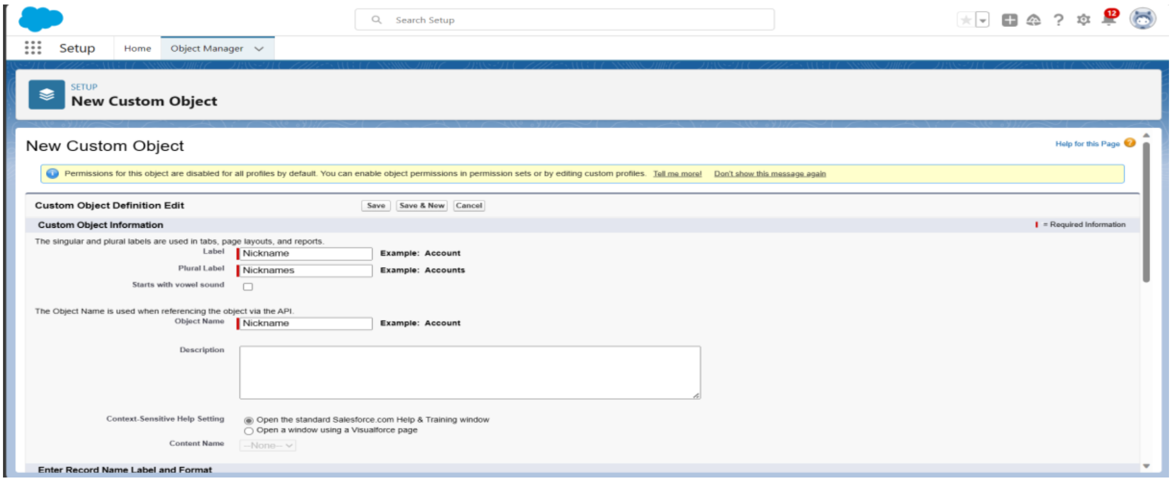
ASSIGNMENT

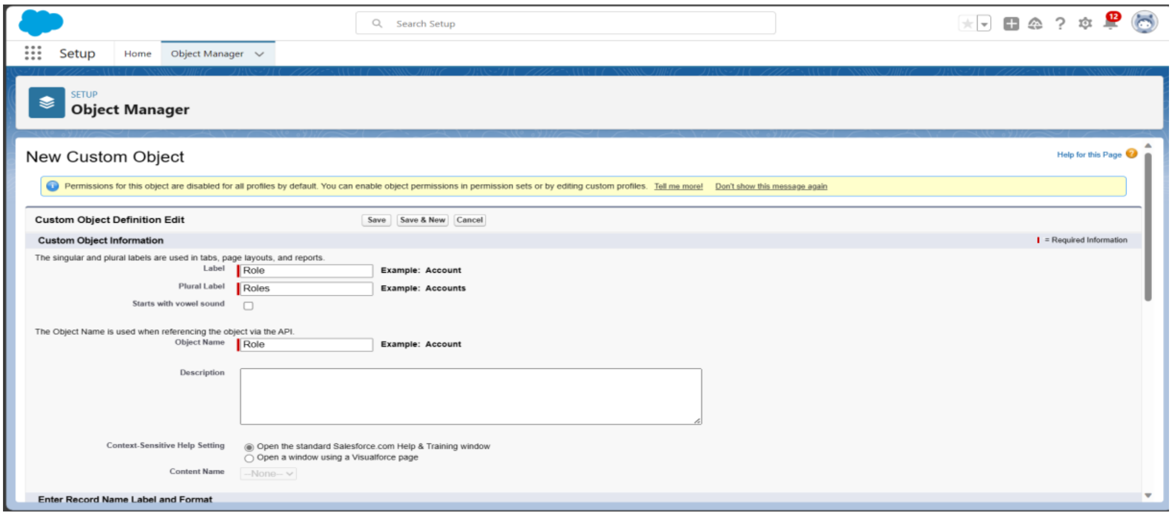
SUBMITTED BY

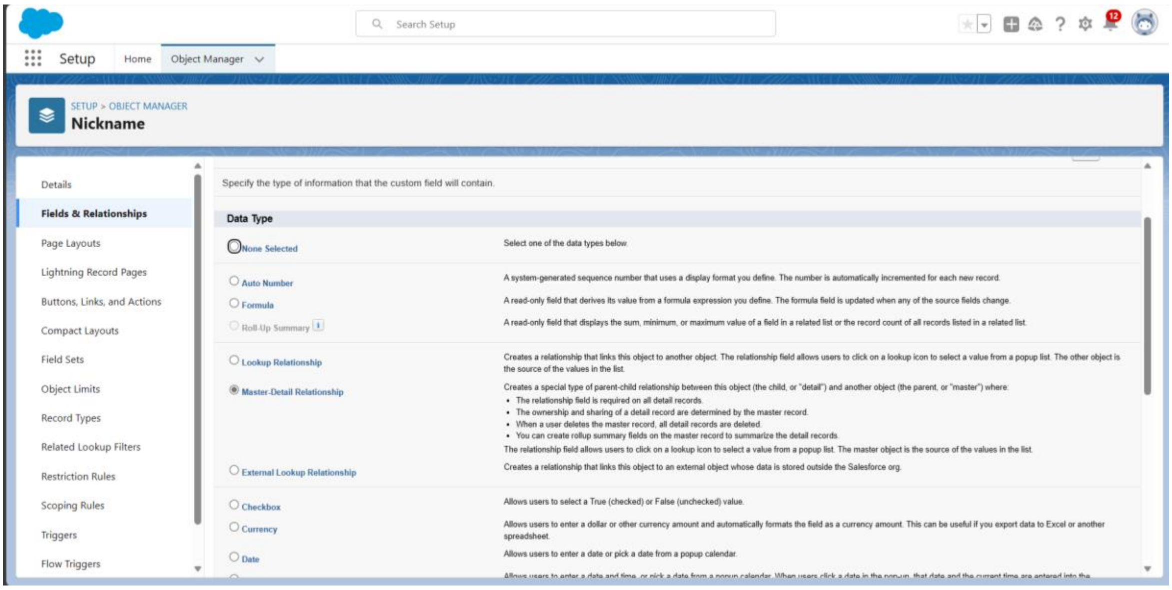
JENISHA.S.P

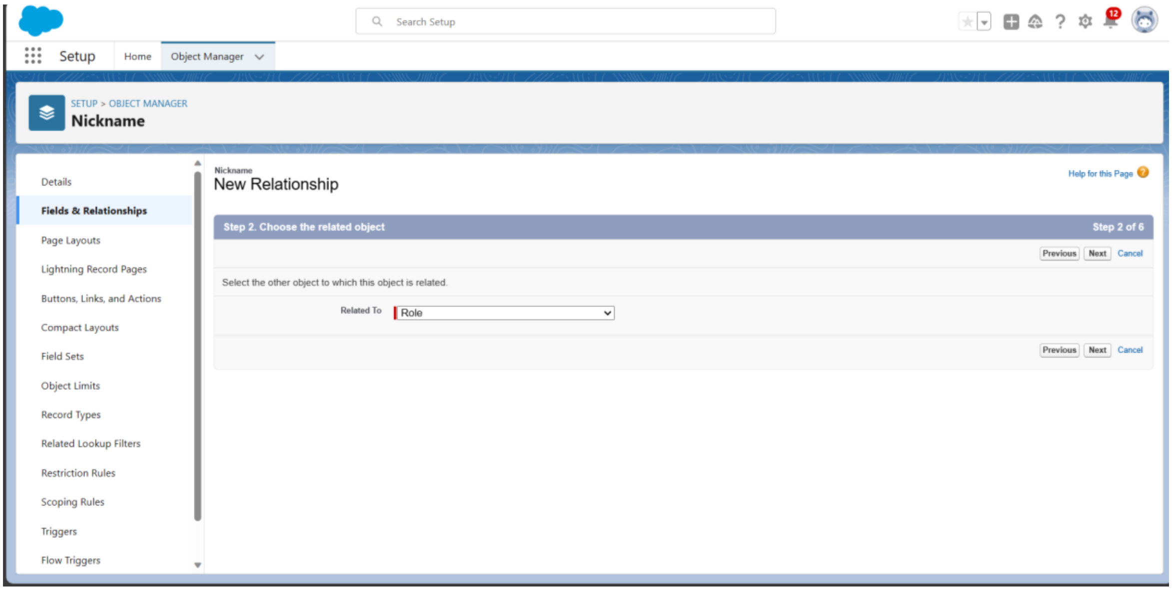
NMID:8D99B95DFB41C65BFA0448D80FBDCEE0

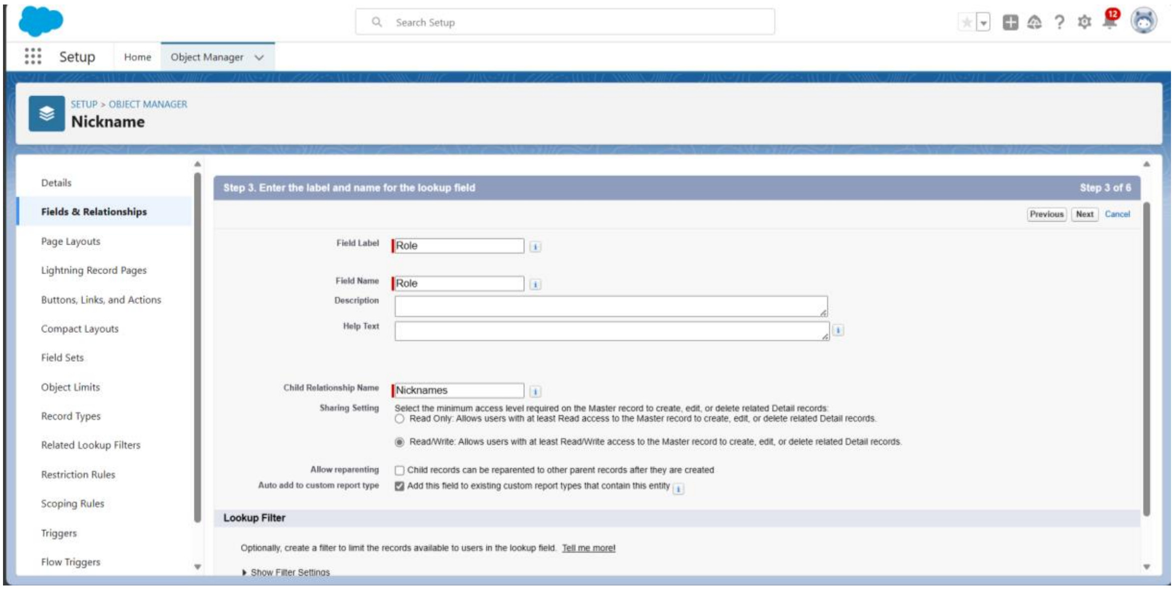
1.Create a Master-Detail Relationship between two Custom objects and also create a Roll Up Summary Field to Calculate total number of records.

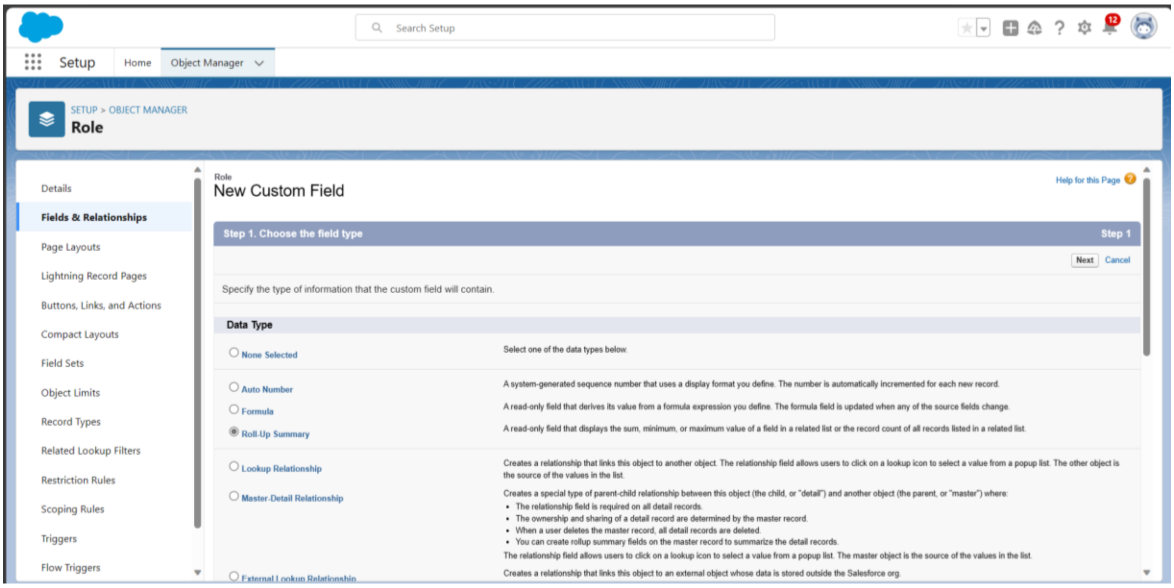





Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Nickname
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Triggers
Flow Triggers
Specify 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.


Search Setup
Setup
Home
Object Manager
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
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


Search Setup
Setup
Home
Object Manager
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
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


Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Role
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
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.
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
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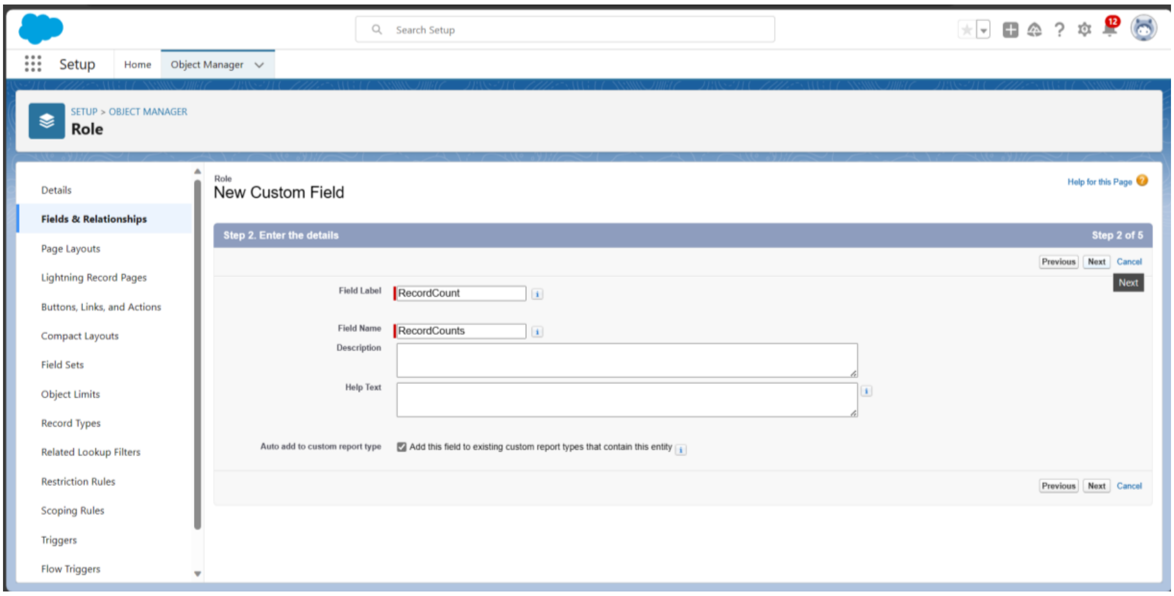
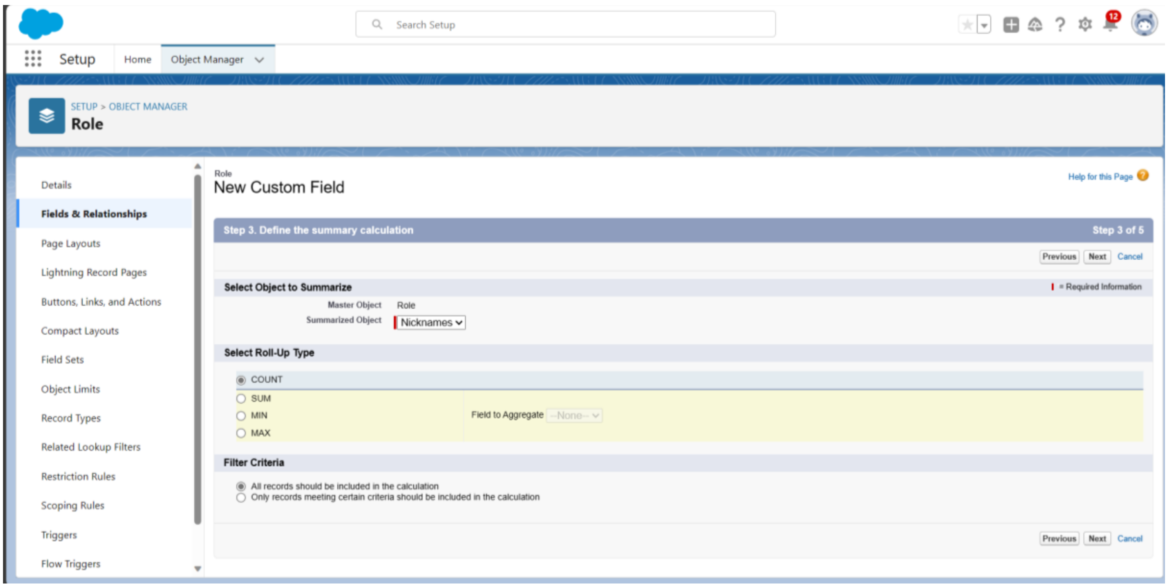
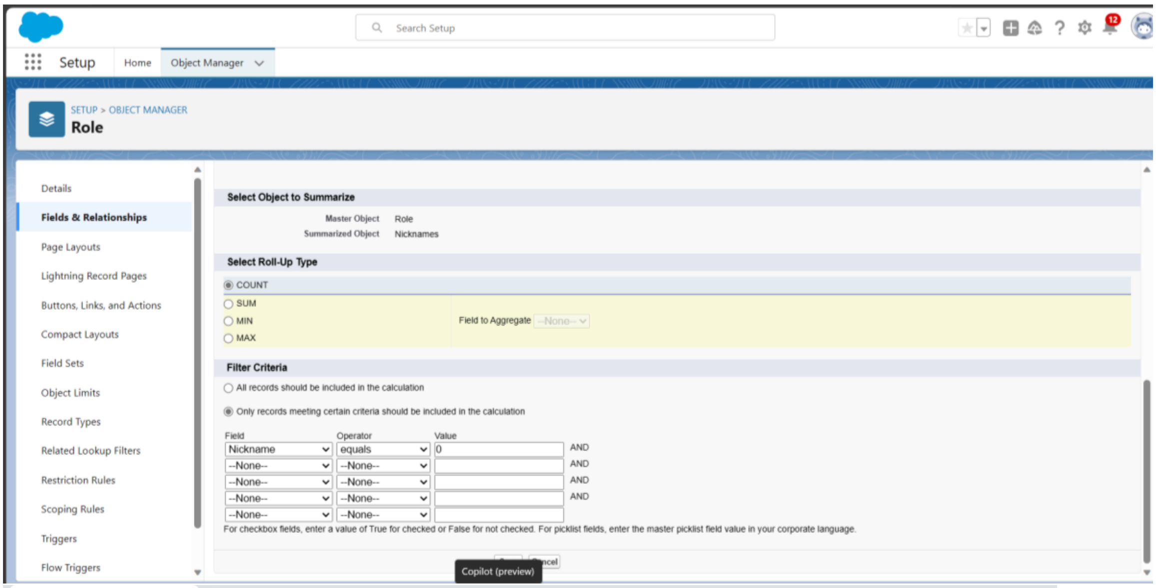
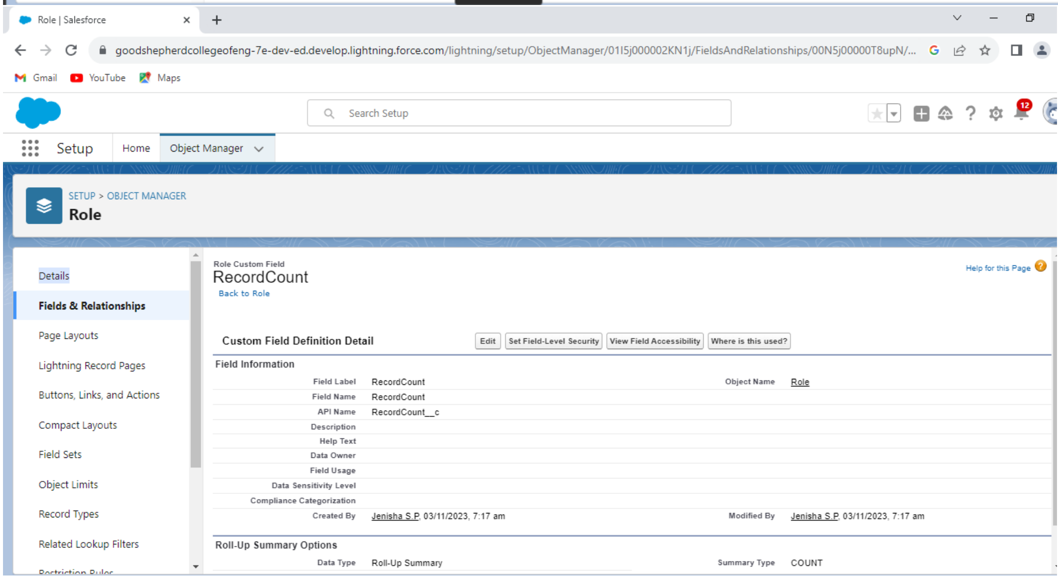
External Lookup Relationship
Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

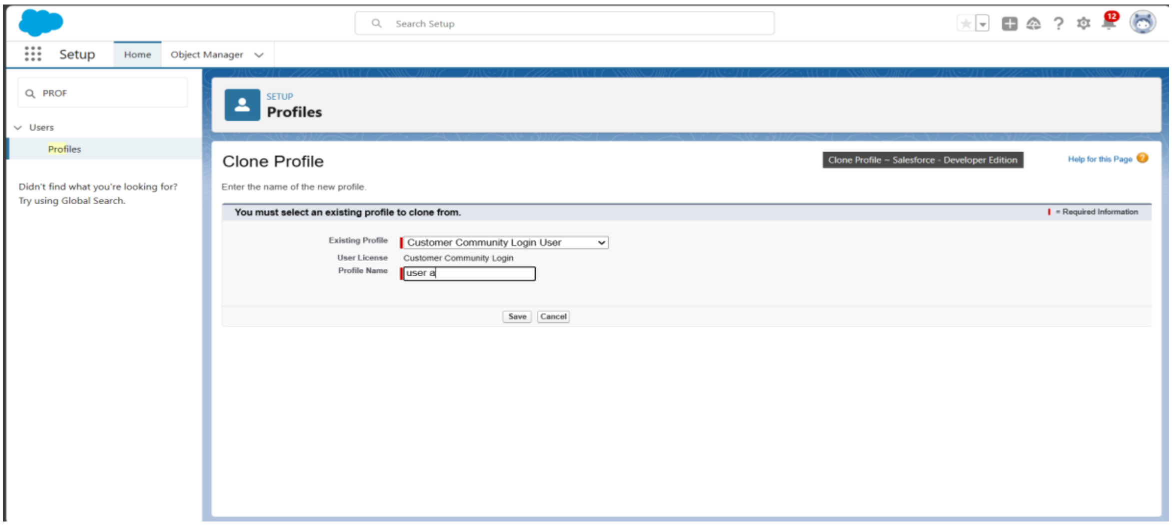

Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Role
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Triggers
Flow Triggers
Role
New Custom Field
Help for this Page
Step 2. Enter the details
Step 2 of 5
Previous Next Cancel
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

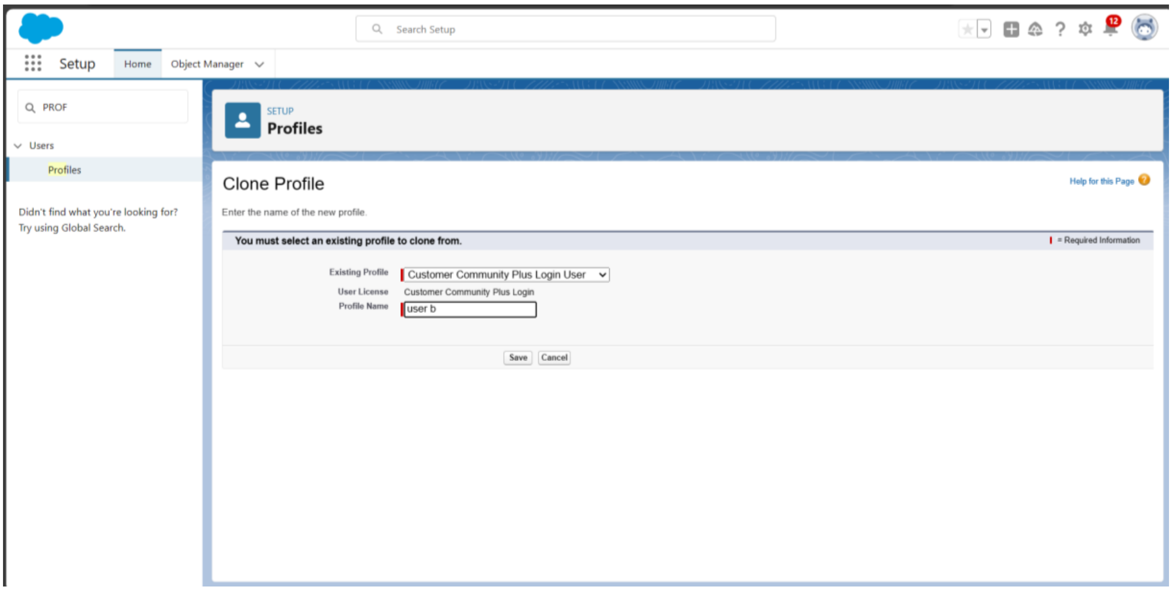

Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Role
New Custom Field
Help for this Page
Step 3. Define the summary calculation
Step 3 of 5
Previous Next Cancel
Select Object to Summarize
= Required Information
Master Object Role
Summarized Object Nicknames
Select Roll-Up Type
COUNT
SUM
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

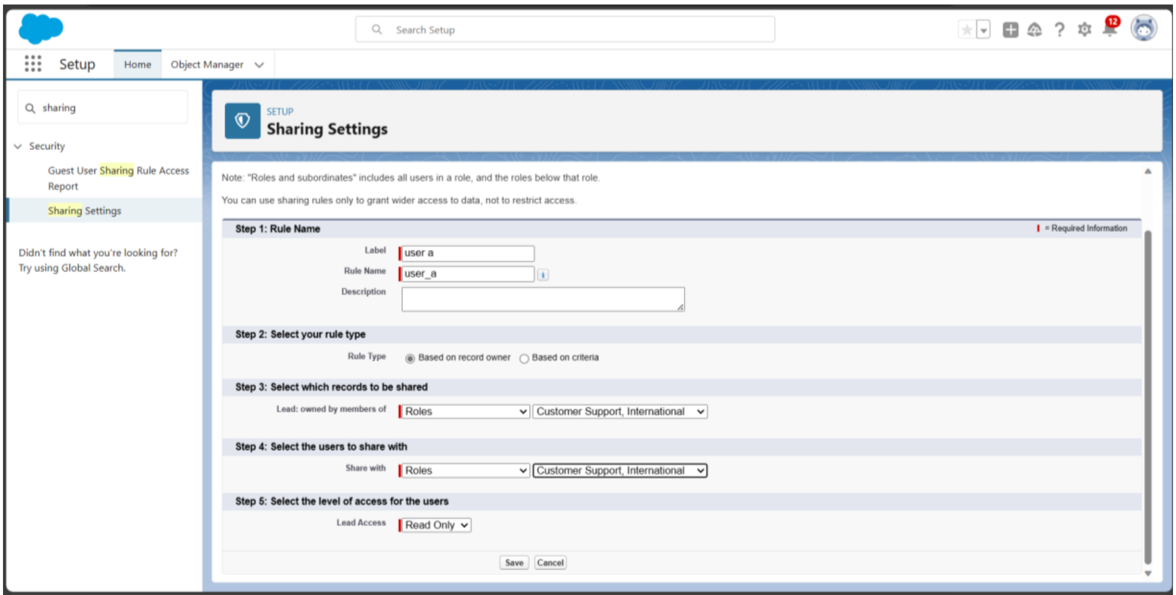




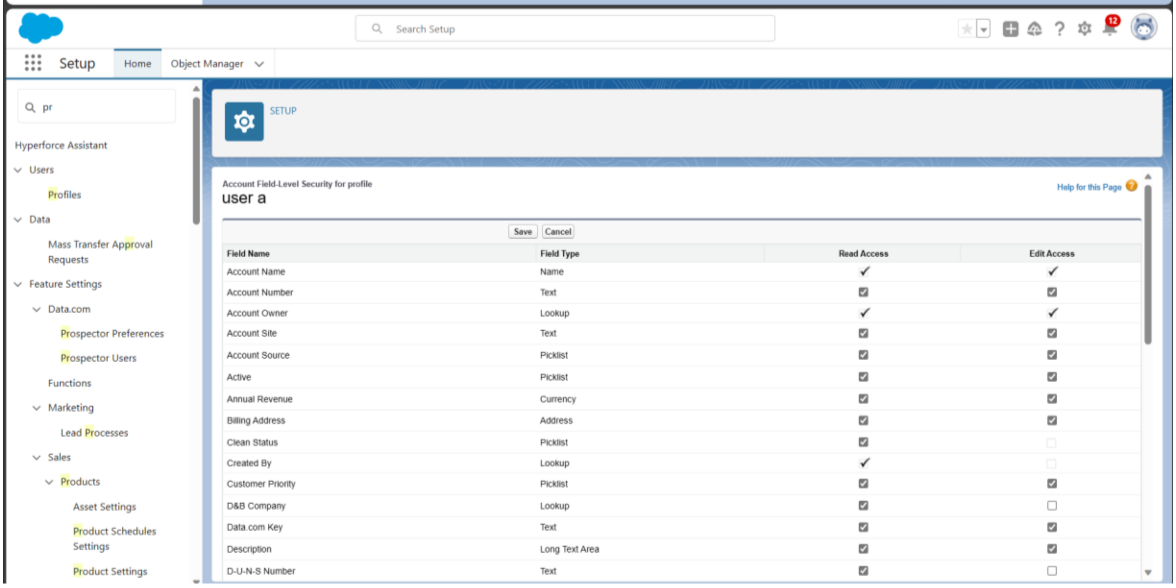
2. If there is 2 user, User A and User B in the organisation and we want in Account object that User A should not see the User B Record and user B should not see User A record then apply th Security for the users





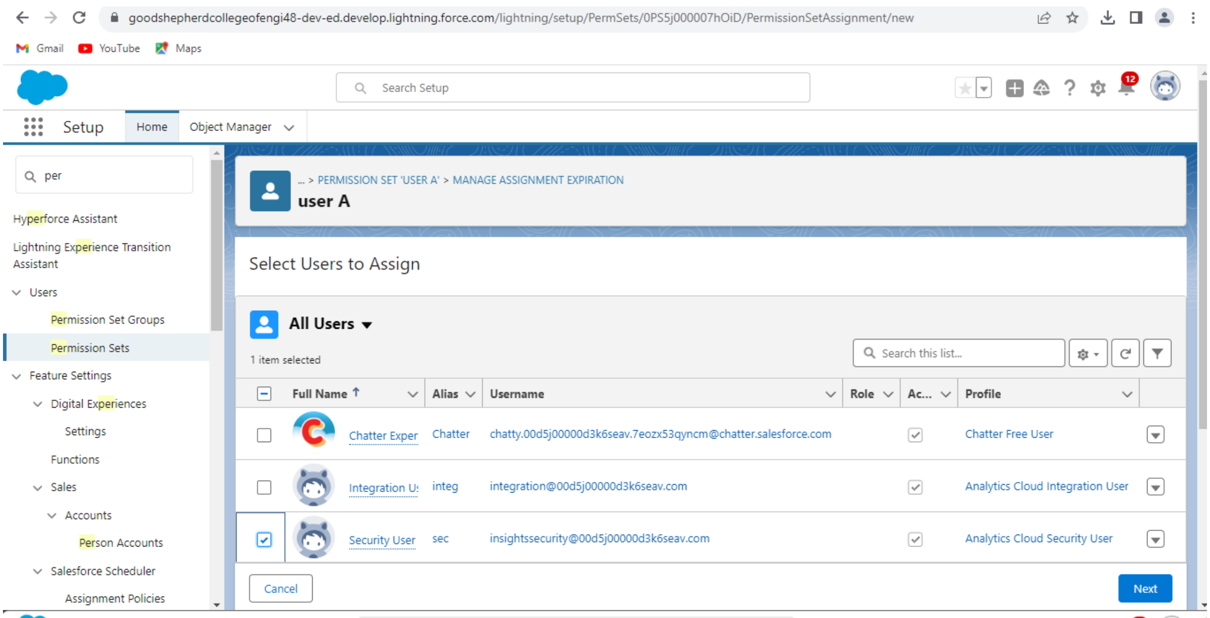


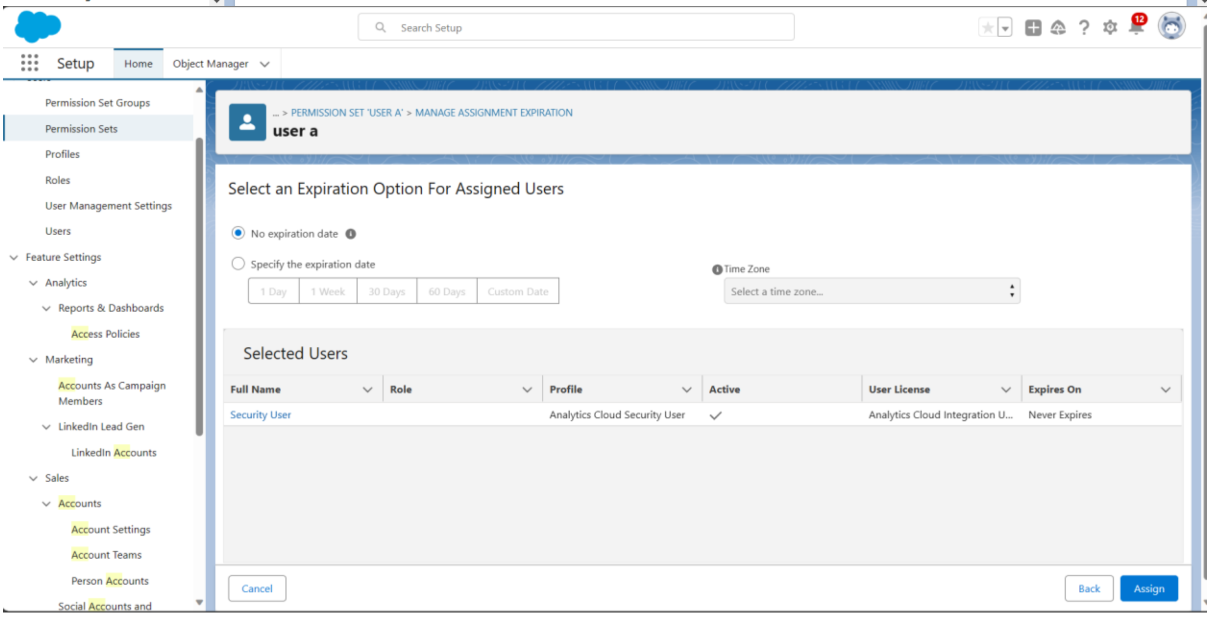
Search Setup
Setup
Home
Object Manager
sharing
Security
Guest User Sharing Rule Access Report
Sharing Settings
Didn't find what you're looking for? Try using Global Search.
SETUP
Sharing Settings
Note: "Roles and subordinates" includes all users in a role, and the roles below that role.
You can use sharing rules only to grant wider access to data, not to restrict access.
Step 1: Rule Name
= Required Information
Label
user a
Rule Name
user_a
Description
Step 2: Select your rule type
Rule Type
Based on record owner
Based on criteria
Step 3: Select which records to be shared
Lead: owned by members of
Roles
Customer Support, International
Step 4: Select the users to share with
Share with
Roles
Customer Support, International
Step 5: Select the level of access for the users
Lead Access
Read Only
Save
Cancel



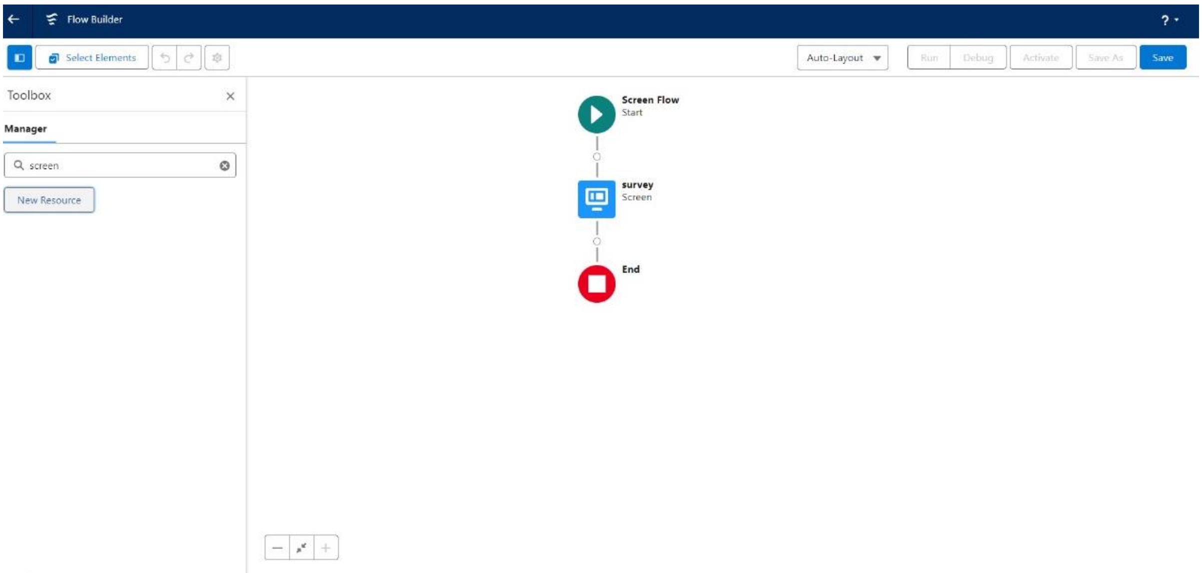
Search Setup
Setup
Home
Object Manager
pr
Hyperforce Assistant
Users
Profiles
Data
Mass Transfer Approval Requests
Feature Settings
Data.com
Prospector Preferences
Prospector Users
Functions
Marketing
Lead Processes
Sales
Products
Asset Settings
Product Schedules Settings
Product Settings
SETUP
Account Field-Level Security for profile
user a
Help for this Page
Save
Cancel
Field Name
Field Type
Read Access
Edit Access
Account Name
Name
Account Number
Text
Account Owner
Lookup
Account Site
Text
Account Source
Picklist
Active
Picklist
Annual Revenue
Currency
Billing Address
Address
Clean Status
Picklist
Created By
Lookup
Customer Priority
Picklist
D&B Company
Lookup
Data.com Key
Text
Description
Long Text Area
D-U-N-S Number
Text

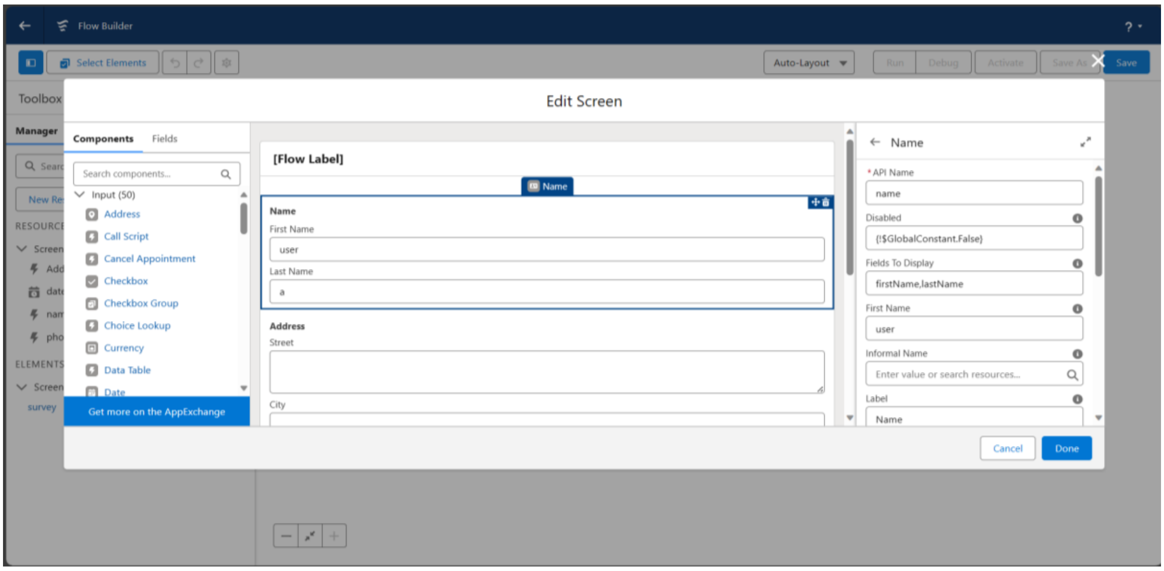
3. Suppose there are 2 Users and they are having Create, Read, Edit access on Account Object with the same profile but we want to open up the access for one user to delete how will you implement the Security setting.

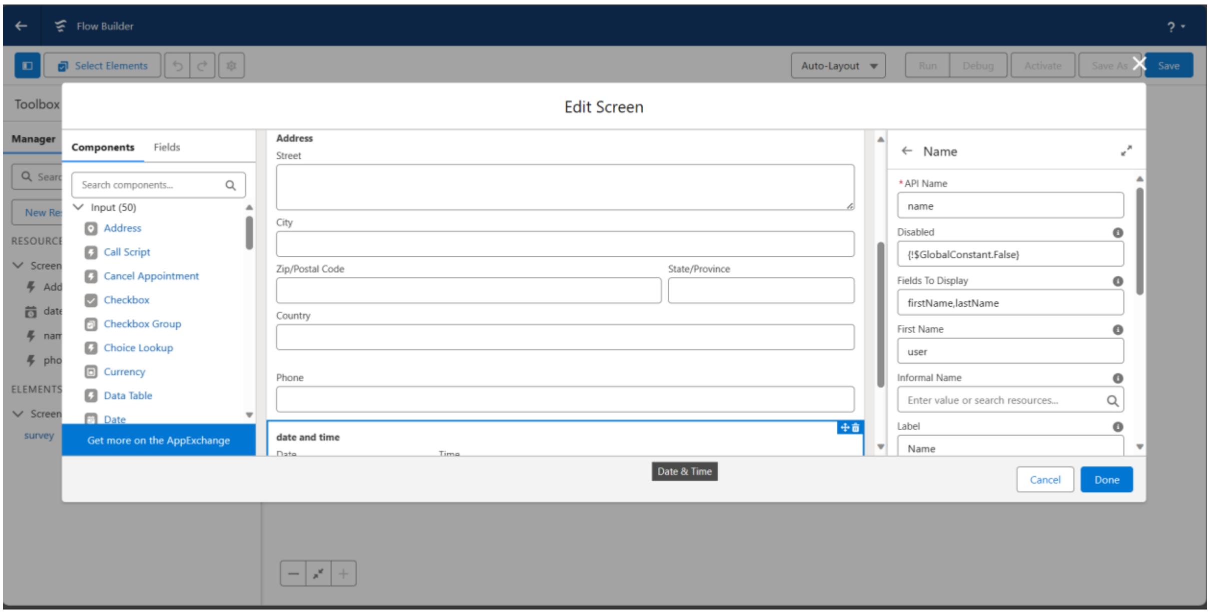


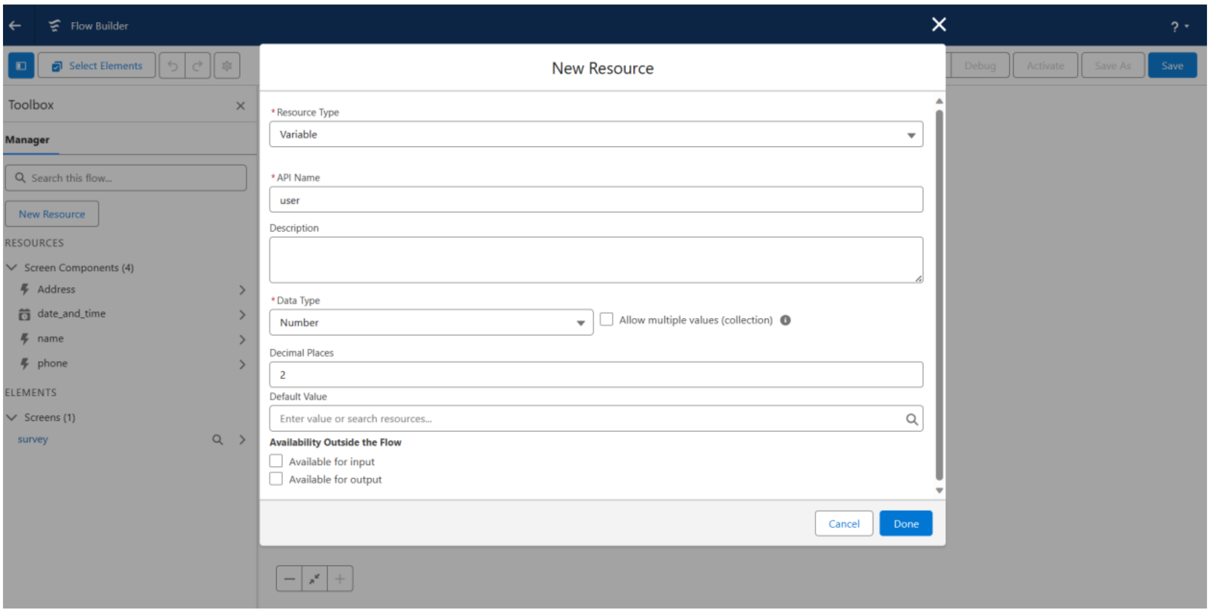


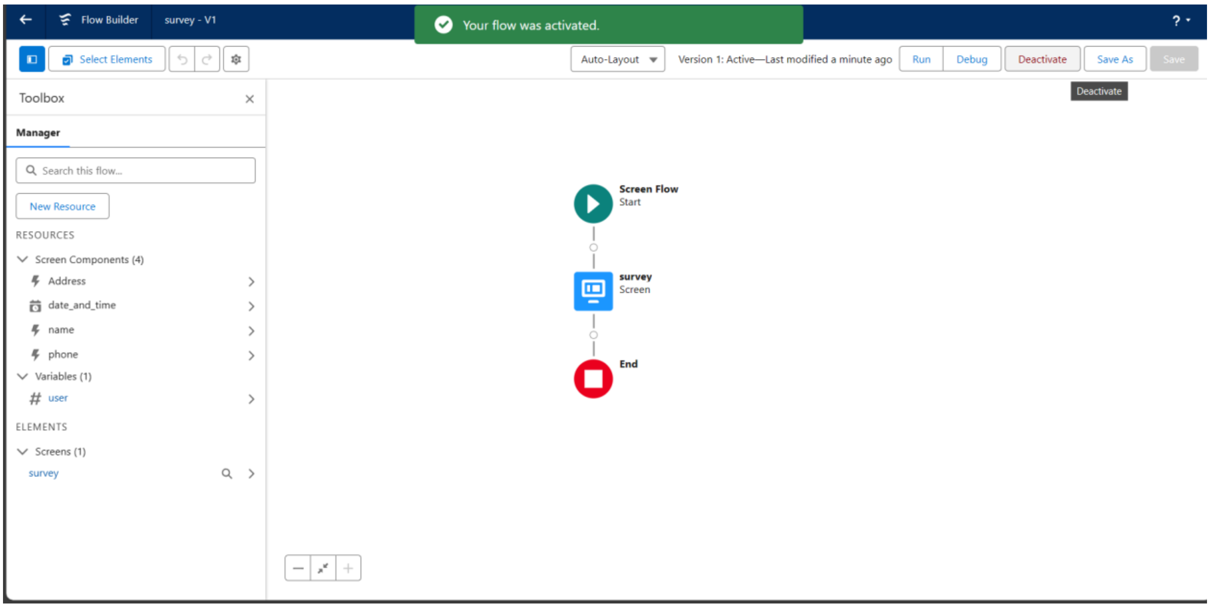
4.Create a screen flow for a basic survey to fill in the details for any form.






Flow Builder
Select Elements
Auto-Layout
Run
Debug
Activate
Save As
Save
Toolbox
Manager
Edit Screen
Components
Fields
Search components...
Input (50)
Address
Call Script
Cancel Appointment
Checkbox
Checkbox Group
Choice Lookup
Currency
Data Table
Date
Get more on the AppExchange
Address
Street
City
Zip/Postal Code
State/Province
Country
Phone
date and time
Date & Time
Name
API Name
name
Disabled
{!$GlobalConstant.False}
Fields To Display
firstName,lastName
First Name
user
Informal Name
Enter value or search resources...
Label
Name
Cancel
Done


Flow Builder
Select Elements
Debug
Activate
Save As
Save
Toolbox
Manager
Search this flow...
New Resource
RESOURCES
Screen Components (4)
Address
date_and_time
name
phone
ELEMENTS
Screens (1)
survey
New Resource
Resource Type
Variable
API Name
user
Description
Data Type
Number
Allow multiple values (collection)
Decimal Places
2
Default Value
Enter value or search resources...
Availability Outside the Flow
Available for input
Available for output
Cancel
Done


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