CRM Practical 4

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Batch. E1
Roll no. 09
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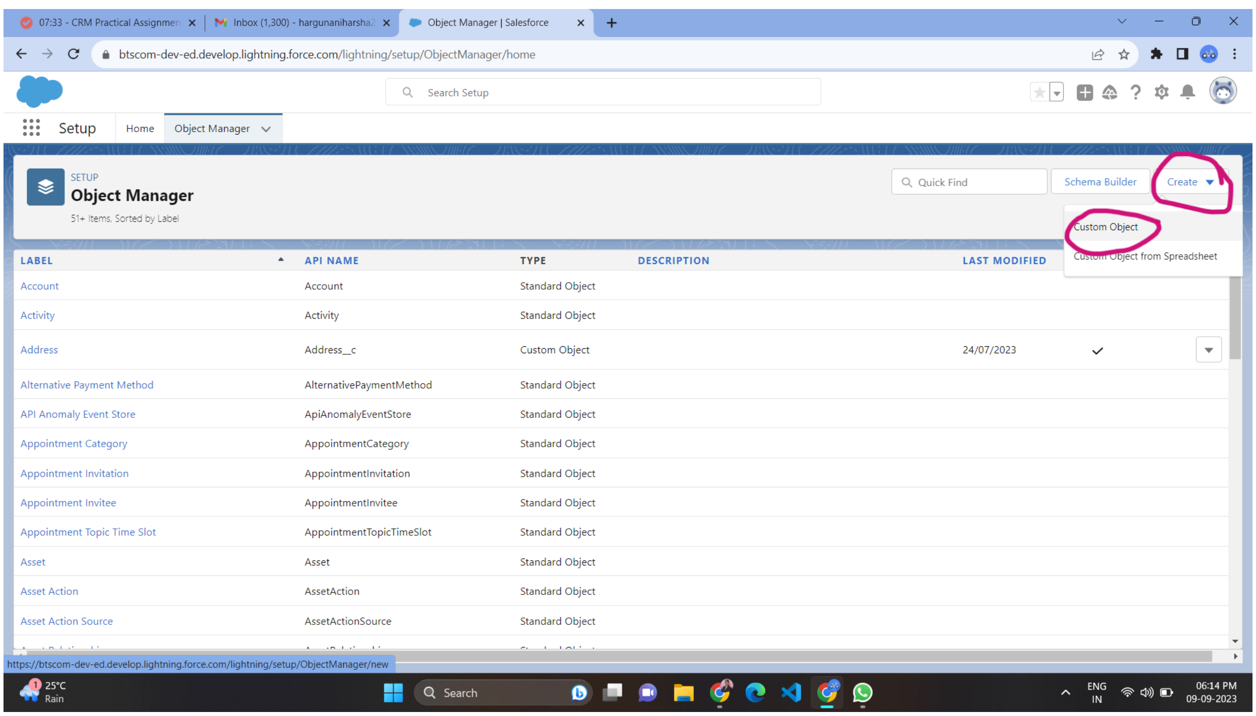
Assignment Ques

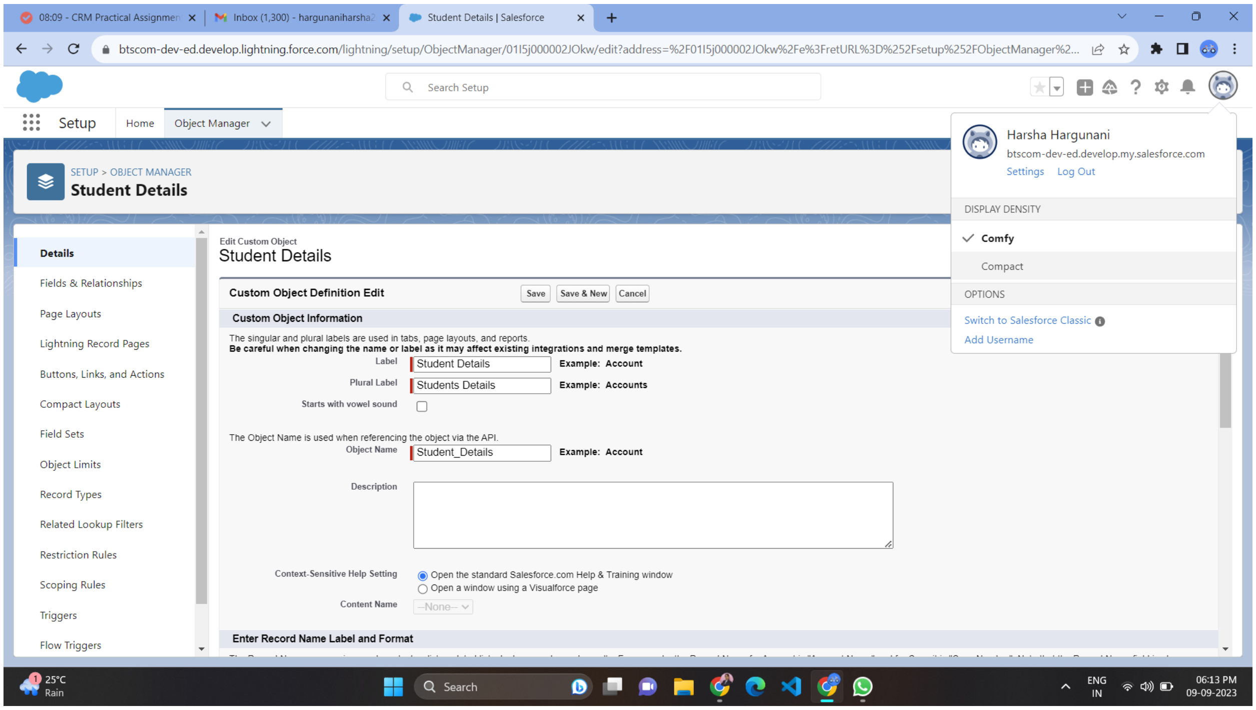
Q1. Create two Objects “Student” and “Subject”.

Ans.

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

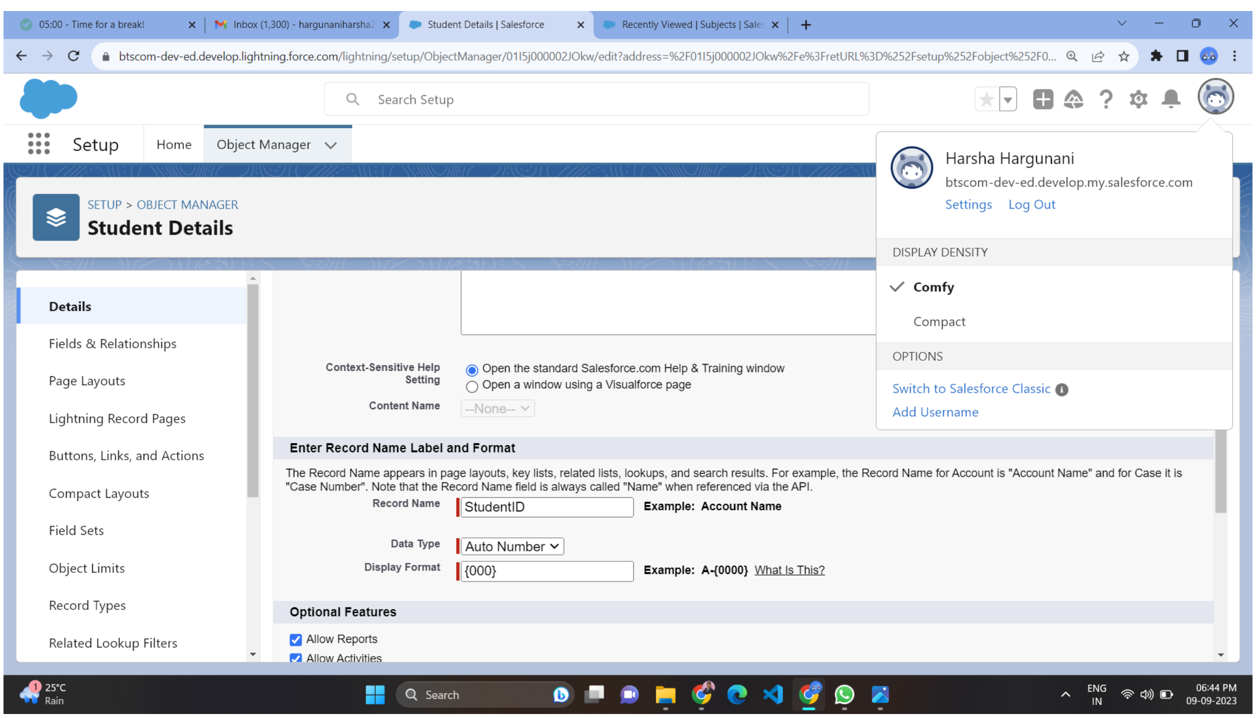


2. Enter Field Label and description.

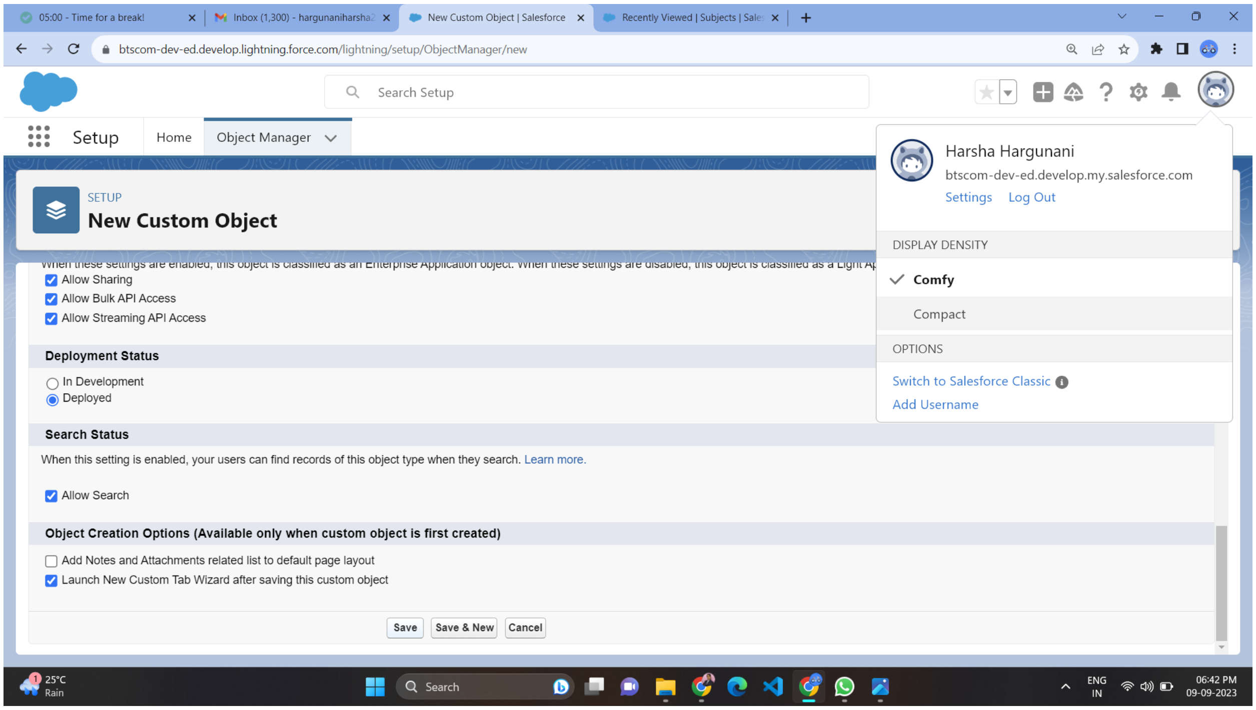


3. Enter Record Name - StudentID
   Data Type - Auto Number
   Display Format - {000}

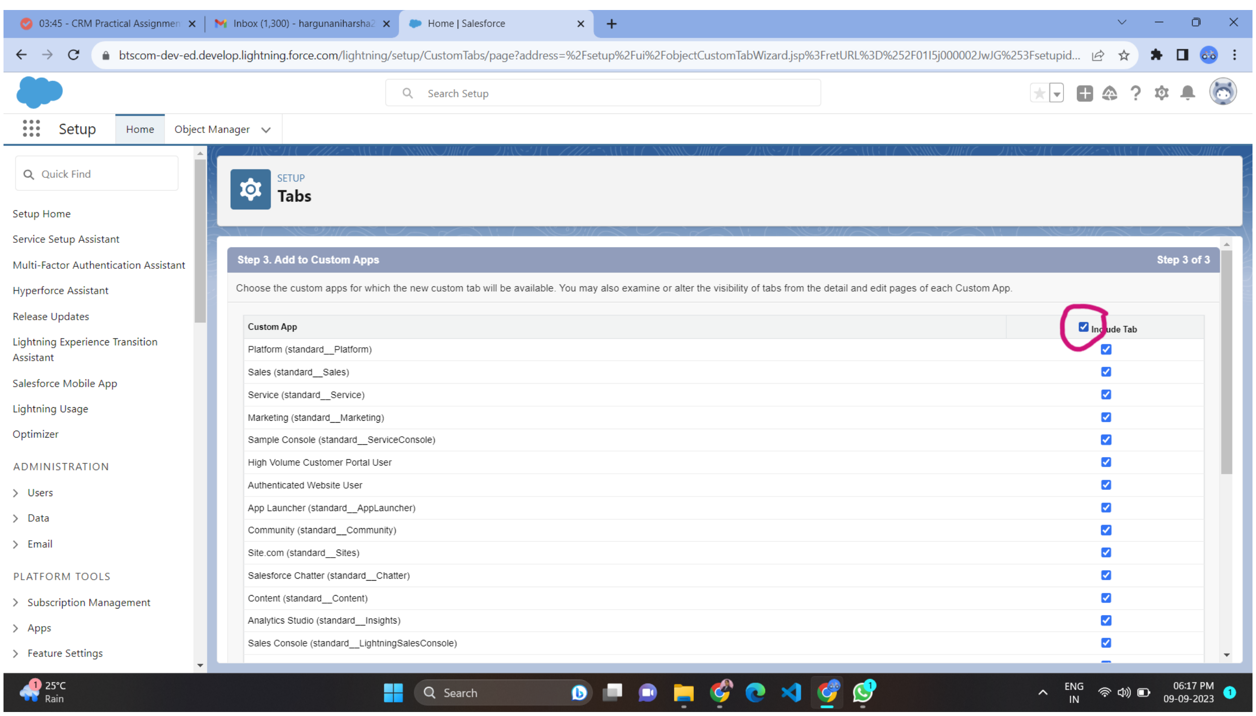
   Or Keep it “Full Name” - Text

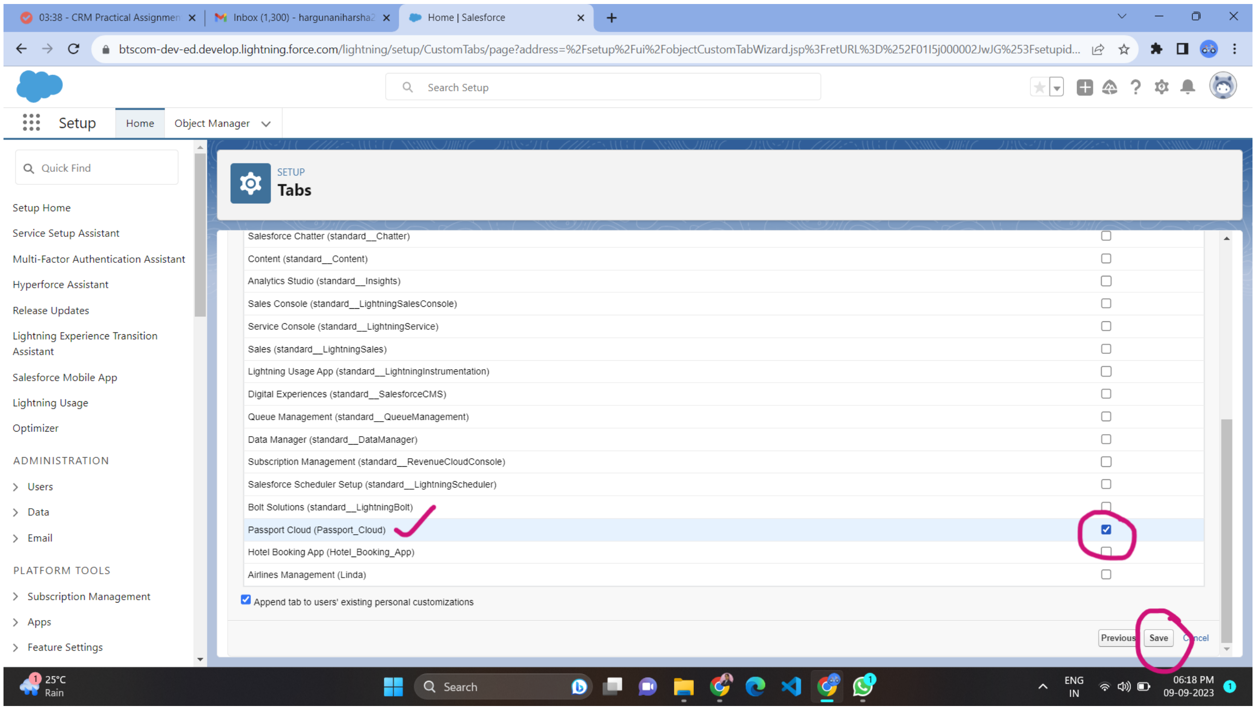


4. Check the “Allow Search” box and “Launch New Custom Tab Wizard” before saving.



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



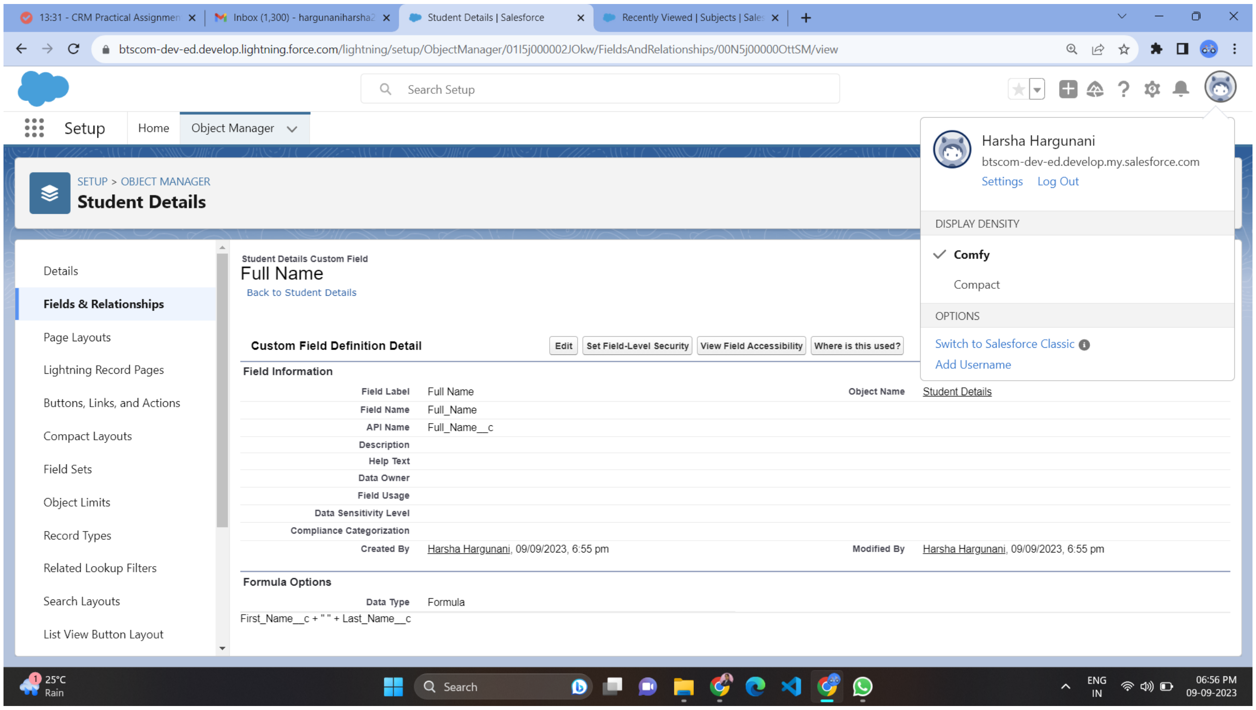


6. Create Fields such as

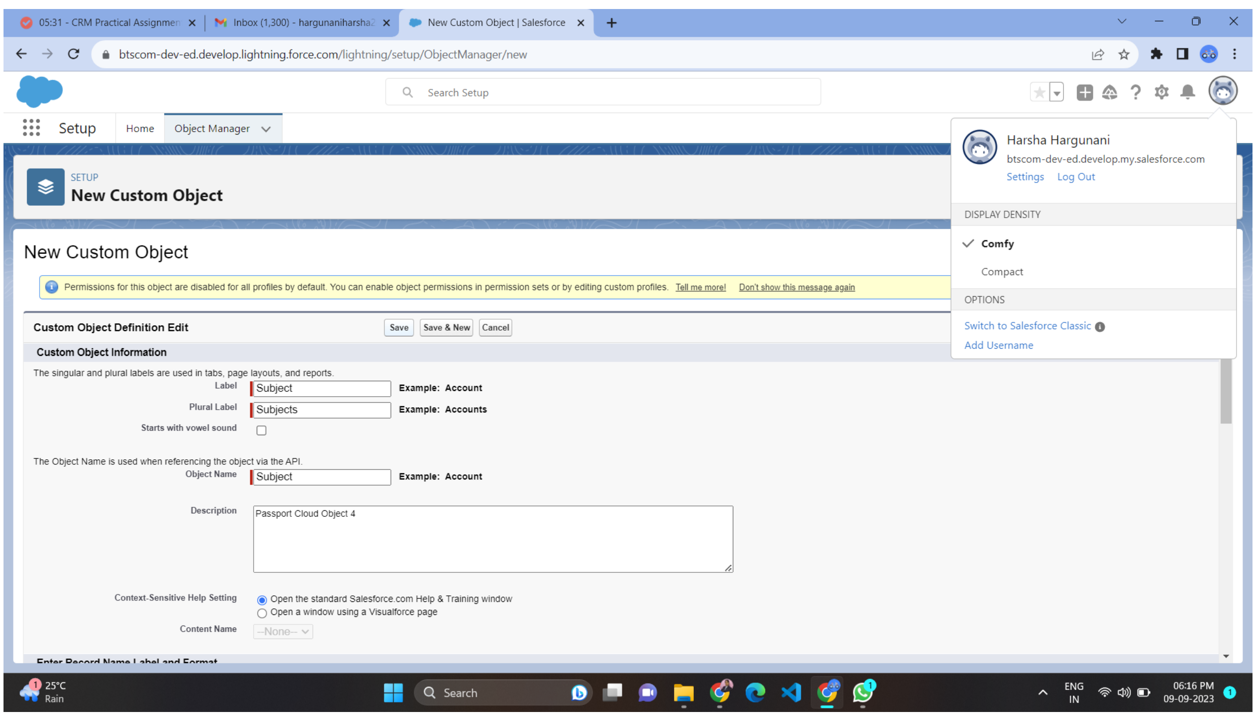
Label	Field Return Type
Full Name	Text
Email ID	Email
Phone No	Phone

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

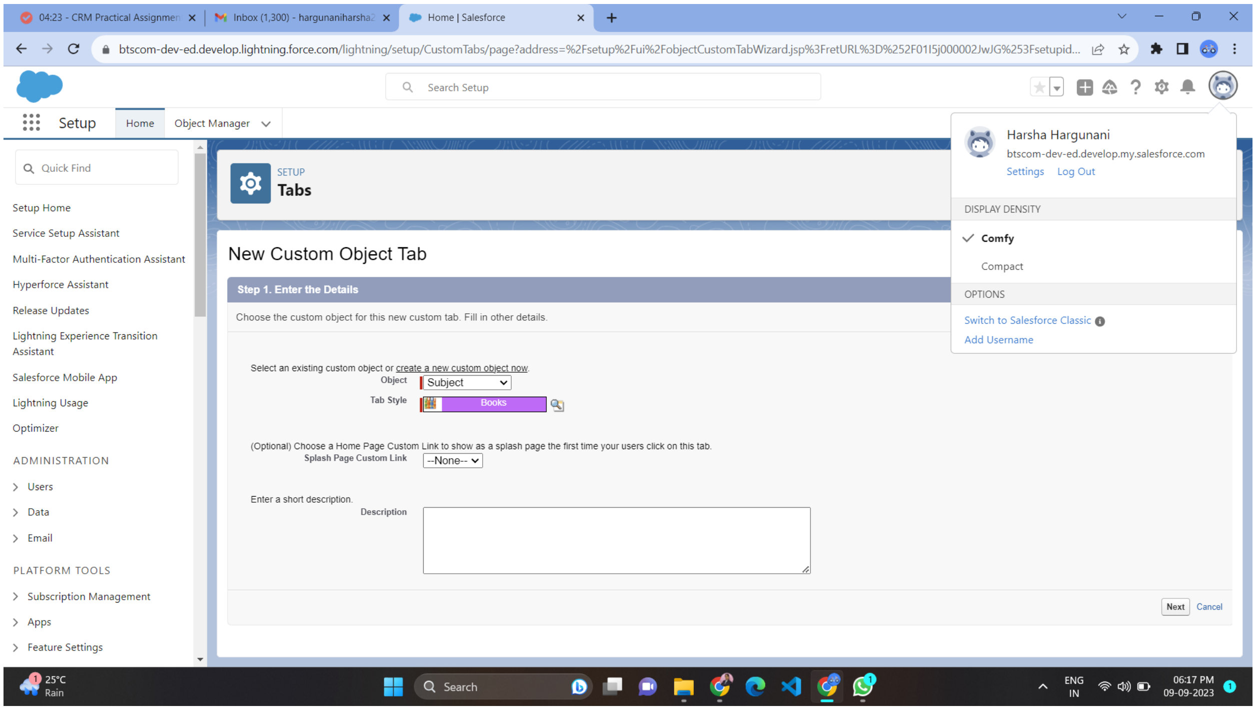
Formula = First_Name__c + " " + Last_Name__c



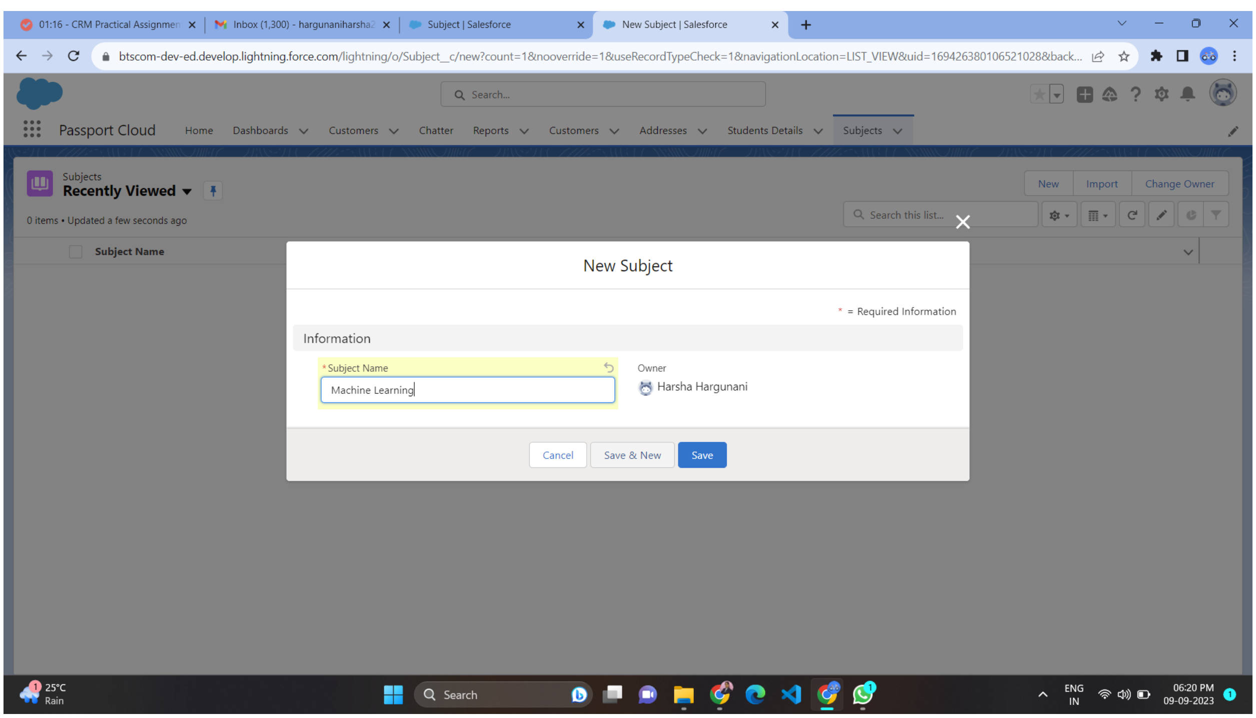
7. Create a new Custom Object “Subject” following the same instructions. Keep the Record Format “Text” here and Label as “Subject Name”.

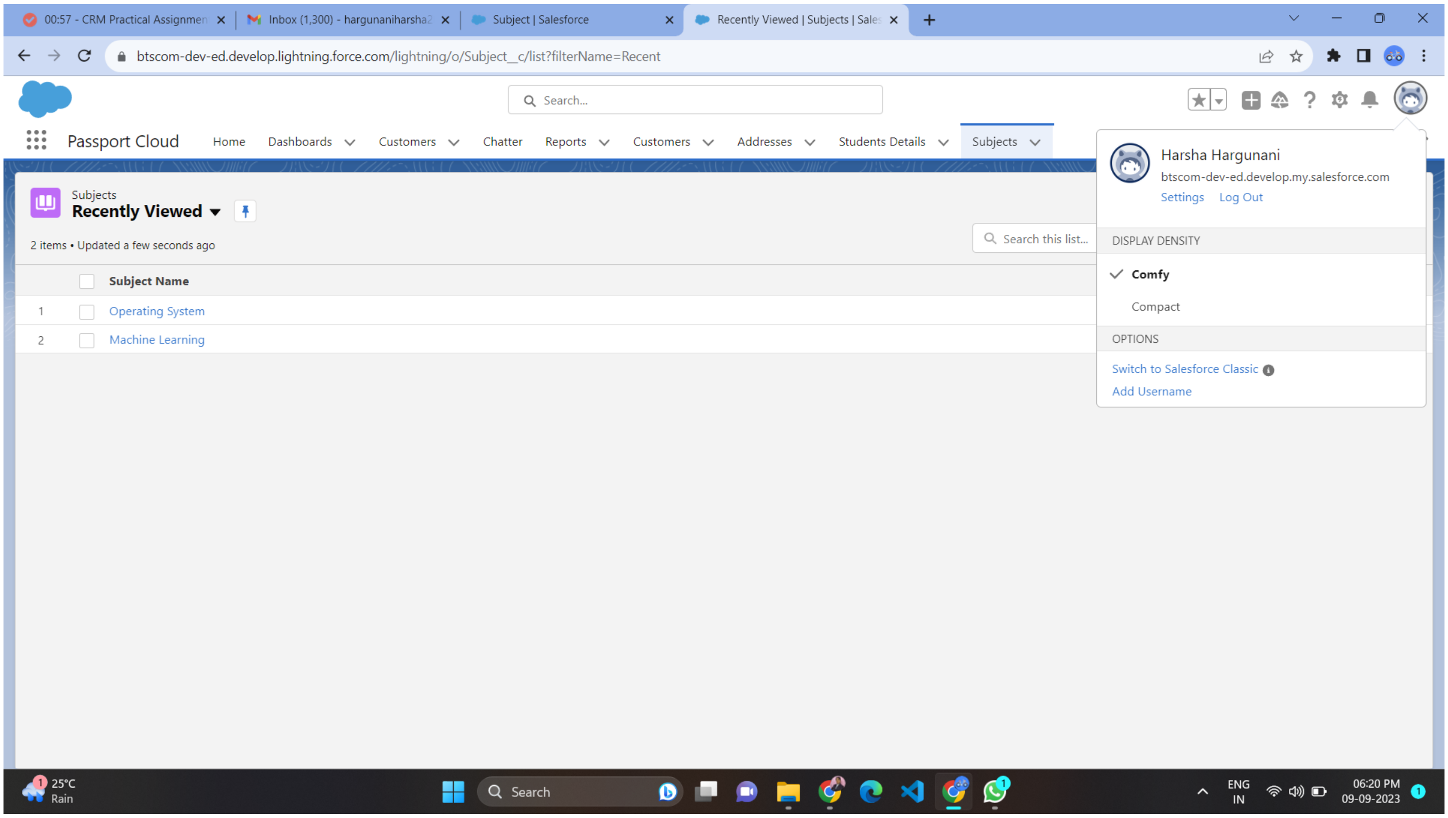


8. Select an icon for the Subject Tab.

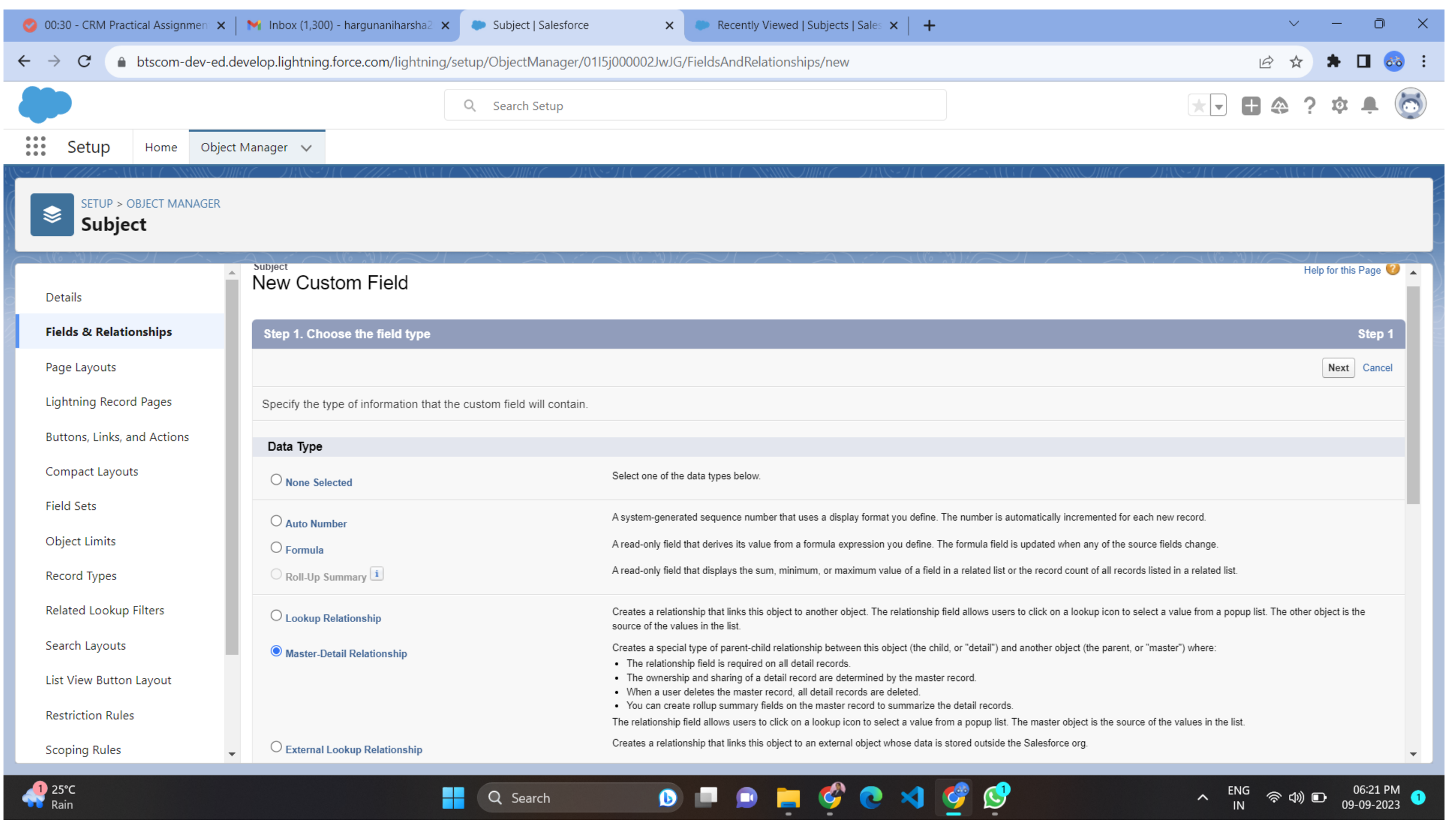


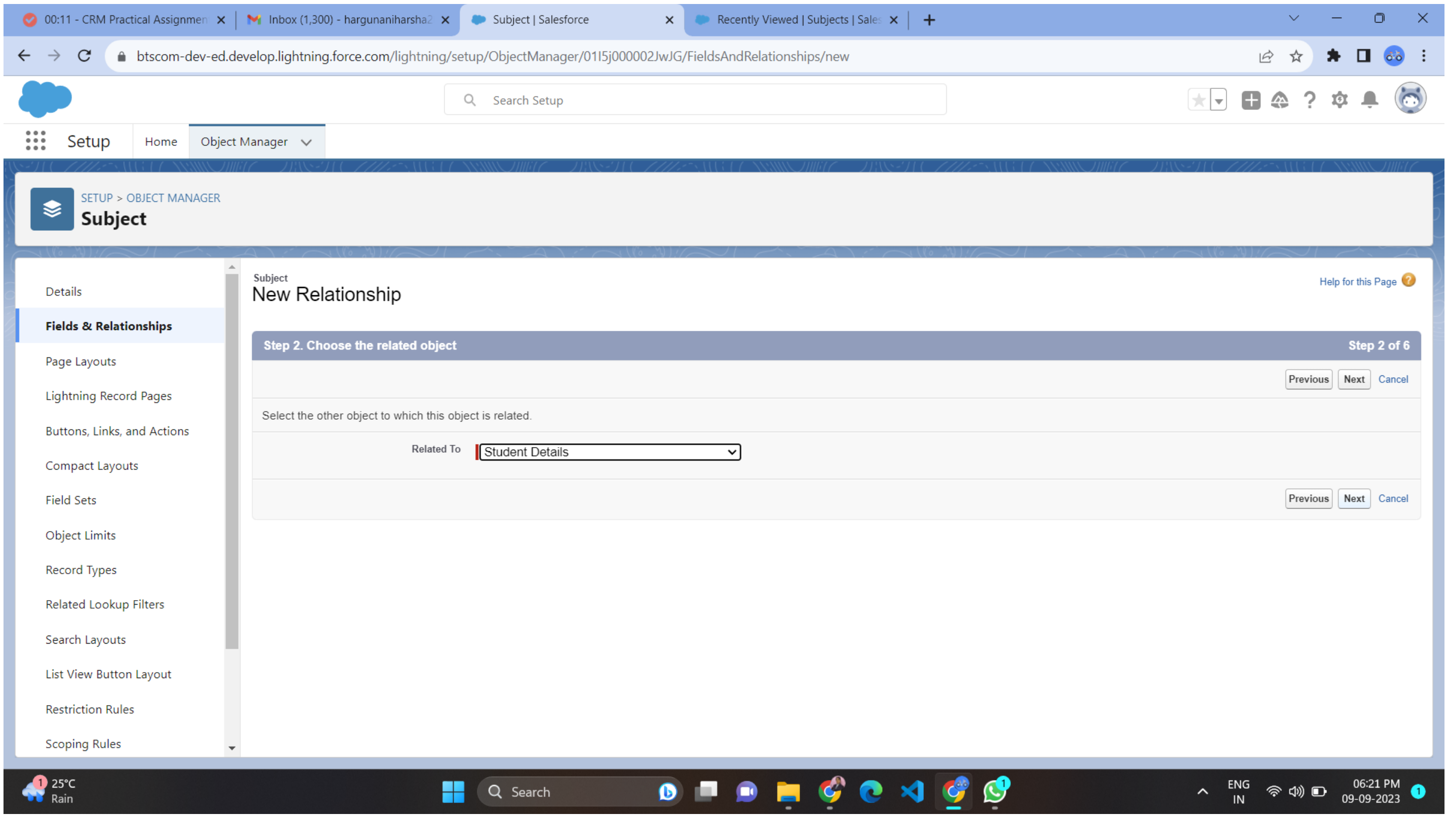
9. Before creating a Master-Detail relationship, let's verify if the relationship can be established while there are pre-existing records on the Detail side.
    a) Create 1 or 2 records under Subject Tab.

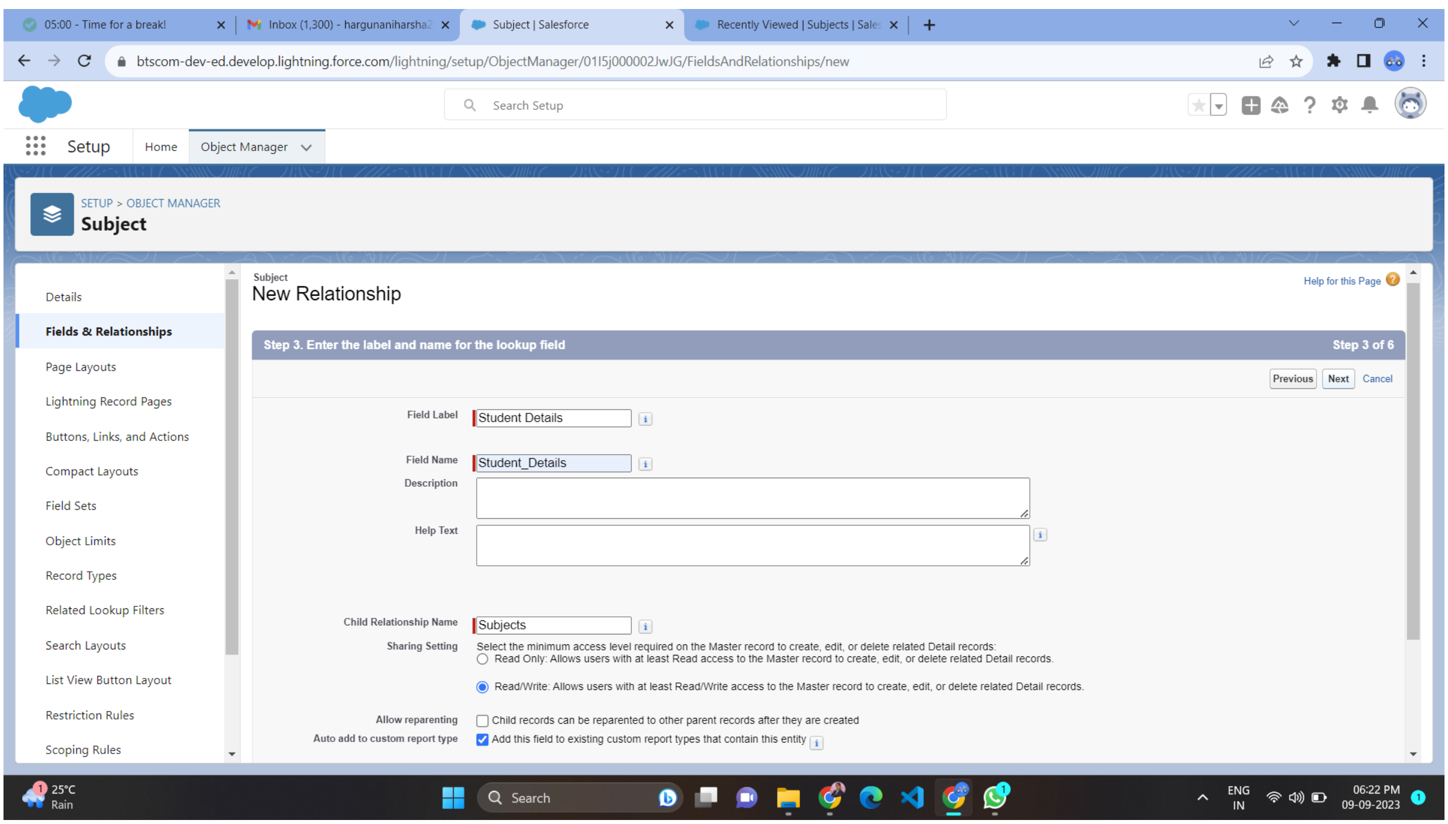


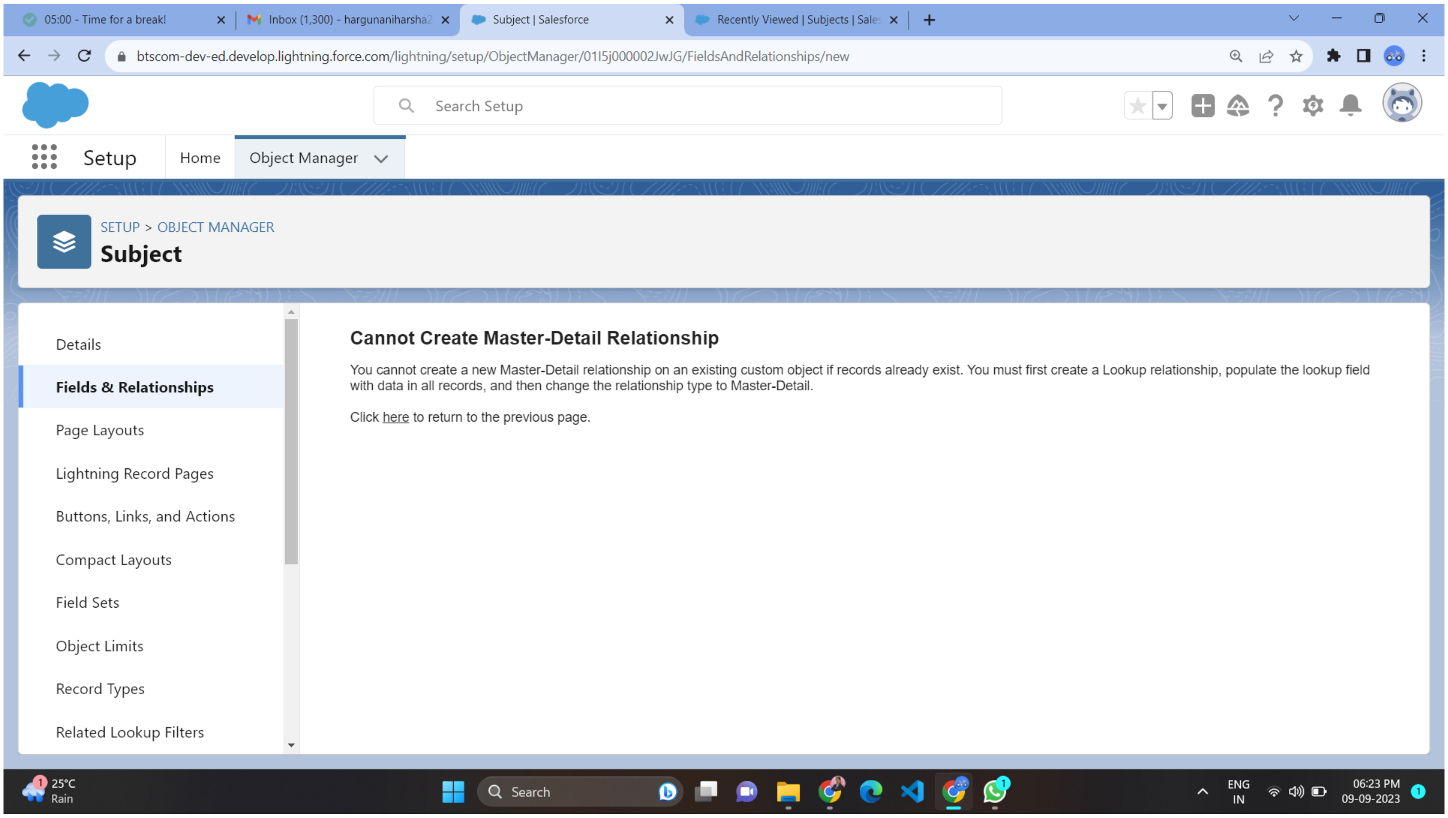


b) Attempt to create a new field of master-detail type on “Subject”.



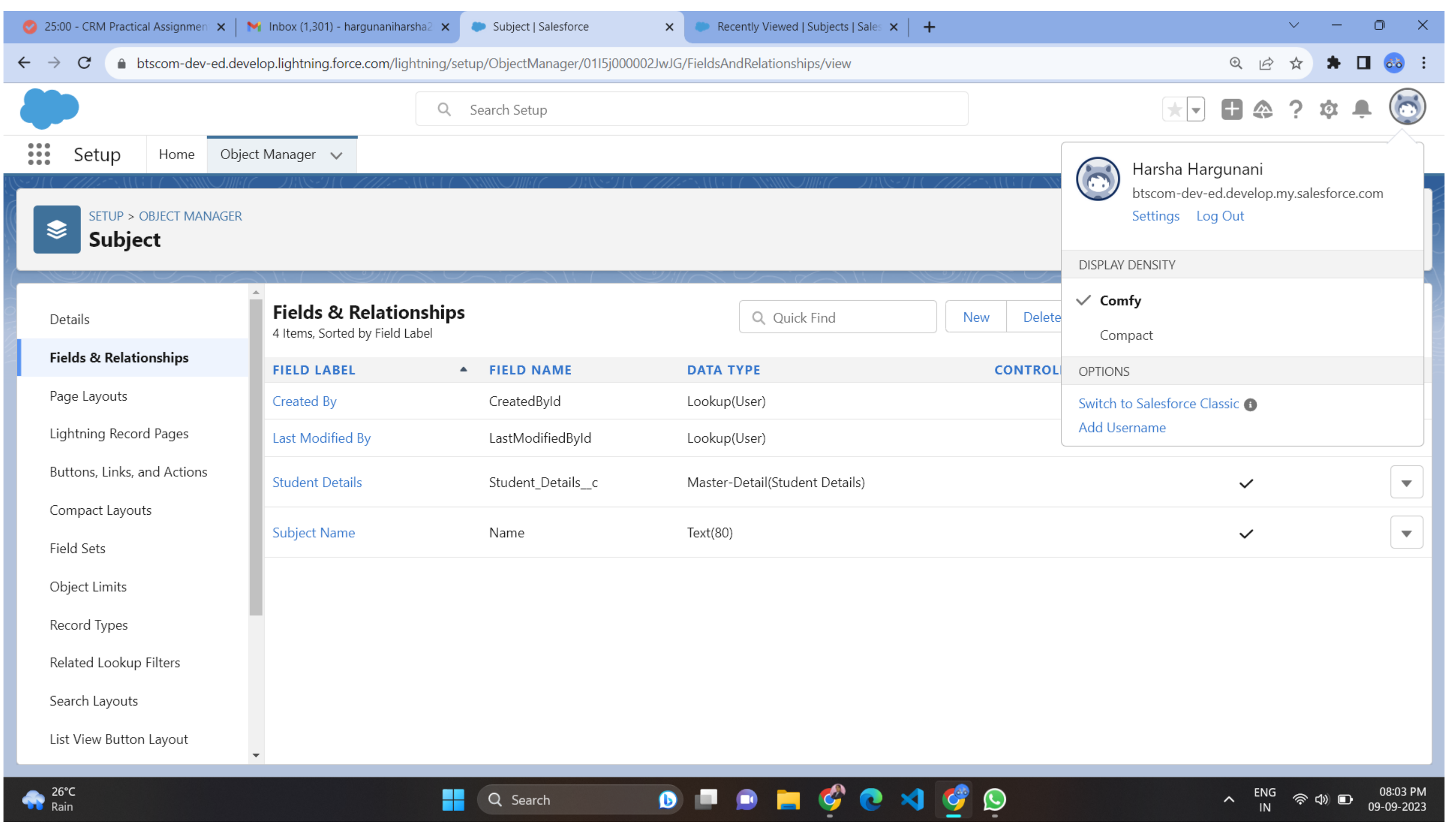

btscom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I5j000002JwJG/FieldsAndRelationships/new
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Subject
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Subject
New Relationship
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
Student Details
06:21 PM
09-09-2023


btscom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I5j000002JwJG/FieldsAndRelationships/new
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Subject
Subject
New Relationship
Help for this Page
Step 3. Enter the label and name for the lookup field
Step 3 of 6
Previous
Next
Cancel
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
06:22 PM
09-09-2023

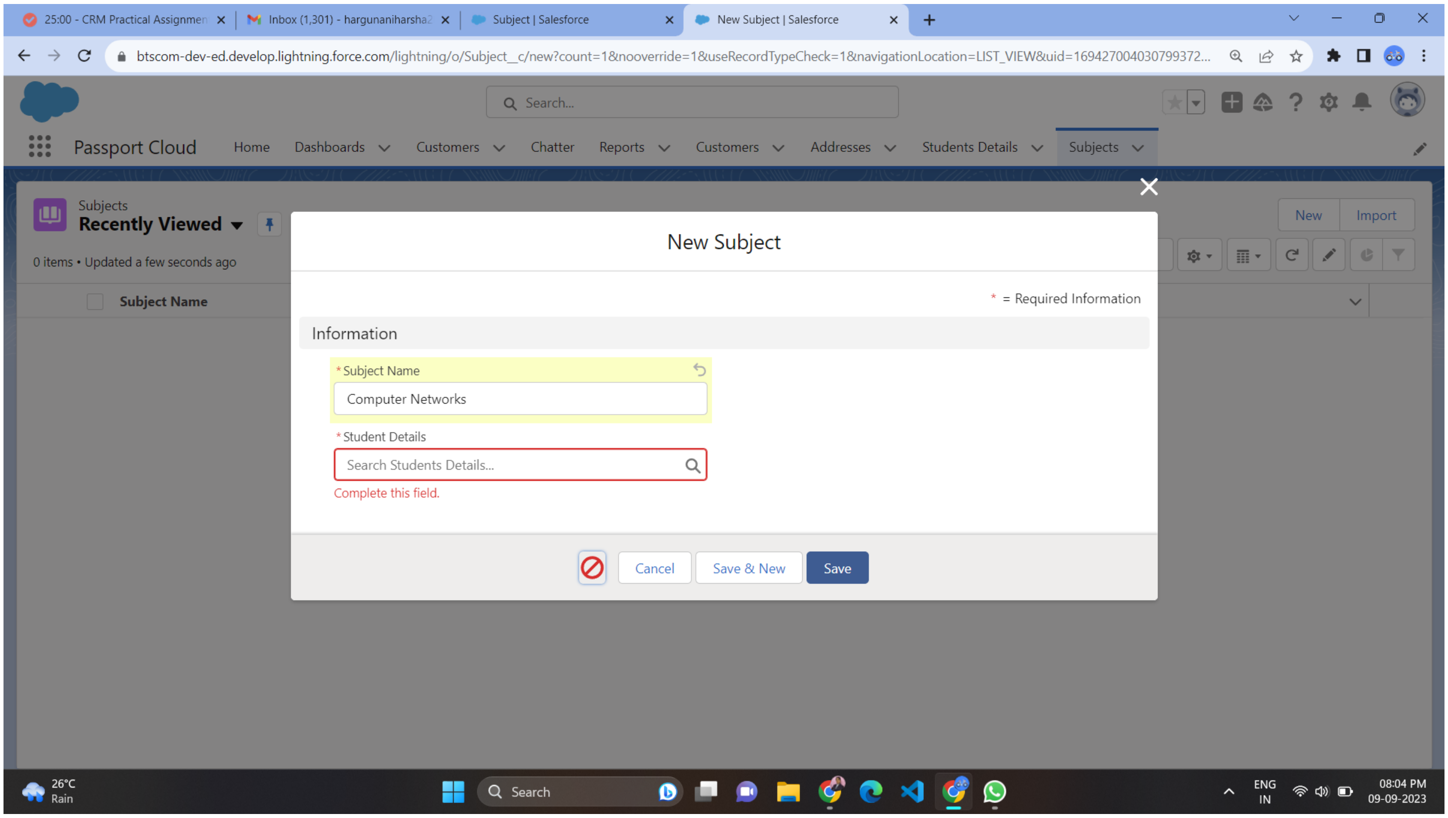


c) Bravo! Hence, we can conclude that "A new Master-Detail relationship cannot be created on a custom object if records already exist on the Detail side".

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

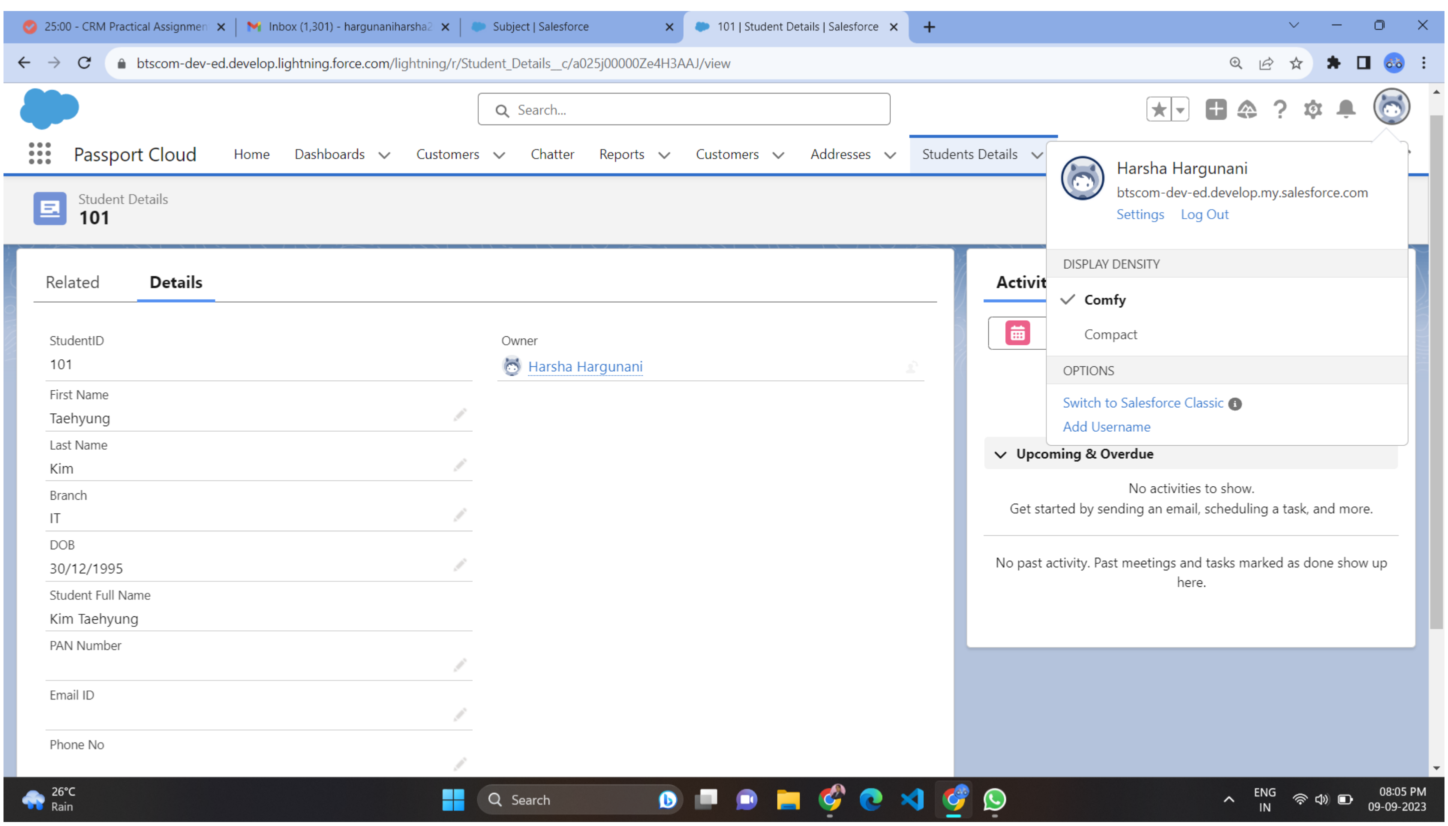


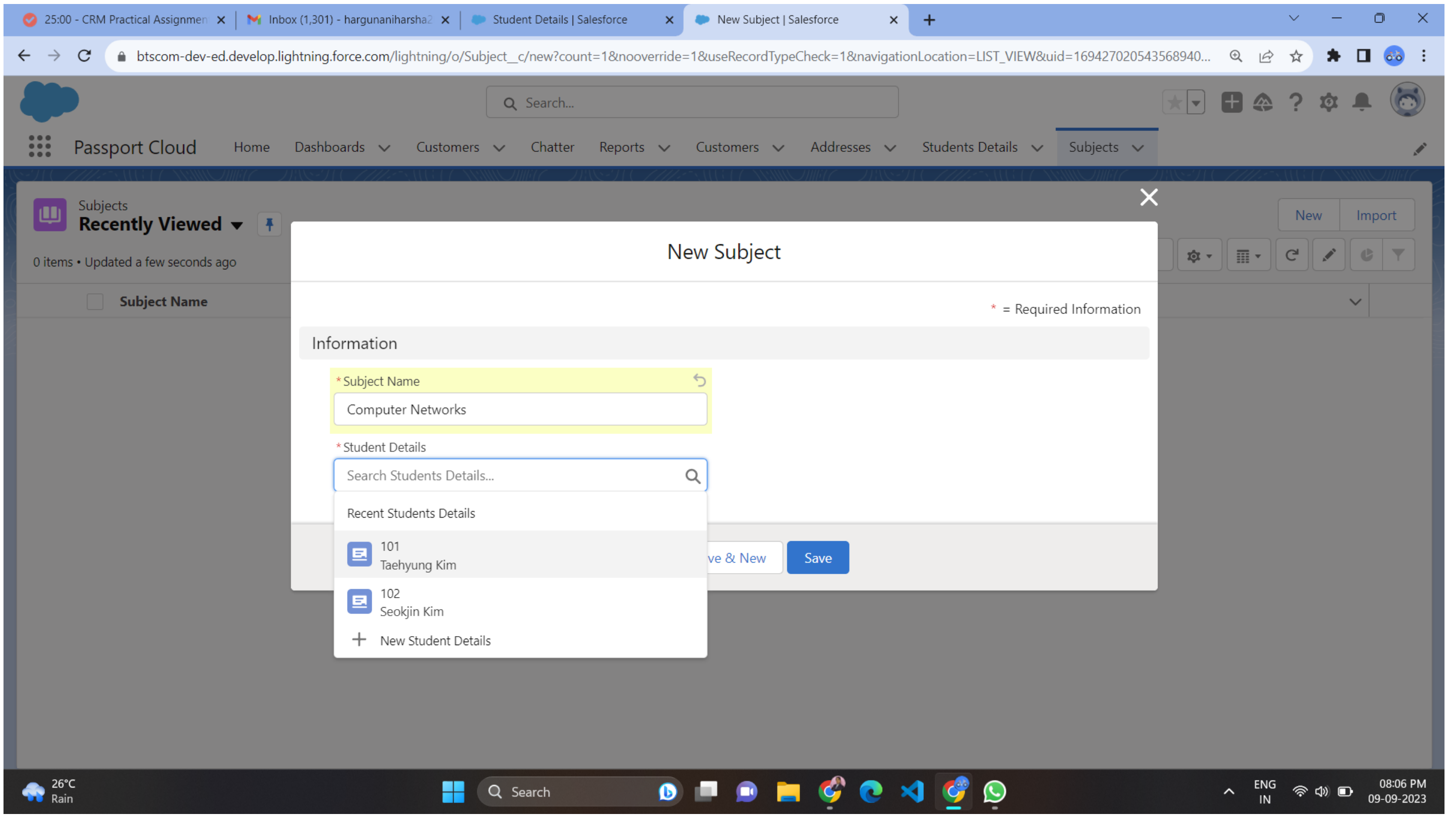
11. “Master is mandatory while creating Details (Child) records.”

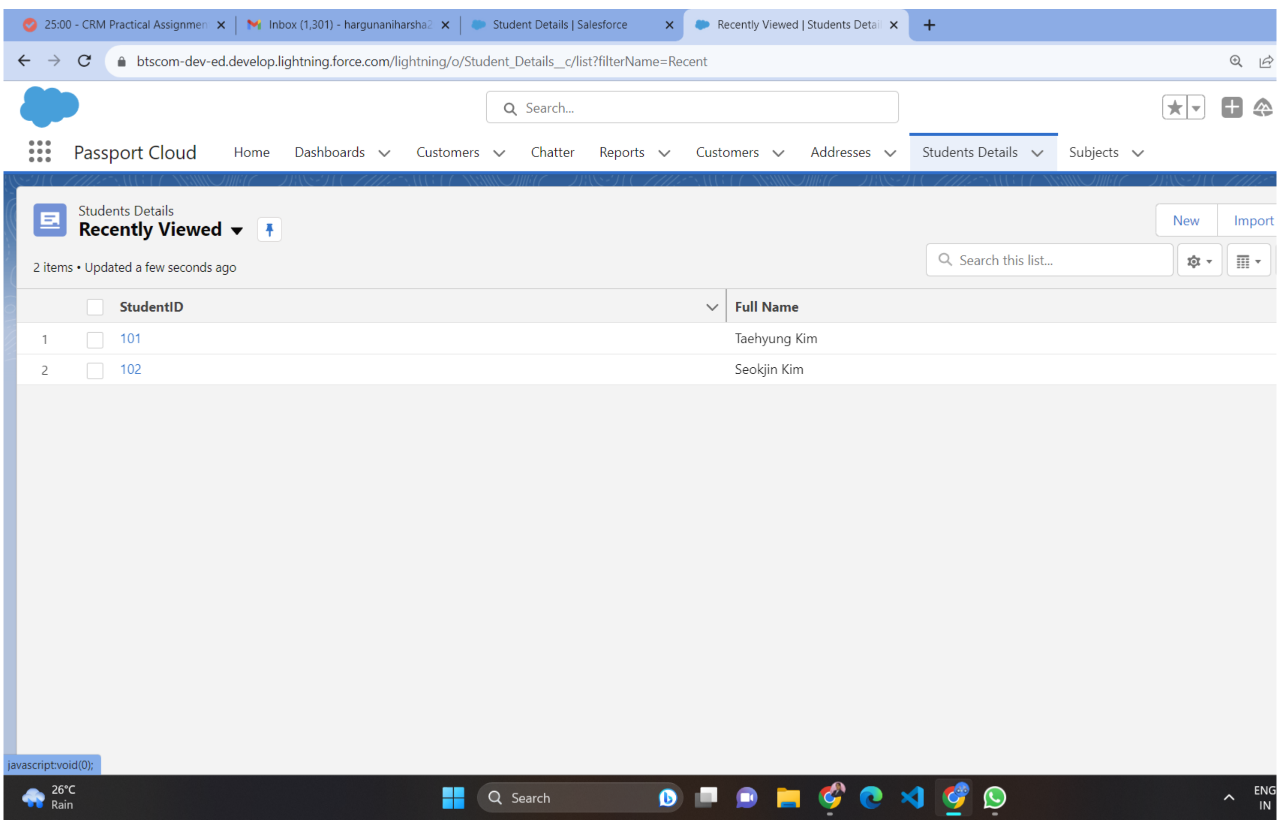


12. “When we delete a Master Record, then all the related details records get deleted. This is called “Delete Cascade.”

a) Create 2 student records and 3 subject records associated with them.




25:00 - CRM Practical Assignmen
Inbox (1,301) - hargunaniharsha2
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
Subject Name
New
Import
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
ve & New
Save
26°C
Rain
Search
ENG
IN
08:06 PM
09-09-2023


25:00 - CRM Practical Assignmen
Inbox (1,301) - hargunaniharsha2
Student Details | Salesforce
Recently Viewed | Students Detai
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
New
Import
Search this list...
2 items • Updated a few seconds ago
StudentID
Full Name
1
101
Taehyung Kim
2
102
Seokjin Kim
javascript:void(0);
26°C
Rain
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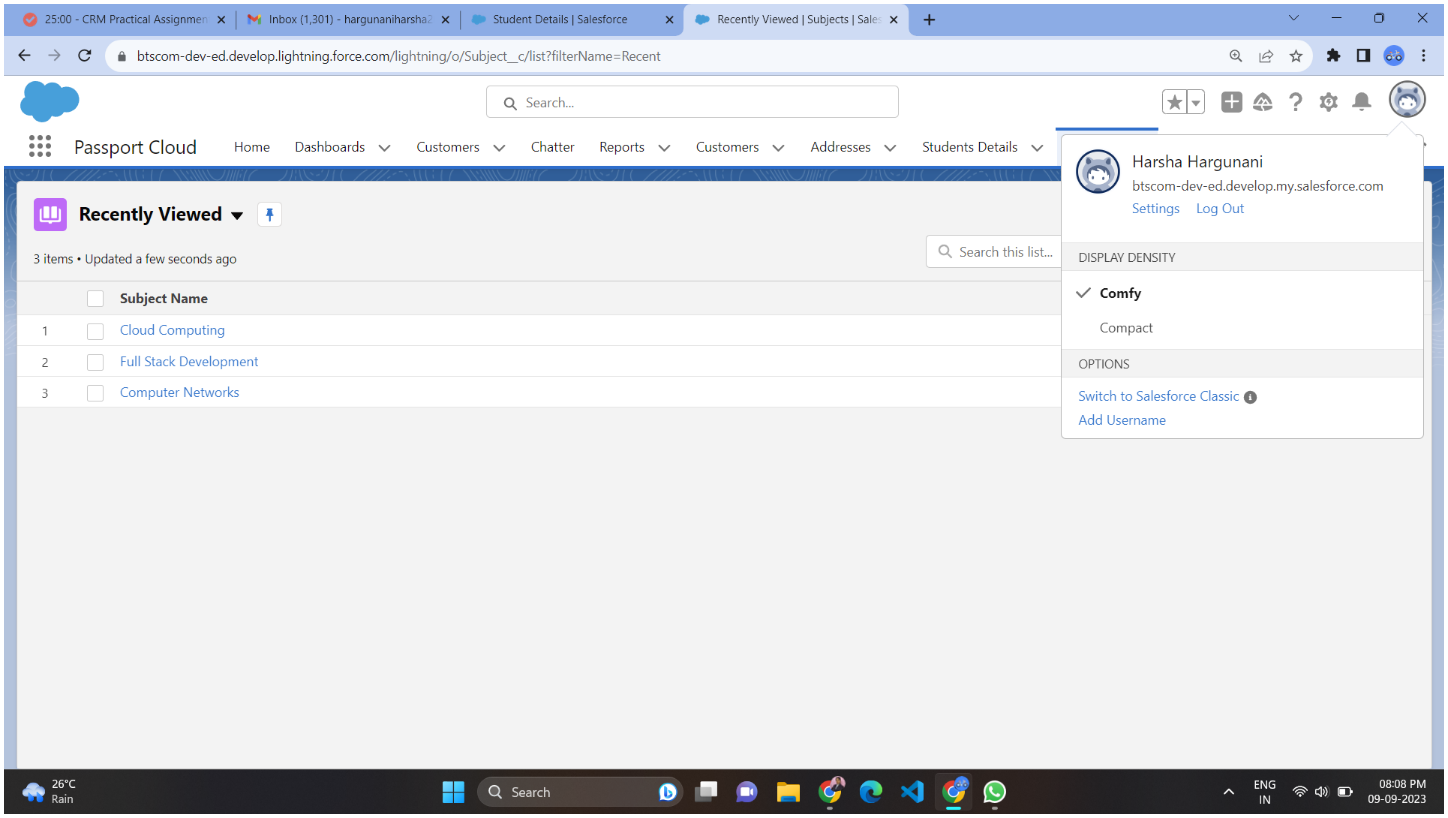
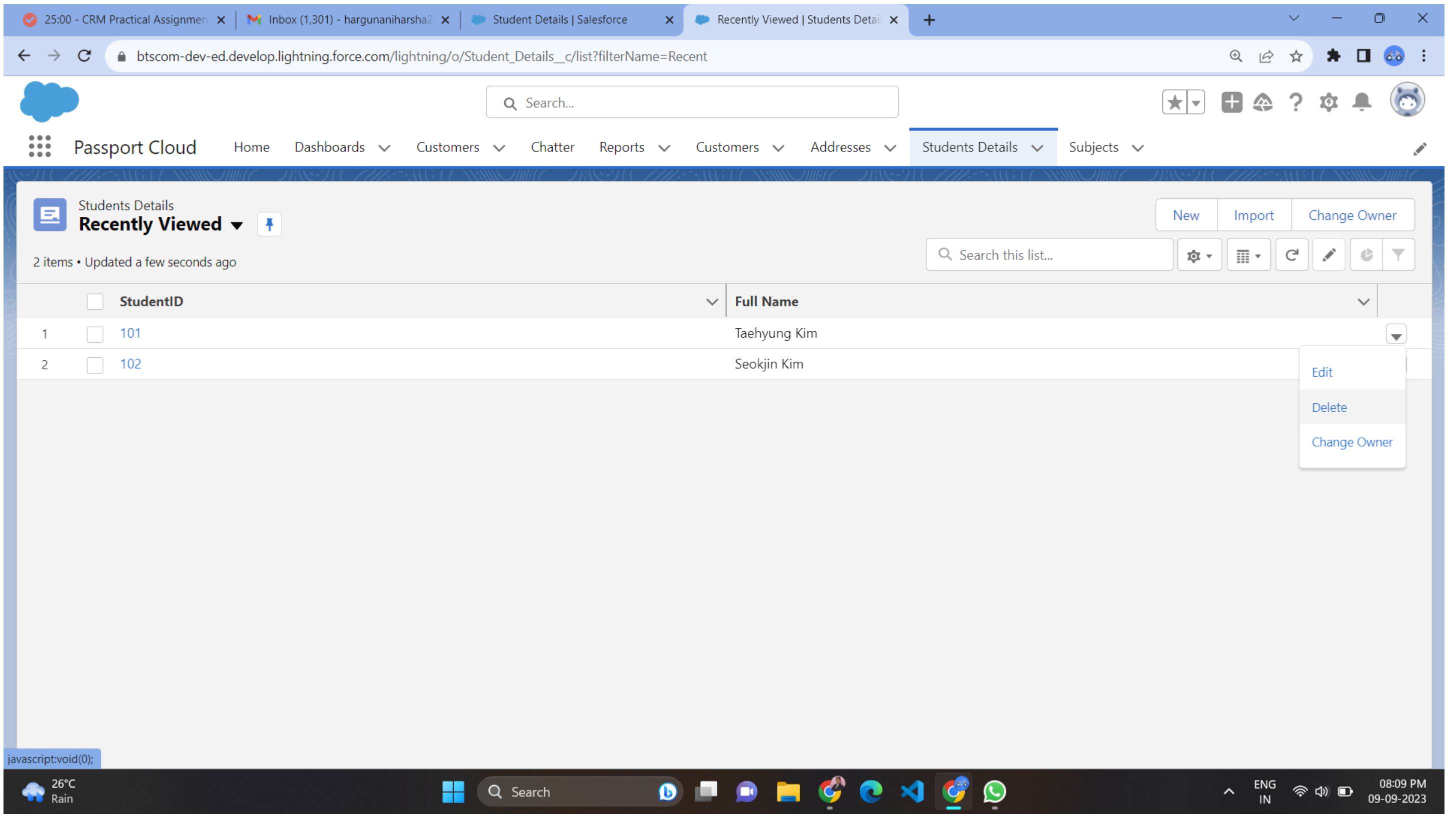
ENG
IN



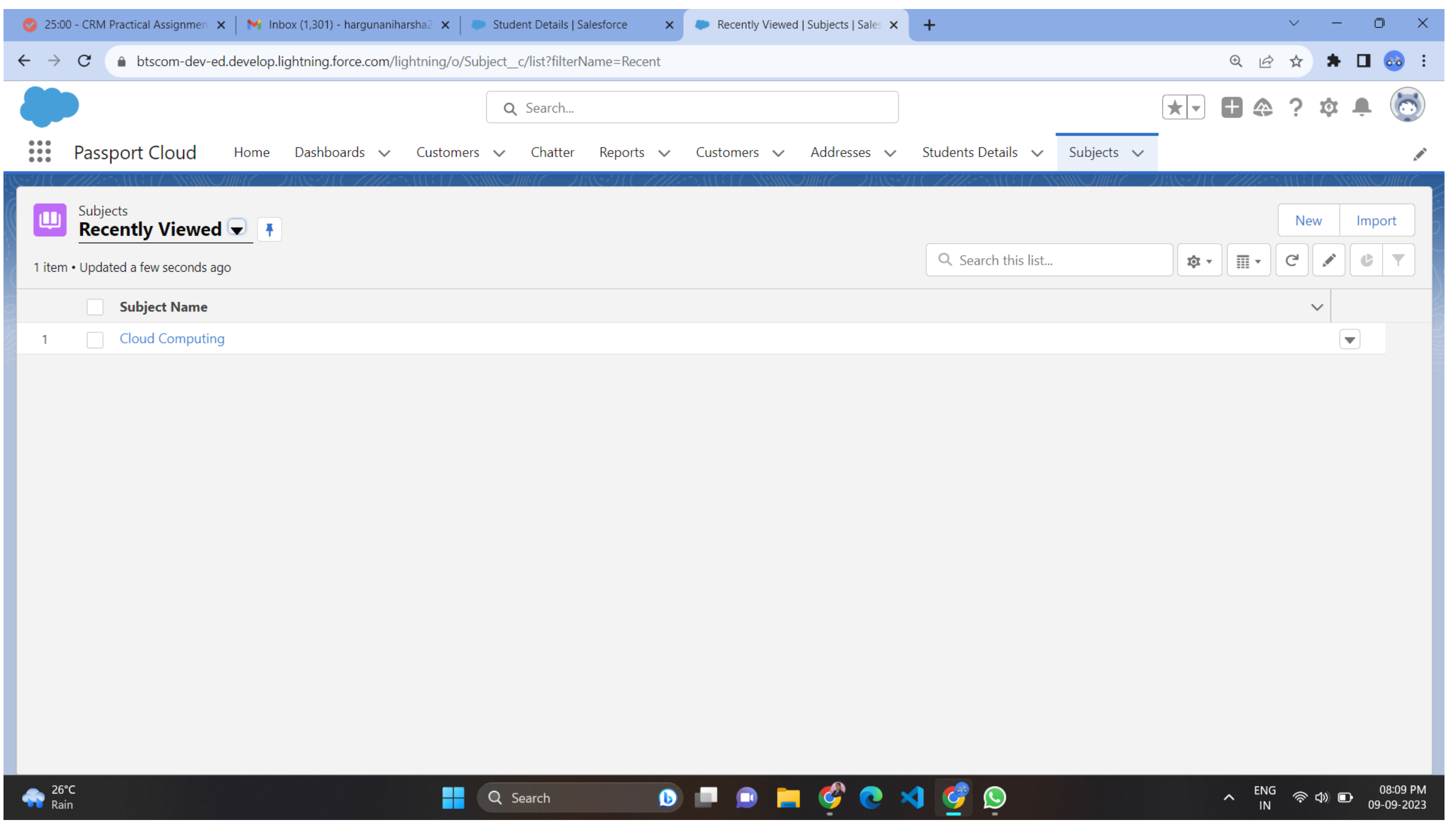
Students:
101 - Taehyung
102 - Seokjin

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

b) Delete Student record “101”.



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



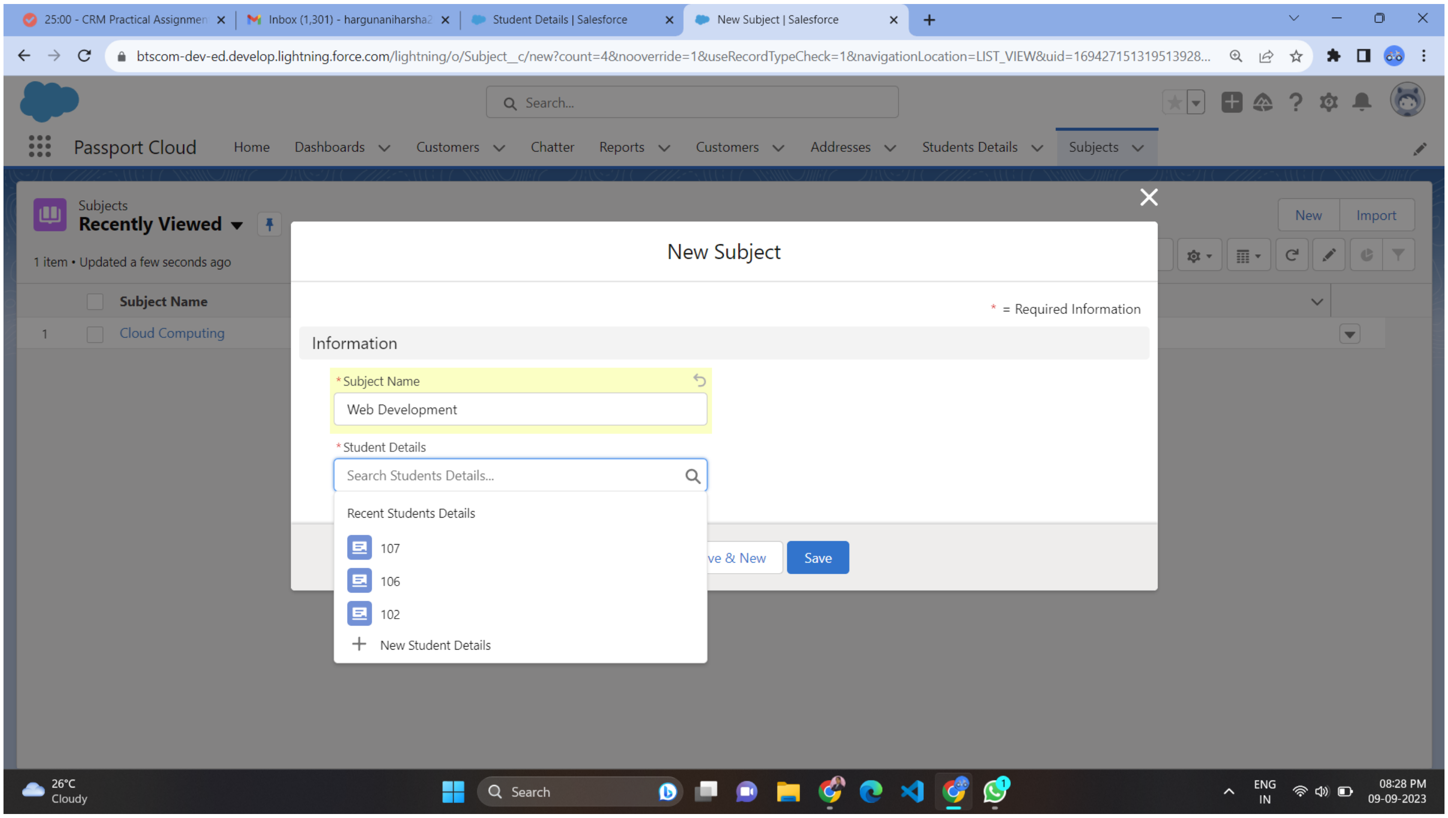
Hence verified.

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

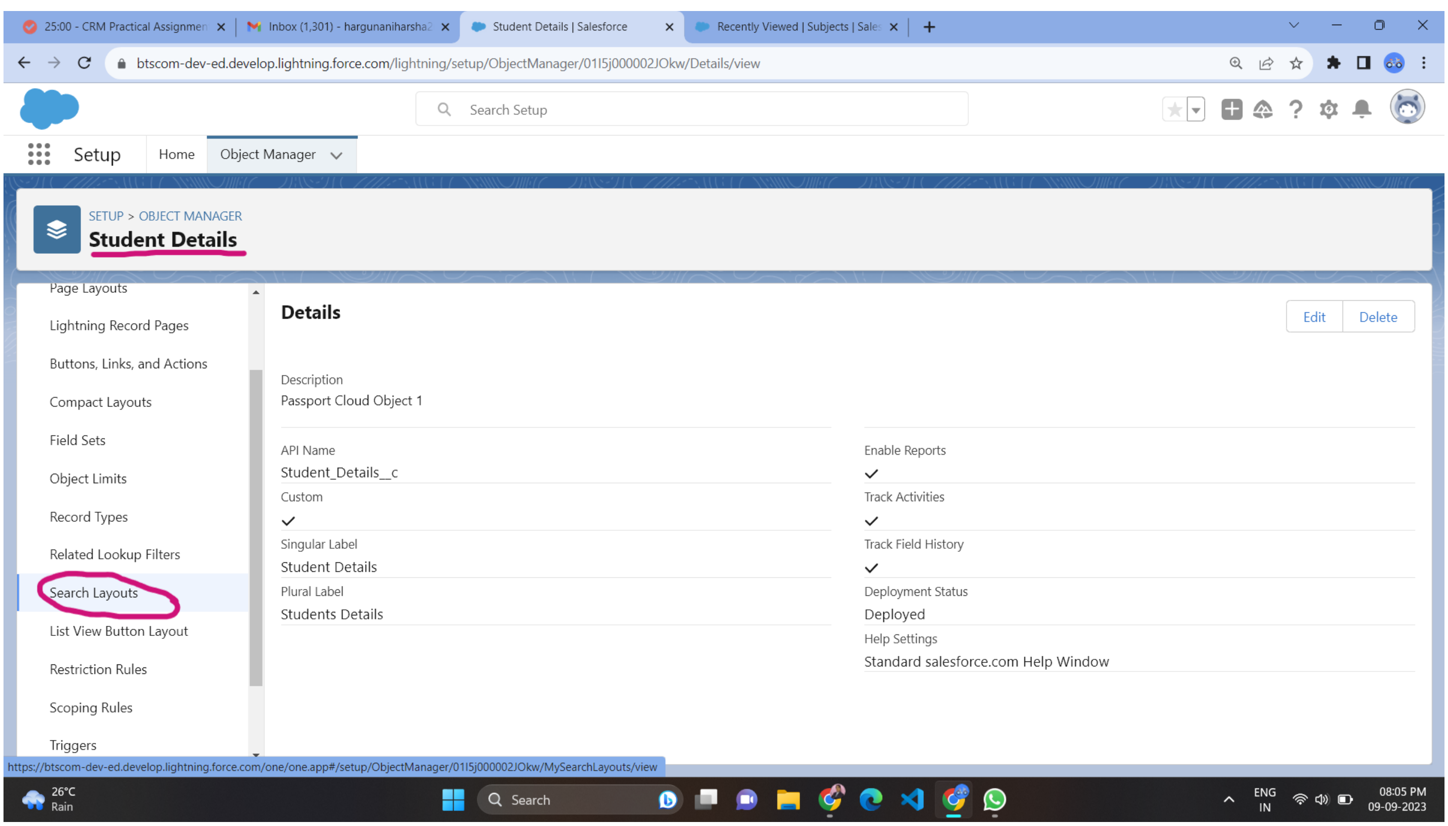
Ans. Done in the above steps.

Q3. Show “Student Name” in the Lookup dialog.

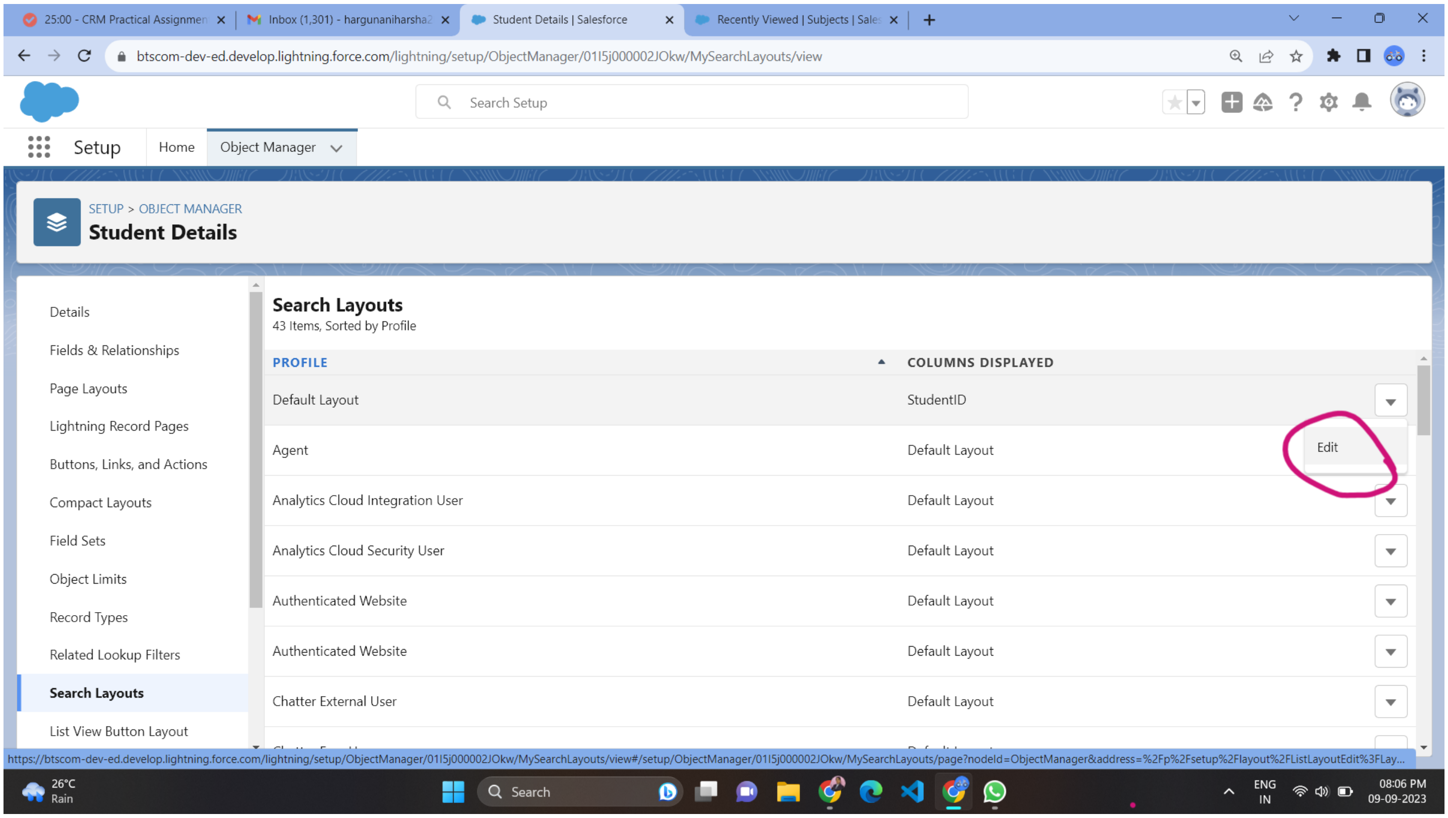
Ans. Since “Student ID” is the default field that appears in the Lookup dialog, it isn’t convenient to point out which student is it just by looking through their IDs. So we’ll add the “Full Name” field as well in the lookup dialog.



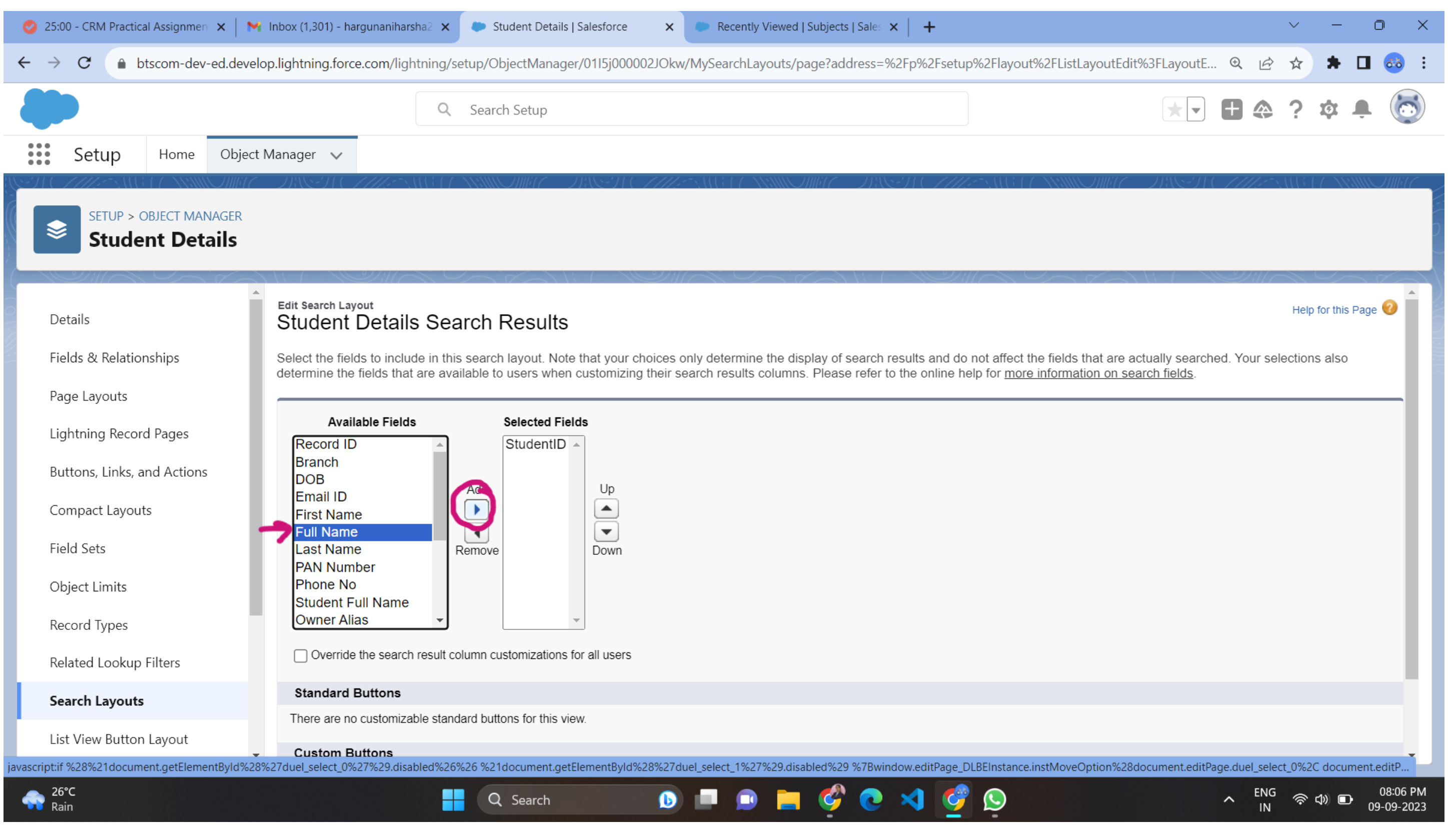
1. Navigate to Master/Parent Object - Student Detail here. Select “Search Layout”.



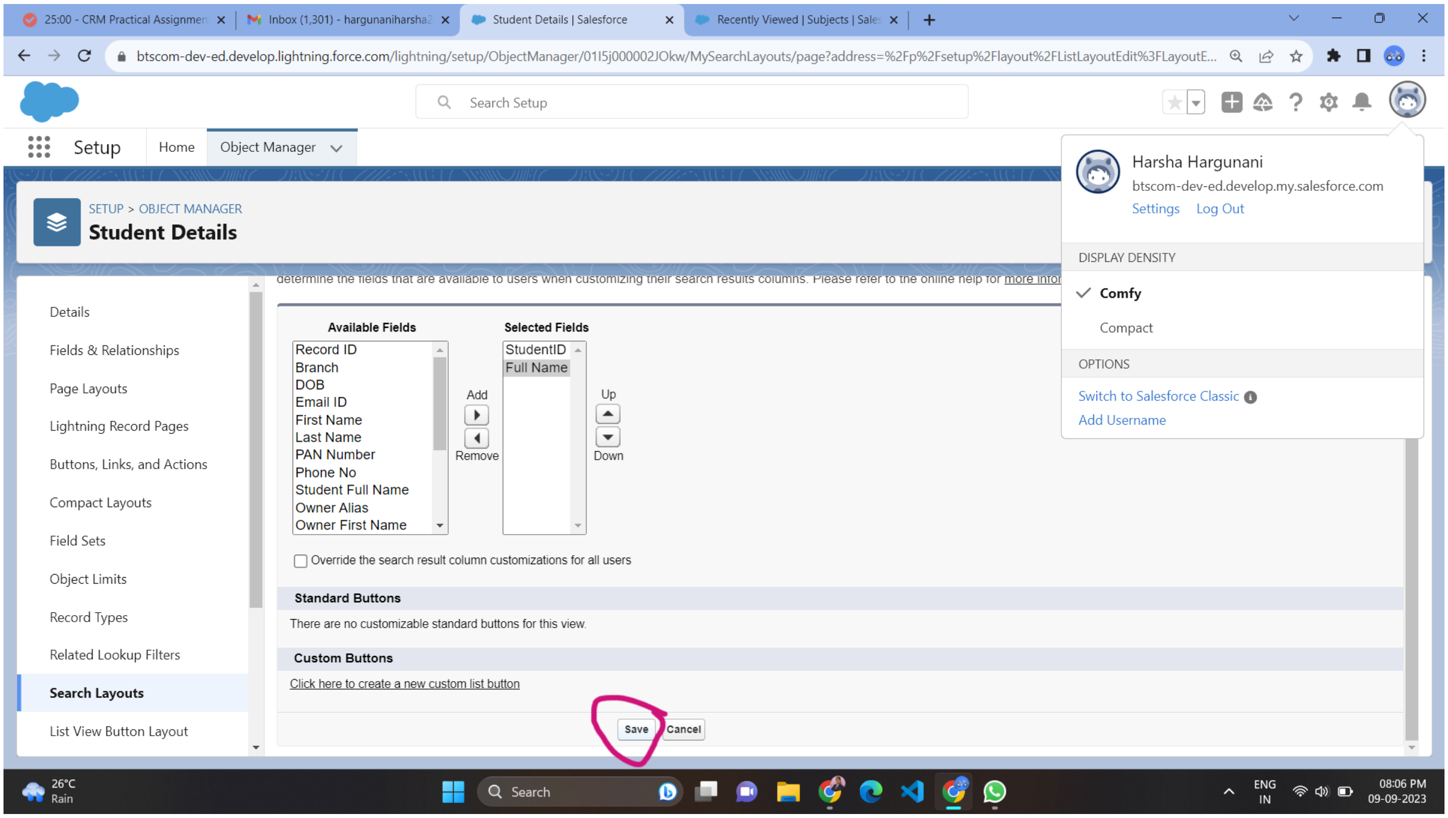
2. Click “Edit” in front of the “Default Layout”



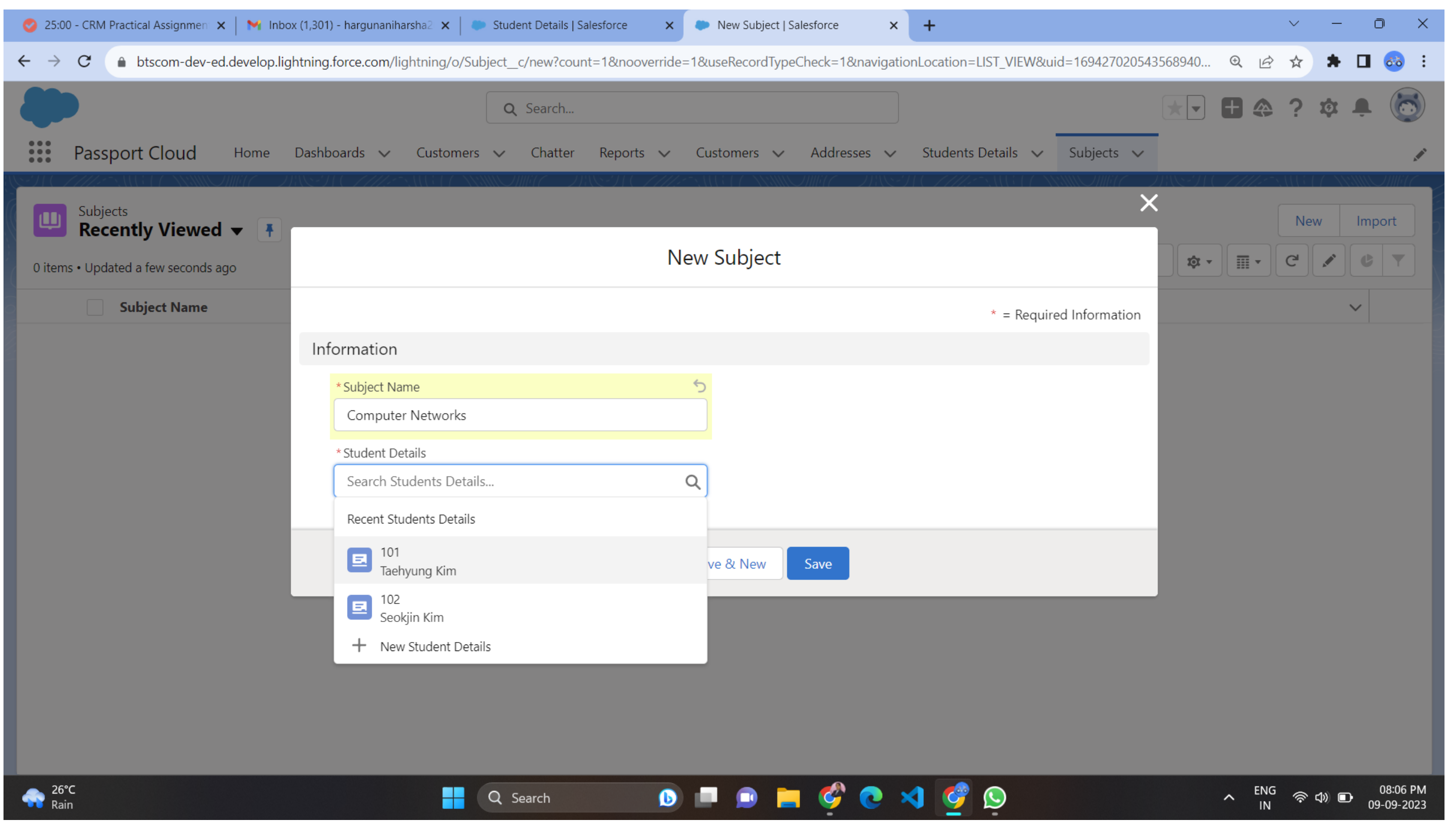
3. Select “Full Name” among the fields and then “left arrow” to insert it into the “search” column.



4. The result should look like this. Click “Save”.



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



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.

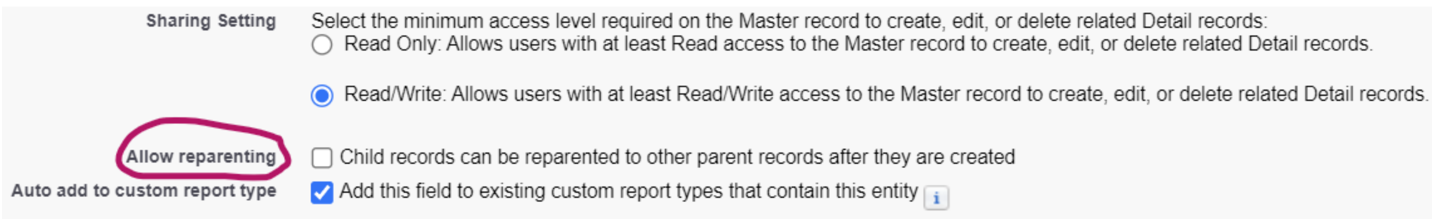
Q5. Can we convert Master-Details Relationship INTO Lookup Relationship?

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?

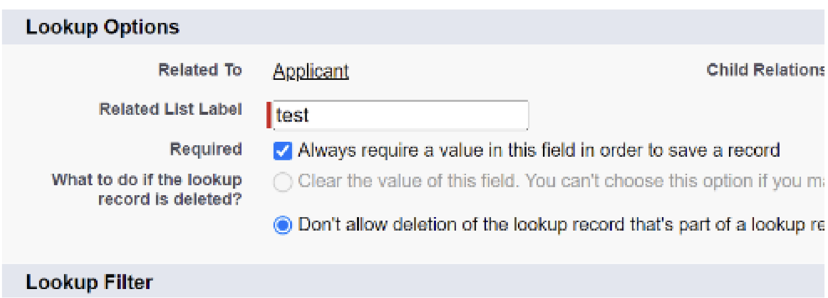
Ans. Yes, the Master selected can be adjusted if the “Allow reparenting” box is checked while building the relationship.

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



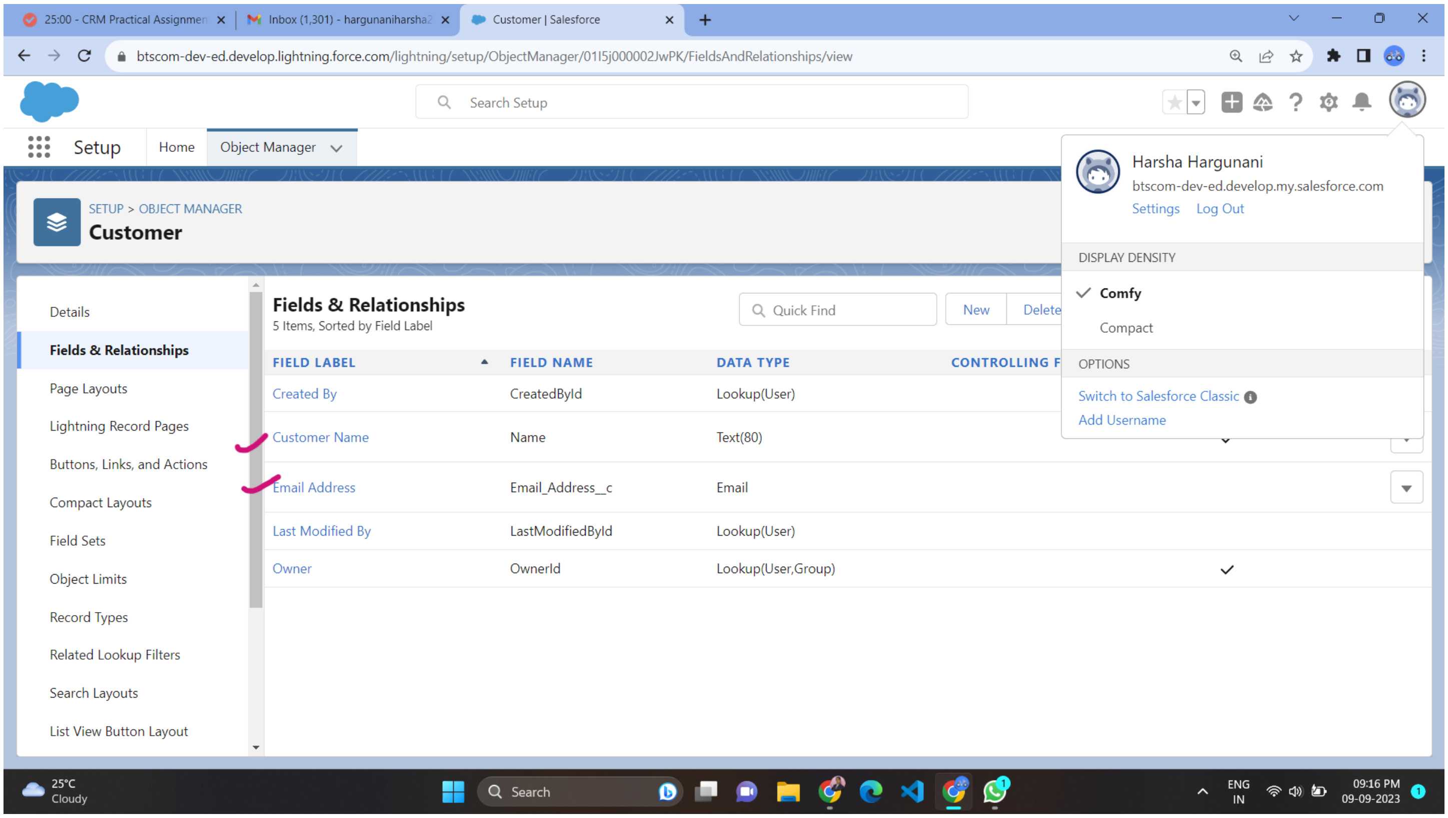
Q7. How to make Parent field compulsory in Lookup Relationship?

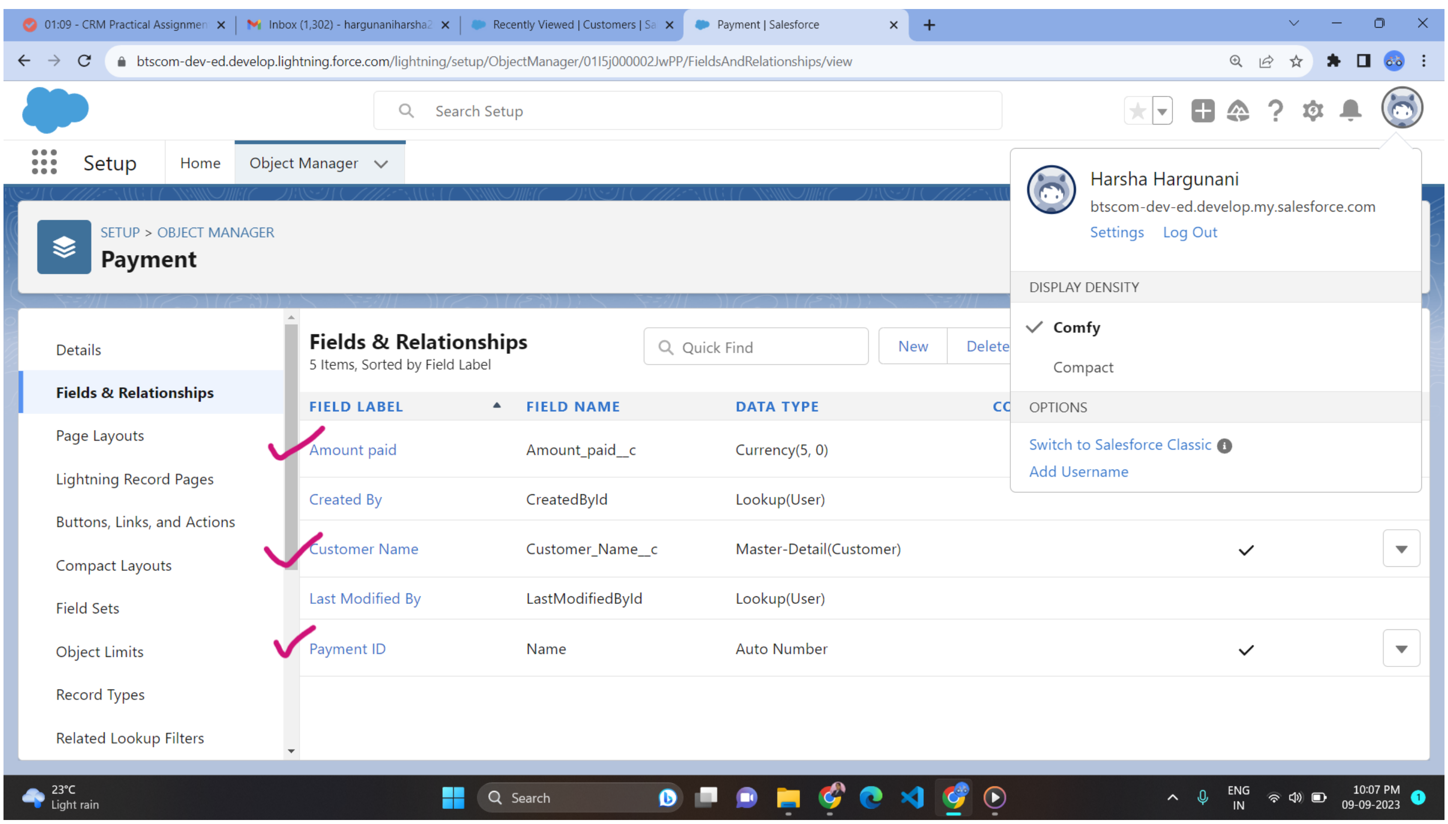
Ans.



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

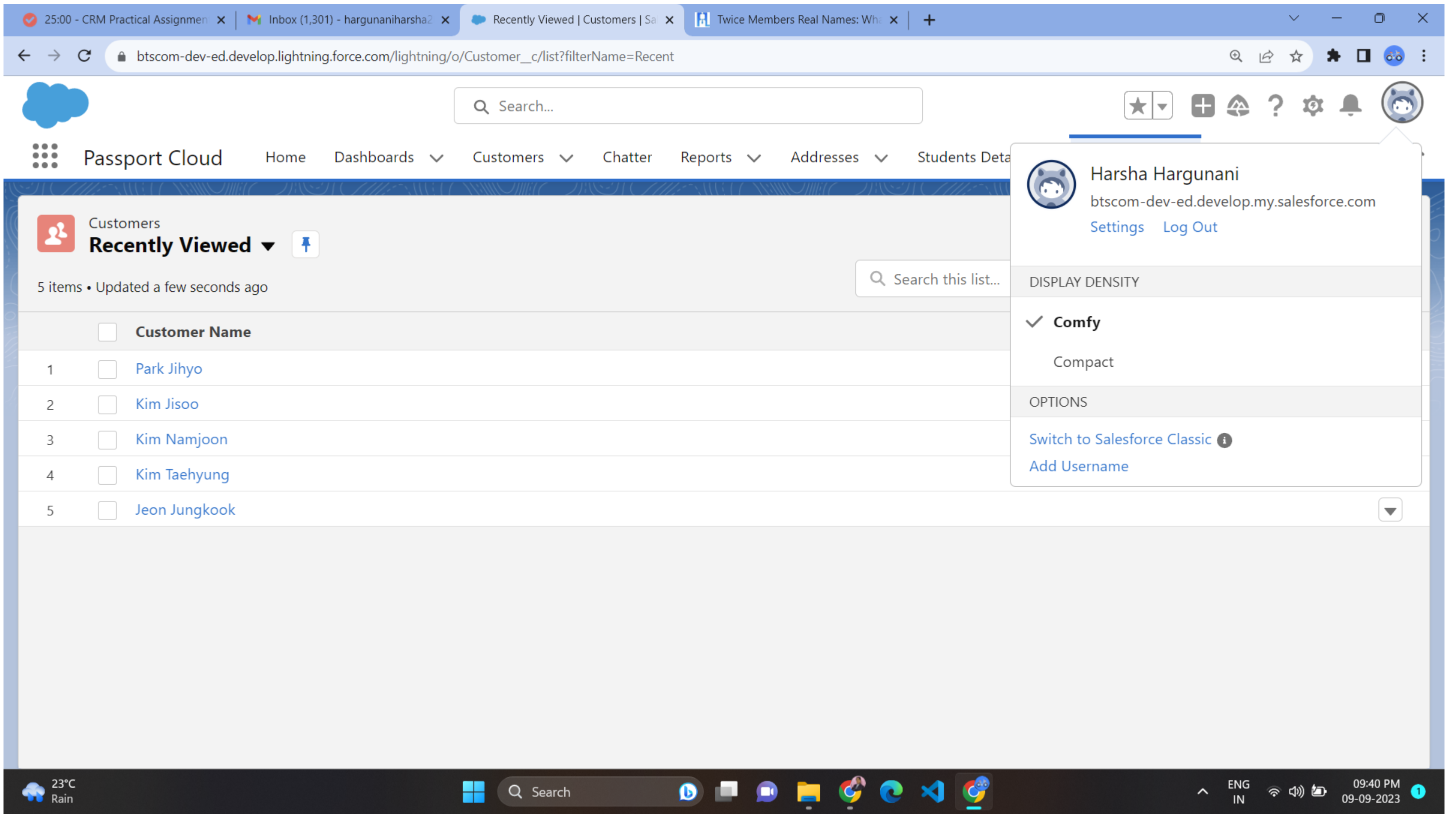
Ans. 1. Create Customer and Payment objects.

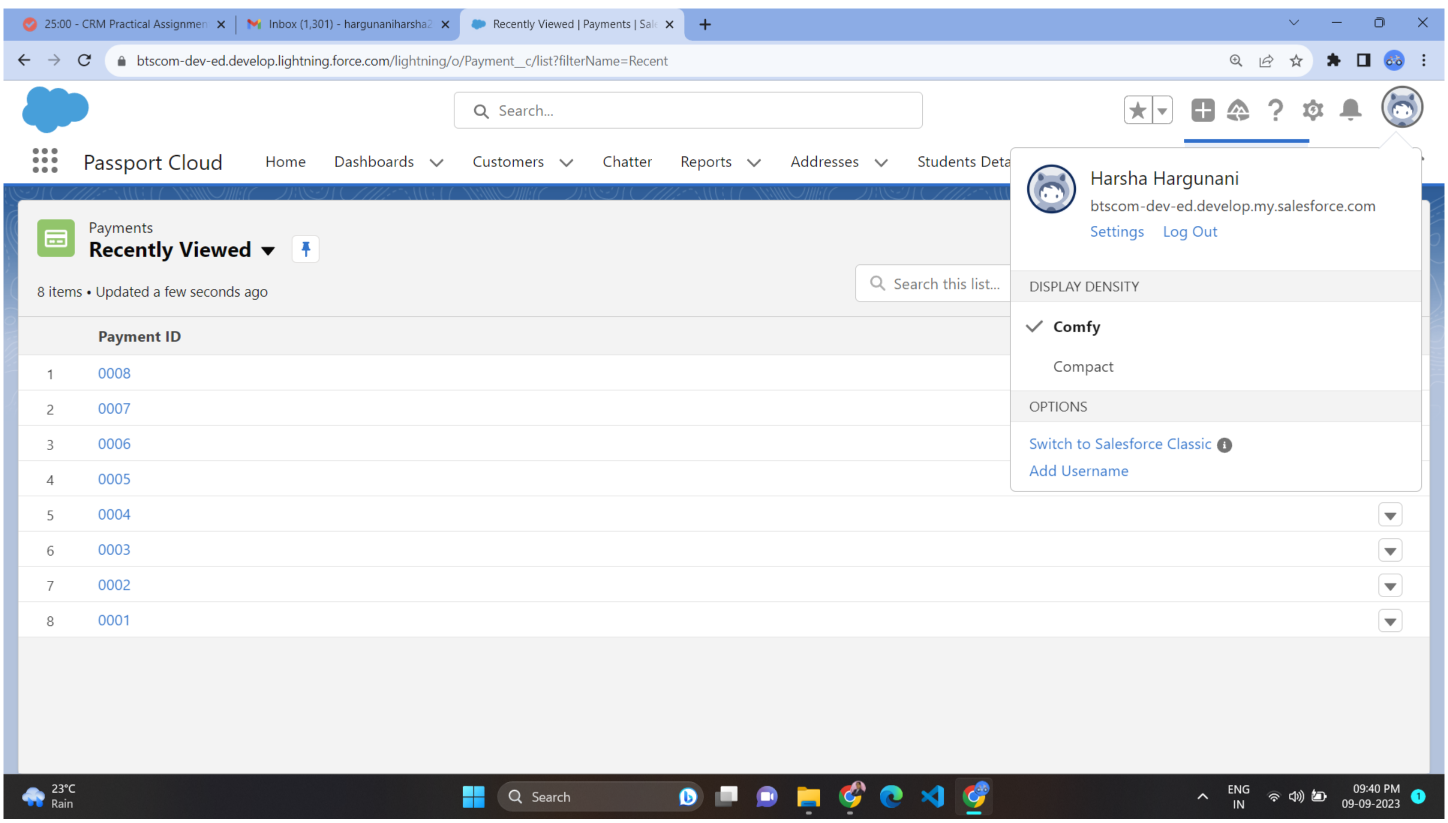




2. Apply Master-Detail relationship on “Customer Name”.

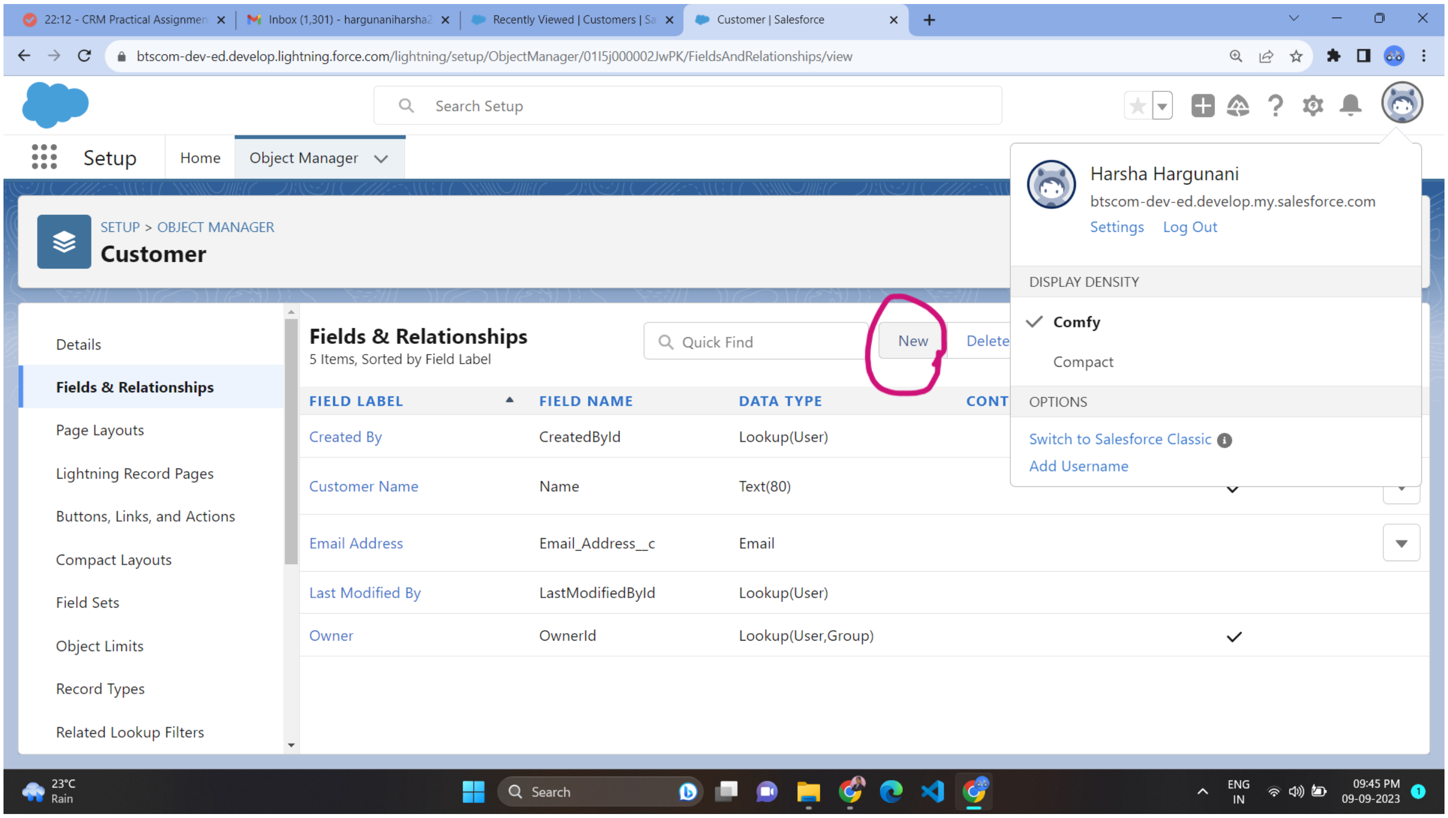
3. Add some records to both the objects.


25:00 - CRM Practical Assignmen
Inbox (1,301) - hargunaniharsha2
Recently Viewed | Customers | Sa
Twice Members Real Names: Wh
btscom-dev-ed.develop.lightning.force.com/lightning/o/Customer__c/list?filterName=Recent
Search...
Passport Cloud
Home
Dashboards
Customers
Chatter
Reports
Addresses
Students Deta
Customers
Recently Viewed
5 items • Updated a few seconds ago
Search this list...
Customer Name
1 Park Jihyo
2 Kim Jisoo
3 Kim Namjoon
4 Kim Taehyung
5 Jeon Jungkook
Harsha Hargunani
btscom-dev-ed.develop.my.salesforce.com
Settings
Log Out
DISPLAY DENSITY
Comfy
Compact
OPTIONS
Switch to Salesforce Classic
Add Username
23°C
Rain
Search
ENG
IN
09:40 PM
09-09-2023

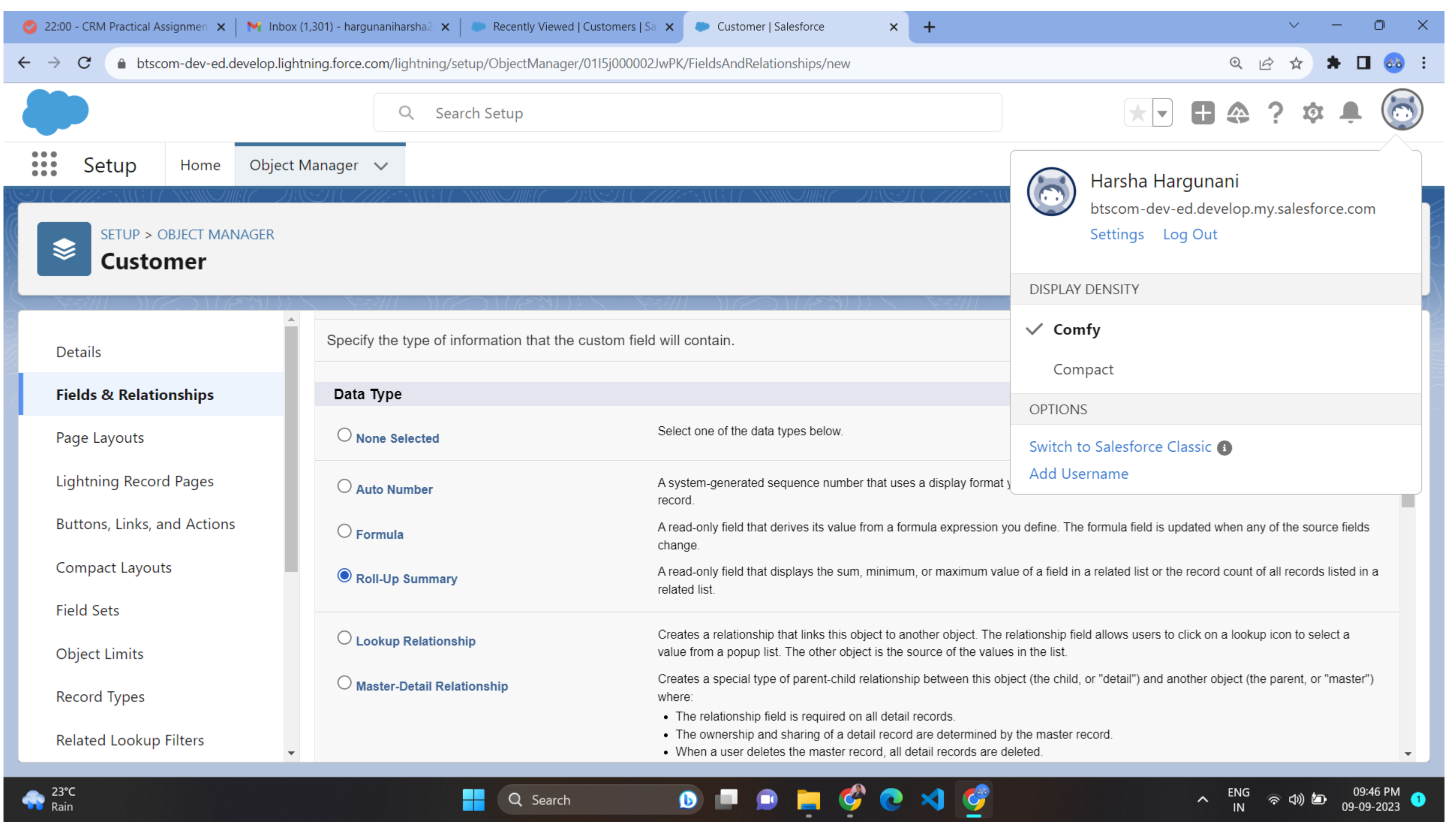

25:00 - CRM Practical Assignmen
Inbox (1,301) - hargunaniharsha2
Recently Viewed | Payments | Sal
btscom-dev-ed.develop.lightning.force.com/lightning/o/Payment__c/list?filterName=Recent
Search...
Passport Cloud
Home
Dashboards
Customers
Chatter
Reports
Addresses
Students Deta
Payments
Recently Viewed
8 items • Updated a few seconds ago
Search this list...
Payment ID
1 0008
2 0007
3 0006
4 0005
5 0004
6 0003
7 0002
8 0001
Harsha Hargunani
btscom-dev-ed.develop.my.salesforce.com
Settings
Log Out
DISPLAY DENSITY
Comfy
Compact
OPTIONS
Switch to Salesforce Classic
Add Username
23°C
Rain
Search
ENG
IN
09:40 PM
09-09-2023

Q9. Create Rollup Summary Field.

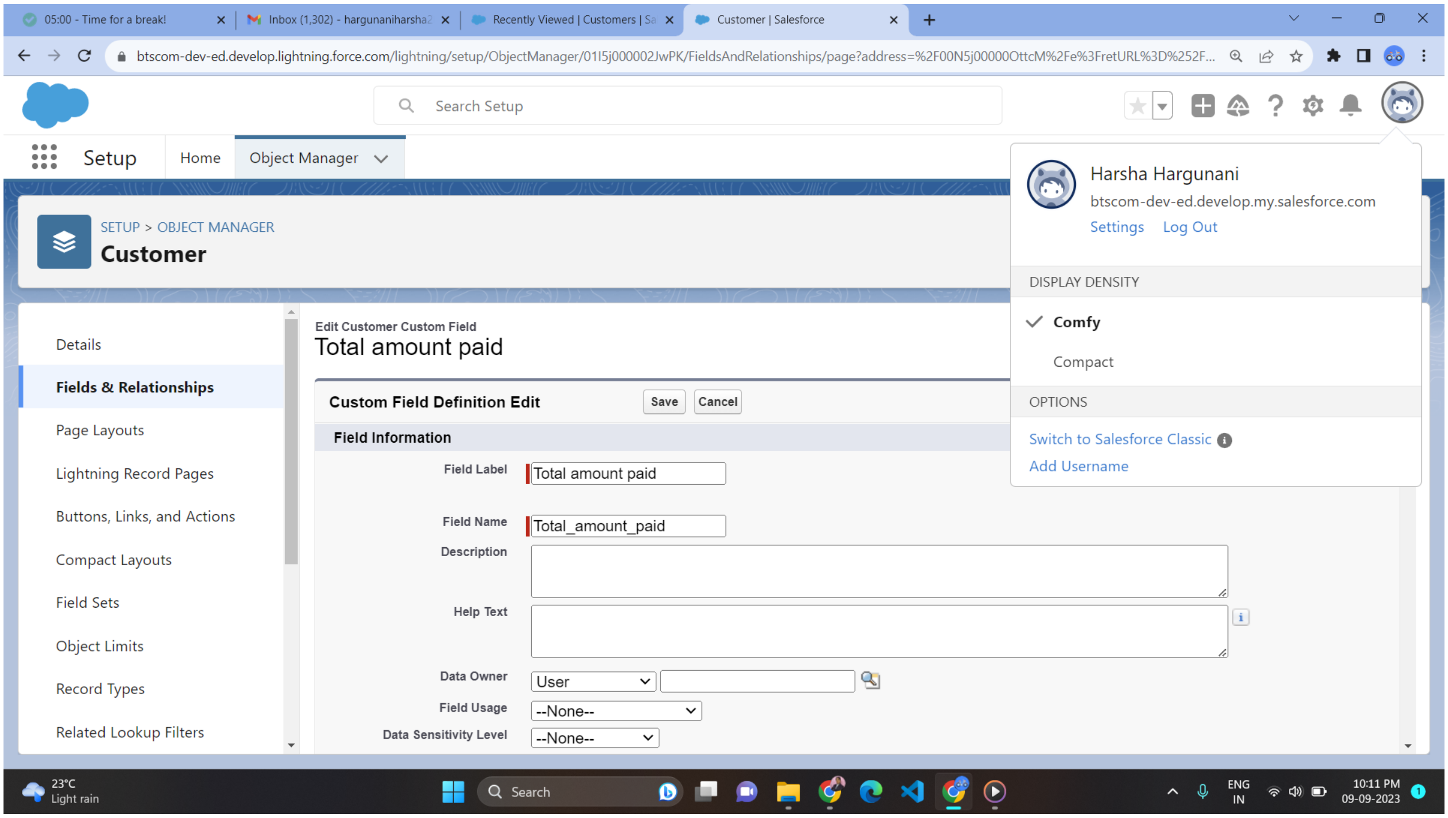
Ans. 1. Create a new field on the Master/Parent side. Click “New”.



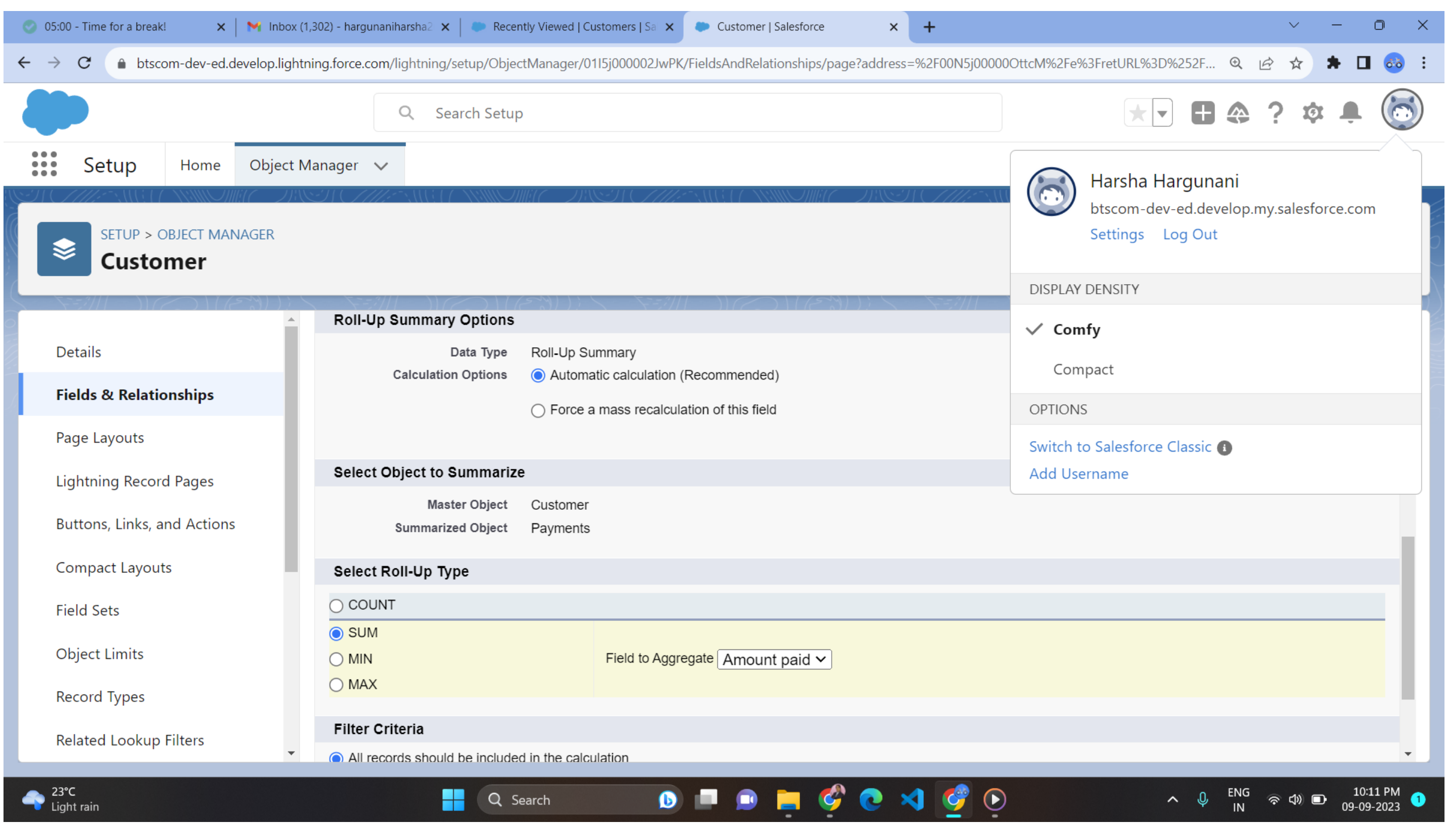
2. Select field types as “Roll-up Summary”.



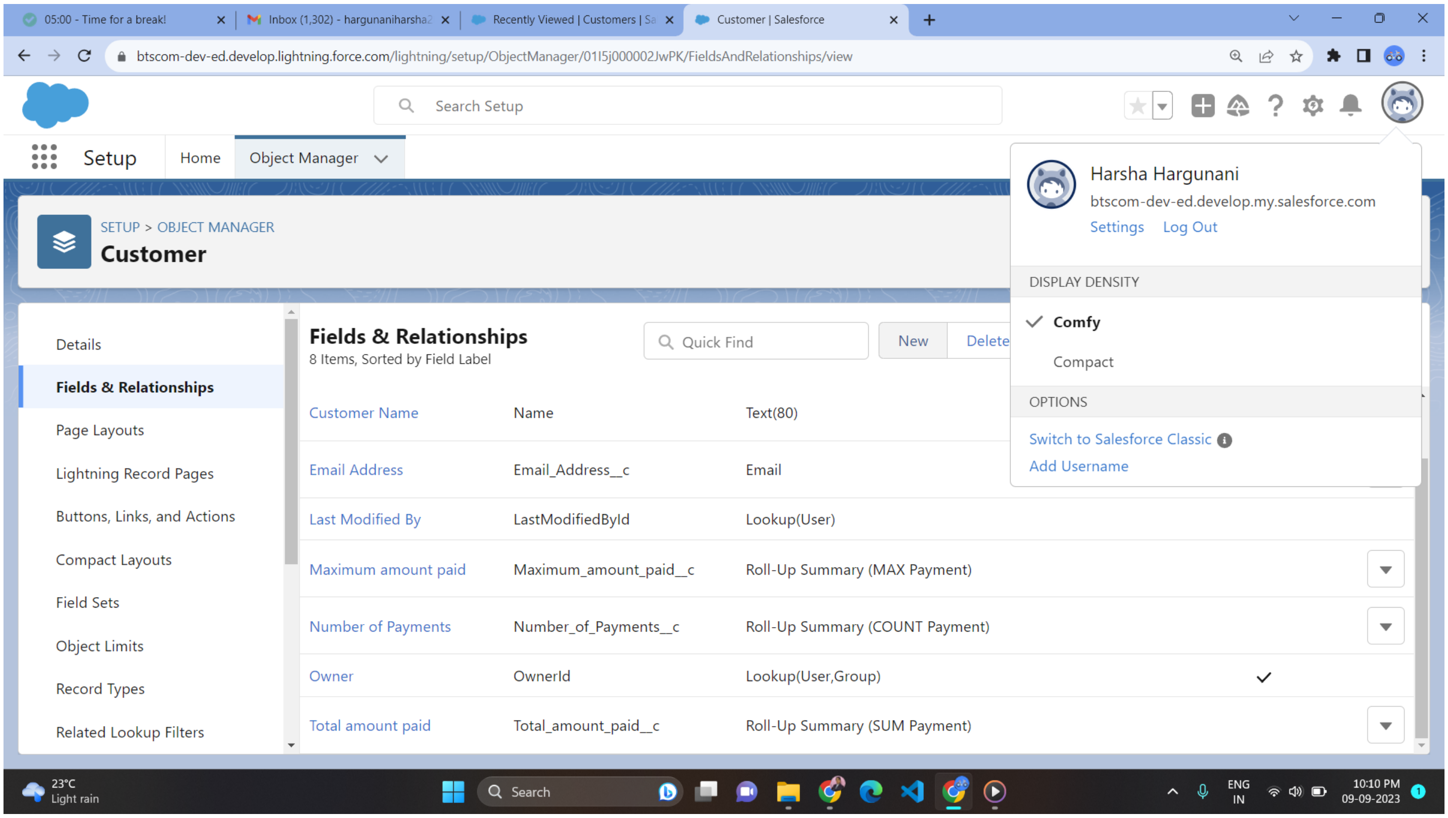
3. Enter field label.



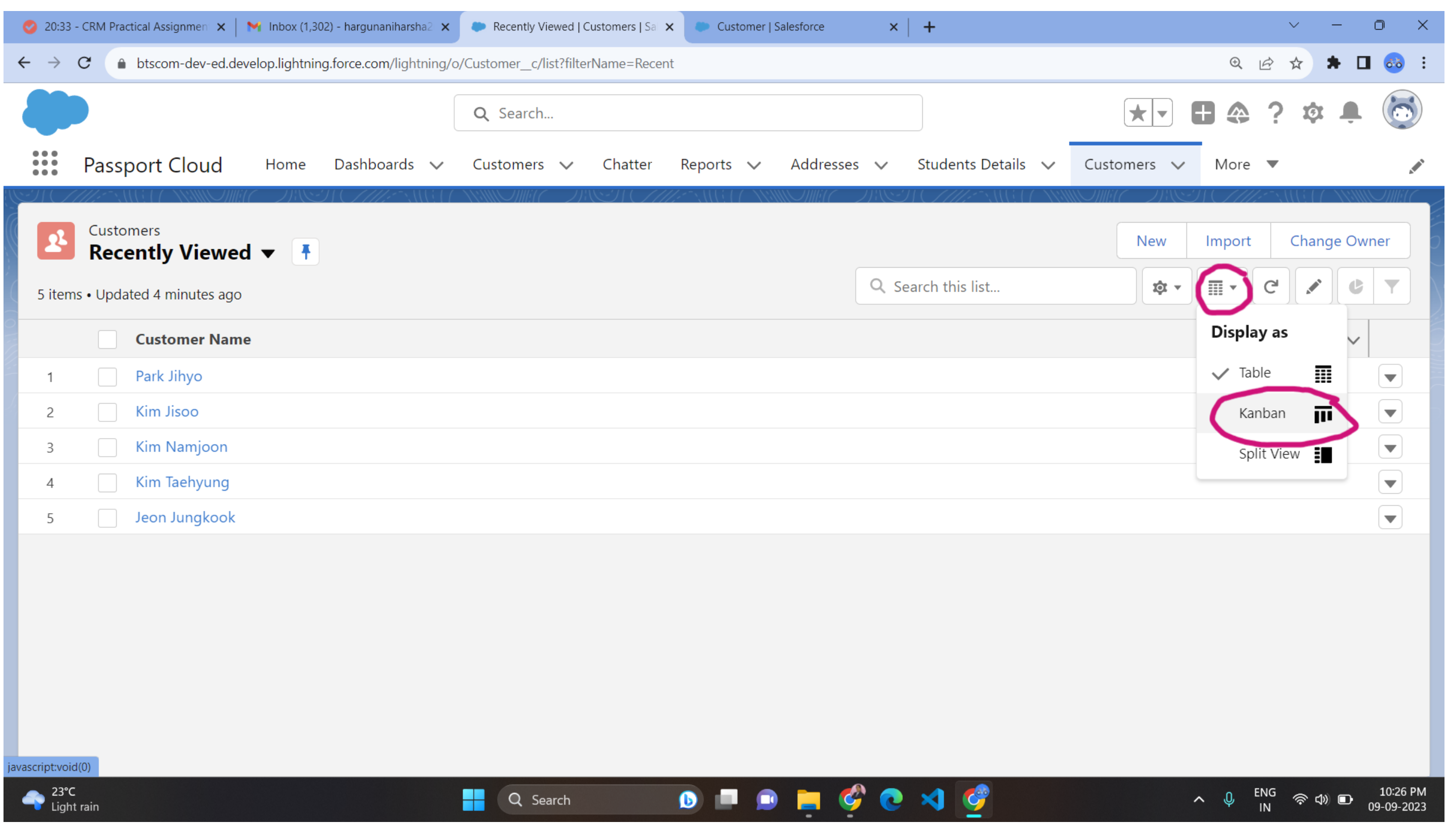
4. Select aggregate type, here “SUM” to display total amount paid by all the customers.



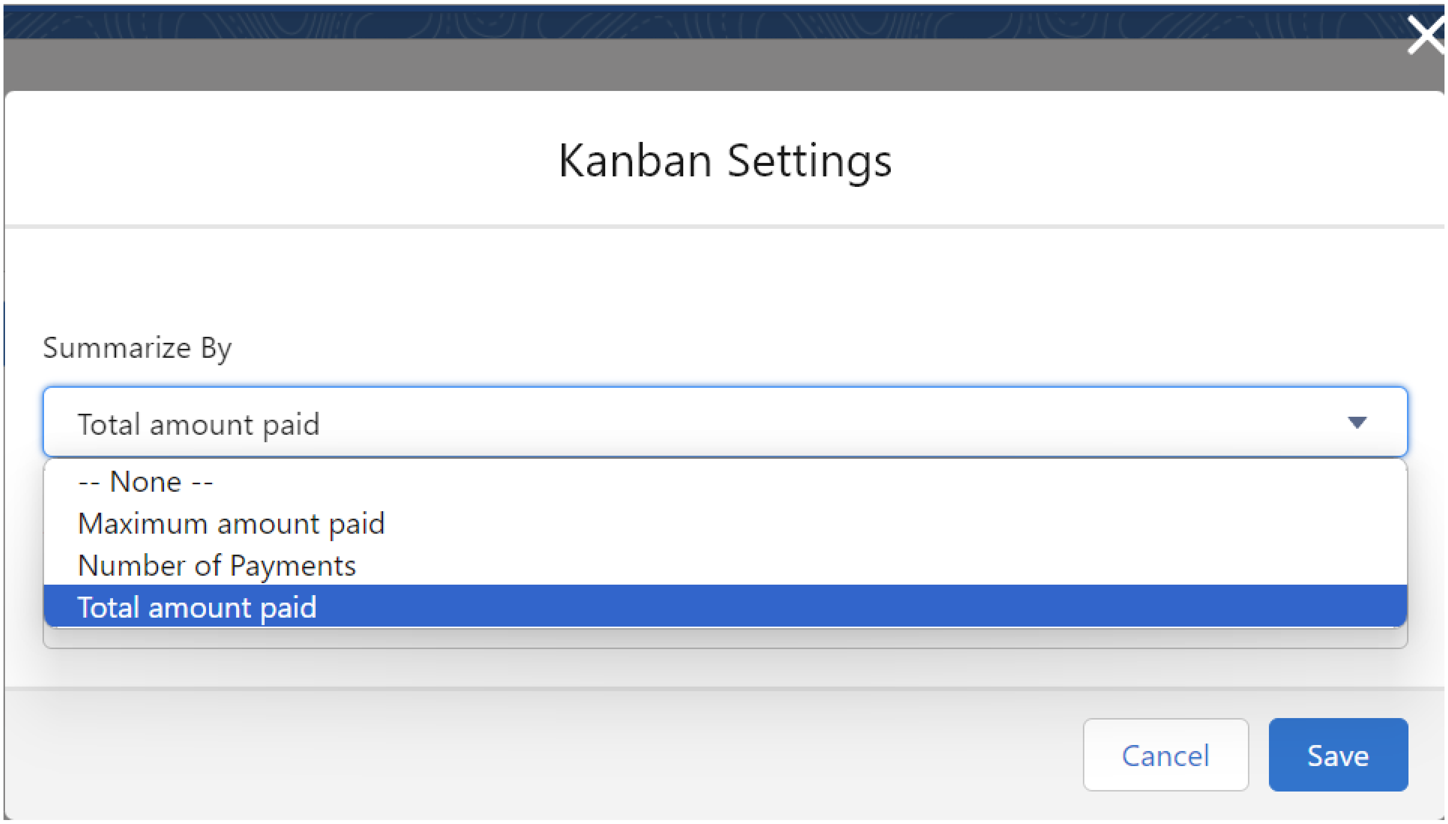
5. Similarly create for “COUNT” - Number of payments and “MAX” - Maximum amount paid.



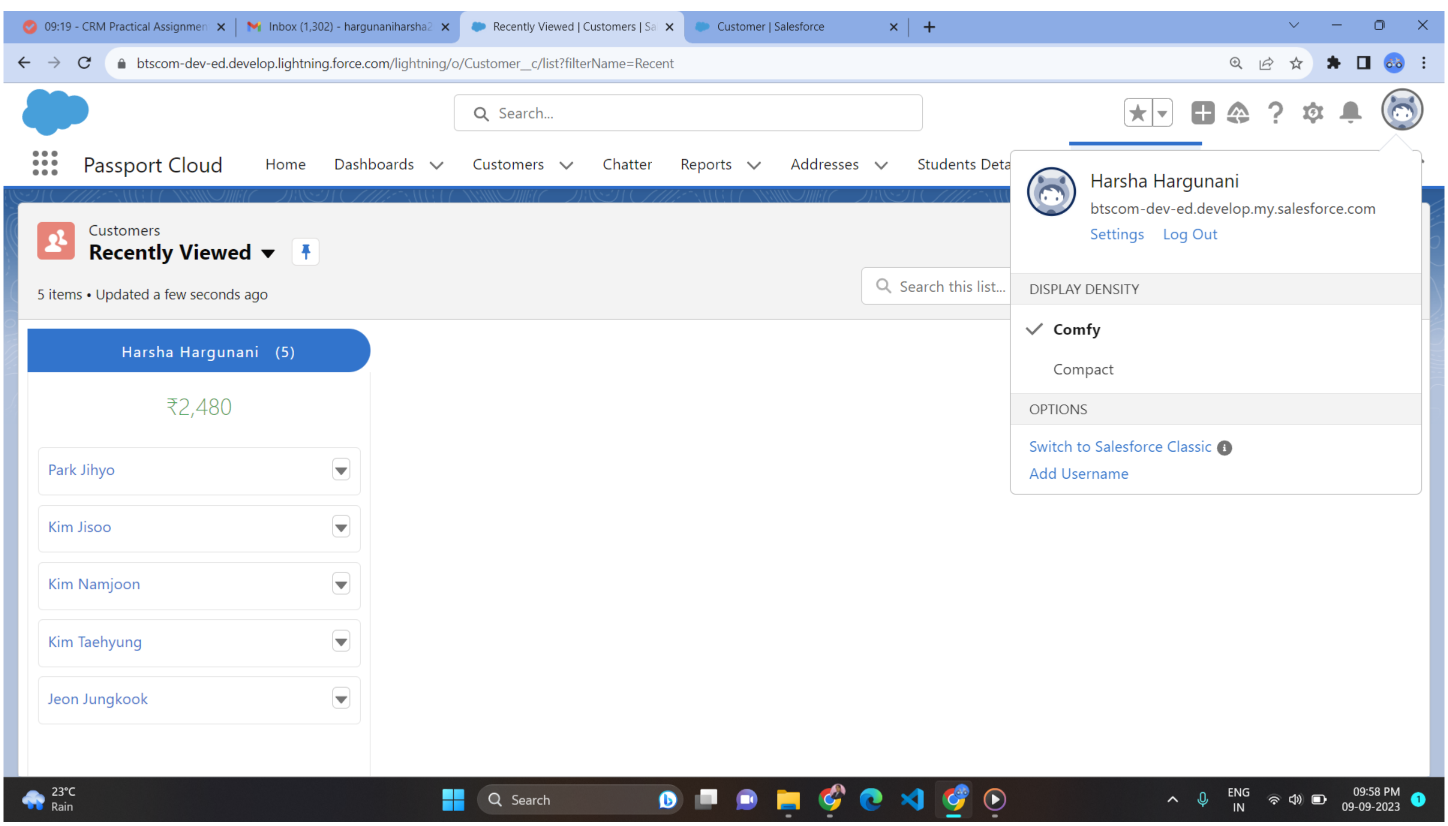
6. Navigate to “App” and change display settings to “Kanban” view.



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

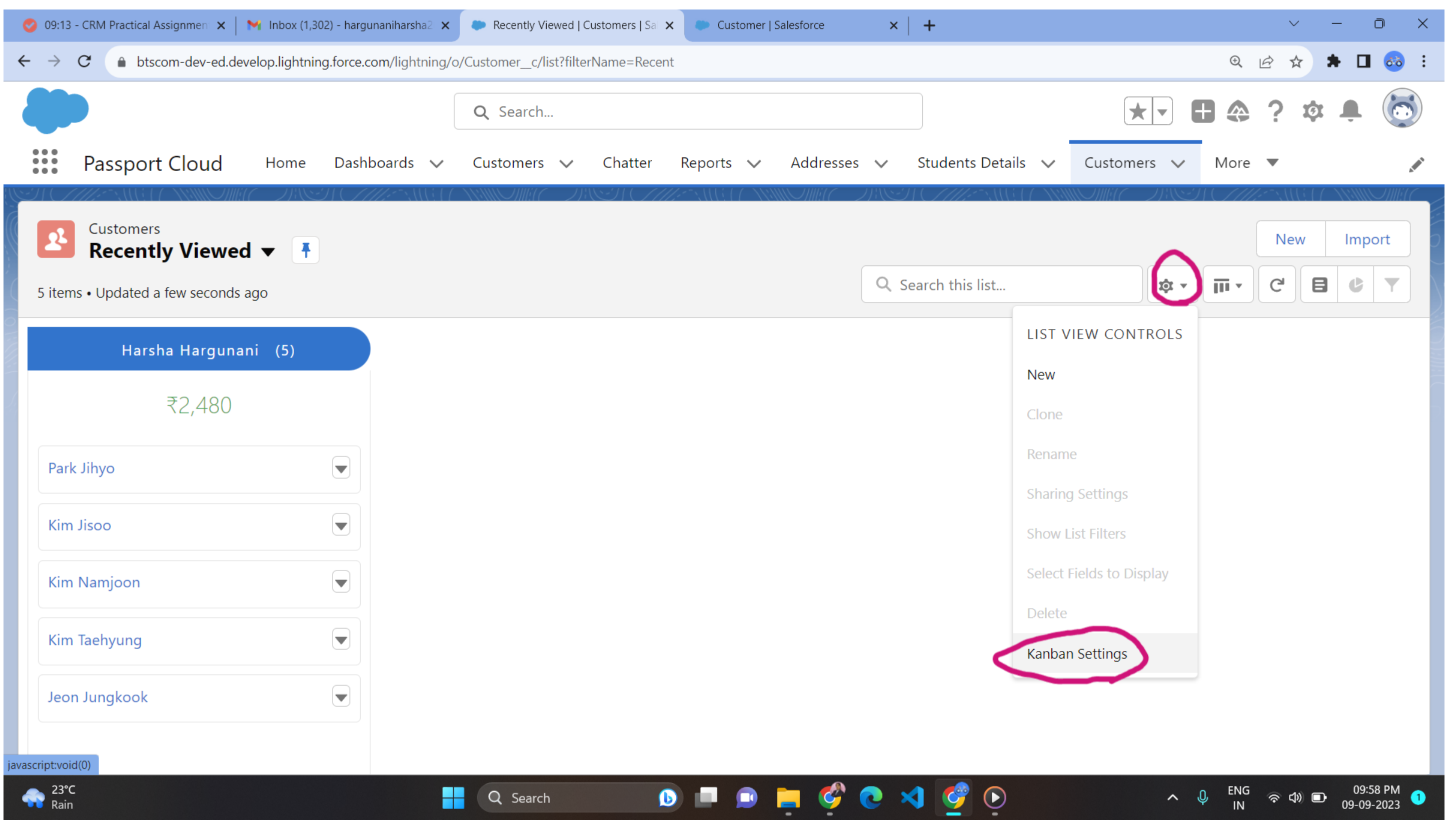


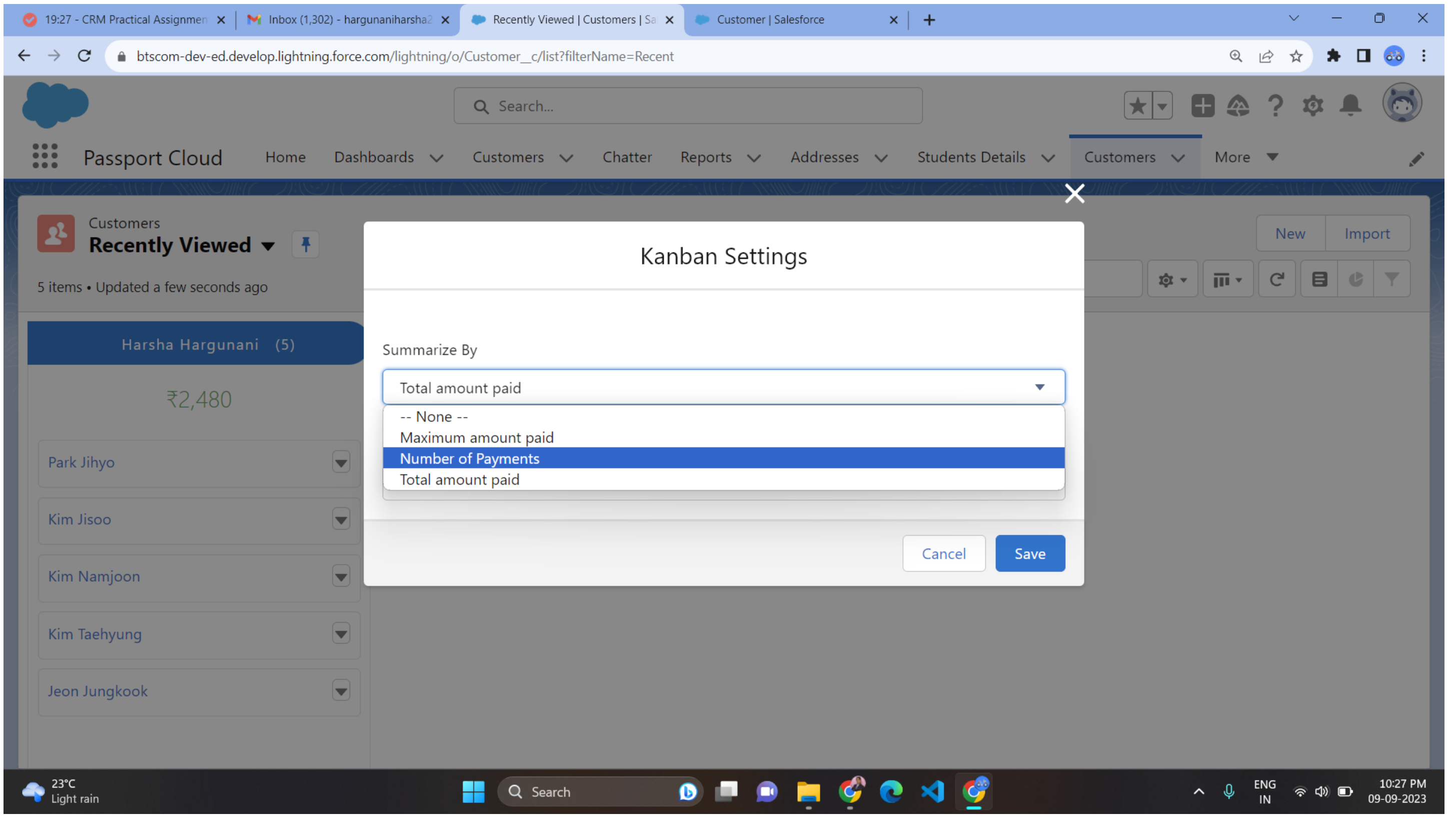
8. Hence we can see, Total amount paid of all the customers is Rs.2480



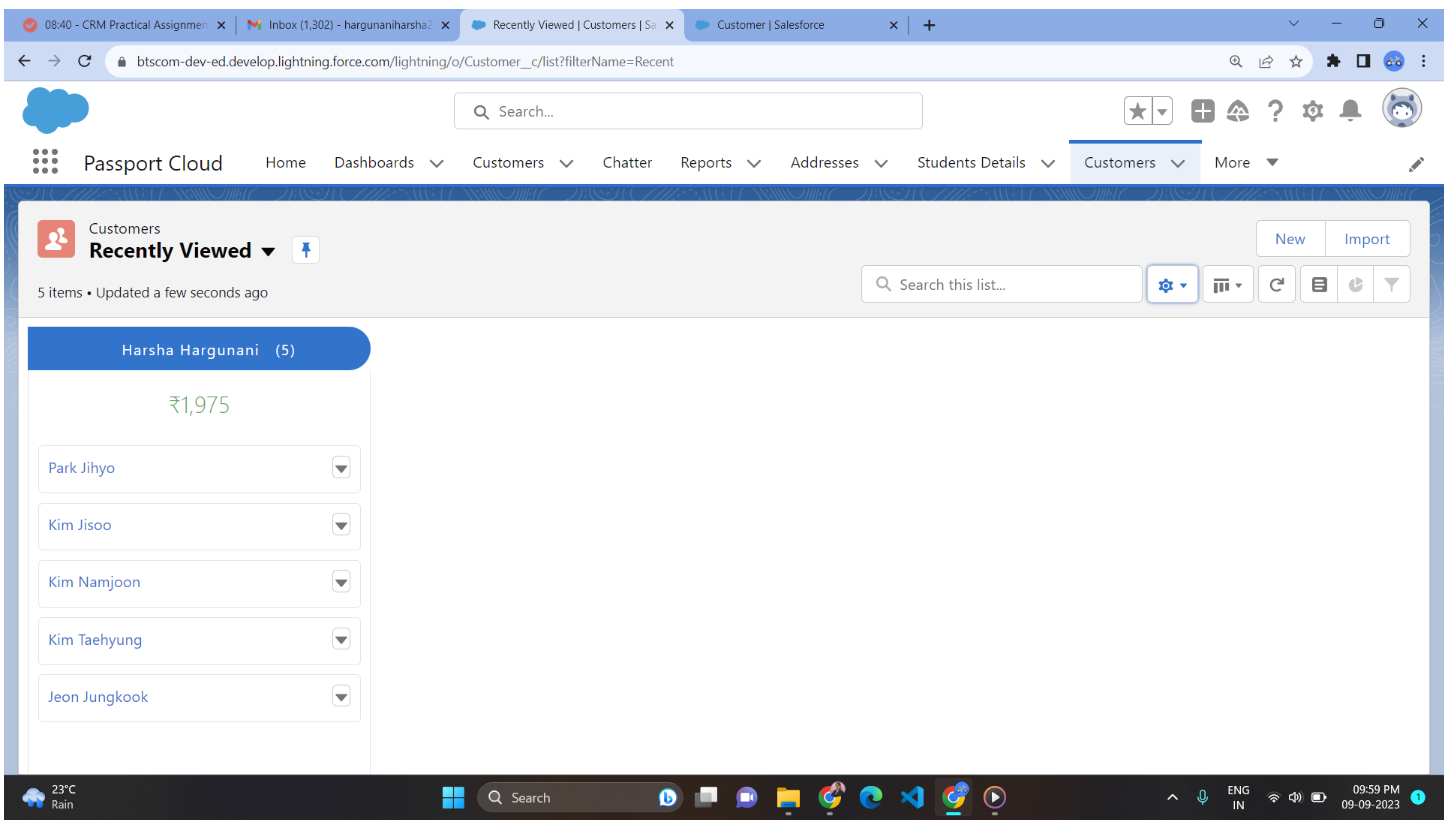
Payment ID	Customer Name	Amount Paid
0001	Park Jihyo	100
0002	Kim Namjoon	250
0003	Jeon Jungkook	500
0004	Park Jihyo	180
0005	Kim Taehyung	600
0006	Kim Namjoon	225
0007	Kim Jisoo	345
0008	Park Jihyo	280
Total	**All**	**2480**

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



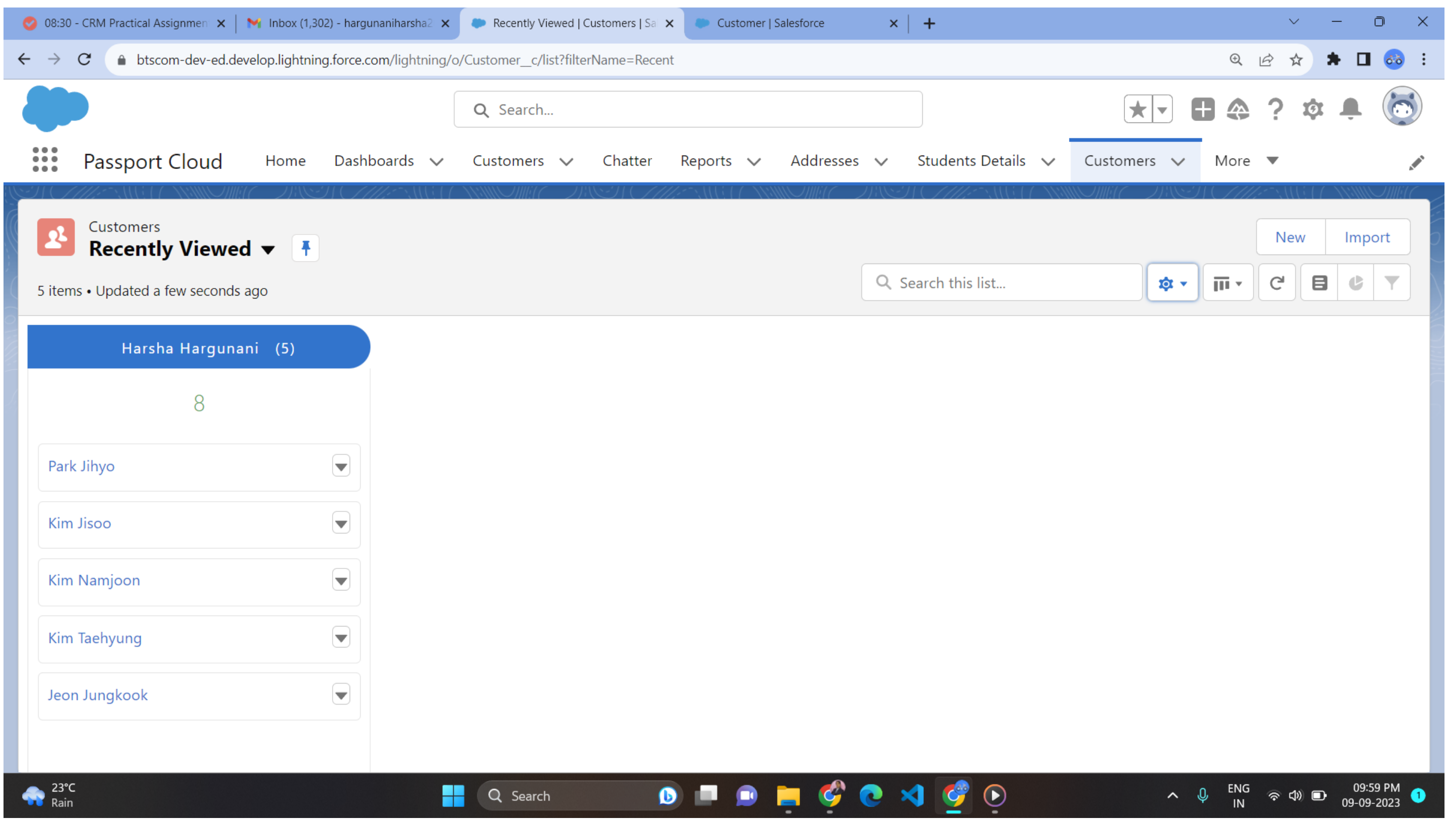


10. Summarize By - Maximum amount paid



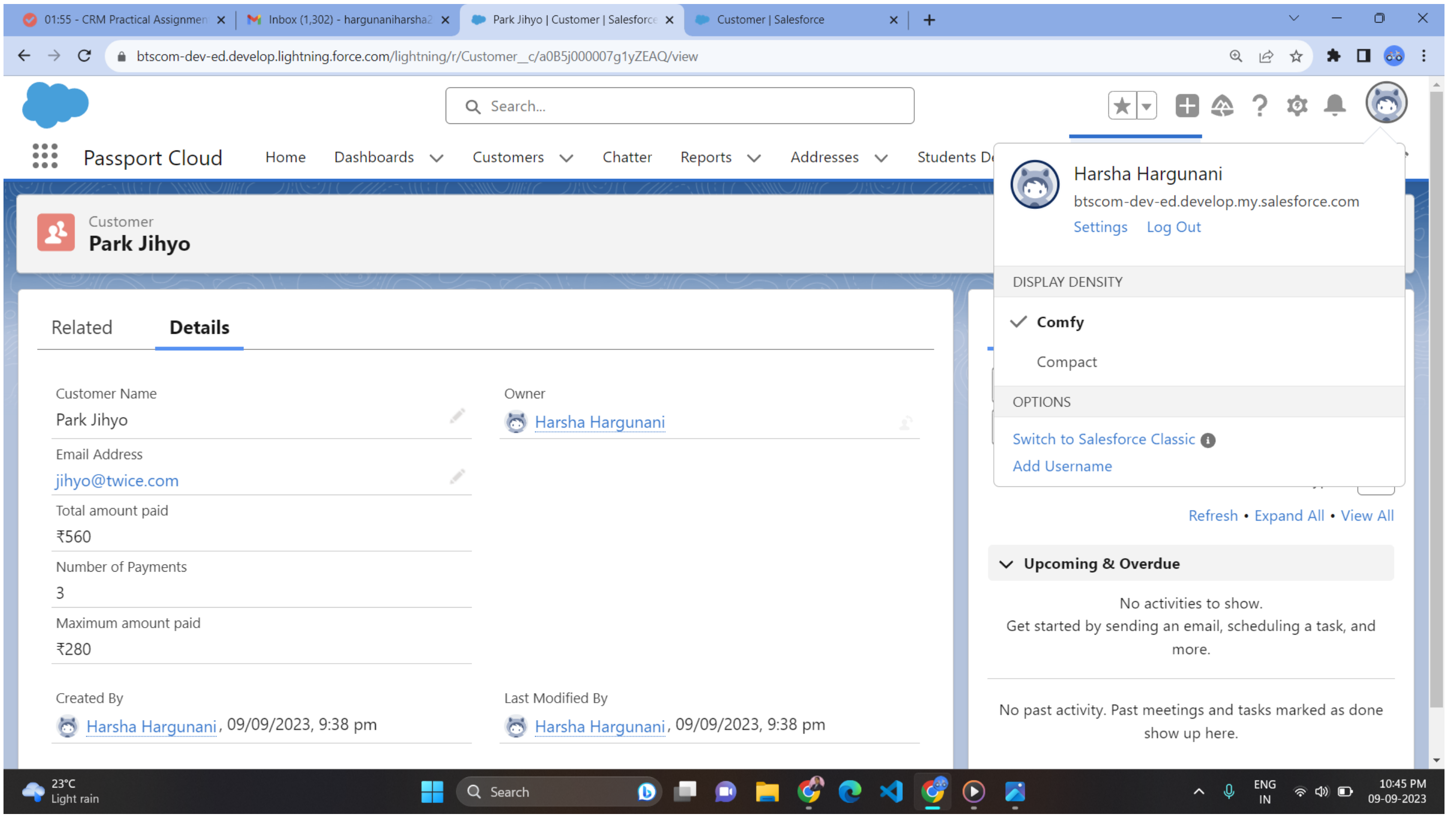
Sr. no.	Customer Name	Maximum amount paid
1	Jeon Jungkook	500
2	Kim Jisoo	345
3	Kim Namjoon	475
4	Kim Taehyung	600
5	Park Jihyo	560
Total	**All**	**1975**

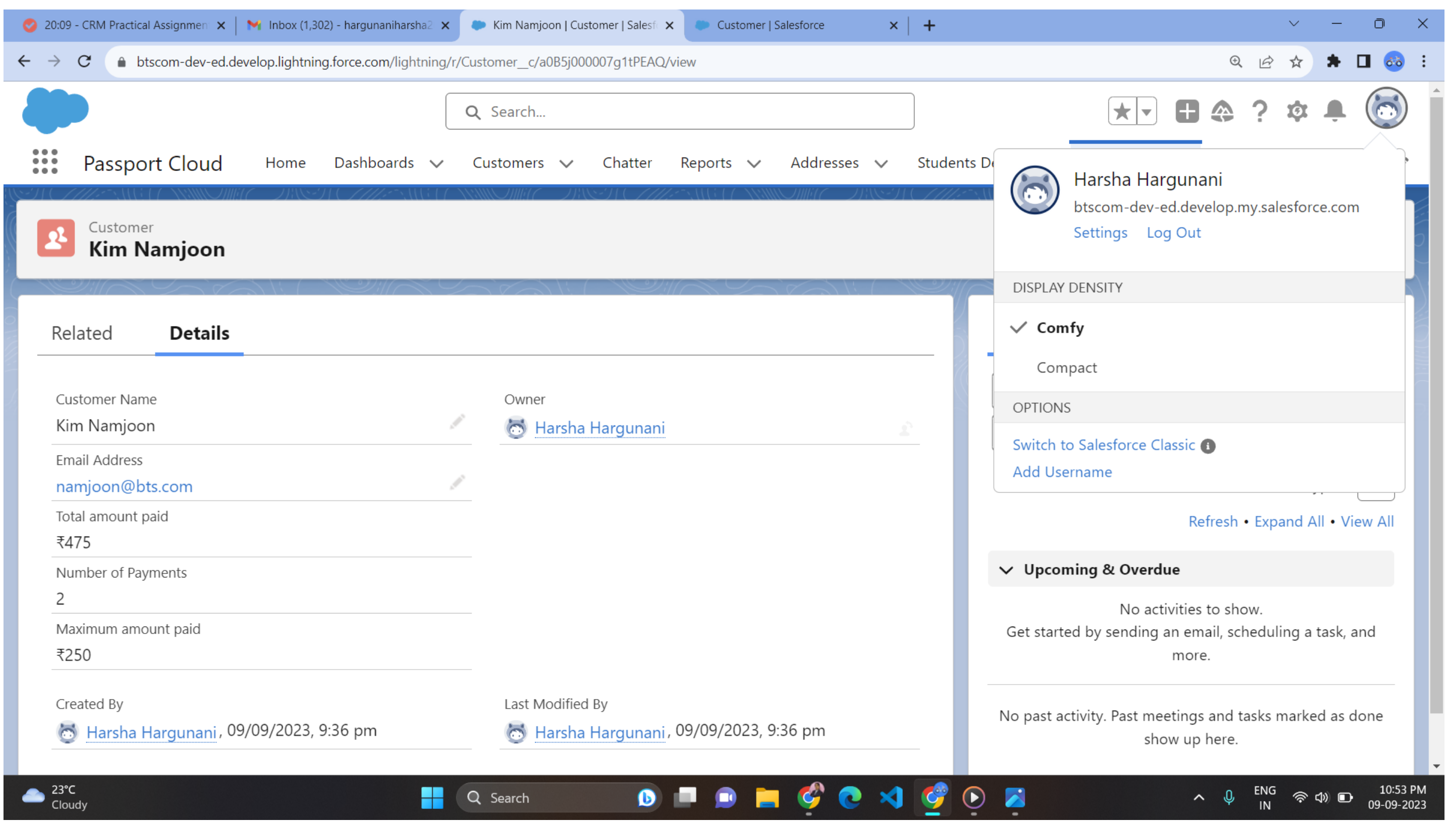
11. Summarize By - Number of Payments



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

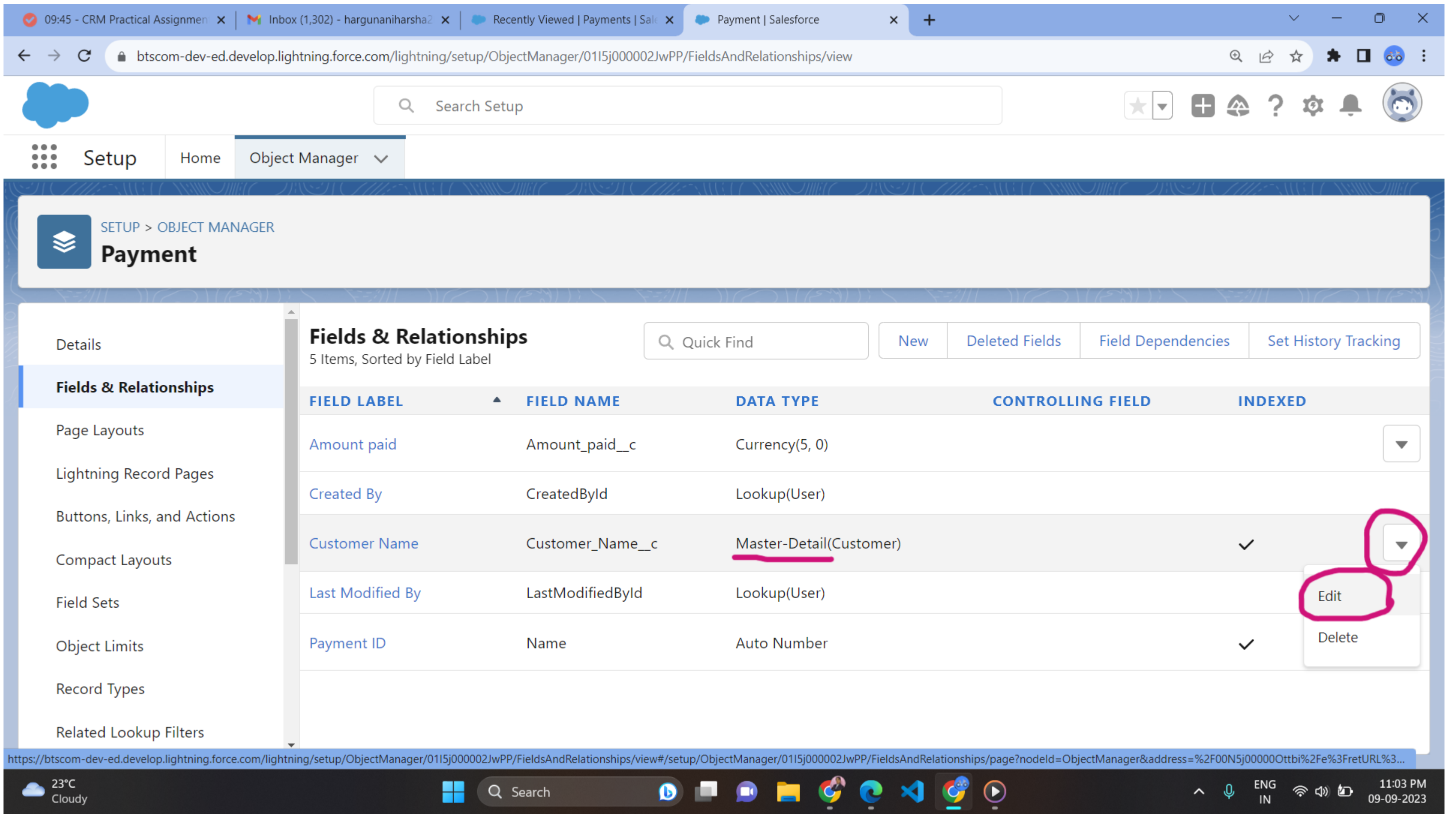
12. These Rollup Summary can also be seen for individual customer records.

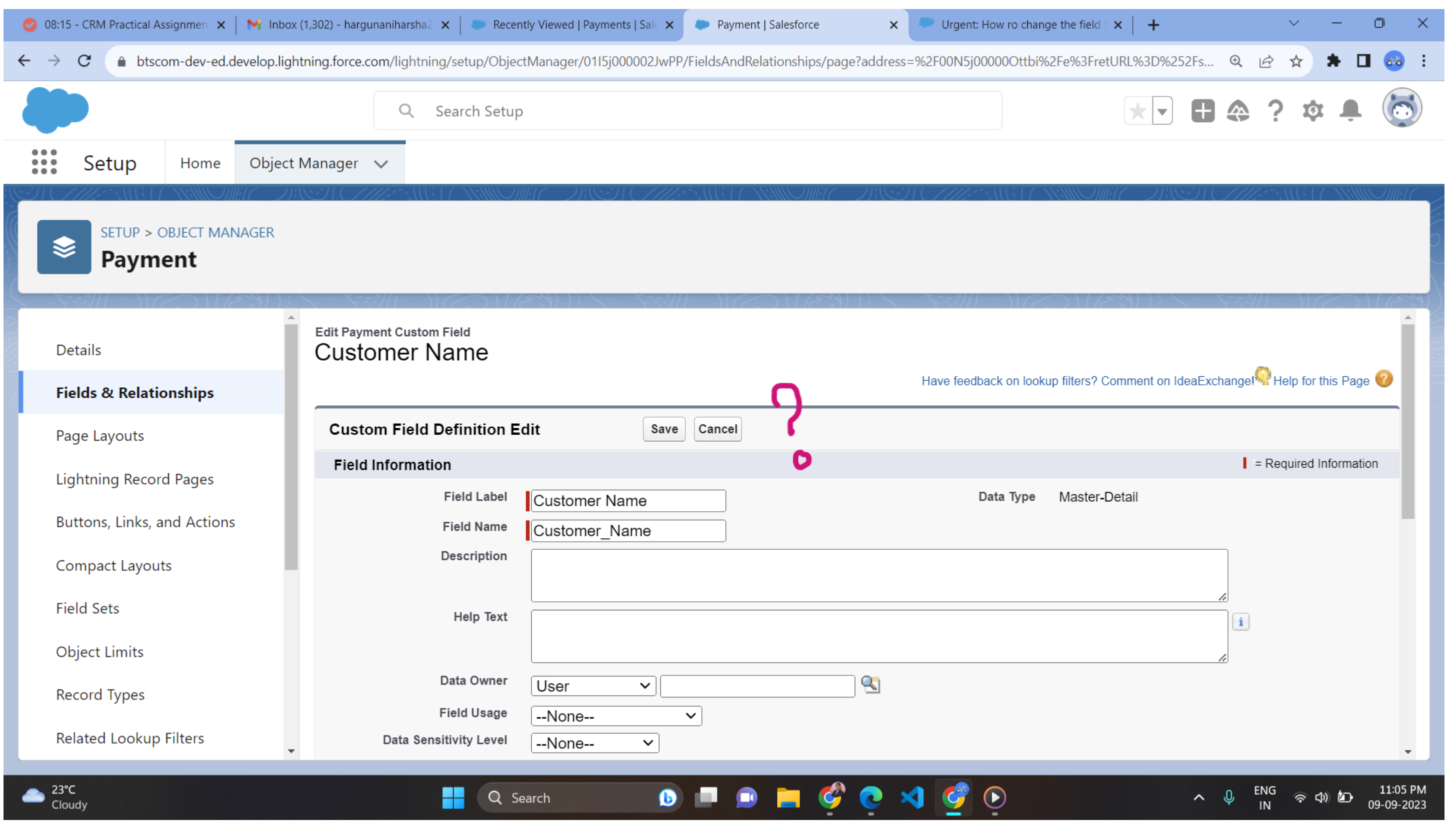




Q10. Now try to convert this relationship into Lookup. And check what happens?

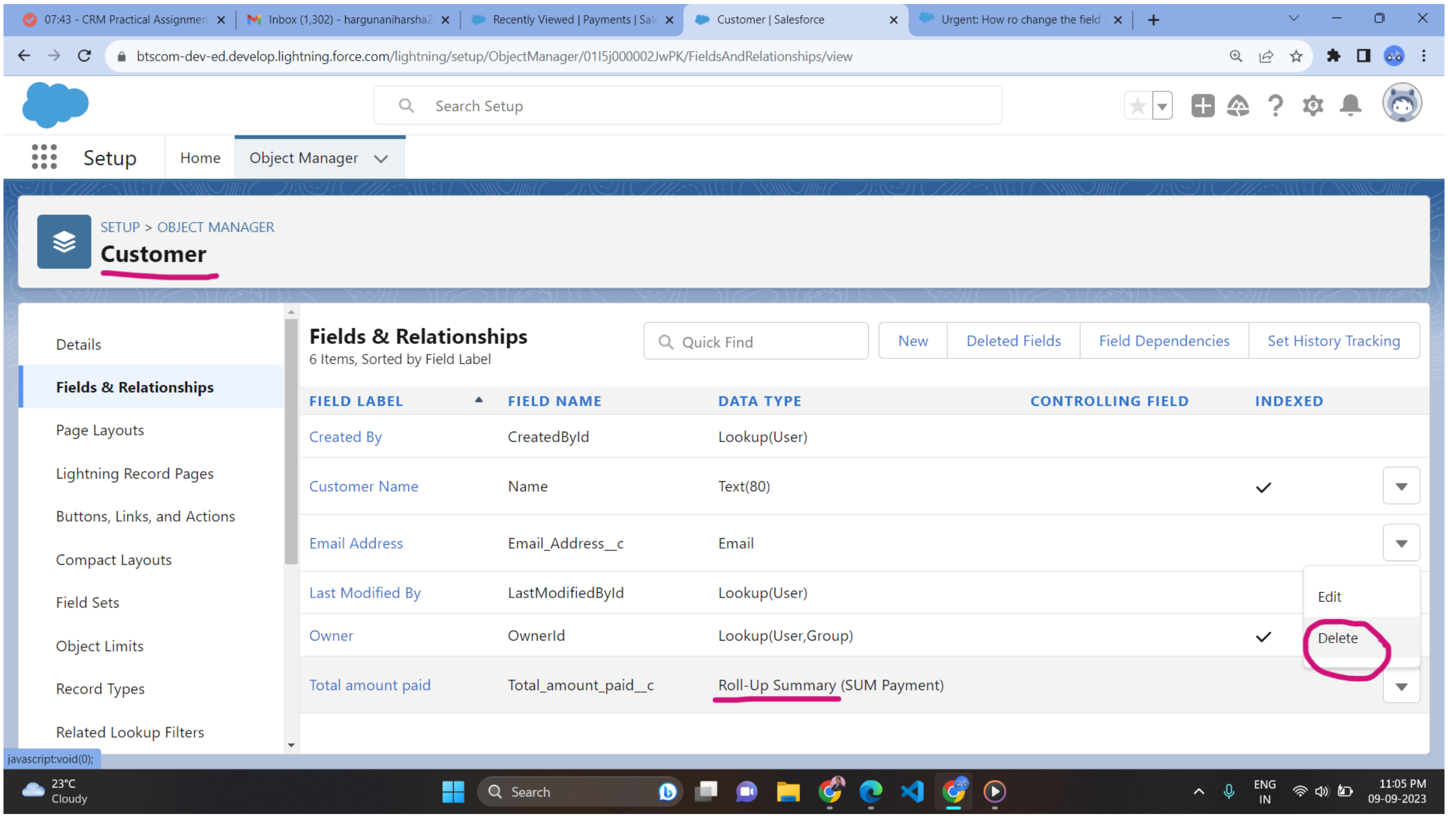
Ans. Step1: To switch relationship type, go to child object and “Edit” the master-detail field.



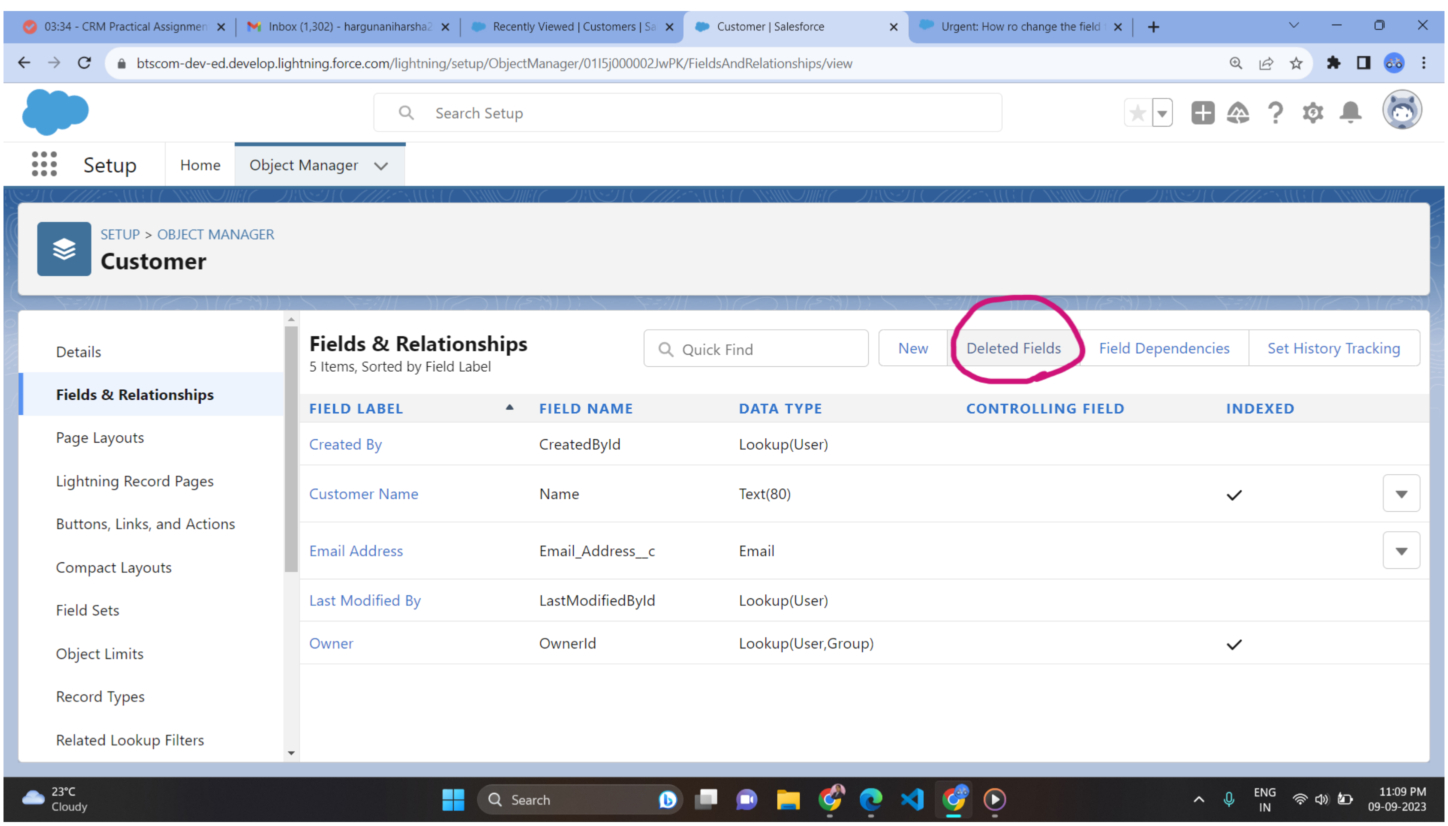


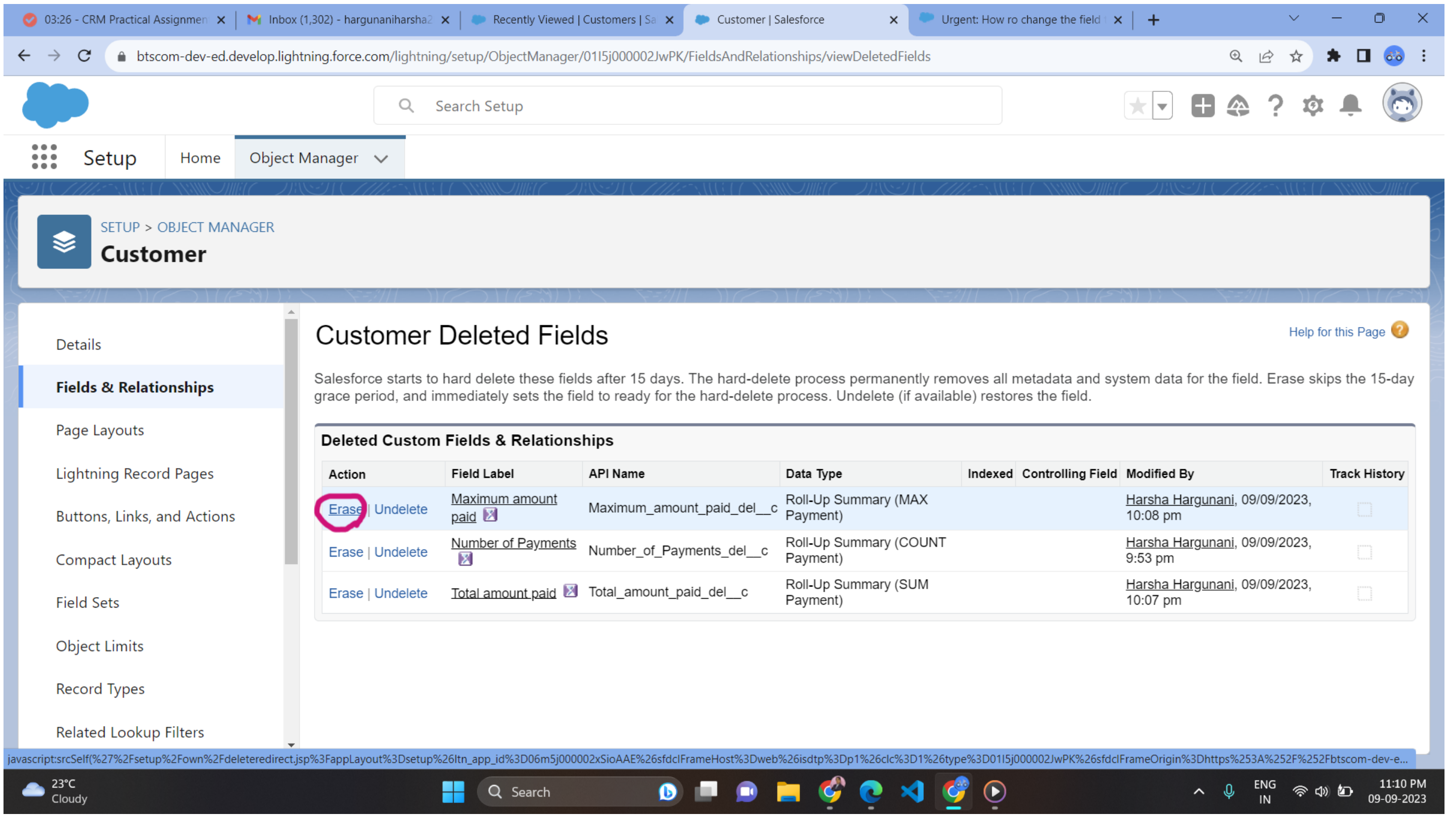
Step2: However, it was observed that the option to change the field type was not available.. This happened because we still have rollup summary fields present on the parent side.

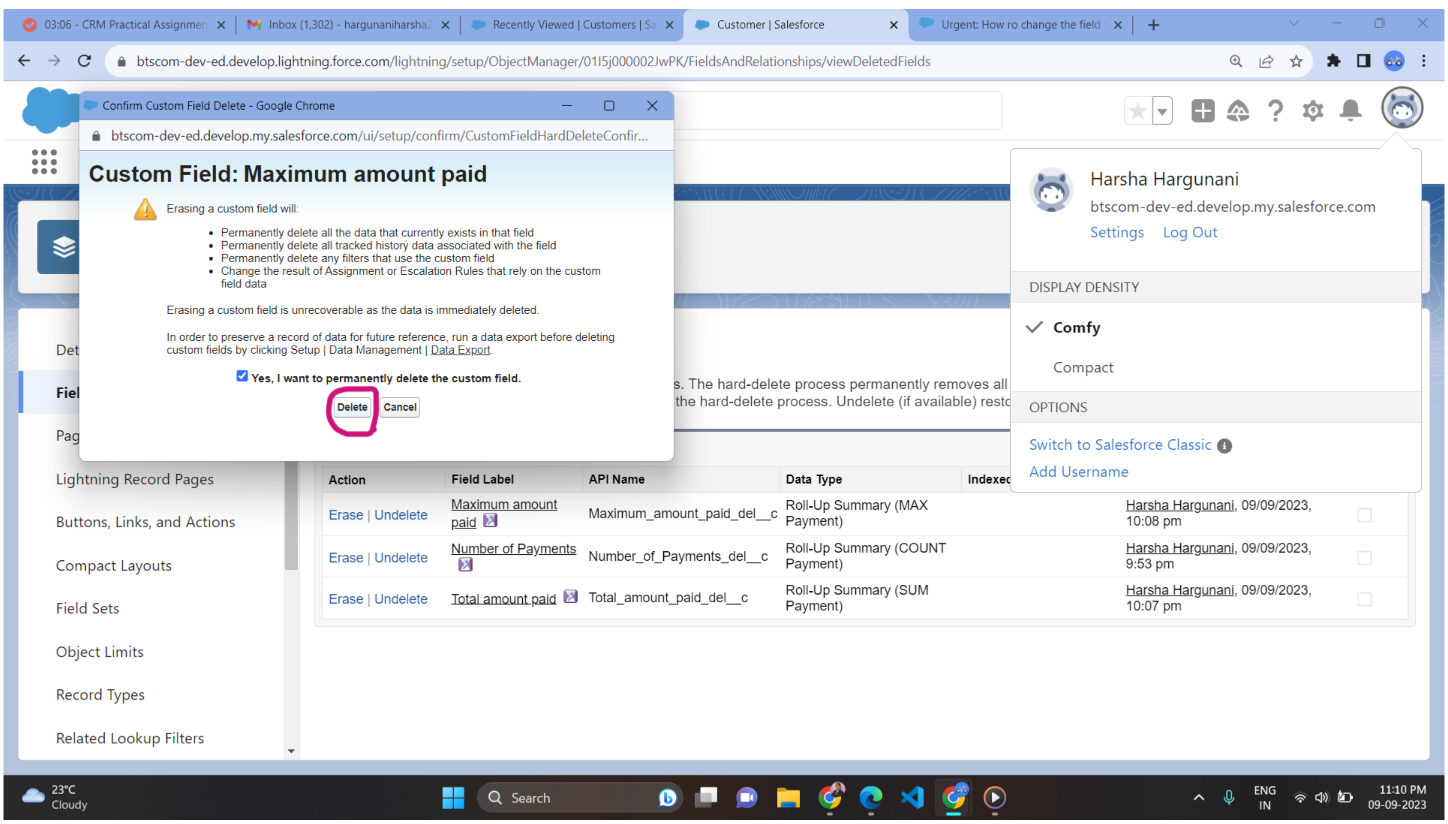
Step3: Navigate to the “Customer” object and delete all the rollup summary fields.



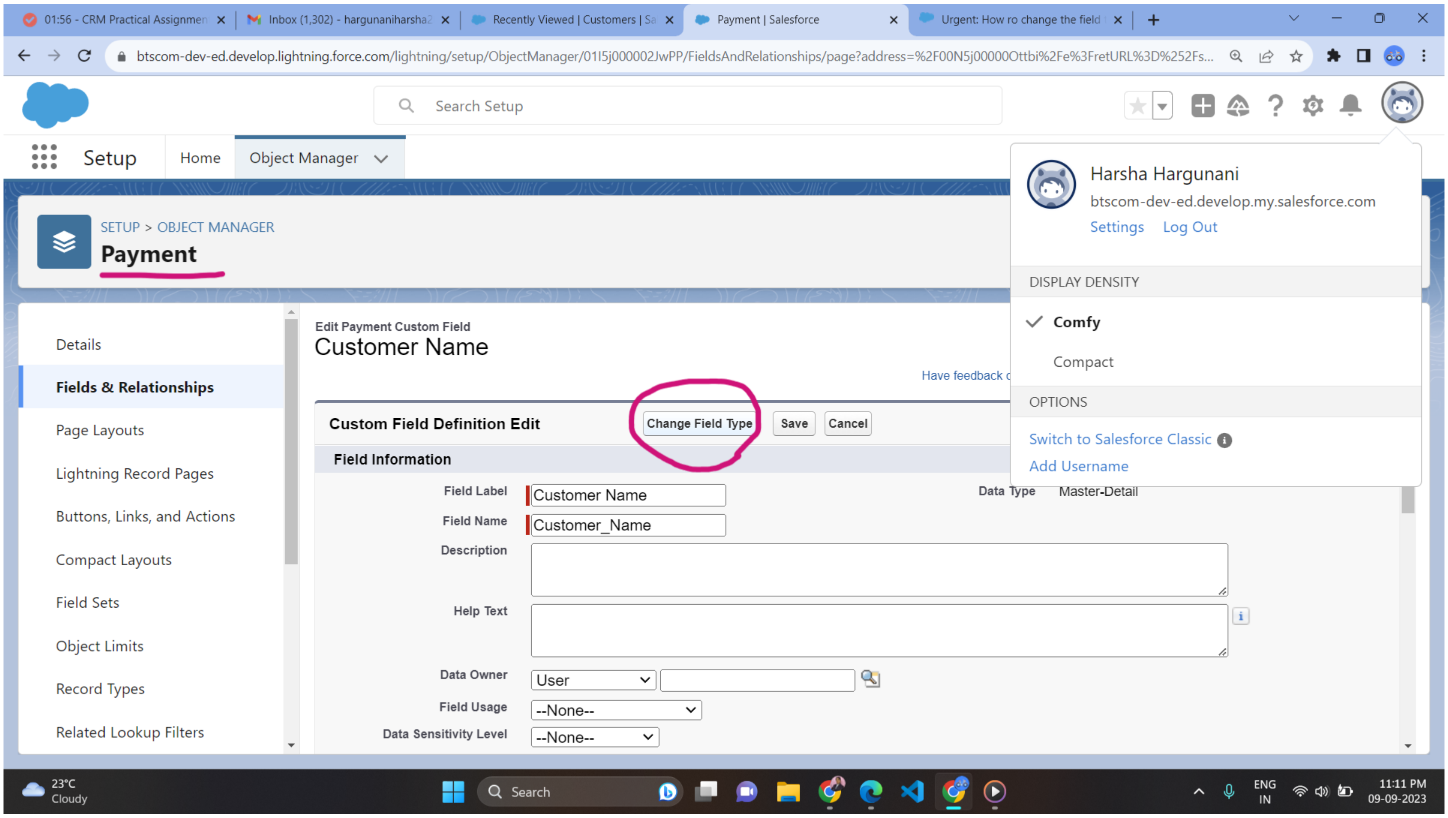
Step4: However, this isn’t sufficient to change the relationship/ field type yet. Click on “Deleted Fields” and erase each of the deleted rollup summary fields.



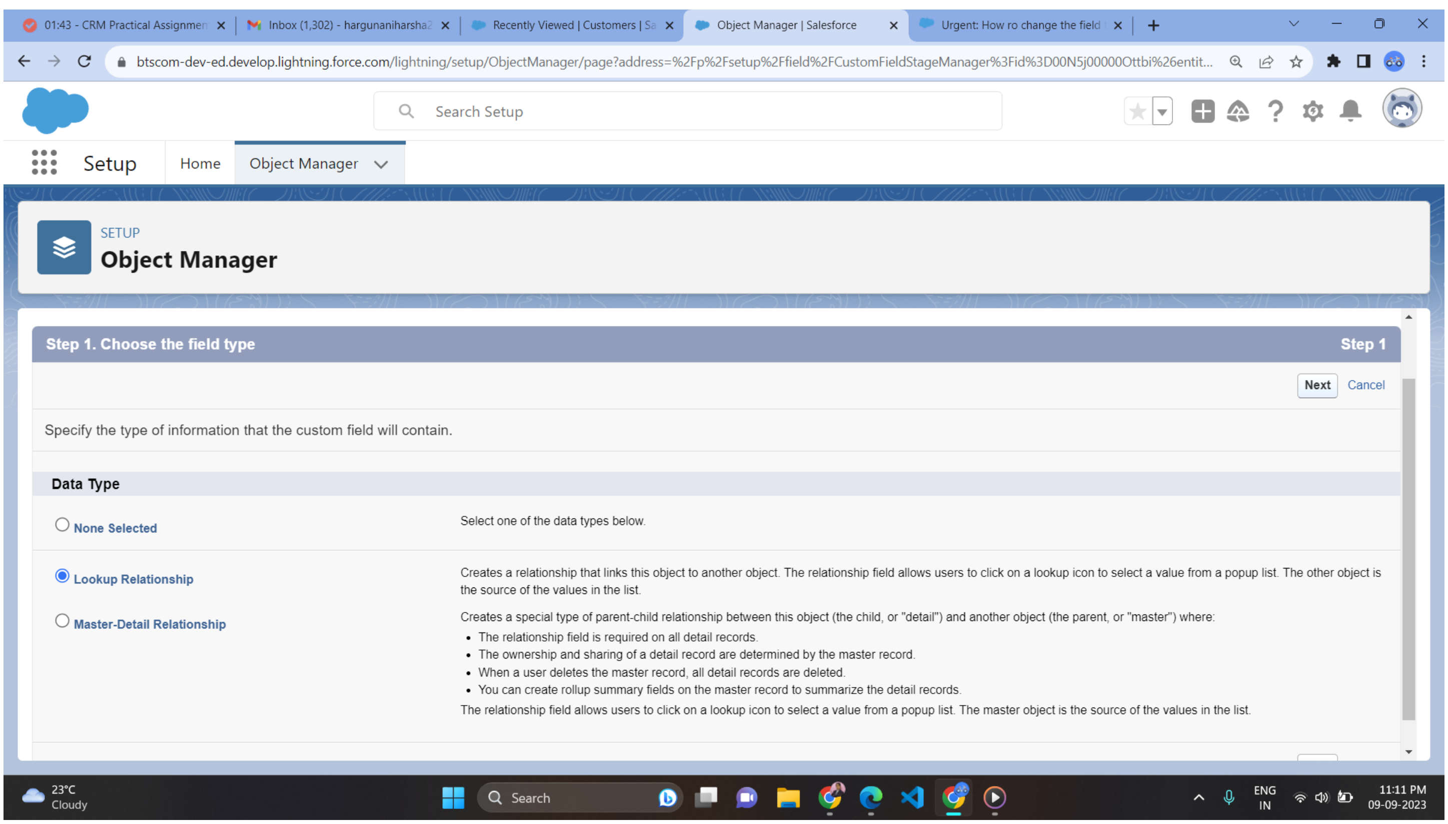




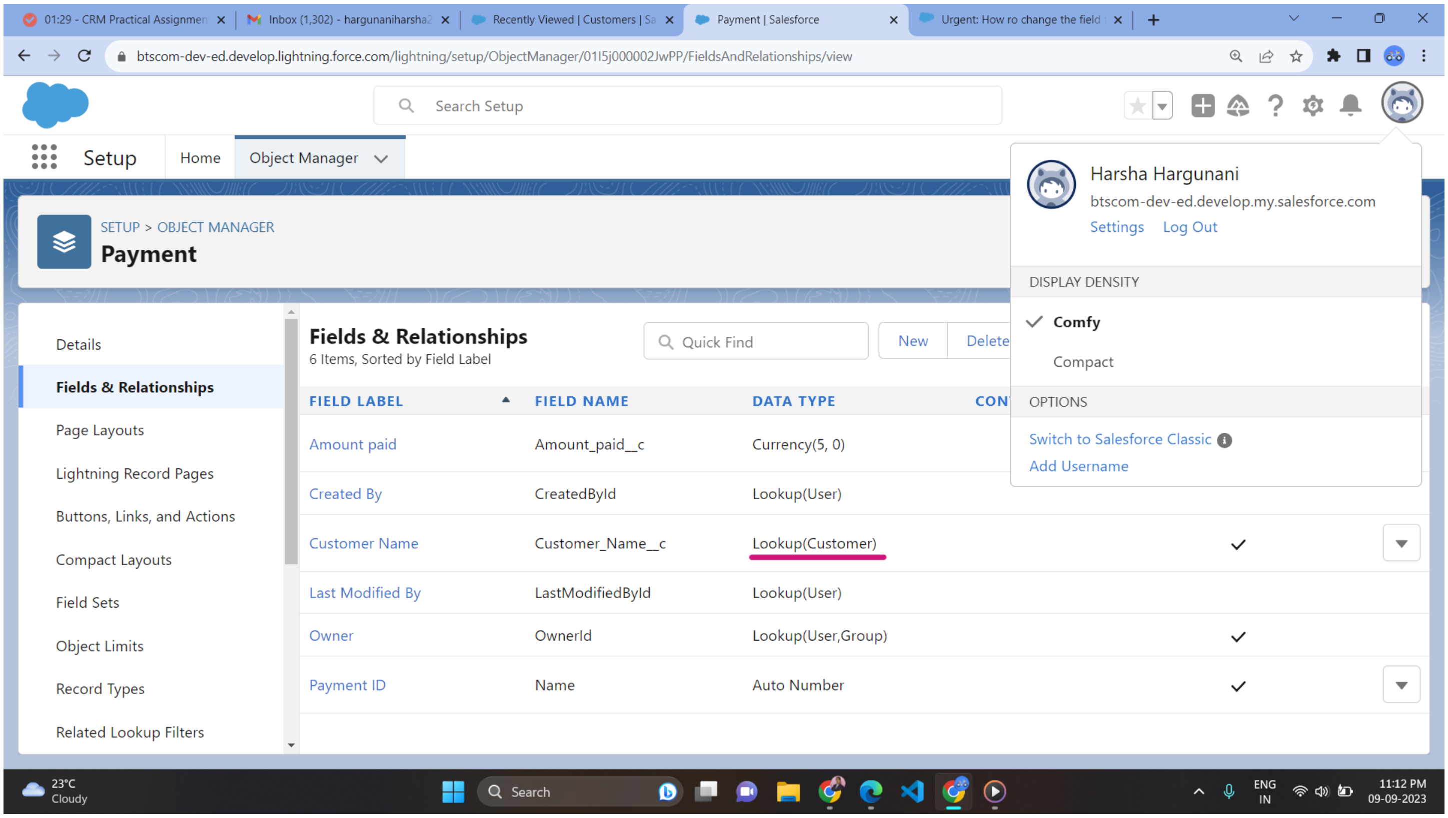
Step5: Now, when we again try to “Edit” the Master-Detail Field, the option to “Change field type” is available.



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



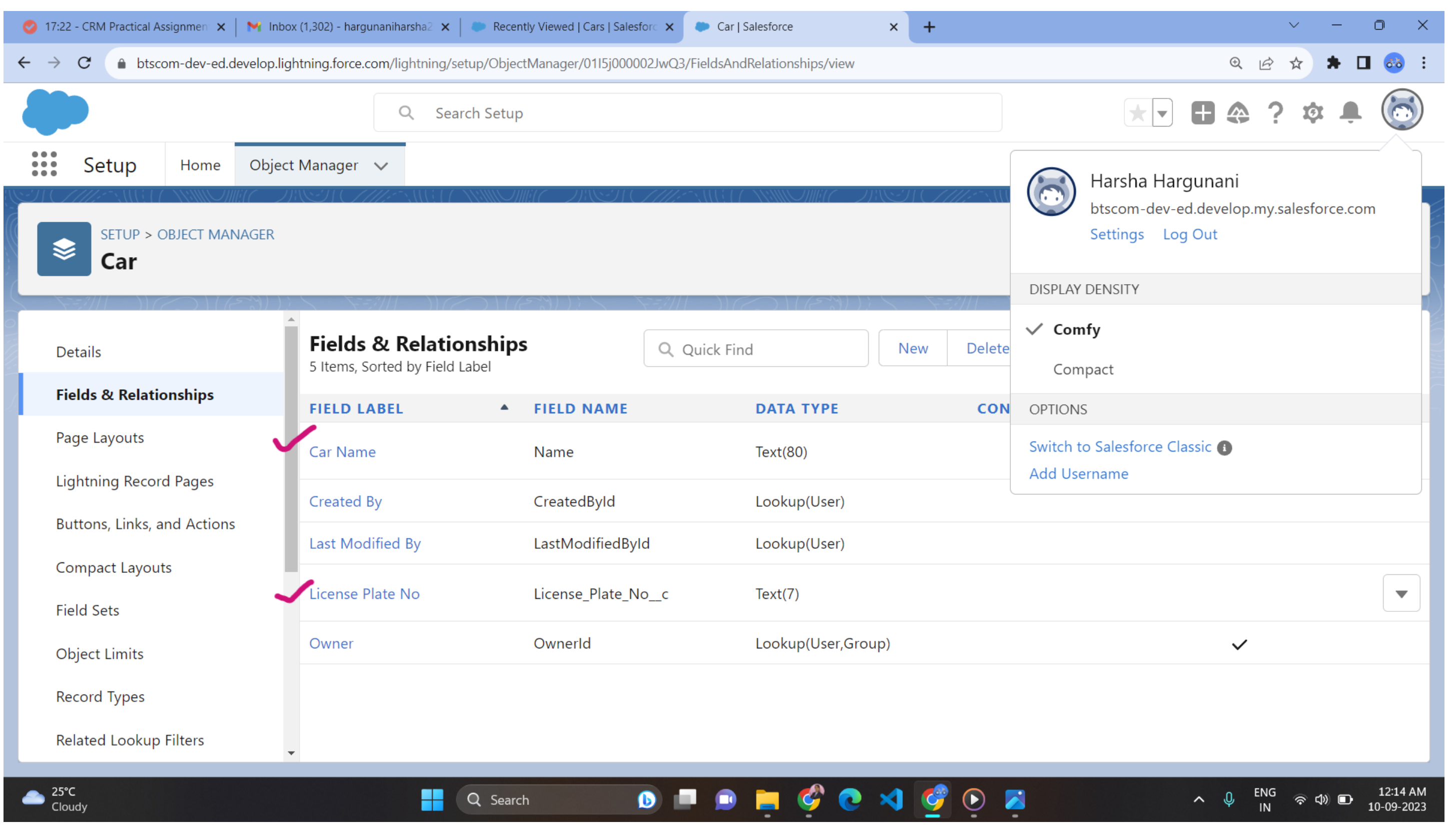
It’s done. We’ve successfully changed the field type from Master-Detail to Lookup Relationship Type.

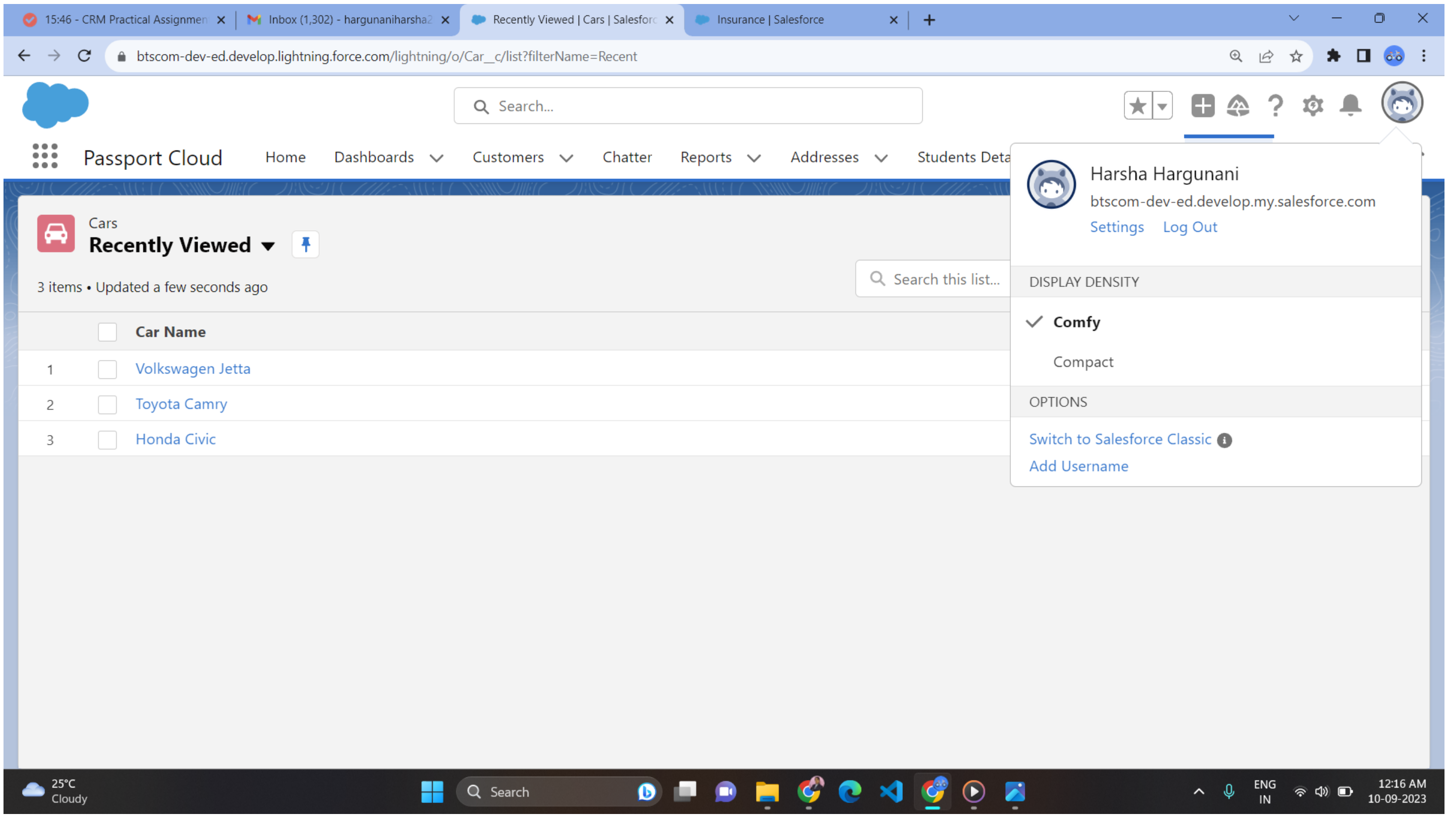


Q11. Create two Objects: “Car” and “Insurance” . Create some Fields. Create some records in the Insurance Object. Create a Lookup Relationship.

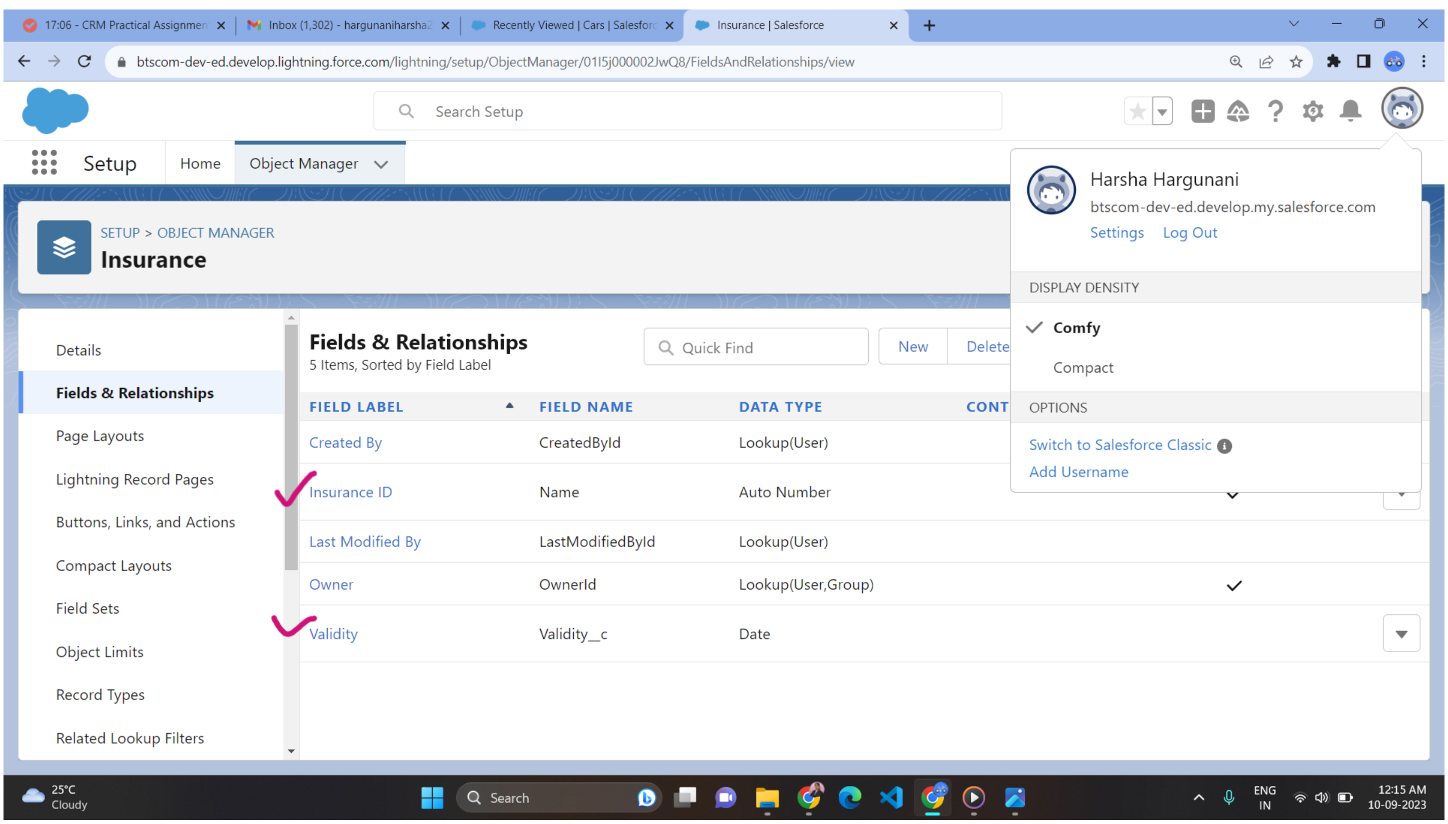
Ans.

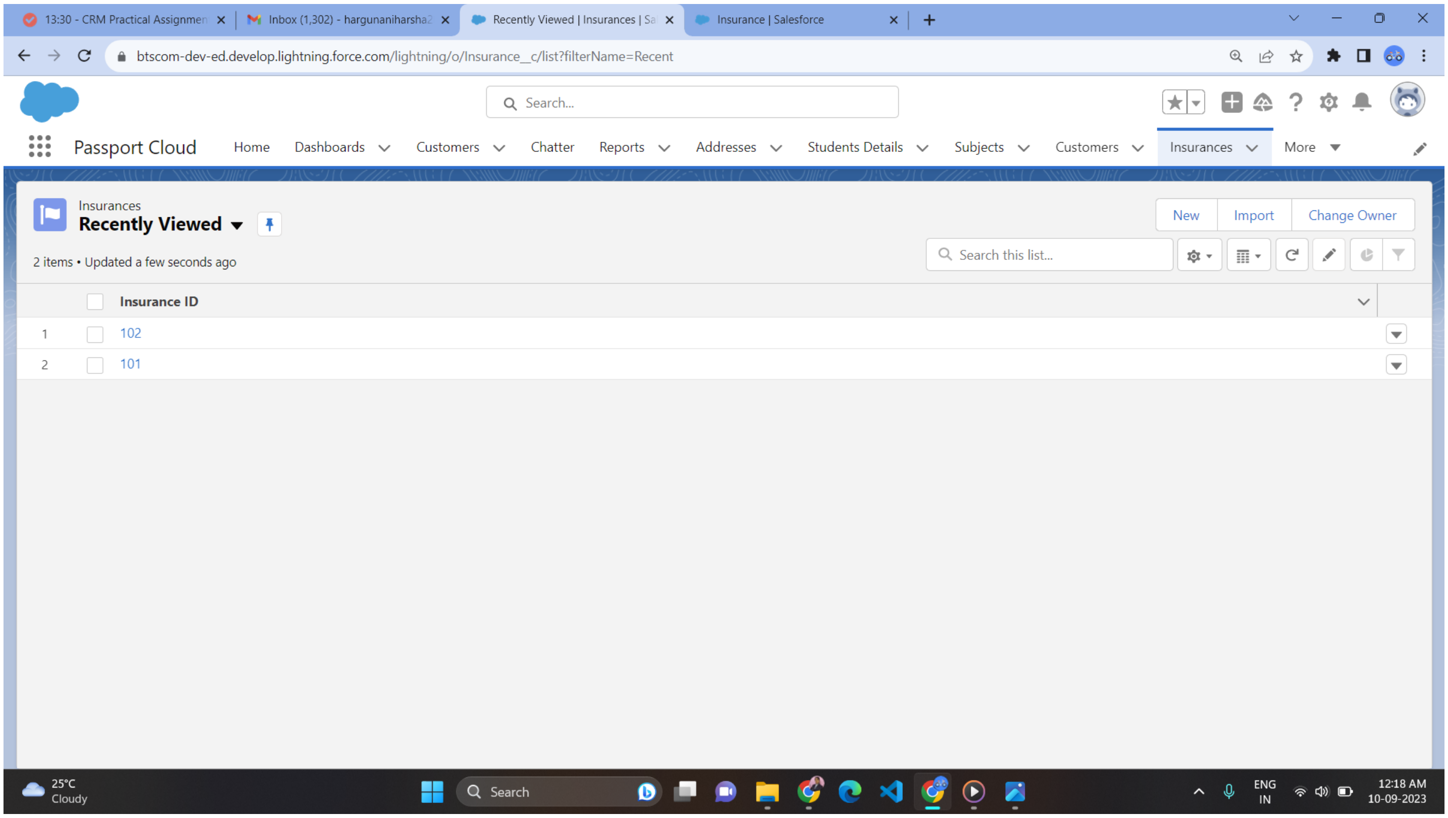
1. Following fields and records were created in the “Car” object.



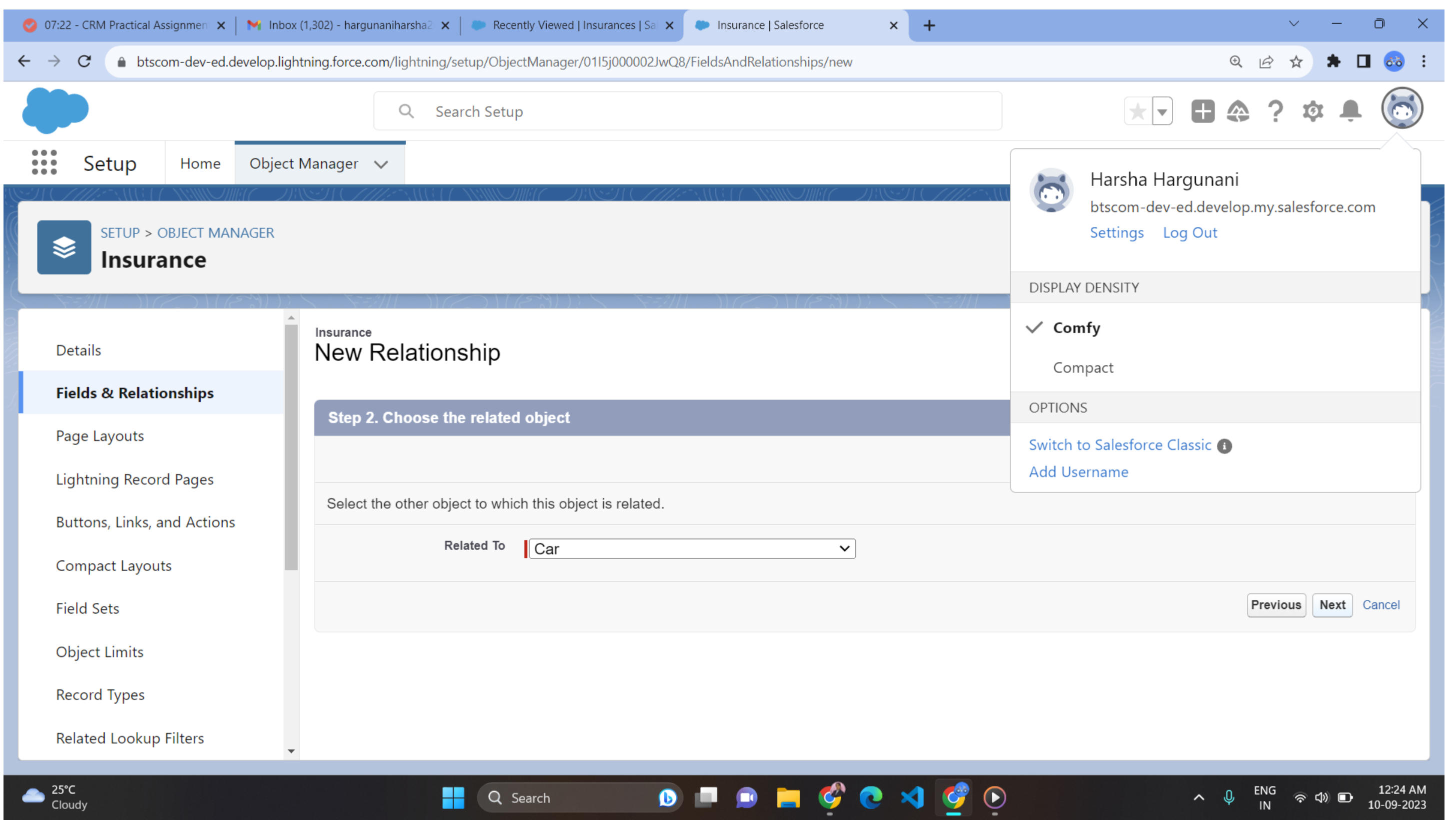


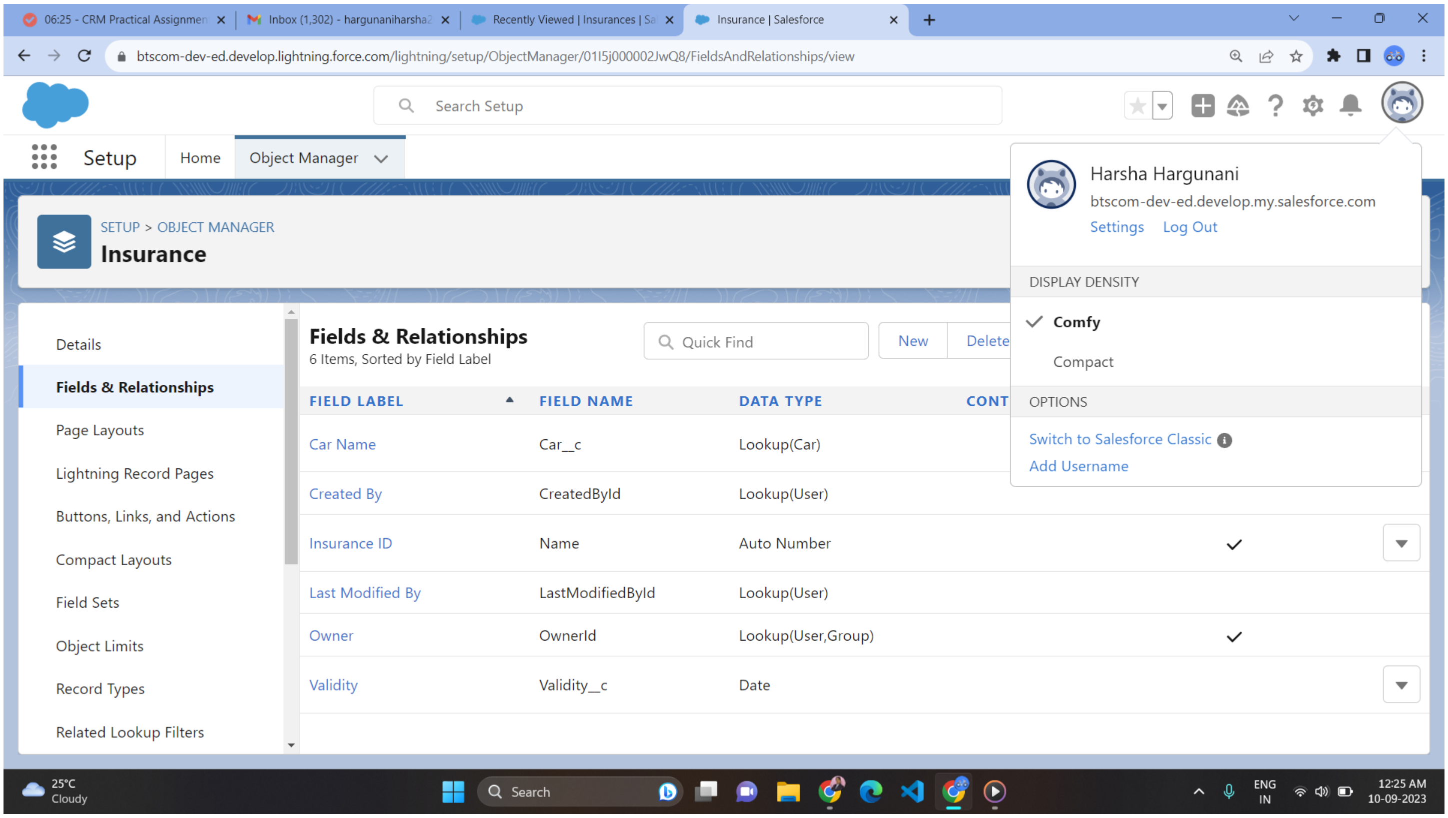
2. Following fields and records were created in the "Insurance" object.



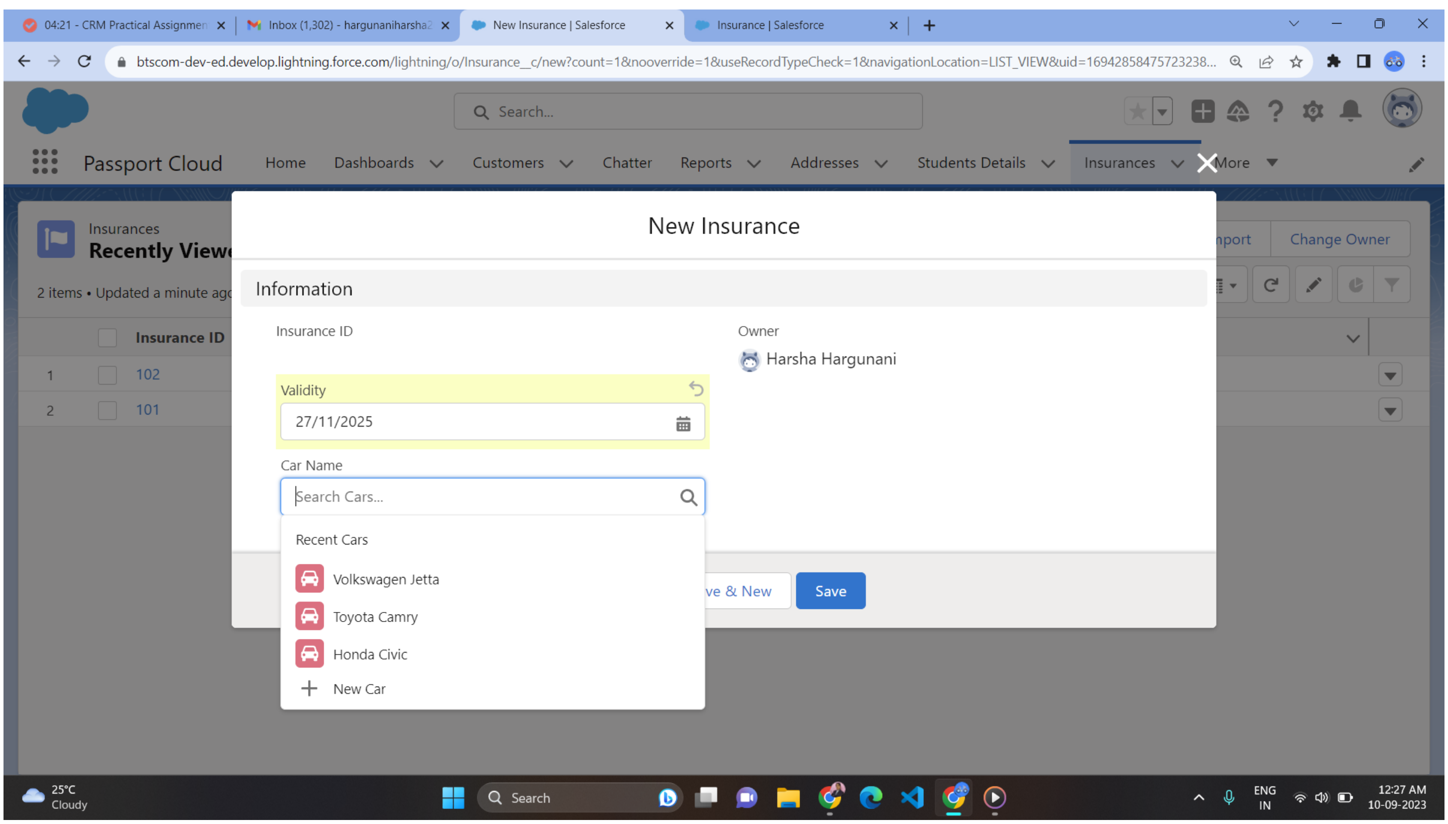


3. Build a “Lookup” relationship on Insurance.





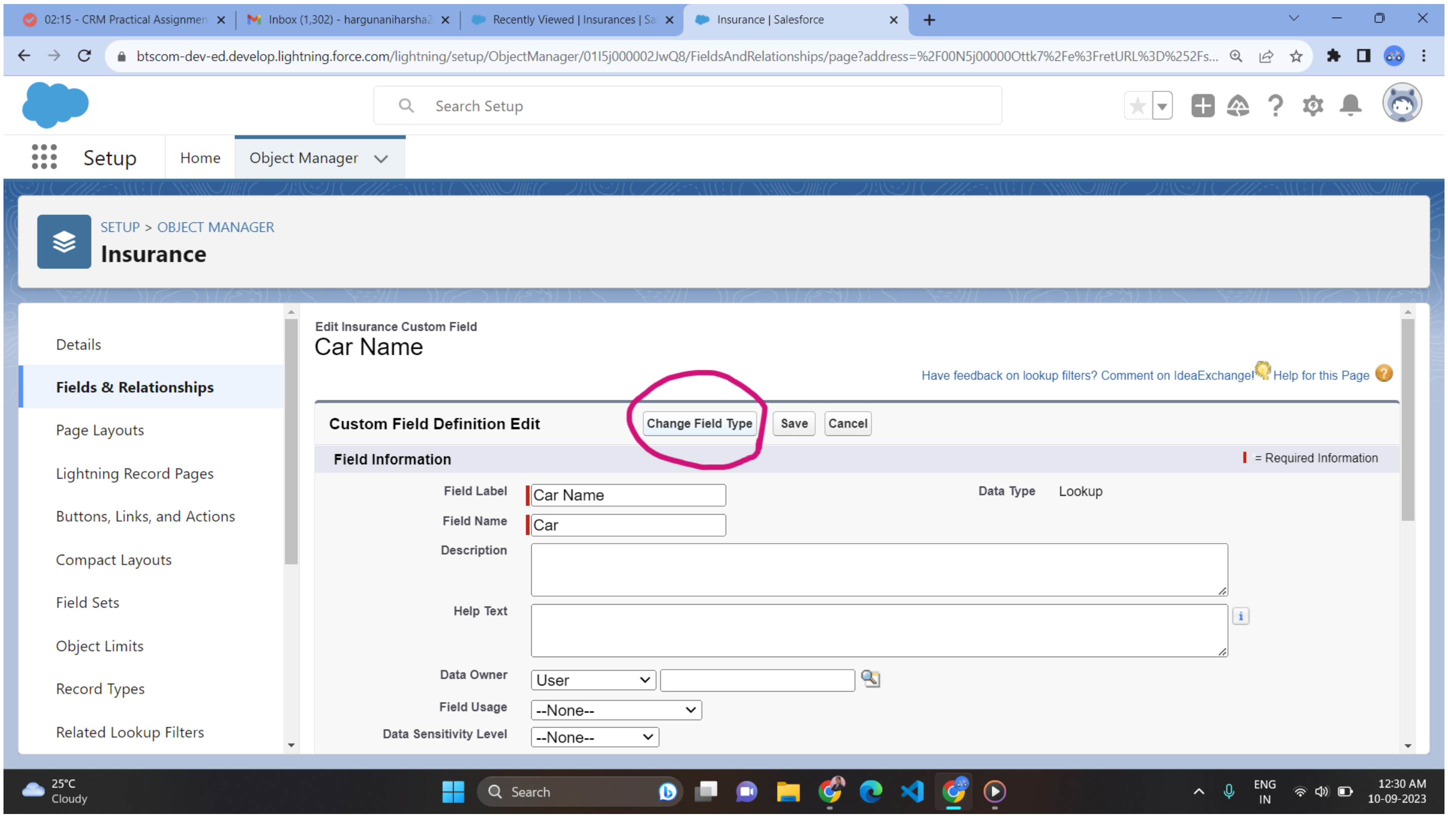
4. Now we can see "Car" appearing in the Lookup dialog.

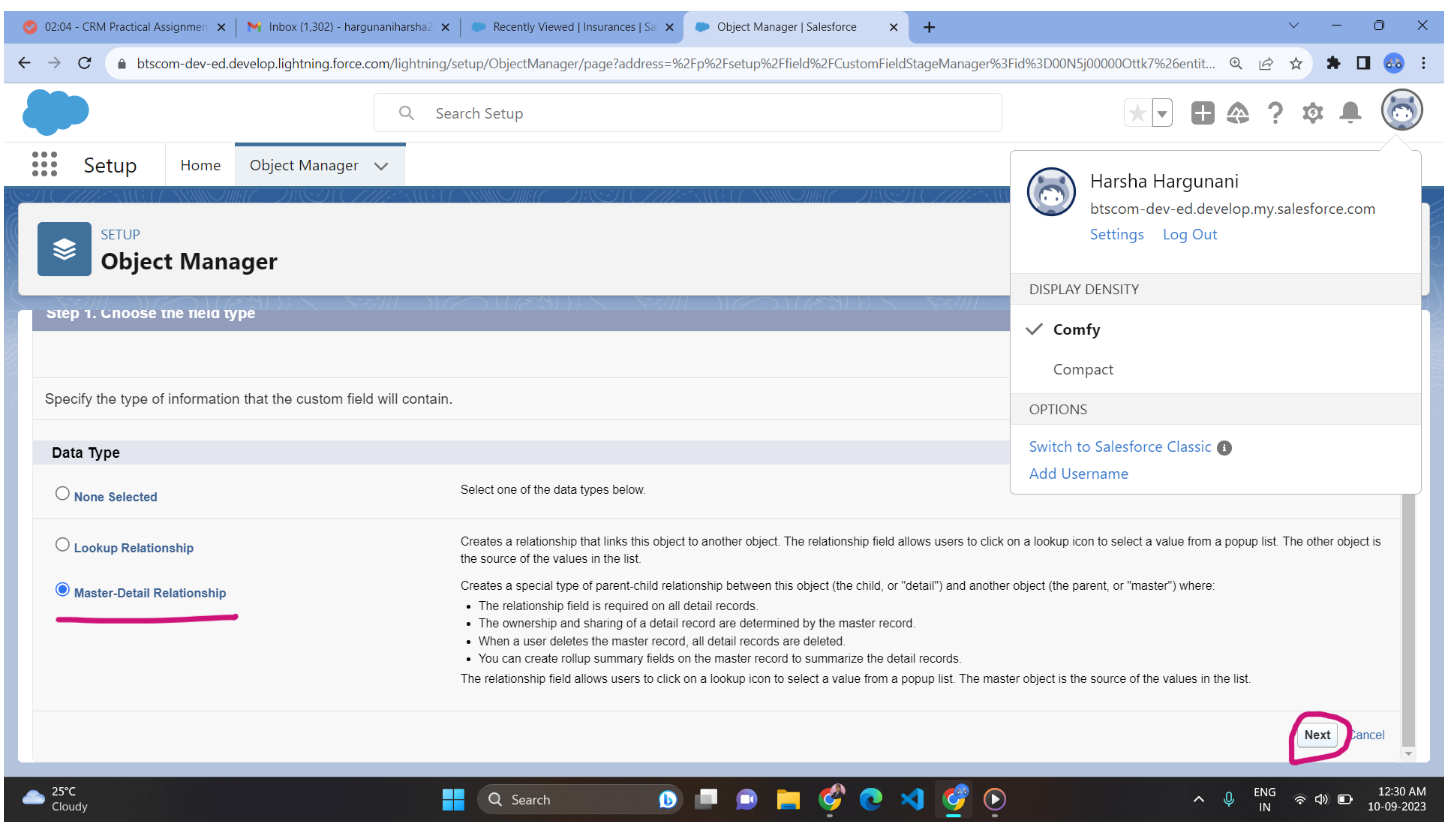


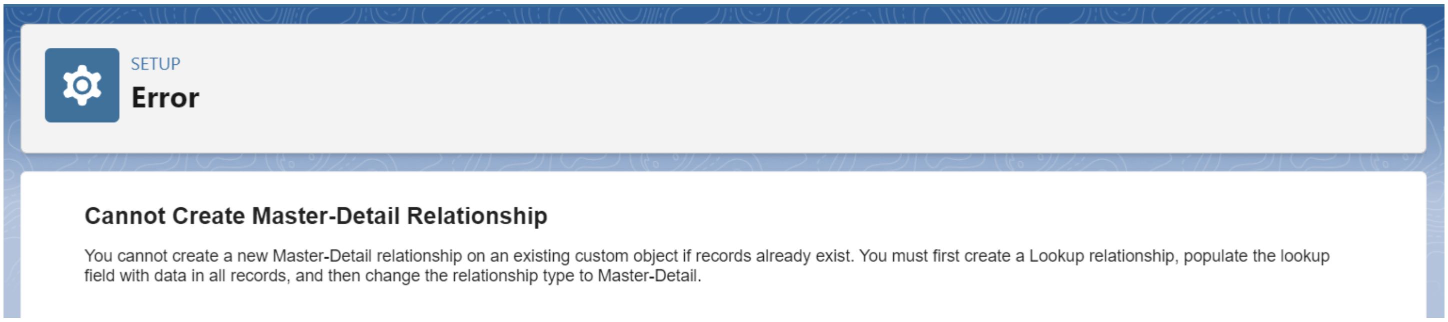
Q12. Try to convert into a Master Details Relationship. And check what happens?

Ans.

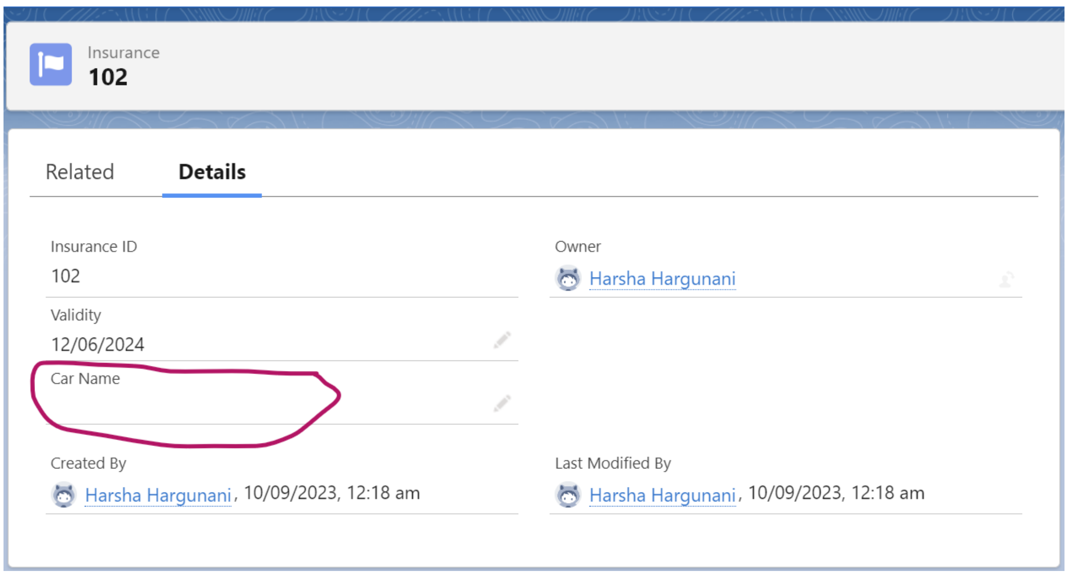
1. Select the Lookup field that is Car Name | Edit | Change field type | Master-Detail | Next | Save





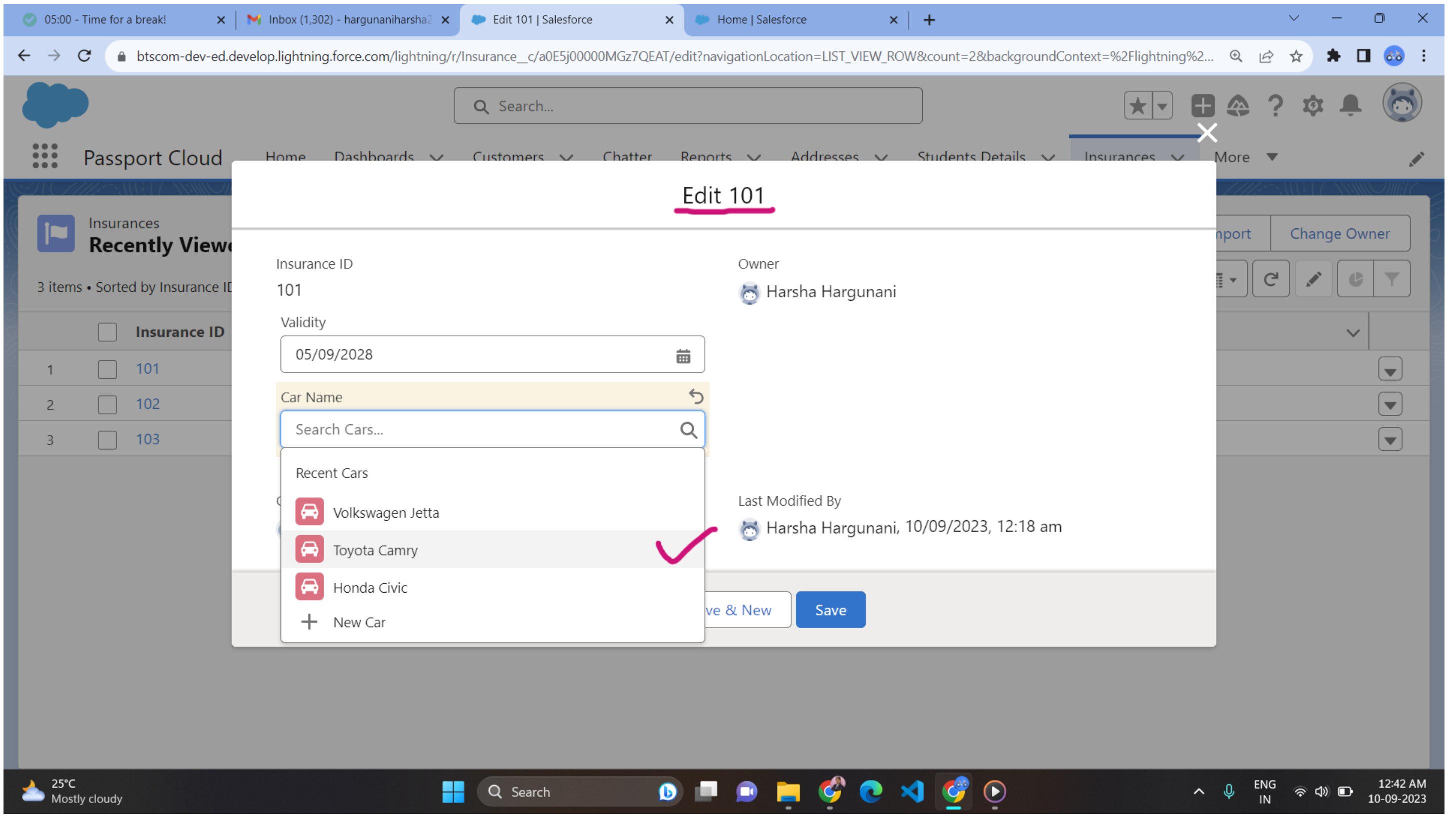


The warning mentioned above is triggered due to the presence of records on the child/detail side of the relationship. However, a similar error does not occur when attempting to establish a 'Lookup' relationship with existing records. This is because the Parent field is not mandatory in a Lookup relationship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

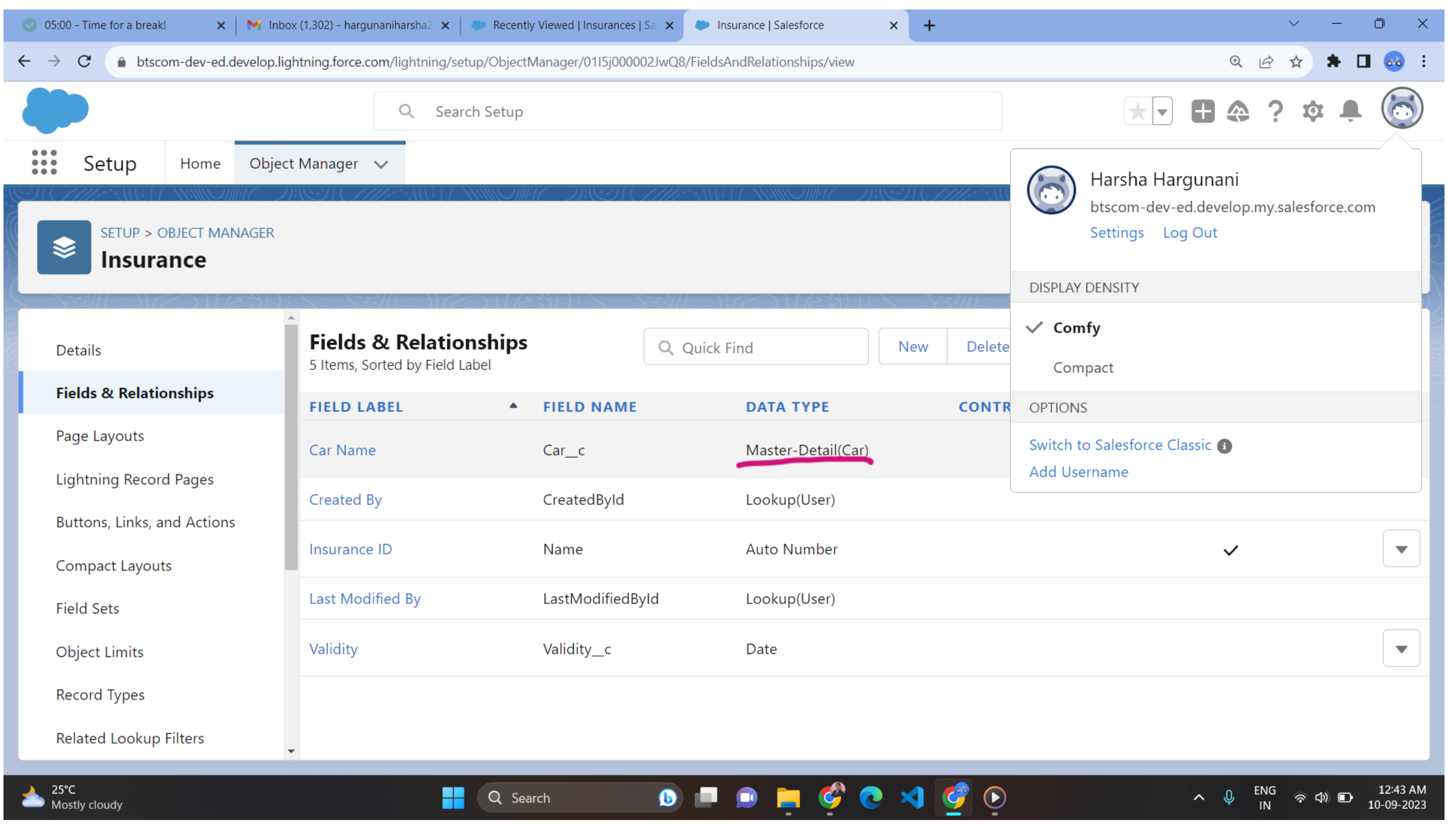


In contrast, such a scenario is not acceptable for a master-detail relationship, where the Parent field must have a value and cannot be left blank.

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



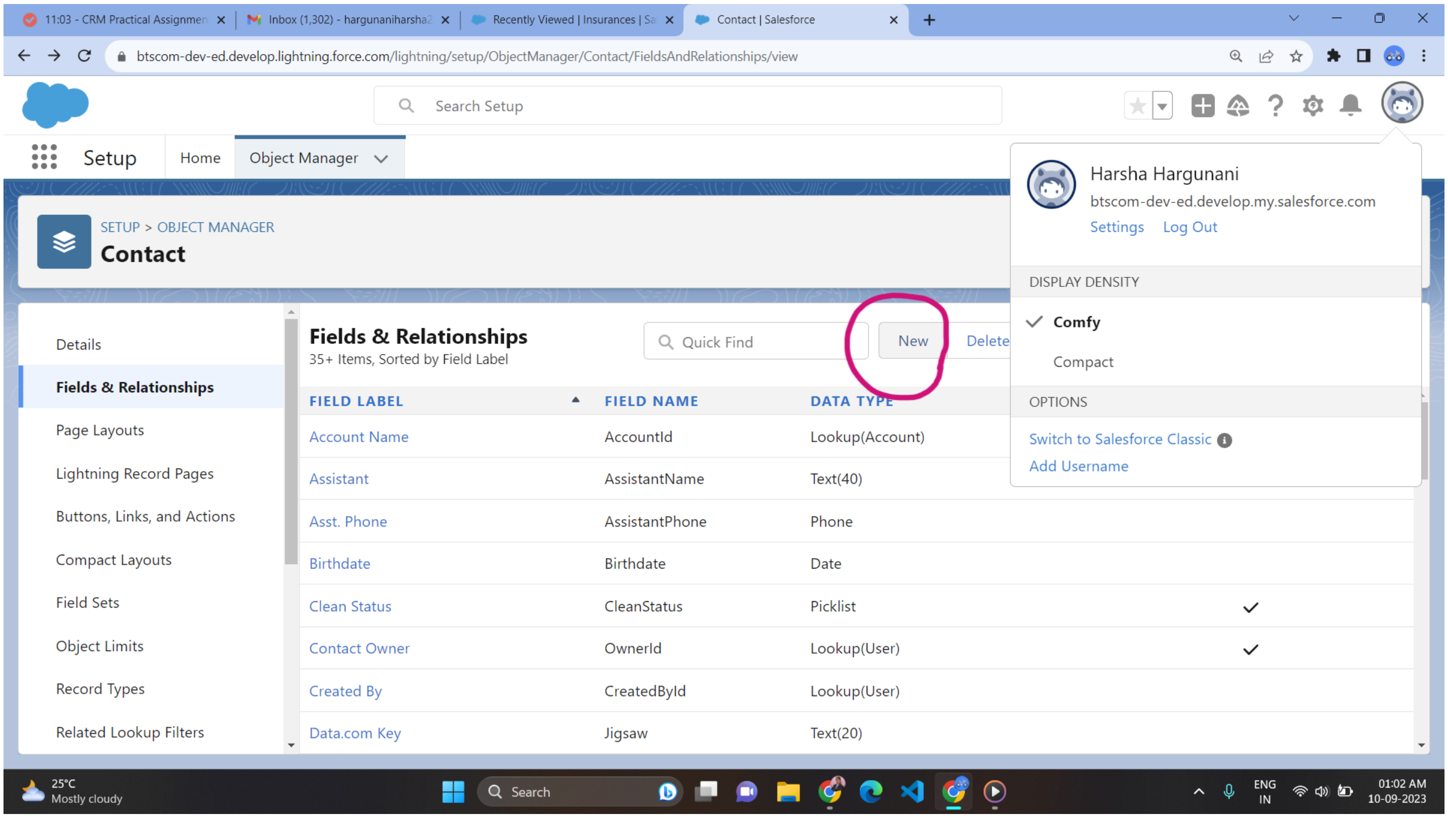
3. Now we can change the field type from lookup to master-detail without any error.



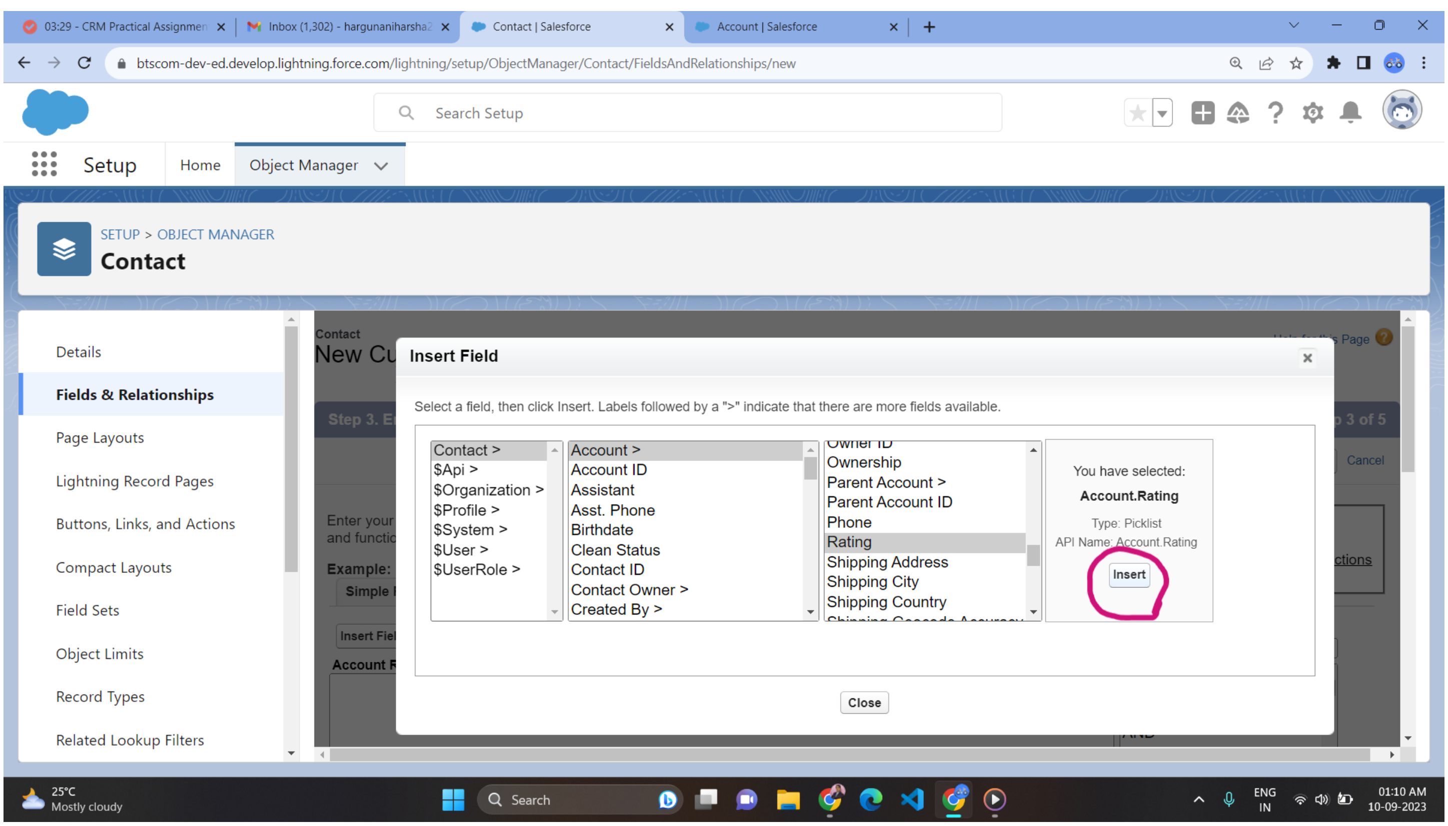
Q13. Create "Cross Formula Field" on Account and Contact objects. Show Account Rating at Contact side.

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

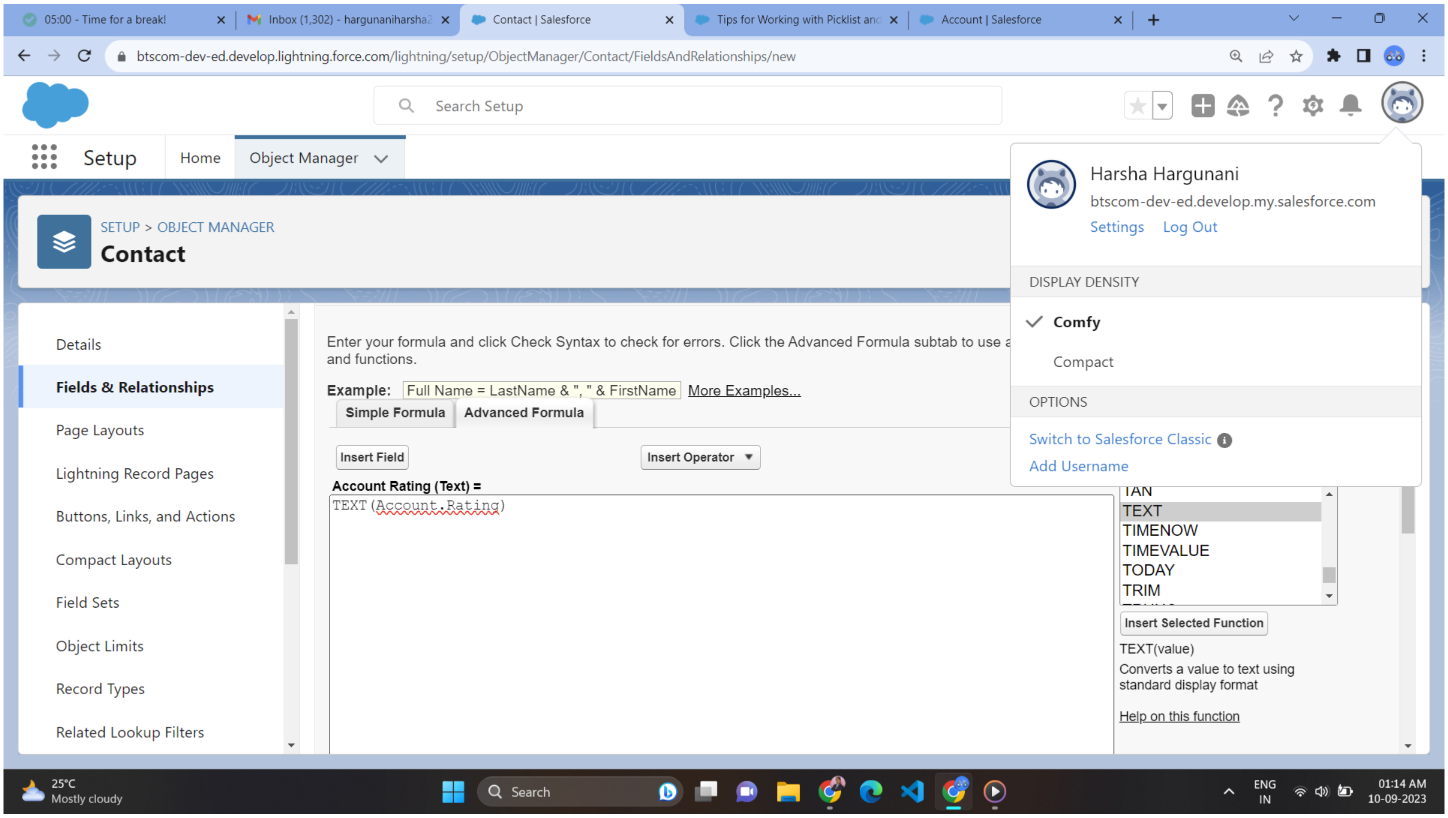
1. New Field | Data type - formula



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

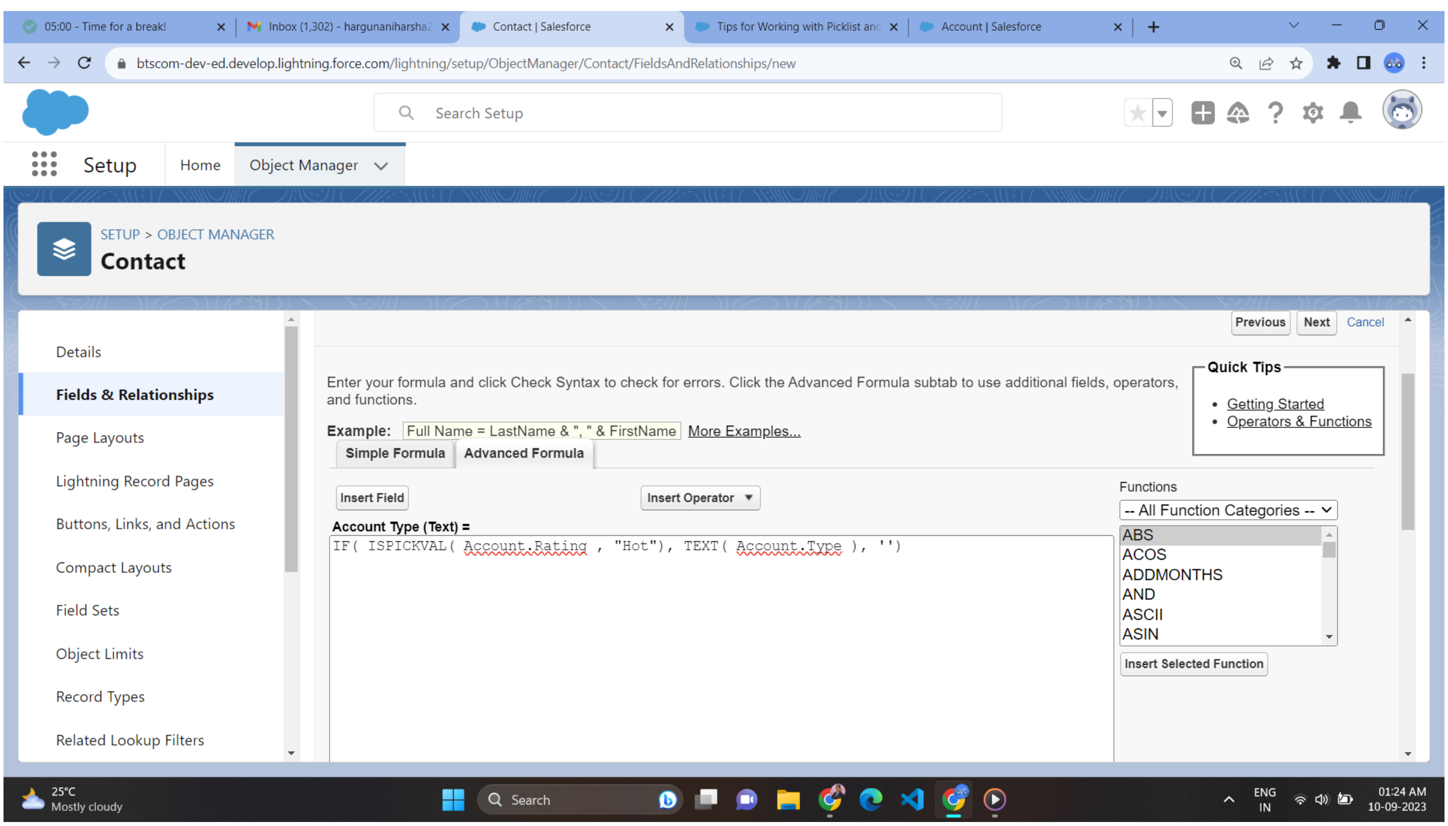


3. Enclose it within the TEXT( ) operator and click “save”.

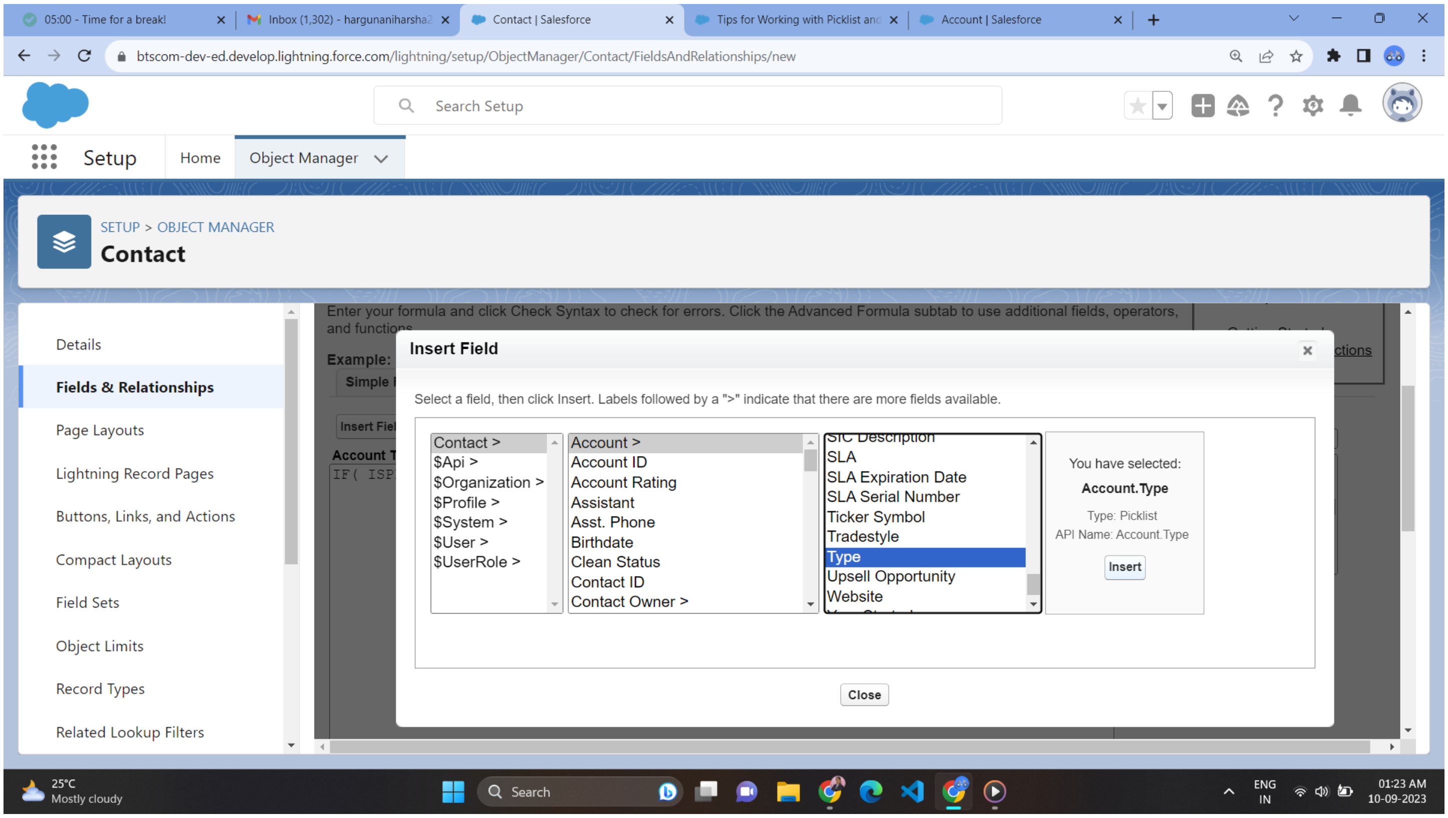


Q14. Show Account Type at Contact Side, ONLY IF Account Rating is Hot.

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

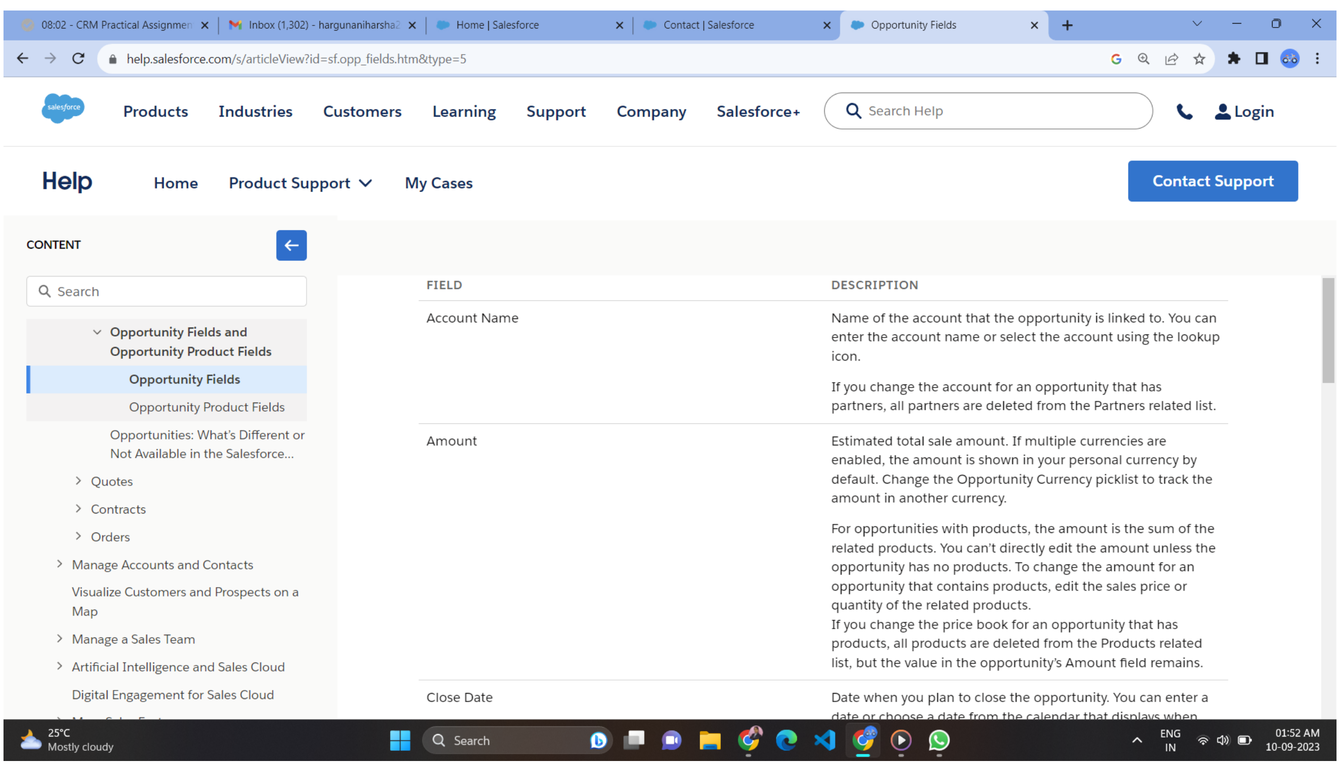


"Type" field is getting fetched from Account object and the field was inserted by-



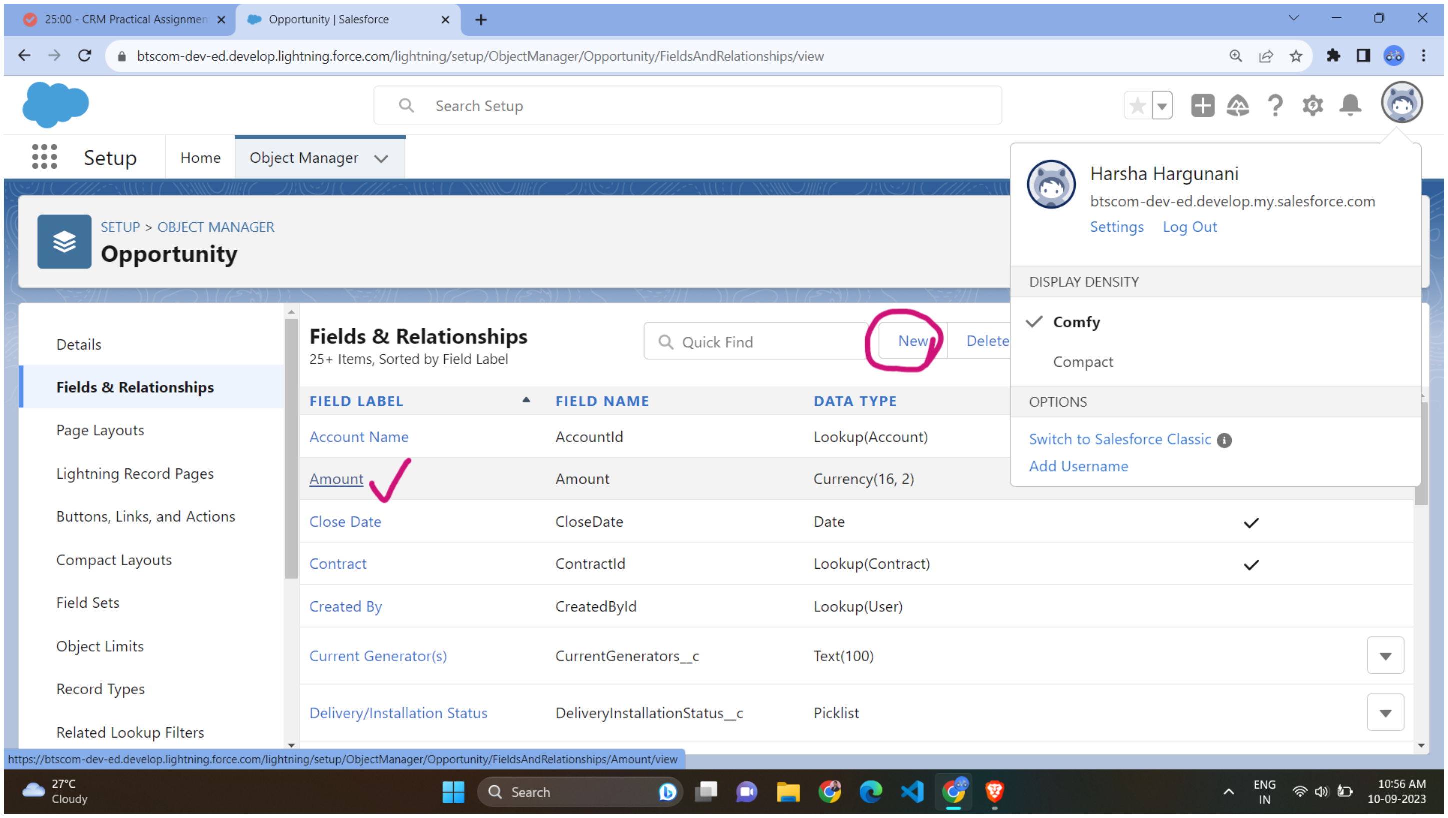
Q15. Show Account SLA at Opportunity, only if Account Rating is Cold and Opportunity Amount > 5000.

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.



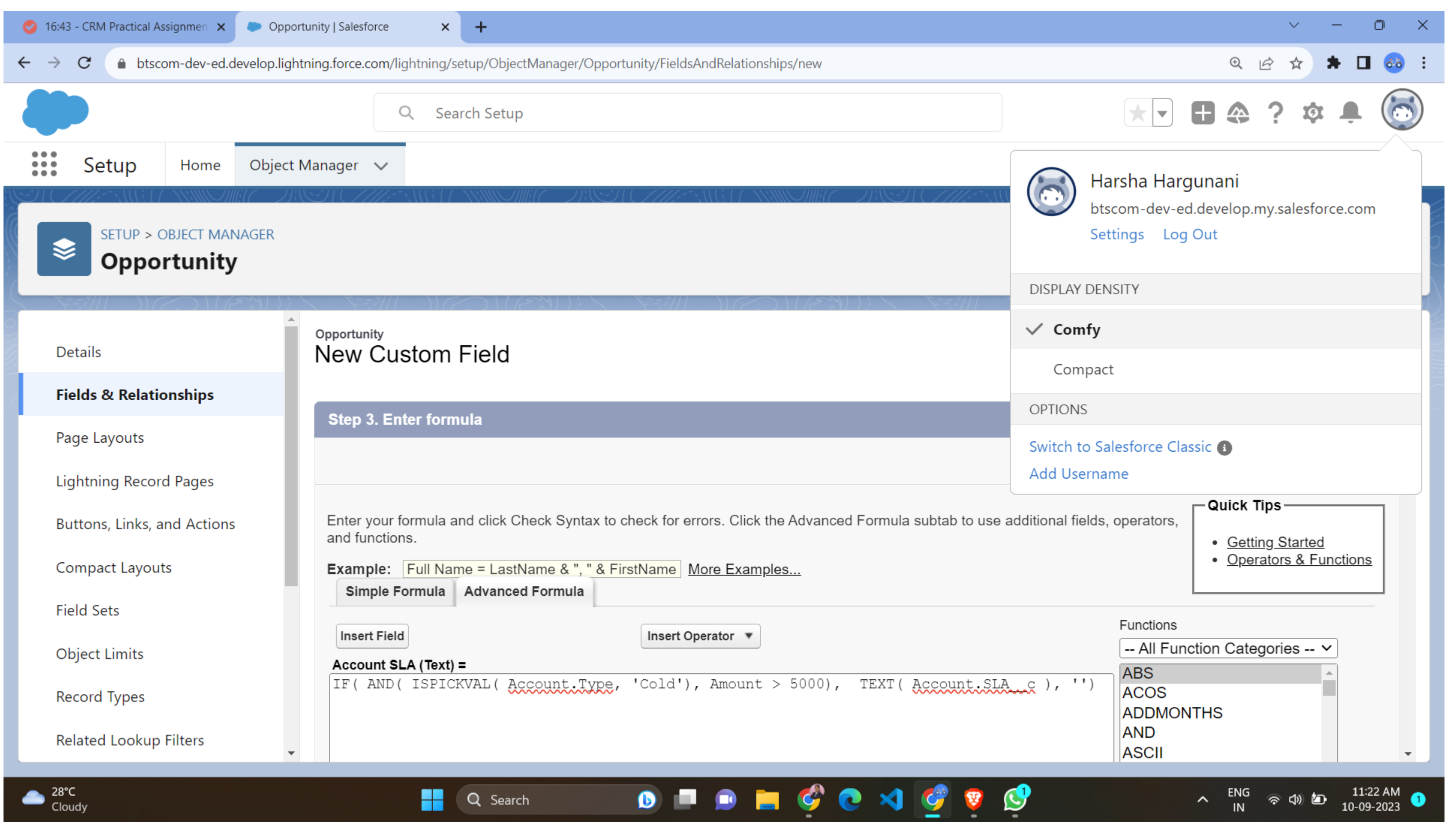
Step1: Setup | Object Manager | Quick Find Box - “opportunity”

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



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), '')



Step3: Check Syntax | Next | Next | Save.