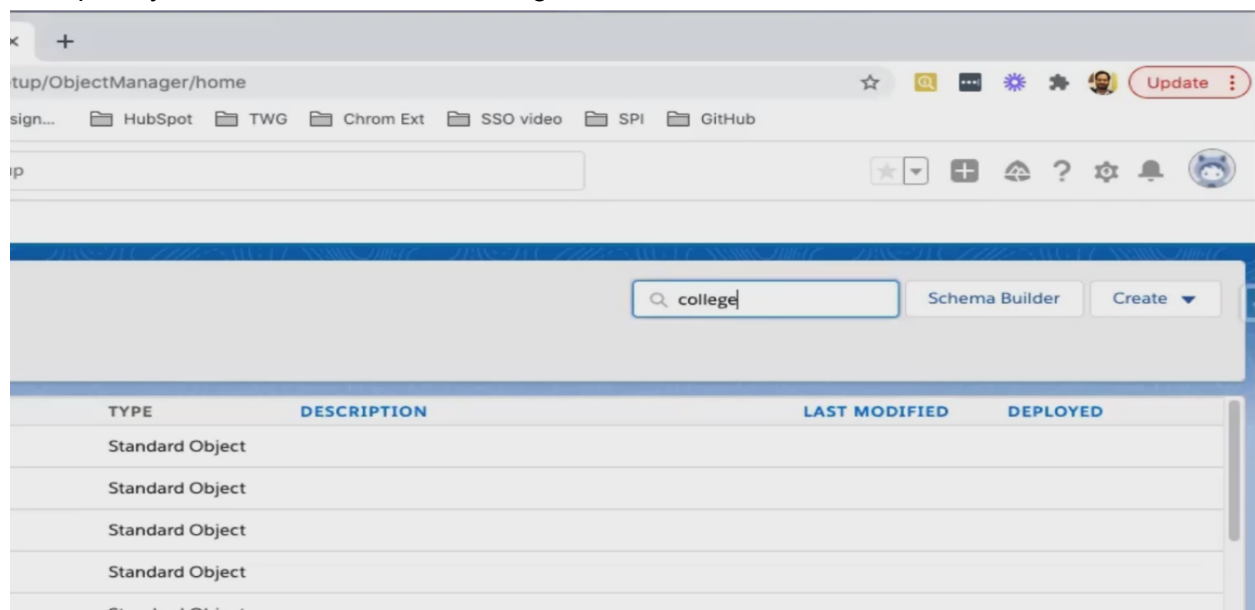


Lecture 2: Exploring master detail relationship.

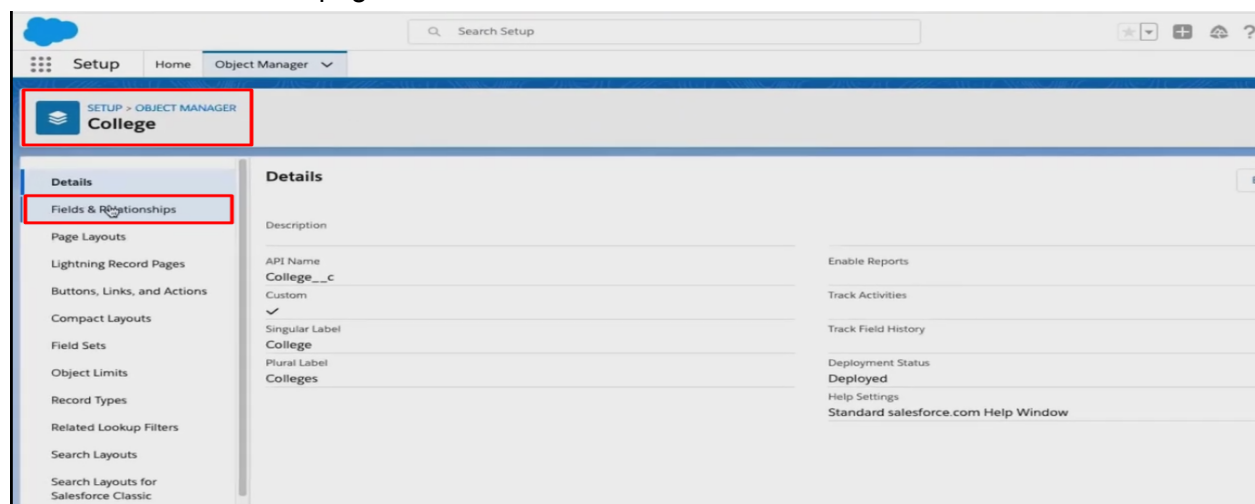
In this lecture we will learn about master detail relationship and explore the topic in detail.

Step 1: Master detail relationship works for one to many relationship, which means that one record can be related to many records. Master detail relationship is similar to lookup relationship that we studied in the previous session, in master detail relationship we have to relate two objects one will be of parent side and another one will be of child side.

Step 2: In order to create a master detail relationship field you need to take two objects here for demonstration we have selected Account and college where Account is the parent or master record and college is the child record. So you have to open an object manager and in the quick find option you have to search for a college.



Step 3: Once you open the record college click on the option fields and relationship given on the left hand side of the page.



Step 4: After clicking on fields and relationship click on the option new given on the top of the screen, as you click on new you will be directed to the next page where you will see the step one for creation of field as you scroll down you will see an option available as master detail relationship you have to select that and click next.

College
New Custom Field

Step 1. Choose the field type

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 au

☐ Formula A read-only field that derives its value from a formula expression you define. The formula field is

☐ Roll-Up Summary A read-only field that displays the sum, minimum, or maximum value of a field in a related list o

☐ Lookup Relationship Creates a relationship that links this object to another object. The relationship field allows users
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
• The relationship field is required on all detail records.
• The ownership and sharing of a detail record are determined by the master record.

Step 5: As you click on next you will be taken to step number two which is to choose the related object. You have to click on the drop down and select your parent object, after selecting click on next.

College
New Relationship

Step 2. Choose the related object

Select the other object to which this object is related.

Related To Account

Step 6: The third step will be to enter the labels and names. The label name and child relationship name will be generated by default; you can also change it if you want. Moving on further you can also put help text and description if you want below you will notice an option given as sharing settings you can select as per your requirement for this lecture we are selecting read/write. Next is allow reparenting so if you want that child can change its parent record you can select that checkbox and then click on next.

The screenshot shows the 'New Relationship' form in a system. The title is 'College New Relationship'. A blue header bar indicates 'Step 3. Enter the label and name for the lookup field'. The form contains several input fields: 'Field Label' with the value 'Account', 'Field Name' with the value 'Account', 'Description' (empty), and 'Help Text' (empty). Below these, 'Child Relationship Name' is set to 'Colleges'. The 'Sharing Setting' section has two radio buttons: 'Read Only' (unselected) and 'Read/Write' (selected). The 'Read/Write' option is described as 'Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.'

Step 7: Next step is Establish field-level security for reference field so can enable as per your requirement and after enabling click on next.

The screenshot shows the 'New Relationship' form in a system, now at 'Step 4 of 6: Establish field-level security for reference field'. A red arrow points to the step indicator. The form displays the details of the relationship: 'Field Label: Account', 'Data Type: Master-Detail', 'Field Name: Account', and 'Description'. Below this, a message states: 'These are the field-level settings for a Master-Detail relationship. They cannot be changed.' A table titled 'Field-Level Security for Profile' lists various users and their permissions. The table has three columns: 'Field-Level Security for Profile', 'Visible', and 'Read-Only'. The 'Next' button is highlighted with a red box and a red arrow.

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	✓	<input type="checkbox"/>
Analytics Cloud Security User	✓	<input type="checkbox"/>
Authenticated Website	✓	<input type="checkbox"/>
Authenticated Website	✓	<input type="checkbox"/>
Contract Manager	✓	<input type="checkbox"/>
Cross Org Data Proxy User	✓	<input type="checkbox"/>

Step 8: Next step is Add reference field to page layout so you have to enable the checkbox and click next.

The screenshot shows the 'New Relationship' setup page for a 'College' object. A red box highlights the step title 'Step 5. Add reference field to Page Layouts'. Another red box highlights the 'Next' button, with a red arrow pointing to it. The page displays the following field information:

Field Label	Account
Data Type	Master-Detail
Field Name	Account
Description	

Below this, a message states: 'These are the page layouts that will include this field. Because this is a Master-Detail relationship, the field is required.'

Add Field	Page Layout Name
<input checked="" type="checkbox"/>	College Layout

At the bottom right, there are 'Previous' and 'Next' buttons.

Step 9: The final step is Add custom related lists. So whenever we create a Master detail relationship a reference list is created that we need to add on the parent object page layout. So the related list label will be auto generated. You can also change it and below that we have to choose on which page layout we have to place it. Our parent object "Account" has four page layouts you can check accordingly. We are here selecting all and then click on save.

The screenshot shows the 'New Relationship' setup page for a 'College' object. A red box highlights the step title 'Step 6. Add custom related lists'. Another red box highlights the 'Related List Label' field, which contains the text 'Colleges'. A third red box highlights the list of page layouts, with a red arrow pointing to it. The page displays the following field information:

Field Label	Account
Data Type	Master-Detail
Field Name	Account
Description	

Below this, a message states: 'Specify the title that the related list will have in all of the layouts associated with the parent.'

Related List Label:

These are the page layouts that will include this field. Because this is a Master-Detail relationship, the field is required.

Add Related List	Page Layout Name
<input checked="" type="checkbox"/>	Account (Marketing) Layout
<input checked="" type="checkbox"/>	Account (Sales) Layout
<input checked="" type="checkbox"/>	Account (Support) Layout
<input checked="" type="checkbox"/>	Account Layout

At the bottom, there is a checkbox labeled 'Append related list to users' existing personal customizations' which is also checked.

Step 10: As you click on save you will be directed to the next page where you can see that on the property object we have created a Master detail relationship(Account) a field is created.

Fields & Relationships			
5 Items, Sorted by Field Label			
<input type="text" value="Quick Find"/>			
New Deleted Fields			
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD
Account	Account__c	Master-Detail(Account)	
College Name	Name	Text(80)	
Created By	CreatedById	Lookup(User)	
Last Modified By	LastModifiedById	Lookup(User)	
Phone	Phone__c	Phone	

Step 11: So now you have to go to the app launcher and search college, click to open it and you will see a record named college will appear on top of the screen. Now you have to click on new and create a new record.

The screenshot shows the Salesforce interface. In the top navigation bar, the 'Colleges' menu item is highlighted with a red box. Below the navigation bar, the 'Colleges' list view is displayed. The list view has a 'New' button highlighted in red. The list view currently shows 0 items. The message 'You haven't viewed any colleges recently. Try switching list views.' is displayed at the bottom of the list view.

Step 12: As you fill the information and click save you will be directed to the next page where you will be able to see that the account is created where if you scroll down you will see that college related list is available and college record is associated with this.



Step 13: Now if we try to create a new record and click save we will be directed to the next page as we scroll down we will see that under the college related list our new record is also associated.

