

ASSIGNMENT

SUBMITTED BY

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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 Nickname Example: Account

Plural Label Nicknames Example: Accounts

Starts with vowel sound ☐

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

Object Name Nickname Example: Account

Description

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

Content Name None

Enter Record Name Label and Format

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SETUP
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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 Role Example: Account

Plural Label Roles Example: Accounts

Starts with vowel sound ☐

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

Object Name Role Example: Account

Description

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

Content Name None

Enter Record Name Label and Format

Setup

Home

Object Manager

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Setup > OBJECT MANAGER

Nickname

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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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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.

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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

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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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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	
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.

Copilot (preview)

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Record Custom Field

RecordCount

Back to Role

Custom Field Definition Detail

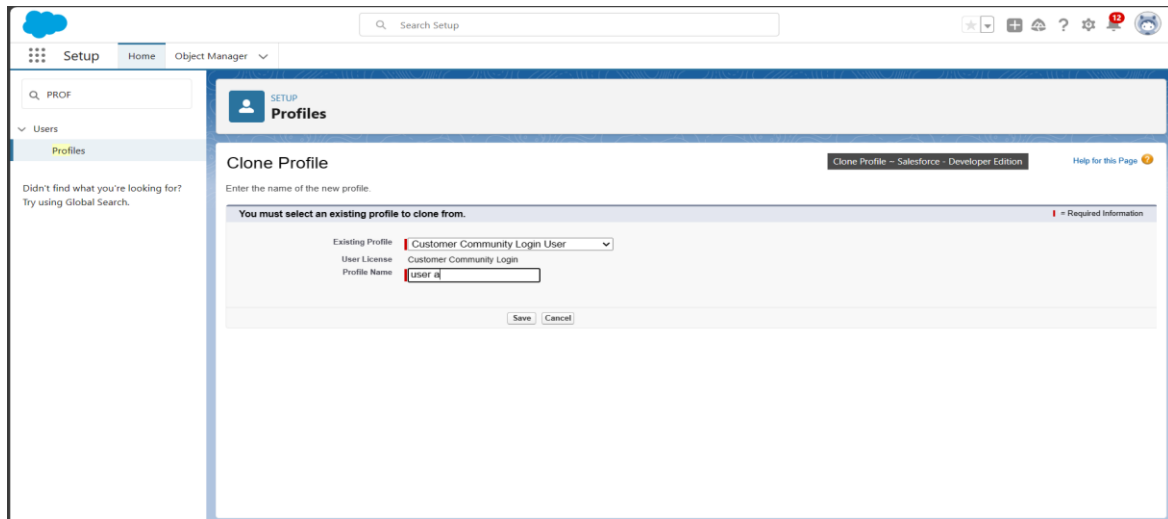
Field Information

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	Krishna Priya G.	Created On	03/11/2023, 8:09 am
Modified By	Krishna Priya G.	Modified On	03/11/2023, 8:09 am

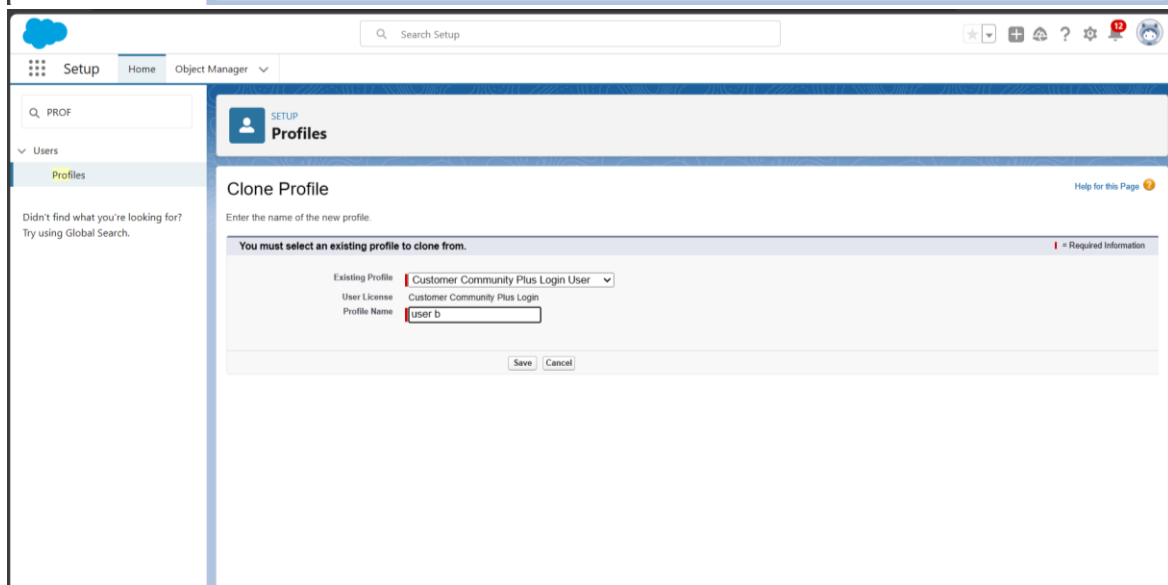
Roll-Up Summary Options

Data Type	Roll-Up Summary	Summary Type	COUNT
Summarized Object	NICKNAMES		
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 list with "Users" and "Profiles" (selected). The main content area is titled "Clone Profile" with a subtitle "Enter the name of the new profile." and a link "Clone Profile - Salesforce - Developer Edition". A message states "You must select an existing profile to clone from." Below this, a form shows "Existing Profile" as "Customer Community Login User", "User License" as "Customer Community Login", and "Profile Name" as "User a". "Save" and "Cancel" buttons are at the bottom.



The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with "PROF" and a list with "Users" and "Profiles" (selected). The main content area is titled "Clone Profile" with a subtitle "Enter the name of the new profile." and a link "Help for this Page". A message states "You must select an existing profile to clone from." Below this, a form shows "Existing Profile" as "Customer Community Plus Login User", "User License" as "Customer Community Plus Login", and "Profile Name" as "User b". "Save" and "Cancel" buttons are at the bottom.

Setup

Home

Object Manager

Search Setup

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

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Search Setup

Q pr

Hyperforce Assistant

Users

Profiles

Data

Mass Transfer Approval Requests

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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.

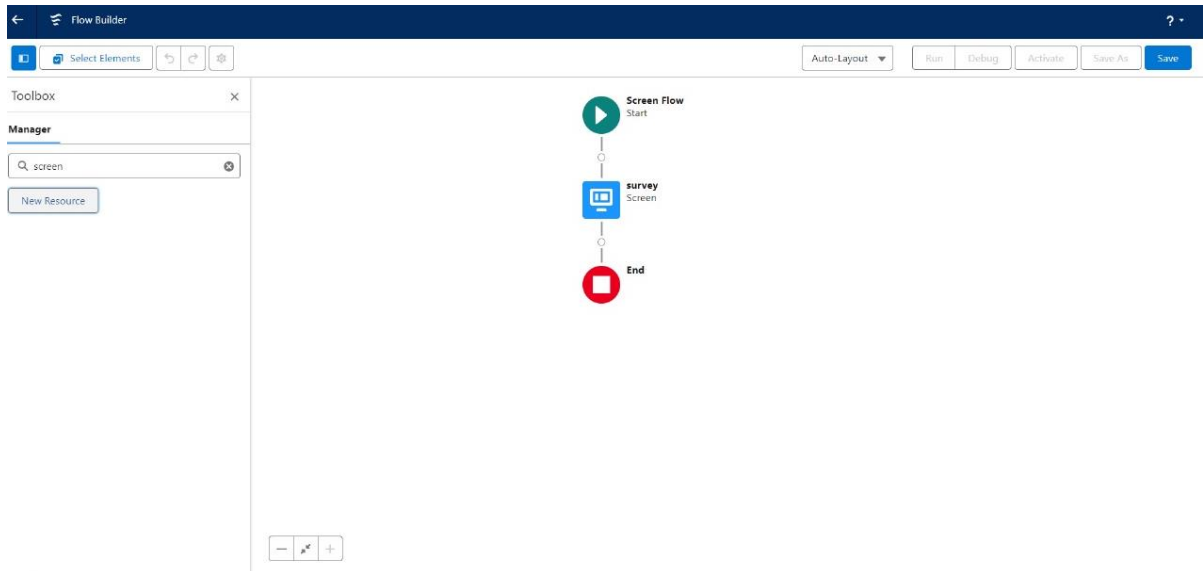
The first screenshot shows the 'Select Users to Assign' page in Salesforce Setup. The breadcrumb trail is '... > PERMISSION SET 'USER A' > MANAGE ASSIGNMENT EXPIRATION'. The page title is 'user A'. The left sidebar shows the navigation menu with 'Permission Sets' selected. The main content area shows a list of users to assign. The 'All Users' dropdown is expanded, showing 1 item selected. The table below lists the users:

	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

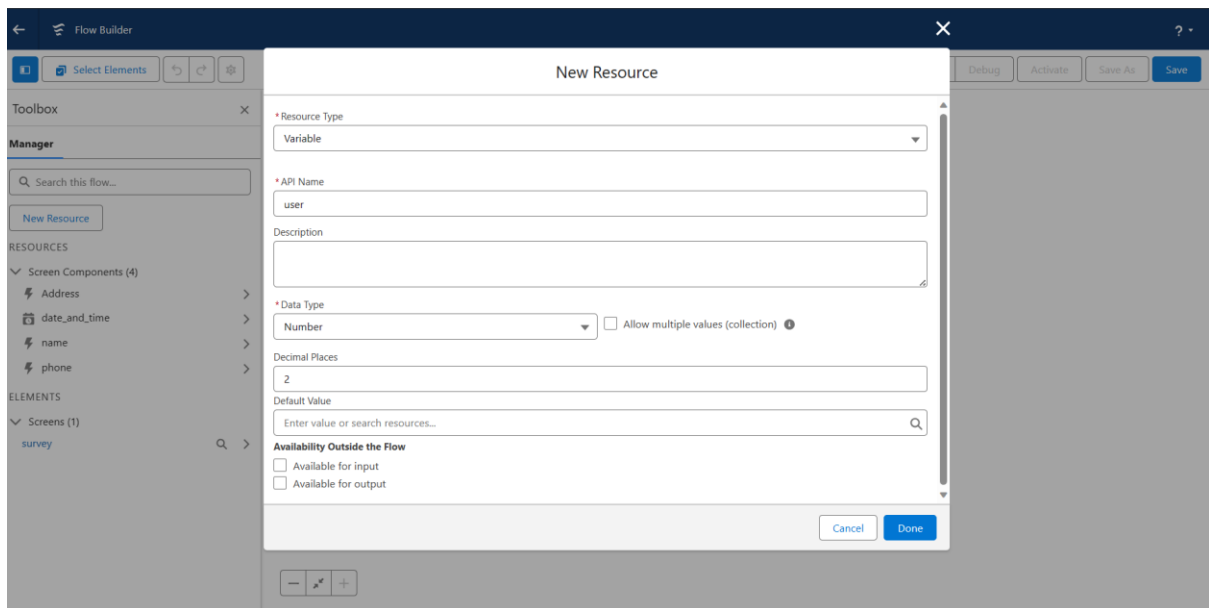
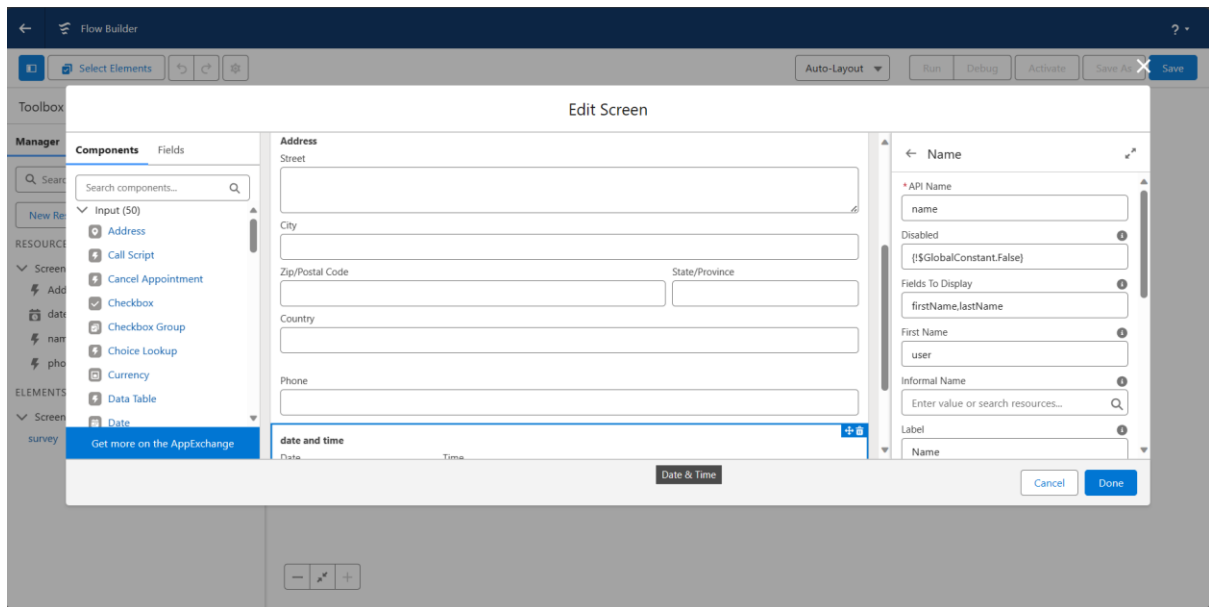
The second screenshot shows the 'Select an Expiration Option For Assigned Users' page. The breadcrumb trail is '... > PERMISSION SET 'USER A' > MANAGE ASSIGNMENT EXPIRATION'. The page title is 'user a'. The left sidebar shows the navigation menu with 'Permission Sets' selected. The main content area shows options for selecting an expiration date and a time zone. The 'No expiration date' option is selected. The 'Specify the expiration date' option is also visible with buttons for '1 Day', '1 Week', '30 Days', '60 Days', and 'Custom Date'. The 'Time Zone' dropdown is set to 'Select a time zone...'. Below these options is a table titled 'Selected Users' showing the details of the selected user:

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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