

# ASSIGNMENT

**SUBMITTED BY**

**AJINA.A.S**

**NMID: DB76A08BC362787AA634DD79BEDFD110**

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

The screenshot shows the Salesforce Setup interface for creating a new custom object. The page title is "New Custom Object". A yellow banner at the top states: "Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more!](#) [Don't show this message again](#)". Below the banner, the "Custom Object Definition Edit" section is active, showing "Save", "Save & New", and "Cancel" buttons. The "Custom Object Information" section contains the following fields:

- Label:** Nickname (Example: Account)
- Plural Label:** Nicknames (Example: Accounts)
- Starts with vowel sound:** ☐
- Object Name:** Nickname (Example: Account)
- Description:** (Empty text area)
- Context Sensitive Help Setting:** ☒ Open the standard Salesforce.com Help & Training window, ☐ Open a window using a Visualforce page
- Content Name:** --None--

At the bottom, there is a prompt: "Enter Record Name Label and Format".

This screenshot shows the same Salesforce Setup interface for creating a new custom object, but with the "Role" example selected. The fields are populated as follows:

- Label:** Role (Example: Account)
- Plural Label:** Roles (Example: Accounts)
- Starts with vowel sound:** ☐
- Object Name:** Role (Example: Account)
- Description:** (Empty text area)
- Context Sensitive Help Setting:** ☒ Open the standard Salesforce.com Help & Training window, ☐ Open a window using a Visualforce page
- Content Name:** --None--

The bottom prompt "Enter Record Name Label and Format" remains the same.

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.

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

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



Setup

Home

Object Manager

Role

Role

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

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Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Role

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

Next

Cancel

Setup

Home

Object Manager

Role

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 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

Previous

Next

Cancel

Setup

Home

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

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

AND

Nickname

equals

0

AND

--None--

--None--

AND

--None--

--None--

AND

--None--

--None--

AND

--None--

--None--

AND

For checkbox fields, enter a value of True for checked or False for not checked. For picklist fields, enter the master picklist field value in your corporate language.

salesforce login - Search

Role | Salesforce

https://goodshepherdcollegeofengis-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/015g000004TgHP/Fiel...

Setup

Home

Object Manager

Role

Details

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Lightning Record Pages

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Compact Layouts

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Record Types

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Restriction Rules

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

Alina A.S.

03/11/2023, 7:27 am

Modified By

Alina A.S.

03/11/2023, 7:27 am

Roll-Up Summary Options

Data Type

Roll-Up Summary

Summary Type

COUNT

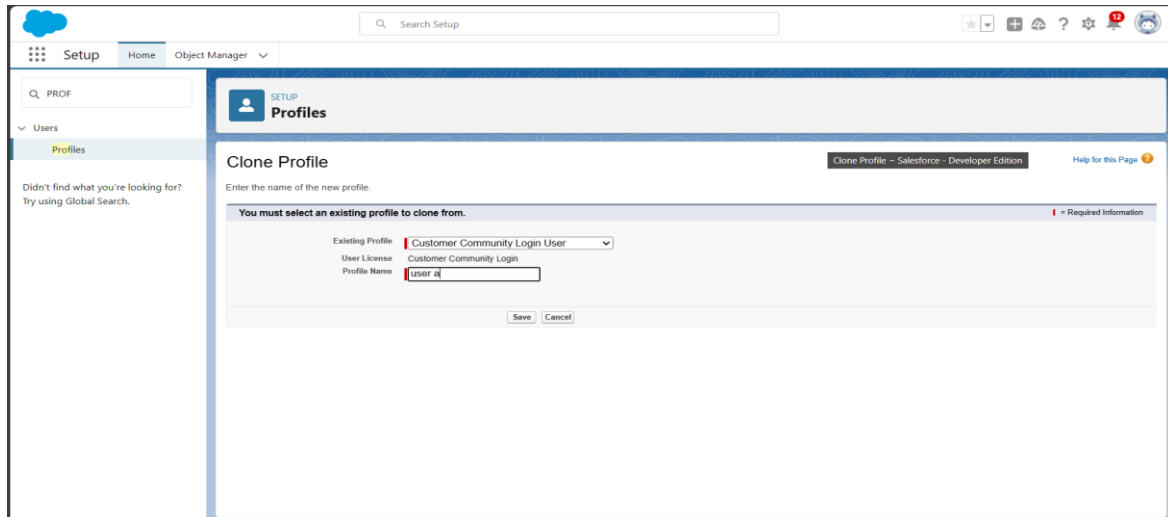
Summarized Object

Nickname

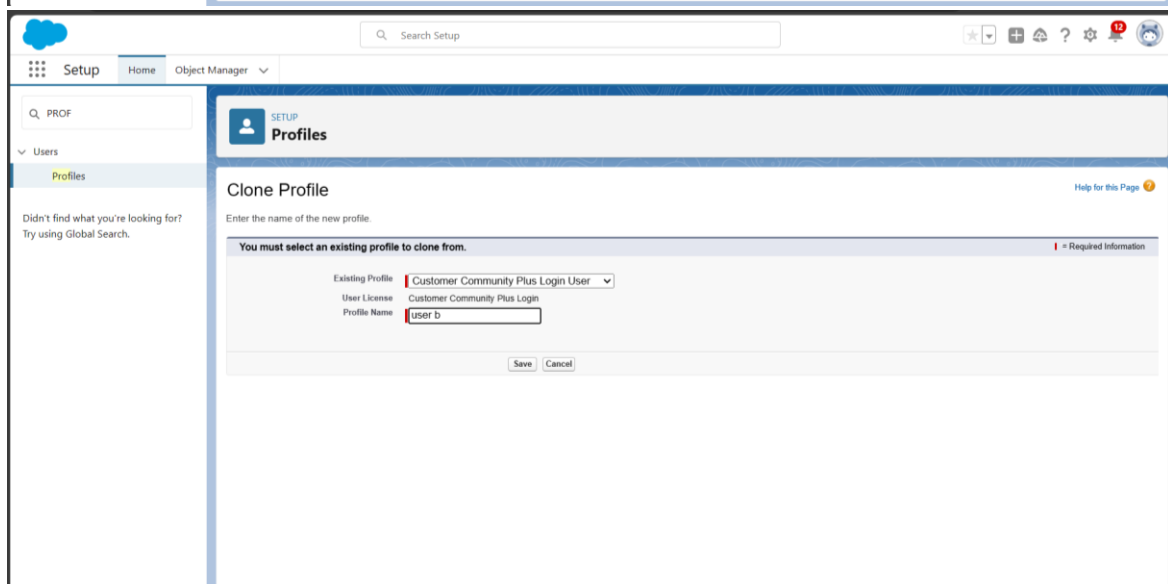
Filter Criteria

Nickname EQUALS 0

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



The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with "PROF" and a "Users" section with a "Profiles" link. The main content area is titled "Clone Profile" and includes a "Clone Profile - Salesforce - Developer Edition" badge and a "Help for this Page" link. Below the title, it says "Enter the name of the new profile." and "You must select an existing profile to clone from." with a red exclamation mark and "Required Information" link. 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"). There are "Save" and "Cancel" buttons at the bottom.



The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with "PROF" and a "Users" section with a "Profiles" link. The main content area is titled "Clone Profile" and includes a "Clone Profile - Salesforce - Developer Edition" badge and a "Help for this Page" link. Below the title, it says "Enter the name of the new profile." and "You must select an existing profile to clone from." with a red exclamation mark and "Required Information" link. The form fields are: "Existing Profile" (dropdown menu showing "Customer Community Plus Login User"), "User License" (text field showing "Customer Community Plus Login"), and "Profile Name" (text field showing "User b"). There are "Save" and "Cancel" buttons at the bottom.

Setup

Home

Object Manager

Search Setup

Star

Grid

Home

Help

Settings

1

Profile

Q 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

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

Setup

Home

Object Manager

Search Setup

Star

Grid

Home

Help

Settings

1

Profile

Q 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

Save Cancel

Field Name	Field Type	Read Access	Edit Access
Account Name	Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Account Number	Text	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Account Owner	Lookup	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Account Site	Text	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Account Source	Picklist	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Active	Picklist	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Annual Revenue	Currency	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Billing Address	Address	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Clean Status	Picklist	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Created By	Lookup	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Customer Priority	Picklist	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
D&B Company	Lookup	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Data.com Key	Text	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Description	Long Text Area	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
D-U-N-S Number	Text	<input checked="" type="checkbox"/>	<input type="checkbox"/>



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.

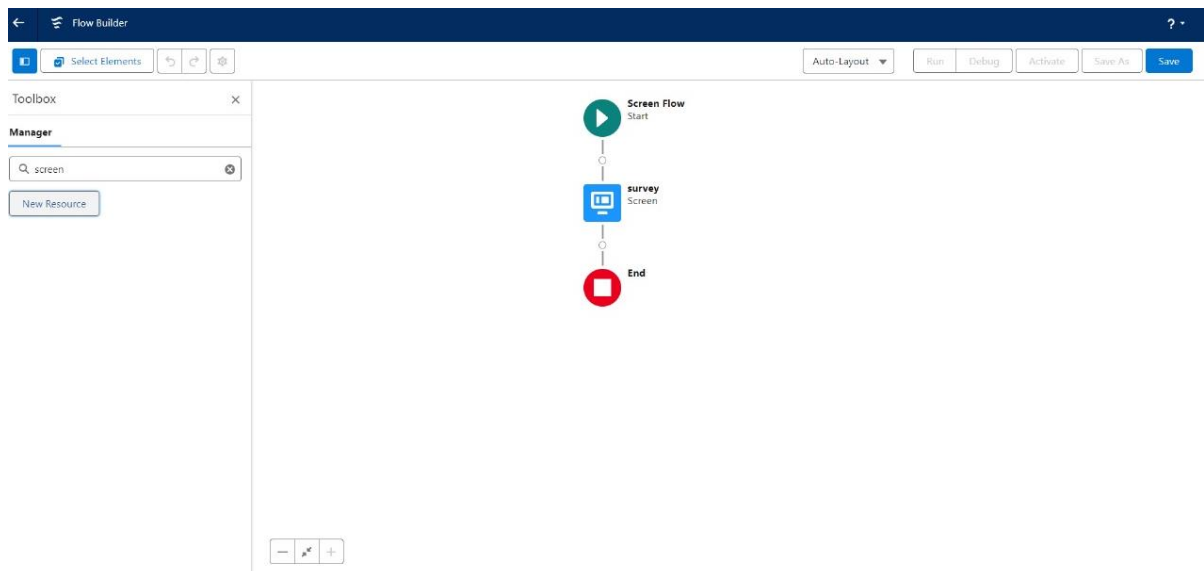
The first screenshot shows the 'Select Users to Assign' screen in Salesforce Setup. The breadcrumb trail is: ... > PERMISSION SET 'USER A' > MANAGE ASSIGNMENT EXPIRATION. The page title is 'user A'. The left sidebar shows the navigation menu with 'Permission Sets' selected. The main content area shows a list of users to assign. One user, 'Security User', is selected.

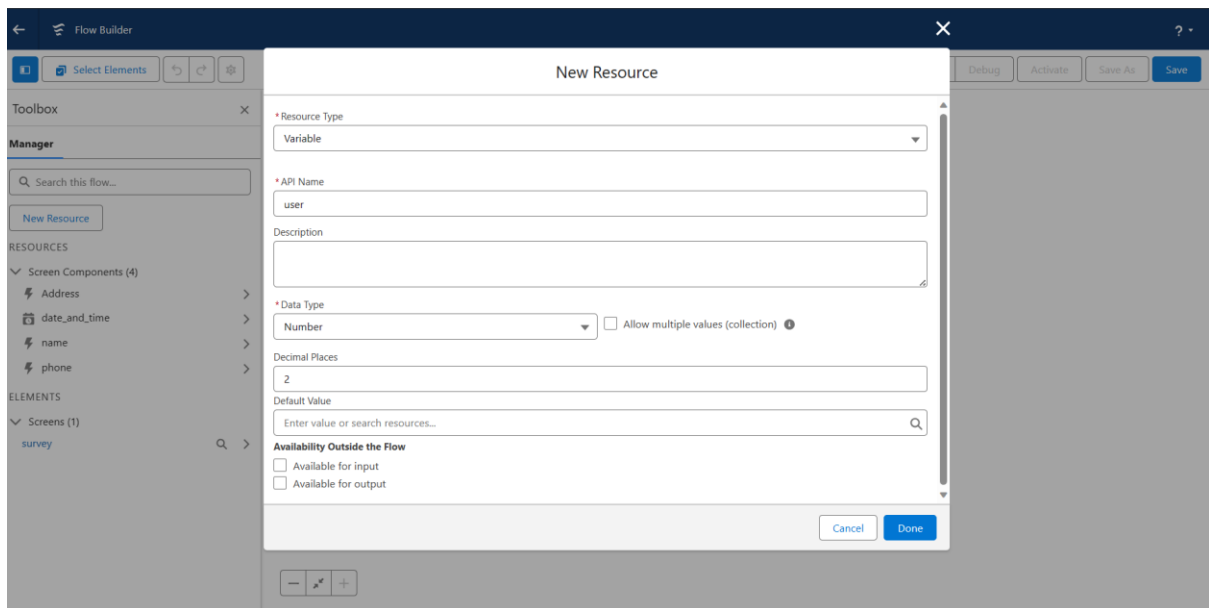
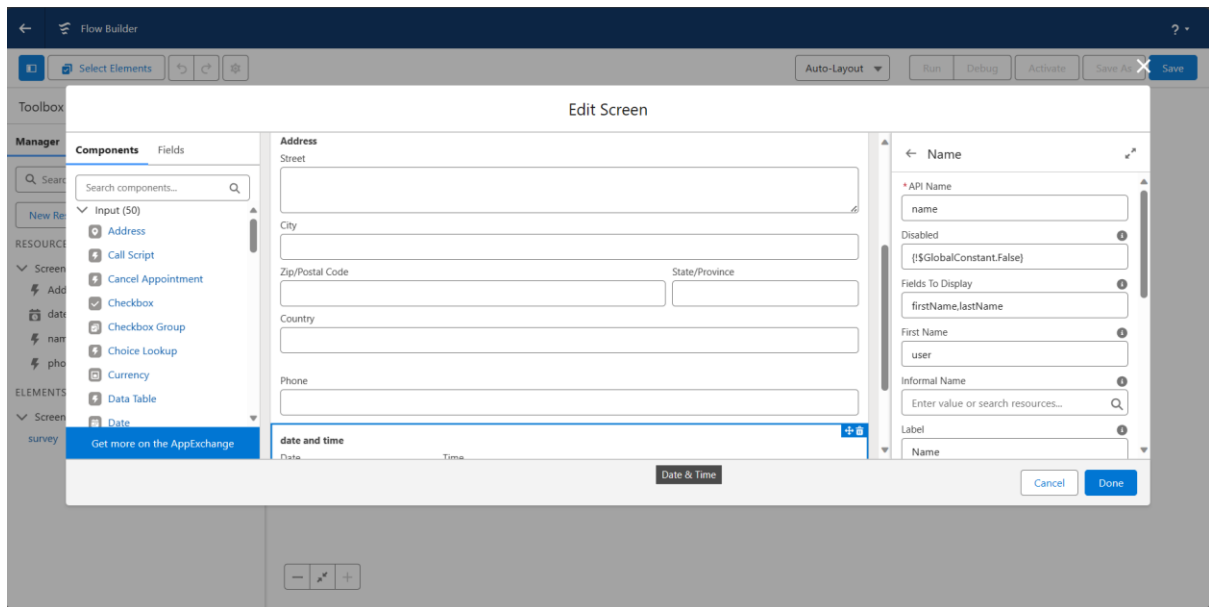
	Full Name	Alias	Username	Role	Ac...	Profile
<input type="checkbox"/>	Chatter Exper	Chatter	chatty.00d5j00000d3k6seav.7eozx53qymc@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	Integration U:	integ	integration@00d5j00000d3k6seav.com		<input checked="" 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' screen. 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 'Permission Sets' selected. The main content area shows options for expiration date and time zone. The 'No expiration date' option is selected. Below, a table shows the 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.





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

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

Deactivate