

Assignment

SUBMITTED BY :

NAME : Athul Raj

NM ID : 3C2E81BAA9447628B454DE30EB2C52E4

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 Salesforce 'New Custom Object' setup page. The breadcrumb navigation includes 'Setup', 'Home', and 'Object Manager'. The page title is 'New Custom Object'. A message 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 is the 'Custom Object Definition Edit' section with 'Save', 'Save & New', and 'Cancel' buttons. The 'Custom Object Information' section includes: 'The singular and plural labels are used in tabs, page layouts, and reports.' with 'Label' as 'Role' (Example: Account) and 'Plural Label' as 'Roles' (Example: Accounts); 'Starts with vowel sound' is unchecked; 'The Object Name is used when referencing the object via the API.' with 'Object Name' as 'Role' (Example: Account); and a 'Description' text area. At the bottom, there are links for 'Context-Sensitive Help Setting' and 'Open the standard Salesforce.com Help & Training window'.

The screenshot shows the Salesforce 'New Custom Object' setup page with the same layout as the first image. The 'Label' field is 'Nick Name' (Example: Account) and the 'Plural Label' is 'Nick Names' (Example: Accounts). The 'Object Name' field is 'Nick_Name' (Example: Account). All other elements, including the navigation bar, message, and bottom links, are identical to the first screenshot.

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

Sharing Rules

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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Nick Name

New Relationship

Help for this Page

Step 2. Choose the related object

Step 2 of 6

Previous

Next

Cancel

Select the other object to which this object is related.

Related To

Role

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Avatar

Setup > OBJECT MANAGER

Nick Name

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Nick Name

New Relationship

Help for this Page

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

Step 3 of 6

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Next

Cancel

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

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Setup > OBJECT MANAGER

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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

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.

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New Custom Field

Help for this Page

Step 2. Enter the details

Step 2 of 5

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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

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Select Object to Summarize

Master Object

Summarized Object

Role

Nick Names

Required Information

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
--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.

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Flow Triggers

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?

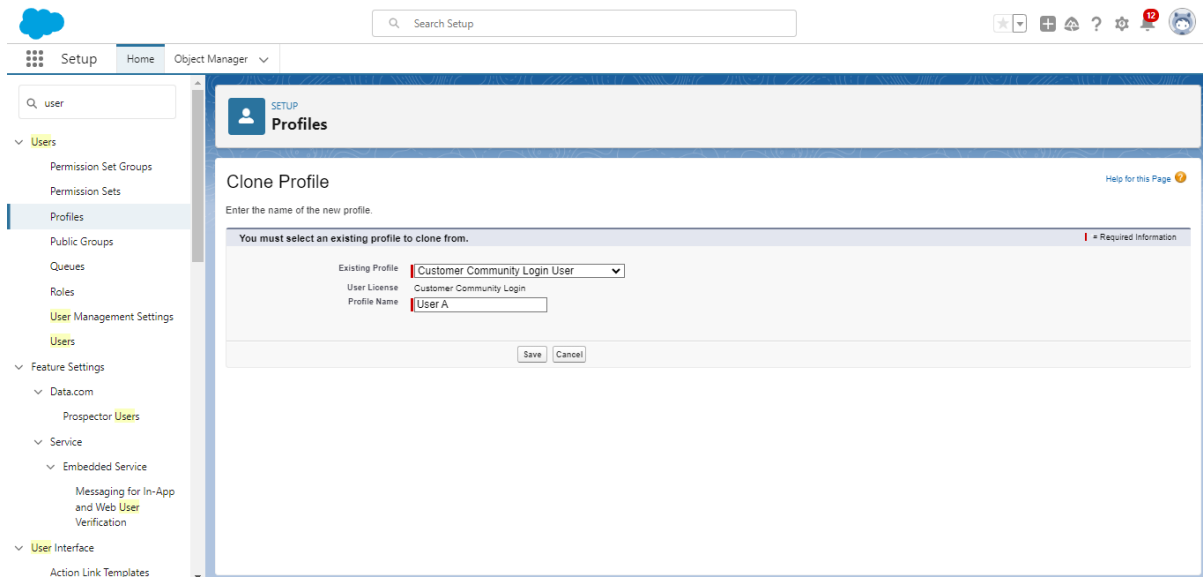
Field Information

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	Athul Raj	Modified By	Athul Raj
	02/11/2023, 1:45 pm		02/11/2023, 1:45 pm

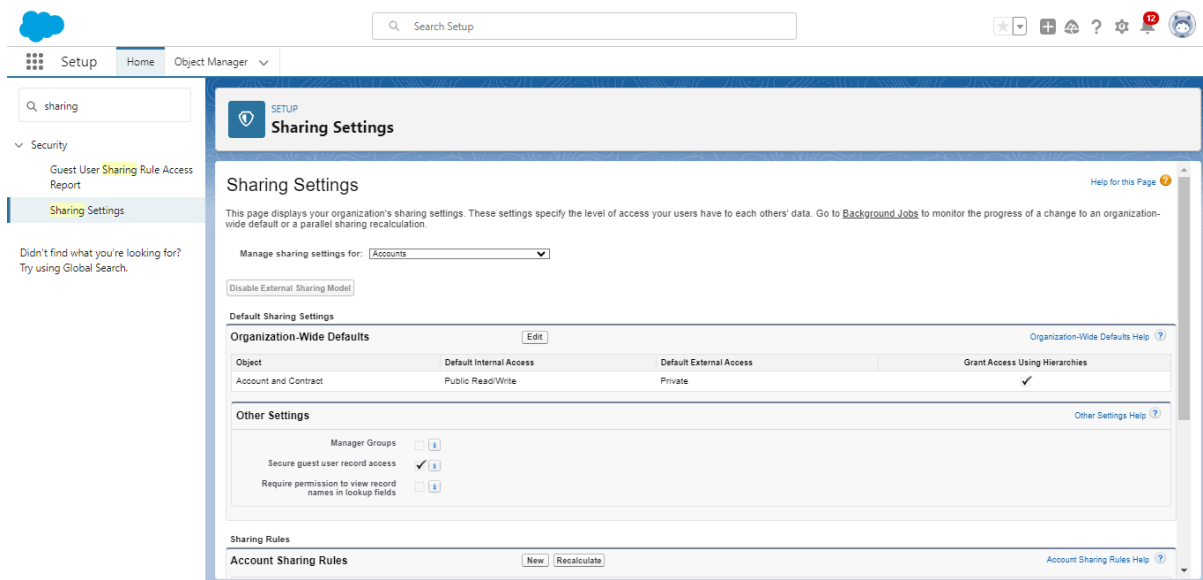
Roll-Up Summary Options

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



The screenshot shows the Salesforce Setup interface. The left sidebar contains a search bar with 'user' and a list of navigation items: Users, Permission Set Groups, Permission Sets, 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, and Action Link Templates. The main content area is titled 'SETUP Profiles' and displays the 'Clone Profile' dialog. The dialog prompts the user to 'Enter the name of the new profile.' and states 'You must select an existing profile to clone from.' It includes a dropdown for 'Existing Profile' (set to 'Customer Community Login User'), a text field for 'User License' (set to 'Customer Community Login'), and a text field for 'Profile Name' (set to 'User A'). 'Save' and 'Cancel' buttons are at the bottom.



The screenshot shows the Salesforce Setup interface with the 'Sharing Settings' page. The left sidebar is similar to the previous screenshot, but the search bar contains 'sharing' and the 'Sharing Settings' item is highlighted. The main content area is titled 'SETUP Sharing Settings' and provides information about organization-wide sharing settings. It includes a dropdown for 'Manage sharing settings for:' (set to 'Accounts') and a link to 'Disable External Sharing Model'. The 'Default Sharing Settings' section contains a table for 'Organization-Wide Defaults' and a section for 'Other Settings'.

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Account and Contract	Public Read/Write	Private	<input checked="" type="checkbox"/>

Other Settings

- Manager Groups: ☐ (1)
- Secure guest user record access: ☒ (1)
- Require permission to view record names in lookup fields: ☐ (1)

Sharing Rules

Account Sharing Rules: [New](#) [Recalculate](#) [Account Sharing Rules Help](#)

Setup

Home

Object Manager

Search Setup

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.

Existing Profile

User License

Profile Name

Customer Community Plus User

Customer Community Plus

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

Rule Name

Description

User A

User_A

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



Search Setup



Setup Home Object Manager

profile

Users

Profiles

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



SETUP

Account Field-Level Security for profile

User B

Help for this Page

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	✓	☐
Created By	Lookup	✓	☐
Customer Priority	Picklist	✓	✓
D&B Company	Lookup	✓	☐
Data.com Key	Text	✓	✓
Description	Long Text Area	✓	✓
D-U-N-S Number	Text	✓	☐
Einstein Account Tier	Text	✓	✓



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.



SETUP

Permission Sets

Permission Set

Create

Help for this Page

Save Cancel

Enter permission set information Required 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

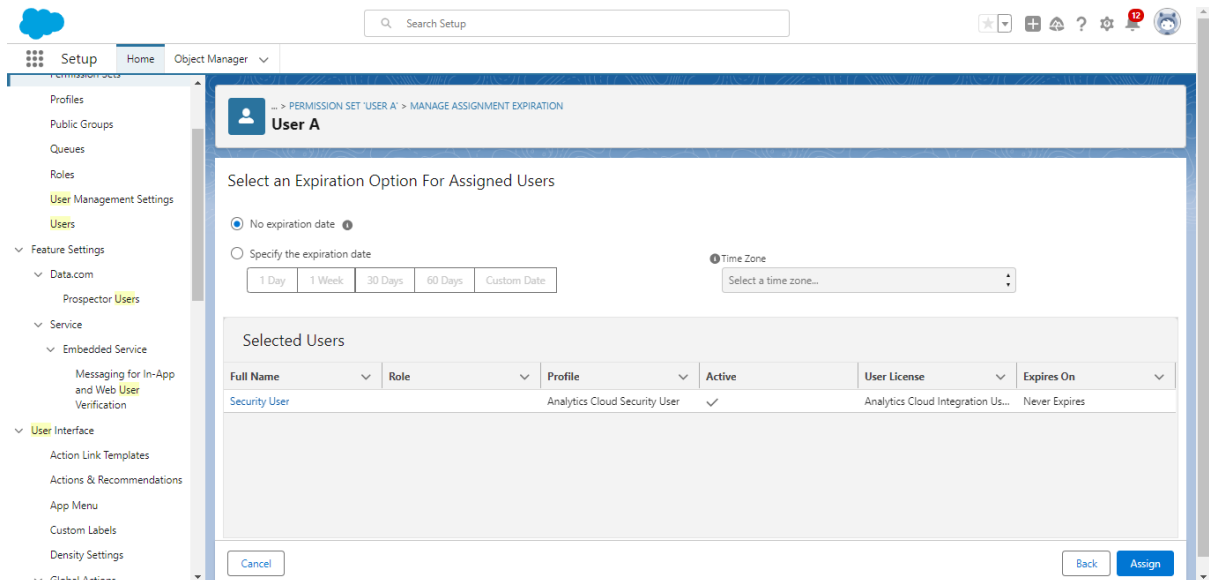
Account Field-Level Security for profile

User A

Help for this Page

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	✓	✓

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 'Manage Assignment Expiration' page for 'User A' in Salesforce Setup. The left sidebar contains navigation links for Profiles, Public Groups, Queues, Roles, User Management Settings, Users, Feature Settings, Data.com, 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 asks to 'Select an Expiration Option For Assigned Users' with two radio buttons: 'No expiration date' (selected) and 'Specify the expiration date'. Below these are buttons for '1 Day', '1 Week', '30 Days', '60 Days', and 'Custom Date'. A 'Time Zone' dropdown is also present. A table titled 'Selected Users' shows one user: 'Security User' with role 'Analytics Cloud Security User', profile 'Analytics Cloud Security User', active status, user license 'Analytics Cloud Integration Us...', and expires on 'Never Expires'. At the bottom are 'Cancel', 'Back', and 'Assign' buttons.

Setup Home Object Manager

Search Setup

PERMISSION SET 'USER A' > MANAGE ASSIGNMENT EXPIRATION

User A

Select an Expiration Option For Assigned Users

☒ No expiration date

☐ Specify the expiration date

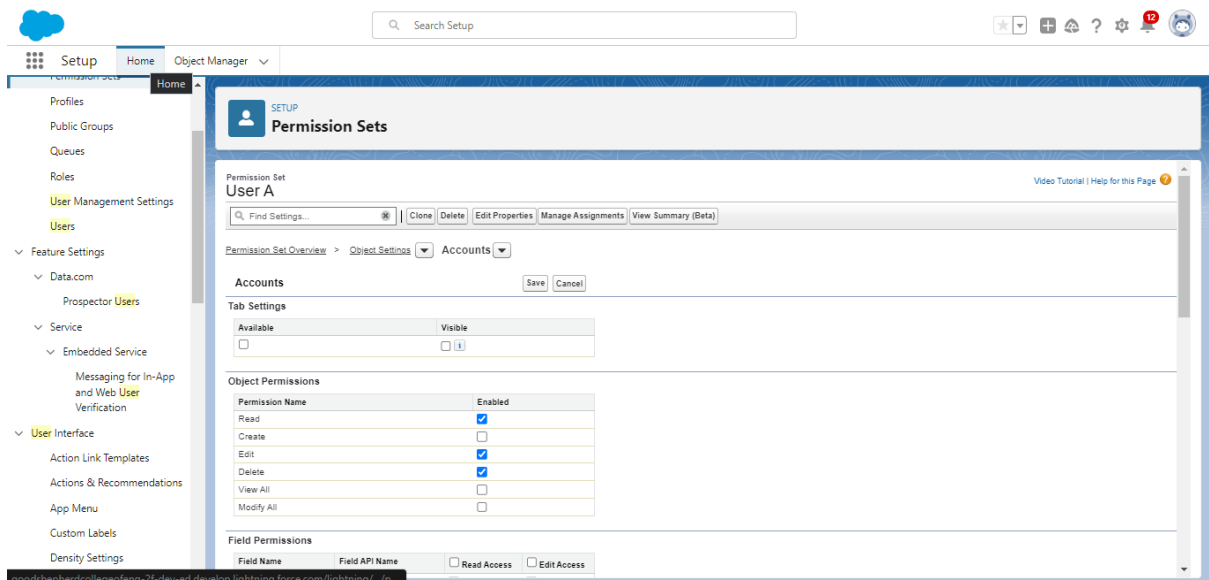
1 Day 1 Week 30 Days 60 Days Custom Date

Time Zone
Select a time zone...

Selected Users

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

Cancel Back Assign



The screenshot shows the 'Permission Sets' page for 'User A' in Salesforce Setup. The left sidebar is the same as the previous screenshot. The main content area is titled 'SETUP Permission Sets' and 'Permission Set User A'. It has a search bar 'Find Settings...' and buttons for 'Clone', 'Delete', 'Edit Properties', 'Manage Assignments', and 'View Summary (Beta)'. Below is a 'Permission Set Overview' section with tabs for 'Object Settings' and 'Accounts'. The 'Accounts' tab is selected, showing 'Available' and 'Visible' checkboxes. Below is the 'Object Permissions' section with a table of permissions for the 'Account' object. The 'Delete' permission is checked. At the bottom is the 'Field Permissions' section with a table of field permissions.

SETUP Permission Sets

Permission Set User A

Find Settings... Clone Delete Edit Properties Manage Assignments View Summary (Beta)

Permission Set Overview > Object Settings Accounts

Accounts

Available Visible

Object Permissions

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

Field Permissions

Field Name	Field API Name	Read Access	Edit Access
------------	----------------	-------------	-------------



Search Setup



Setup Home Object Manager

Search: perm

- 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

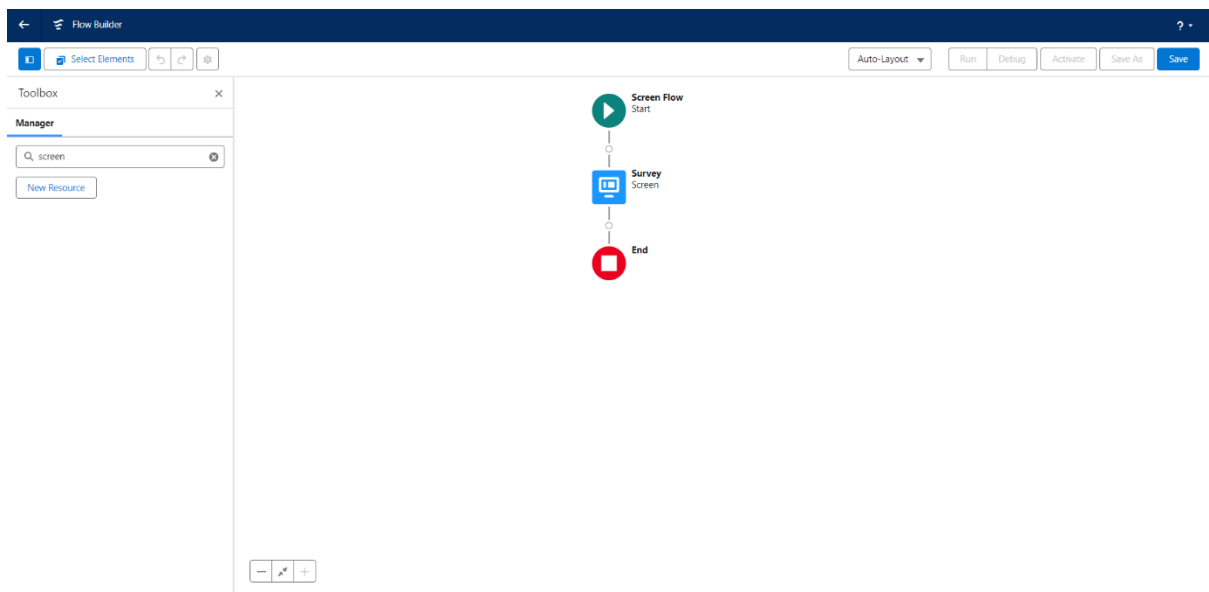
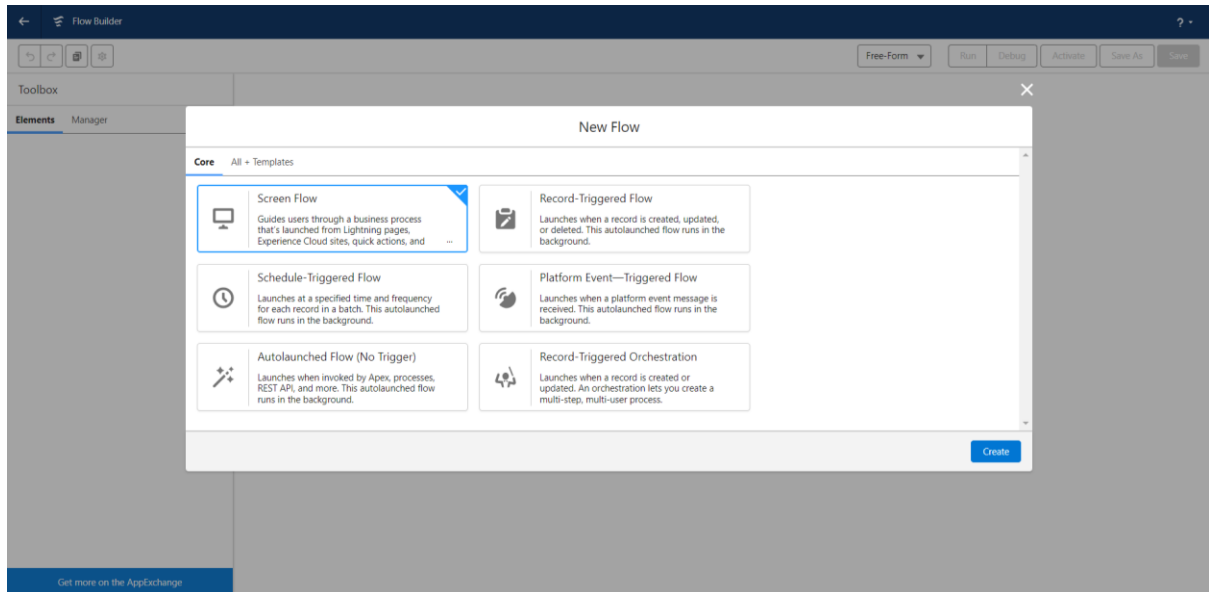
Search this list...

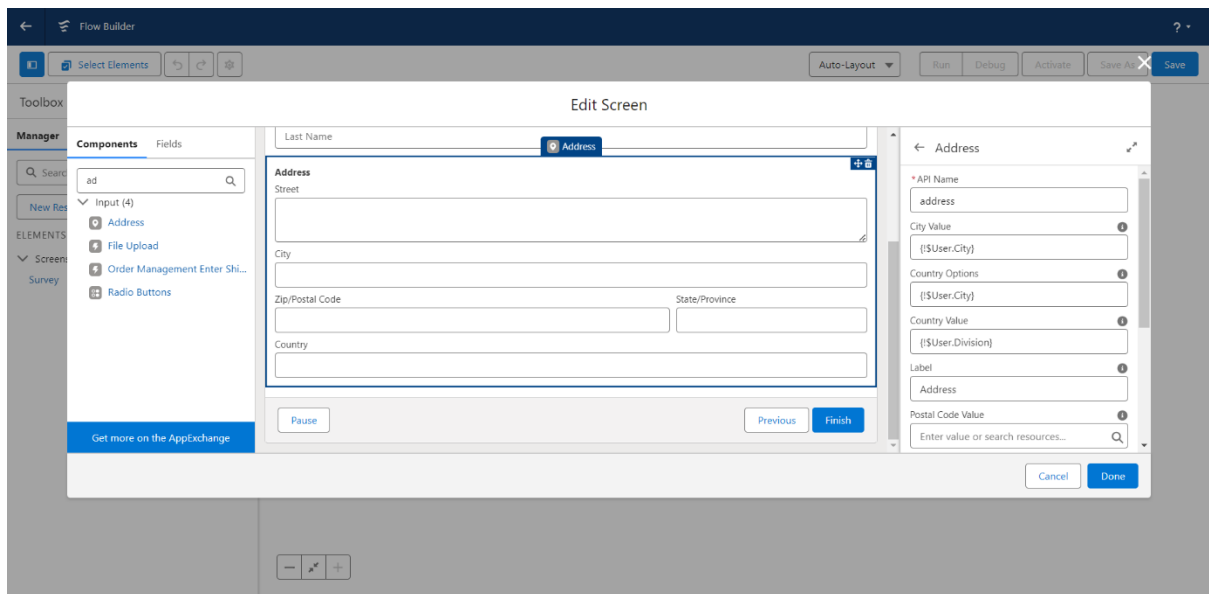
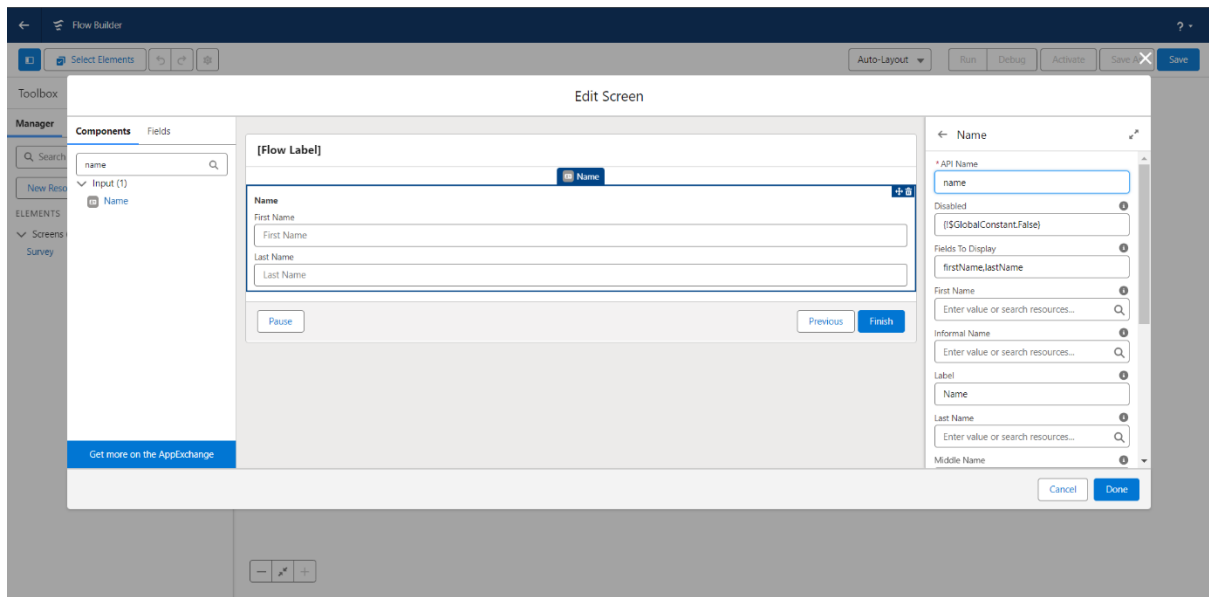
	Full Name ↑	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Athul Raj	ARaj	athulraj@gscet.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Chatter Expert	Chatter	chatty.00d5j00000d3l8beav.osnx4bzidwt6@chatter.salesforce.com		<input checked="" type="checkbox"/>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

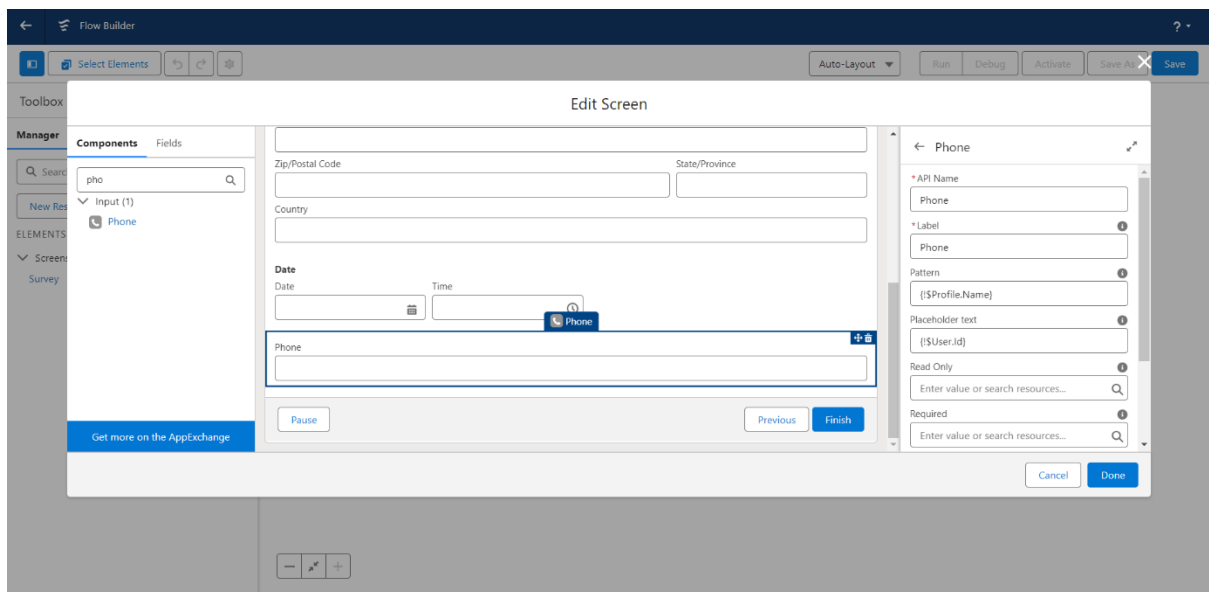
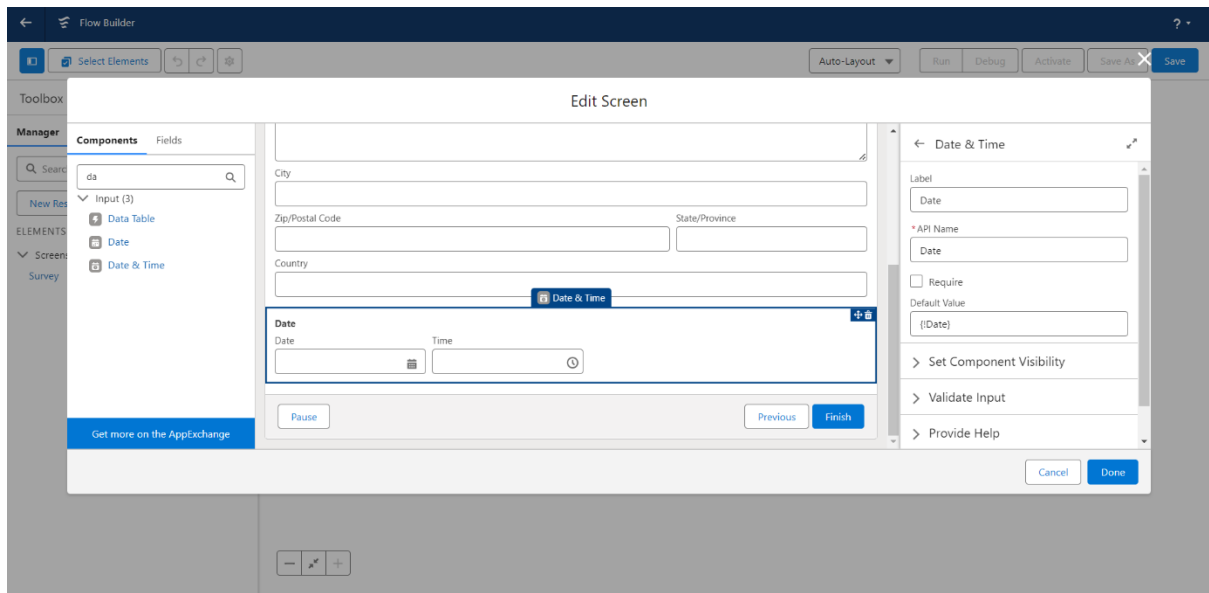
Cancel

Next

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







Flow Builder

Select Elements

↶ ↷ ⚙

Manager

Search this flow...

New Resource

RESOURCES

Screen Components (4)

address >

Date >

name >

Phone >

ELEMENTS

Screens (1)

Survey >

New Resource

* Resource Type

Variable

* API Name

user

Description

* Data Type

Number

Allow multiple values (collection)

Decimal Places

2

Default Value

Enter value or search resources...

Availability Outside the Flow

Available for input

Available for output

Cancel Done

⏪ ⏩ ⏴ ⏵

