

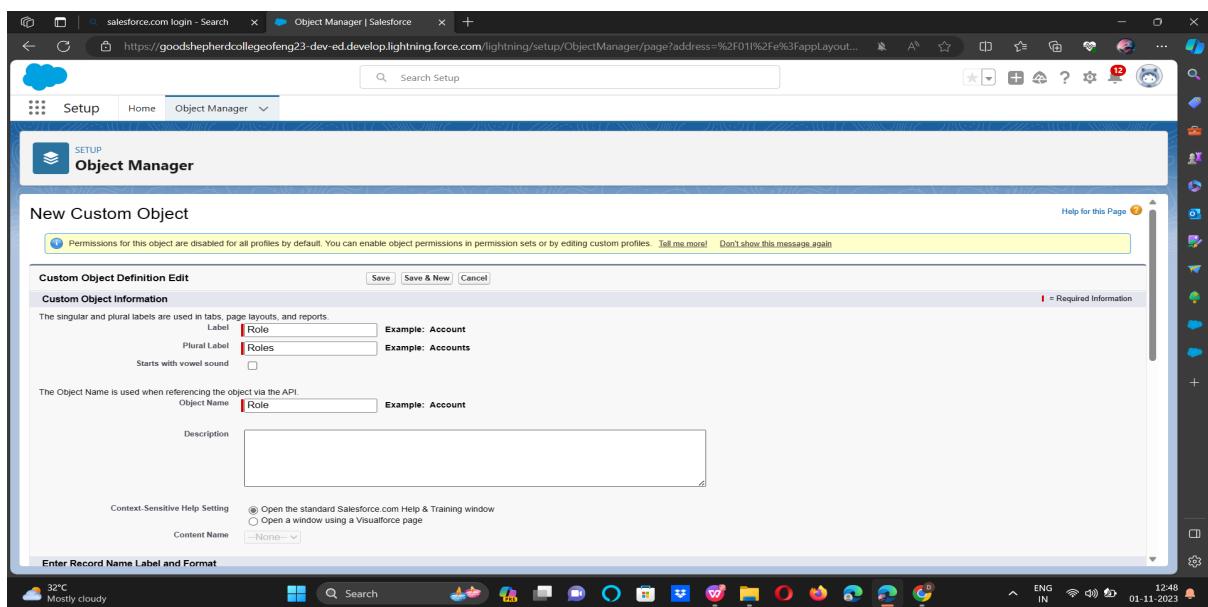
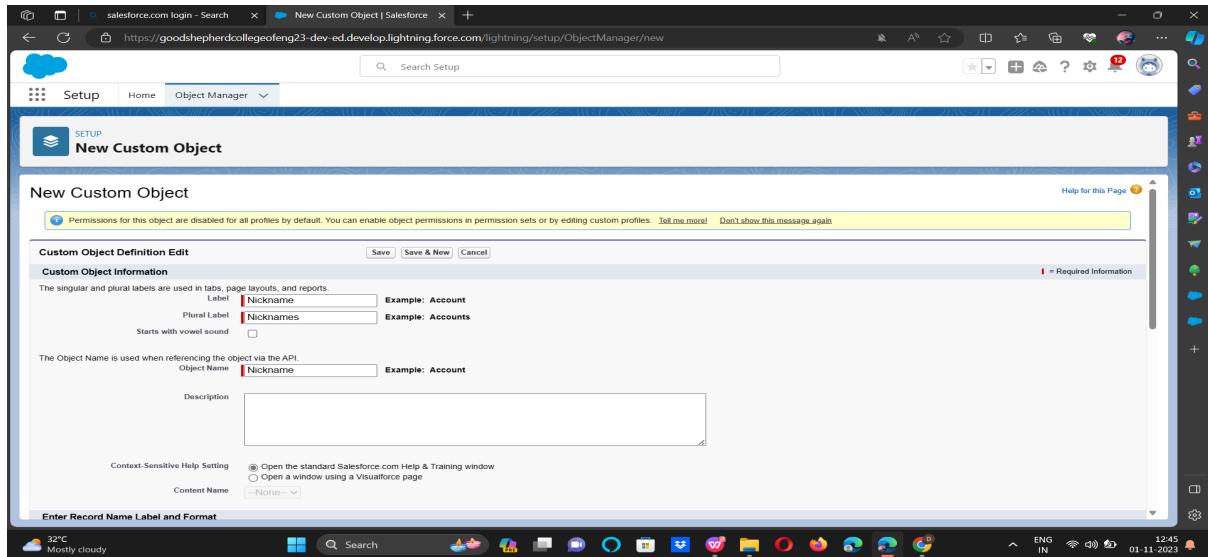
ASSIGNMENT

SUBMITTED BY

Dalia Mariam James

NMID:627CA7B2B4E437189FE471F4B6C30AB6

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



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 roll-up 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.

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

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Nickname New Relationship Help for this Page

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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The screenshot shows the Salesforce Setup interface for creating a new object named 'Nickname'. The current step is 'Step 3 of 6' titled 'Enter the label and name for the lookup field'. The 'Field Label' is set to 'Role' and the 'Field Name' is also 'Role'. A 'Description' field is empty. Under 'Sharing Setting', 'ReadWrite' is selected. In the 'Lookup Filter' section, there is a note about creating a filter to limit records available to users in the lookup field. The left sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc.

The screenshot shows the Salesforce Setup interface for creating a new custom field named 'New Custom Field' on the 'Role' object. The current step is 'Step 1 of 6' titled 'Choose the field type'. The 'Data Type' is set to 'None Selected'. Other options shown include 'Auto Number', 'Formula', 'Roll-Up Summary' (which is selected), 'Lookup Relationship', 'Master-Detail Relationship', and 'External Lookup Relationship'. The right sidebar provides help for the page.

salesforce.com login - Search Role | Salesforce

https://goodshepherdcollegefeng23-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I5g0000041wB/FieldsAndRelationships/n...

Setup Home Object Manager

SETUP > OBJECT MANAGER Role

Role New Custom Field

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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This screenshot shows the second step of creating a new custom field in Salesforce. The field is named 'RecordCount' with the internal name 'RecordCounts'. The 'Description' and 'Help Text' fields are empty. A checkbox for adding the field to custom reports is checked. The sidebar on the left lists various setup options under 'Fields & Relationships'.

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https://goodshepherdcollegefeng23-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I5g0000041wB/FieldsAndRelationships/n...

Setup Home Object Manager

SETUP > OBJECT MANAGER Role

Role New Custom Field

Step 3. Define the summary calculation Step 3 of 5

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

Previous Next Cancel

32°C Hot weather

Search ENG IN 13:42 01-11-2023

This screenshot shows the third step of defining a summary calculation. The 'Summarized Object' is set to 'Nicknames'. The 'Roll-Up Type' is set to 'COUNT'. A 'Field to Aggregate' dropdown is currently empty. The sidebar on the left lists various setup options under 'Fields & Relationships'.

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https://goodshepherdcollegefeng23-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01l5g0000041wBl/FieldsAndRelationships/0...

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:

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-

Copilot (preview)

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Search

ENG IN 14:11 01-11-2023

salesforce.com login - Search | Lightning Usage | Salesforce | Role | Salesforce

https://goodshepherdcollegefeng23-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01l5g0000041wBl/FieldsAndRelationships/00N5g0...

Setup Home Object Manager

Role

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: RecordCounts		
API Name: RecordCounts__c		
Description:		
Help Text:		
Data Owner:		
Field Usage:		
Data Sensitivity Level:		
Compliance Categorization:		
Created By: Dalia Mariam James, 01/11/2023, 1:44 pm	Modified By: Dalia Mariam James, 01/11/2023, 2:10 pm	

Help for this Page

Roll-Up Summary Options

Data Type: Roll-Up Summary	Summary Type: COUNT
Summarized Object: Nickname	
Filter Criteria: Nickname EQUALS 0	

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Search

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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 image contains two screenshots of the Salesforce Setup interface, showing the process of cloning a profile and configuring sharing settings.

Screenshot 1: Cloning a Profile

This screenshot shows the "Clone Profile" screen under the "Profiles" section of the Setup menu. The user is cloning the "Customer Community Login User" profile and naming the new profile "user a".

Existing Profile	User License	Profile Name
Customer Community Login User	Customer Community Login	user a

Screenshot 2: Sharing Settings

This screenshot shows the "Sharing Settings" screen under the "Sharing" section of the Setup menu. It displays organization-wide sharing defaults and other settings like Manager Groups and Secure guest user record access.

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Account and Contract	Public Read/Write	Private	✓

Other Settings:

- Manager Groups:
- Secure guest user record access:
- Require permission to view record names in lookup fields:

The screenshot shows the Salesforce Setup interface for Profiles. The left sidebar has 'Q. PROF' selected under 'Profiles'. The main content area is titled 'Clone Profile' with the sub-header 'SETUP Profiles'. A message at the top says 'You must select an existing profile to clone from.' Below this, there are fields: 'Existing Profile' dropdown set to 'Customer Community Plus Login User', 'User License' dropdown set to 'Customer Community Plus Login', and 'Profile Name' input field containing 'User b'. At the bottom are 'Save' and 'Cancel' buttons.

The screenshot shows the Salesforce Setup interface for Sharing Settings. The left sidebar has 'sharing' selected under 'Security'. The main content area is titled 'Sharing Settings' with the sub-header 'SETUP Sharing'. It includes a note about roles and subordinates, and instructions to use sharing rules only to grant wider access to data, not to restrict access. The process is divided into five steps: Step 1: Rule Name (Label: 'User a', Rule Name: 'User_a'), Step 2: Select your rule type (Rule Type: Based on record owner), 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), and Step 5: Select the level of access for the users (Lead Access: Read Only). At the bottom are 'Save' and 'Cancel' buttons.

salesforce.com login - Search | Lightning Usage | Salesforce | Account Settings | Salesforce | Lightning Experience | Salesforce

https://goodshepherdcollegefeng23-dev-ed.lightning.force.com/lightning/setup/null/page?address=%2Fsetup%2Flayout%2Flsedit.jsp%3Fid...

Setup Home Object Manager

Hyperforce Assistant

Q pr

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

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Search Setup

SETUP

Account Field-Level Security for profile user b

Help for this Page

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	✓	✓

Save Cancel

ENG IN 17:03 01-11-2023

salesforce.com login - Search | Lightning Usage | Salesforce | Account Settings | Salesforce | Permission Sets | Salesforce

https://goodshepherdcollegefeng23-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2Fudd%2FPermissionSet%2Fnew...

Setup Home Object Manager

Hyperforce Assistant

Lightning Experience Transition Assistant

Users Permission Set Groups Permission Sets

Email Apex Exception Email

Apps AppExchange Marketplace

Feature Settings Analytics Reports & Dashboards Report Types Chatter Groups Record Types

Data.com Prospector Preferences

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Search Setup

SETUP

Permission Sets

Help for this Page

Permission Set Create

Enter permission set information

Label: user a

API Name: user_a

Description:

Session Activation Required: description

I = Required Information

Select the type of users who will use this permission set

Who will use this permission set?

-Choose 'None' if you plan to assign this permission set to multiple users with different user and permission set licenses.
-Choose a specific user license if you want users with only one license type to use this permission set.
-Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.

Not sure what a permission set license is? Learn more here.

License: Salesforce Platform

Save Cancel

ENG IN 17:11 01-11-2023

salesforce.com login - Search | Lightning Usage | Salesforce | Account Settings | Salesforce | Lightning Experience | Salesforce

https://goodshepherdcollegefeng23-dev-ed.lightning.force.com/lightning/setup/null/page?address=%2Fsetup%2Flayout%2Flsedit.jsp%3Fid...

Setup Home Object Manager

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

Account Field-Level Security for profile user a

Field Name Field Type Read Access Edit Access

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"/>

Save Cancel Help for this Page

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Search

17:02 01-11-2023

The screenshot shows the Salesforce Setup interface. On the left, there's a sidebar with navigation links: Home, Object Manager, and several sections under 'Data' such as Mass Transfer Approval Requests, Feature Settings, Marketing, Sales, and Products. The main content area is titled 'Account Field-Level Security for profile user a'. It shows a table with columns for 'Field Name', 'Field Type', 'Read Access', and 'Edit Access'. The table lists various account fields like Account Name, Account Number, Account Owner, etc., with checkboxes indicating whether the user profile has read or edit access to each. At the bottom right of the main window, there are 'Save' and 'Cancel' buttons, and a link to 'Help for this Page'. The status bar at the bottom of the screen shows the weather (32°C, Mostly cloudy), the date (01-11-2023), and the time (17:02).

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 image contains two screenshots of the Salesforce Setup interface, illustrating the configuration of permission sets.

Screenshot 1: Permission Set Assignment (Manage Assignment Expiration)

This screenshot shows the "Manage Assignment Expiration" step for a permission set named "user a". The user has selected "No expiration date". A table titled "Selected Users" lists a single user: "Security User" (Profile: Analytics Cloud Security User, Expires On: Never Expires). The sidebar on the left shows the navigation path: Setup > Object Manager > Permission Sets > user a > Manage Assignment Expiration.

Full Name	Role	Profile	Active	User License	Expires On
Security User		Analytics Cloud Security User	✓	Analytics Cloud Integration User	Never Expires

Screenshot 2: Permission Set Overview (Object Settings - Accounts)

This screenshot shows the "Object Settings" tab for the "Accounts" object within a permission set named "user a". Under "Tab Settings", the "Available" and "Visible" checkboxes are checked. Under "Object Permissions", the "Edit" permission is enabled. Under "Field Permissions", the "Edit Access" checkbox is checked. The sidebar on the left shows the navigation path: Setup > Object Manager > Permission Sets > user a > Object Settings > Accounts.

Permission Name	Enabled
Read	<input checked="" type="checkbox"/>
Create	<input type="checkbox"/>
Edit	<input checked="" type="checkbox"/>
Delete	<input checked="" type="checkbox"/>
View All	<input type="checkbox"/>
Modify All	<input type="checkbox"/>

salesforce.com login - Search | Lightning Usage | Salesforce | Permission Sets | Salesforce | Permission Sets | Salesforce | +

https://goodshepherdcollegefeng23-dev-ed.lightning.force.com/lightning/setup/PermSets/0P5g00000CD3g5/PermissionSetAssignment/new

Setup Home Object Manager

... > PERMISSION SET 'USER A' > MANAGE ASSIGNMENT EXPIRATION

user a

Select Users to Assign

All Users

Full Name	Alias	Username	Role	Active	Profile
Chatter Expert	Chatter	chatty.00d5g00000klhs6eal.pzb4l1e0bne@chatter.salesforce.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Chatter Free User
Dalia Mariam James	DJame	dalia@goodshepherd.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	System Administrator
Integration User	integ	integration@00d5g00000klhs6eal.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Integration User
Security User	sec	insightssecurity@00d5g00000klhs6eal.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Security User

Cancel Next

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Search

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Cloud

Setup Home Object Manager

... > PERMISSION SET 'USER A' > MANAGE ASSIGNMENT EXPIRATION

user a

Select Users to Assign

All Users

Full Name	Alias	Username	Role	Active	Profile
Chatter Expert	Chatter	chatty.00d5g00000klhs6eal.pzb4l1e0bne@chatter.salesforce.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Chatter Free User
Dalia Mariam James	DJame	dalia@goodshepherd.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	System Administrator
Integration User	integ	integration@00d5g00000klhs6eal.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Integration User
Security User	sec	insightssecurity@00d5g00000klhs6eal.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Security User

Cancel Next

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Search

17.26 01-11-2023

Cloud

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

