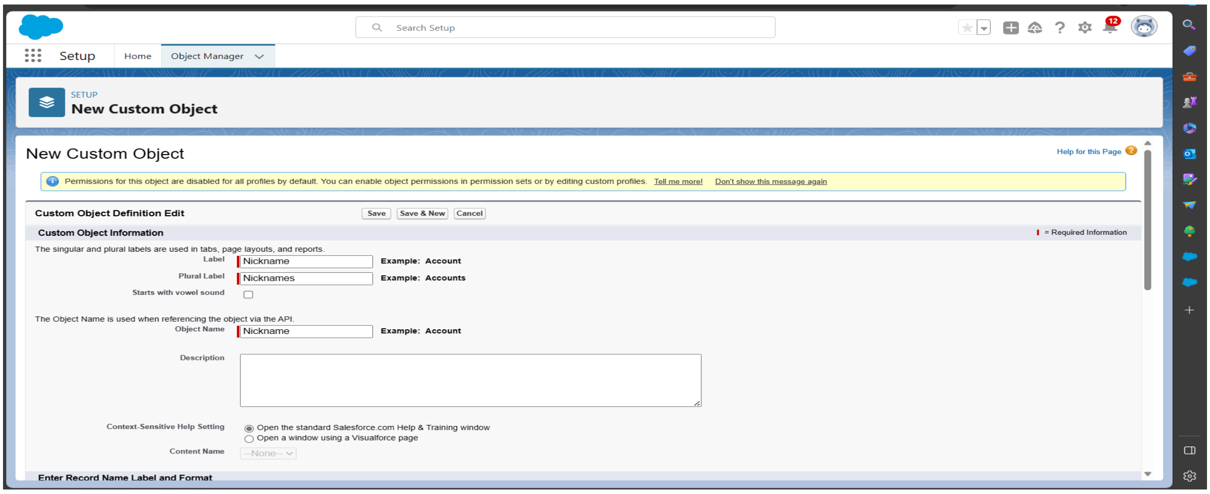
# ASSIGNMENT

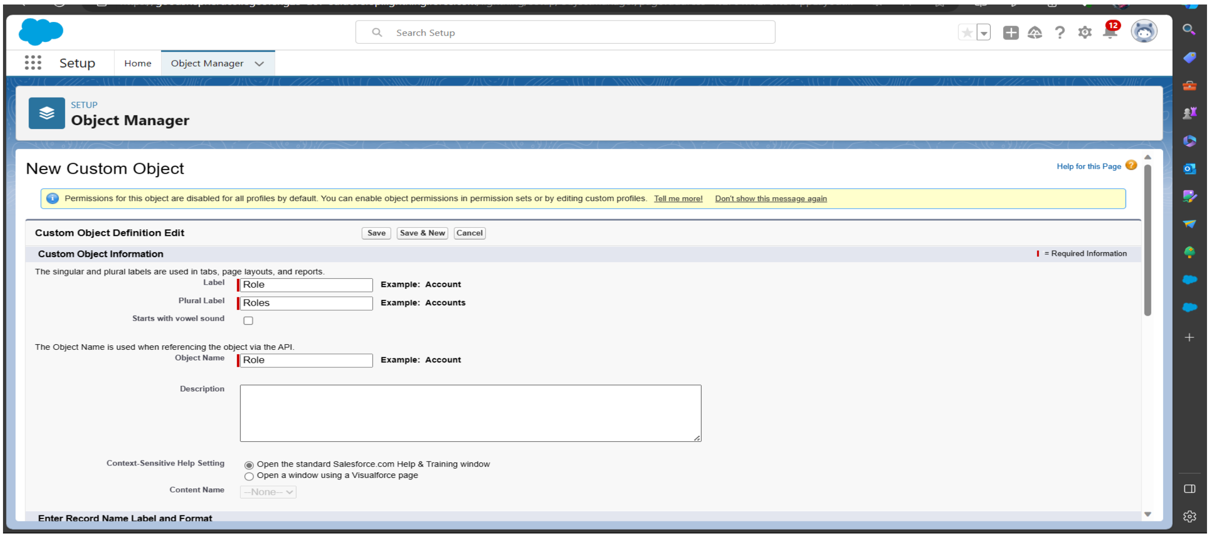
**SUBMITTED BY**

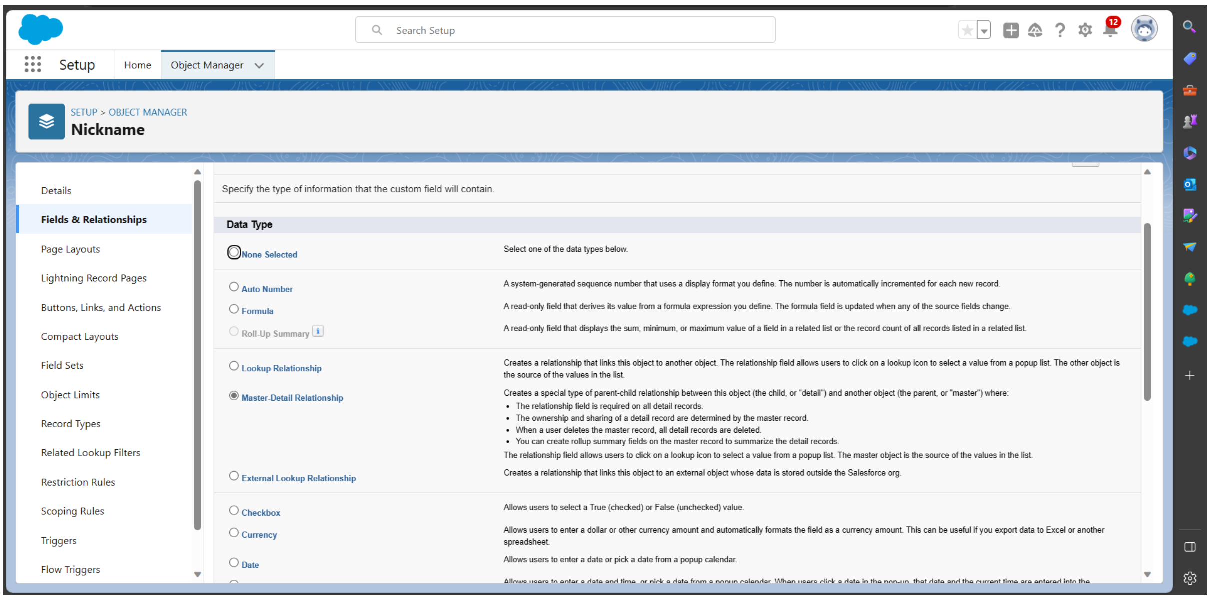
**HARICHANDANA.S**

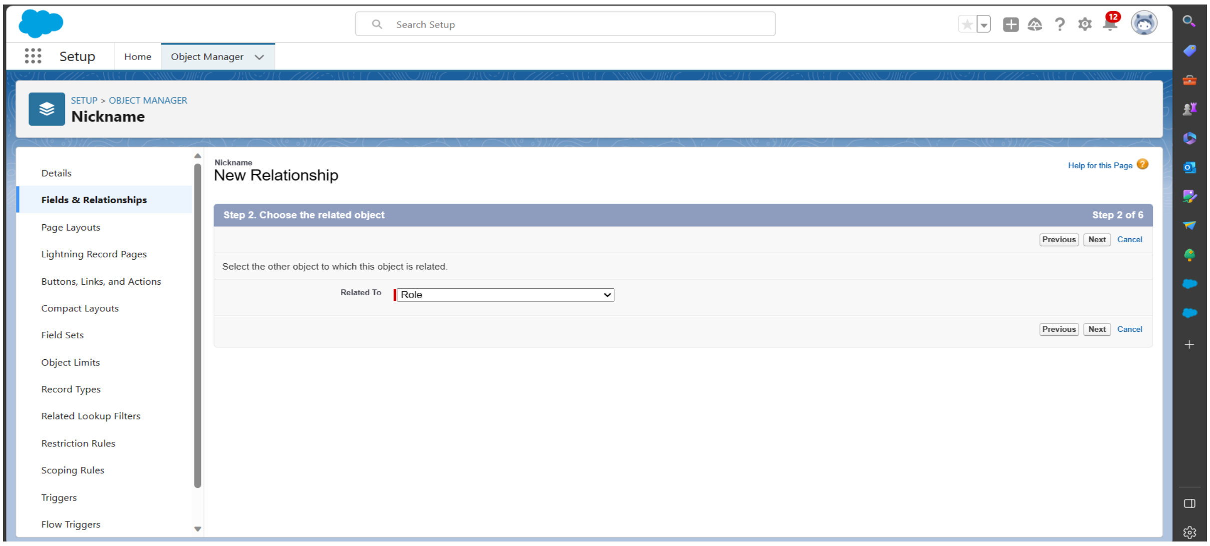
**NMID:**495085AE4AF02A08E5E4D06E50E2095A

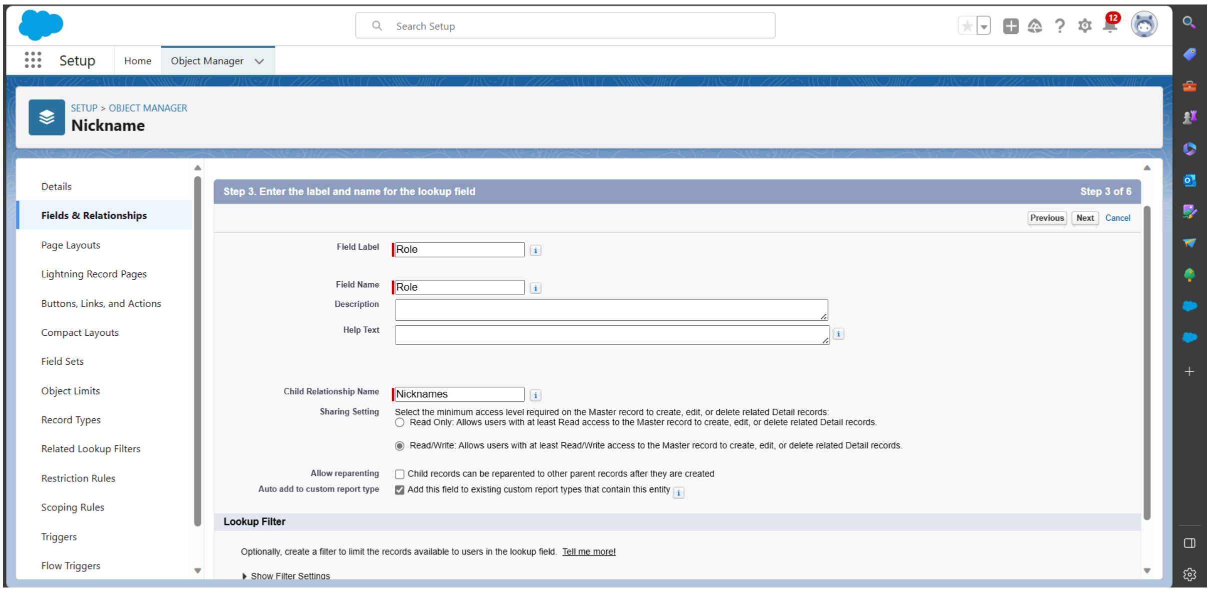
1.Create a Master-Detail Relationship between two Custom objects and also create a Roll Up Summary Field to Calculate total number of records.

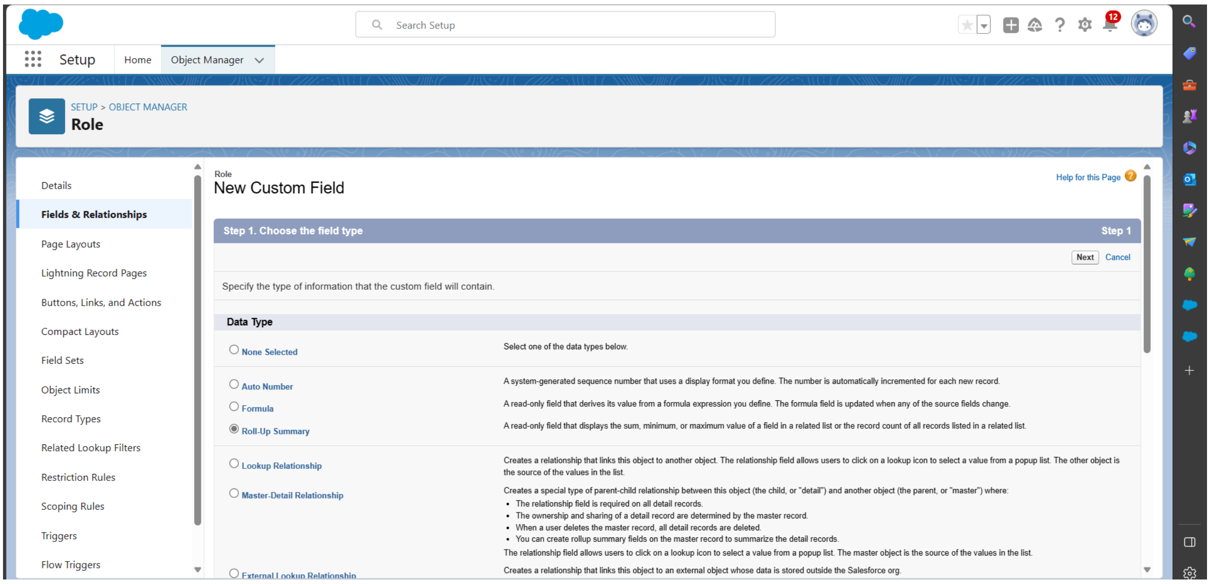



Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Nickname
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Triggers
Flow Triggers
Specify 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
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.
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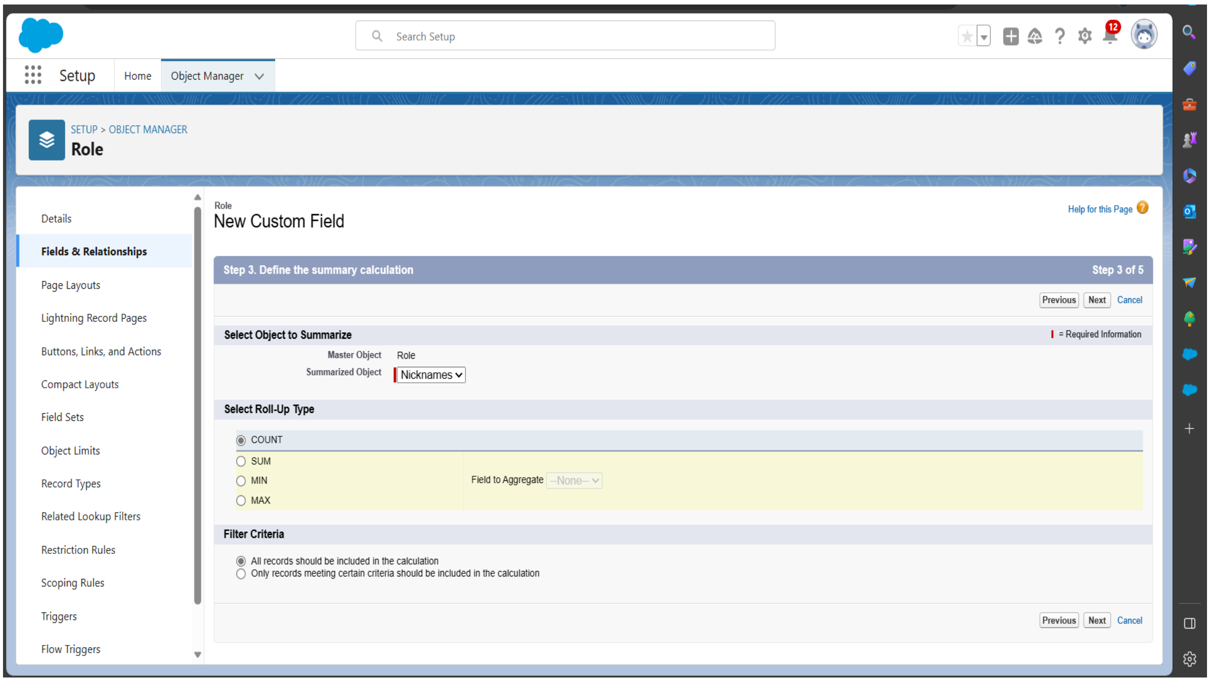
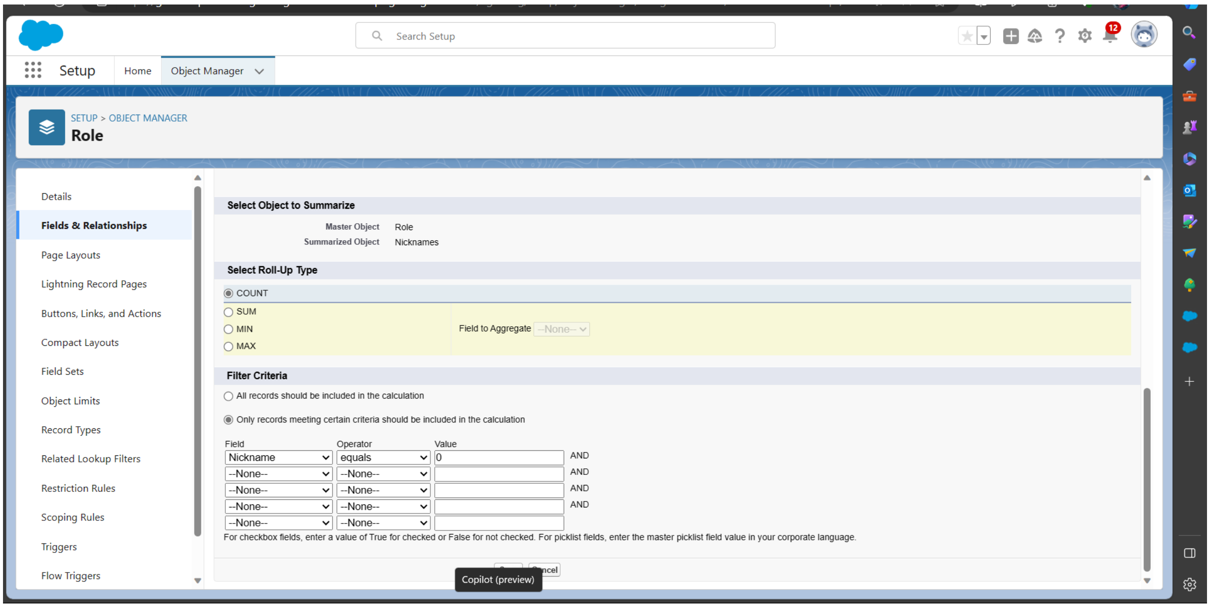
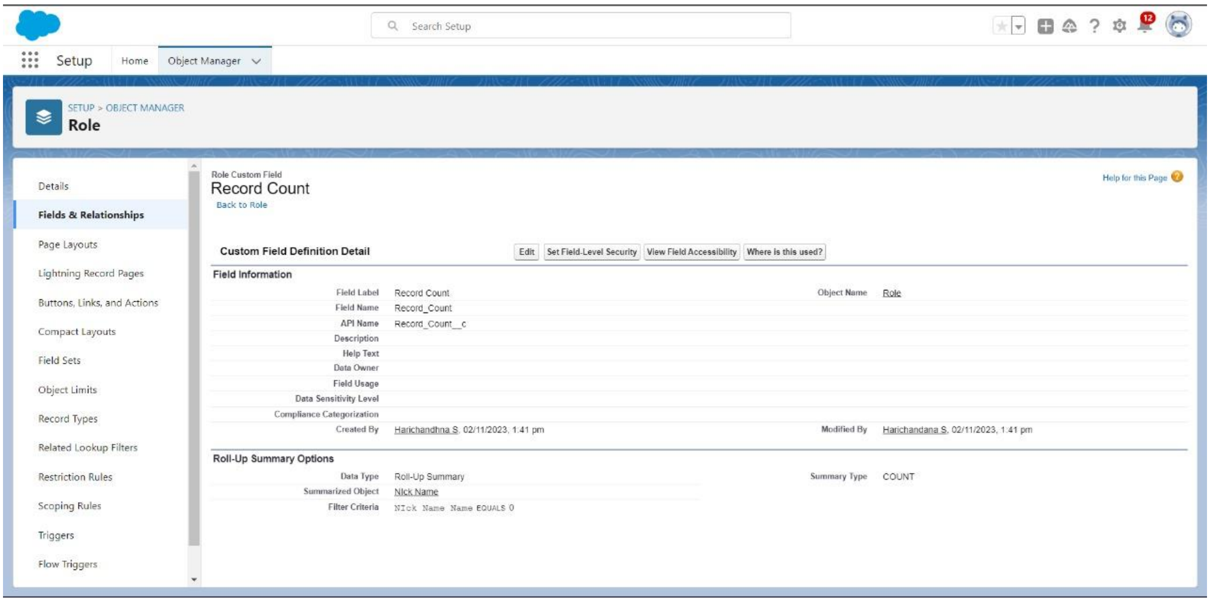
The relationship field is required on all detail records.
The ownership and sharing of a detail record are determined by the master record.
When a user deletes the master record, all detail records are deleted.
You can create rollup summary fields on the master record to summarize the detail records.
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.

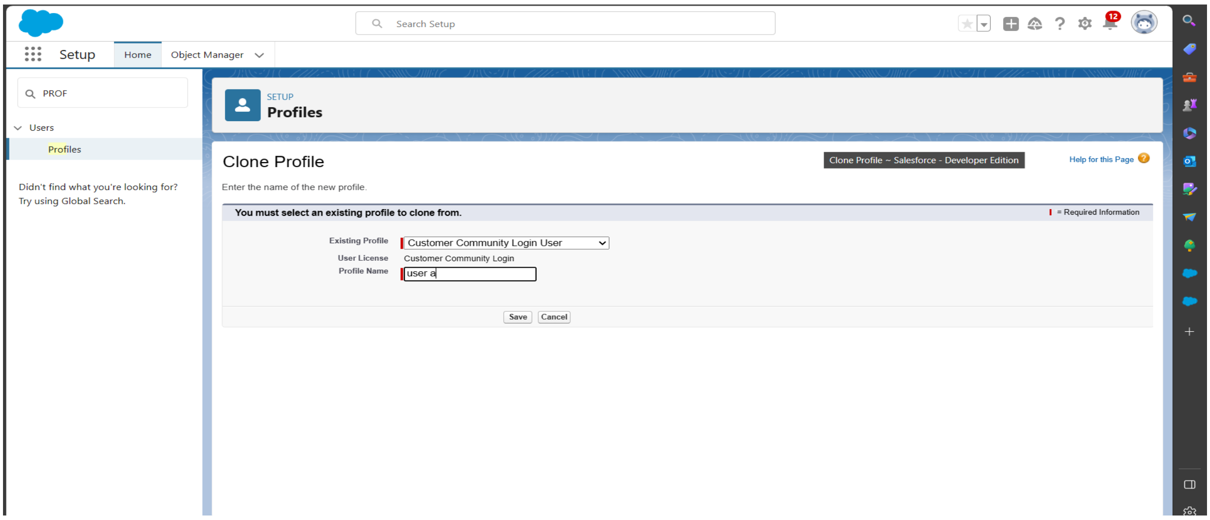

Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Role
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Triggers
Flow Triggers
Role
New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

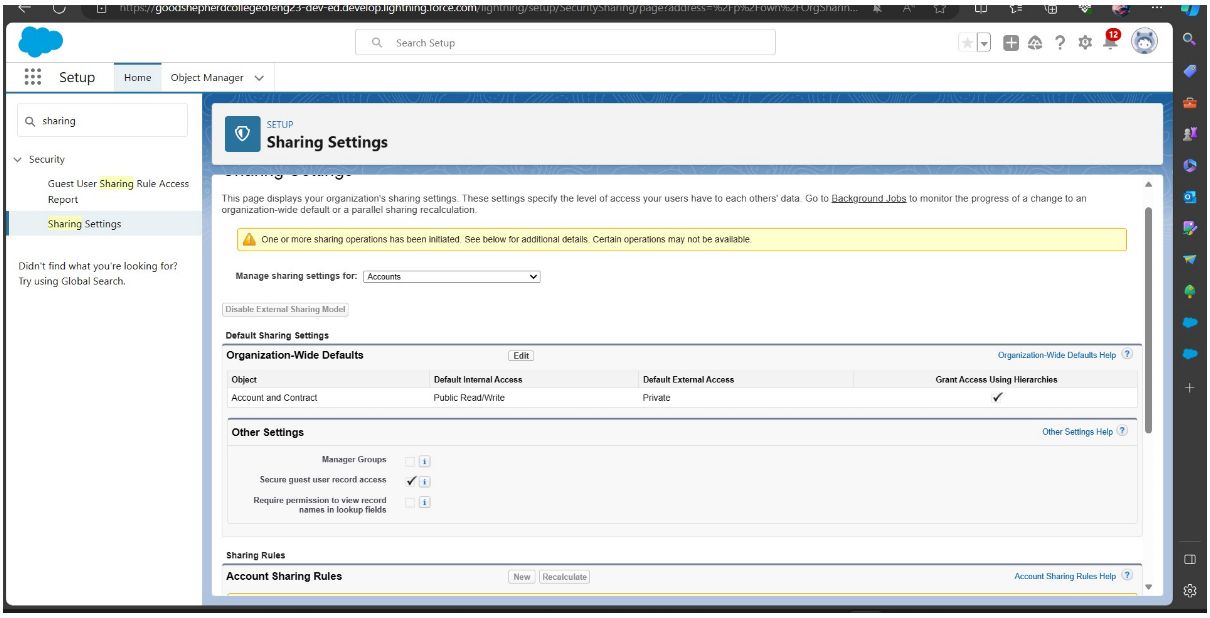


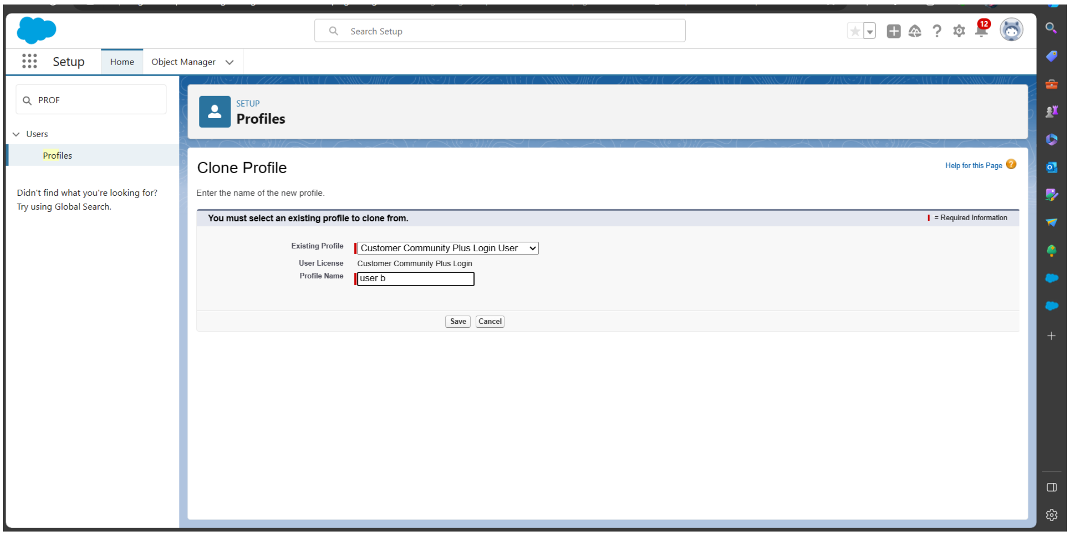



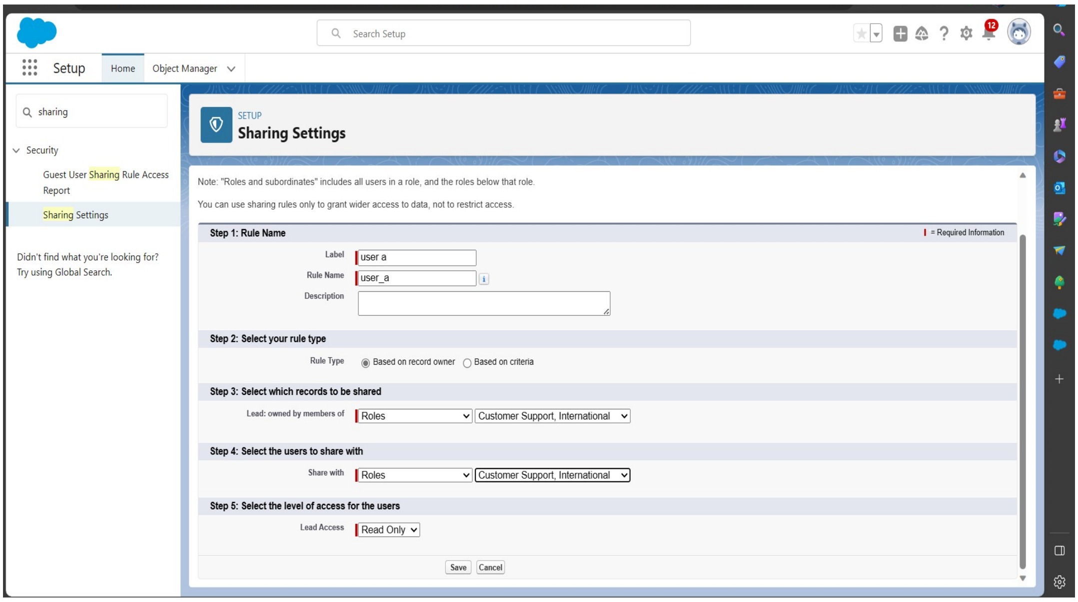

2. If there is 2 user, User A and User B in the organisation and
we want in Account object that User A should not see the

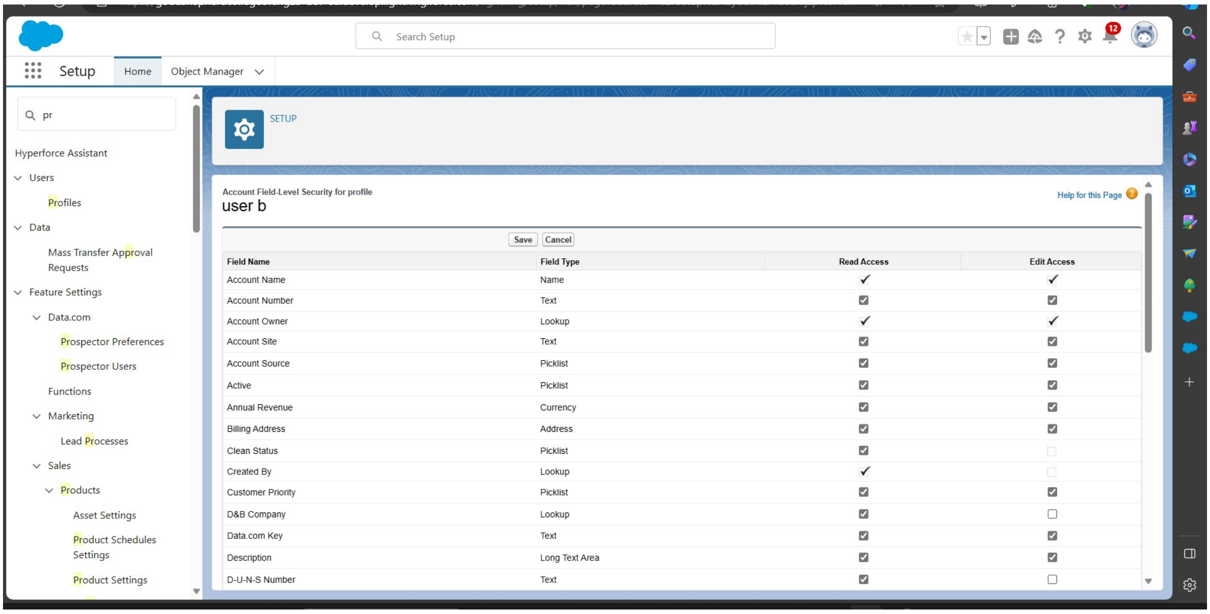
User B Record and user B should not see User A record then apply th Security for the users

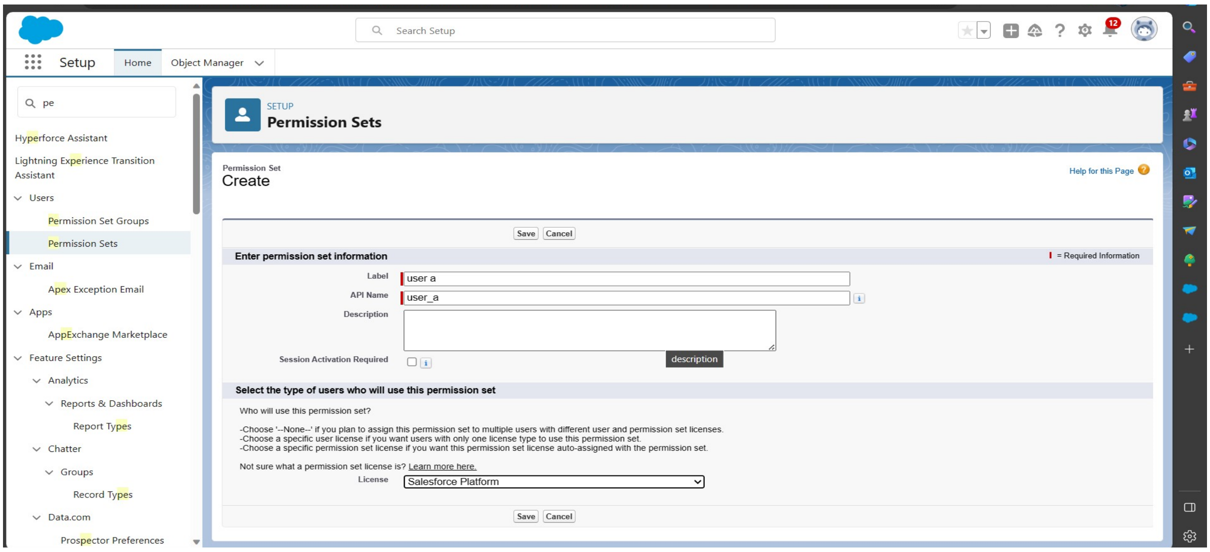


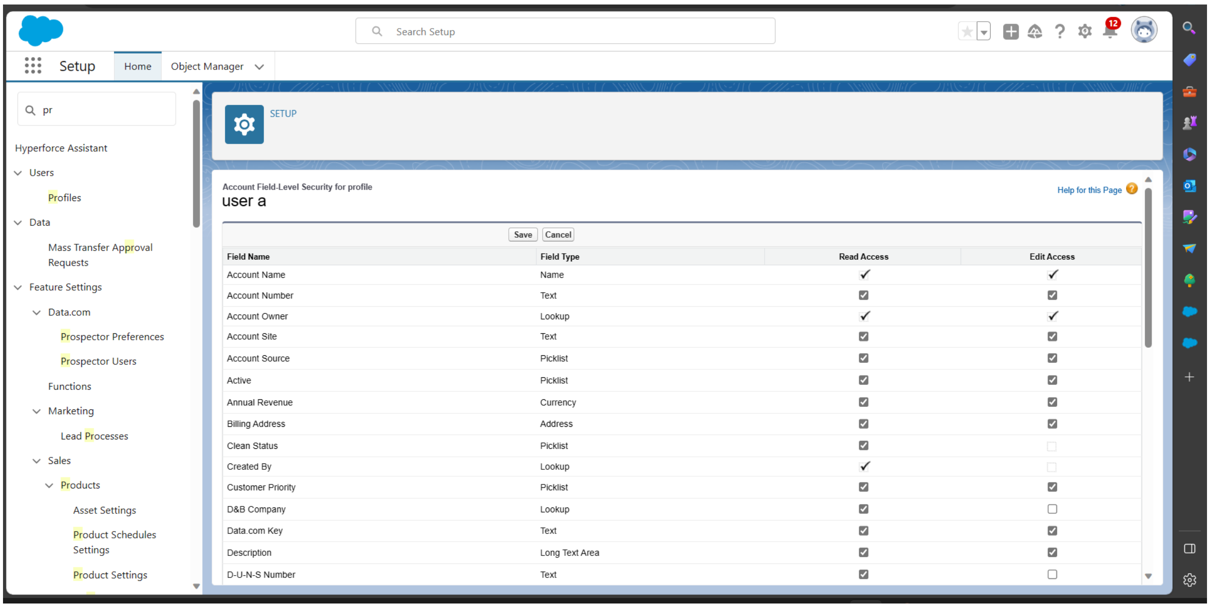




Search Setup
Setup
Home
Object Manager
PROF
Users
Profiles
Didn't find what you're looking for? Try using Global Search.
SETUP
Profiles
Clone Profile
Help for this Page
Enter the name of the new profile.
You must select an existing profile to clone from.
= Required Information
Existing Profile
Customer Community Plus Login User
User License
Customer Community Plus Login
Profile Name
user b
Save
Cancel

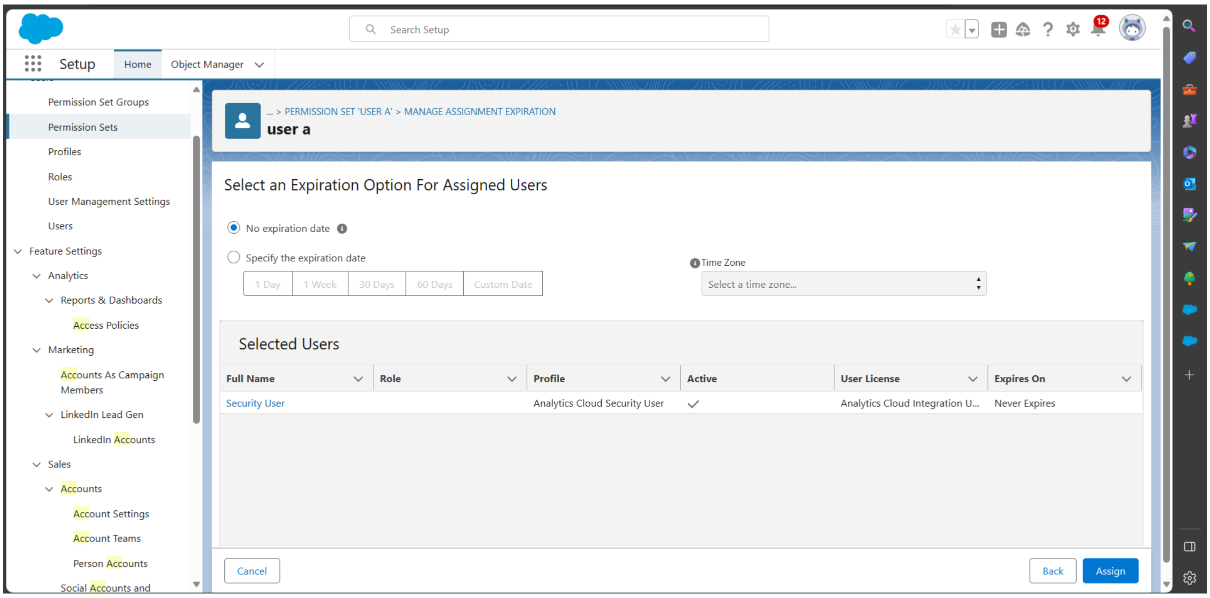

Search Setup
Setup
Home
Object Manager
sharing
Security
Guest User Sharing Rule Access Report
Sharing Settings
Didn't find what you're looking for? Try using Global Search.
SETUP
Sharing Settings
Note: "Roles and subordinates" includes all users in a role, and the roles below that role.
You can use sharing 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

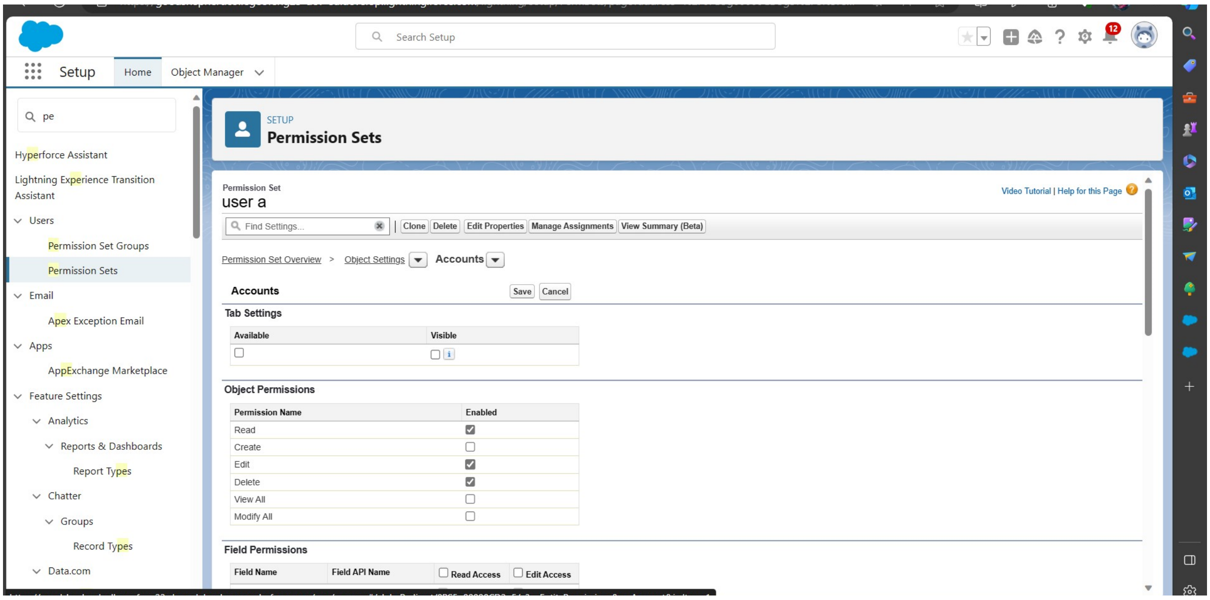

Search Setup
Setup
Home
Object Manager
pr
Hyperforce Assistant
Users
Profiles
Data
Mass Transfer Approval Requests
Feature Settings
Data.com
Prospector Preferences
Prospector Users
Functions
Marketing
Lead Processes
Sales
Products
Asset Settings
Product Schedules Settings
Product Settings
SETUP
Account Field-Level Security for profile
user b
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

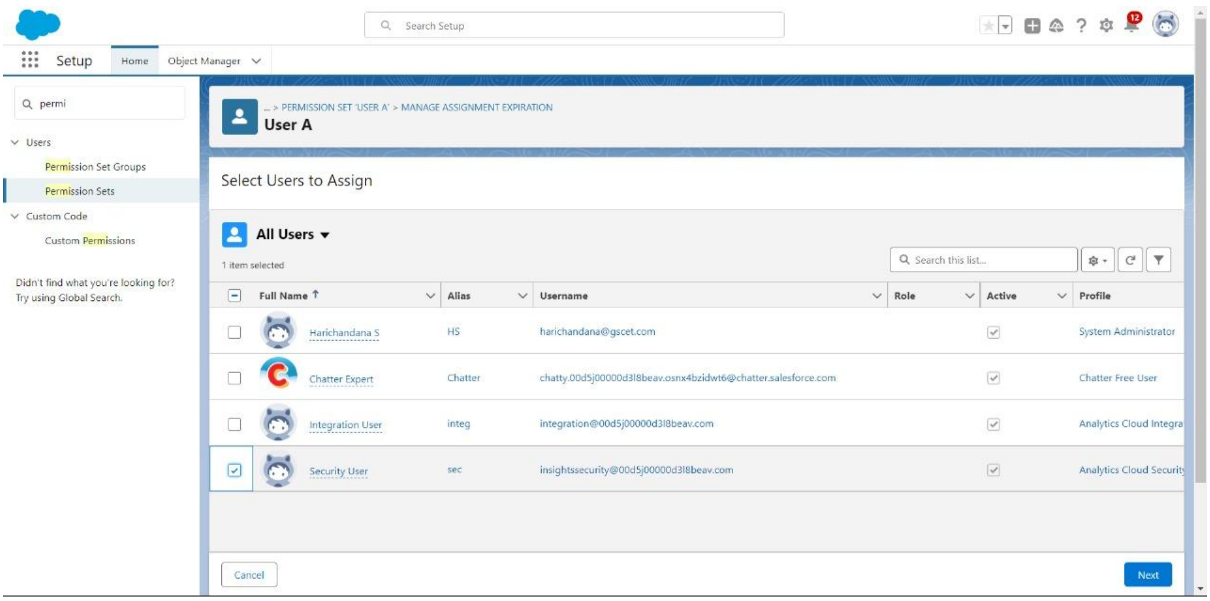

Search Setup
Setup
Home
Object Manager
pe
Hyperforce Assistant
Lightning Experience Transition Assistant
Users
Permission Set Groups
Permission Sets
Email
Apex Exception Email
Apps
AppExchange Marketplace
Feature Settings
Analytics
Reports & Dashboards
Report Types
Chatter
Groups
Record Types
Data.com
Prospector Preferences
SETUP
Permission Sets
Permission Set
Create
Help for this Page
Save
Cancel
Enter permission set information
= Required Information
Label
user a
API Name
user_a
Description
Session Activation Required
description
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


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

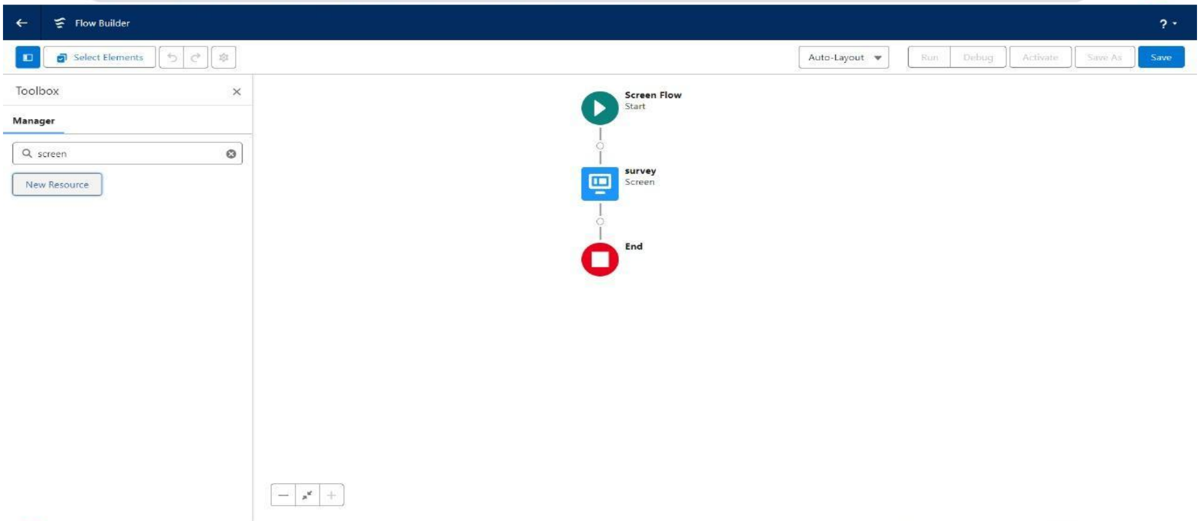
3. Suppose there are 2 Users and they are having Create, Read, Edit access on Account Object with the same profile but we want to open up the access for one user to delete how will you implement the Security setting.

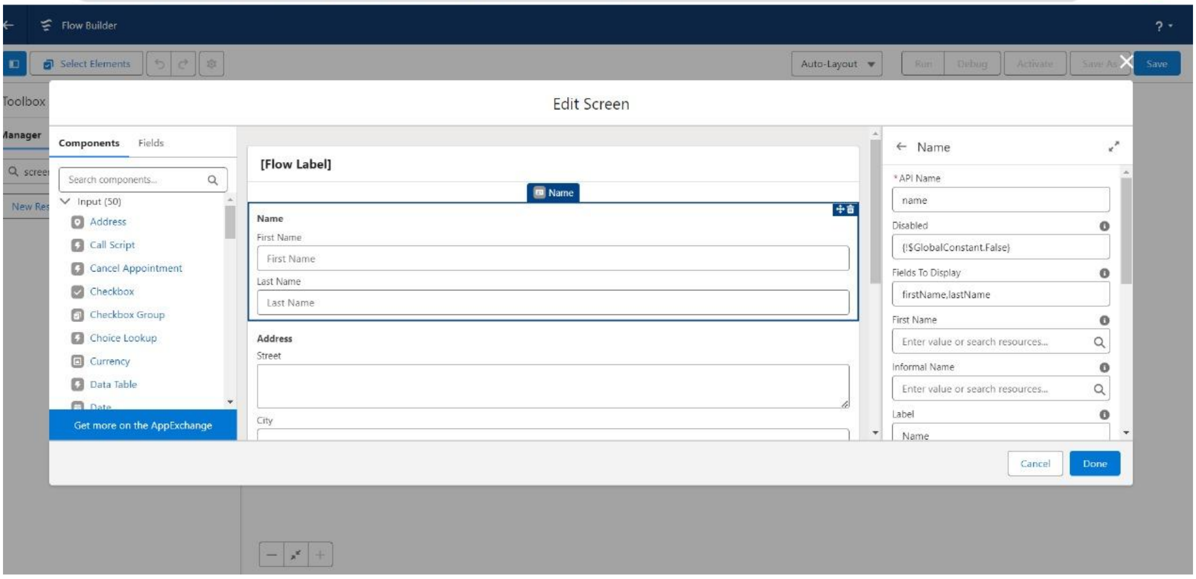


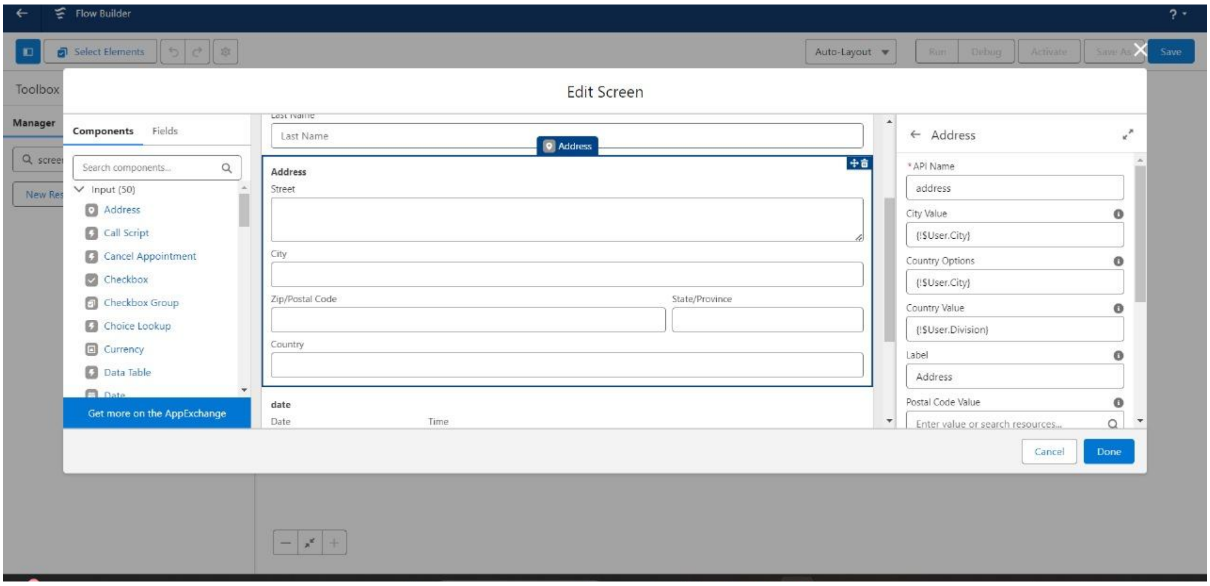

Search Setup
Setup
Home
Object Manager
pe
Hyperforce Assistant
Lightning Experience Transition Assistant
Users
Permission Set Groups
Permission Sets
Email
Apex Exception Email
Apps
AppExchange Marketplace
Feature Settings
Analytics
Reports & Dashboards
Report Types
Chatter
Groups
Record Types
Data.com
SETUP
Permission Sets
Permission Set
user a
Video Tutorial | Help for this Page
Find Settings...
Clone
Delete
Edit Properties
Manage Assignments
View Summary (Beta)
Permission Set Overview > Object Settings
Accounts
Accounts
Save
Cancel
Tab Settings
Available
Visible
Object Permissions
Permission Name
Enabled
Read
Create
Edit
Delete
View All
Modify All
Field Permissions
Field Name
Field API Name
Read Access
Edit Access

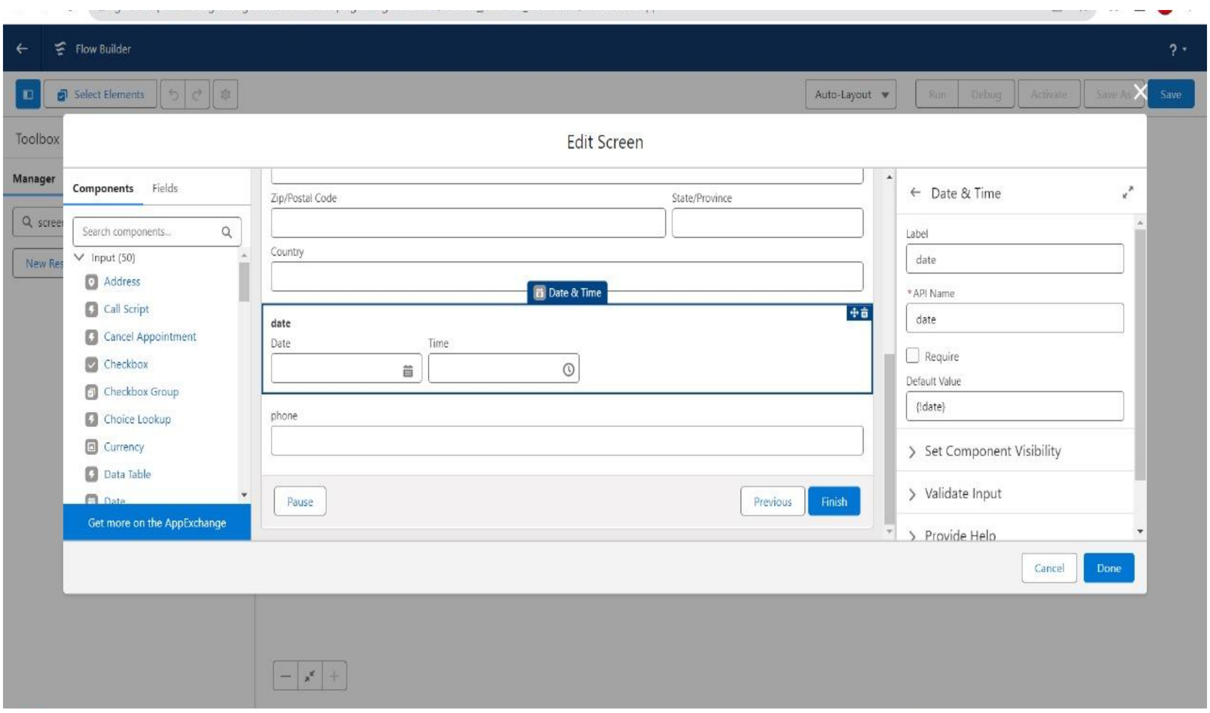

Search Setup
Setup
Home
Object Manager
permi
Users
Permission Set Groups
Permission Sets
Custom Code
Custom Permissions
Didn't find what you're looking for?
Try using Global Search.
... > PERMISSION SET 'USER A' > MANAGE ASSIGNMENT EXPIRATION
User A
Select Users to Assign
All Users
1 item selected
Search this list...
Full Name
Alias
Username
Role
Active
Profile
Harichandana S
HS
harichandana@gscet.com
System Administrator
Chatter Expert
Chatter
chatty.00d5j00000d3l8beav.osnx4bzidwt6@chatter.salesforce.com
Chatter Free User
Integration User
integ
integration@00d5j00000d3l8beav.com
Analytics Cloud Integra
Security User
sec
insightssecurity@00d5j00000d3l8beav.com
Analytics Cloud Securit
Cancel
Next

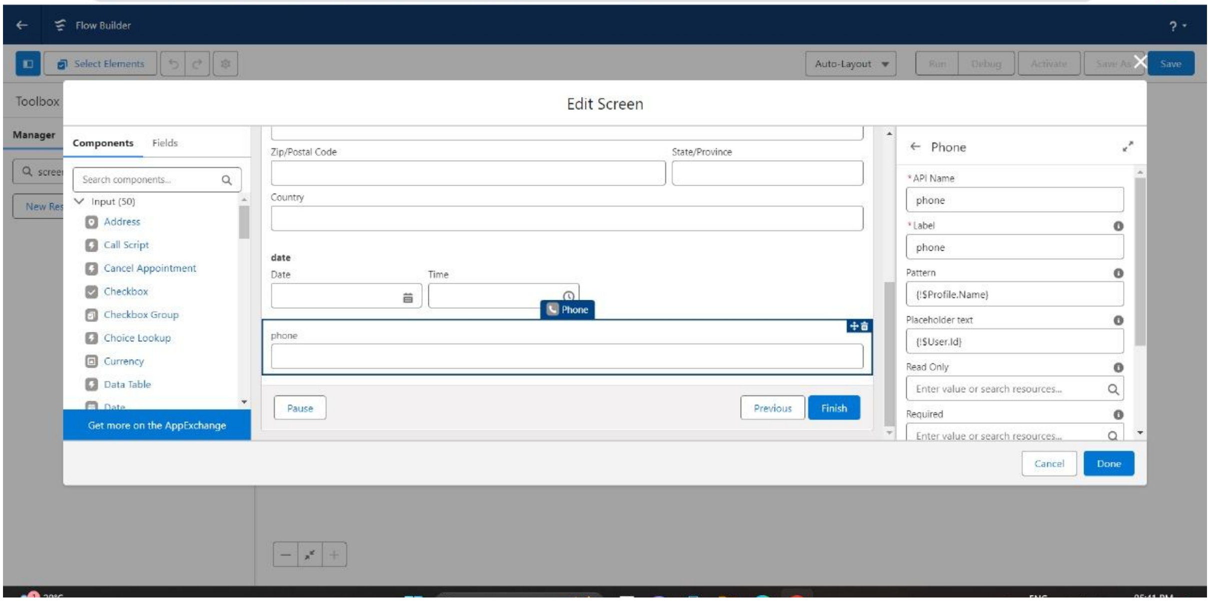
4.Create a screen flow for a basic survey to fill in the details for any form.



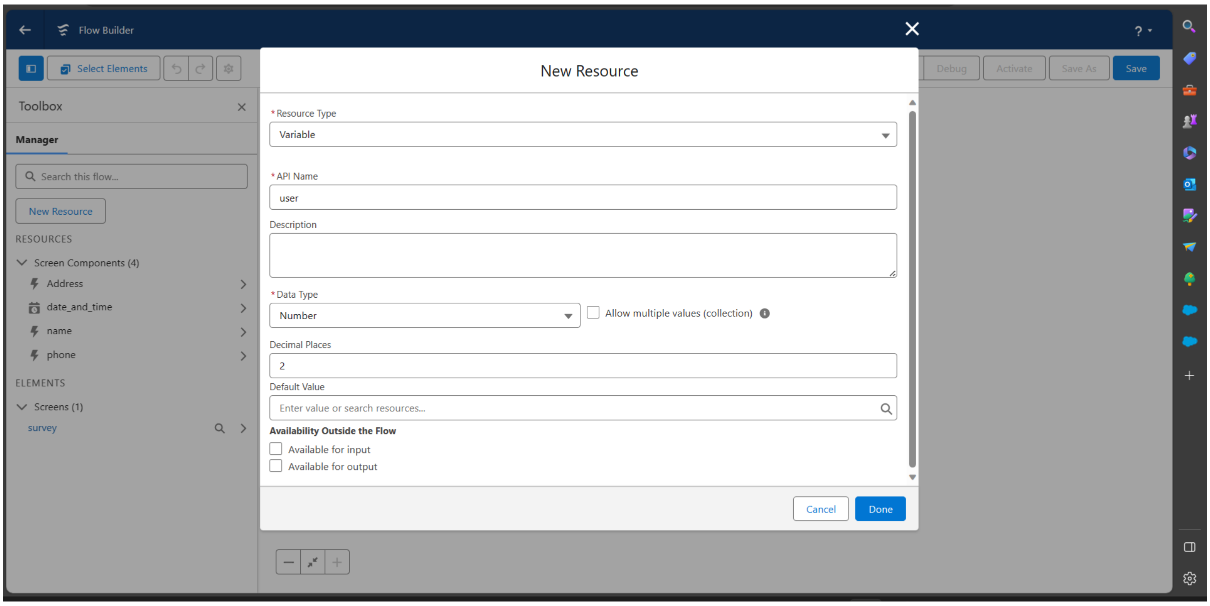




Flow Builder
Edit Screen
Components
Fields
Address
Street
City
Zip/Postal Code
State/Province
Country
API Name
address
City Value
Country Options
Country Value
Label
Postal Code Value
Cancel
Done
Get more on the AppExchange

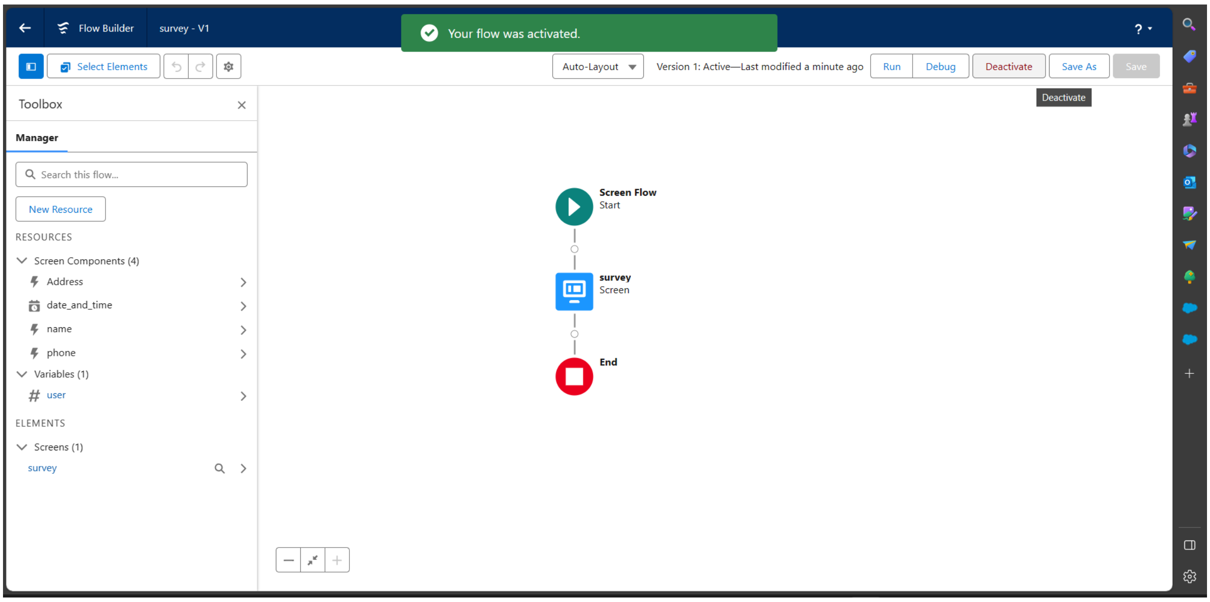

Flow Builder
Edit Screen
Date & Time
date
Date
Time
phone
Pause
Previous
Finish
Label
API Name
Require
Default Value
Set Component Visibility
Validate Input
Provide Help
Cancel
Done



Flow Builder
Select Elements
Auto-Layout
Save
Edit Screen
Components
Fields
Search components...
Input (50)
Address
Call Script
Cancel Appointment
Checkbox
Checkbox Group
Choice Lookup
Currency
Data Table
Get more on the AppExchange
Zip/Postal Code
State/Province
Country
date
Date
Time
Phone
phone
Pause
Previous
Finish
Phone
API Name
phone
Label
phone
Pattern
{!$Profile.Name}
Placeholder text
{!$User.Id}
Read Only
Enter value or search resources...
Required
Cancel
Done

Flow Builder
Select Elements
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
Debug
Activate
Save As
Save



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