

CRM Practical 4

Name. Harsha Hargunani

Batch. E1

Roll no. 09

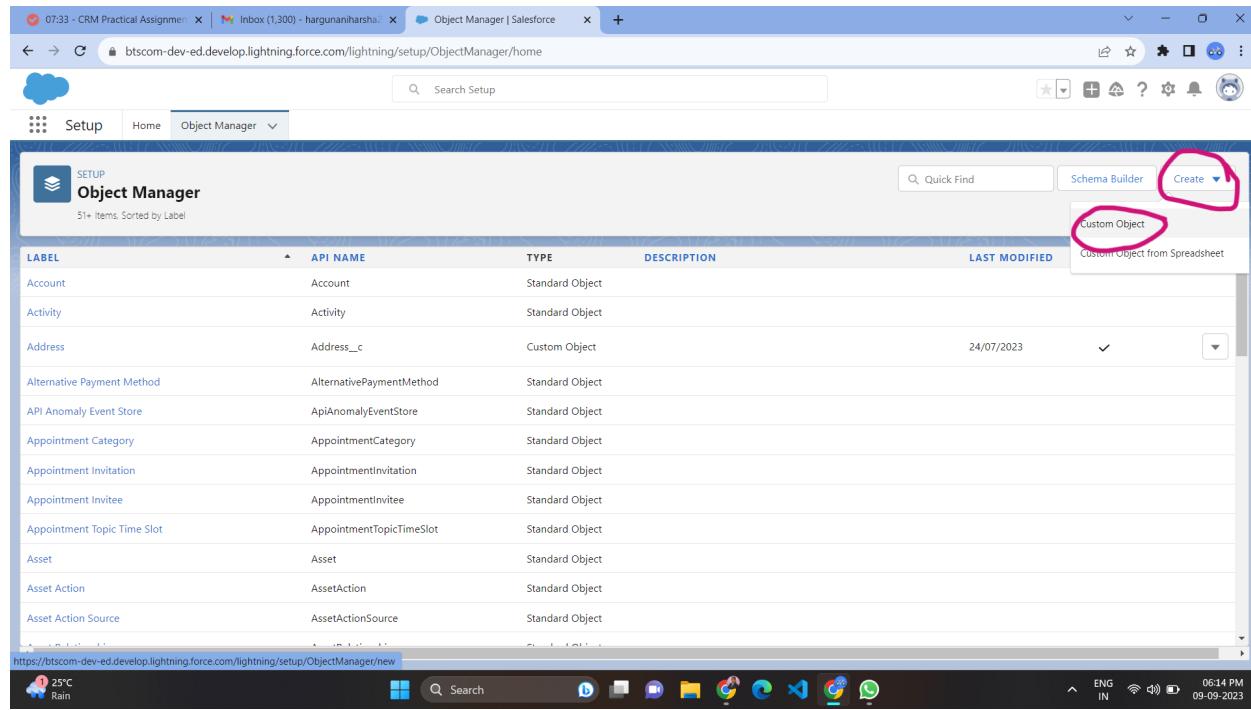
Salesforce Username - harsha@bts.com

Assignment Ques

Q1. Create two Objects "Student" and "Subject".

Ans.

1. Navigate to Setup | Object Manager | Create | Custom Objects



The screenshot shows the Salesforce Object Manager interface. At the top right, there is a 'Create' button with a dropdown arrow. This button is circled in red. Below it, there is a sub-menu with options: 'Custom Object' and 'Custom Object from Spreadsheet'. The main table lists various standard and custom objects with columns for Label, API Name, Type, Description, and Last Modified. The 'Custom Object' option is highlighted in the sub-menu.

Label	API NAME	TYPE	DESCRIPTION	LAST MODIFIED
Account	Account	Standard Object		
Activity	Activity	Standard Object		
Address	Address_c	Custom Object		24/07/2023
Alternative Payment Method	AlternativePaymentMethod	Standard Object		
API Anomaly Event Store	ApiAnomalyEventStore	Standard Object		
Appointment Category	AppointmentCategory	Standard Object		
Appointment Invitation	AppointmentInvitation	Standard Object		
Appointment Invitee	AppointmentInvitee	Standard Object		
Appointment Topic Time Slot	AppointmentTopicTimeSlot	Standard Object		
Asset	Asset	Standard Object		
Asset Action	AssetAction	Standard Object		
Asset Action Source	AssetActionSource	Standard Object		

2. Enter Field Label and description.

The screenshot shows the Salesforce Setup interface for editing a custom object named 'Student Details'. The 'Custom Object Information' section is active, displaying fields for 'Label' (set to 'Student Details'), 'Plural Label' (set to 'Students Details'), 'Object Name' (set to 'Student_Details'), and a 'Description' field which is currently empty. A 'Context-Sensitive Help Setting' dropdown is open, showing options to 'Open the standard Salesforce.com Help & Training window' (selected) or 'Open a window using a Visualforce page'. The right sidebar displays the user's profile ('Harsha Hargunani') and 'DISPLAY DENSITY' settings ('Comfy' selected). Other options like 'Compact' and 'Switch to Salesforce Classic' are also visible.

3. Enter Record Name - StudentID Data Type - Auto Number Display Format - {000}

Or Keep it "Full Name" - Text

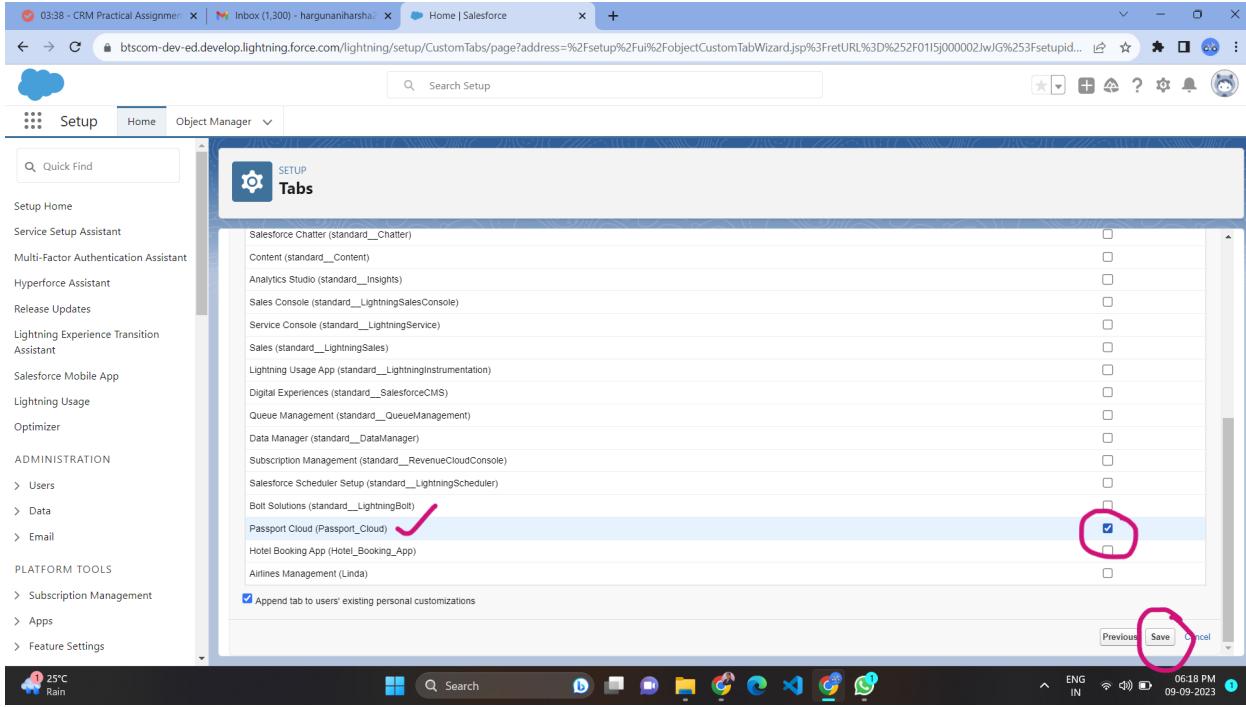
The screenshot shows the 'Enter Record Name Label and Format' section for the 'Student Details' object. The 'Record Name' field is set to 'StudentID' (Example: Account Name), 'Data Type' is 'Auto Number' (selected from a dropdown), and 'Display Format' is '{000}' (Example: A-{0000} What Is This?). The 'Optional Features' section contains checkboxes for 'Allow Reports' and 'Allow Activities', both of which are checked. The right sidebar shows the user's profile and 'DISPLAY DENSITY' settings ('Comfy' selected).

4. Check the “Allow Search” box and “Launch New Custom Tab Wizard” before saving.

The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. A modal window titled 'New Custom Object' is open, displaying various configuration options. On the left, under 'Deployment Status', the 'Deployed' radio button is selected. In the 'Search Status' section, the 'Allow Search' checkbox is checked. Under 'Object Creation Options', the 'Launch New Custom Tab Wizard after saving this custom object' checkbox is also checked. At the bottom of the modal are three buttons: 'Save', 'Save & New', and 'Cancel'. A user profile sidebar on the right shows the user's name, email, and account information, along with settings for 'DISPLAY DENSITY' (set to 'Comfy') and 'OPTIONS' (with links to 'Switch to Salesforce Classic' and 'Add Username').

5. Ensure the tab is added to the appropriate App.

The screenshot shows the Salesforce Setup interface with the 'Custom Tabs' tab selected. A modal window titled 'Step 3. Add to Custom Apps' is open, showing a list of standard Salesforce applications under 'Custom App'. To the right of each application name is a checkbox labeled 'Include Tab'. A red circle highlights the first checkbox in the list. At the top right of the modal, it says 'Step 3 of 3'. The left sidebar contains a navigation menu with categories like 'Setup Home', 'Service Setup Assistant', 'Multi-Factor Authentication Assistant', etc. The system tray at the bottom shows the date and time as 09-09-2023 and 06:42 PM.



6. Create Fields such as

Label	Field Return Type
Full Name	Text
Email ID	Email
Phone No	Phone

I have taken Full Name as a formula field, since I already had First Name and Last Name fields beforehand.

Formula = First_Name_c + " " + Last_Name_c

13:31 - CRM Practical Assignment | Inbox (1,300) - hargunaniharsha | Student Details | Salesforce | Recently Viewed | Subjects | Sales | +

Setup Home Object Manager

SETUP > OBJECT MANAGER

Student Details

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

List View Button Layout

Student Details Custom Field

Full Name

Back to Student Details

Custom Field Definition Detail

Edit Set Field-Level Security View Field Accessibility Where is this used?

Field Information

Field Label	Full Name
Field Name	Full_Name
API Name	Full_Name__c
Description	Help Text
Data Owner	Field Usage
Data Sensitivity Level	Compliance Categorization
Created By	Harsha Hargunani 09/09/2023, 6:55 pm
Modified By	Harsha Hargunani 09/09/2023, 6:55 pm

Object Name: Student Details

Formula Options

Data Type: Formula

First_Name__c + " " + Last_Name__c

Display Density: Comfy

Options: Switch to Salesforce Classic, Add Username

Harsha Hargunani
btscom-dev-ed.develop.my.salesforce.com
Settings Log Out

25°C Rain

ENG IN 06:56 PM 09-09-2023

7. Create a new Custom Object “Subject” following the same instructions. Keep the Record Format “Text” here and Label as “Subject Name”.

05:31 - CRM Practical Assignment | Inbox (1,300) - hargunaniharsha | New Custom Object | Salesforce | +

Setup Home Object Manager

New Custom Object

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](#)

Custom Object Definition Edit

Save Save & New Cancel

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label	Subject	Example: Account
Plural Label	Subjects	Example: Accounts
Starts with vowel sound	<input type="checkbox"/>	

The Object Name is used when referencing the object via the API.

Object Name	Subject	Example: Account
-------------	---------	------------------

Description: Passport Cloud Object 4

Context-Sensitive Help Setting: Open the standard Salesforce.com Help & Training window (radio button selected)

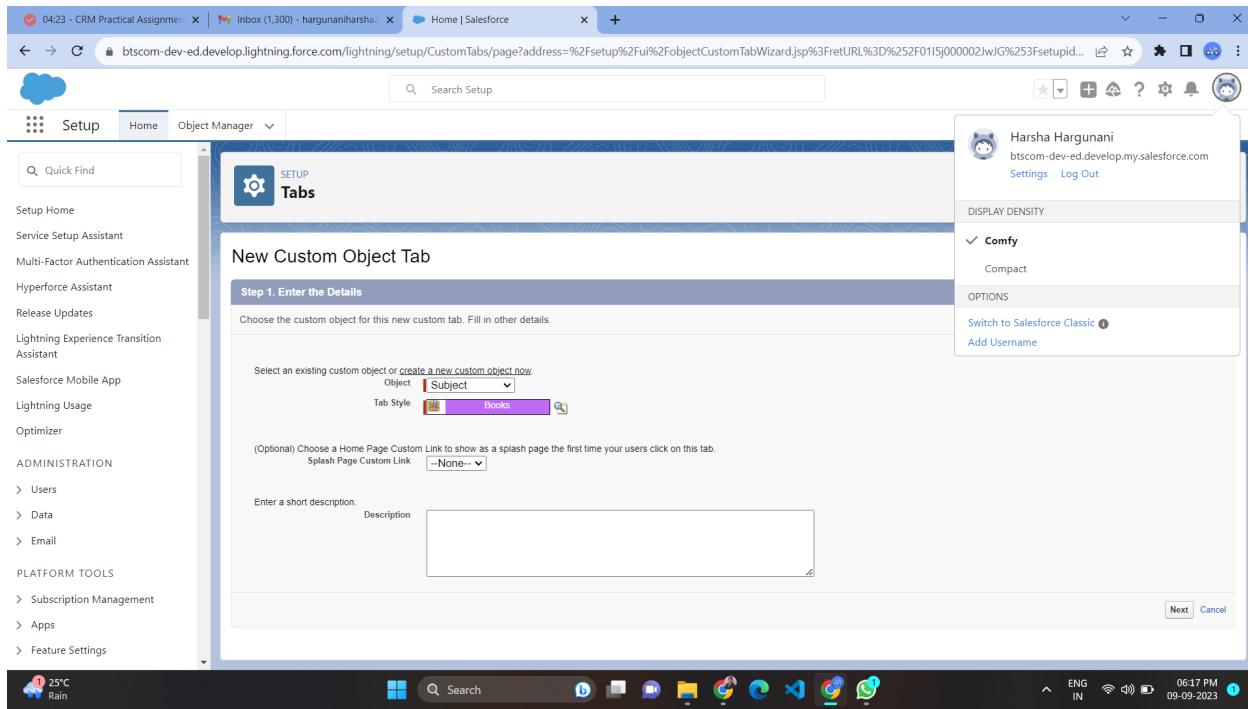
Content Name: None

Enter Record Name / Label and Format

25°C Rain

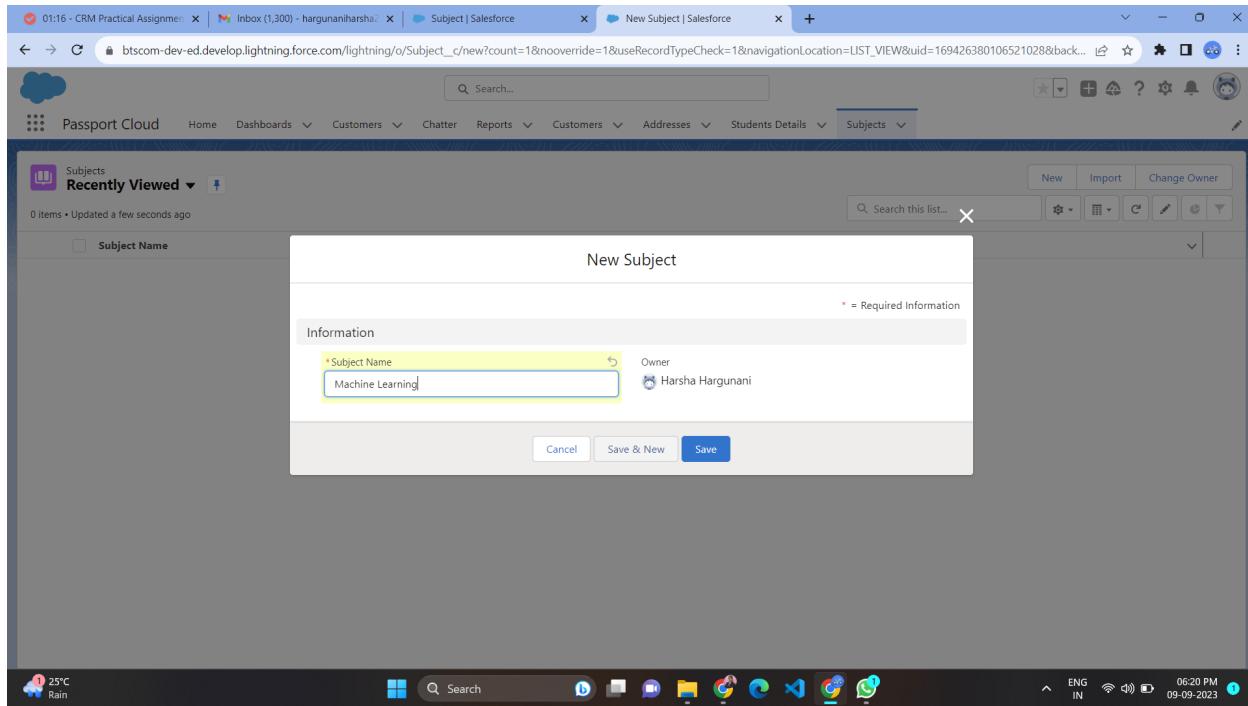
ENG IN 06:16 PM 09-09-2023

8. Select an icon for the Subject Tab.



9. Before creating a Master-Detail relationship, let's verify if the relationship can be established while there are pre-existing records on the Detail side.

- Create 1 or 2 records under Subject Tab.



00:57 - CRM Practical Assignment | ↗ Inbox (1,300) - hargunaniharsha | ↗ Subject | Salesforce | ↗ Recently Viewed | Subjects | Sale | +

Passport Cloud Home Dashboards Customers Chatter Reports Customers Addresses Students Details Subjects

Subjects Recently Viewed

2 items • Updated a few seconds ago

Subject Name

1 Operating System

2 Machine Learning

Search this list...

Harsha Hargunani btscom-dev-ed.develop.my.salesforce.com Settings Log Out

DISPLAY DENSITY

✓ Comfy Compact

OPTIONS

Switch to Salesforce Classic Add Username

25°C Rain Search ENG IN 06:20 PM 09-09-2023

b) Attempt to create a new field of master-detail type on "Subject".

00:30 - CRM Practical Assignment | ↗ Inbox (1,300) - hargunaniharsha | ↗ Subject | Salesforce | ↗ Recently Viewed | Subjects | Sale | +

Setup Home Object Manager

SETUP > OBJECT MANAGER Subject

New Custom Field

Step 1. Choose the field type

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

Step 1

Next Cancel

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.

External Lookup Relationship Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

Help for this Page

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 List View Button Layout Restriction Rules Scoping Rules

25°C Rain Search ENG IN 06:21 PM 09-09-2023

00:11 - CRM Practical Assignment | ↗ Inbox (1,300) - hargunaniharsha | Subject | Salesforce | Recently Viewed | Subjects | Sales | +

btscom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I5j000002JwJG/FieldsAndRelationships/new

Setup Home Object Manager

SETUP > OBJECT MANAGER Subject

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 List View Button Layout Restriction Rules Scoping Rules

Subject New Relationship Step 2 of 6

Step 2. Choose the related object

Select the other object to which this object is related.

Related To: Student Details

Help for this Page ?

Previous Next Cancel

25°C Rain ENG IN 06:21 PM 09-09-2023

05:00 - Time for a break! | ↗ Inbox (1,300) - hargunaniharsha | Subject | Salesforce | Recently Viewed | Subjects | Sales | +

btscom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I5j000002JwJG/FieldsAndRelationships/new

Setup Home Object Manager

SETUP > OBJECT MANAGER Subject

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 List View Button Layout Restriction Rules Scoping Rules

Subject New Relationship Step 3 of 6

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

Field Label: Student Details

Field Name: Student_Details

Description:

Help Text:

Child Relationship Name: Subjects

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

Help for this Page ?

Previous Next Cancel

25°C Rain ENG IN 06:22 PM 09-09-2023

The screenshot shows the Salesforce Setup interface for the 'Subject' object. The left sidebar lists various setup categories like Page Layouts, Lightning Record Pages, and Fields & Relationships. The main content area displays an error message: 'Cannot Create Master-Detail Relationship'. It states: 'You cannot create a new Master-Detail relationship on an existing custom object if records already exist. You must first create a Lookup relationship, populate the lookup field with data in all records, and then change the relationship type to Master-Detail.' A link is provided to return to the previous page.

- c) Bravo! Hence, we can conclude that “A new Master-Detail relationship cannot be created on a custom object if records already exist on the Detail side”.

10. Delete the two records and build a Master-Detail Relationship.

The screenshot shows the Salesforce Setup interface for the 'Subject' object, specifically the 'Fields & Relationships' section. The left sidebar lists various setup categories. The main content area displays a table of fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROL
Created By	CreatedById	Lookup(User)	
Last Modified By	LastModifiedById	Lookup(User)	
Student Details	Student_Details__c	Master-Detail(Student Details)	▼
Subject Name	Name	Text(80)	▼

A context menu is open on the right side of the screen, showing options for 'DISPLAY DENSITY' (set to 'Comfy'), 'OPTIONS' (with 'Switch to Salesforce Classic' and 'Add Username' listed), and user information for 'Harsha Hargunani'.

11. "Master is mandatory while creating Details (Child) records."

The screenshot shows the 'New Subject' form in the Salesforce Lightning interface. The 'Subject Name' field contains 'Computer Networks'. The 'Student Details' search bar is empty and has a red border, with the error message 'Complete this field.' displayed below it. The bottom of the form includes 'Cancel', 'Save & New', and 'Save' buttons.

12. "When we delete a Master Record, then all the related details records get deleted. This is called "Delete Cascade."

- Create 2 student records and 3 subject records associated with them.

The screenshot shows the 'Student Details' page for StudentID 101. The 'Details' tab is active, displaying fields such as First Name (Taehyung), Last Name (Kim), Branch (IT), DOB (30/12/1995), Student Full Name (Kim Taehyung), PAN Number, Email ID, and Phone No. The sidebar on the right shows the user profile of Harsha Hargunani and a 'DISPLAY DENSITY' dropdown set to 'Comfy'. The 'Upcoming & Overdue' section indicates 'No activities to show.'

25:00 - CRM Practical Assignment | Inbox (1,301) - hargunaniharsha | Student Details | Salesforce | New Subject | Salesforce

btscom-dev-ed.develop.lightning.force.com/lightning/o/Subject__c/new?count=1&nooverride=1&useRecordTypeCheck=1&navigationLocation=LIST_VIEW&uid=169427020543568940...

Search...

Passport Cloud Home Dashboards Customers Chatter Reports Customers Addresses Students Details Subjects

Subjects Recently Viewed

0 items • Updated a few seconds ago

New Subject

* = Required Information

Information

* Subject Name: Computer Networks

* Student Details: Search Students Details...

Recent Students Details:

- 101 Taehyung Kim
- 102 Seokjin Kim
- + New Student Details

Save & New Save

26°C Rain ENG IN 08:06 PM 09-09-2023

25:00 - CRM Practical Assignment | Inbox (1,301) - hargunaniharsha | Student Details | Salesforce | Recently Viewed | Students Details

btscom-dev-ed.develop.lightning.force.com/lightning/o/Student_Details_c/list?filterName=Recent

Search...

Passport Cloud Home Dashboards Customers Chatter Reports Customers Addresses Students Details Subjects

Students Details Recently Viewed

2 items • Updated a few seconds ago

Search this list...

StudentID	Full Name
1 101	Taehyung Kim
2 102	Seokjin Kim

javascript:void(0);

26°C Rain ENG IN

Recently Viewed

3 items • Updated a few seconds ago

	Subject Name
1	Cloud Computing
2	Full Stack Development
3	Computer Networks

Search this list...

DISPLAY DENSITY

✓ Comfy

Compact

OPTIONS

Switch to Salesforce Classic

Add Username

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26°C Rain

Search

08:08 PM 09-09-2023

Students:

101 - Taehyung
102 - Seokjin

Subjects:

Computer Networks - 101
Full Stack Development - 101
Cloud Computing - 102

b) Delete Student record "101".

Students Details

Recently Viewed

	StudentID	Full Name
1	101	Taehyung Kim
2	102	Seokjin Kim

2 items • Updated a few seconds ago

Search this list...

New Import Change Owner

Edit Delete Change Owner

javascript:void(0);

26°C Rain

ENG IN 08:09 PM 09-09-2023

c) It is observed that the associated child records of CN and FSD automatically get deleted.

Subjects

Recently Viewed

	Subject Name
1	Cloud Computing

1 item • Updated a few seconds ago

Search this list...

New Import

Edit Delete Change Owner

26°C Rain

ENG IN 08:09 PM 09-09-2023

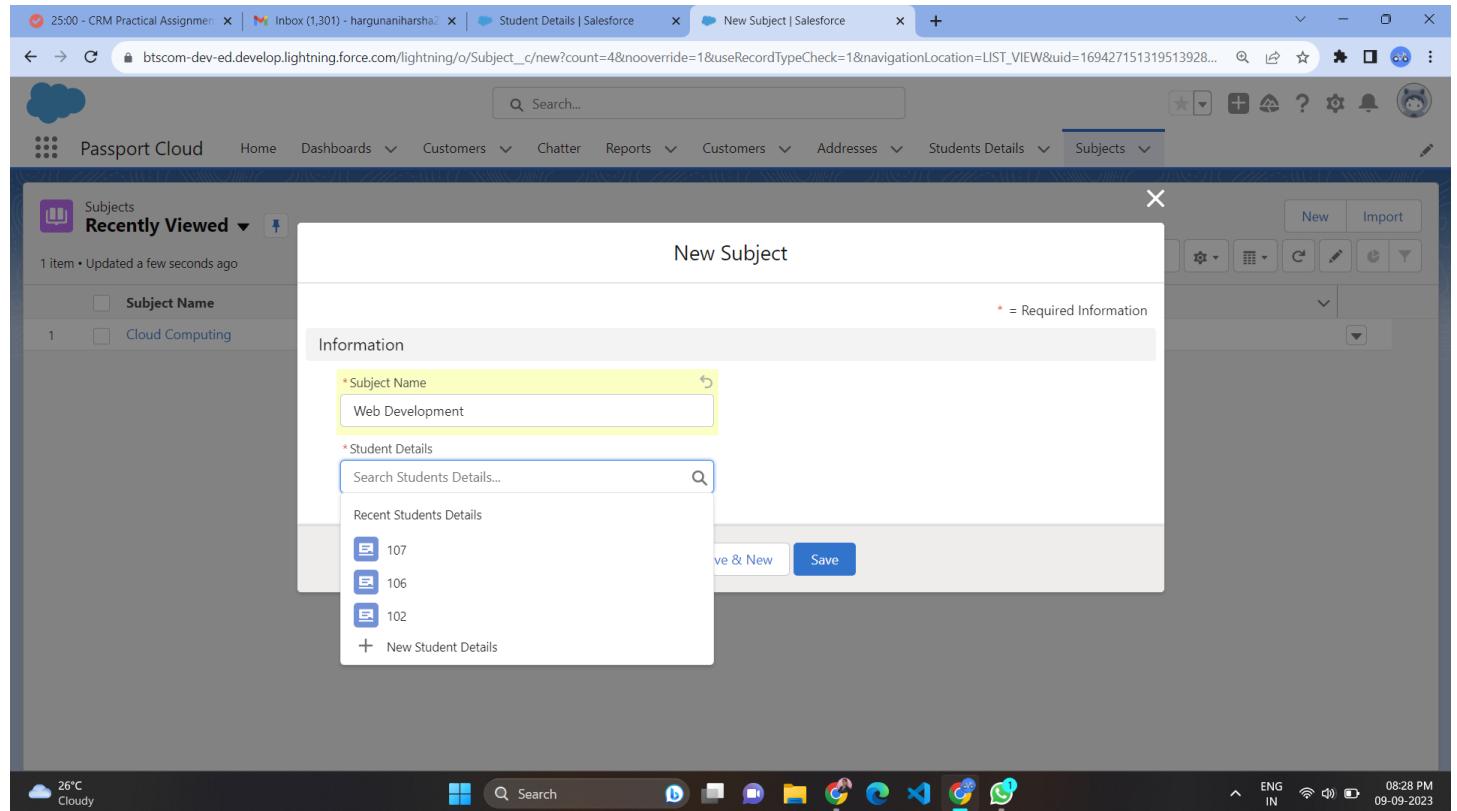
Hence verified.

Q2. Create a Master-Details Relationship between these two Objects.

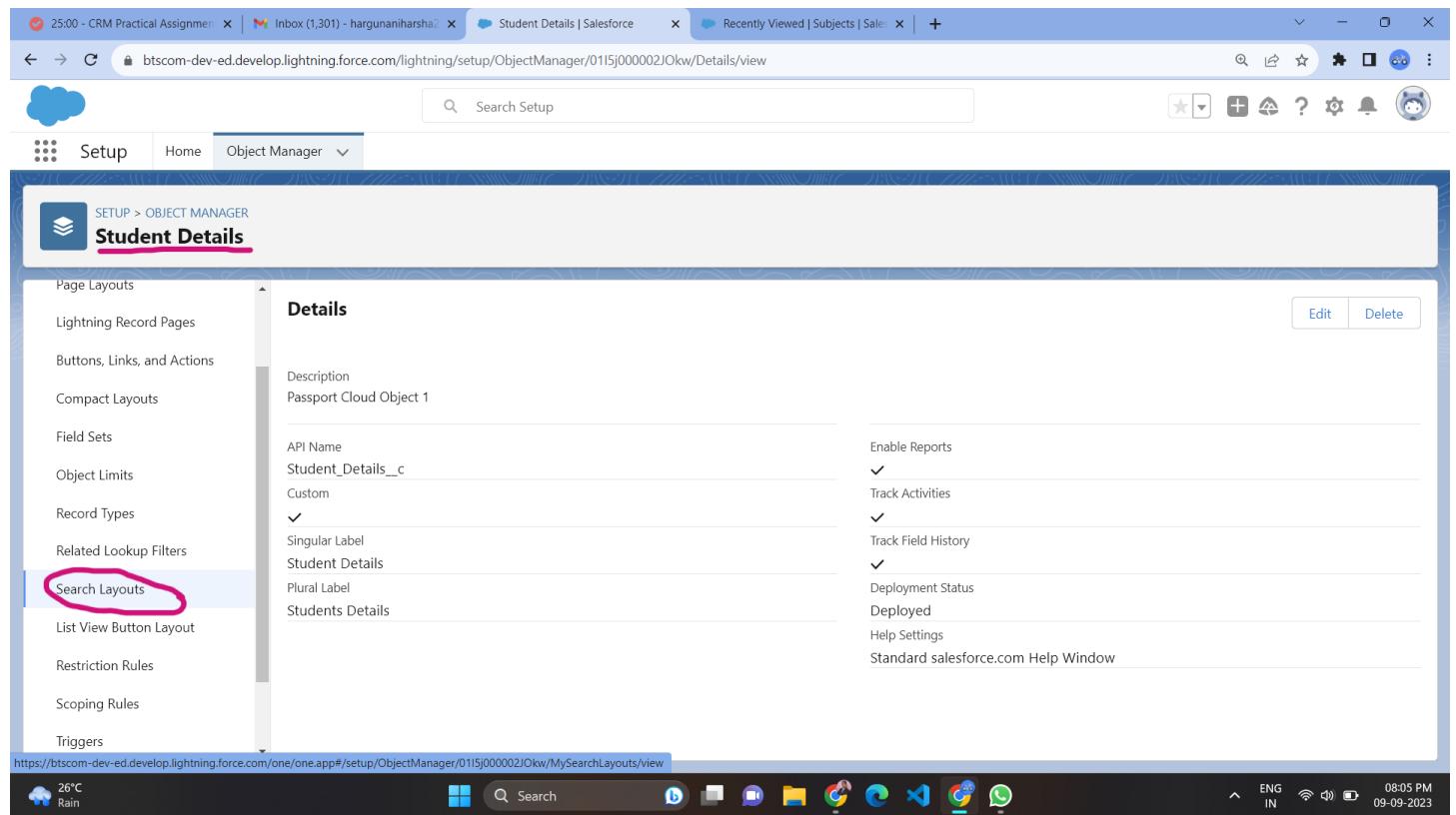
Ans. Done in the above steps.

Q3. Show "Student Name" in the Lookup dialog.

Ans. Since "Student ID" is the default field that appears in the Lookup dialog, it isn't convenient to point out which student is it just by looking through their IDs. So we'll add the "Full Name" field as well in the lookup dialog.



1. Navigate to Master/Parent Object - Student Detail here. Select "Search Layout".



2. Click "Edit" in front of the "Default Layout"

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected for the 'Student Details' object. On the left, a sidebar lists various setup categories. The main area displays a table titled 'Search Layouts' with 43 items. The first item in the list is 'Default Layout'. To the right of the table, there is a column labeled 'COLUMNS DISPLAYED' with an 'Edit' button. This 'Edit' button is highlighted with a pink circle.

3. Select "Full Name" among the fields and then "left arrow" to insert it into the "search" column.

The screenshot shows the 'Edit Search Layout' page for the 'Student Details' object. The left sidebar includes a 'Search Layouts' section. The main content area is titled 'Edit Search Layout' and shows 'Student Details Search Results'. It provides instructions for selecting fields for search results. Two columns are present: 'Available Fields' (containing fields like Record ID, Branch, DOB, Email ID, First Name, Last Name, PAN Number, Phone No, Student Full Name, and Owner Alias) and 'Selected Fields' (containing 'StudentID'). A red arrow points from the 'Available Fields' list to the 'Selected Fields' list, indicating the action of moving the 'Full Name' field. A pink circle highlights the 'Add' button (represented by a right-pointing arrow) used to move the field.

4. The result should look like this. Click "Save".

The screenshot shows the Salesforce Setup interface for the 'Student Details' object. On the left, a sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, etc. The main area shows 'Available Fields' (Record ID, Branch, DOB, Email ID, First Name, Last Name, PAN Number, Phone No, Student Full Name, Owner Alias, Owner First Name) and 'Selected Fields' (StudentID, Full Name). Below these are sections for Standard Buttons (none) and Custom Buttons (link to create). At the bottom right is a 'Save' button, which is circled in red.

5. Now we can see the Student Full Name appearing below their IDs in the lookup dialog.

The screenshot shows the Salesforce Subjects page with a 'New Subject' dialog open. The dialog has an 'Information' section with a required field 'Subject Name' containing 'Computer Networks'. Below it is a 'Student Details' section with a search bar 'Search Students Details...' and a dropdown showing recent students: '101 Taehyung Kim' and '102 Seokjin Kim'. At the bottom right of the dialog is a 'Save' button, which is circled in red.

Q4. Can we convert Lookup Relationship INTO Master-Details Relationship?

Ans. Yes, but first we must associate all the child records with at least one parent.

Q5. Can we convert Master-Details Relationship INTO Lookup Relationship?

Ans. Yes, but there should not be any Rollup Summary Field that exists on the Master Object. If it does, then delete it.

Q6. How to change Master in Details Record?

Ans. Yes, the Master selected can be adjusted if the “Allow reparenting” box is checked while building the relationship.

“Allow reparenting Child records can be reparented to other parent records after they are created”

Sharing Setting	Select the minimum access level required on the Master record to create, edit, or delete related Detail records: <input type="radio"/> Read Only: Allows users with at least Read access to the Master record to create, edit, or delete related Detail records. <input checked="" type="radio"/> Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.
Allow reparenting	<input type="checkbox"/> Child records can be reparented to other parent records after they are created
Auto add to custom report type	<input checked="" type="checkbox"/> Add this field to existing custom report types that contain this entity i

Q7. How to make Parent field compulsory in Lookup Relationship?

Ans.

Lookup Options		
Related To	Applicant	Child Relations
Related List Label	test	
Required	<input checked="" type="checkbox"/> Always require a value in this field in order to save a record	
What to do if the lookup record is deleted?	<input type="radio"/> Clear the value of this field. You can't choose this option if you m; <input checked="" type="radio"/> Don't allow deletion of the lookup record that's part of a lookup re	
Lookup Filter		

Q8. Create Two Objects “Customer” and “Payment”. Create Some Fields. Create some Records in Payment Objects. Create a Master-Details Relationship between them.

Ans. 1. Create Customer and Payment objects.

25°C Cloudy

ENG IN 09:16 PM 09-09-2023

Customer

Fields & Relationships

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING F
Created By	CreatedById	Lookup(User)	
Customer Name	Name	Text(80)	
Email Address	Email_Address__c	Email	
Last Modified By	LastModifiedById	Lookup(User)	
Owner	OwnerId	Lookup(User,Group)	✓

Details
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Related Lookup Filters
Search Layouts
List View Button Layout

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DISPLAY DENSITY
✓ Comfy
Compact
OPTIONS
Switch to Salesforce Classic ⓘ
Add Username

23°C Light rain

ENG IN 10:07 PM 09-09-2023

Payment

Fields & Relationships

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING F
Amount paid	Amount_paid__c	Currency(5, 0)	
Created By	CreatedById	Lookup(User)	
Customer Name	Customer_Name__c	Master-Detail(Customer)	✓
Last Modified By	LastModifiedById	Lookup(User)	
Payment ID	Name	Auto Number	✓

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters

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DISPLAY DENSITY
✓ Comfy
Compact
OPTIONS
Switch to Salesforce Classic ⓘ
Add Username

2. Apply Master-Detail relationship on "Customer Name".
3. Add some records to both the objects.

25:00 - CRM Practical Assignment | [Inbox \(1,301\) - hargunaniharsha...](#) | [Recently Viewed | Customers | Sa...](#) | [Twice Members Real Names: Wh...](#) | +

btsc.com-dev-ed.develop.lightning.force.com/lightning/o/Customer__c/list?filterName=Recent

Search... ★ + ? ⚙ 🔍

Passport Cloud Home Dashboards Customers Chatter Reports Addresses Students Data

Customers **Recently Viewed** + ↴

5 items • Updated a few seconds ago

	<input type="checkbox"/> Customer Name
1	<input type="checkbox"/> Park Jihyo
2	<input type="checkbox"/> Kim Jisoo
3	<input type="checkbox"/> Kim Namjoon
4	<input type="checkbox"/> Kim Taehyung
5	<input type="checkbox"/> Jeon Jungkook

Search this list... ✖

Harsha Hargunani
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[Settings](#) [Log Out](#)

DISPLAY DENSITY

✓ **Comfy**
Compact

OPTIONS

[Switch to Salesforce Classic](#) i
[Add Username](#)

23°C Rain ENG IN 🔍 09:40 PM 09-09-2023

25:00 - CRM Practical Assignment | [Inbox \(1,301\) - hargunaniharsha...](#) | [Recently Viewed | Payments | Sa...](#) | +

btsc.com-dev-ed.develop.lightning.force.com/lightning/o/Payment__c/list?filterName=Recent

Search... ★ + ? ⚙ 🔍

Passport Cloud Home Dashboards Customers Chatter Reports Addresses Students Data

Payments **Recently Viewed** + ↴

8 items • Updated a few seconds ago

	Payment ID
1	0008
2	0007
3	0006
4	0005
5	0004
6	0003
7	0002
8	0001

Search this list... ✖

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DISPLAY DENSITY

✓ **Comfy**
Compact

OPTIONS

[Switch to Salesforce Classic](#) i
[Add Username](#)

23°C Rain ENG IN 🔍 09:40 PM 09-09-2023

Q9. Create Rollup Summary Field.

Ans. 1. Create a new field on the Master/Parent side. Click "New".

The screenshot shows the Salesforce Object Manager for the 'Customer' object. On the left, there's a sidebar with links like Details, Fields & Relationships, Page Layouts, etc. The main area is titled 'Fields & Relationships' and lists several fields: Created By, Customer Name, Email Address, Last Modified By, and Owner. A 'New' button is highlighted with a red circle. On the right, a user profile for Harsha Hargunani is shown with options for Display Density (set to Comfy) and Options (Switch to Salesforce Classic). The system status bar at the bottom indicates it's 23°C Rain, ENG IN, and the date is 09-09-2023.

2. Select field types as "Roll-up Summary".

The screenshot shows the 'New' page for creating a custom field. The 'Data Type' section is open, showing various options: None Selected (selected), Auto Number, Formula, Roll-Up Summary (selected), Lookup Relationship, and Master-Detail Relationship. The 'Roll-Up Summary' option is described as a 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. The system status bar at the bottom indicates it's 23°C Rain, ENG IN, and the date is 09-09-2023.

3. Enter field label.

The screenshot shows the Salesforce Setup interface for the 'Customer' object. On the left, a sidebar lists 'Fields & Relationships' under 'Customer'. The main area displays the 'Edit Customer Custom Field' page for a field named 'Total amount paid'. The 'Field Information' section includes fields for 'Field Label' (set to 'Total amount paid'), 'Field Name' (set to 'Total_amount_paid'), 'Description' (empty), 'Help Text' (empty), 'Data Owner' (set to 'User'), 'Field Usage' (set to '--None--'), and 'Data Sensitivity Level' (set to '--None--'). A right-hand sidebar shows user information for Harsha Hargunani and settings for 'DISPLAY DENSITY' (set to 'Comfy') and 'OPTIONS'.

4. Select aggregate type, here "SUM" to display total amount paid by all the customers.

The screenshot shows the 'Roll-Up Summary Options' screen for the 'Customer' object. It includes sections for 'Data Type' (set to 'Roll-Up Summary'), 'Calculation Options' (with 'Automatic calculation (Recommended)' selected), 'Select Object to Summarize' (Master Object: 'Customer', Summarized Object: 'Payments'), 'Select Roll-Up Type' (with 'SUM' selected), and 'Filter Criteria' (checkbox 'All records should be included in the calculation' checked). The right-hand sidebar shows user information for Harsha Hargunani and settings for 'DISPLAY DENSITY' (set to 'Comfy') and 'OPTIONS'.

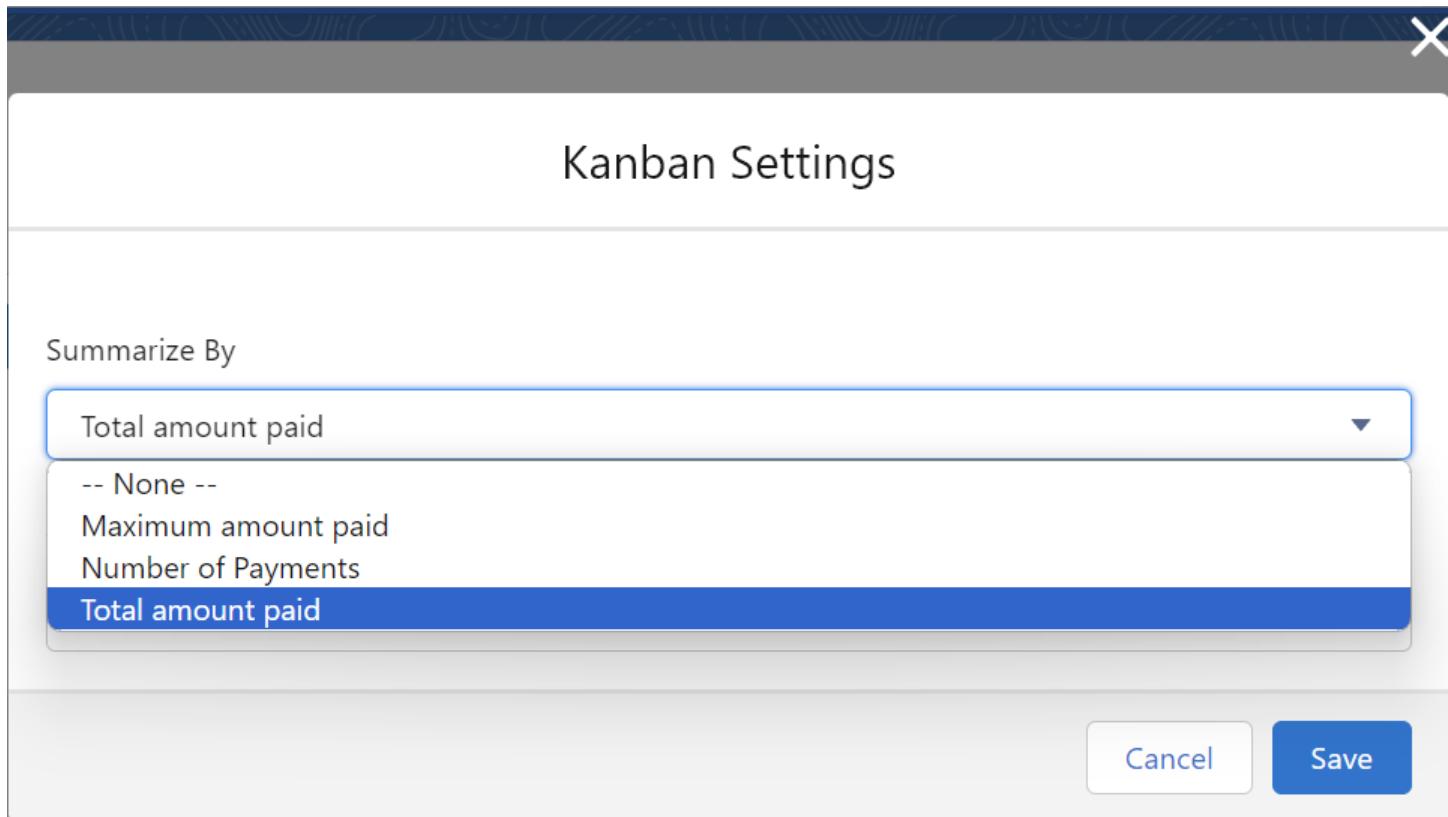
5. Similarly create for “COUNT” - Number of payments and “MAX” - Maximum amount paid.

The screenshot shows the Salesforce Object Manager interface for the 'Customer' object. On the left, a sidebar lists various configuration options like Page Layouts, Lightning Record Pages, Buttons, etc. The main area is titled 'Fields & Relationships' and displays eight items sorted by field label. The fields listed are: Customer Name (Text(80)), Email Address (Email), Last Modified By (Lookup(User)), Maximum amount paid (Maximum_amount_paid__c, Roll-Up Summary (MAX Payment)), Number of Payments (Number_of_Payments__c, Roll-Up Summary (COUNT Payment)), Owner (OwnerId, Lookup(User,Group)), and Total amount paid (Total_amount_paid__c, Roll-Up Summary (SUM Payment)). A search bar at the top right says 'Search Setup'. A user profile for Harsha Hargunani is visible on the right, along with display density settings ('Comfy' selected) and a link to 'Switch to Salesforce Classic'.

6. Navigate to “App” and change display settings to “Kanban” view.

The screenshot shows a custom application interface titled 'Recently Viewed' under the 'Customers' tab. It lists five recently viewed customers: Park Jihyo, Kim Jisoo, Kim Namjoon, Kim Taehyung, and Jeon Jungkook. Each customer entry includes a checkbox and a link to their profile. To the right of the list is a 'Display as' dropdown menu. The 'Kanban' option is highlighted with a pink circle. The application also features a header with navigation links like Home, Dashboards, Customers, Chatter, Reports, Addresses, Students Details, and a More dropdown. A toolbar with various icons is located at the top right, and a system tray at the bottom shows weather information and system status.

7. A dialog box will appear. Select the summary you want to see.

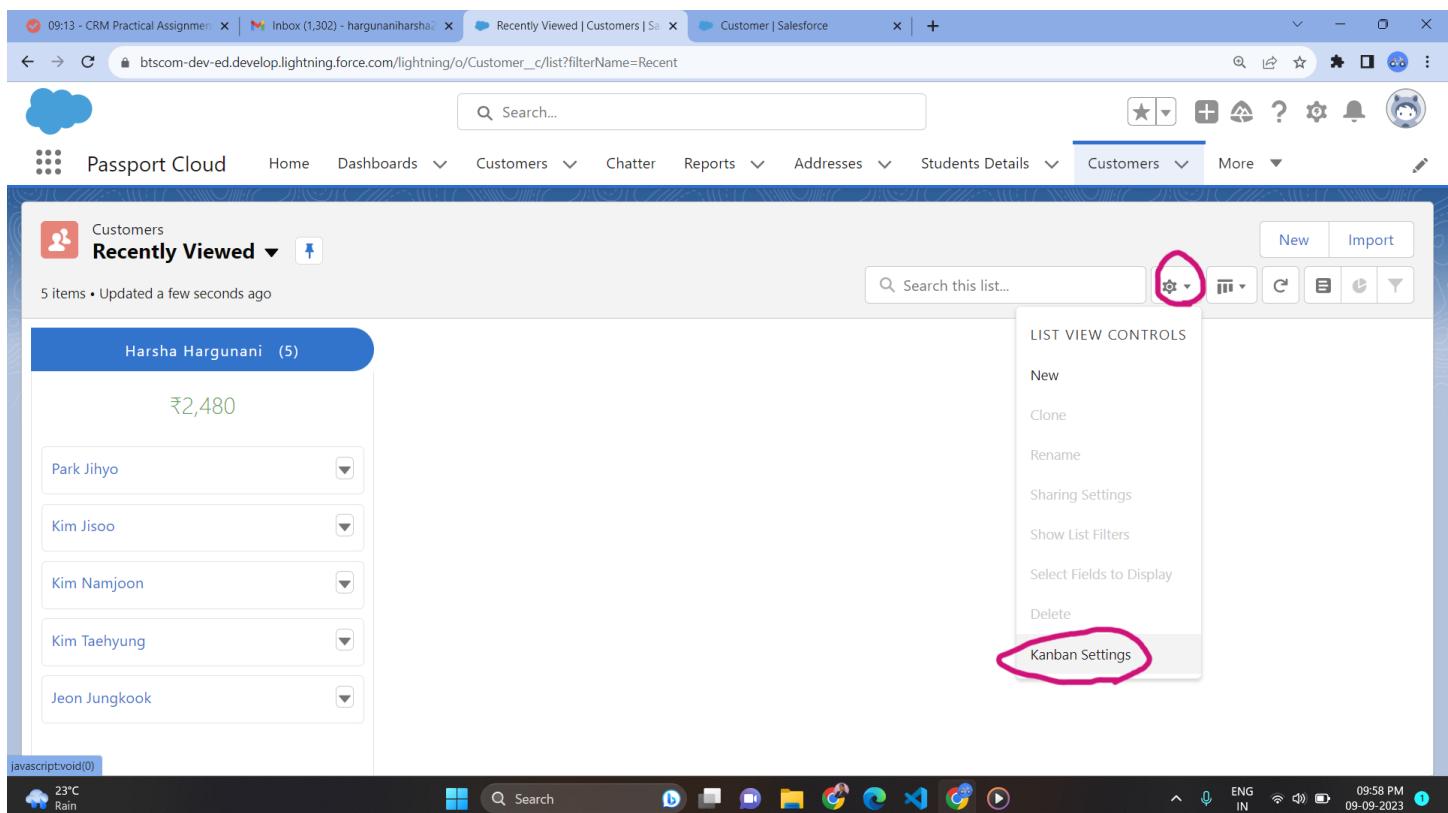


8. Hence we can see, Total amount paid of all the customers is Rs.2480

The screenshot shows the Salesforce Lightning interface. At the top, there are several tabs: '09:19 - CRM Practical Assignment' (with a red exclamation mark), 'Inbox (1,302) - hargunaniharsha', 'Recently Viewed | Customers | S', and 'Customer | Salesforce'. The main content area is titled 'Recently Viewed' under 'Customers'. It lists five items: 'Harsha Hargunani (5)', '₹2,480', 'Park Jihyo', 'Kim Jisoo', 'Kim Namjoon', 'Kim Taehyung', and 'Jeon Jungkook'. A search bar at the top right says 'Search...'. On the far right, a user profile for 'Harsha Hargunani' is shown, along with options to switch to 'Salesforce Classic', add a username, and change display density from 'Comfy' to 'Compact'. The bottom of the screen shows the Windows taskbar with various pinned icons.

Payment ID	Customer Name	Amount Paid
0001	Park Jihyo	100
0002	Kim Namjoon	250
0003	Jeon Jungkook	500
0004	Park Jihyo	180
0005	Kim Taehyung	600
0006	Kim Namjoon	225
0007	Kim Jisoo	345
0008	Park Jihyo	280
Total	All	2480

9. Clicking on settings icon | Kanban settings we can change the rollup summary field.



The screenshot shows a Salesforce Lightning page for 'Customers'. In the top navigation bar, there are tabs for Home, Dashboards, Customers, Chatter, Reports, Addresses, Students Details, and Customers. A search bar is also present. On the left, a sidebar lists 'Recently Viewed' items, including 'Harsha Hargunani (5)' and a total amount of ₹2,480. Below this, there are dropdown menus for selecting customers: Park Jihyo, Kim Jisoo, Kim Namjoon, Kim Taehyung, and Jeon Jungkook. A context menu is open on the right, with the 'Kanban Settings' option circled in red. The menu includes options like New, Clone, Rename, Sharing Settings, Show List Filters, Select Fields to Display, Delete, and Kanban Settings.

A screenshot of a CRM application interface. At the top, there are several tabs: 'CRM Practical Assignment' (active), 'Inbox (1,302)', 'Recently Viewed | Customers', 'Customer | Salesforce', and others. The main navigation bar includes 'Passport Cloud', 'Home', 'Dashboards', 'Customers', 'Chatter', 'Reports', 'Addresses', 'Students Details', 'Customers', and 'More'. A search bar at the top right contains the placeholder 'Search...'. Below the navigation, a sidebar titled 'Recently Viewed' shows five items: 'Harsha Hargunani (5)' with a total amount of ₹2,480, and four other names: Park Jihyo, Kim Jisoo, Kim Namjoon, and Kim Taehyung. A modal window titled 'Kanban Settings' is open, showing a dropdown menu for 'Summarize By' with options: 'Total amount paid', '-- None --', 'Maximum amount paid', 'Number of Payments' (which is selected and highlighted in blue), and 'Total amount paid' again. Buttons for 'Cancel' and 'Save' are at the bottom of the modal. The system status bar at the bottom shows weather (23°C Light rain), a search bar, and various system icons.

10. Summarize By - Maximum amount paid

A screenshot of the same CRM application after applying the 'Maximum amount paid' summarization. The main list now shows a single item for 'Harsha Hargunani (5)' with a total amount of ₹1,975. The other names from the previous list are no longer visible. The 'Kanban Settings' dialog is closed. The system status bar at the bottom shows weather (23°C Rain), a search bar, and various system icons.

Sr. no.	Customer Name	Maximum amount paid
1	Jeon Jungkook	500
2	Kim Jisoo	345
3	Kim Namjoon	475
4	Kim Taehyung	600
5	Park Jihyo	560
Total	All	1975

11. Summarize By - Number of Payments

The screenshot shows a Salesforce Lightning interface with the following details:

- Header:** CRM Practical Assignment, Inbox (1,302), Recently Viewed | Customers, Customer | Salesforce.
- Breadcrumbs:** btocom-dev-ed.lightning.force.com/lightning/o/Customer__c/list?filterName=Recent
- Search Bar:** Search...
- Toolbar:** Home, Dashboards, Customers, Chatter, Reports, Addresses, Students Details, Customers, More.
- Section Header:** Customers, Recently Viewed (5).
- List:** Harsha Hargunani (5) with 8 items. The items listed are Park Jihyo, Kim Jisoo, Kim Namjoon, Kim Taehyung, and Jeon Jungkook.
- Bottom Bar:** Weather (23°C Rain), Search, and various system icons.

Since there are 8 records in the payment object and none of the amount is null.

12. These Rollup Summary can also be seen for individual customer records.

This screenshot shows the Salesforce Lightning interface for a customer record. The top navigation bar includes links for Home, Dashboards, Customers, Chatter, Reports, Addresses, and Students. The main content area displays the details for a customer named Park Jihyo, including their name, email address, total amount paid (₹560), number of payments (3), and maximum amount paid (₹280). The record was created by Harsha Hargunani on 09/09/2023 at 9:38 pm and last modified by her at the same time. The owner of the record is also Harsha Hargunani. On the right side, there is a sidebar with user settings, display density options (set to Comfy), and an 'Upcoming & Overdue' section which is currently empty. The bottom of the screen shows a Windows taskbar with various icons and system status.

This screenshot shows the Salesforce Lightning interface for a customer record. The top navigation bar includes links for Home, Dashboards, Customers, Chatter, Reports, Addresses, and Students. The main content area displays the details for a customer named Kim Namjoon, including their name, email address (namjoon@bts.com), total amount paid (₹475), number of payments (2), and maximum amount paid (₹250). The record was created by Harsha Hargunani on 09/09/2023 at 9:36 pm and last modified by her at the same time. The owner of the record is also Harsha Hargunani. On the right side, there is a sidebar with user settings, display density options (set to Comfy), and an 'Upcoming & Overdue' section which is currently empty. The bottom of the screen shows a Windows taskbar with various icons and system status.

Q10. Now try to convert this relationship into Lookup. And check what happens?

Ans. Step1: To switch relationship type, go to child object and “Edit” the master-detail field.

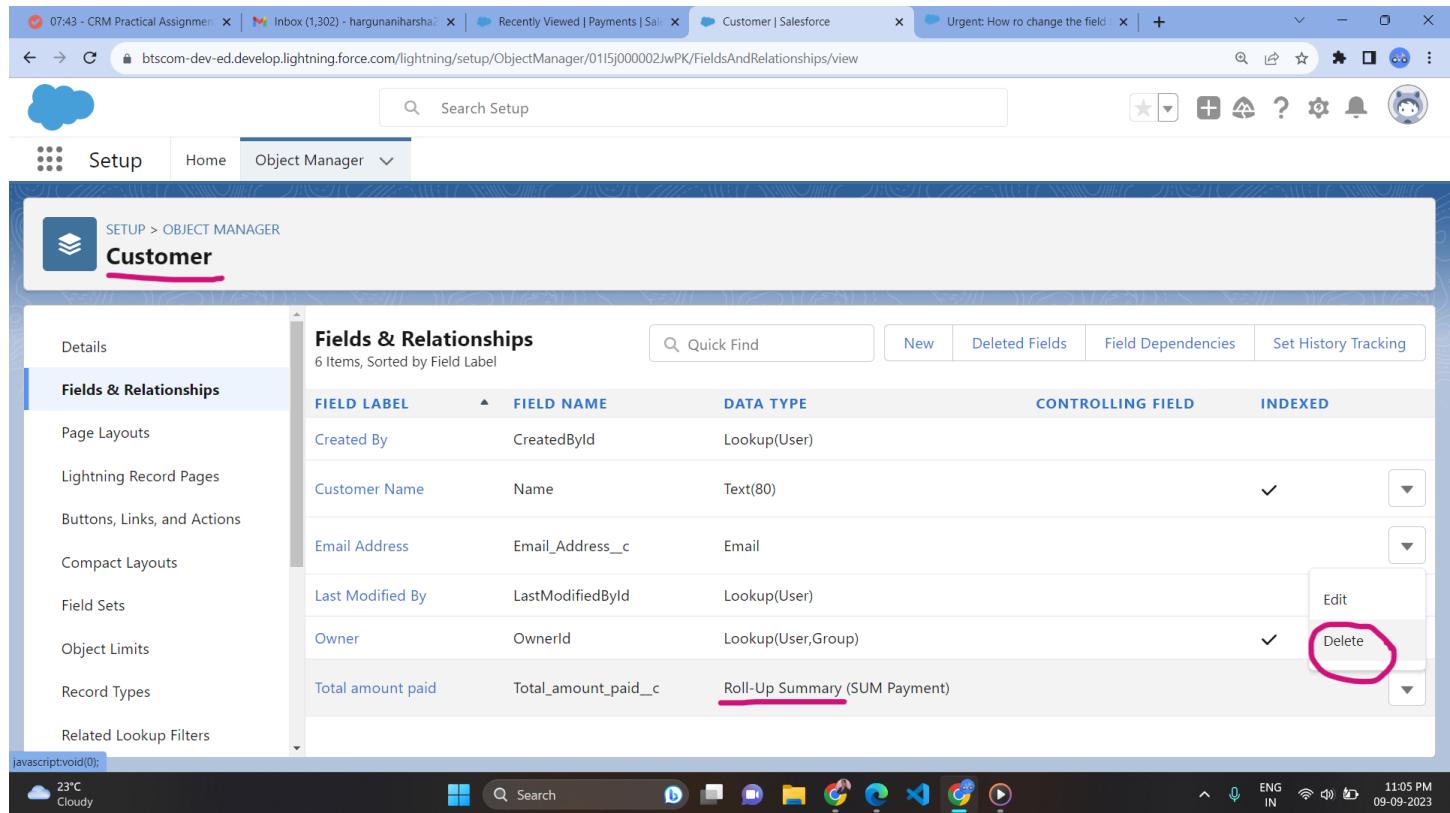
The screenshot shows the Salesforce Object Manager interface. On the left, there's a sidebar with links like Page Layouts, Lightning Record Pages, Buttons, etc. The main area is titled "Fields & Relationships" and lists fields for the "Payment" object. One field, "Customer Name", is highlighted with a pink box and has its "Data Type" set to "Master-Detail(Customer)". To the right of the table, there are "Edit" and "Delete" buttons, both of which are circled in red.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount paid	Amount_paid_c	Currency(5, 0)		
Created By	CreatedById	Lookup(User)		
Customer Name	Customer_Name__c	Master-Detail(Customer)		
Last Modified By	LastModifiedById	Lookup(User)		
Payment ID	Name	Auto Number		

The screenshot shows the "Edit Payment Custom Field Customer Name" page. In the "Field Information" section, the "Data Type" is explicitly set to "Master-Detail". A question mark icon is placed above the "Field Information" section, likely indicating a note or a problem with this configuration.

Step2: However, it was observed that the option to change the field type was not available.. This happened because we still have rollup summary fields present on the parent side.

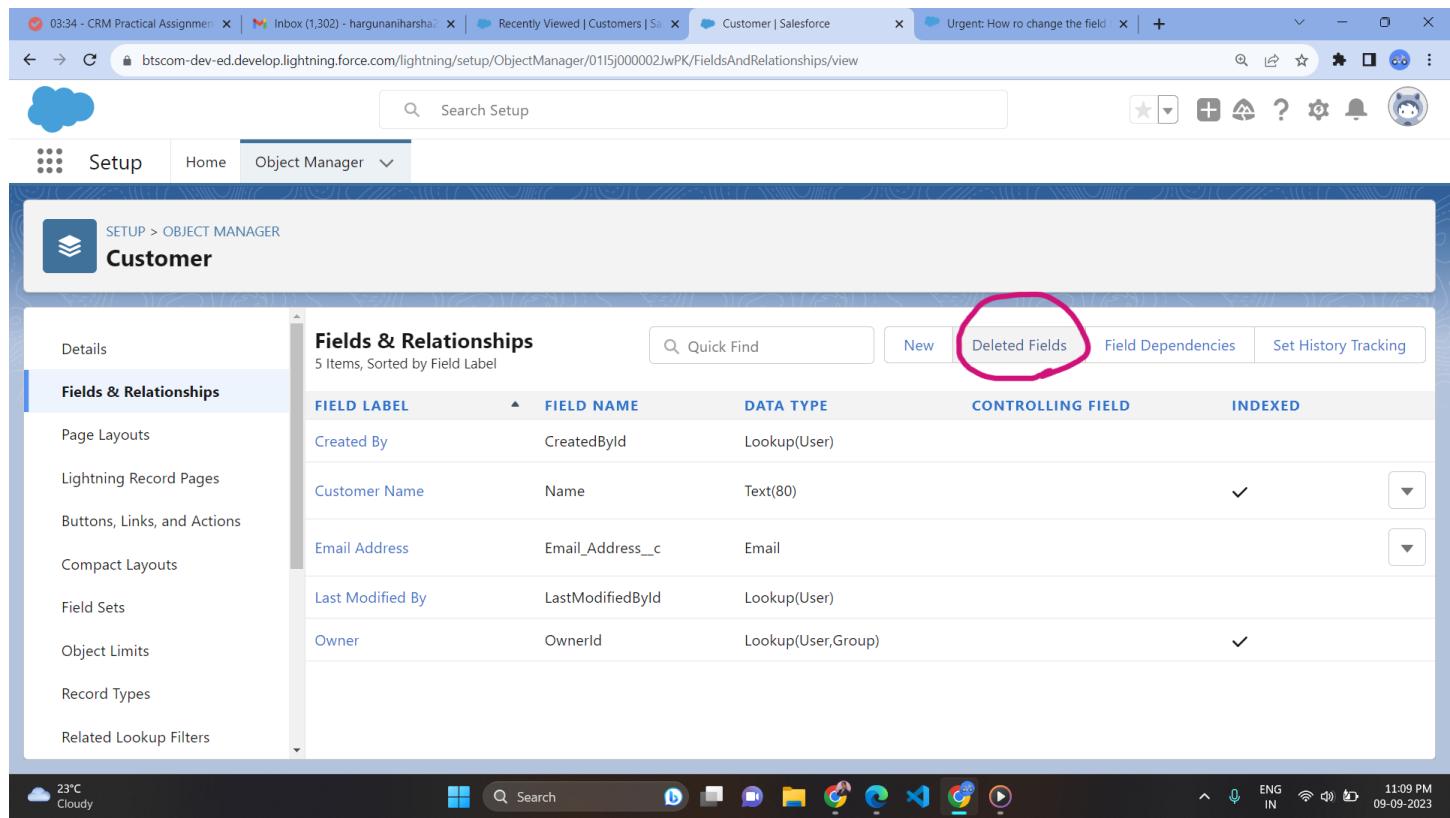
Step3: Navigate to the “Customer” object and delete all the rollup summary fields.



The screenshot shows the Salesforce Object Manager for the 'Customer' object. The 'Fields & Relationships' section lists six items. The sixth item, 'Total amount paid', has its 'Data Type' set to 'Roll-Up Summary (SUM Payment)'. To the right of this row, there is an 'Edit' button and a 'Delete' button, which is circled in pink.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Customer Name	Name	Text(80)		✓
Email Address	Email_Address__c	Email		▼
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)	✓	
Total amount paid	Total_amount_paid__c	Roll-Up Summary (SUM Payment)		

Step4: However, this isn't sufficient to change the relationship/ field type yet. Click on “Deleted Fields” and erase each of the deleted rollup summary fields.



The screenshot shows the 'Deleted Fields' tab in the 'Fields & Relationships' section of the Customer object. This tab is highlighted with a pink circle. It lists five items, including the previously deleted 'Total amount paid' field.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Customer Name	Name	Text(80)		✓
Email Address	Email_Address__c	Email		▼
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)	✓	
Total amount paid	Total_amount_paid__c	Roll-Up Summary (SUM Payment)		

Salesforce starts to hard delete these fields after 15 days. The hard-delete process permanently removes all metadata and system data for the field. Erase skips the 15-day grace period, and immediately sets the field to ready for the hard-delete process. Undelete (if available) restores the field.

Action	Field Label	API Name	Data Type	Indexed	Controlling Field	Modified By	Track History
Erase Undelete	Maximum amount paid	Maximum_amount_paid_del_c	Roll-Up Summary (MAX Payment)			Harsha Hargunani, 09/09/2023, 10:08 pm	<input type="checkbox"/>
Erase Undelete	Number of Payments	Number_of_Payments_del_c	Roll-Up Summary (COUNT Payment)			Harsha Hargunani, 09/09/2023, 9:53 pm	<input type="checkbox"/>
Erase Undelete	Total amount paid	Total_amount_paid_del_c	Roll-Up Summary (SUM Payment)			Harsha Hargunani, 09/09/2023, 10:07 pm	<input type="checkbox"/>

Erasing a custom field will:

- Permanently delete all the data that currently exists in that field
- Permanently delete all tracked history data associated with the field
- Permanently delete any filters that use the custom field
- Change the result of Assignment or Escalation Rules that rely on the custom field data

Erasing a custom field is unrecoverable as the data is immediately deleted.

In order to preserve a record of data for future reference, run a data export before deleting custom fields by clicking Setup | Data Management | Data Export.

Yes, I want to permanently delete the custom field.

Delete **Cancel**

Action	Field Label	API Name	Data Type	Indexed
Erase Undelete	Maximum amount paid	Maximum_amount_paid_del_c	Roll-Up Summary (MAX Payment)	
Erase Undelete	Number of Payments	Number_of_Payments_del_c	Roll-Up Summary (COUNT Payment)	
Erase Undelete	Total amount paid	Total_amount_paid_del_c	Roll-Up Summary (SUM Payment)	

Step5: Now, when we again try to “Edit” the Master-Detail Field, the option to “Change field type” is available.

The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. A specific custom field, 'Customer Name', is being edited under the 'Payment' object. The 'Field Information' section is visible, and the 'Change Field Type' button is highlighted with a red circle. The right sidebar shows user settings for 'Comfy' display density and other options like 'Switch to Salesforce Classic'.

Step6: Select “Lookup” under Relationships. Click “Next” and then “Save”.

The screenshot shows the 'Object Manager' step 1: Choose the field type screen. The 'Lookup Relationship' option is selected under the 'Data Type' section. The description explains that it creates a relationship between the current object and another object, allowing users to select values from a lookup list. The 'Next' button is visible at the top right.

It's done. We've successfully changed the field type from Master-Detail to Lookup Relationship Type.

Fields & Relationships
6 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CON
Amount paid	Amount_paid_c	Currency(5, 0)	
Created By	CreatedById	Lookup(User)	
Customer Name	Customer_Name__c	Lookup(Customer)	✓
Last Modified By	LastModifiedById	Lookup(User)	
Owner	OwnerId	Lookup(User,Group)	✓
Payment ID	Name	Auto Number	✓

Q11. Create two Objects: "Car" and "Insurance". Create some Fields. Create some records in the Insurance Object. Create a Lookup Relationship.

Ans.

1. Following fields and records were created in the "Car" object.

Fields & Relationships
5 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CON
Car Name	Name	Text(80)	
Created By	CreatedById	Lookup(User)	
Last Modified By	LastModifiedById	Lookup(User)	
License Plate No	License_Plate_No__c	Text(7)	
Owner	OwnerId	Lookup(User,Group)	✓

Recently Viewed

Car Name
Volkswagen Jetta
Toyota Camry
Honda Civic

Harsha Hargunani
btscom-dev-ed.develop.my.salesforce.com
Settings Log Out

DISPLAY DENSITY

✓ Comfy

Compact

OPTIONS

Switch to Salesforce Classic ⓘ

Add Username

2. Following fields and records were created in the “Insurance” object.

Fields & Relationships

FIELD LABEL	FIELD NAME	DATA TYPE
Created By	CreatedById	Lookup(User)
Insurance ID	Name	Auto Number
Last Modified By	LastModifiedById	Lookup(User)
Owner	OwnerId	Lookup(User,Group)
Validity	Validity__c	Date

Harsha Hargunani
btscom-dev-ed.develop.my.salesforce.com
Settings Log Out

DISPLAY DENSITY

✓ Comfy

Compact

OPTIONS

Switch to Salesforce Classic ⓘ

Add Username

Recently Viewed

2 items • Updated a few seconds ago

	Insurance ID
1	102
2	101

Search this list...

New Import Change Owner

25°C Cloudy ENG IN 10:18 AM 10-09-2023

3. Build a “Lookup” relationship on Insurance.

SETUP > OBJECT MANAGER

Insurance

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Harsha Hargunani
btscos-dev-ed.develop.my.salesforce.com
Settings Log Out

DISPLAY DENSITY

✓ Comfy

Compact

OPTIONS

Switch to Salesforce Classic Add Username

Related To Car

Previous Next Cancel

25°C Cloudy ENG IN 10:24 AM 10-09-2023

06:25 - CRM Practical Assignment | ↗ Inbox (1,302) - hargunaniharsha | Recently Viewed | Insurances | Insurance | Salesforce

btscm-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01l5j000002JwQ8/FieldsAndRelationships/view

Setup Home Object Manager

SETUP > OBJECT MANAGER Insurance

Fields & Relationships

6 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE
Car Name	Car__c	Lookup(Car)
Created By	CreatedBy	Lookup(User)
Insurance ID	Name	Auto Number
Last Modified By	LastModifiedBy	Lookup(User)
Owner	OwnerId	Lookup(User,Group)
Validity	Validity__c	Date

DISPLAY DENSITY

✓ Comfy

Compact

OPTIONS

Switch to Salesforce Classic ⓘ

Add Username

25°C Cloudy ENG IN 10:25 AM 10-09-2023

4. Now we can see "Car" appearing in the Lookup dialog.

04:21 - CRM Practical Assignment | ↗ Inbox (1,302) - hargunaniharsha | New Insurance | Insurance | Salesforce

btscm-dev-ed.develop.lightning.force.com/lightning/o/Insurance__c/new?count=1&nooverride=1&useRecordTypeCheck=1&navigationLocation=LIST_VIEW&uid=1694285847572328... Search

Home Dashboards Customers Chatter Reports Addresses Students Details Insurances More

New Insurance

Information

Insurance ID: 102

Owner: Harsha Hargunani

Validity: 27/11/2025

Car Name:

Search Cars...
Recent Cars:
Volkswagen Jetta
Toyota Camry
Honda Civic
+ New Car

Save

25°C Cloudy ENG IN 10:27 AM 10-09-2023

Q12. Try to convert into a Master Details Relationship. And check what happens?

Ans.

1. Select the Lookup field that is Car Name | Edit | Change field type | Master-Detail | Next | Save

02:15 - CRM Practical Assignment | Recently Viewed | Insurances | Search Setup | Insurance | Salesforce

SETUP > OBJECT MANAGER Insurance

Details

Fields & Relationships

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters

Edit Insurance Custom Field
Car Name

Custom Field Definition Edit

Change Field Type Save Cancel

Field Information

Field Label: Car Name
Field Name: Car
Description:
Help Text:
Data Owner: User
Field Usage: --None--
Data Sensitivity Level: --None--

Have feedback on lookup filters? Comment on IdeaExchange! Help for this Page

Cloudy 25°C 12:30 AM IN 10-09-2023

02:04 - CRM Practical Assignment | Recently Viewed | Insurances | Search Setup | Object Manager | Salesforce

SETUP > OBJECT MANAGER

Object Manager

Step 1. Choose the field type

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

Data Type

None Selected Select one of the data types below.

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.

Next Cancel

Harsha Hargunani
btscom-dev-ed.develop.my.salesforce.com
Settings Log Out

DISPLAY DENSITY
✓ Comfy
Compact

OPTIONS
Switch to Salesforce Classic Add Username

Cloudy 25°C 12:30 AM IN 10-09-2023



SETUP
Error

Cannot Create Master-Detail Relationship

You cannot create a new Master-Detail relationship on an existing custom object if records already exist. You must first create a Lookup relationship, populate the lookup field with data in all records, and then change the relationship type to Master-Detail.

The warning mentioned above is triggered due to the presence of records on the child/detail side of the relationship. However, a similar error does not occur when attempting to establish a 'Lookup' relationship with existing records. This is because the Parent field is not mandatory in a Lookup relationship and can be left empty.

Insurance
102

Related	Details
Insurance ID	102
Validity	12/06/2024
Car Name	
Created By	Harsha Hargunani, 10/09/2023, 12:18 am
Owner	Harsha Hargunani
Last Modified By	Harsha Hargunani, 10/09/2023, 12:18 am

In contrast, such a scenario is not acceptable for a master-detail relationship, where the Parent field must have a value and cannot be left blank.

2. Edit these records and fill all the empty Lookup fields.

The screenshot shows a Salesforce Lightning interface. In the center, there's an 'Edit 101' screen for an Insurance record. On the left, a sidebar titled 'Recently Viewed' lists items like 'Insurance ID 101', '102', and '103'. The main form has fields for 'Insurance ID' (101), 'Owner' (Harsha Hargunani), 'Validity' (05/09/2028), and 'Car Name'. A dropdown menu for 'Car Name' is open, showing a search bar and a list of recent cars: Volkswagen Jetta, Toyota Camry, Honda Civic, and a '+ New Car' option. A pink checkmark is placed next to the '+ New Car' option. The status bar at the bottom shows it's 10:42 AM on 10-09-2023.

3. Now we can change the field type from lookup to master-detail without any error.

The screenshot shows the Salesforce Setup Object Manager for the 'Insurance' object. On the left, a sidebar lists options like Details, Fields & Relationships, Page Layouts, etc. The main area is titled 'Fields & Relationships' and shows a table with five items. One row is highlighted: 'Car Name' (Field Label), 'Car__c' (Field Name), and 'Master-Detail(Car)' (Data Type). The 'Data Type' column is underlined with a pink line. To the right, a user profile for 'Harsha Hargunani' is shown, along with 'DISPLAY DENSITY' (set to 'Comfy') and 'OPTIONS' (with links to 'Switch to Salesforce Classic' and 'Add Username'). The status bar at the bottom shows it's 10:43 AM on 10-09-2023.

Q13. Create "Cross Formula Field" on Account and Contact objects. Show Account Rating at Contact side.

Ans. Cross-Formula Field is used to show parent data at the child side. And this field is created at the child side.

1. New Field | Data type - formula

The screenshot shows the Salesforce Setup interface. On the left, there's a sidebar with links like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main area is titled "Fields & Relationships" and lists various fields with their labels, names, and data types. A "New" button is highlighted with a red circle. On the right, there's a user profile for Harsha Hargunani and settings for display density (set to "Comfy") and options (with "Switch to Salesforce Classic" and "Add Username" buttons). The bottom of the screen shows a Windows taskbar with icons for various applications and the date/time (10-09-2023).

2. From "insert field" get the "Rating" field.

The screenshot shows the "Insert Field" dialog for the Contact object. It displays a tree view of available fields under "Contact >" and "Account >". The "Rating" field is selected and highlighted with a red circle. To the right, a summary box says "You have selected: Account.Rating, Type: Picklist, API Name: Account.Rating" with an "Insert" button. The background shows the same sidebar and taskbar as the previous screenshot.

3. Enclose it within the TEXT() operator and click "save".

The screenshot shows the Salesforce Setup interface for creating a new field. The left sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, etc. The main area is titled 'Contact' under 'Object Manager'. A formula editor is open with the following code:

```
Account Rating (Text) =  
TEXT(Account_Rating)
```

A tooltip from the 'Insert Operator' dropdown is visible, showing the 'TEXT' function with its description: 'Converts a value to text using standard display format'. The status bar at the bottom shows weather as 'Mostly cloudy' and the date/time as '10-09-2023 01:14 AM'.

Q14. Show Account Type at Contact Side, ONLY IF Account Rating is Hot.

Ans. New Field | Type - formula | Label - Account Type | Return Type - Text | Advanced formula

The screenshot shows the Salesforce Setup interface for creating a new formula field. The left sidebar lists various setup options. The main area is titled 'Contact' under 'Object Manager'. A formula editor is open with the following code:

```
Account Type (Text) =  
IF( ISPICKVAL( Account_Rating, "Hot" ), TEXT( Account_Type ), '' )
```

A tooltip from the 'Insert Operator' dropdown is visible, showing the 'IF' function with its parameters: 'ISPICKVAL(Account_Rating, "Hot")' and 'TEXT(Account_Type)'. A 'Quick Tips' box is also visible on the right. The status bar at the bottom shows weather as 'Mostly cloudy' and the date/time as '10-09-2023 01:24 AM'.

"Type" field is getting fetched from Account object and the field was inserted by-

The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. A modal window titled 'Insert Field' is open, displaying a hierarchical tree of fields. The path 'Contact > Account >' is selected. Under 'Account', the 'Type' field is highlighted and selected. The status bar at the bottom right indicates it's 01:23 AM on 10-09-2023.

Q15. Show Account SLA at Opportunity, only if Account Rating is Cold and Opportunity Amount > 5000.

Ans. Opportunity Fields - The fields for opportunities contain a range of information to help you track your pending and potential sales. Depending on your page layout and field-level security settings, some fields aren't visible or editable.

The screenshot shows the Salesforce Help Center with the 'Opportunity Fields' page selected. On the left, a sidebar lists various topics under 'Opportunity Fields'. On the right, a table provides detailed descriptions for three fields: 'Account Name', 'Amount', and 'Close Date'. The status bar at the bottom right indicates it's 01:52 AM on 10-09-2023.

FIELD	DESCRIPTION
Account Name	Name of the account that the opportunity is linked to. You can enter the account name or select the account using the lookup icon.
Amount	If you change the account for an opportunity that has partners, all partners are deleted from the Partners related list.
Close Date	Estimated total sale amount. If multiple currencies are enabled, the amount is shown in your personal currency by default. Change the Opportunity Currency picklist to track the amount in another currency.

Step1: Setup | Object Manager | Quick Find Box - "opportunity"

Select Opportunity Object, you can see the "Amount" field there which we will use later.

The screenshot shows the Salesforce Object Manager interface for the Opportunity object. The 'Fields & Relationships' section lists various fields like Account Name, Close Date, and Amount. The 'Amount' field is circled in red with a checkmark. The 'New' button at the top right of the list is also circled in red.

FIELD LABEL	FIELD NAME	DATA TYPE
Account Name	AccountId	Lookup(Account)
Amount	Amount	Currency(16, 2)
Close Date	CloseDate	Date
Contract	ContractId	Lookup(Contract)
Created By	CreatedById	Lookup(User)
Current Generator(s)	CurrentGenerators__c	Text(100)
Delivery/Installation Status	DeliveryInstallationStatus__c	Picklist

Step2: New Field | Data type - Formula | Label - Account SLA | Return Type - Text

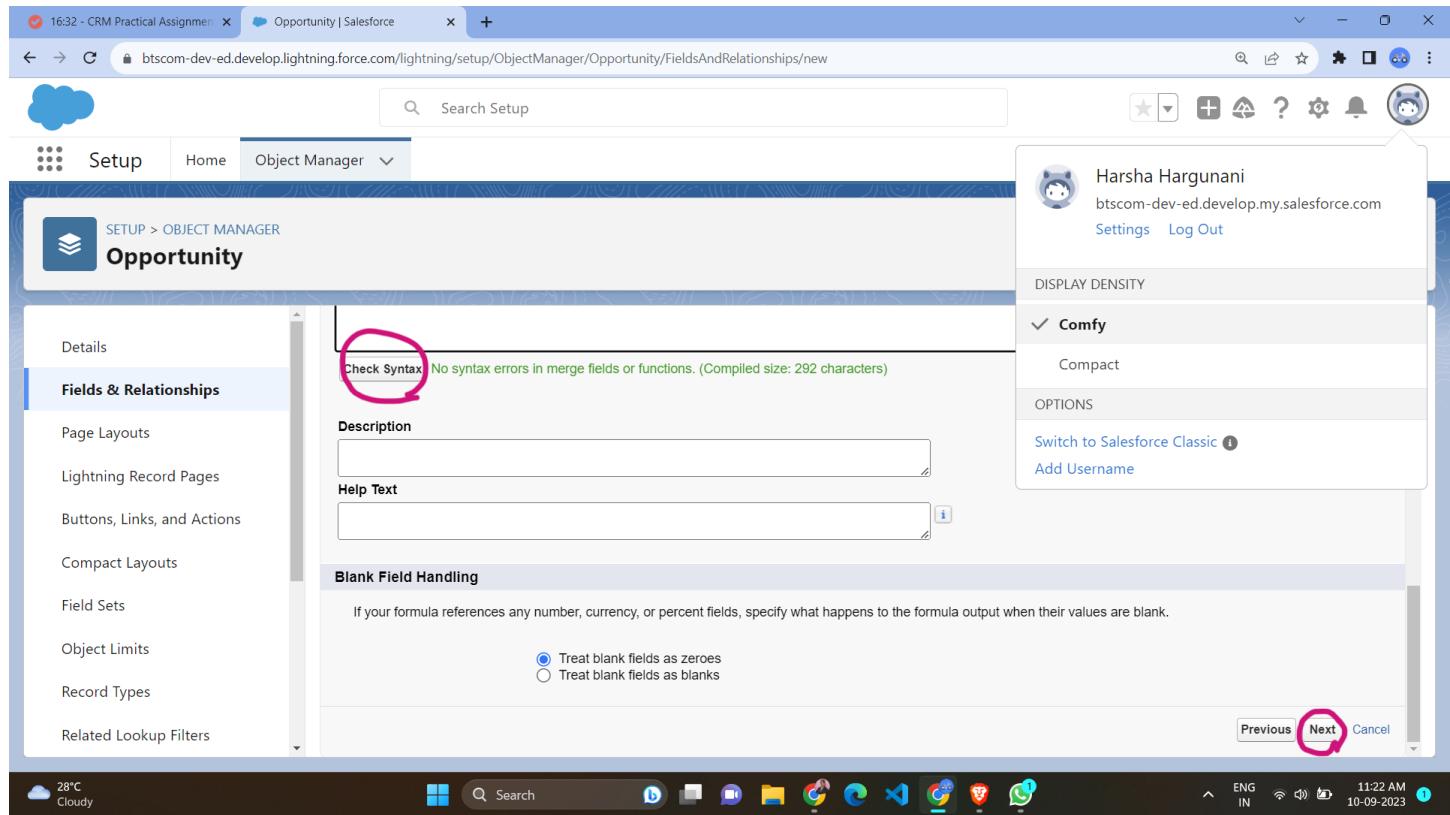
Formula - IF(AND(ISPICKVAL(Account.Type, 'Cold'), Amount > 5000), TEXT(Account.SLA__c), '')

The screenshot shows the creation of a new custom field named 'Account SLA'. The 'Data type' is set to 'Text'. The 'Formula' is defined as:

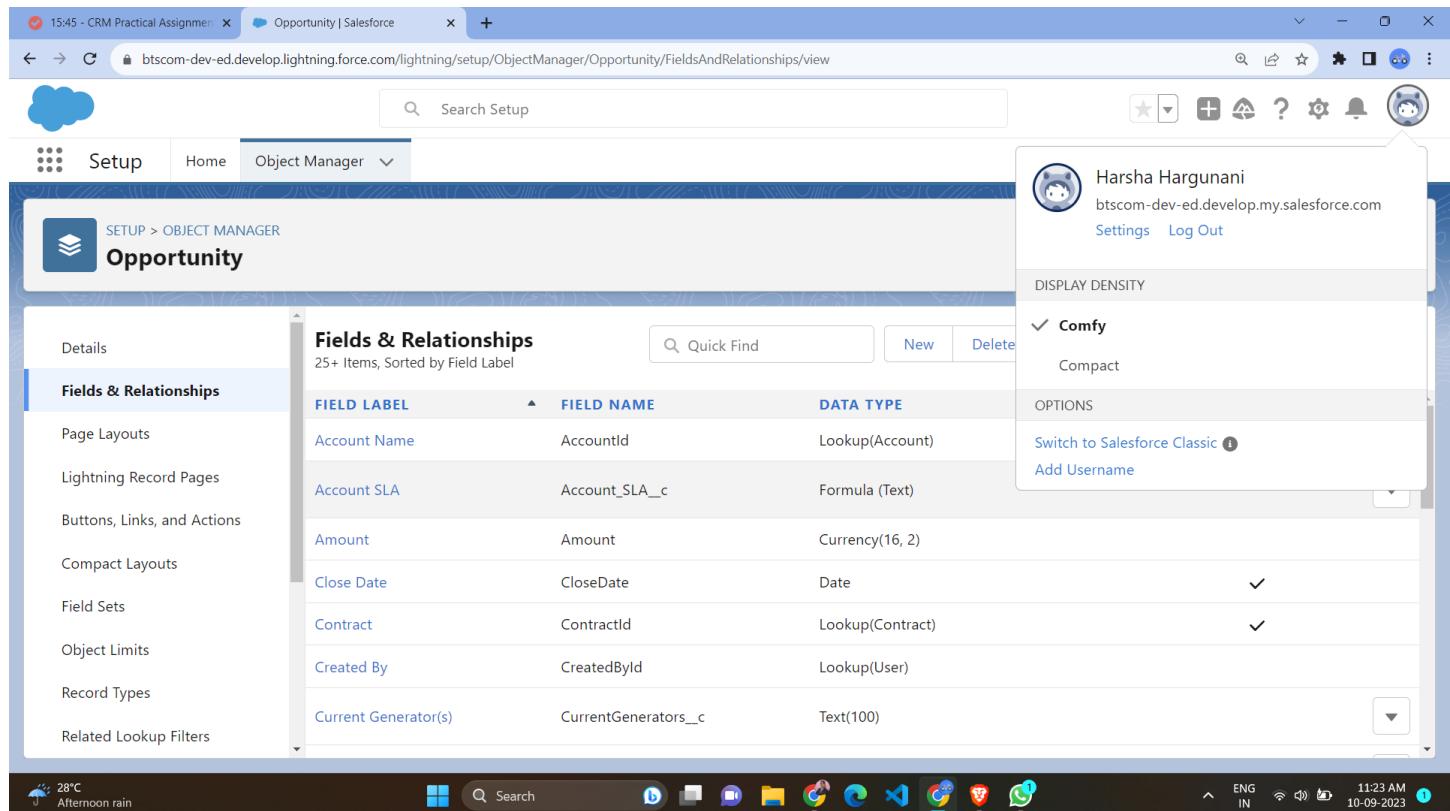
```
IF( AND( ISPICKVAL( Account.Type, 'Cold'), Amount > 5000), TEXT( Account.SLA__c ), '')
```

The 'Label' is 'Account SLA' and the 'Return Type' is 'Text'. A 'Quick Tips' box on the right provides links to 'Getting Started' and 'Operators & Functions'.

Step3: Check Syntax | Next | Next | Save.



The screenshot shows the 'Opportunity' object setup page in the 'Fields & Relationships' tab. A red circle highlights the 'Check Syntax' button, which displays the message 'No syntax errors in merge fields or functions. (Compiled size: 292 characters)'. The right sidebar shows user information and display density settings.



The screenshot shows the 'Opportunity' object setup page in the 'Fields & Relationships' tab. A red circle highlights the 'Next' button at the bottom of the page. The right sidebar shows user information and display density settings.