 2:

Permission Sets:

- Create two permission sets, one for User A and one for User B.

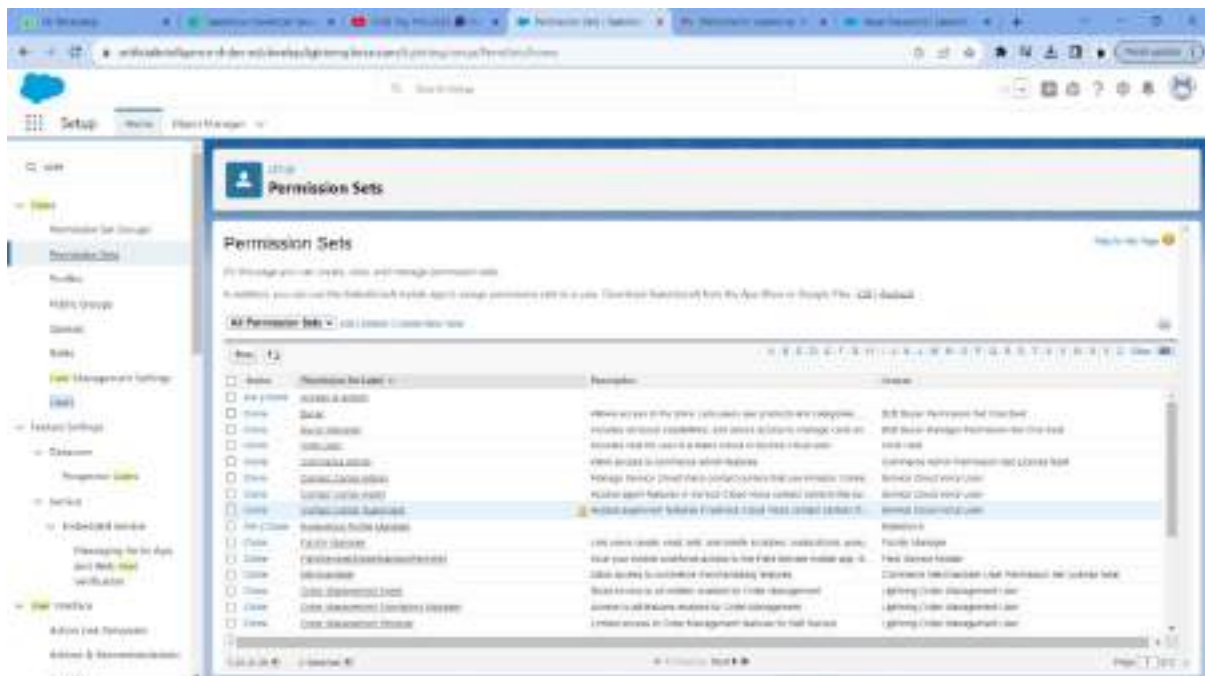
Object-Level Security:

- In each profile and permission set, set the object-level security for the Account object to "Read" to ensure that both I-Jser A and I-Jser B can view Account records.


Record-Level Security:

- Implement record-level security using Criteria-Based Sharing Rules.
- Create a sharing rule that shares Account records owned by User A with User A and records owned by IJser B with user B.
- For the sharing rule criteria, specify that records owned by User A are shared with user A, and records owned by User B are shared with User B.

Ownership:

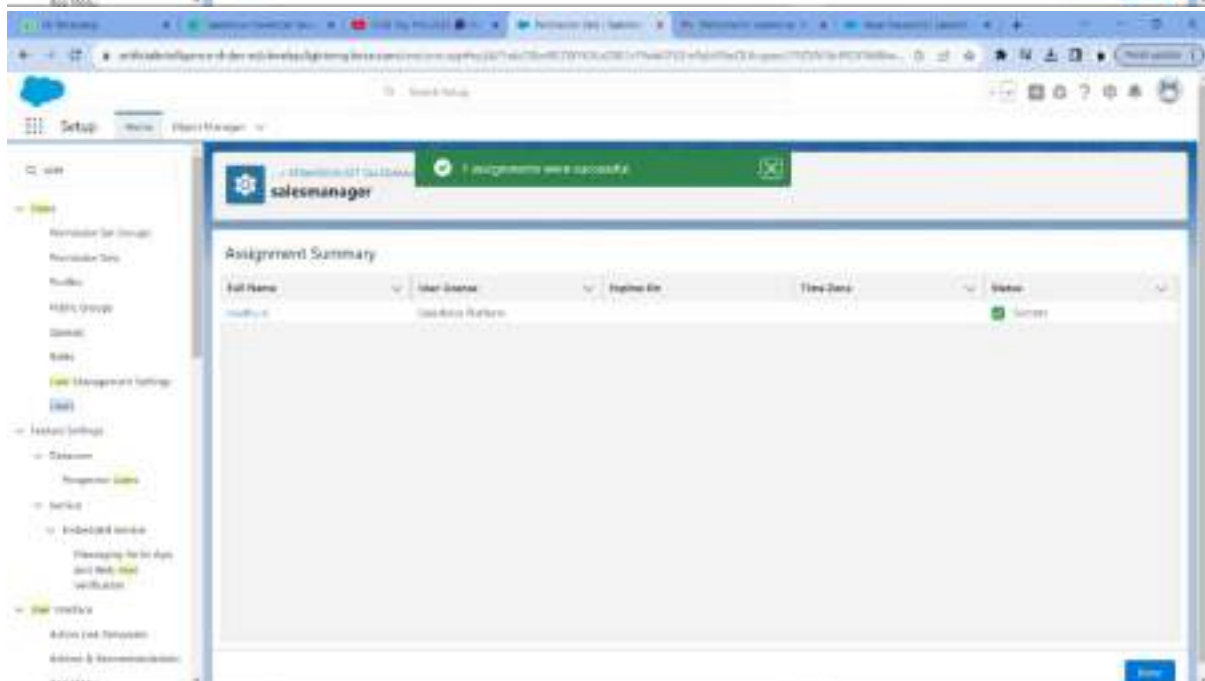
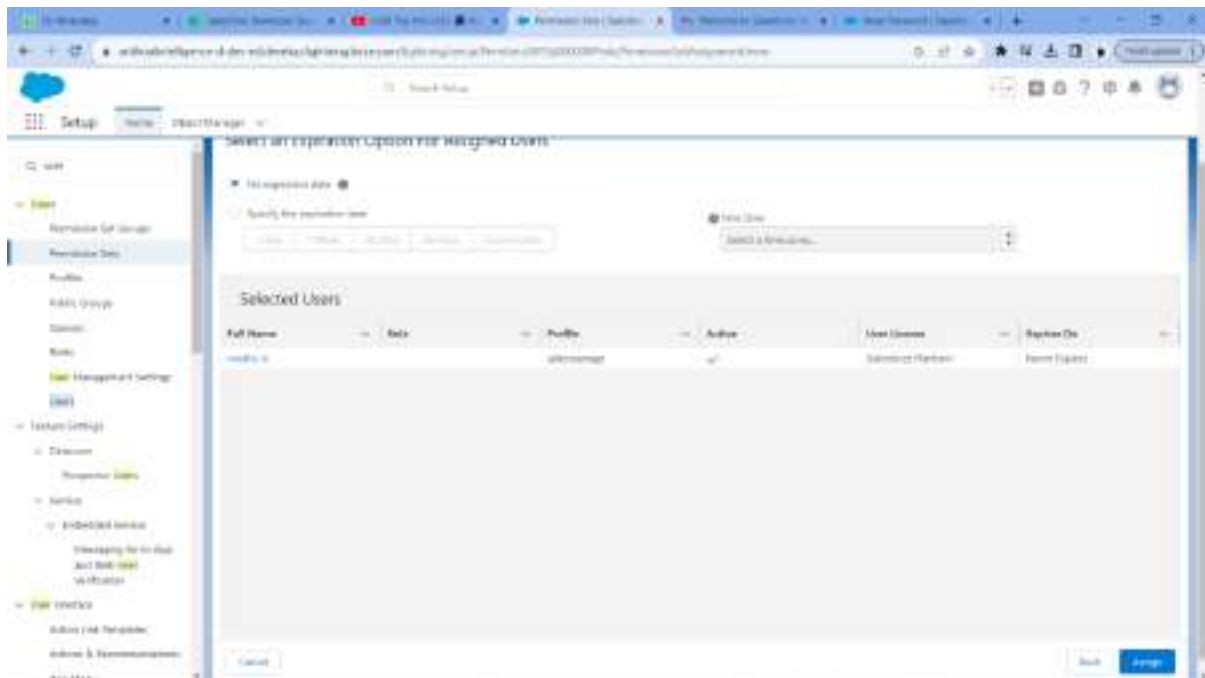


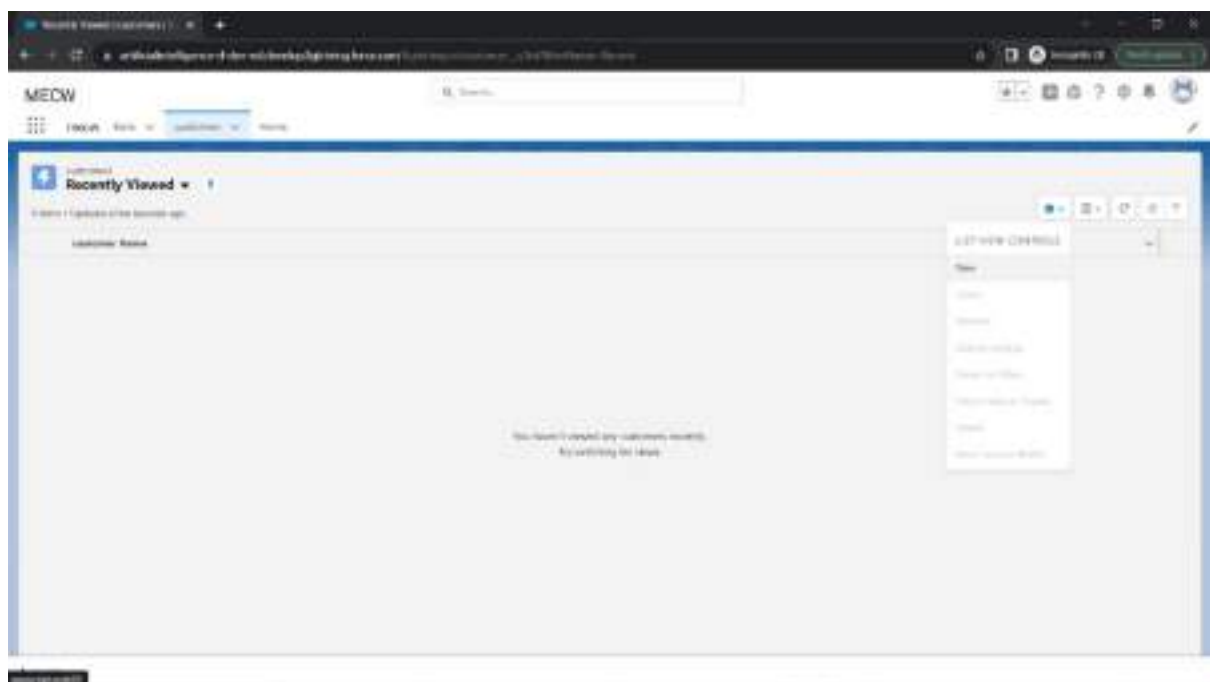
[illegible][illegible]



The screenshot shows the Microsoft Entra ID 'Permission Sets' configuration page. The left sidebar is expanded, showing the 'Users' section. The main content area displays the 'calendarmanager' role. The 'Basic' tab is selected, showing the role's name, ID, and settings. Below this, the 'Object Permissions' section shows a table of permissions for the role, including 'calendarmanager' and 'calendarmanager'.

Permission Name	Is Enabled
calendarmanager	Yes
calendarmanager	Yes



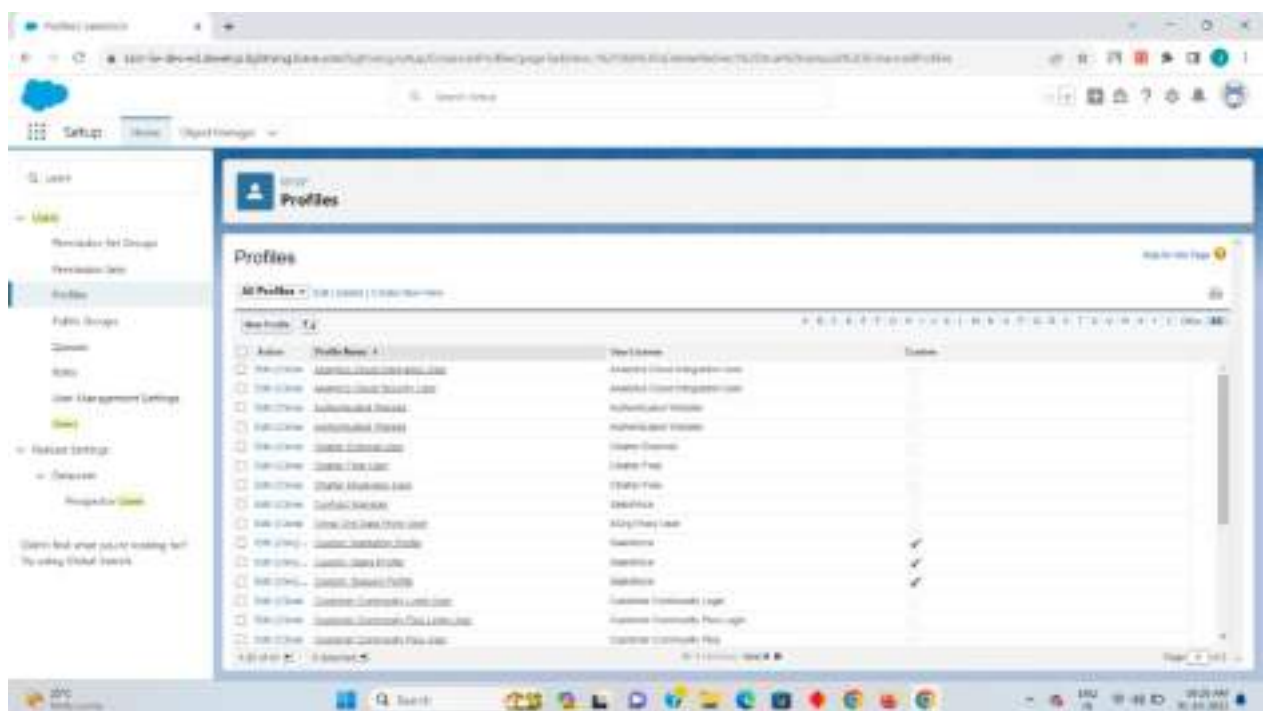


3. . Suppose there are 2 Users and they are having Create, Read, Edit access on Account Object with the same profile but we want to open up the access for one user to delete how will you implement the Security setting.

Solution:

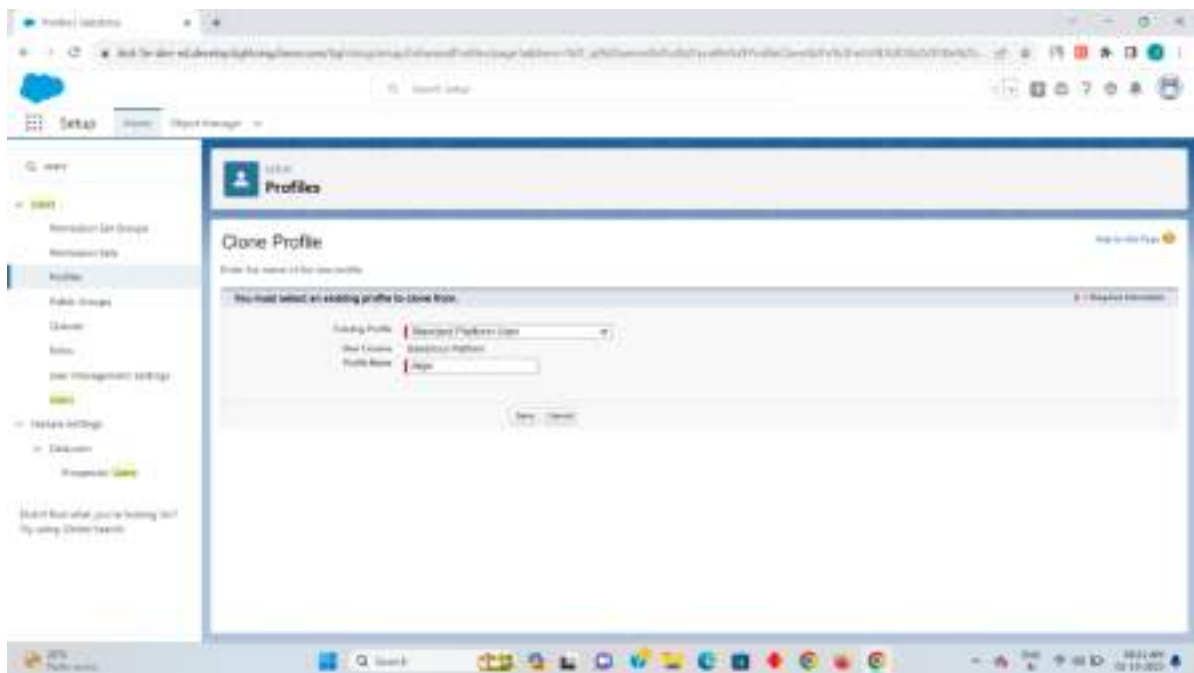
Step 1: we need create a profile for the two user which has the access to Create, Read, Edit for follow as per.

Setup-quick search[profile]



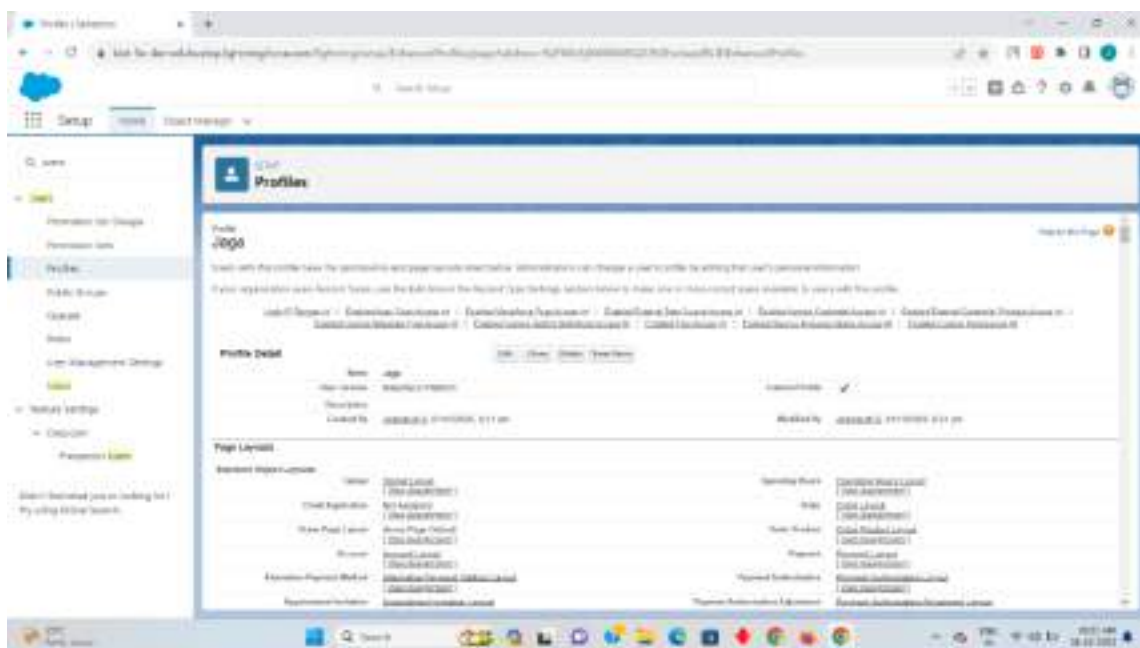
Step 2:

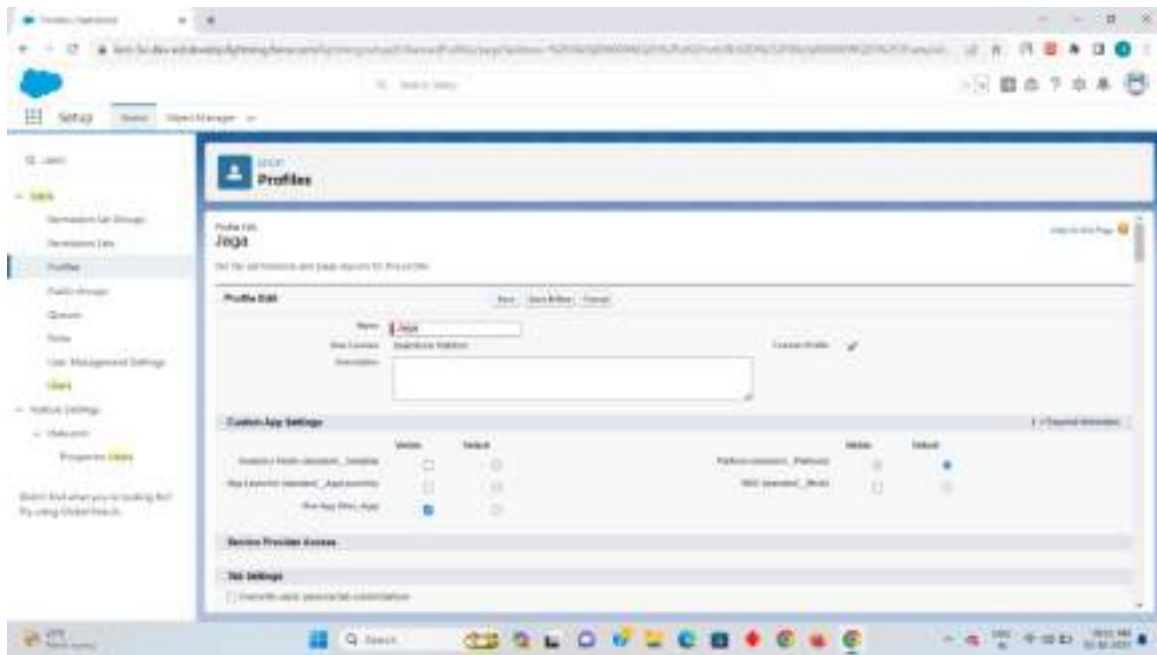
Click on the new to create a new profile along with the label and Api



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

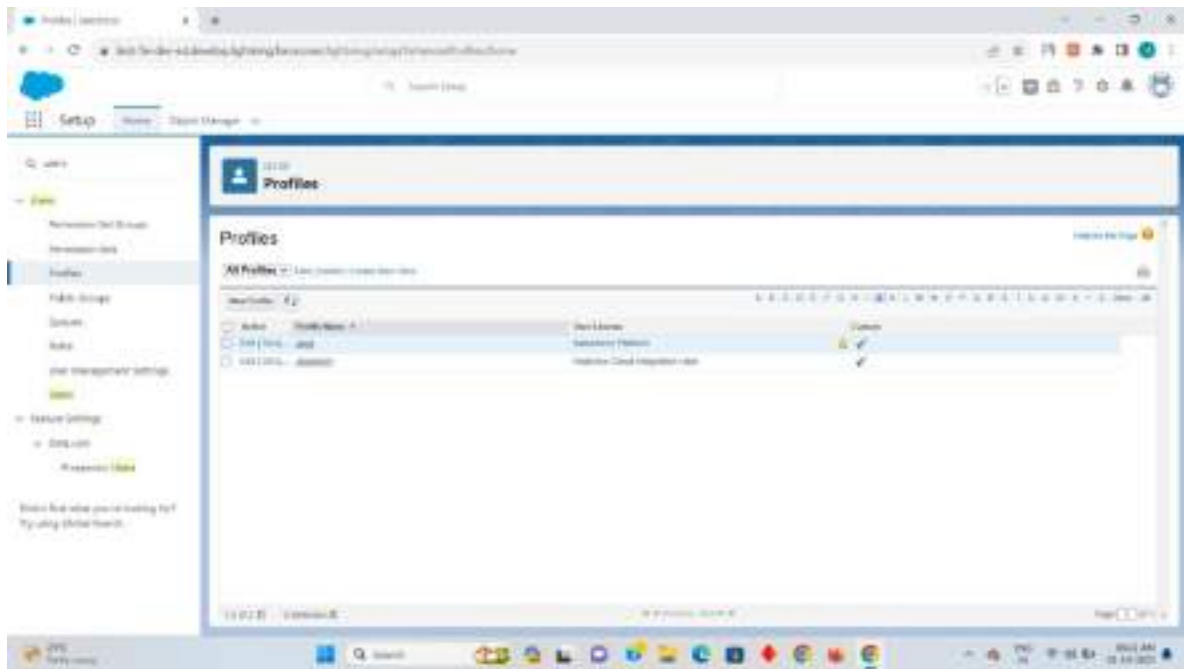
Now click on the edit and scroll down to custom object settings and enable the read,create,edit and view options. After that click on save.





Step 4

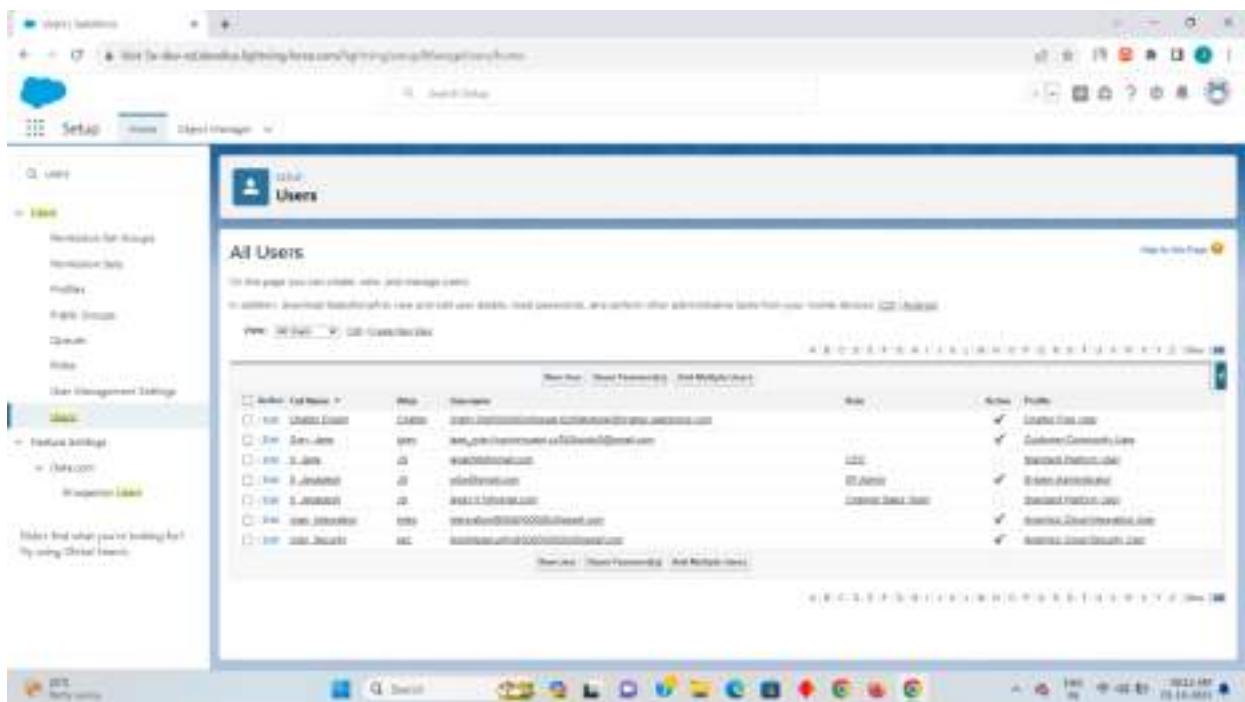
Now you can preview your created profile on the profile option here my profile name jaga has been created with the access of read,create,edit along with view on it

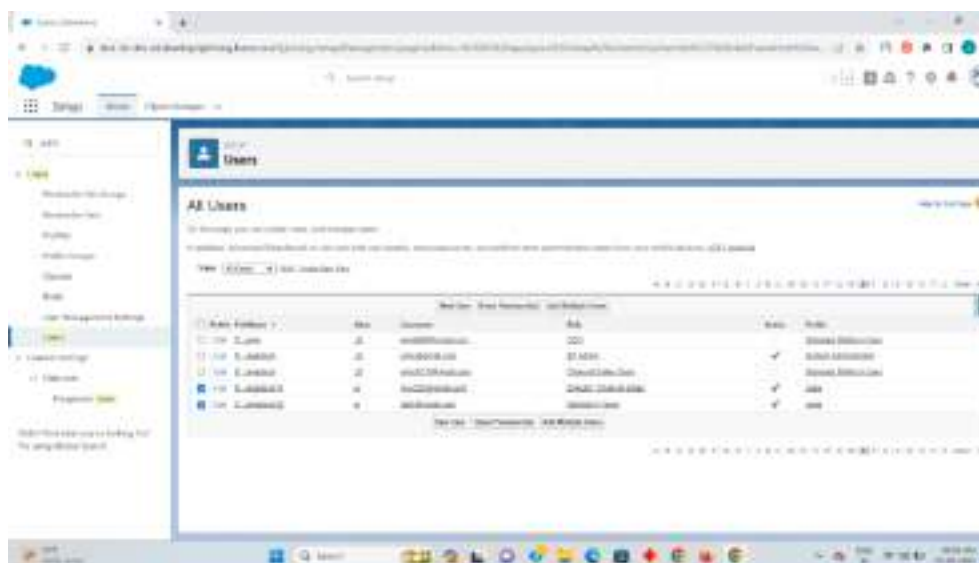


Step 5:

Now create two users by enter into the Setup-quick search[user] and then click on new user after clicking that you need to create two user along

with the profile as Jaga which we have created on the step 2. once the one user has been created click on the save&new so that you can create the second user and there the user name can be created with alternate name but with the same user profile and once the two user are created click on save.



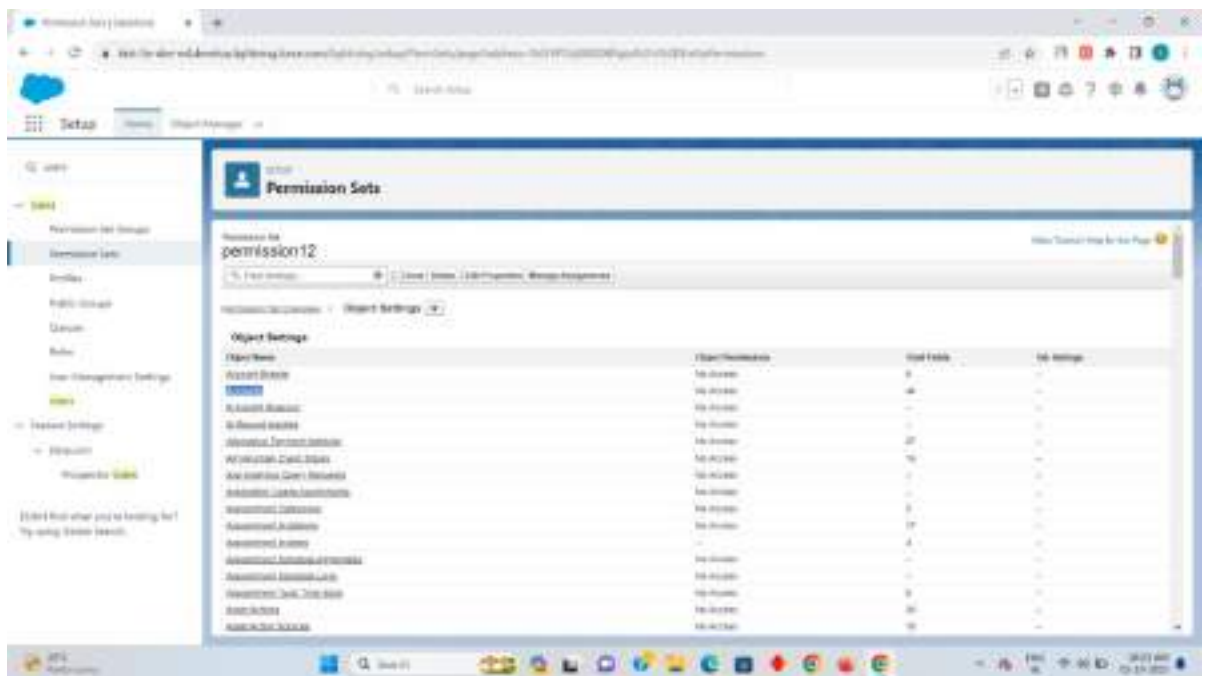


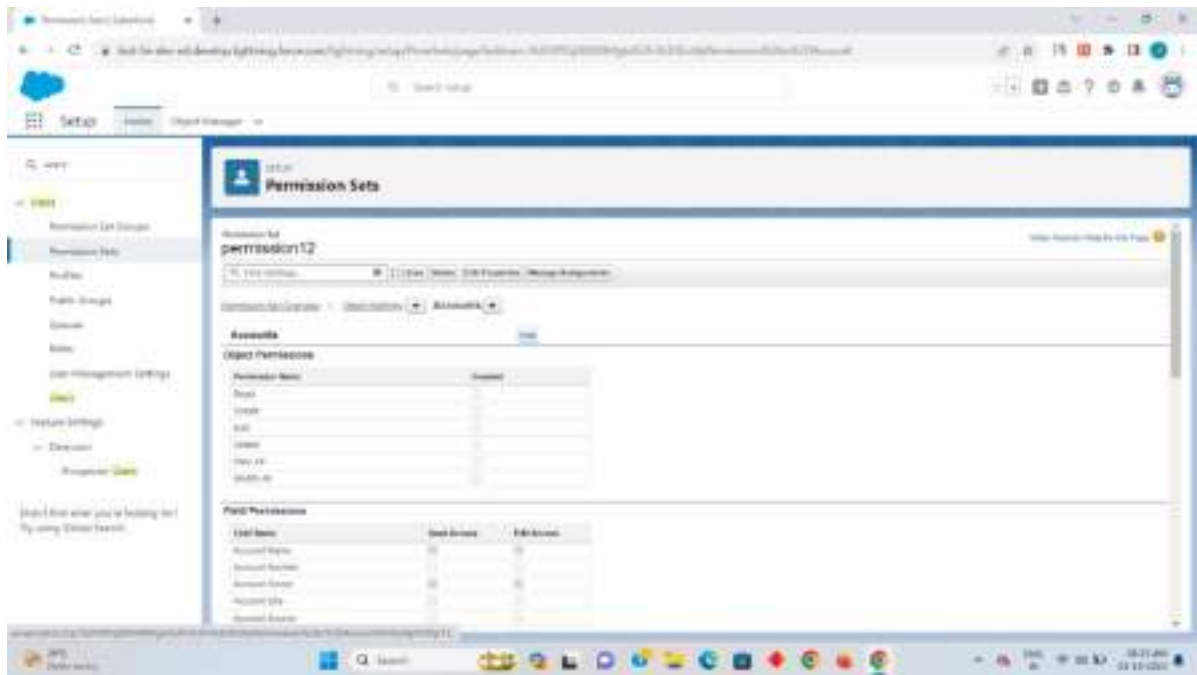
Now you can preview your two user that you have created in my side I had create the two users a Jagadesh11 and Jagadesh22 as a director channel sales with the marketing team.

Step 6:

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

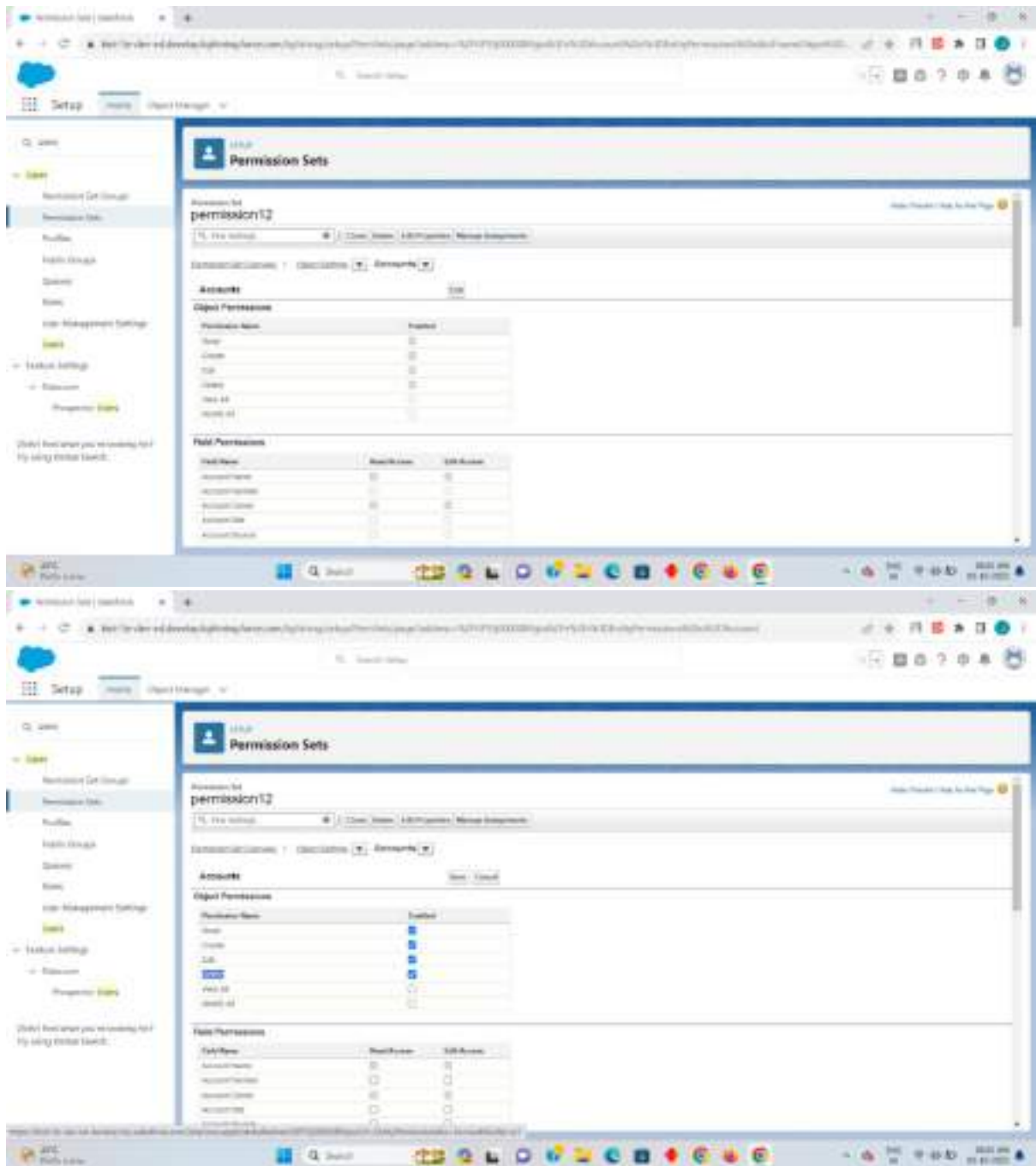
setup-quick search[permission set]-new-fill label name [auto select the API name]-click on save-object settings-accounts.





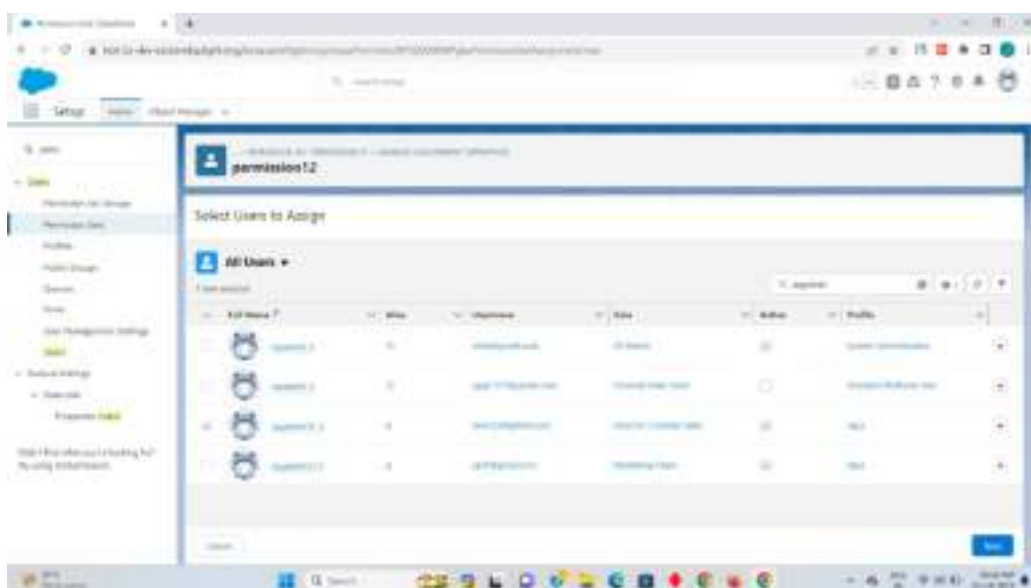
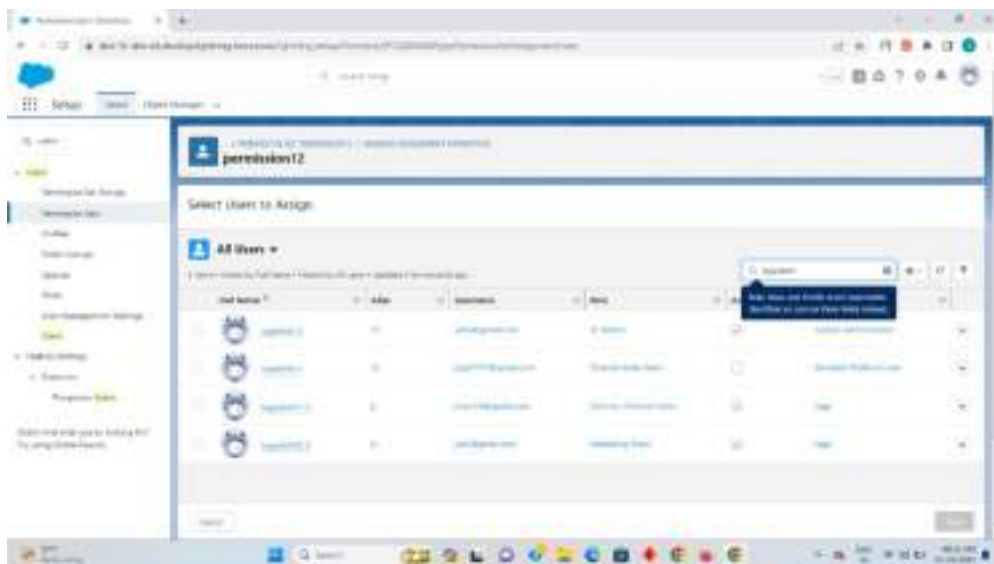
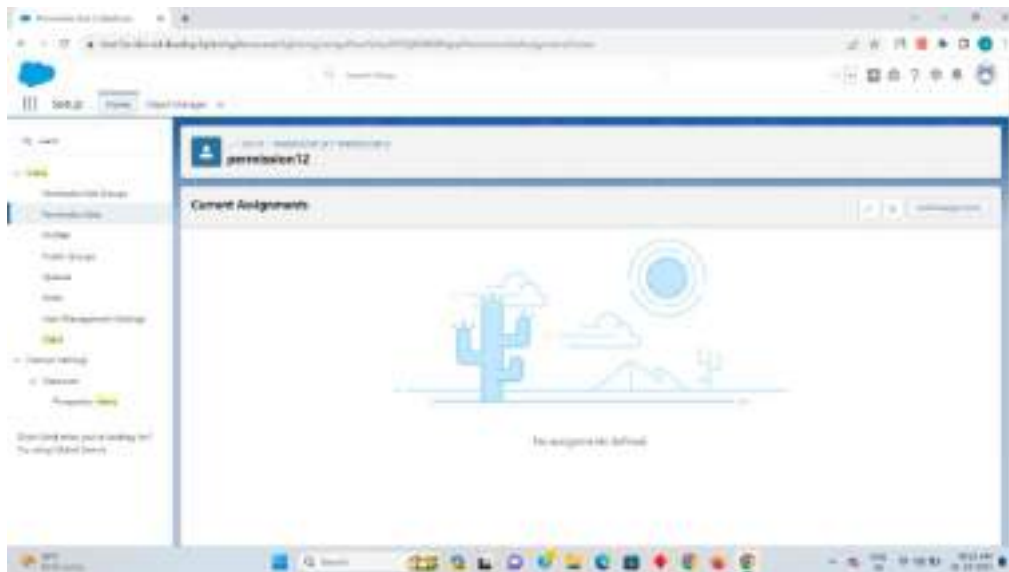
Step 7:

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

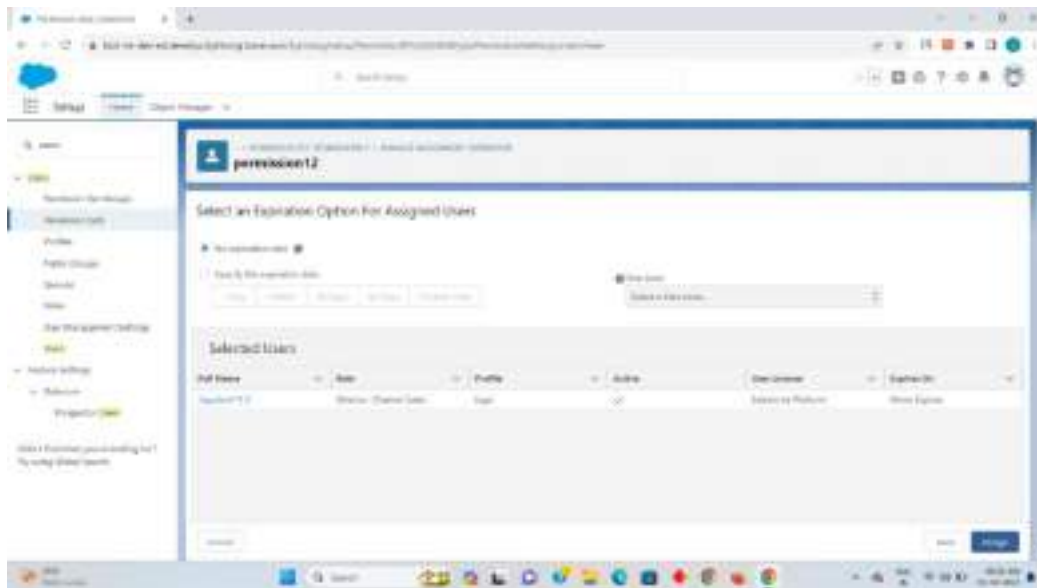


Step 8

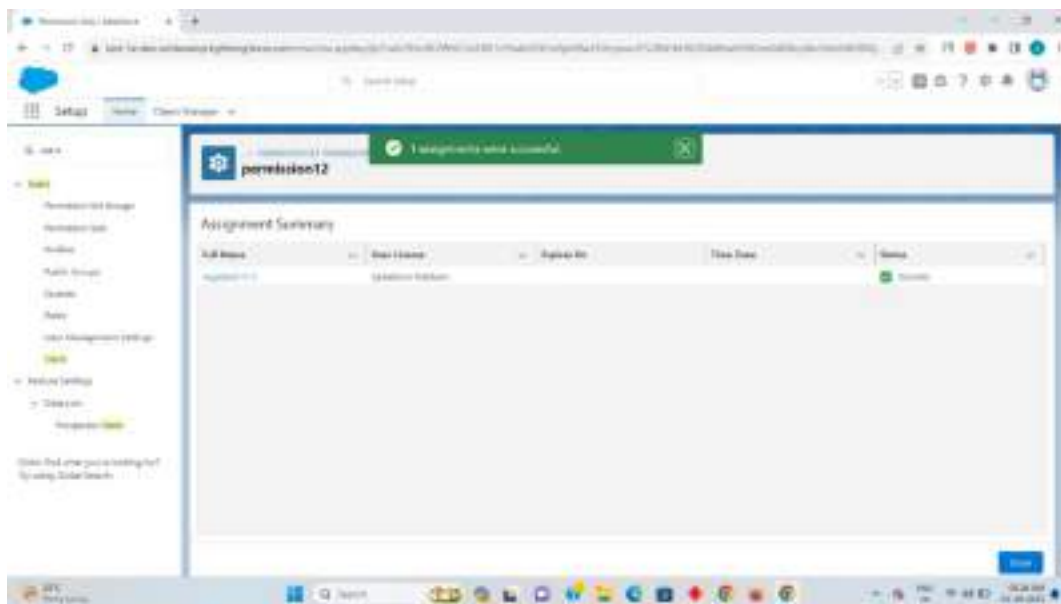
Now click on add assignment there you will find your two created users click on any one user to give a special access as delete on it and then click on assign so that the specific selected user can have a special access as delete on it.



Click on next.



Now click on Assign.



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


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

Solution:

Step 1: Create a Custom Object

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

1. Click **Setup**.
2. In the Object Manager, click **Create | Custom Object**.
3. Now create a custom object **Survey Result** and fields as shown in the screenshot below:
4. Click **Save**.



SETUP > OBJECT MANAGER

Survey Result

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Search Layouts for Salesforce Classic

Triggers

Validation Rules

Fields & Relationships

8 Items, Sorted by Name

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Comment	Comment__c	Text Area(255)		<input type="checkbox"/>
Created By	CreatedById	Lookup(User)		
Email	Email__c	Email		<input type="checkbox"/>
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name__c	Text(51)		<input type="checkbox"/>
Owner	OwnerId	Lookup(User,Group)		<input checked="" type="checkbox"/>
Rating	Rating__c	Picklist		<input type="checkbox"/>
Survey Result Name	Name	Auto Number		<input checked="" type="checkbox"/>

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.

Email Template
Thank You Email - Survey

[Edit in Builder](#)
[Edit](#)
[Clone](#)

Details
Related

Information

Email Template Name	Thank You Email - Survey	Related Entity Type	Survey Result
Description		Folder	Public Email Templates
Made in Email Template Builder	<input checked="" type="checkbox"/>		

Message Content

Subject	Thank You For Completing Our Survey!	Enhanced Letterhead	
HTML Value	<div> <div></div> <div> Hi {{{Survey_Result__c.Name__c}}}, Thanks for taking time out to participate in our survey. We are very appreciative of the time you have taken to assist in our analysis, and commit to utilizing the information gained to contemplate and implement worthwhile improvements. We will share these results with you through your State Survey Agency, whom we also thank for their generous participation. Once again, we are extremely grateful for your contributing your valuable time, your honest information, and your thoughtful suggestions. Thanks, Automation Champion </div> <div></div> </div>		

Additional Information

Created By	Rakesh Gupta, 12/21/2020, 4:23 PM	Last Modified By	Rakesh Gupta, 12/21/2020, 4:32 PM
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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**.

The screenshot shows the 'Edit Email Alert' interface for 'Survey - Thank You Email'. The page includes a header with 'Edit Email Alert' and 'Survey - Thank You Email', and a 'Help for this Page' link. Below the header is a description: '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.' The main form is titled 'Email Alert Edit' and contains several sections: 'Edit Email Alert' with fields for Description, Unique Name, Object, Email Template, Protected Component, and Recipient Type; 'Recipients' with 'Available Recipients' and 'Selected Recipients' lists; 'Additional Emails' with a text area; and 'From Email Address' with a dropdown and a checkbox. The 'Recipients' section shows 'User' as the selected type, and the 'Available Recipients' list includes 'User: Integration User', 'User: Rakesh Gupta', and 'User: Security User'. The 'Selected Recipients' list shows 'Email Field: Email'. The 'From Email Address' dropdown is set to 'Current User's email address'.

Edit Email Alert Save Save & New Cancel

Edit Email Alert ! = Required Information

Description Survey - Thank You Email

Unique Name Survey_Thank_You_Email i

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

Selected Recipients

Email Field: Email

Add
Remove

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. i

Save Save & New Cancel

Step 4.1: Salesforce Flow — Create a Screen that Allow Users to Fill Survey

1. Click **Setup**.

2. In the Quick Find box, type **Flows**.
3. Select **Flows** then click on the **New Flow**.
4. Select the **Screen Flow** option and click on **Next** and configure the flow as follows:
 1. **How do you want to start building: Freeform**
5. We will use the **Screen** element to capture a **Survey response** form. Drag and drop a **Screen** element onto the canvas.

Step 4.2: Salesforce Flow — Add a Record Creates Element to Save Survey Response

1. Drag-and-drop the **Create Records** element onto the Flow designer.
2. Enter a name in the **Label (Save Response)** field; the **API Name** will auto-populate.
3. For **How Many Records to Create** – select **One**.
4. For **How to Set the Record Fields** – select **Use separate resources, and literal values**.
5. Select the **Survey_Result__c** object from the dropdown list.
6. **Set Field Values for the Survey Result**
 1. Row 1:
 1. **Field: Comment__c**

2.Value: {!Comment}

2.Click Add Row

3.Row 2:

1.Field: Email__c

2.Value: {!Email.value}

4.Click Add Row

5.Row 3:

1.Field: Name__c

**2.Value: {!Name.firstName}
 {!Name.lastName}**

6.Click Add Row

7.Row 3:

1.Field: Rating__c

2.Value: {!Rating}

7.Click Done.

Edit Create Records

Create Salesforce records using values from the flow.

* Label
Save Response

* API Name
Save_Response

Description

How Many Records to Create

☒ One
☐ Multiple

How to Set the Record Fields

☐ Use all values from a record
☒ Use separate resources, and literal values

Create a Record of This Object

* Object
Survey Result

Set Field Values for the Survey Result

Field
Comment__c

←
Value
Comment

Field
Email__c

←
Value
Email > Value

Field
Name__c

←
Value
(!Name.firstName) (!Name.lastName)

Field
Rating__c

←
Value
Rating

+ Add Field

☐ Manually assign variables

Cancel Done

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

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

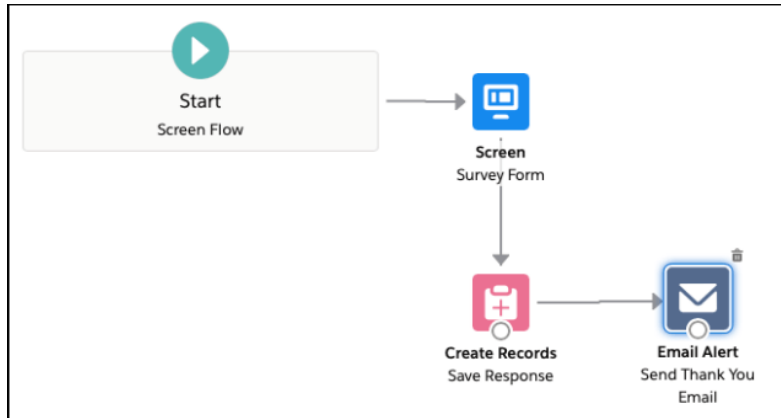
1. Under **Toolbox**, select **Element**.
2. Drag-and-drop **Action** element onto the Flow designer.
3. In the **Action** box, type **Survey – Thank You Email**.

4. Clicks on the **Survey – Thank You Email** email alert.

5. Click **Done**.

The screenshot shows a configuration window titled "Edit 'Survey - Thank You Email' email alert". It includes a header with instructions: "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." Below this, there are two input fields: "Label" with the value "Send Thank You Email" and "API Name" with the value "Send_Thank_You_Email". A "Description" field is also present. Under the "Set Input Values" section, there is a field for "Record ID" with the value "{!Save_Response}". At the bottom right, there are "Cancel" and "Done" buttons.

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



1. Click **Save**.

2. Enter **Flow Label** the **API Name** will auto-populate.

3. Click **Show Advanced**.

4. How to Run the Flow: User or System Context—Depends on How Flow is Launched

5. Type: Screen Flow

6. API Version for Running the Flow: 51

**7. Interview Label: Survey
{!\$Flow.CurrentDateTime}**

8. Click Save.

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

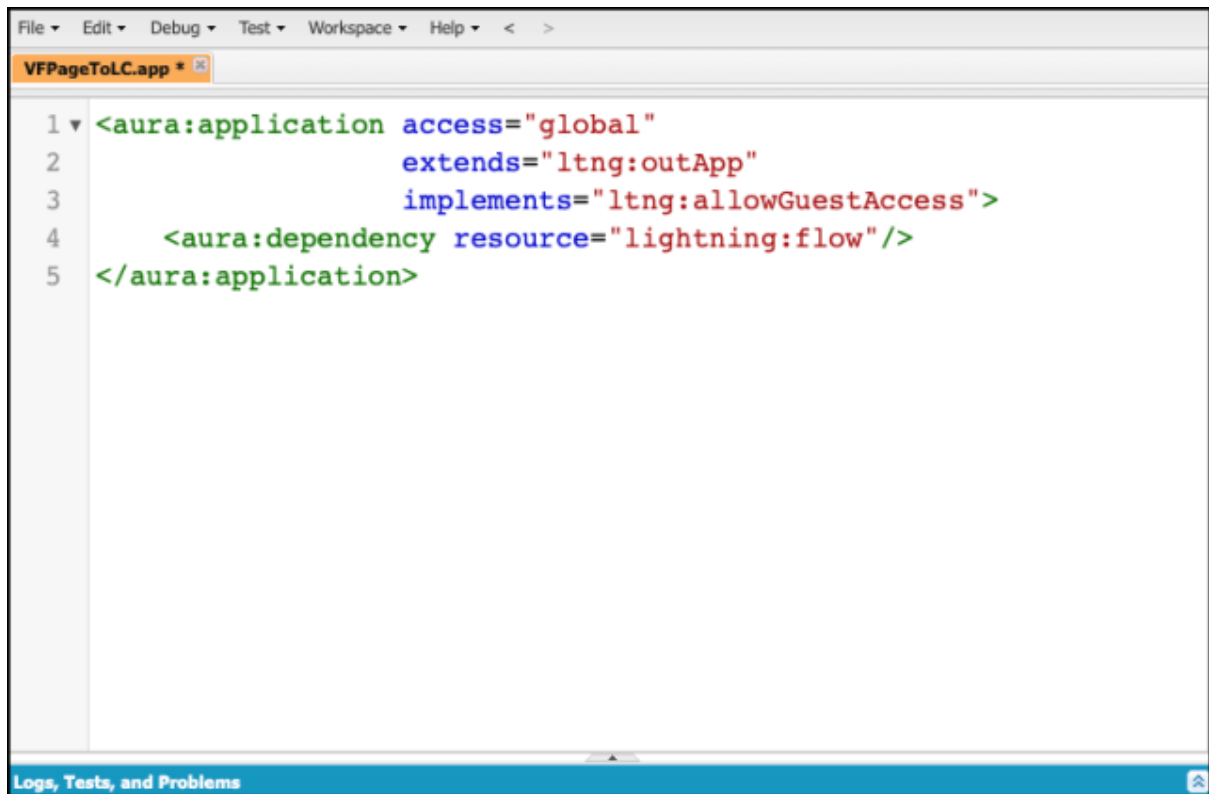
Cancel

Save

Step 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.



```
1 <aura:application access="global"
2     extends="ltng:outApp"
3     implements="ltng:allowGuestAccess">
4     <aura:dependency resource="lightning:flow"/>
5 </aura:application>
```

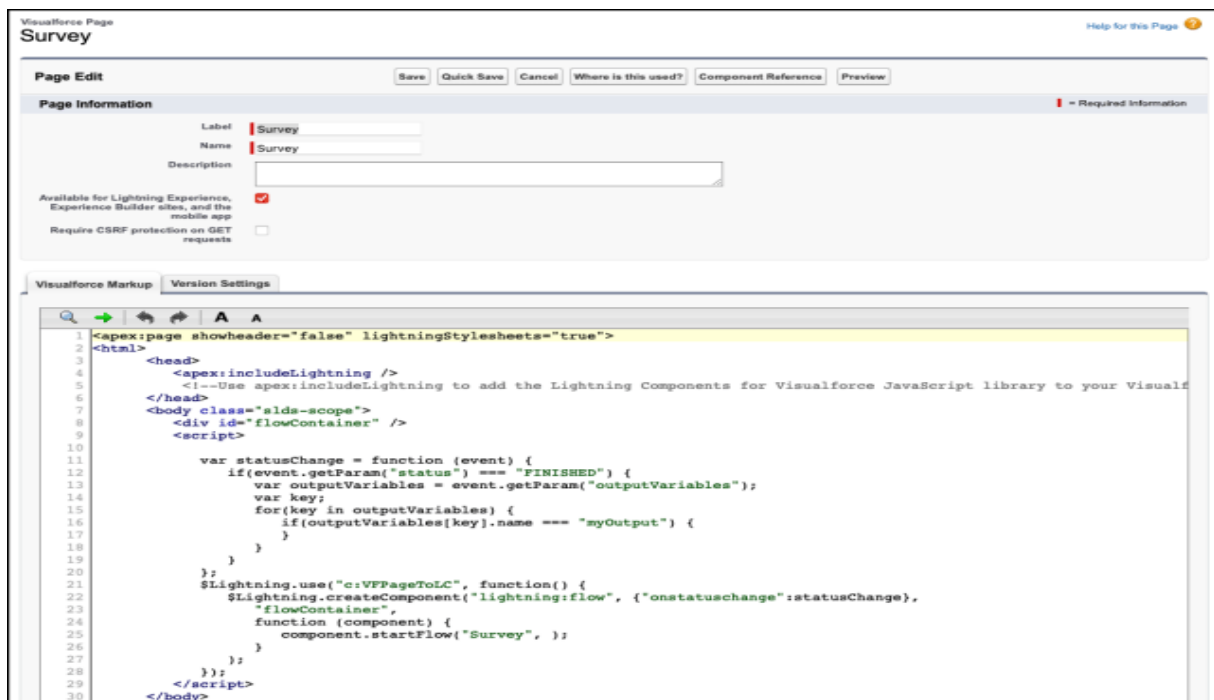
Step 6: Create a Visualforce Page and Embed Your Flow Into It

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

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

component on the page
using **\$Lightning.createComponent()**

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



Step 7: Create a Force.com Site to Open Your Flow for Unauthenticated Access

Now we will create a site to open the flow for unauthenticated access.

1. Click **Setup**.

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

Site Edit [Save] [Cancel]

Site Label: Survey [i]

Site Name: Survey [i]

Site Description: [Text Area]

Site Contact: Rakesh Gupta [i]

Default Record Owner: Rakesh Gupta [i]

Default Web Address: http://katihar-developer-edition.gus.force.com/ survey [i]

Active: ☒ [i]

Active Site Home Page: Survey [Preview] [i]

Inactive Site Home Page: InMaintenance [Preview] [i]

Site Template: SiteTemplate [i]

Site Robots.txt: [Text Field] [i]

Site Favorite Icon: [Text Field] [i]

Analytics Tracking Code: [Text Field] [i]

URL Rewriter Class: [Text Field] [i]

Enable Feeds: ☐

Clickjack Protection Level: Allow framing by the same origin only (Recommended) [i]

Require Secure Connections (HTTPS): ☒ [i]

Lightning Features for Guest Users: ☒ [i]

Upgrade all requests to HTTPS: ☒ [i]

Enable Content Sniffing Protection: ☒ [i]

Enable Browser Cross Site Scripting Protection: ☒ [i]

Referrer URL Protection: ☒ [i]

Guest Access to the Payments API: ☐ [i]

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:

Survey

Name

First Name

Alok

Last Name

Sinfal

* Email

* Rating

5

* Comment

Awesome Blog

Next

After successful submission, he/she will receive an email.

Thank You For Completing Our Survey!

Survey Site Guest User

via

bj9amq6fe7r1b-cdzwmaa.gs0.bnc.salesforce.com

8:09 PM (1 minute ago)

to me

Hi Alok Sinfal,

Thanks for taking time out to participate in our survey. We are very appreciative of the time you have taken to assist in our analysis, and commit to utilizing the information gained to contemplate and implement worthwhile improvements. We will share these results with you through your State Survey Agency, whom we also thank for their generous participation.

Once again, we are extremely grateful for your contributing your valuable time, your honest information, and your thoughtful suggestions.

Thanks,
Automation Champion

Reply

Forward