

ASSIGNMENT

SUBMITTED BY

ABISHA.G

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

Setup Home Object Manager

Search Setup

SETUP
New Custom Object

Help for this Page

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 Required Information

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

Label Example: Account

Plural Label Example: Accounts

Starts with vowel sound ☐

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

Object Name Example: Account

Description

Context Sensitive Help Setting ☒ Open the standard Salesforce.com Help & Training window
☐ Open a window using a Visualforce page

Content Name

Enter Record Name Label and Format

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Content Name

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Setup

Home

Object Manager

Search Setup

Setup > OBJECT MANAGER

Nickname

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

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 Excel or another spreadsheet.

☐ Date

Allows users to enter a date or pick a date from a popup calendar.

☐ Date/Time

Allows users to enter a date and time, or pick a date and time from a popup calendar. When users click a date in the popup, that date and the current time are entered into the field.

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Nickname

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

Previous

Next

Cancel

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

Step 3 of 6

Previous

Next

Cancel

Field Label

Role

Field Name

Role

Description

Help Text

Child Relationship Name

Nicknames

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.

Lookup Filter

Optionally, create a filter to limit the records available to users in the lookup field. [Tell me more!](#)

Show Filter Settings

Setup

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Setup > OBJECT MANAGER

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Role

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

☐ 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.

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New Custom Field

Help for this Page

Step 2. Enter the details

Step 2 of 5

Field Label

RecordCount

Field Name

RecordCounts

Description

Help Text

Auto add to custom report type

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

Previous

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Cancel

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New Custom Field

Help for this Page

Step 3. Define the summary calculation

Step 3 of 5

Select Object to Summarize

Required Information

Master Object

Role

Summarized Object

Nicknames

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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Cancel

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Select Object to Summarize

Master Object

Role

Summarized Object

Nicknames

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	
Nickname	equals	0	AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND

WhatsApp

Role | Salesforce

Copilot (preview)

goodshepherdcollegeofengin8-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115j0000025UJ/FieldsAndRelationships/00N5j000005678h/view

Gmail

YouTube

Maps

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Role Custom Field

RecordCount

Back to Role

Custom Field Definition Detail

Edit

Set Field-Level Security

View Field Accessibility

Where is this used?

Field Information

Field Label	RecordCount	Object Name	Role
Field Name	RecordCount		
API Name	RecordCount__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Abisha G.	03/11/2023, 8:24 am	Modified By
			Abisha G.
			03/11/2023, 8:24 am

Roll-Up Summary Options

Data Type	Roll-Up Summary	Summary Type	COUNT
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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 th Security for the users

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with "PROF" and a list of items including "Users" and "Profiles". The main content area is titled "Clone Profile" and includes a sub-header "Clone Profile - Salesforce - Developer Edition" and a "Help for this Page" link. Below the header, there is a prompt "Enter the name of the new profile." and a message "You must select an existing profile to clone from." with a "Required Information" icon. The form fields are: "Existing Profile" (dropdown menu showing "Customer Community Login User"), "User License" (text field showing "Customer Community Login"), and "Profile Name" (text field showing "user a"). At the bottom of the form are "Save" and "Cancel" buttons.

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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.

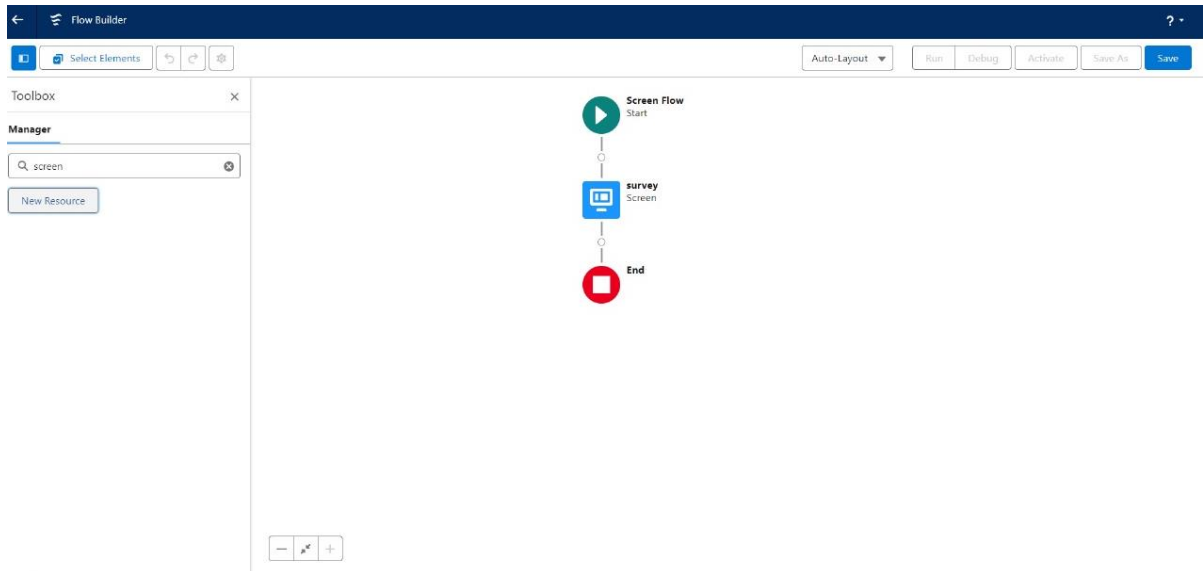
The first screenshot shows the 'Select Users to Assign' page in Salesforce Setup. The breadcrumb trail is '... > PERMISSION SET 'USER A' > MANAGE ASSIGNMENT EXPIRATION'. The page title is 'user A'. The left sidebar shows the navigation menu with 'Setup' selected. The main content area has a search bar and a table of users. The 'Security User' is selected.

	Full Name	Alias	Username	Role	Ac...	Profile
<input type="checkbox"/>	Chatter Exper	Chatter	chatty.00d5j00000d3k6seav.7eozx53qymc@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	Integration U:	integ	integration@00d5j00000d3k6seav.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input checked="" type="checkbox"/>	Security User	sec	insightssecurity@00d5j00000d3k6seav.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

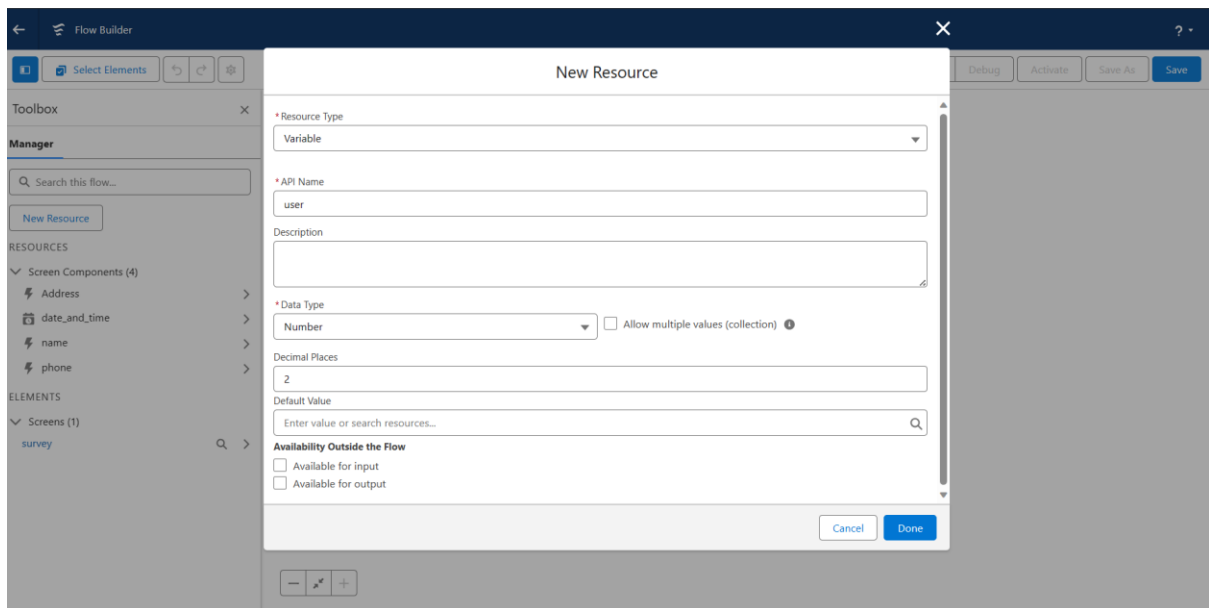
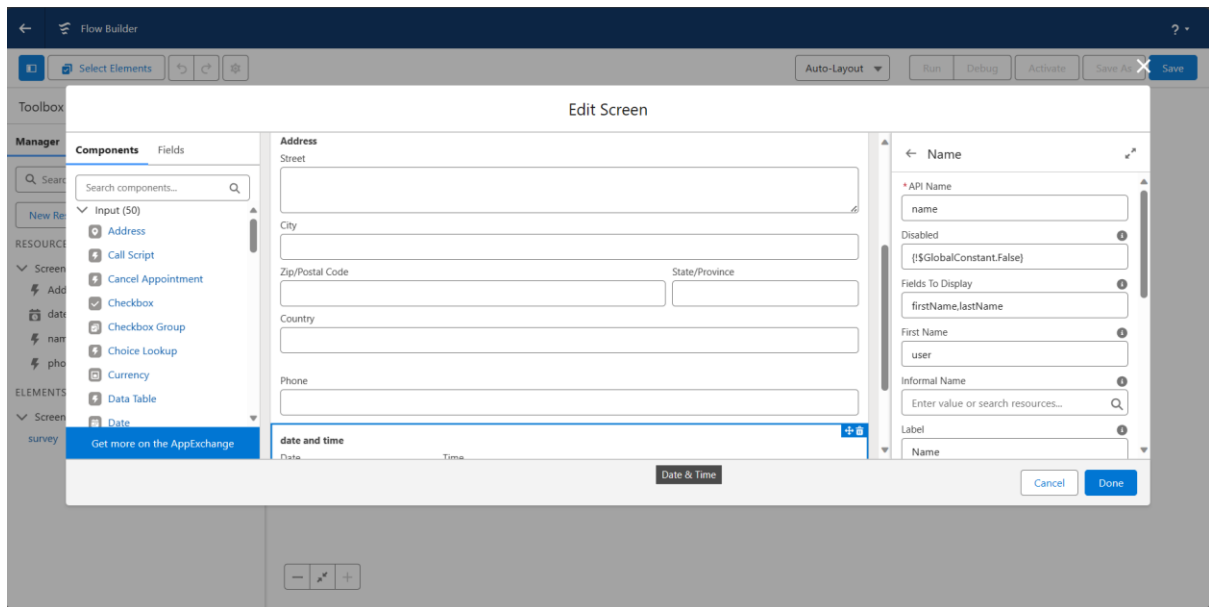
The second screenshot shows the 'Select an Expiration Option For Assigned Users' page. The breadcrumb trail is '... > PERMISSION SET 'USER A' > MANAGE ASSIGNMENT EXPIRATION'. The page title is 'user a'. The left sidebar shows the navigation menu with 'Setup' selected. The main content area has radio buttons for 'No expiration date' (selected) and 'Specify the expiration date'. Below the radio buttons are options for '1 Day', '1 Week', '30 Days', '60 Days', and 'Custom Date'. There is also a 'Time Zone' dropdown menu. Below these options is a table of selected users.

Full Name	Role	Profile	Active	User License	Expires On
Security User		Analytics Cloud Security User	<input checked="" type="checkbox"/>	Analytics Cloud Integration U...	Never Expires

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



The screenshot shows the 'Edit Screen' dialog box. The 'Components' tab is active, displaying a list of components on the left: 'Input (50)', 'Address', 'Call Script', 'Cancel Appointment', 'Checkbox', 'Checkbox Group', 'Choice Lookup', 'Currency', 'Data Table', and 'Date'. The 'Fields' tab is also visible, showing a list of fields: 'Name', 'First Name', 'Last Name', 'Address', 'Street', 'City', and 'Country'. The 'Name' field is selected, and its properties are shown on the right: 'API Name' (name), 'Disabled' ([GlobalConstant.False]), 'Fields To Display' (firstName, lastName), 'First Name' (user), 'Informal Name' (Enter value or search resources...), and 'Label' (Name). The 'Done' button is highlighted.



Flow Builder

survey - V1

✔ Your flow was activated.

?

Select Elements

Auto-Layout

Version 1: Active—Last modified a minute ago

Run

Debug

Deactivate

Save As

Save

Deactivate

Toolbox

Manager

Search this flow...

New Resource

RESOURCES

Screen Components (4)

Address

date_and_time

name

phone

Variables (1)

user

ELEMENTS

Screens (1)

survey

Screen Flow Start

survey Screen

End

—

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