

ASSIGNMENT

SUBMITTED BY

Ridhy Mariyam Joy

NMID:06BD10D5A8DB26482314500710E06BD8

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

Home | Salesforce x New Custom Object | Salesforce x +

goodshepherd.collegeofengi82-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new

Setup Home Object Manager

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 Example: Account

Plural Label Example: Accounts

Starts with vowel sound ☐

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

Object Name Example: Account

Description

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

Context Name

Enter Default Name, Label and Format

Home | Salesforce x New Custom Object | Salesforce x +

goodshepherd.collegeofengi82-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new

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Context Name

Enter Default Name, Label and Format

Home | Salesforce x Nick Name | Salesforce x +

goodshepherd.collegeofengi82-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115g000004gAVw/FieldsAndRelationships/new

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
Nick Name

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

Data Type

Select one of the data types below.

☐ None Selected

☐ Auto Number

☐ Formula

☐ Roll-Up Summary

☐ Lookup Relationship

☒ Master-Detail Relationship

☐ External Lookup Relationship

☐ Checkbox

☐ Currency

☐ Date

☐ Date/Time

☐ Email

A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

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.

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.

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.

Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- 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.

Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

Allows users to select a True (checked) or False (unchecked) value.

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.

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 popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.

Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.

Top events
Event brief

Search

ENG IN 12:50 PM 01-11-2023

Home | Salesforce x Nick Name | Salesforce x +

goodshepherd.collegeofengi82-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115g000004gAVw/FieldsAndRelationships/new

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
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Flow Triggers

Nick Name
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

30°C
Mostly sunny

Search

ENG IN 12:53 PM 01-11-2023

Home | Salesforce x Nick Name | Salesforce x +

goodshepherd.collegeofengi82-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115g000004gAWv/FieldsAndRelationships/new

Search Setup

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SETUP > OBJECT MANAGER

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Step 3. Enter the label and name for the lookup field Step 3 of 6

Previous Next Cancel

Field Label

Field Name

Description

Help Text

Child Relationship Name

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!](#)

Home | Salesforce x Role | Salesforce x +

goodshepherd.collegeofengi82-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115g000004gAW0/FieldsAndRelationships/new

Search Setup

Setup Home Object Manager

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Related Lookup Filters

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Scoping Rules

Triggers

Flow Triggers

Step 1. Choose the field type Step 1

Next Cancel

Specify the type of information that the custom field will contain.

Data Type

Select one of the data types below.

☐ None Selected

☐ Auto Number

☐ Formula

☒ Roll-Up Summary

☐ Lookup Relationship

☐ Master-Detail Relationship

☐ External Lookup Relationship

☐ Checkbox

A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

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.

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.

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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.

Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

Allows users to select a True (checked) or False (unchecked) value.

Home | Salesforce x Role | Salesforce x +

goodshepherd.collegeofengi82-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115g000004gAW0/FieldsAndRelationships/new

Search Setup

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Flow Triggers

Role

New Custom Field

Step 2. Enter the details

Step 2 of 6

Field Label: Record Count

Field Name: Record_Count

Description:

Help Text:

Auto add to custom report type: ☒ Add this field to existing custom report types that contain this entity

Previous Next Cancel

Home | Salesforce x Role | Salesforce x +

goodshepherd.collegeofengi82-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115g000004gAW0/FieldsAndRelationships/new

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Role

New Custom Field

Step 3. Define the summary calculation

Step 3 of 6

Select Object to Summarize

Master Object: Role

Summarized Object: Nick Names

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

Reports | Salesforce

Role | Salesforce

goodshepherdcollegeofengi82-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115g000004gAW0/FieldsAndRelationships/00N5g00000eM4Pp/edit

Search Setup

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Flow Triggers

Select Object to Summarize

Master Object

Role

Summarized Object

Nick Names

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

Nick Name

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.

Save

Cancel

30°C

Hot weather

Search

ENG IN

02:09 PM

01-11-2023

Reports | Salesforce

Role | Salesforce

goodshepherdcollegeofengi82-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115g000004gAW0/FieldsAndRelationships/00N5g00000eM4Pp/view

Search Setup

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Role Custom Field

Record Count

Back to Role

Help for this Page

Custom Field Definition Detail

Edit

Set Field Level Security

View Field Accessibility

Where is this used?

Field Information

Field Label

Record Count

Object Name

Role

Field Name

Record_Count

API Name

Record_Count__c

Description

Help Text

Data Owner

Field Usage

Data Sensitivity Level

Compliance Categorization

Created By

rdhy.martiam.joy, 01/11/2023, 1:44 pm

Modified By

rdhy.martiam.joy, 01/11/2023, 2:23 pm

Roll-Up Summary Options

Data Type

Roll-Up Summary

Summary Type

COUNT

Summarized Object

Nick Name

Filter Criteria

Role Custom Field: Record Count - Salesforce - Developer Edition

30°C

Mostly cloudy

Search

ENG IN

02:22 PM

01-11-2023

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 consists of two screenshots of the Salesforce Setup interface, illustrating the steps to configure security for users.

Top Screenshot: Clone Profile

The browser tabs show: Reports | Salesforce, Role | Salesforce, Profiles | Salesforce. The URL is: goodshepherd.collegeofengi82-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F_u%2Fperms%2Fui%2Fprofile%2FProfileClone%2F%3FretURL%3D...

The left sidebar shows: Setup, Home, Object Manager. The search bar contains "profil". The "Users" section is expanded, showing "Profiles".

The main content area is titled "Clone Profile". It prompts the user to "Enter the name of the new profile." Below this, a message states: "You must select an existing profile to clone from." A dropdown menu shows "Existing Profile" with "Customer Community Login User" selected. Below the dropdown, "User License" is "Customer Community Login" and "Profile Name" is "user A". "Save" and "Cancel" buttons are at the bottom.

Bottom Screenshot: Sharing Settings

The browser tabs show: Reports | Salesforce, Role | Salesforce, Account Settings | Salesforce, Account Settings | Salesforce, Sharing Settings | Salesforce. The URL is: goodshepherd.collegeofengi82-dev-ed.develop.lightning.force.com/lightning/setup/SecuritySharing/page?address=%2Fp%2Fown%2FOrgSharingDetail%3Fsetupid%3DSecuritySharing%26st...

The left sidebar shows: Setup, Home, Object Manager. The search bar contains "SHAR". The "Security" section is expanded, showing "Guest User Sharing Rule Access Report" and "Sharing Settings".

The main content area is titled "Sharing Settings". It displays the organization's sharing settings. A message states: "One or more sharing operations has been initiated. See below for additional details. Certain operations may not be available." Below this, a dropdown menu shows "Manage sharing settings for:" with "Accounts" selected. A button "Disable External Sharing Model" is present. The "Default Sharing Settings" section shows "Organization-Wide Defaults" with an "Edit" button. A table displays the default access settings:

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Account and Contract	Public Read/Write	Private	<input checked="" type="checkbox"/>

The "Other Settings" section includes checkboxes for "Manager Groups" (unchecked), "Secure guest user record access" (checked), and "Require permission to view record names in lookup fields" (unchecked). A "Sharing Rules" section is at the bottom.

Reports | Salesforce x Role | Salesforce x Profiles | Salesforce x +

goodshepherdcollegeofengi82-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F_u%2Fperms%2Fu%2Fprofile%2FprofileClone%2Fe%3FretURL%3D...

Search Setup

Setup Home Object Manager

Search: profil

Users

Profiles

Didn't find what you're looking for? Try using Global Search.

SETUP Profiles

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from. Required Information

Existing Profile: Customer Community Plus User

User License: Customer Community Plus

Profile Name: user B

Save Cancel

30°C Mostly cloudy

Reports | Salesforce x Role | Salesforce x Account Settings | Salesforce x Account Settings | Salesforce x Sharing Settings | Salesforce x +

goodshepherdcollegeofengi82-dev-ed.develop.lightning.force.com/lightning/setup/SecuritySharing/page?address=%2Fsetup%2Fown%2FshareRule.jsp%3FretURL%3D%252F%252Fown%25...

Search Setup

Setup Home Object Manager

Search: SHAR

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

30°C Partly sunny

Reports | Salesforce x Role | Salesforce x Account Settings | Salesforce x Account Settings | Salesforce x Lightning Experience | Salesforce x +

goodshepherdcollegeofengil82-dev-ed.develop.lightning.force.com/lightning/setup/null/page?address=%2Fsetup%2FLayout%2FJs%2F%3Fid%3D000e5g000006dKz%26type%3DAccount%26...

Search Setup

Setup Home Object Manager

prof

Users

Profiles

Didn't find what you're looking for? Try using Global Search.

Account Field Level Security for profile user B

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"/>
	Text	<input checked="" type="checkbox"/>	<input type="checkbox"/>

javascriptsrcUp%27%2Fsetup%2FLayout%2FJs%2F%3Fid%3D000e5g000006dKz%26type%3DAccount%26...

21°C Mostly cloudy

Search

ENG IN 05:01 PM 01-11-2023

Reports | Salesforce x Permission Sets | Salesforce x +

goodshepherdcollegeofengil82-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2Fudd%2FPermissionSet%2Fnew%2FPermissionSetApexp

Search Setup

Setup Home Object Manager

permission

Users

Permission Set Groups

Permission Sets

Custom Code

Custom Permissions

Didn't find what you're looking for? Try using Global Search.

Permission Sets Create

Save Cancel

Enter permission set information

Label user A

API Name user_A

Description

Session Activation Required ☐

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

23°C Partly sunny

Search

ENG IN 05:09 PM 01-11-2023

Reports | Salesforce

Role | Salesforce

Account Settings | Salesforce

Account Settings | Salesforce

Lightning Experience | Salesforce

goodshepherdcollegeofengil82-dev-ed.develop.lightning.force.com/lightning/setup/null/page?address=%2Fsetup%2Flayout%2Fflsedit.jsp%3Fid%3D00e5g000006dk2k%26type%3DAccount%...

Setup

HomeObject Manager

prof

Users

Profiles

Didn't find what you're looking for?
Try using Global Search.

SETUP

Account Field Level Security for profile
user A

SaveCancel

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"/>
	Text	<input checked="" type="checkbox"/>	<input type="checkbox"/>

21°C
Mostly cloudy

Search

ENG
IN

05:00 PM
01.11.2023

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 'MANAGE ASSIGNMENT EXPIRATION' page for 'user A'. It allows selecting an expiration option for assigned users. The 'No expiration date' option is selected. Below, a table lists selected users.

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

The second screenshot shows the 'Permission Sets' page for 'user A'. It displays the 'Object Permissions' for the 'Accounts' object.

Permission Name	Enabled
Read	✓
Create	✓
Edit	✓
Delete	✓
View All	✓
Modify All	✓

Reports | Salesforce

Permission Sets | Salesforce

+

goodshepherdcollegeofengil82-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/0P55g00000BONGx/PermissionSetAssignment/new

Search Setup

Setup

Home

Object Manager

user

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Service

Embedded Service

Messaging for In-App and Web User Verification

User Interface

Action Link Templates

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

☐


 Chatter Expert

Chatter


chatty.00d5g00000kihq5eal.bkrohnjehxqj@chatter.salesforce.com

☒

Chatter Free User



☐


 Integration User

integ


integration@00d5g00000kihq5eal.com

☒

Analytics Cloud Integration User



☐


 ridhy mariyam joy

rjoy


ridhy@good.com

☒

System Administrator



☒


 Security User

sec

insightssecurity@00d5g00000kihq5eal.com

☒

Analytics Cloud Security User



Cancel

Next

29°C

Partly sunny

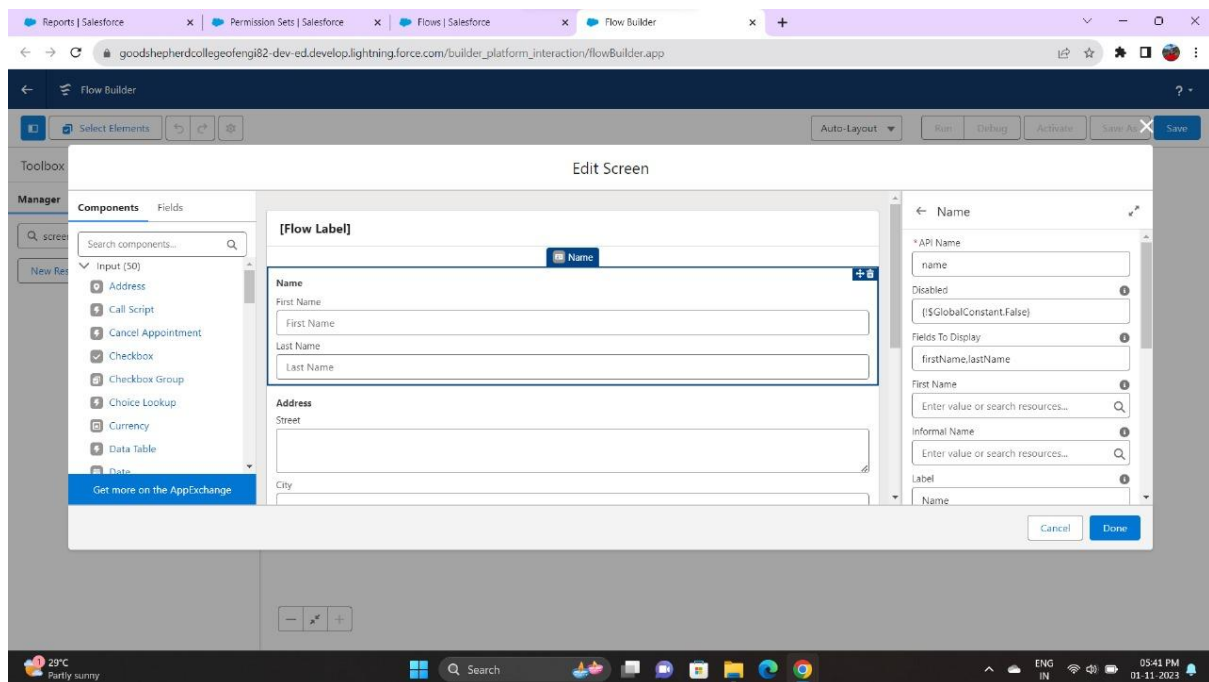
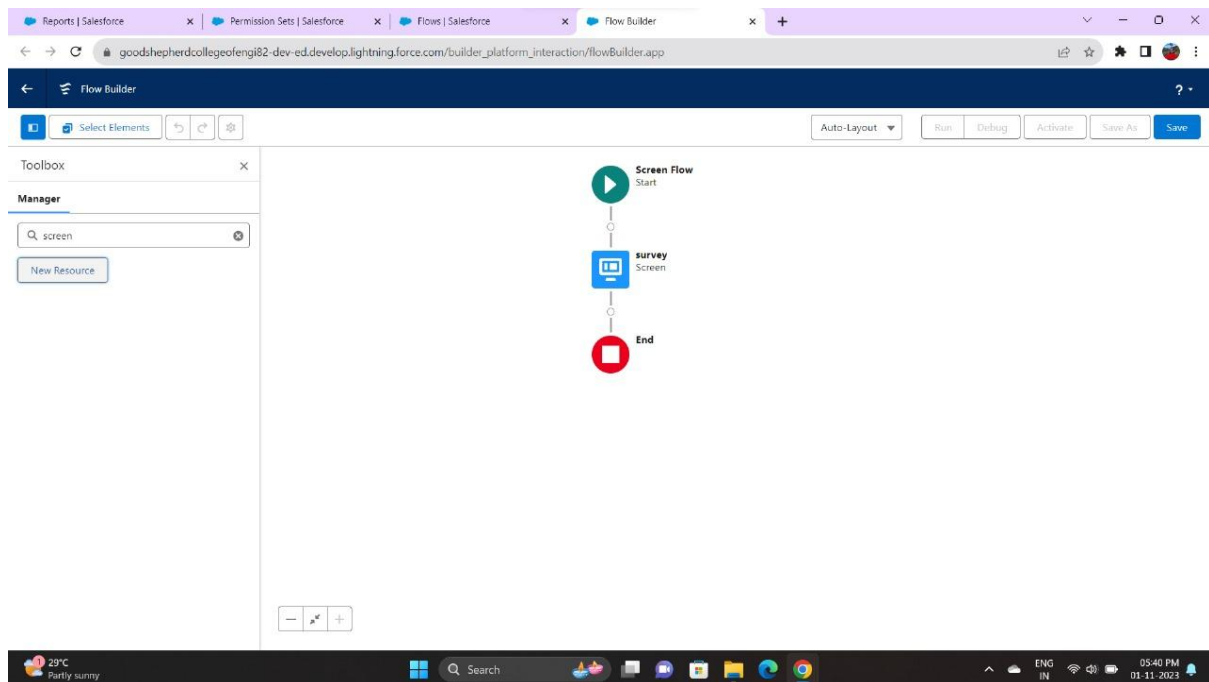
Search

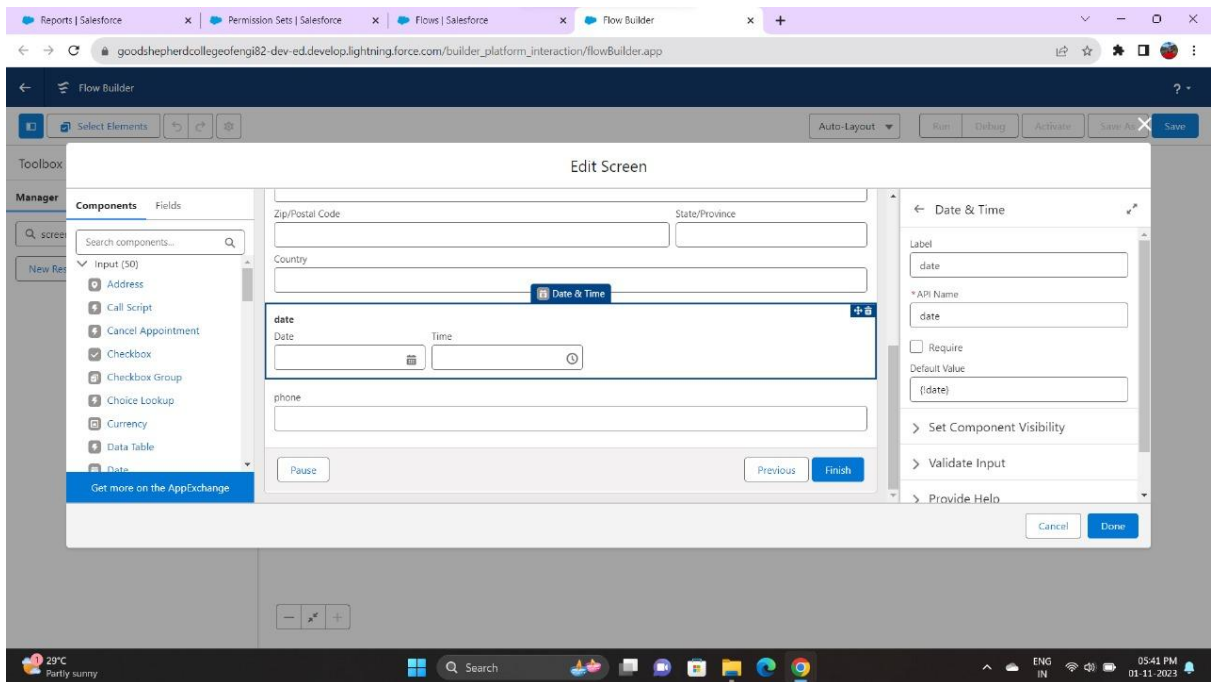
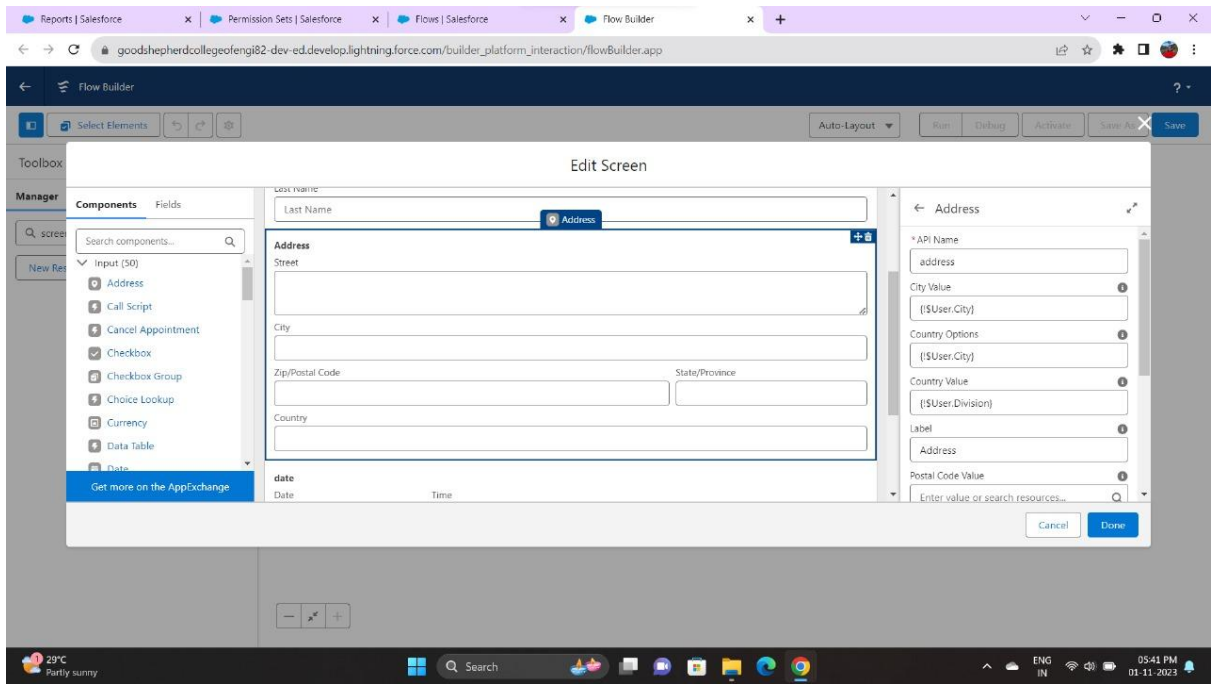
ENG IN

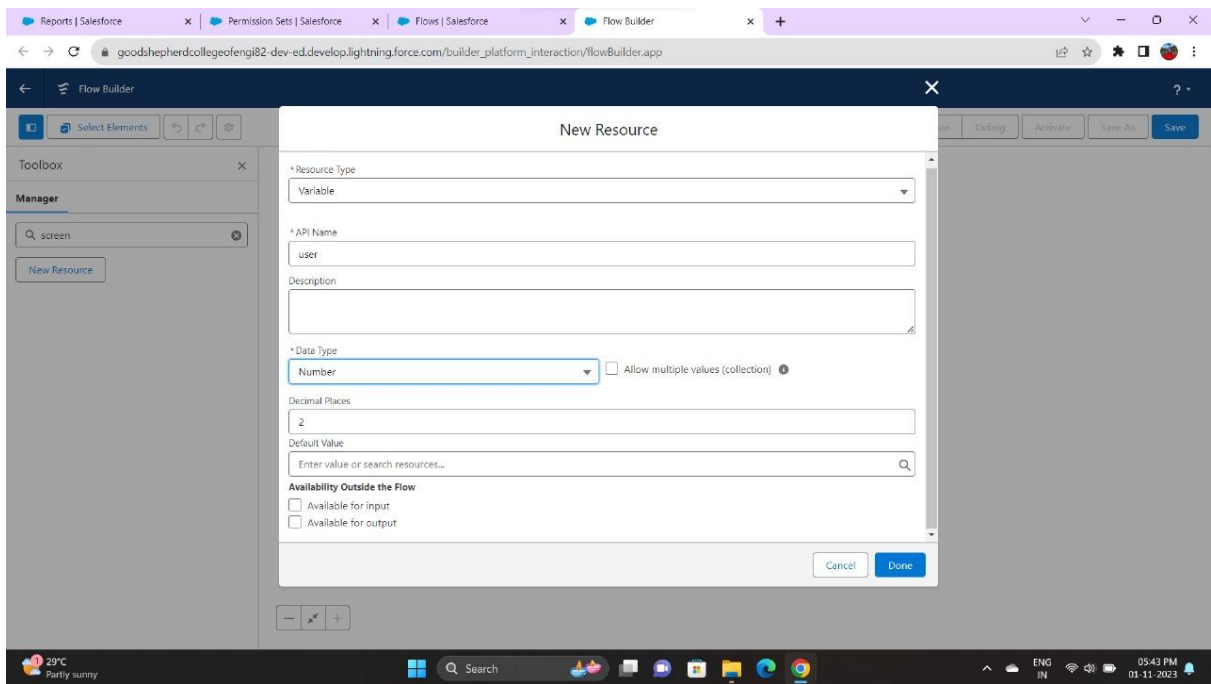
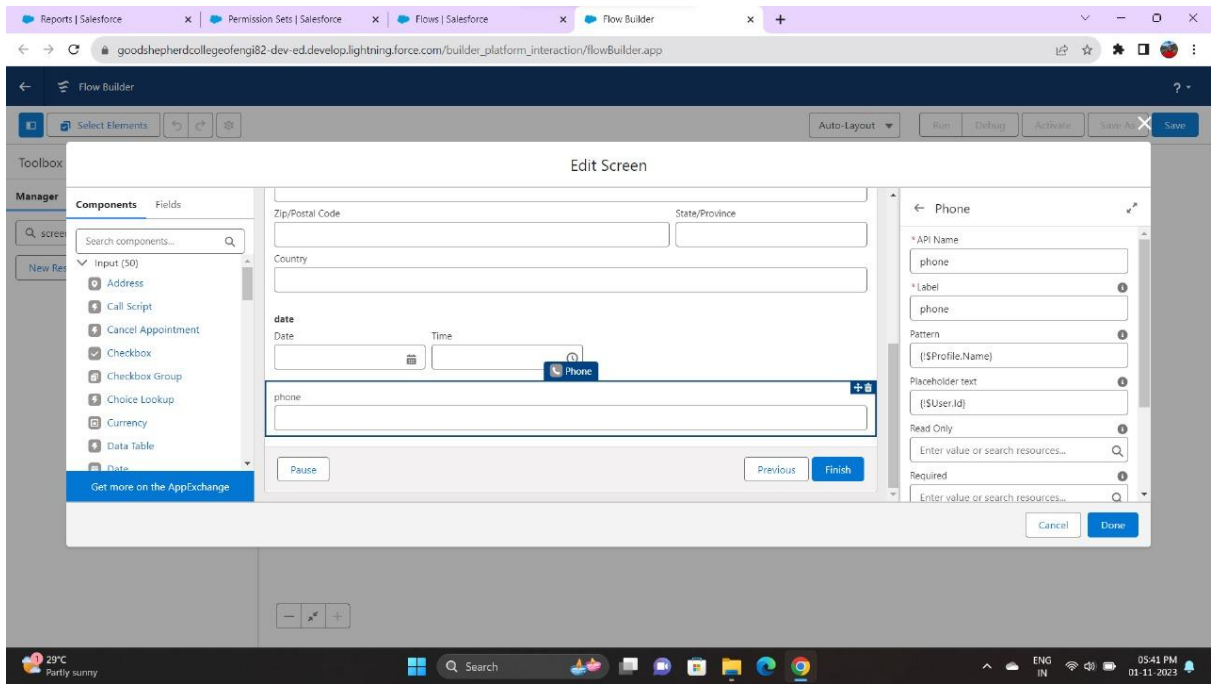
05:24 PM

01.11.2023

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







Reports | SalesforcePermission Sets | SalesforceFlows | Salesforce

survey - V2

goodshepherdcollegeofengi82-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.app?flowId=3015g000002TFYdAAO

Flow Builder

survey - V2

Your flow was activated.

Auto-Layout

Version 2: Active—Last modified in a few seconds

Run

Debug

Deactivate

Save As

Save

Toolbox

Manager

Search this flow...

New Resource

RESOURCES

Screen Components (4)

address

date

name

phone

Variables (1)

user

ELEMENTS

Screens (1)

survey

Screen Flow

Start

survey

Screen

End

30°C

Rain tonight

Search

ENG

IN

05:46 PM

01.11.2023