

# ASSIGNMENT

## SUBMITTED BY

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**NMID:** 5E718F4D1423BFB8E224CF41E9B5EFDE

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

The screenshot shows the 'New Custom Object' page in Salesforce Setup. The 'Custom Object Definition Edit' section is active. Under 'Custom Object Information', the 'Label' field is 'Role' (Example: Account), the 'Plural Label' is 'Roles' (Example: Accounts), and the 'Object Name' is 'Role' (Example: Account). The 'Starts with vowel sound' checkbox is unchecked. A yellow message bar at the top states: 'Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more!](#) [Don't show this message again](#)'. At the bottom, there are links for 'Context-Sensitive Help Setting' and 'Open the standard Salesforce.com Help & Training window'.

The screenshot shows the 'New Custom Object' page in Salesforce Setup. The 'Custom Object Definition Edit' section is active. Under 'Custom Object Information', the 'Label' field is 'Nick Name' (Example: Account), the 'Plural Label' is 'Nick Names' (Example: Accounts), and the 'Object Name' is 'Nick\_Name' (Example: Account). The 'Starts with vowel sound' checkbox is unchecked. A yellow message bar at the top states: 'Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more!](#) [Don't show this message again](#)'. At the bottom, there are links for 'Context-Sensitive Help Setting' and 'Open the standard Salesforce.com Help & Training window'.

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Setup > OBJECT MANAGER

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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.

☐ Checkbox

Allows users to select a True (checked) or False (unchecked) value.

☐ Currency

Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to

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Step 2. Choose the related object

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Cancel

Select the other object to which this object is related.

Related To

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Help for this Page

Step 3. Enter the label and name for the lookup field

Step 3 of 6

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Field Label

Role

Field Name

Role

Description

Help Text

Child Relationship Name

Nick\_Names

Sharing Setting

☐ Read Only: Allows users with at least Read access to the Master record to create, edit, or delete related Detail records.

☒ Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.

Allow reparenting

☐ Child records can be reparented to other parent records after they are created

Auto add to custom report type

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

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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

Select one of the data types below.

☐ None Selected

☐ 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.

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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.
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- 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.

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New Custom Field

Help for this Page

Step 2. Enter the details

Step 2 of 5

Field Label

Record Count

Field Name

Record\_Count

Description

Help Text

Auto add to custom report type

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

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New Custom Field

Help for this Page

Step 3. Define the summary calculation

Step 3 of 5

Select Object to Summarize

Required Information

Master Object

Summarized Object

Role

Nick Names

Select Roll-Up Type

☒ COUNT

☐ SUM

☐ MIN

☐ MAX

Field to Aggregate

None

Filter Criteria

☒ All records should be included in the calculation

☐ Only records meeting certain criteria should be included in the calculation

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Select Object to Summarize

Master Object: Role

Summarized Object: Nick Names

Select Roll-Up Type

COUNT

SUM

MIN

MAX

Field to Aggregate: --None--

Filter Criteria

All records should be included in the calculation

Only records meeting certain criteria should be included in the calculation

Field	Operator	Value	
Nick Name Name	equals	0	AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND

For checkbox fields, enter a value of True for checked or False for not checked. For picklist fields, enter the master picklist field value in your corporate language.

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Role Custom Field

Record Count

Back to Role

Help for this Page

Custom Field Definition Detail

Edit

Set Field-Level Security

View Field Accessibility

Where is this used?

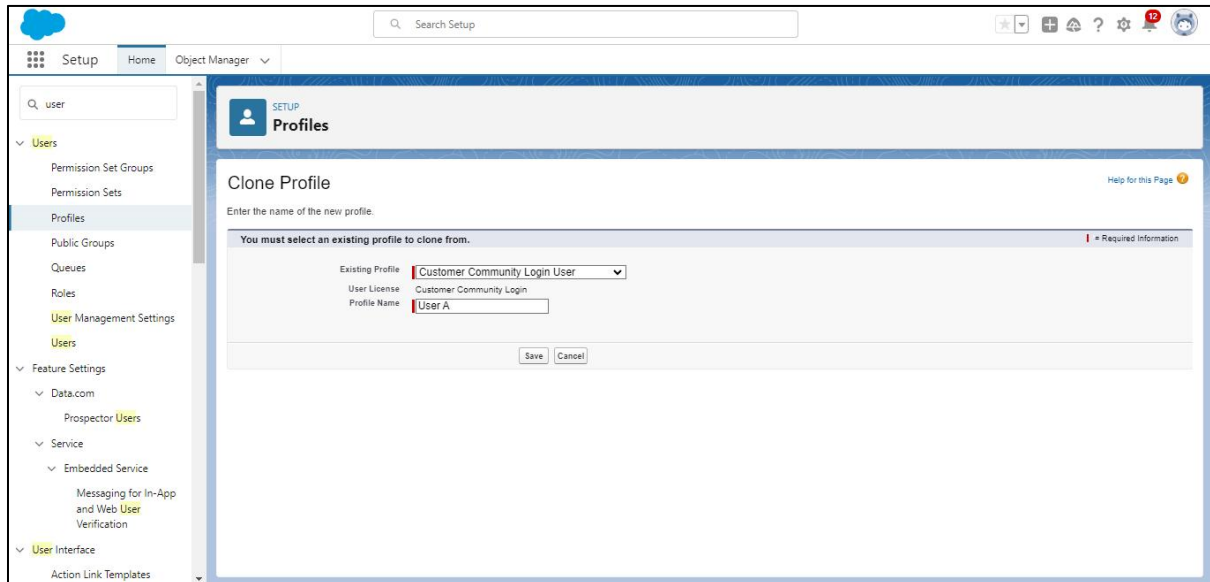
Field Information

Field Label	Record Count	Object Name	Role
Field Name	Record_Count		
API Name	Record_Count__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Mubashir P.A. 02/11/2023, 1:41 pm	Modified By	Mubashir P.A. 02/11/2023, 1:41 pm

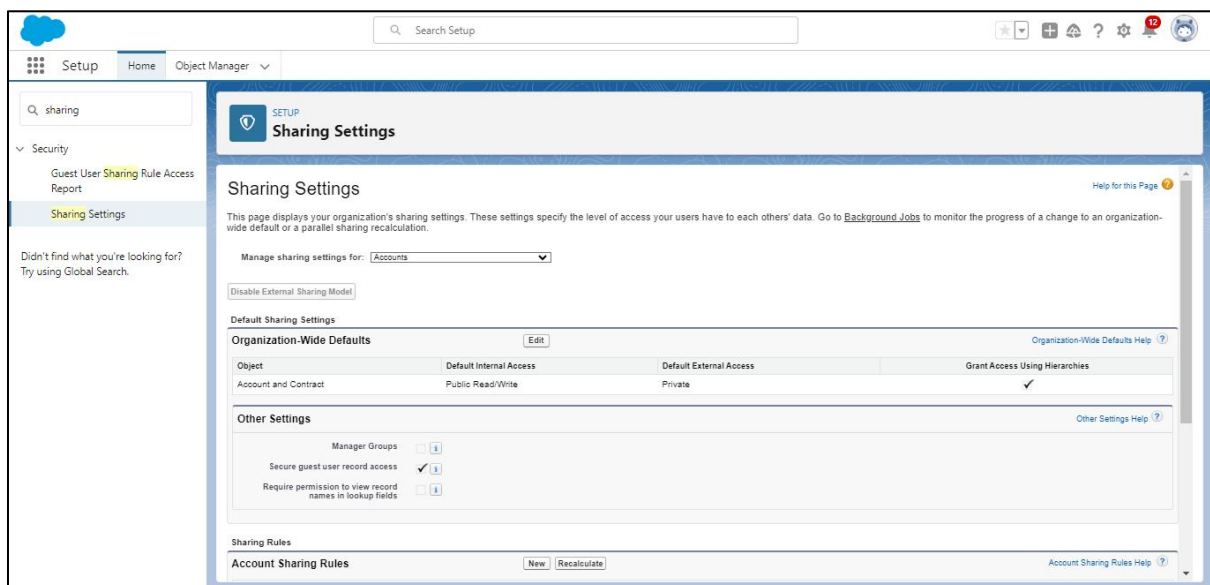
Roll-Up Summary Options

Data Type	Roll-Up Summary	Summary Type
Summarized Object	Nick Name	COUNT
Filter Criteria	Nick Name Name EQUALS 0	

2. If there is 2 user, User A and User B in the organization 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.



The screenshot shows the Salesforce Setup interface. The left sidebar contains a navigation menu with categories like Users, Feature Settings, and User Interface. The 'Profiles' link under the 'Users' category is selected. The main content area is titled 'Clone Profile' and prompts the user to 'Enter the name of the new profile.' Below this, a message states 'You must select an existing profile to clone from.' There are three input fields: 'Existing Profile' (a dropdown menu showing 'Customer Community Login User'), 'User License' (a text field with 'Customer Community Login'), and 'Profile Name' (a text field with 'User A'). 'Save' and 'Cancel' buttons are at the bottom.



The screenshot shows the Salesforce Setup interface with the 'Sharing Settings' page selected. The left sidebar shows the 'Sharing Settings' link under the 'Security' category. The main content area is titled 'Sharing Settings' and includes a description: 'This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data. Go to [Background Jobs](#) to monitor the progress of a change to an organization-wide default or a parallel sharing recalculation.' A dropdown menu 'Manage sharing settings for:' is set to 'Accounts'. Below this is a 'Default Sharing Settings' section with a table of 'Organization-Wide Defaults'. The table has columns for 'Object', 'Default Internal Access', 'Default External Access', and 'Grant Access Using Hierarchies'. The 'Account and Contract' object is listed with 'Public Read/Write' internal access, 'Private' external access, and 'Grant Access Using Hierarchies' checked. Below the table is an 'Other Settings' section with three checkboxes: 'Manager Groups' (unchecked), 'Secure guest user record access' (checked), and 'Require permission to view record names in lookup fields' (unchecked). At the bottom, there is a 'Sharing Rules' section with a table of 'Account Sharing Rules' and buttons for 'New' and 'Recalculate'.

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Account and Contract	Public Read/Write	Private	✓

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profile

Users

Profiles

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

SETUP

Profiles

Clone Profile

Help for this Page

Enter the name of the new profile.

You must select an existing profile to clone from.

Existing Profile

Customer Community Plus User

User License

Customer Community Plus

Profile Name

User B

Save

Cancel

Setup

Home

Object Manager

Search Setup

sharin

Security

Guest User Sharing Rule Access Report

Sharing Settings

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

SETUP

Sharing Settings

Note: "Roles and subordinates" includes all users in a role, and the roles below that role.  
You can use sharing rules only to grant wider access to data, not to restrict access.

Step 1: Rule Name

Label

User A

Rule Name

User\_A

Description

Step 2: Select your rule type

Rule Type

☒ Based on record owner

☐ Based on criteria

Step 3: Select which records to be shared

Role: owned by members of

Roles

Customer Support, International

Step 4: Select the users to share with

Share with

Roles

Customer Support, International

Step 5: Select the level of access for the users

Access Level

Read Only

Save

Cancel



Setup

Home

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Search Setup

profile

Users

Profiles

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

Account Field-Level Security for profile

User B

Edit

Back to Profile

Field Name	Field Type	Read Access	Edit Access
Account Name	Name	✓	✓
Account Number	Text	✓	✓
Account Owner	Lookup	✓	✓
Account Site	Text	✓	✓
Account Source	Picklist	✓	✓
Active	Picklist	✓	✓
Annual Revenue	Currency	✓	✓
Billing Address	Address	✓	✓
Clean Status	Picklist	✓	<input type="checkbox"/>
Created By	Lookup	✓	<input type="checkbox"/>
Customer Priority	Picklist	✓	✓
D&B Company	Lookup	✓	<input type="checkbox"/>
Data.com Key	Text	✓	✓
Description	Long Text Area	✓	✓
D-U-N-S Number	Text	✓	<input type="checkbox"/>
Einstein Account Tier	Text	✓	✓

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Users

Permission Set Groups

Permission Sets

Custom Code

Custom Permissions

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

Permission Sets

Create

Save

Cancel

Enter permission set information

Label

User A

API Name

User\_A

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

Salesforce Platform

Save

Cancel

Setup

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

SETUP

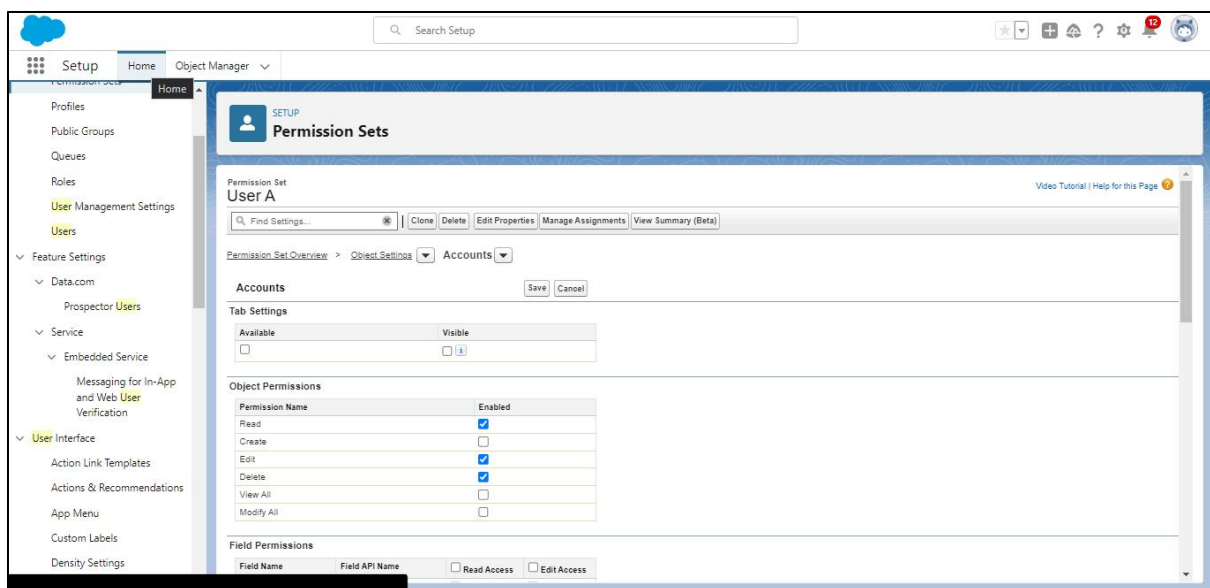
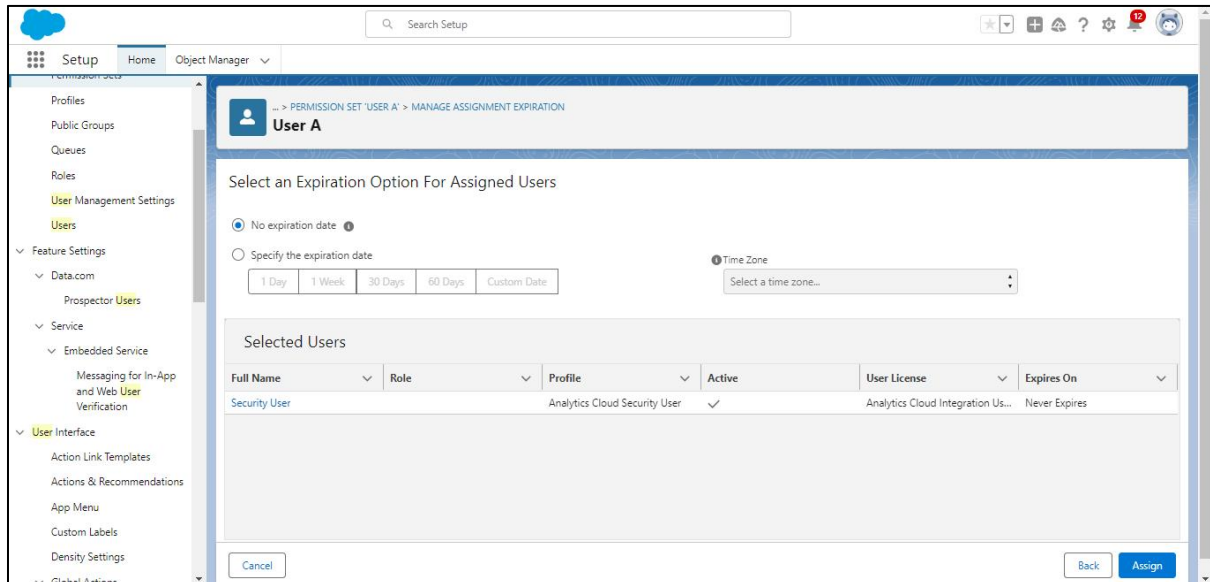
Account Field-Level Security for profile

User A

[Edit](#)
[Back to Profile](#)

Field Name	Field Type	Read Access	Edit Access
Account Name	Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Account Number	Text	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Account Owner	Lookup	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Account Site	Text	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Account Source	Picklist	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Active	Picklist	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Annual Revenue	Currency	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Billing Address	Address	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Clean Status	Picklist	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Created By	Lookup	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Customer Priority	Picklist	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
D&B Company	Lookup	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Data.com Key	Text	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Description	Long Text Area	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
D-U-N-S Number	Text	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Einstein Account Tier	Text	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

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.



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permission

Users

Permission Set Groups

Permission Sets

Custom Code

Custom Permissions

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

Select Users to Assign

All Users

1 item selected

Search this list...

Full Name

Alias


Username

Role

Active

Profile

☐

 Mubashir P A


MPA

mubashirpa@gscet.com

☒

System Administrator

☐

 Chatter Expert


Chatter

chatty.00d5j00000d3l8beav.osnx4bzidwt6@chatter.salesforce.com

☒

Chatter Free User

☐

 Integration User


integ

integration@00d5j00000d3l8beav.com

☒

Analytics Cloud Integra

☒

 Security User

sec

insightssecurity@00d5j00000d3l8beav.com

☒

Analytics Cloud Security

Cancel

Next

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

