

# Assignment

SUBMITTED BY :

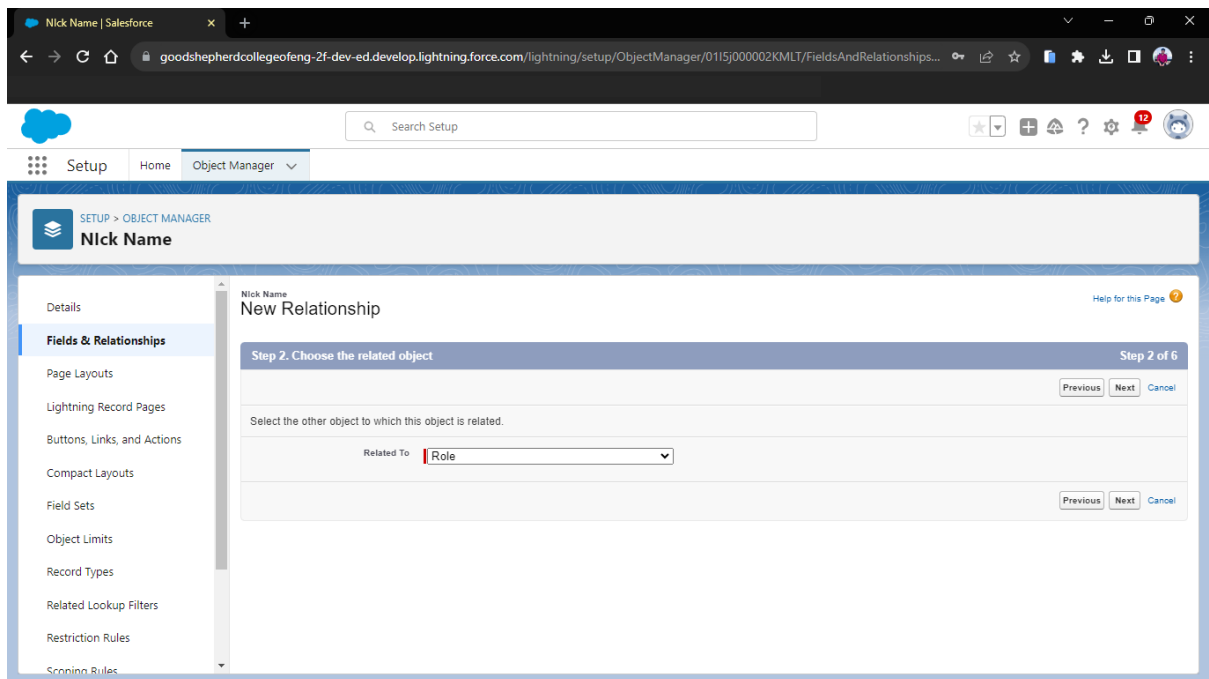
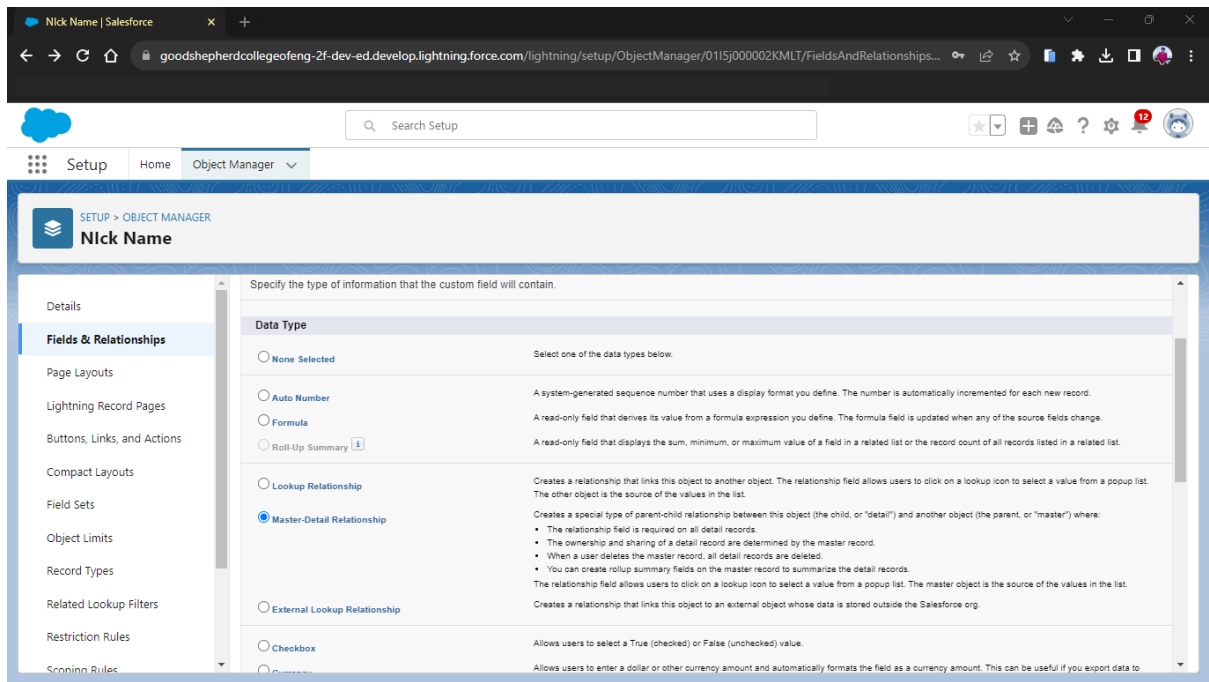
NAME : Abhiram Suresh

NM ID : 2DA7BECCFDB1F139745406C7BBD9C0E0

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. The browser address bar indicates the URL: `goodshepherdcollegeofeng-2f-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new`. The page title is 'New Custom Object'. A message 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](#)'. Below this, the 'Custom Object Definition Edit' section is visible, with tabs for 'Custom Object Information', 'Fields', 'Relationships', and 'Sharing'. The 'Custom Object Information' tab is active. It contains the following fields: 'Label' (Role), 'Plural Label' (Roles), 'Starts with vowel sound' (unchecked), 'Object Name' (Role), and 'Description' (empty). Examples provided are 'Example: Account' for the label and 'Example: Accounts' for the plural label. At the bottom, there are links for 'Context-Sensitive Help Setting' and 'Open the standard Salesforce.com Help & Training window'.

This screenshot is similar to the one above, showing the 'New Custom Object' page. The 'Label' field is now 'Nick Name', the 'Plural Label' is 'Nick Names', and the 'Object Name' is 'Nick\_Name'. The 'Example: Account' and 'Example: Accounts' text remains. The rest of the page structure, including the browser address bar and the top message, is identical to the previous screenshot.



Nick Name | Salesforce

goodshepherdcollegeofeng-2f-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115j000002KMLT/FieldsAndRelation...

Setup Home Object Manager

SETUP > OBJECT MANAGER

Nick Name

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Nick Name

New Relationship

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

Step 3 of 6

Field Label Role

Field Name Role

Description

Help Text

Child Relationship Name Nick\_Names

Sharing Setting

Select the minimum access level required on the Master record to create, edit, or delete related Detail records:

☐ 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

Role | Salesforce

goodshepherdcollegeofeng-2f-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115j000002KMLT/FieldsAndRelation...

Setup Home Object Manager

SETUP > OBJECT MANAGER

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Flow Triggers

Role

New Custom Field

Step 1. Choose the field type

Step 1

Specify the type of information that the custom field will contain.

Data Type

Select one of the data types below.

☐ None Selected

☐ Auto Number

☐ Formula

☒ Roll-Up Summary

☐ Lookup Relationship

☐ Master-Detail Relationship

A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

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.

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.

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.

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.

Role | Salesforce

goodshepherdcollegeofeng-2f-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115j000002KMLY/FieldsAndRelation...

Search Setup

Setup Home Object Manager

Role

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Fields & Relationships

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Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

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Flow Triggers

New Custom Field

Step 2. Enter the details

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

Previous Next Cancel

Role | Salesforce

goodshepherdcollegeofeng-2f-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115j000002KMLY/FieldsAndRelation...

Search Setup

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Flow Triggers

New Custom Field

Step 3. Define the summary calculation

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

Previous Next Cancel

Role | Salesforce

goodshepherdcollegeofeng-2f-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115j000002KMLY/FieldsAndRelation...

Search Setup

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Required Information

Select Object to Summarize

Master ObjectRole

Summarized ObjectNick 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

FieldOperatorValueAND

Nick Name Nameequals0

--None--

--None--

--None--

--None--

--None--

--None--

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.

PreviousNextCancel

Role | Salesforce

goodshepherdcollegeofeng-2f-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115j000002KMLY/FieldsAndRelation...

Search Setup

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Role Custom Field

Record Count

Back to Role

Help for this Page

Custom Field Definition Detail

EditSet Field-Level SecurityView Field AccessibilityWhere is this used?

Field Information

Field LabelRecord Count

Field NameRecord\_Count

Object NameRole

API NameRecord\_Count\_\_c

Description

Help Text

Data Owner

Field Usage

Data Sensitivity Level

Compliance Categorization

Created ByAbhiram Suresh02/11/2023, 1:41 pm

Modified ByAbhiram Suresh02/11/2023, 1:41 pm

Roll-Up Summary Options

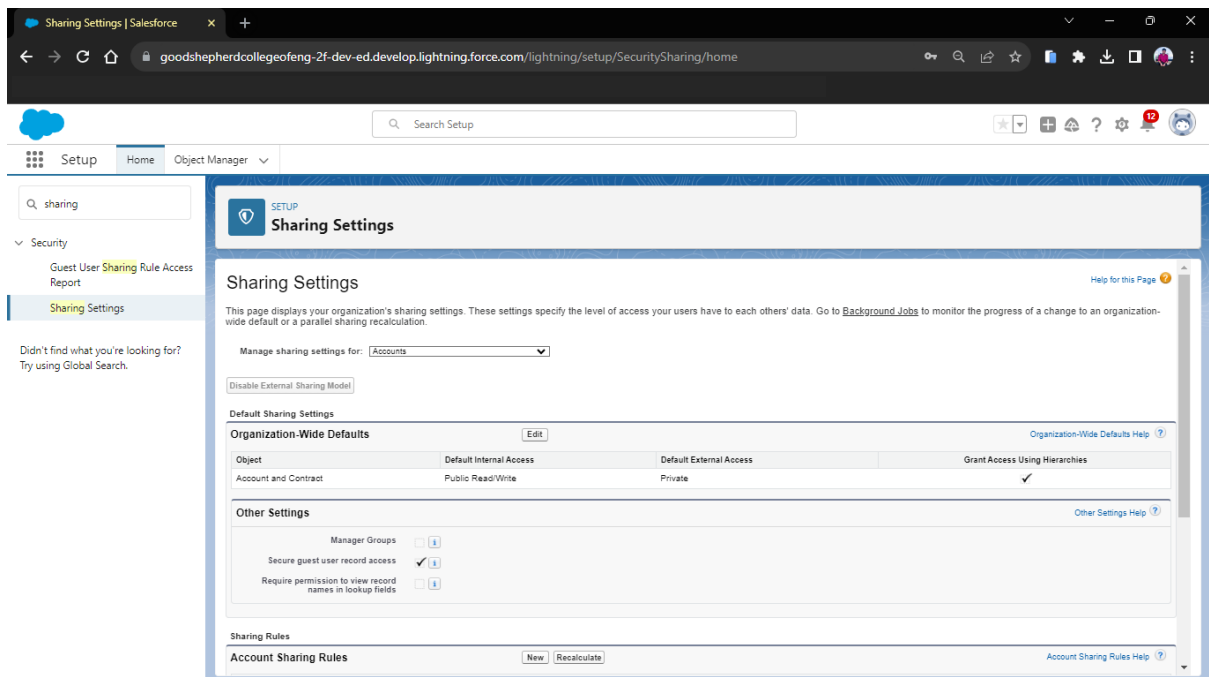
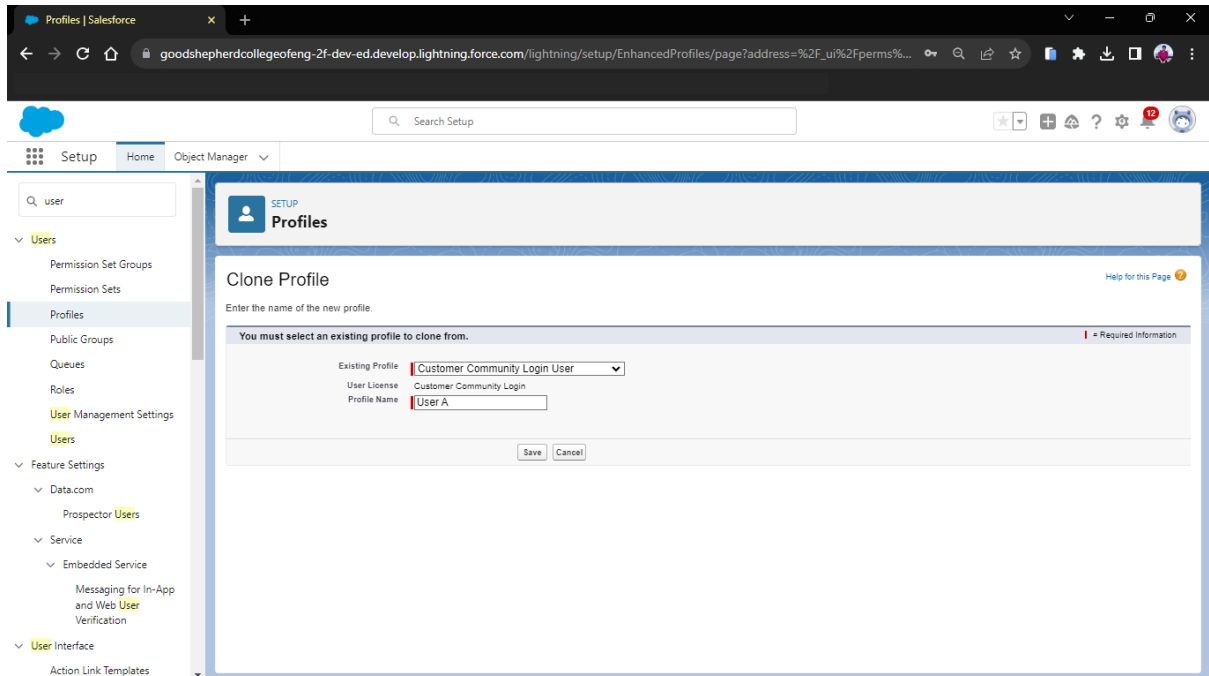
Data TypeRoll-Up Summary

Summary TypeCOUNT

Summarized ObjectNick Names

Filter CriteriaNick Name Name EQUALS 0

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.



Profiles | Salesforce

goodshepherdcollegeofeng-2f-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F\_ui%2Fperms%...

Search Setup

Setup Home Object Manager

profile

Users

Profiles

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

## SETUP Profiles

### Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from. Required Information

Existing Profile	Customer Community Plus User
User License	Customer Community Plus
Profile Name	User B

Save Cancel

Sharing Settings | Salesforce

goodshepherdcollegeofeng-2f-dev-ed.develop.lightning.force.com/lightning/setup/SecuritySharing/page?address=%2Fsetup%2Fown%...

Search Setup

Setup Home Object Manager

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** Required Information

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



Lightning Experience | Salesforce

goodshepherdcollegeofeng-2f-dev-ed.develop.lightning.force.com/lightning/setup/null/page?address=%2Fsetup%2Flayout%2Fdetail...

Search Setup

Setup Home Object Manager

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	<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"/>

Permission Sets | Salesforce

goodshepherdcollegeofeng-2f-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2Fudd%2FPermissionSet...

Search Setup

Setup Home Object Manager

permis

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

profile

Users

Profiles

Didn't find what you're looking for?

Try using Global Search.

SETUP

Account Field-Level Security for profile

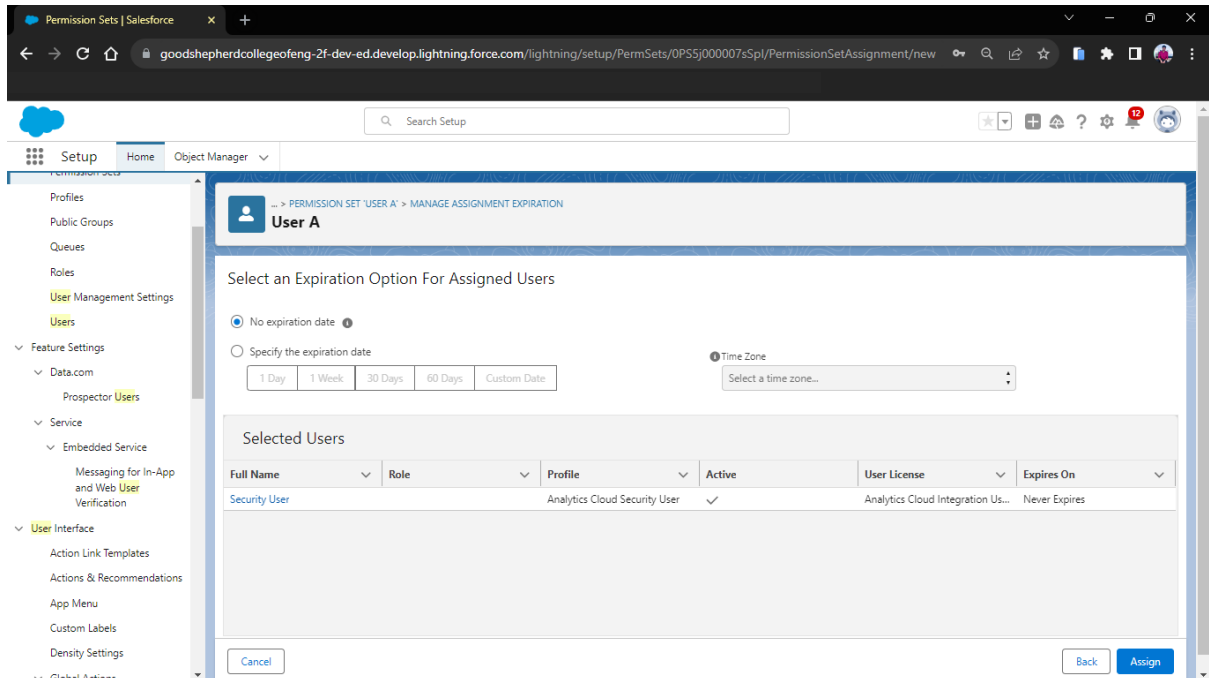
User A

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"/>
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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.



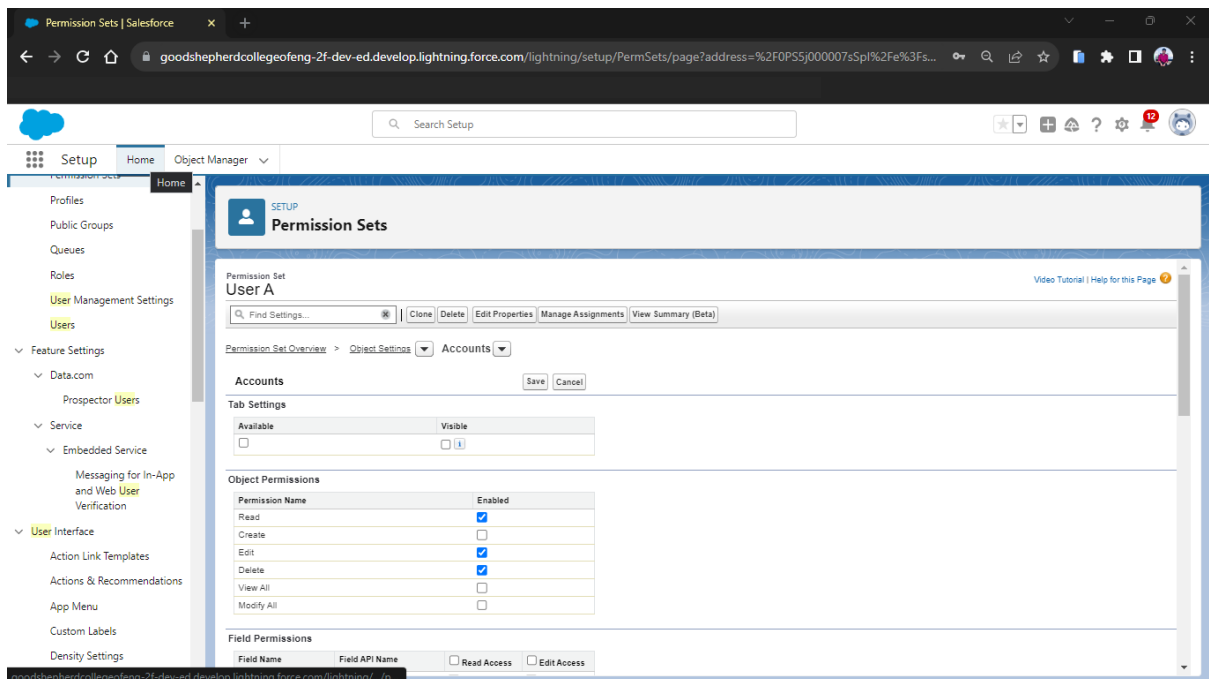
The screenshot shows the Salesforce Setup interface for managing assignment expiration for a user. The left sidebar contains the Setup menu with options like Profiles, Public Groups, Queues, Roles, User Management Settings, Users, Feature Settings, Data.com, Prospector Users, Service, Embedded Service, Messaging for In-App and Web User Verification, User Interface, Action Link Templates, Actions & Recommendations, App Menu, Custom Labels, Density Settings, and Global Actions.

The main content area is titled "User A" and "PERMISSION SET 'USER A' > MANAGE ASSIGNMENT EXPIRATION". It displays the "Select an Expiration Option For Assigned Users" section. The "No expiration date" option is selected. Below this, there are buttons for "1 Day", "1 Week", "30 Days", "60 Days", and "Custom Date". A "Time Zone" dropdown menu is also present, showing "Select a time zone...".

The "Selected Users" table lists the following user:

Full Name	Role	Profile	Active	User License	Expires On
Security User		Analytics Cloud Security User	✓	Analytics Cloud Integration Us...	Never Expires

At the bottom, there are "Cancel", "Back", and "Assign" buttons.



The screenshot shows the Salesforce Setup interface for managing permission sets for a user. The left sidebar contains the Setup menu with options like Profiles, Public Groups, Queues, Roles, User Management Settings, Users, Feature Settings, Data.com, Prospector Users, Service, Embedded Service, Messaging for In-App and Web User Verification, User Interface, Action Link Templates, Actions & Recommendations, App Menu, Custom Labels, Density Settings, and Global Actions.

The main content area is titled "Permission Sets" and "User A". It displays the "Permission Set Overview" section. The "Accounts" tab is selected. The "Accounts" section shows the "Tab Settings" and "Object Permissions" for the "Accounts" object.

The "Tab Settings" section shows the "Available" and "Visible" checkboxes for the "Accounts" tab. The "Object Permissions" section shows the "Permission Name" and "Enabled" checkboxes for the "Accounts" object.

Permission Name	Enabled
Read	✓
Create	✓
Edit	✓
Delete	✓
View All	✓
Modify All	✓

At the bottom, there are "Field Permissions" and "Field API Name" sections.

Permission Sets | Salesforce

goodshepherdcollegeofeng-2f-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/0P55j000007sSpl/PermissionSetAssignment/new

Search Setup

Setup Home Object Manager

Profiles  
Public Groups  
Queues  
Roles  
User Management Settings  
Users

Feature Settings

Data.com  
Prospector Users

Service  
Embedded Service  
Messaging for In-App and Web User Verification

User Interface  
Action Link Templates  
Actions & Recommendations  
App Menu  
Custom Labels  
Density Settings  
Global Actions

PERMISSION SET 'USER A' > MANAGE ASSIGNMENT EXPIRATION

User A

Select Users to Assign

All Users

1 item selected

Search this list...

	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Abhiram Suresh	ASure	abhi_ram@gscet.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Chatter Expert	Chatter	chatty.00d5j00000d3l8beav.osnx4bzidwt6@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	Integration User	integ	integration@00d5j00000d3l8beav.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input checked="" type="checkbox"/>	Security User	sec	insightssecurity@00d5j00000d3l8beav.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

Cancel Next

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

