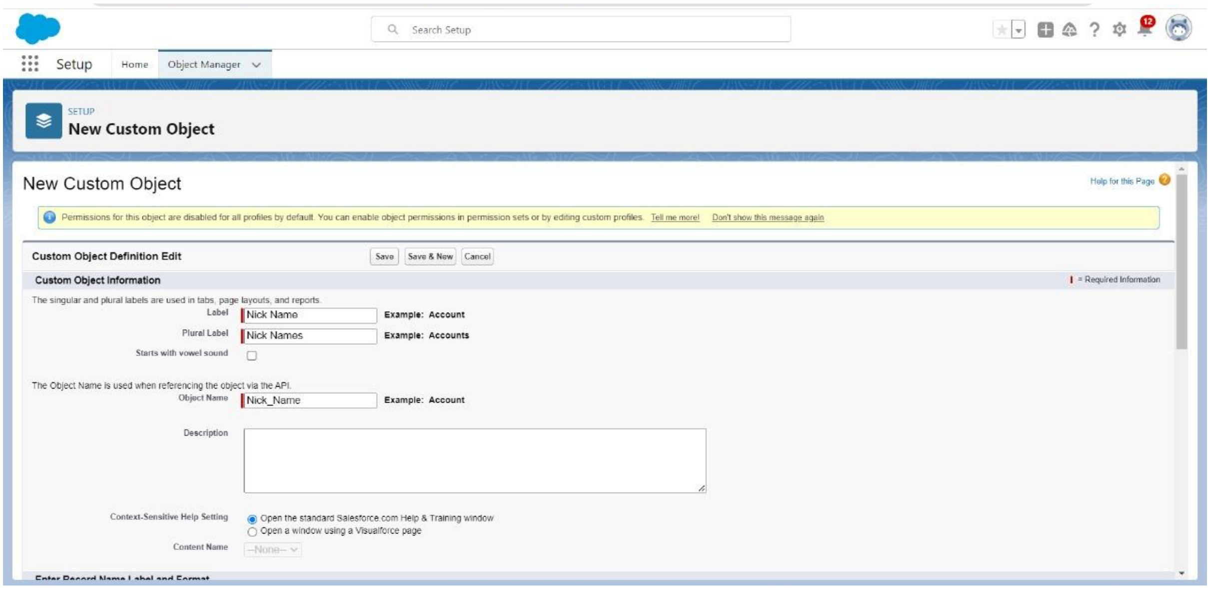
ASSIGNMENT

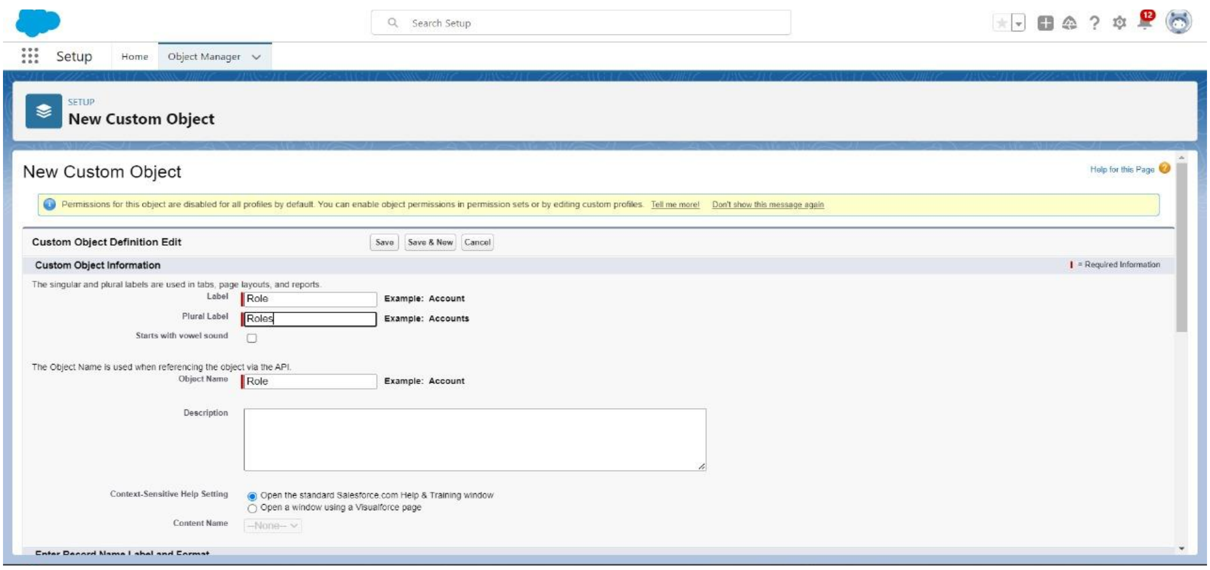
SUBMITTED BY

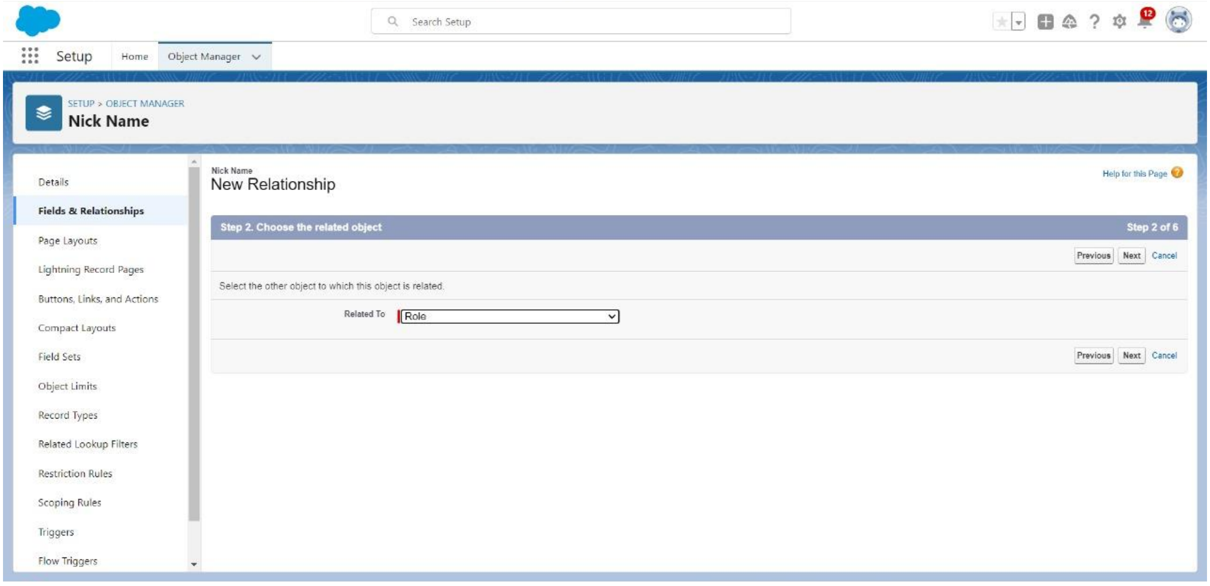
AVANI ANIL

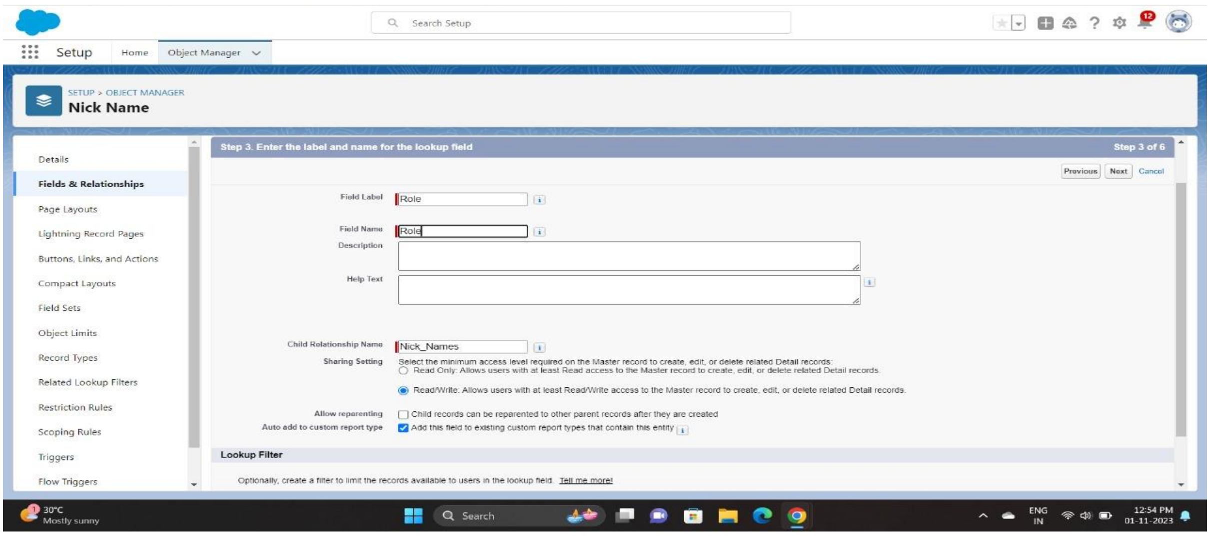
NMID:783901AC6AA34838C2A4F9FED0277AF4

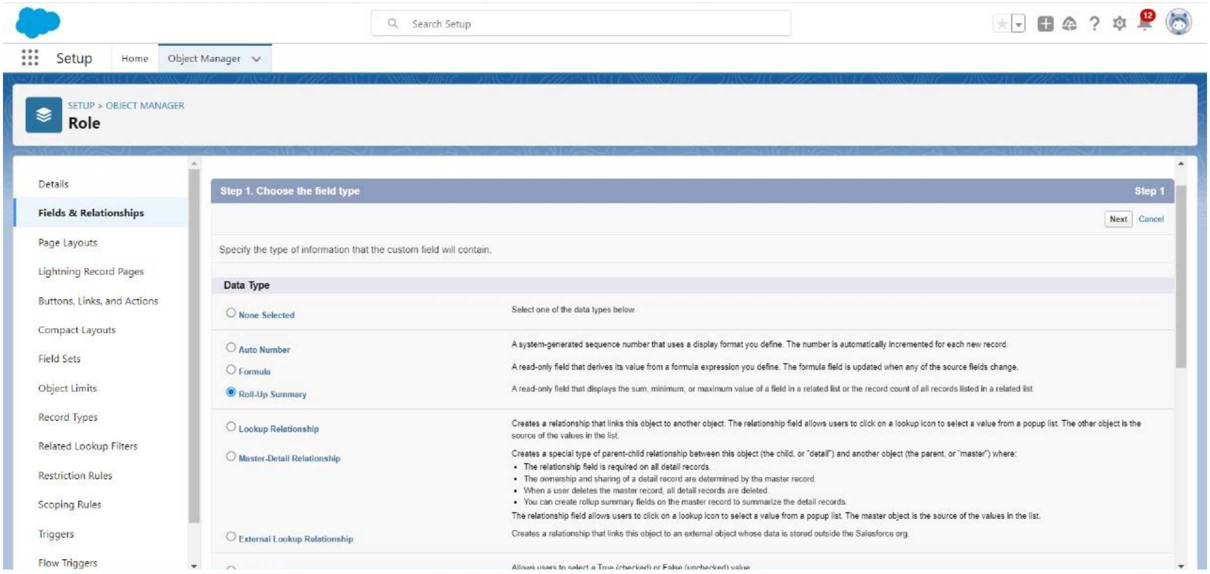
1.Create a Master-Detail Relationship between two Custom objects and also create a Roll Up Summary Field to Calculate total number of records.

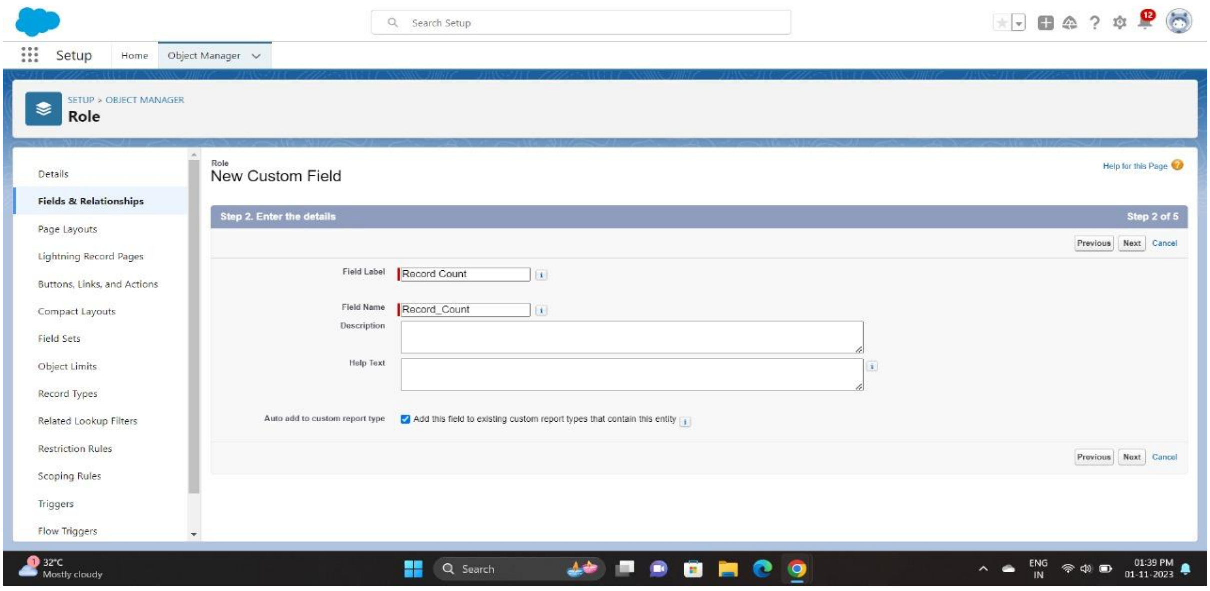


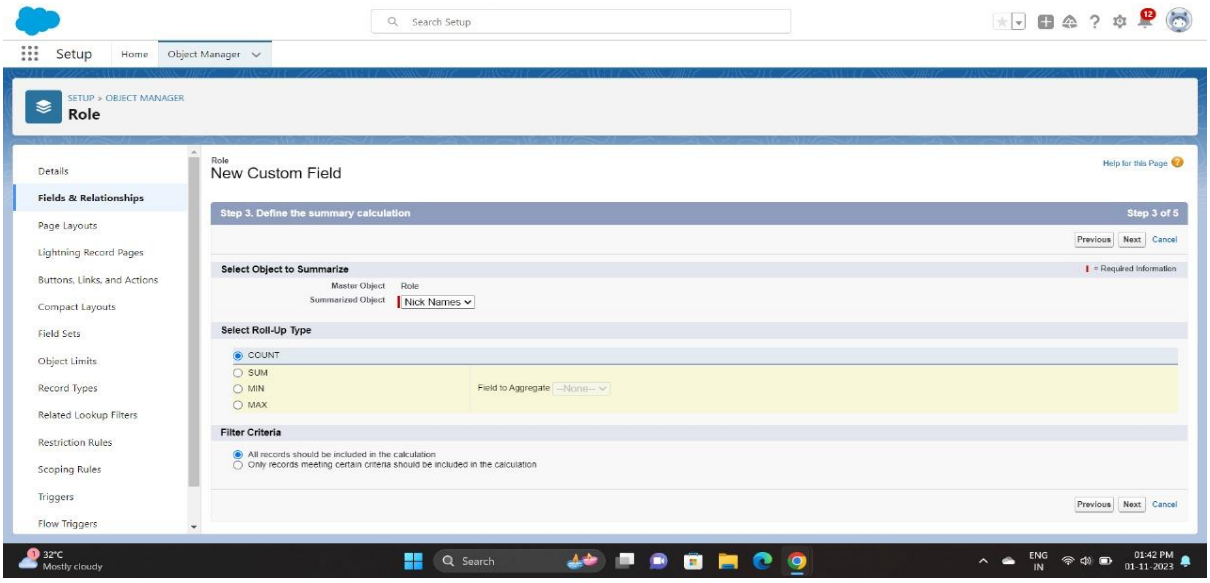


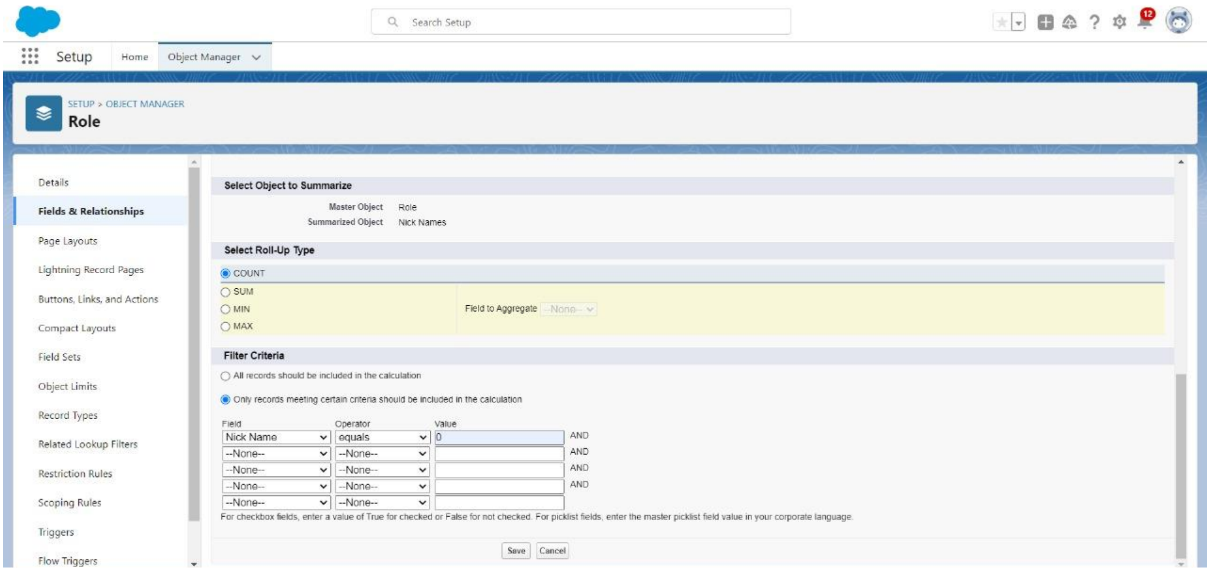

Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Nick Name
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Triggers
Flow Triggers
Nick 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

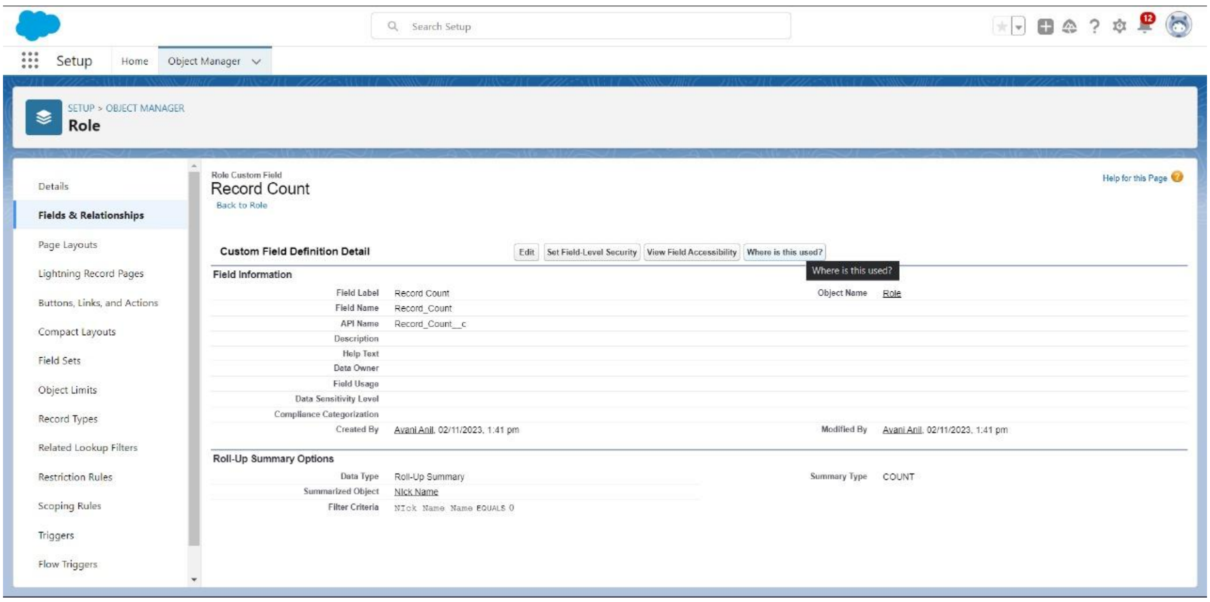

Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Nick Name
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Triggers
Flow Triggers
Step 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
Nick_Names
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!
30°C
Mostly sunny
Search
ENG
IN
12:54 PM
01-11-2023


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
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.
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.

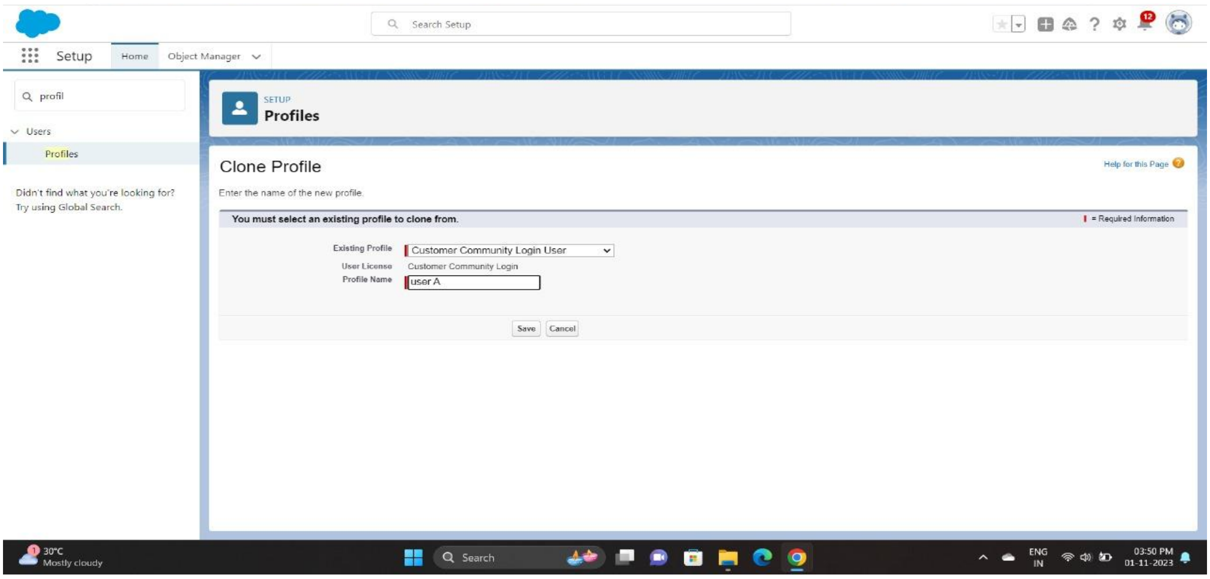

Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Role
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Triggers
Flow Triggers
Role
New Custom Field
Help for this Page
Step 2. Enter the details
Step 2 of 5
Previous
Next
Cancel
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
32°C
Mostly cloudy
Search
ENG
IN
01:39 PM
01-11-2023

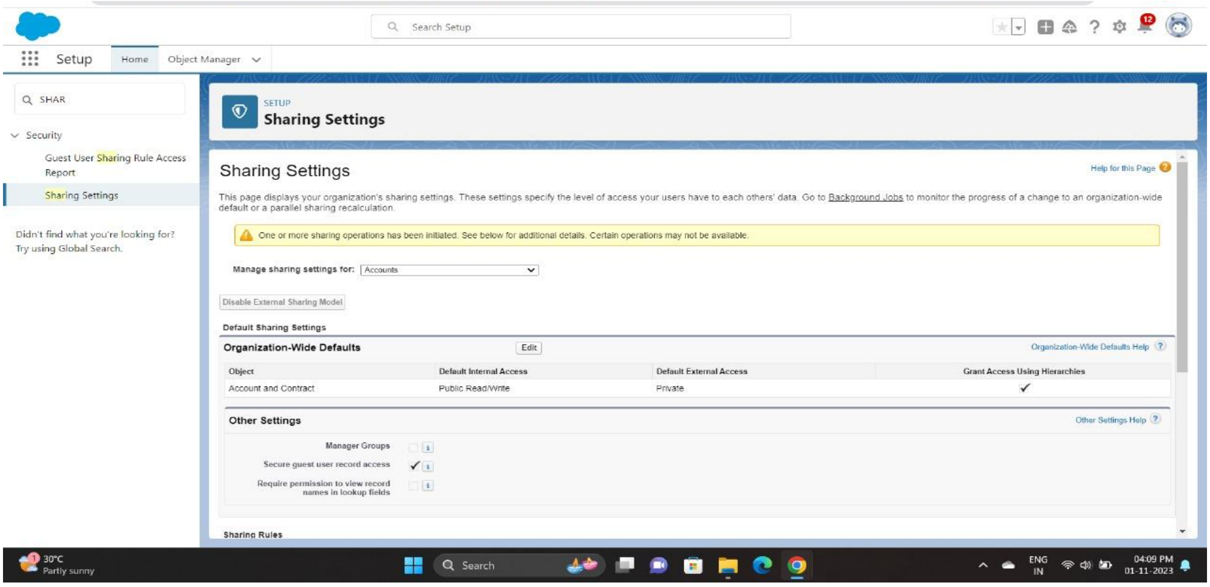

Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Role
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Triggers
Flow Triggers
Role
New 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
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
32°C
Mostly cloudy
Search
ENG
IN
01:42 PM
01-11-2023

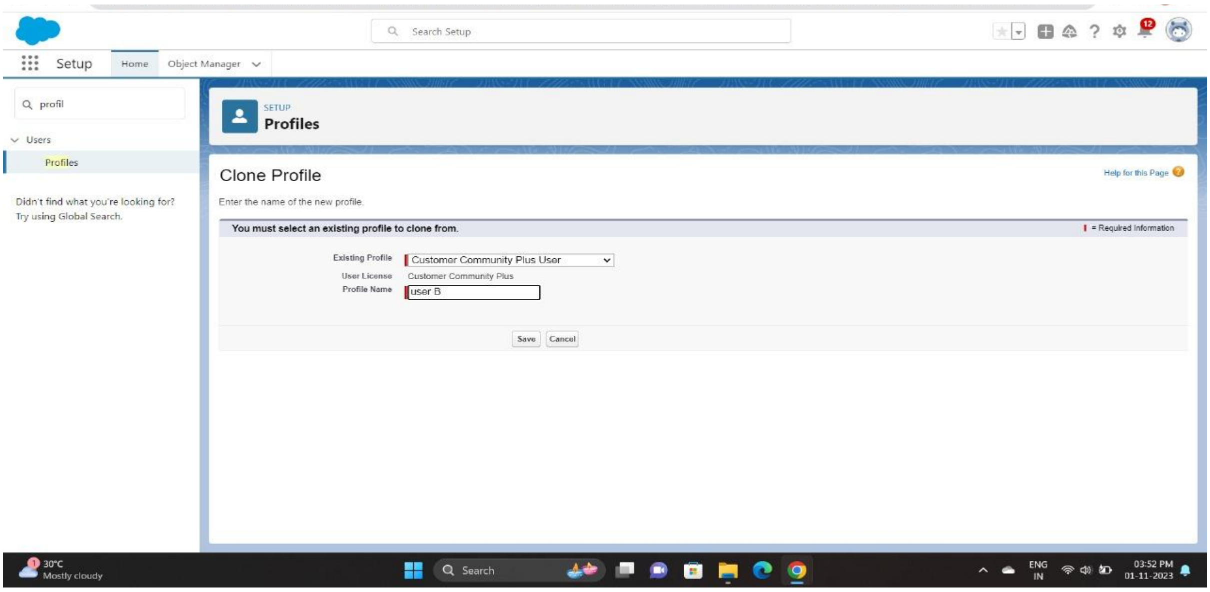

Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Role
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Triggers
Flow Triggers
Select 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
Nick Name
equals
0
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

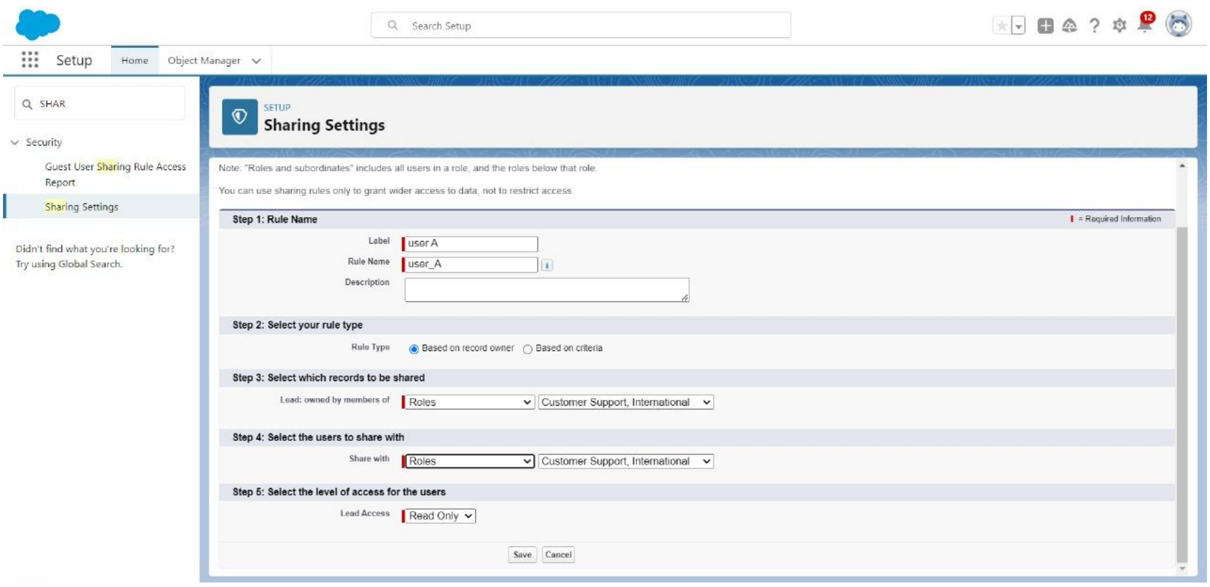

Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Role
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Triggers
Flow Triggers
Role Custom 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
Avani Anil, 02/11/2023, 1:41 pm
Modified By
Avani Anil, 02/11/2023, 1:41 pm
Roll-Up Summary Options
Data Type
Roll-Up Summary
Summary Type
COUNT
Summarized Object
Nick Name
Filter Criteria
Nick Name Name EQUALS 0

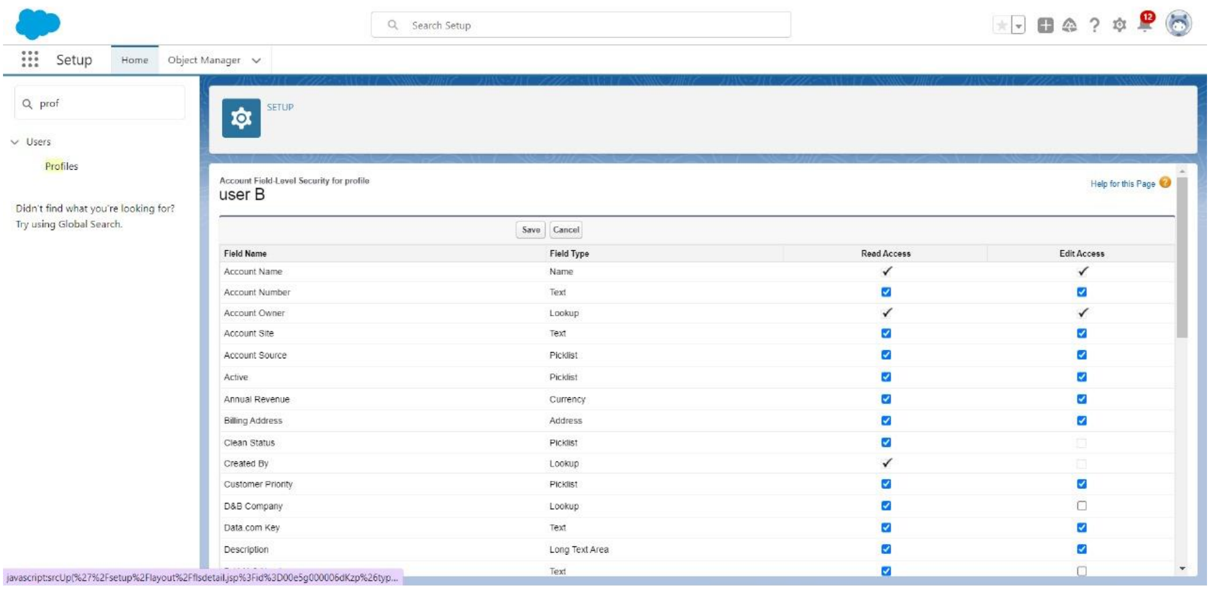
2. If there is 2 user, User A and User B in the organization and we want in Account object that User A should not see the User B Record and user B should not see User A record then apply th Security for the users

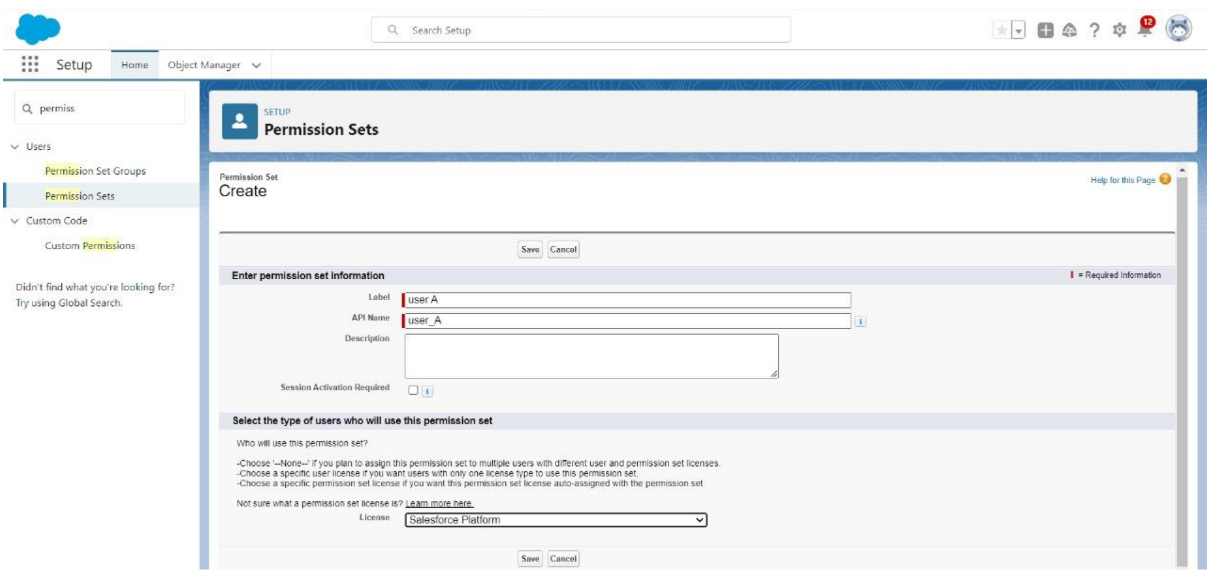


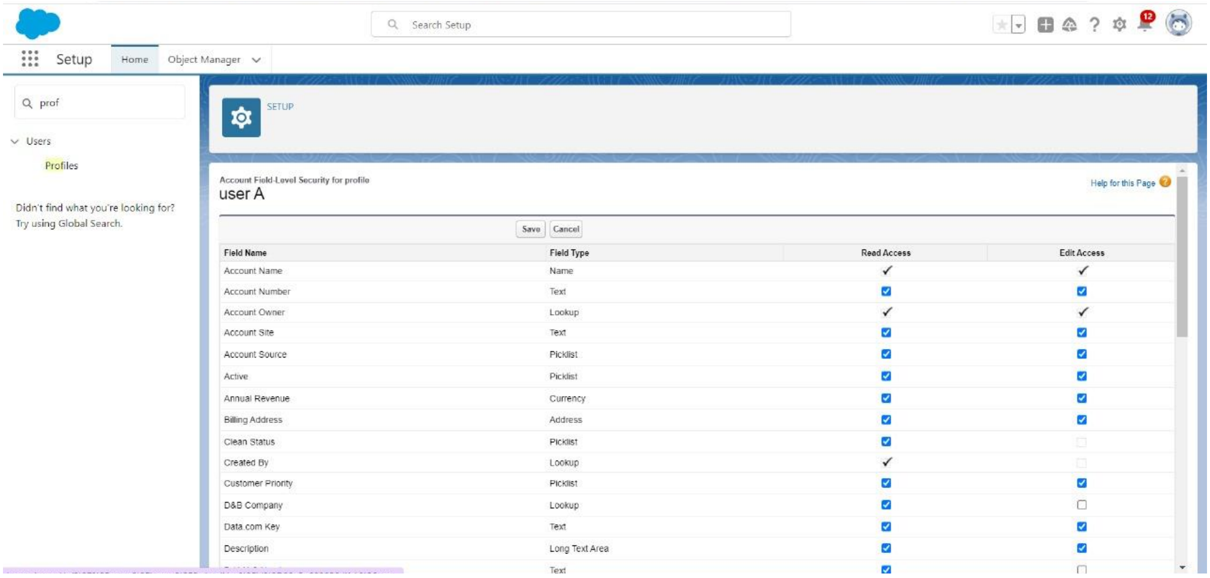

Search Setup
Setup
Home
Object Manager
SHAR
Security
Guest User Sharing Rule Access Report
Sharing Settings
Didn't find what you're looking for? Try using Global Search.
SETUP
Sharing Settings
Sharing Settings
Help for this Page
This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data. Go to Background Jobs to monitor the progress of a change to an organization-wide default or a parallel sharing recalculation.
One or more sharing operations has been initiated. See below for additional details. Certain operations may not be available.
Manage sharing settings for: Accounts
Disable External Sharing Model
Default Sharing Settings
Organization-Wide Defaults
Edit
Organization-Wide Defaults Help
Object
Default Internal Access
Default External Access
Grant Access Using Hierarchies
Account and Contract
Public Read/Write
Private
Other Settings
Other Settings Help
Manager Groups
Secure guest user record access
Require permission to view record names in lookup fields
Sharing Rules
30°C
Partly sunny
Search
ENG
IN
04:09 PM
01-11-2023


Search Setup
Setup
Home
Object Manager
profil
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 User
User License
Customer Community Plus
Profile Name
user B
Save
Cancel
30°C
Mostly cloudy
Search
ENG
IN
03:52 PM
01-11-2023

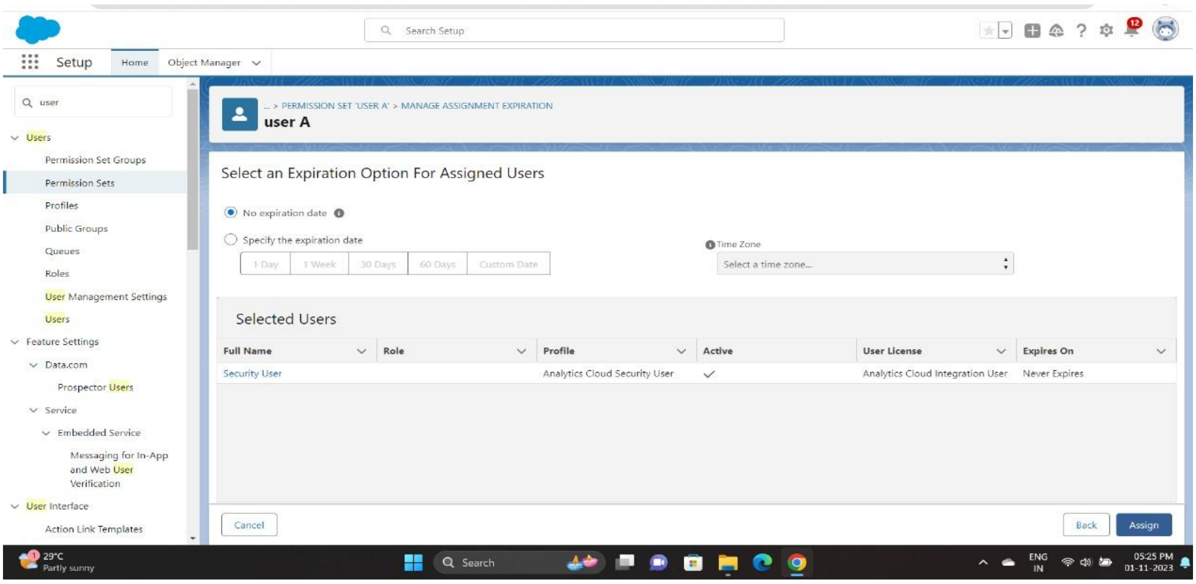

Search Setup
Setup
Home
Object Manager
SHAR
Security
Guest User Sharing Rule Access Report
Sharing Settings
Didn't find what you're looking for? Try using Global Search.
SETUP
Sharing Settings
Note: "Roles and subordinates" includes all users in a role, and the roles below that role.
You can use sharing rules only to grant wider access to data, not to restrict access.
Step 1: Rule Name
= 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

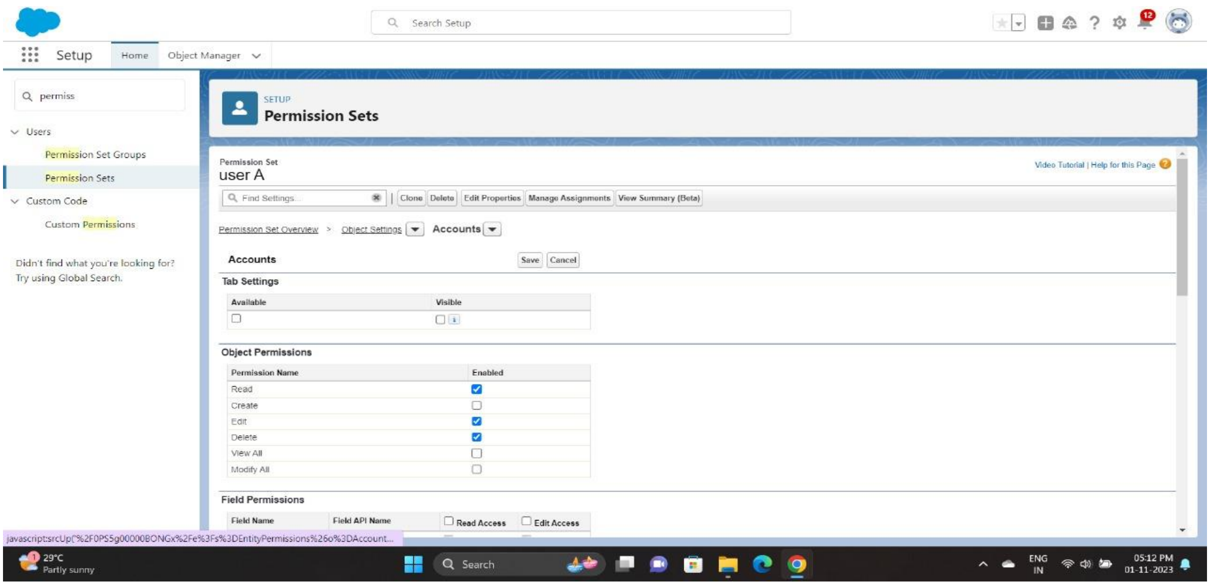

Search Setup
Setup
Home
Object Manager
prof
Users
Profiles
Didn't find what you're looking for? Try using Global Search.
SETUP
Account Field-Level Security for profile
user B
Help for this Page
Save
Cancel
Field Name
Field Type
Read Access
Edit Access
Account Name
Name
Account Number
Text
Account Owner
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
Text
javascript:srcUp(%27%2Fsetup%2Flayout%2Fflsdetail.jsp%3Fid%3D00e5g000006dKzp%26typ...

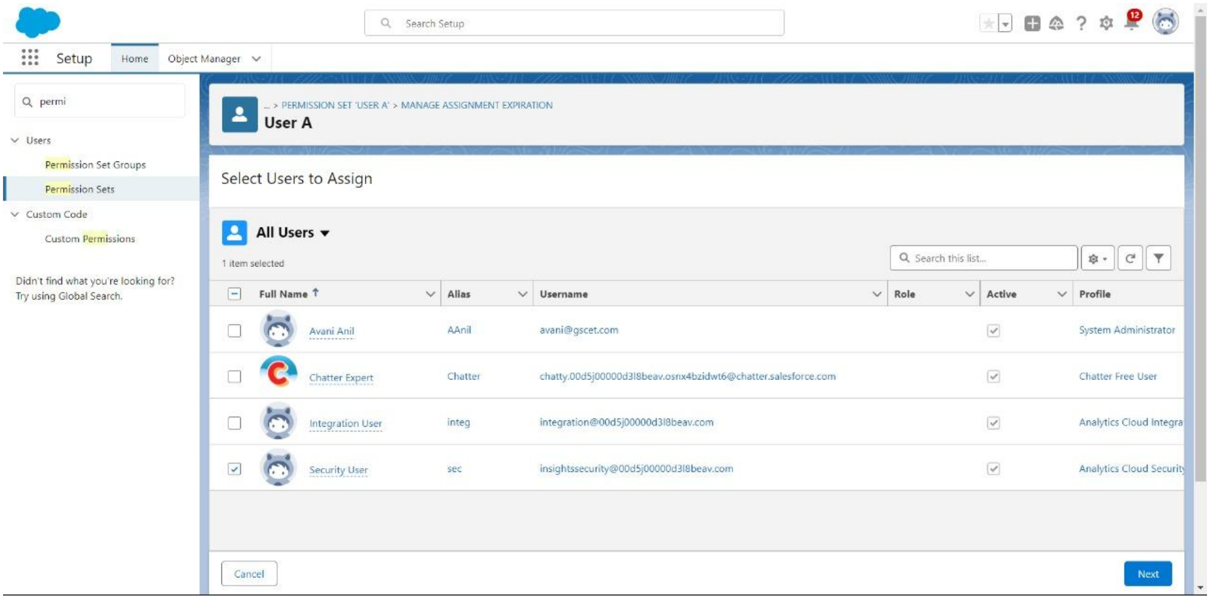

Search Setup
Setup
Home
Object Manager
permiss
Users
Permission Set Groups
Permission Sets
Custom Code
Custom Permissions
Didn't find what you're looking for? Try using Global Search.
SETUP
Permission Sets
Permission Set
Create
Help for this Page
Save
Cancel
Enter permission set information
= Required Information
Label
user A
API Name
user_A
Description
Session Activation Required
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



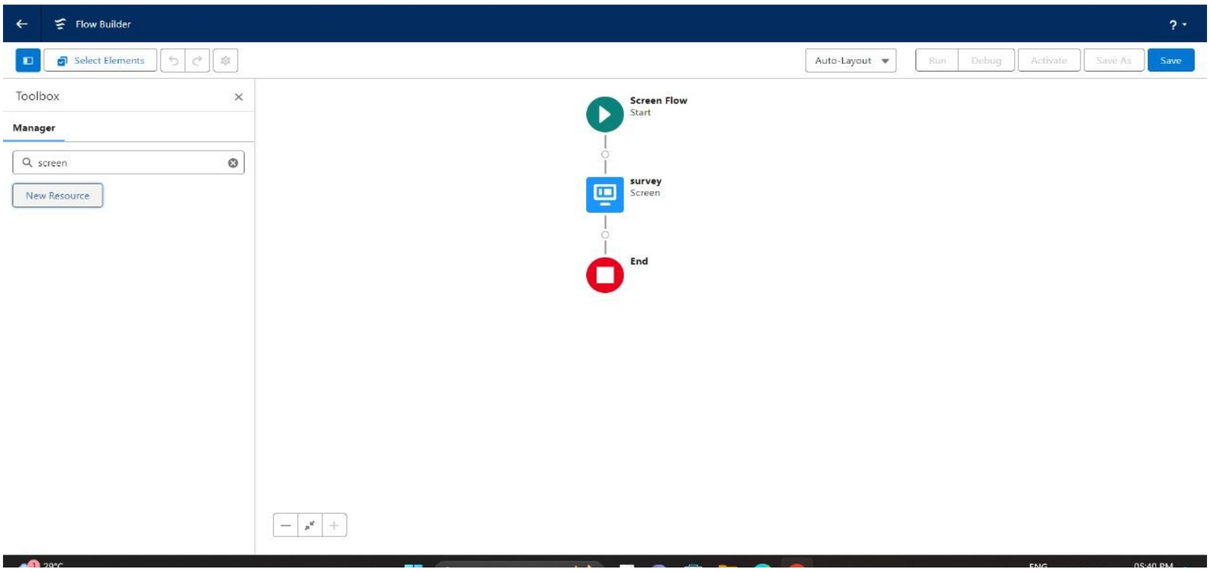
3. Suppose there are 2 Users and they are having Create, Read, Edit access on Account Object with the same profile but we want to open up the access for one user to delete how will you implement the Security setting.

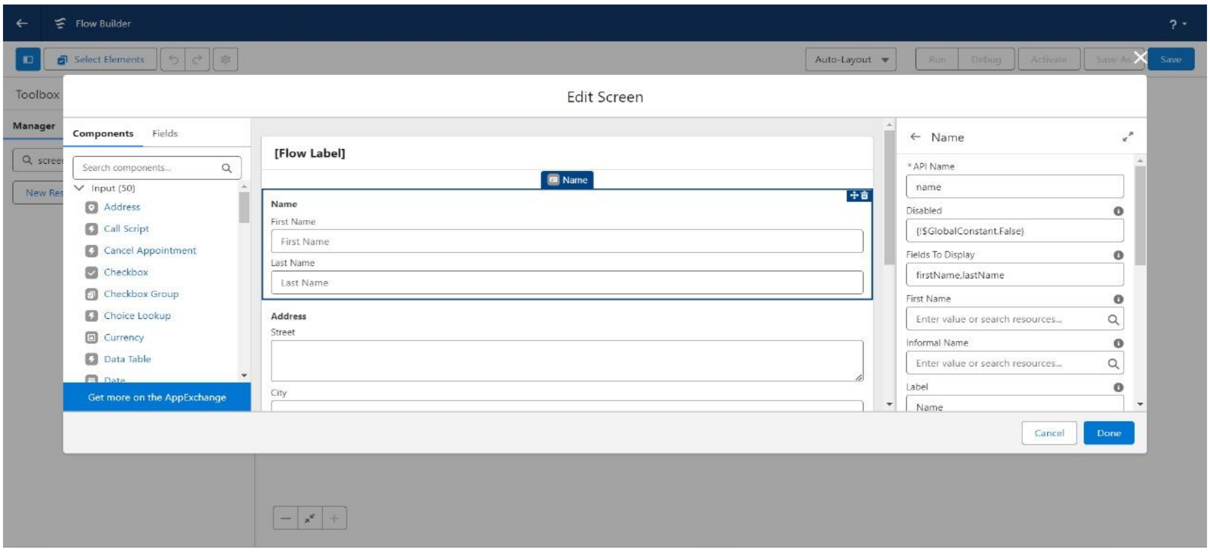


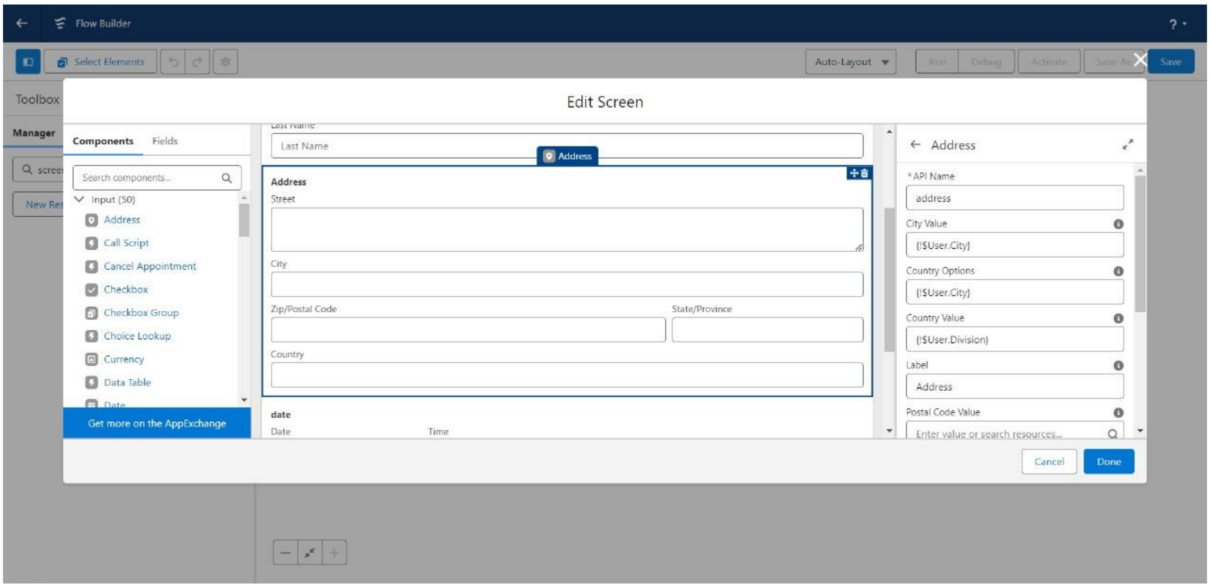


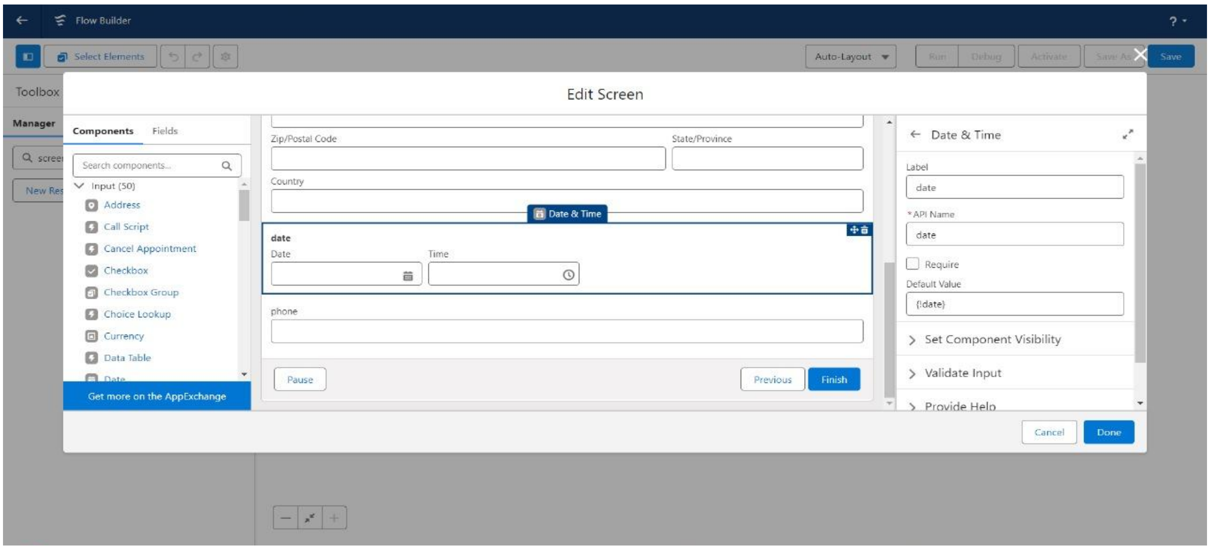


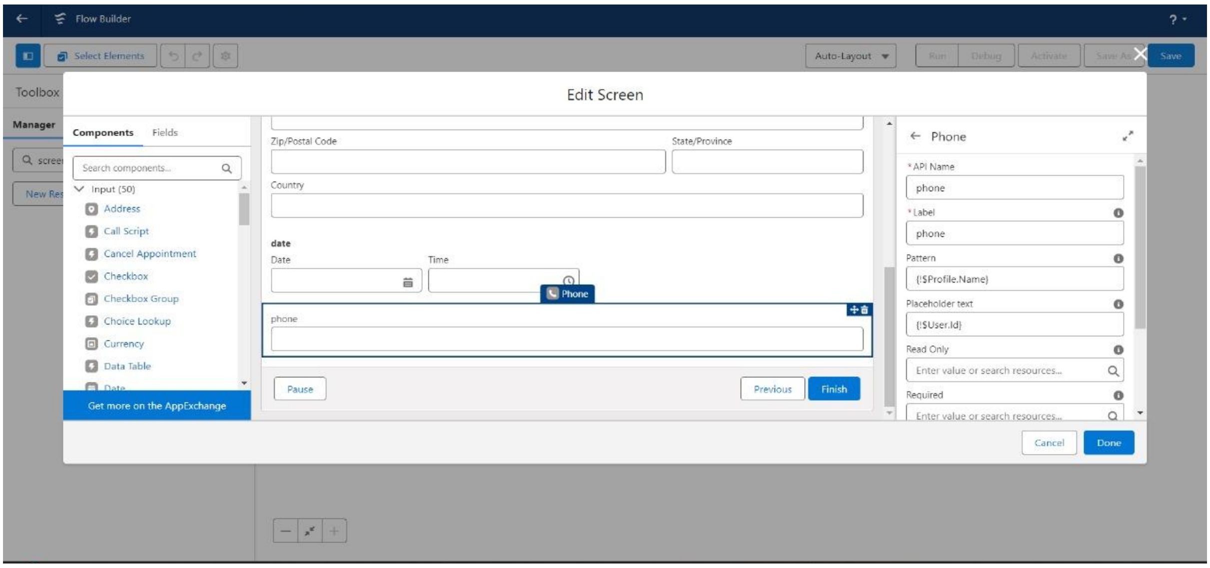
4.Create a screen flow for a basic survey to fill in the details for any form.

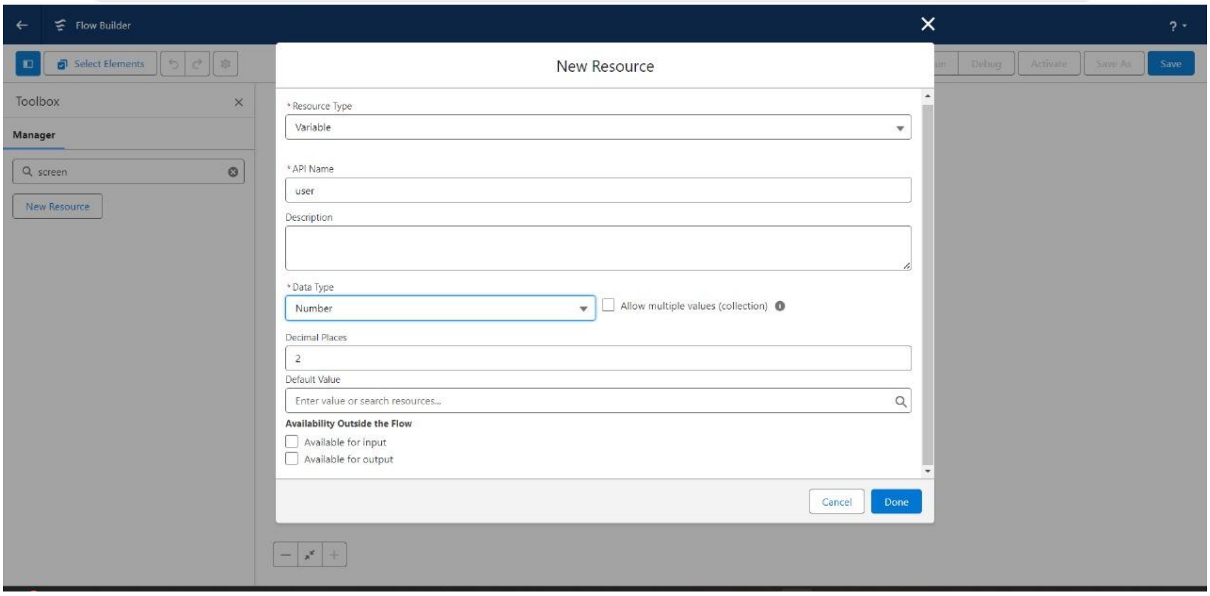

Flow Builder
Select Elements
Auto-Layout
Run
Debug
Activate
Save As
Save
Toolbox
Manager
screen
New Resource
Screen Flow
Start
survey
Screen
End

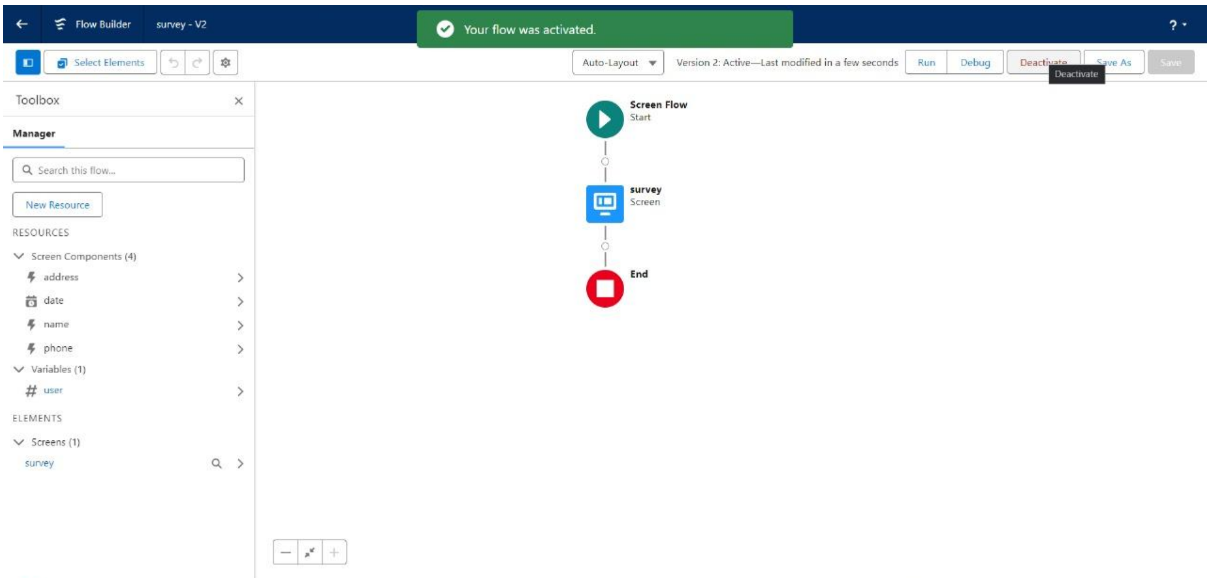

Flow Builder
Edit Screen
Components
Fields
Search components...
Input (50)
Address
Call Script
Cancel Appointment
Checkbox
Checkbox Group
Choice Lookup
Currency
Data Table
Get more on the AppExchange
[Flow Label]
Name
First Name
Last Name
Address
Street
City
Name
* API Name
name
Disabled
{!$GlobalConstant.False}
Fields To Display
firstName,lastName
First Name
Enter value or search resources...
Informal Name
Label
Cancel
Done


Flow Builder
Edit Screen
Components
Fields
Address
Call Script
Cancel Appointment
Checkbox
Checkbox Group
Choice Lookup
Currency
Data Table
Get more on the AppExchange
Last Name
Address
Street
City
Zip/Postal Code
State/Province
Country
date
API Name
address
City Value
{!$User.City}
Country Options
Country Value
{!$User.Division}
Label
Postal Code Value
Cancel
Done


Flow Builder
Edit Screen
Components
Fields
Address
Call Script
Cancel Appointment
Checkbox
Checkbox Group
Choice Lookup
Currency
Data Table
Get more on the AppExchange
Date & Time
date
Date
Time
phone
Pause
Previous
Finish
Label
API Name
Require
Default Value
{!date}
Set Component Visibility
Validate Input
Provide Help
Cancel
Done


Flow Builder
Select Elements
Auto-Layout
Run
Debug
Activate
Save
Toolbox
Manager
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
Enter value or search resources...
Cancel
Done


Flow Builder
Select Elements
Debug
Activate
Save As
Save
Toolbox
Manager
screen
New Resource
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


Flow Builder
survey - V2
Your flow was activated.
Select Elements
Auto-Layout
Version 2: Active—Last modified in a few seconds
Run
Debug
Deactivate
Save As
Save
Deactivate
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