

Naan Mudhalvan Salesforce Developer (Course) Assignment

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Year and Dept: 4th year and CSE

Batch: 2024

Zone.no: Zone 8

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

WhatsApp

New Custom Object (Sales)

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

GmailYouTubeMapsGlobal NetAcadL...Edube Interactive...

Search Setup

SetupHomeObject Manager

SETUP

New Custom Object

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. [Get our report](#) [Don't show this message again](#)

Custom Object Definition Edit

SaveSave & NewCancel

Custom Object Information

Required Information

The singular and plural labels are used in tabs, page layouts, and reports.

LabelCollegeExample: Account

Plural LabelCollegesExample: Accounts

Starts with vowel sound☐

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

Object NameCollegeExample: Account

Description

Context Sensitive Help Setting

☒ Open the standard Salesforce.com Help & Training window

☐ Open a window using a Visualforce page

Content Name

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record NameCollege NameExample: Account Name

New Custom Object (Sales)Sales Force Developer assi...Salesforce

WhatsApp

New Custom Object (Sales)

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

GmailYouTubeMapsGlobal NetAcadL...Edube Interactive...

Search Setup

SetupHomeObject Manager

SETUP

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Custom Object Definition Edit

SaveSave & NewCancel

Custom Object Information

Required Information

The singular and plural labels are used in tabs, page layouts, and reports.

LabelDepartmentExample: Account

Plural LabelDepartmentsExample: Accounts

Starts with vowel sound☐

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

Object NameDepartmentExample: Account

Description

Context Sensitive Help Setting

☒ Open the standard Salesforce.com Help & Training window

☐ Open a window using a Visualforce page

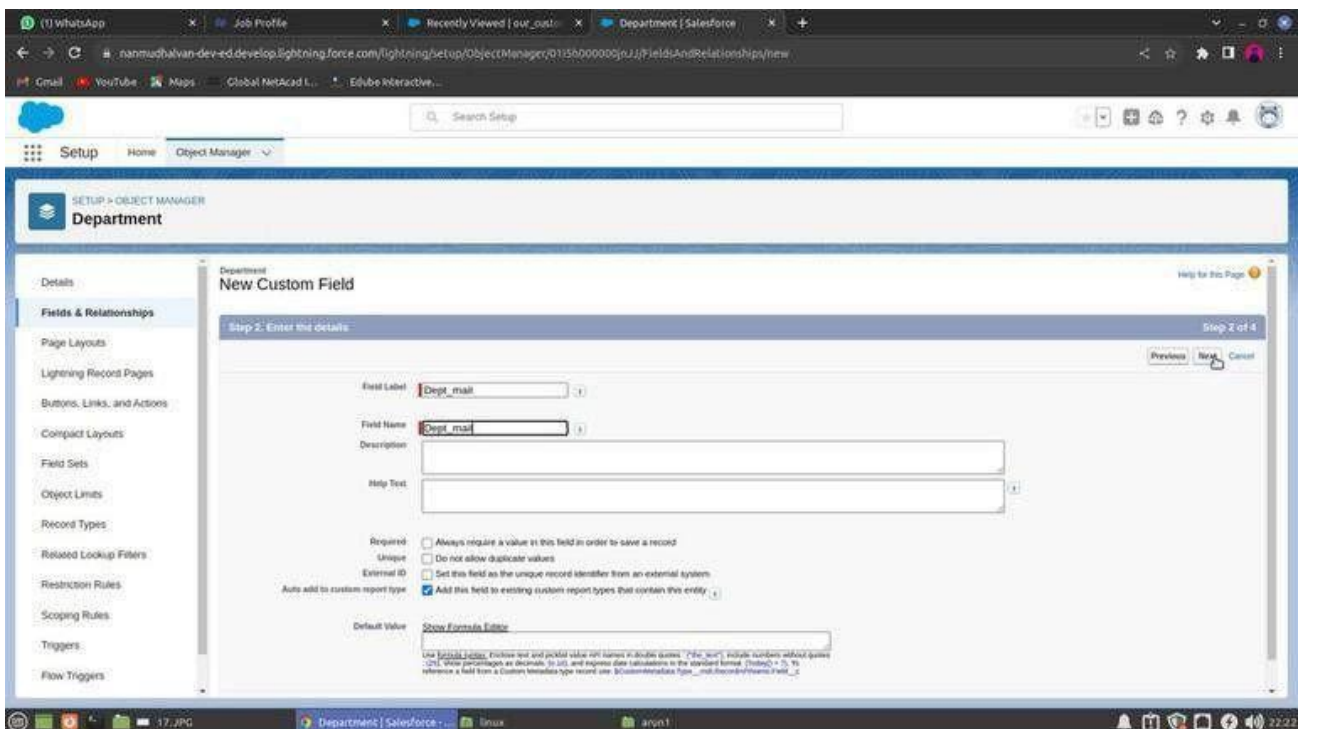
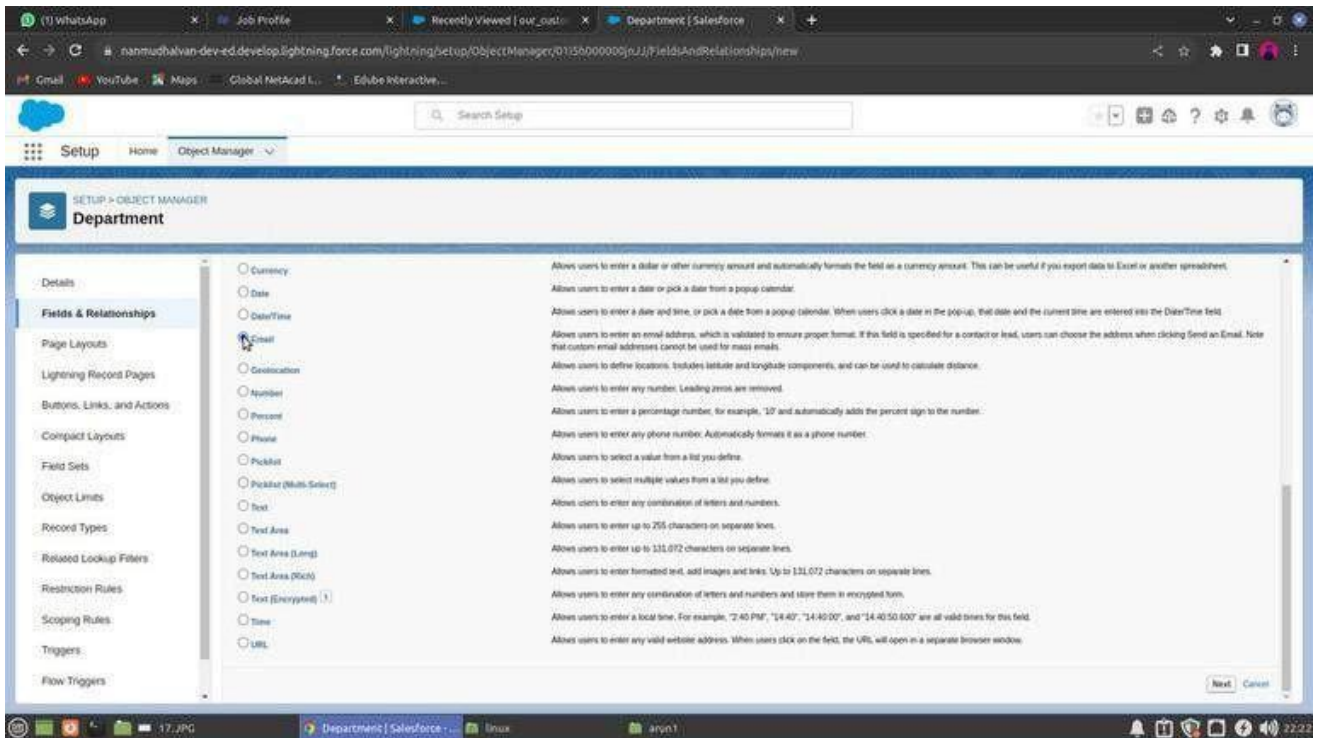
Content Name

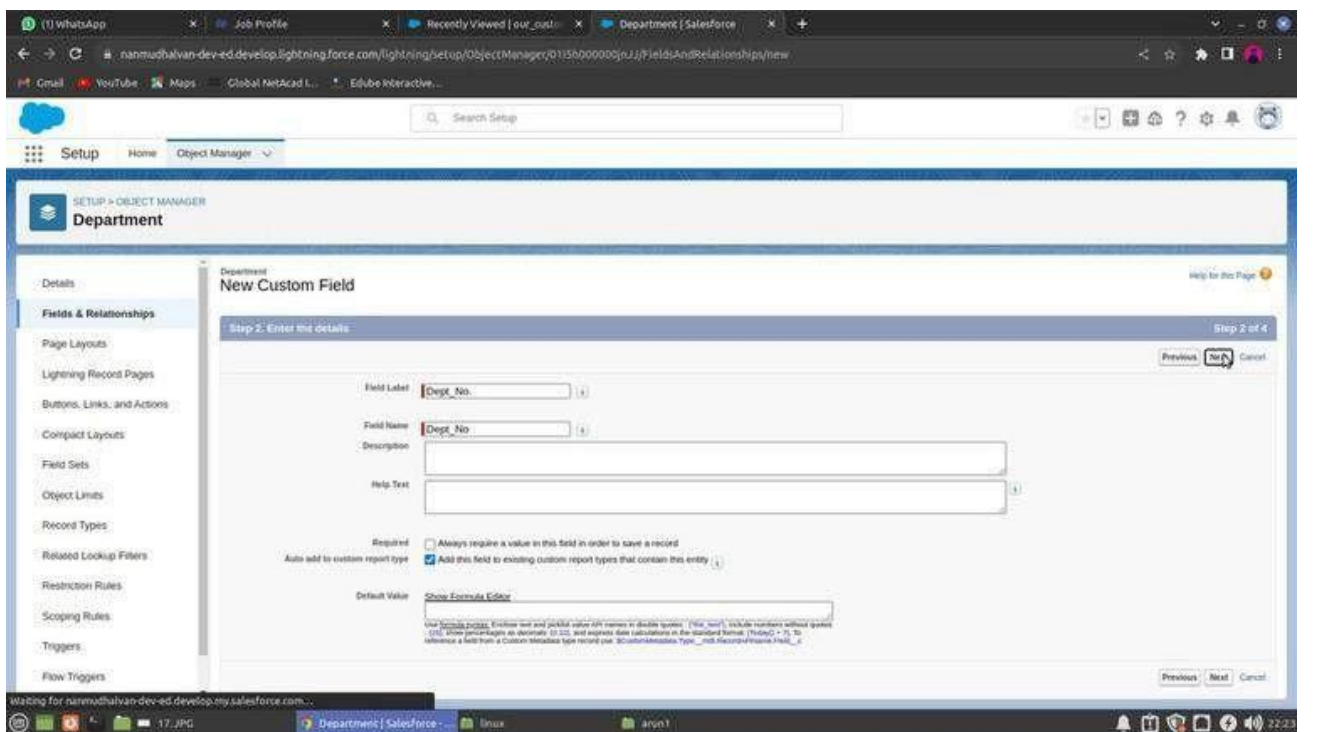
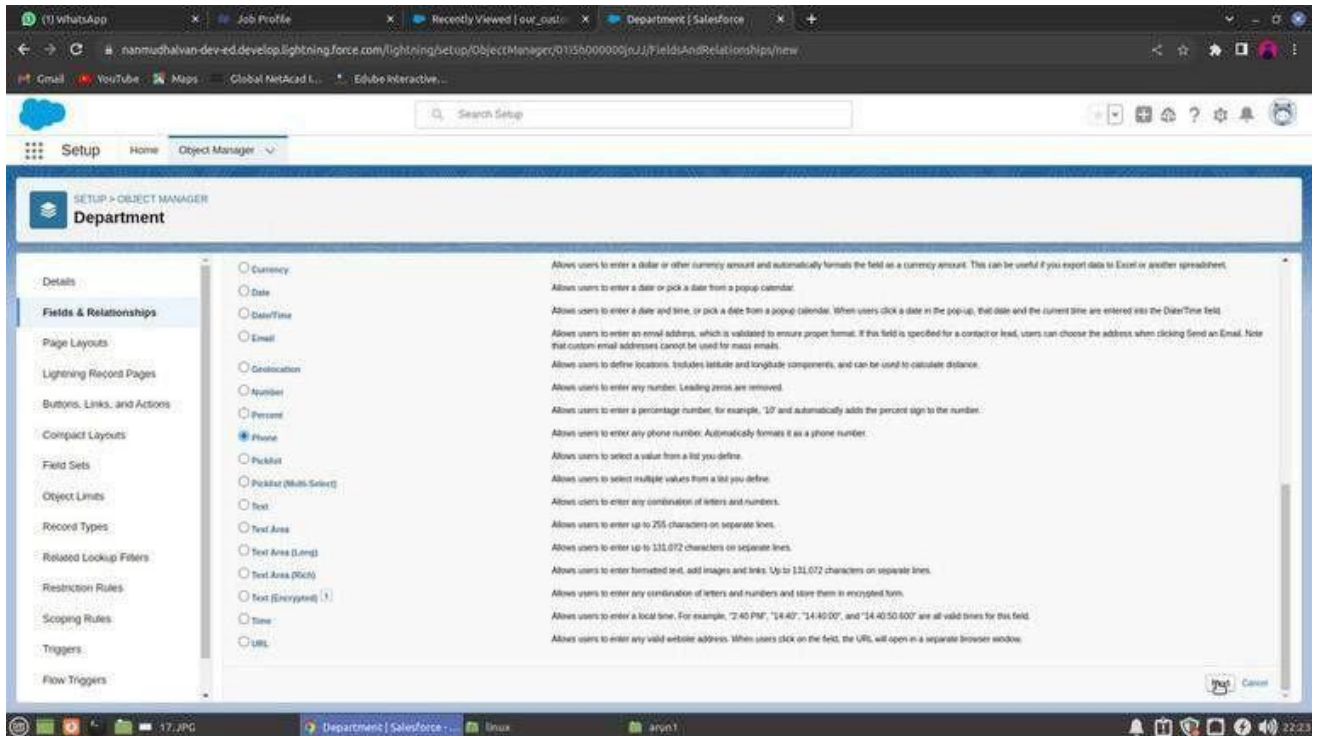
Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name

New Custom Object (Sales)Sales Force Developer assi...Salesforce





Setup Home Object Manager

Department

Details

Fields & Relationships

7 fields, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Department Name	Name	Text(80)		✓
Dept_email	Dept_email__c	Email		
Dept_Phone	Dept_Phone__c	Phone		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Total_Count	Total_Count__c	Roll-Up Summary (COUNT College)		

17.JPG Department | Salesforce Linux any1 22:23

Setup Home Object Manager

Department

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

Full screen help 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 (1) 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 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.

Setup Search Setup

Setup Home Object Manager

Department

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

Department

New Relationship

Step 6: Add custom related lists

Step 6 of 6

Previous Save & New Save Cancel

Field Label	Code
Data Type	Master-Detail
Field Name	College
Description	

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"/>	College Layout

☒ Append related list to users' existing personal customizations

Previous Save & New Save Cancel

Setup Search Setup

Setup Home Object Manager

College

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

College

Date 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

☐

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 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.

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.

Setup Home Object Manager

Search Setup

College

Details:

- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts

College

New Custom Field

Step 2. Enter the details

Field Label: Total Count

Field Name: Total 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

Setup Home Object Manager

Search Setup

College

Details:

- Fields & Relationships
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- Search Layouts

College

New Custom Field

Step 3. Define the summary calculation

Select Object to Summarize

Master Object: College

Summarized Object: Department

Select Roll-Up Type

☒ COUNT

☐ SUM

☐ MIN

☐ MAX

Field to Aggregate: Name

Filter Criteria

☒ All records should be included in the calculation

☐ Only records meeting certain criteria should be included in the calculation

Previous Next Cancel

Setup Search Setup

Setup Home Object Manager

College

Details

Fields & Relationships

5 Items. Sorted by Field Label

Quick Find

New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
College Name	Name	Text(80)		✓
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Total Count	Total_Count__c	Roll-Up Summary (COUNT Department)		

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Setup Search Setup

Setup Home Object Manager

Lightning Experience App Manager

New Lightning App New Connected App

22 Items • Sorted by App Name • Filtered by All app namespaces - TabSet Type

App Name	Developer Name	Description	Last Modified Date	App T...	Visib...
1 All Tabs	AllTabSet		01/10/2023, 6:39 am	Classic	
2 Analytics Studio	Insights	Build CRM Analytics dashboards and apps	01/10/2023, 6:39 am	Classic	✓
3 App Launcher	AppLauncher	App Launcher tabs	01/10/2023, 6:39 am	Classic	✓
4 Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry	01/10/2023, 6:42 am	Lightning	✓
5 Community	Community	Salesforce CRM Communities	01/10/2023, 6:39 am	Classic	✓
6 Content	Content	Salesforce CRM Content	01/10/2023, 6:39 am	Classic	✓
7 Cosmetic store management	Cosmetic_store		17/10/2023, 11:50 am	Lightning	✓
8 Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes	01/10/2023, 6:39 am	Lightning	✓
9 Digital Experiences	SalesforceCMS	Manage content and media for all of your sites	01/10/2023, 6:39 am	Lightning	✓
10 Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	01/10/2023, 6:39 am	Lightning	✓
11 Marketing	Marketing	Best-in-class on-demand marketing automation	01/10/2023, 6:39 am	Classic	✓
12 Platform	Platform	The fundamental Lightning Platform	01/10/2023, 6:39 am	Classic	
13 Queue Management	QueueManagement	Create and manage queues for your business	01/10/2023, 6:39 am	Lightning	✓
14 Sales	Sales	The world's most popular sales force automation (SFA) solution	01/10/2023, 6:39 am	Classic	
15 Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	01/10/2023, 6:39 am	Lightning	✓

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

<https://namuthalvan-dev-ed.develop.lightning.force.com/one/one.app#/setup/navigationMenu/home>

New Lightning App

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

*App Name ⓘ
Name your app...

*Developer Name ⓘ
Enter a developer name...

Description ⓘ
Enter a description...

App Branding

Image ⓘ
Upload

Primary Color Hex Value ⓘ
#0070D2

Org Theme Options
☐ Use the app's image and color instead of the org's custom theme

App Launcher Preview


ID	Name	Description	Last Modified	Theme	Status	
13	Queue Management	QueueManagement	Create and manage queues for your business.	01/10/2023, 6:39 am	Lightning	✓
14	Sales	Sales	The world's most popular sales force automation (SFA) solution	01/10/2023, 6:39 am	Classic	
15	Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	01/10/2023, 6:39 am	Lightning	✓


New Lightning App


App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.



App Details


* App Name  My_College

* Developer Name  My_College

Description  Enter a description...

App Branding

Image 


Primary Color Hex Value  #0070C2

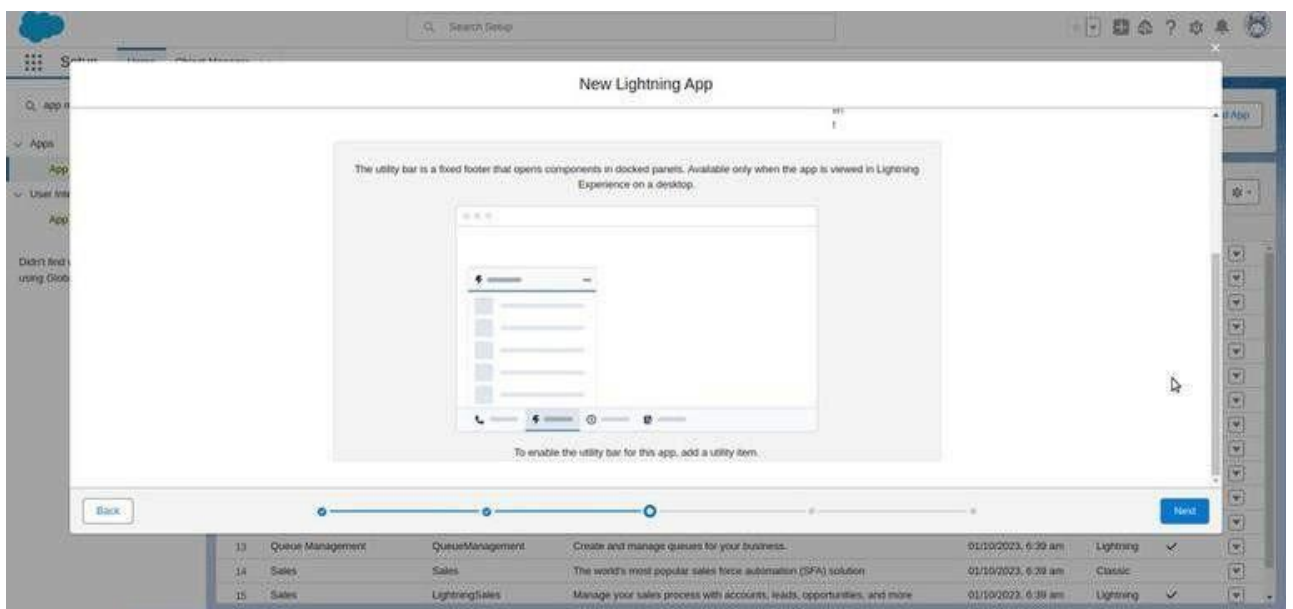
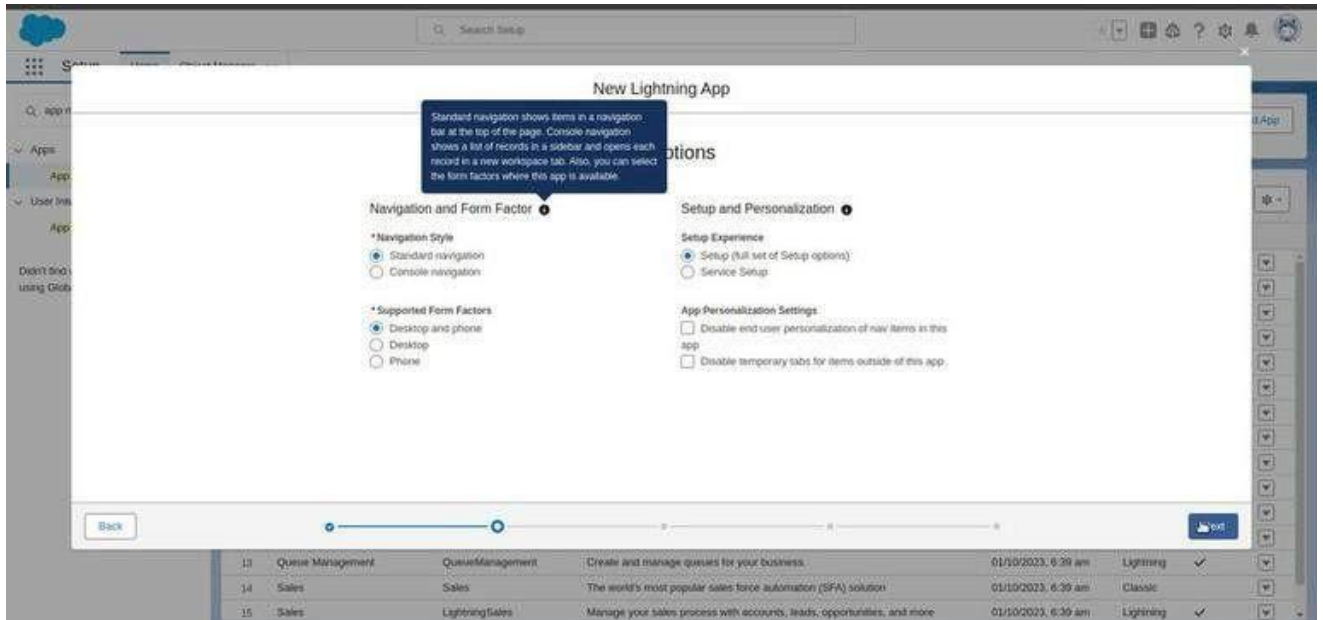
Org Theme Options

☐ Use the app's image and color instead of the org's custom theme

App Launcher Preview

[Next](#)

ID	App Name	Developer Name	Description	Created At	Theme	Status
13	Queue Management	QueueManagement	Create and manage queues for your business.	01/10/2023, 6:39 am	Lightning	✓
14	Sales	Sales	The world's most popular sales force automation (SFA) solution	01/10/2023, 6:39 am	Classic	
15	Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	01/10/2023, 6:39 am	Lightning	✓



The screenshot displays the 'New Lightning App' configuration window in Salesforce. The interface is clean and modern, with a light grey background. The left sidebar contains a navigation menu with options like 'Salesforce', 'Salesforce Branding', and 'Salesforce Navigation'. The main content area is titled 'New Lightning App' and contains two primary sections: 'App Details' and 'App Branding'. The 'App Details' section includes input fields for 'App Name' (filled with 'My_App'), 'Developer Name' (filled with 'My_App'), and a 'Description' field (empty). The 'App Branding' section includes an 'Image' field (showing a blue square with a white 'M') and a 'Primary Color Hex Value' field (filled with '#0070C2'). Below these sections is an 'App Launcher Preview' showing a blue button with 'My' and a grey button with 'My_App'. At the bottom right of the main content area is a blue 'Next' button. The bottom of the screen shows a list of existing apps, including 'Queue Management', 'Sales', and 'Lightning Sales', each with a description, date, and theme.

colleges

Recently Viewed

0 items • Updated a few seconds ago

New

Import

Change Owner

college Name

New college

* = Required information

Information

* college Name

AYS Engineering college

Owner

SATHISH KUMAR S

Cancel

Save & New

Save

Service

HomeChatterAccountsContactsCasesReportsDashboardscollegesdepartmentsDetailsProvidersConsumersManagements

college

AVS Engineering college

New ContactEditNew Opportunity

RelatedDetails

college Name

AVS Engineering college

Total count

0

Created By

SATHISH KUMAR S. 28/10/2023, 6:37 pm

Owner

SATHISH KUMAR S

Last Modified By

SATHISH KUMAR S. 28/10/2023, 6:37 pm

departments

Recently Viewed

0 items • Updated a few seconds ago

department Name

New department

* = Required Information

Information

* department Name

CSE


* college

AVS Engineering college

Cancel

Save & New

Save



Service

HomeChatterAccountsContactsCasesReportsDashboardscollegesdepartmentsDetailsProvidersConsumersManagements

Search...

college

AVS Engineering college

New ContactEditNew Opportunity

RelatedDetails

college Name

AVS Engineering college

Total count

1

Created By

SATHISH KUMAR S, 28/10/2023, 6:37 pm

Owner

SATHISH KUMAR S

Last Modified By

SATHISH KUMAR S, 28/10/2023, 6:37 pm

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 the Security for the users.

Setup > OBJECT MANAGER
Details

Fields & Relationships
4 items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Details Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User Group)		✓

Quick Find: [] New Deleted Fields Field Dependencies Set History Tracking

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

Setup > OBJECT MANAGER
Details

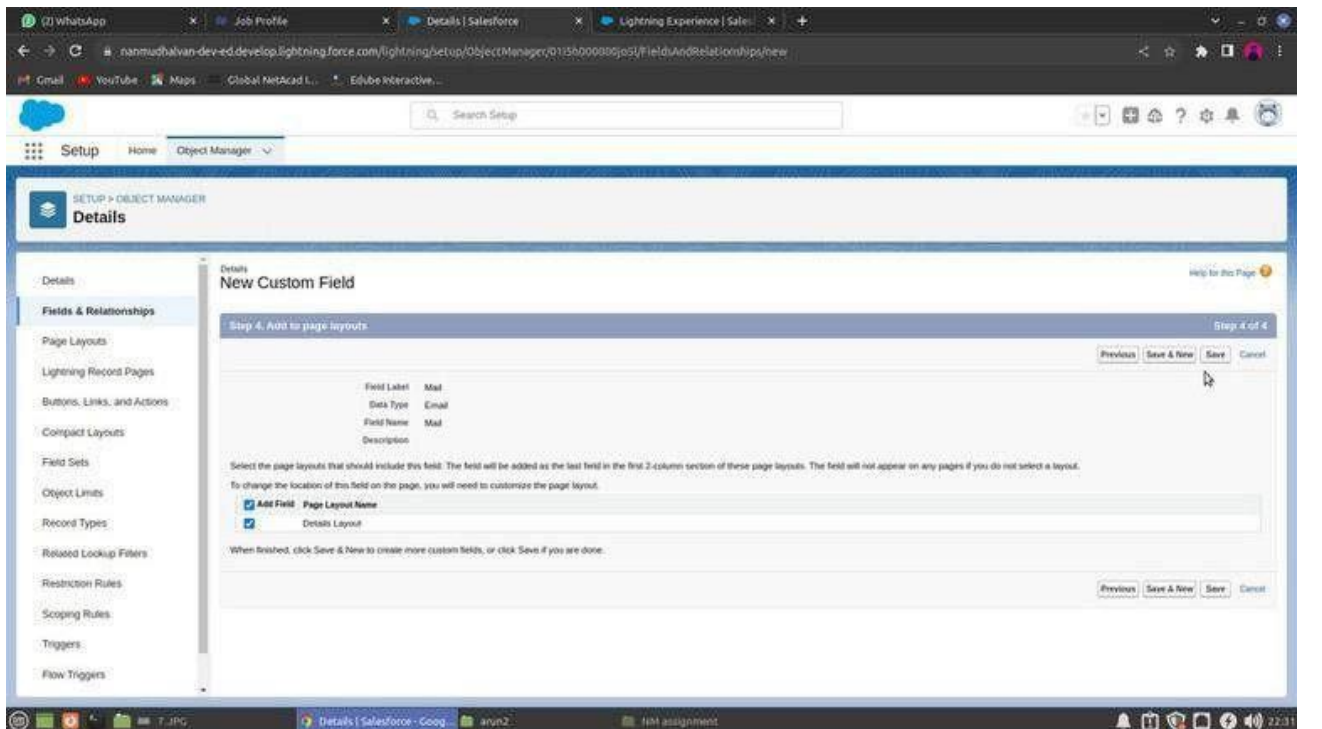
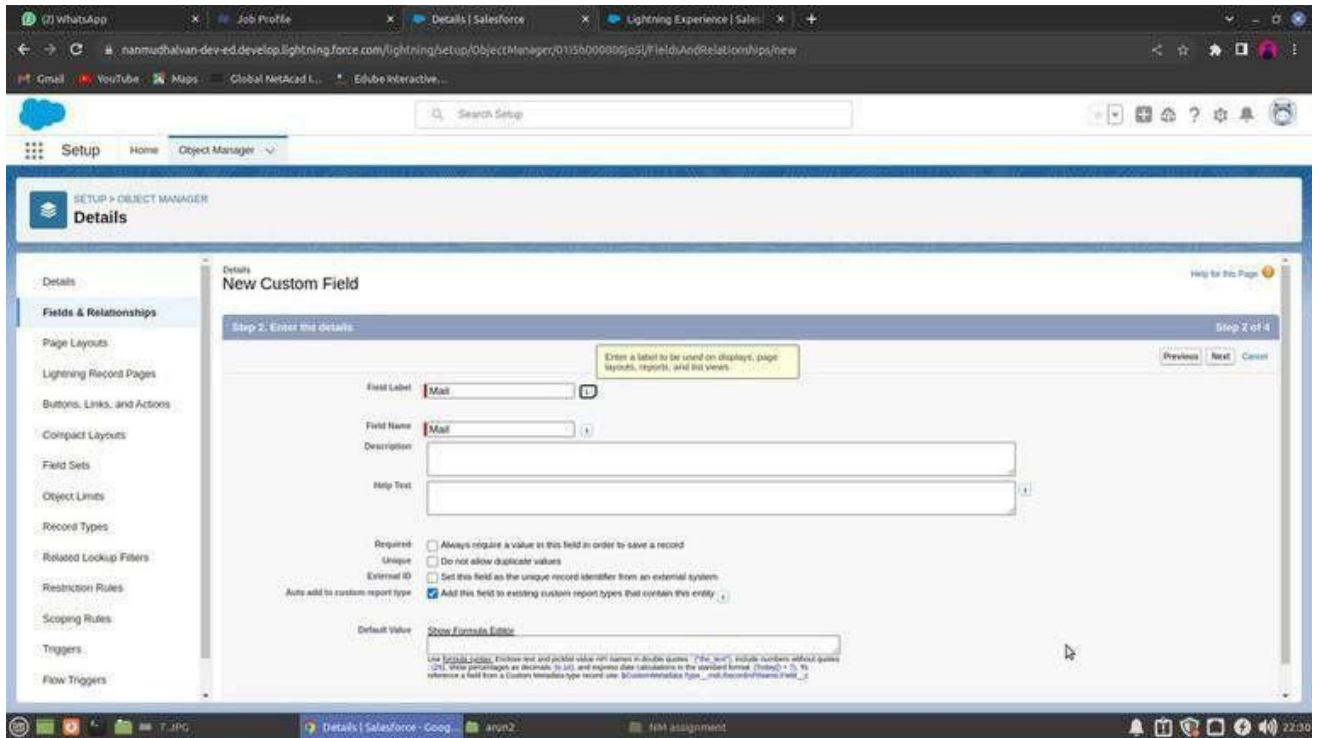
Fields & Relationships

Relationships

- ☐ 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.

Field Types

- ☐ 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.
- ☐ DateTime
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 DateTime field.
- ☒ Email
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 from that custom email addresses cannot be used for mass emails.
- ☐ Geolocation
Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
- ☐ Number
Allows users to enter any number. Leading zeros are removed.
- ☐ Percent
Allows users to enter a percentage number, for example, "10" and automatically adds the percent sign to the number.
- ☐ Phone
Allows users to enter any phone number. Automatically formats it as a phone number.
- ☐ Picklist
Allows users to select a value from a list you define.
- ☐ Picklist (Multi-Select)
Allows users to select multiple values from a list you define.
- ☐ Text
Allows users to enter any combination of letters and numbers.



Setup > OBJECT MANAGER

Details

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

Currency

Date

Date/Time

Email

Geolocation

Number

Percent

Phone

Picklist

Picklist (Multi-Select)

Text

Text Area

Text Area (Long)

Text Area (Rich)

Text (Encrypted)

Time

URL

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.

Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.

Allows users to enter any number. Leading zeros are removed.

Allows users to enter a percentage number, for example, "10" and automatically adds the percent sign to the number.

Allows users to enter any phone number. Automatically formats it as a phone number.

Allows users to select a value from a list you define.

Allows users to select multiple values from a list you define.

Allows users to enter any combination of letters and numbers.

Allows users to enter up to 255 characters on separate lines.

Allows users to enter up to 31,072 characters on separate lines.

Allows users to enter formatted text, add images and links. Up to 31,072 characters on separate lines.

Allows users to enter any combination of letters and numbers and store them in encrypted form.

Allows users to enter a local time. For example, "2:40 PM", "14:40", and "14:40:00" are all valid times for this field.

Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

Next Cancel

Setup > OBJECT MANAGER

Details

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

New Custom Field

Step 2 of 4

Step 2: Enter the details

Field Label: Phone

Field Name: Phone

Description:

Help Text:

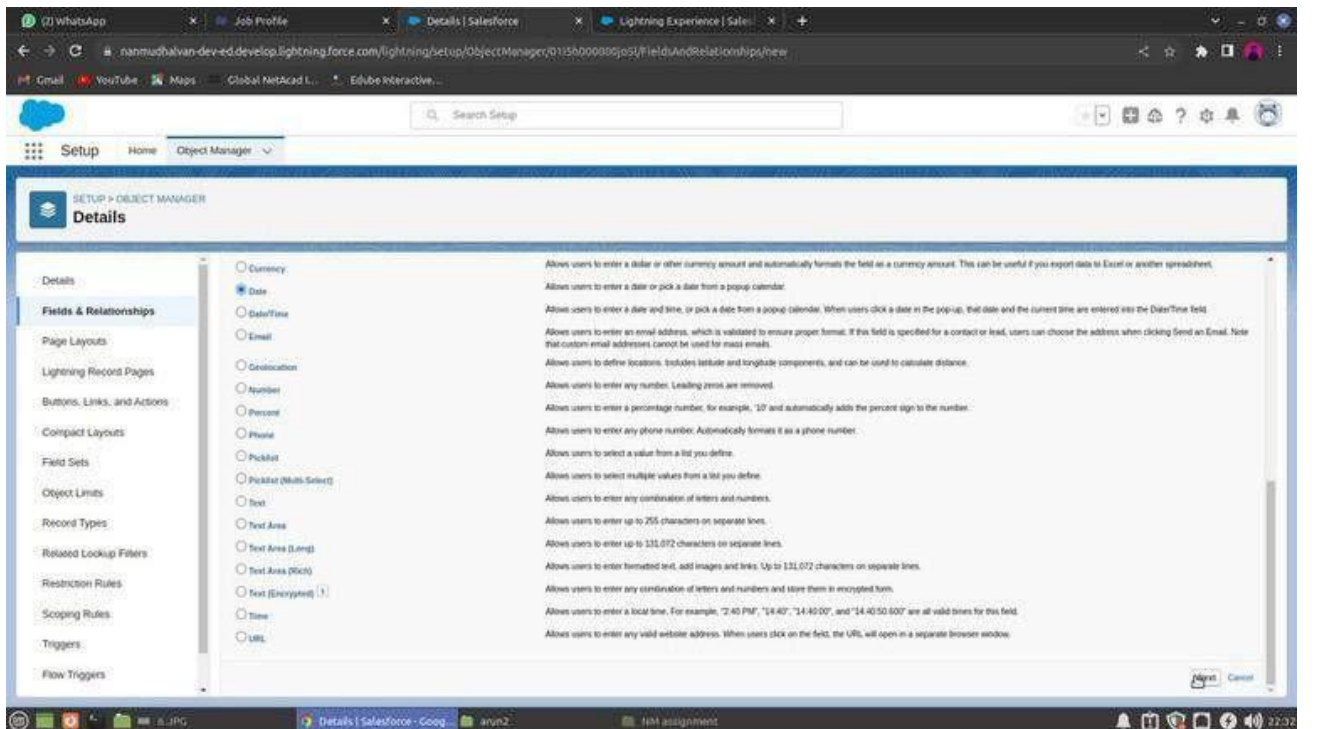
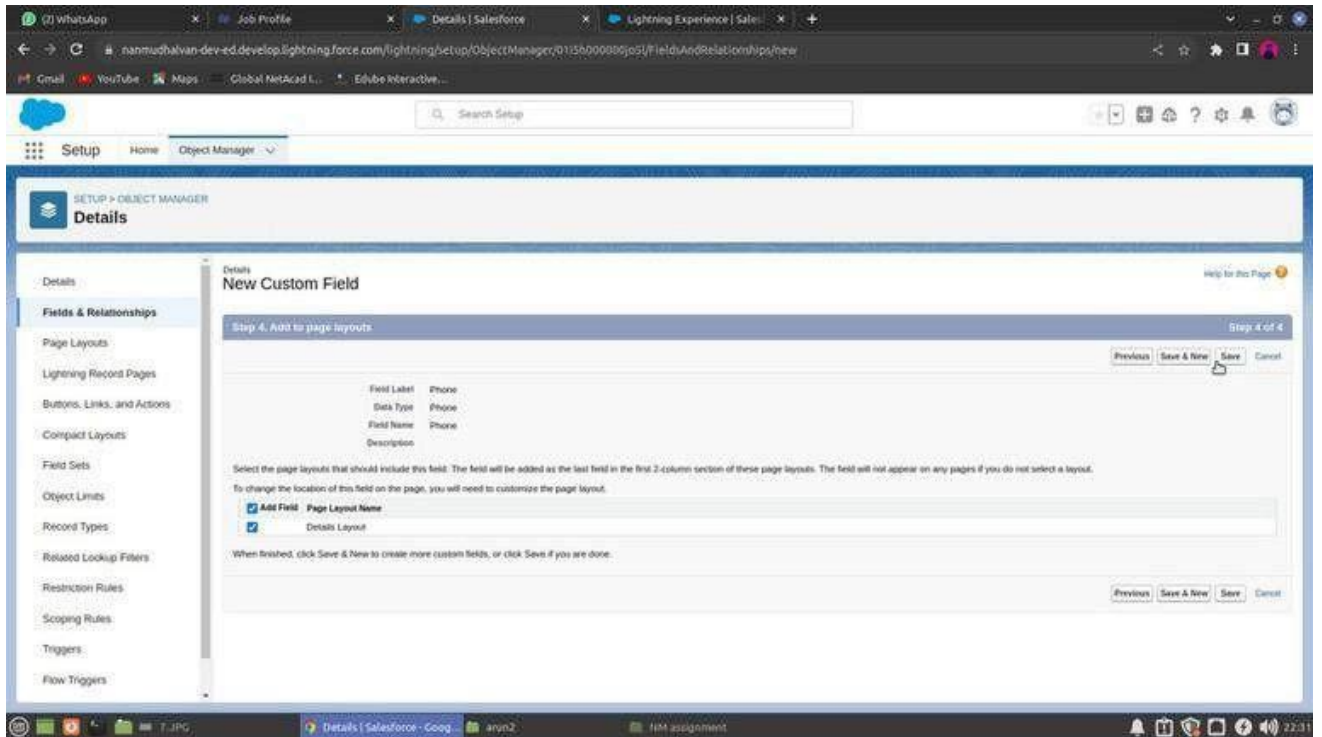
Required: ☐ Always require a value in this field in order to save a record

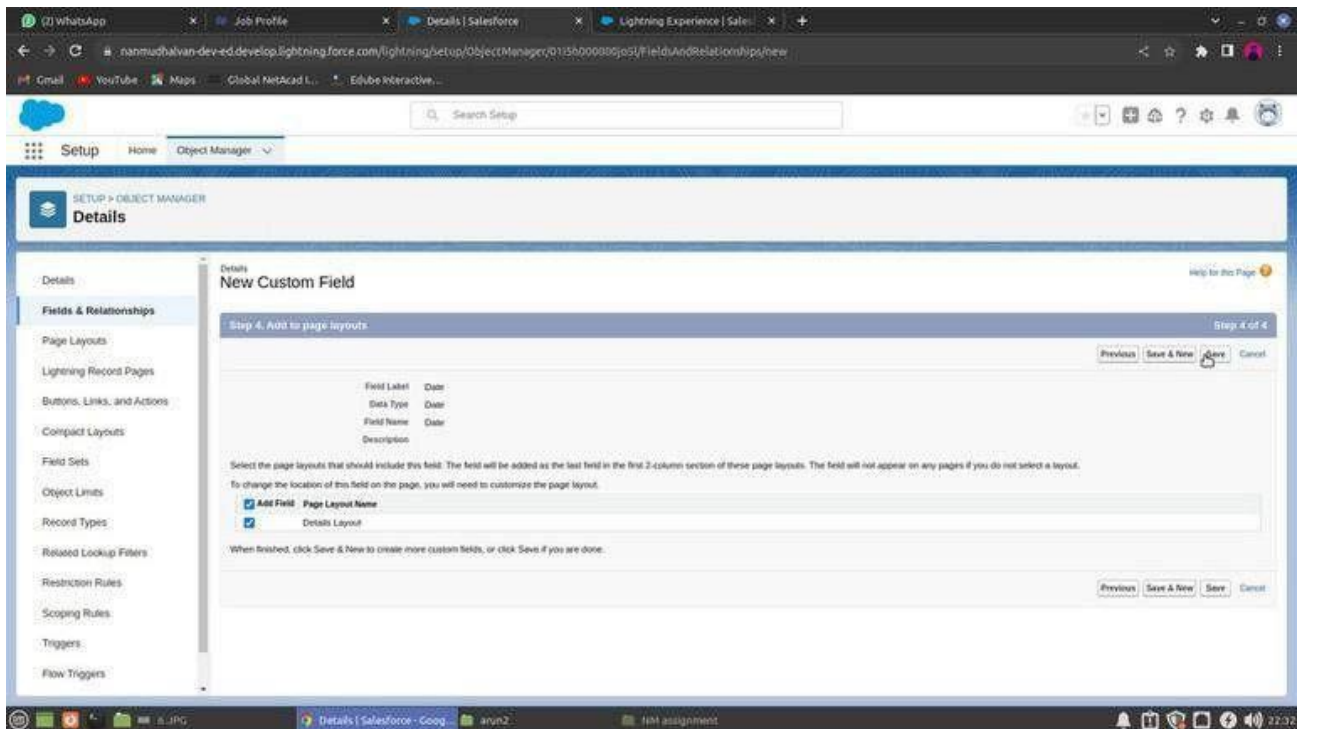
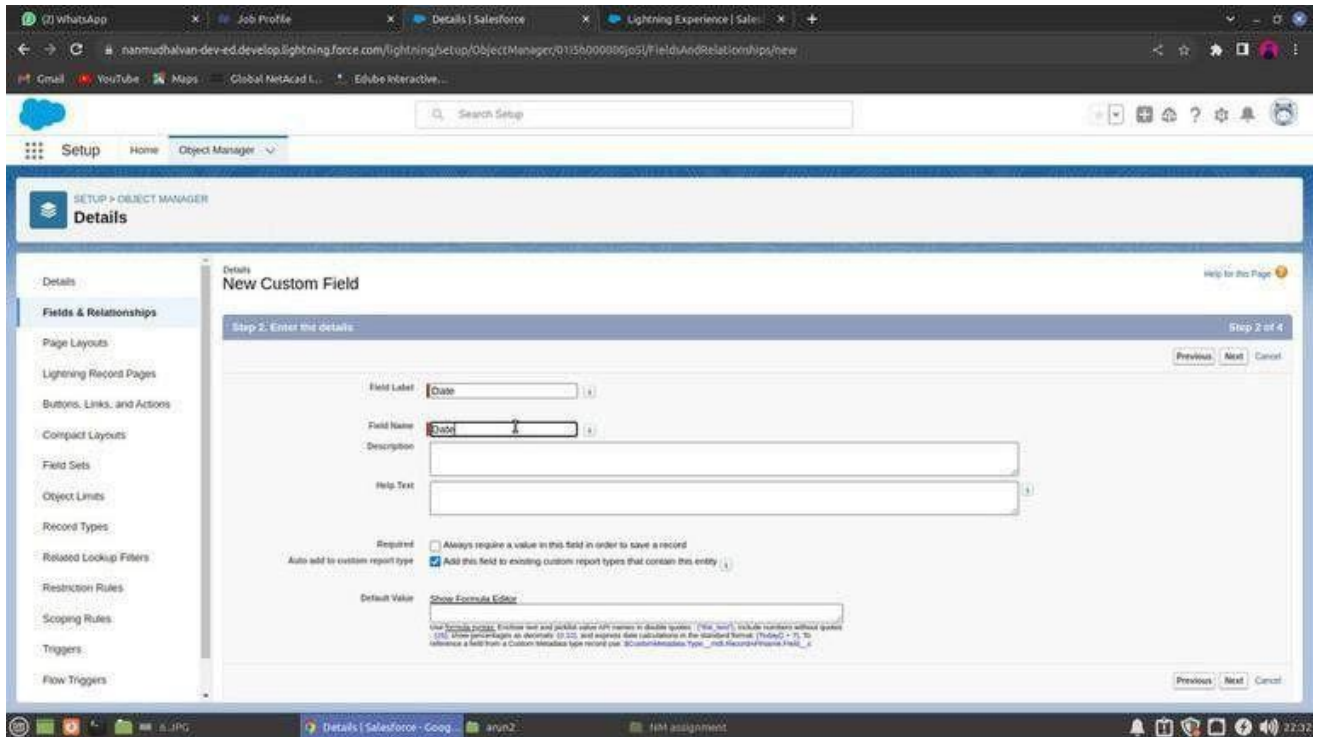
Auto add to custom report type: ☒ Add this field to existing custom report types that contain this entity

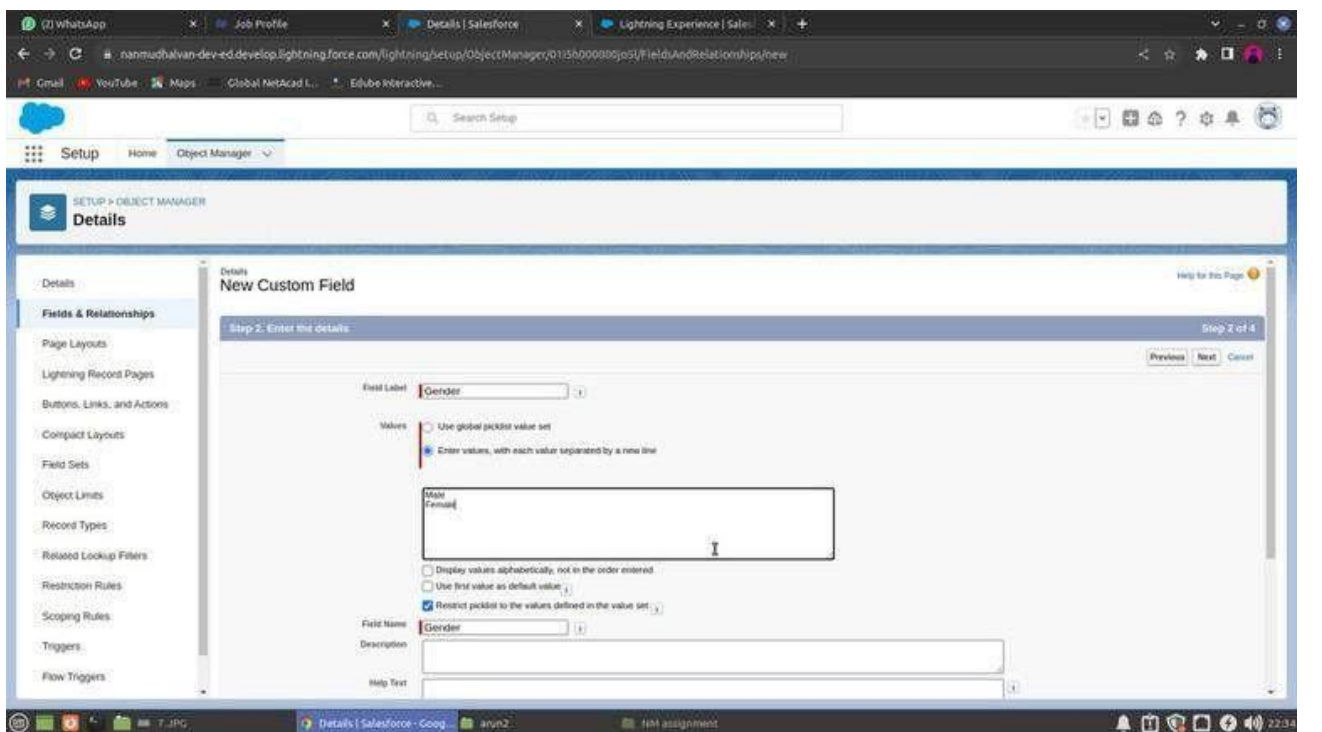
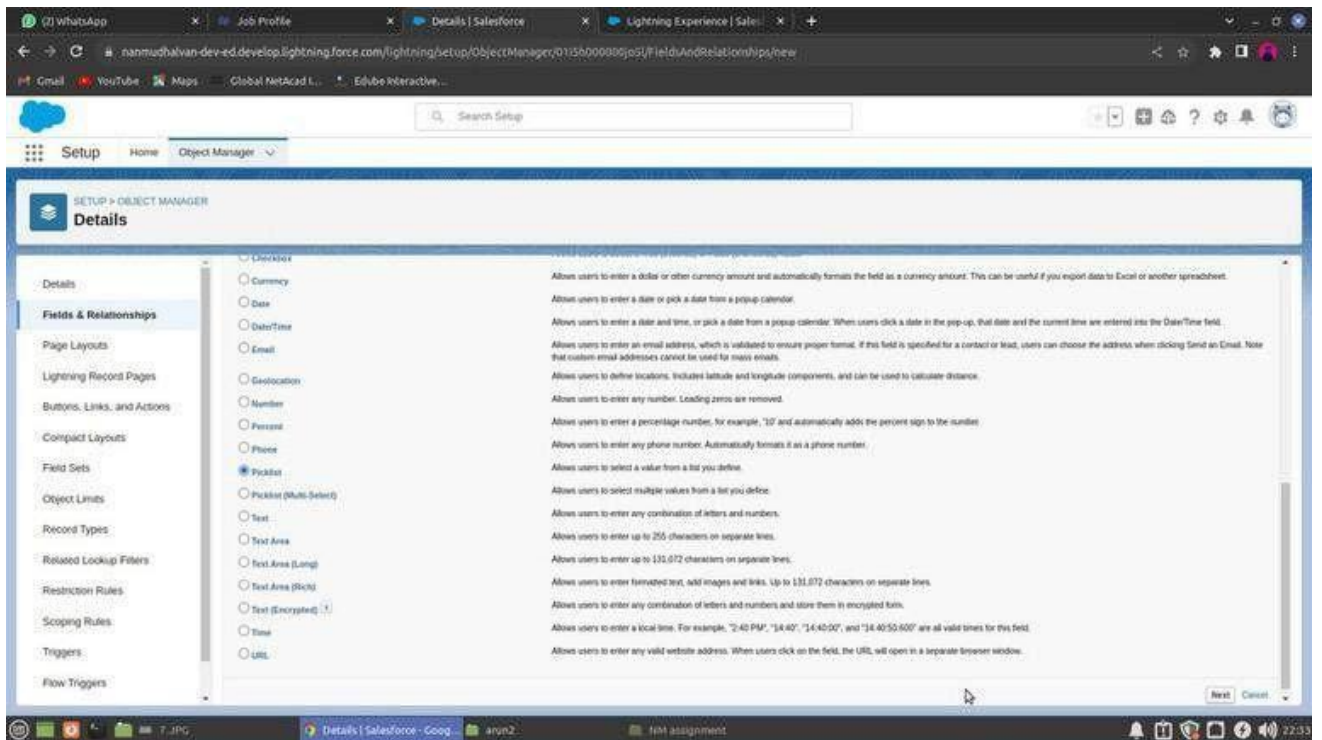
Default Value: [Show Formula Editor](#)

Use formulas to create, combine, and picklist values. Picklist values are double quoted ("Pick List"). Values contain no spaces. (1) Use curly braces as delimiters. (2) Use the standard date calculation in the standard format. (3) Use the standard time calculation in the standard format. (4) To reference a field from a Custom Database type record, use \$CustomDatabaseType__rmb.RecordId__c.

Previous Next Cancel







Setup > OBJECT MANAGER

Details

Details

New Custom Field

Step 4. Add to page layouts Step 4 of 4

Previous Save & New **New** Cancel

Field Label	Gender
Data Type	Picklist
Field Name	Gender
Description	

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

☒ Add Field ☐ Page Layout Name

☒ Details Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Previous Save & New **Save** Cancel

Setup > OBJECT MANAGER

Details

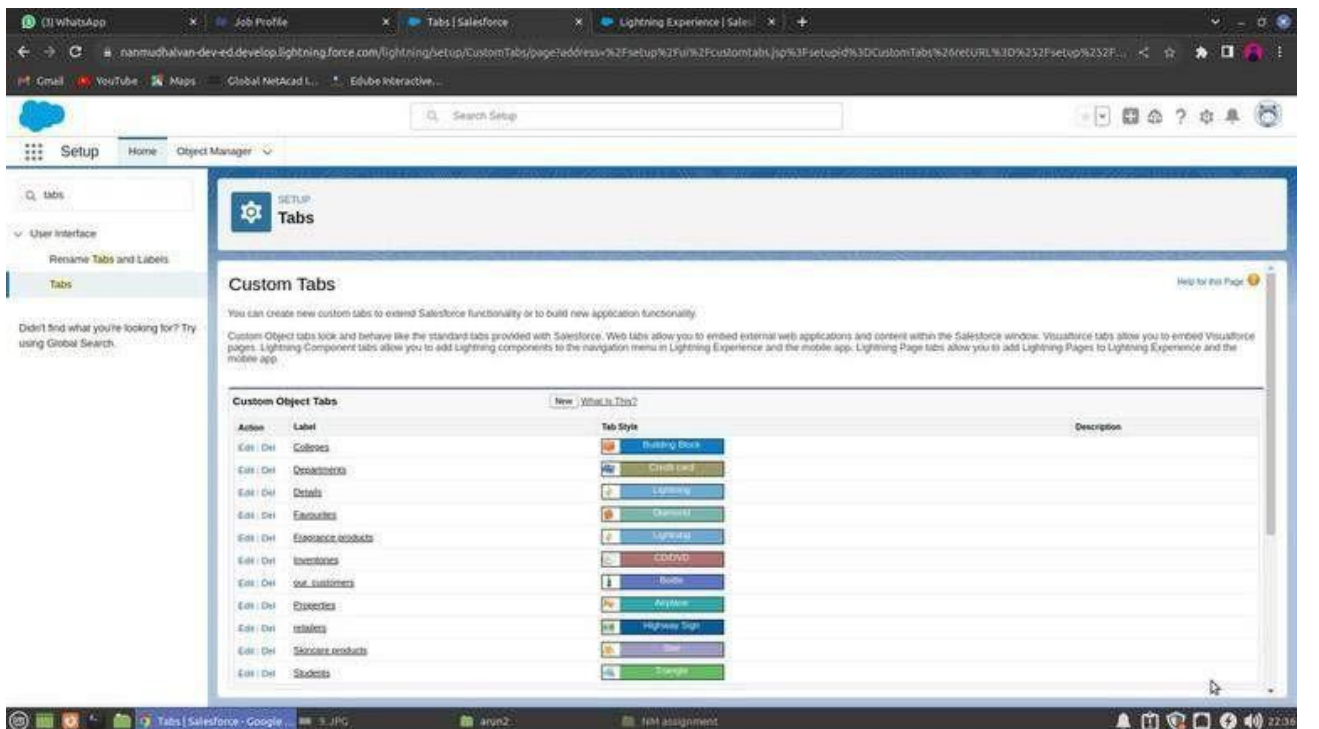
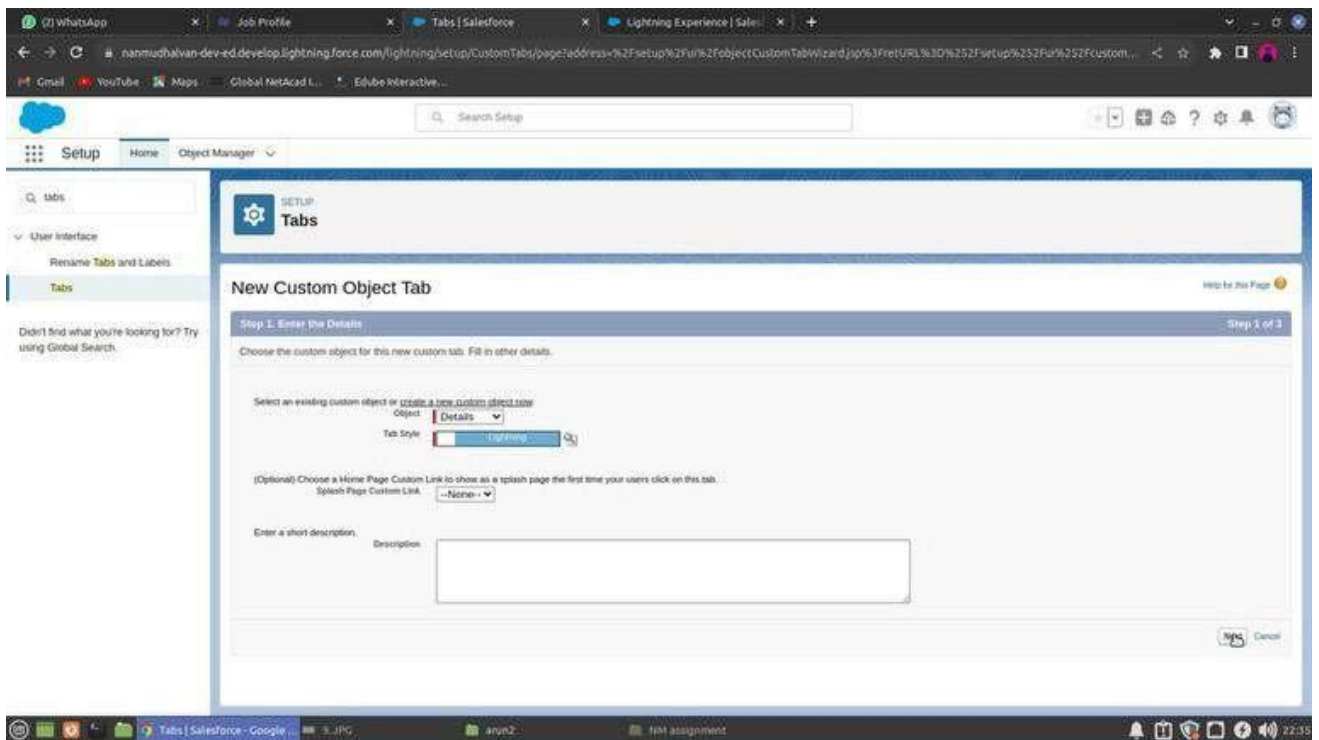
Details

Fields & Relationships

8 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Date	Date__c	Date		
Details Name	Name	Text(80)		✓
Gender	Gender__c	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Mail	Mail__c	Email		
Owner	OwnerId	Lookup(User/Group)		✓
Phone	Phone__c	Phone		



Setup

Search Setup

Flow Trigger Explorer New Flow

Flow Definitions

All Flows

35 items • Sorted by Flow Label • Filtered by All flow definitions • Updated a few seconds ago

Flow Label	Process Type	Active	Temp...	Package State	Pack...	Last Modif...	Last Modified Date
Basic Approval Request	Flow Orchestration for CMS	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Book Appointment from Invitation	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Cancel Item Flow	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Change Case Owner to Incident Owner	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Close Change Request & Related Issues	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
CMS: Check Whether Any Step is Completed	Evaluation Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
CMS: Notify Content Author	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
CMS: Review Content	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
CMS: Submit Content for Review	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
CMS: Withdraw Review Request	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Consultant Inc	Screen Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Unmanaged		Apna Akram	17/10/2023, 1:11 pm
Create a Case	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Create Order Summary Flow	Autolaunched Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Create Process Exception Flow	Autolaunched Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			

Flow Builder

Free-Form

New Flow

Core All + Templates

Screen Flow
Guides users through a business process that's launched from Lightning pages, Experience Cloud sites, quick actions, and more.

Schedule-Triggered Flow
Launches at a specified time and frequency for each record in a batch. This autolaunched flow runs in the background.

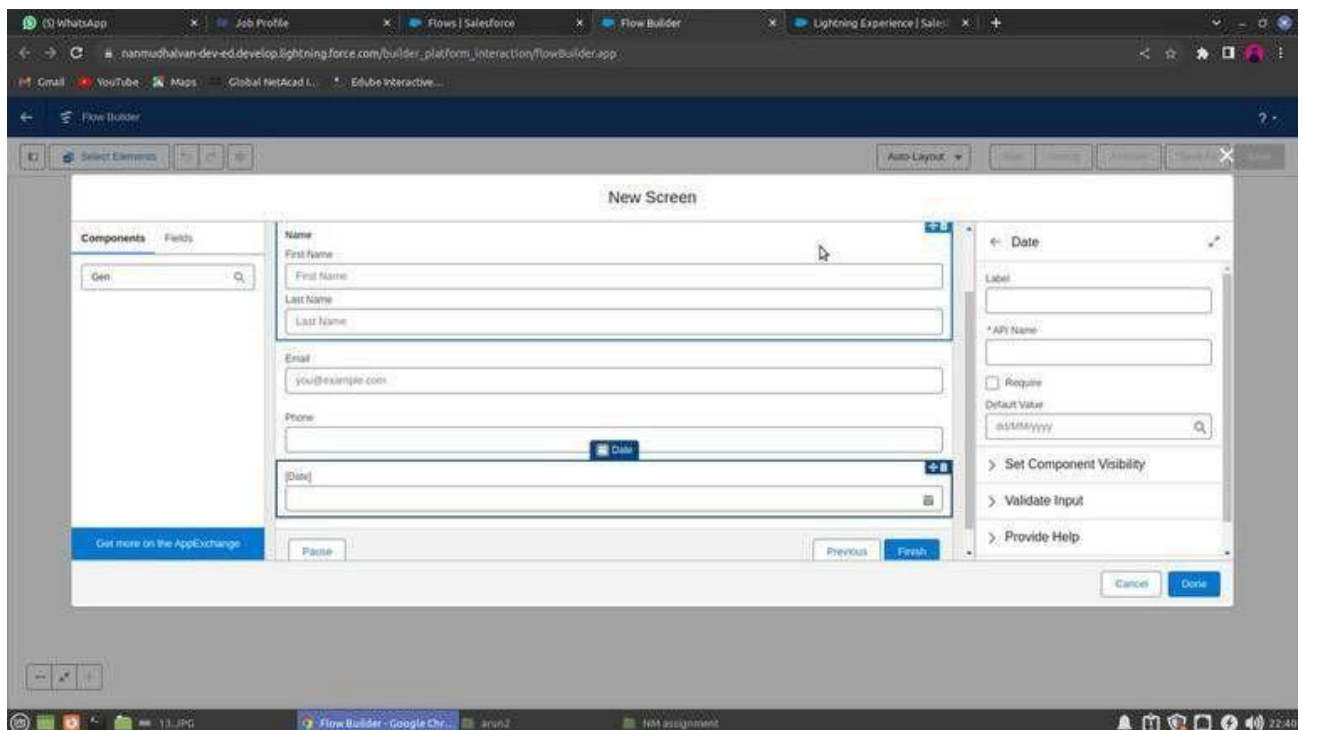
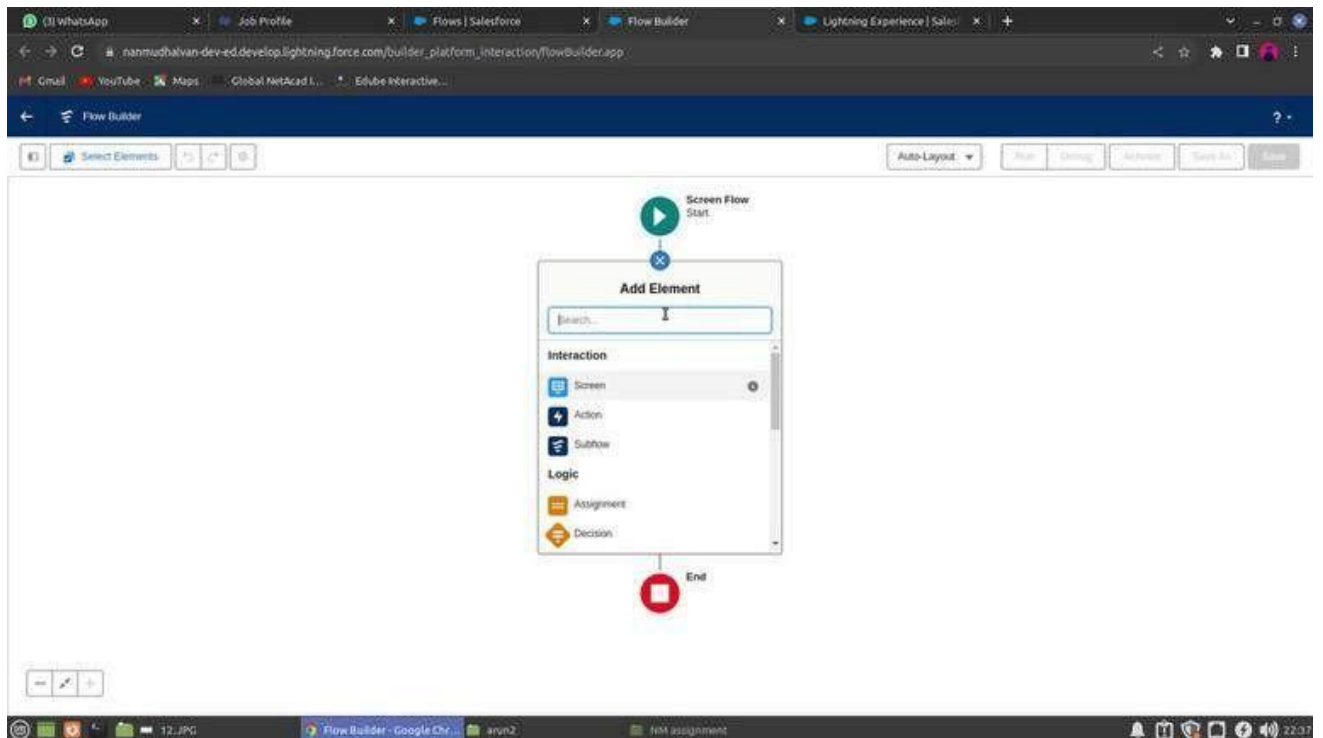
Autolaunched Flow (No Trigger)
Launches when invoked by Apex, processes, REST API, and more. This autolaunched flow runs in the background.

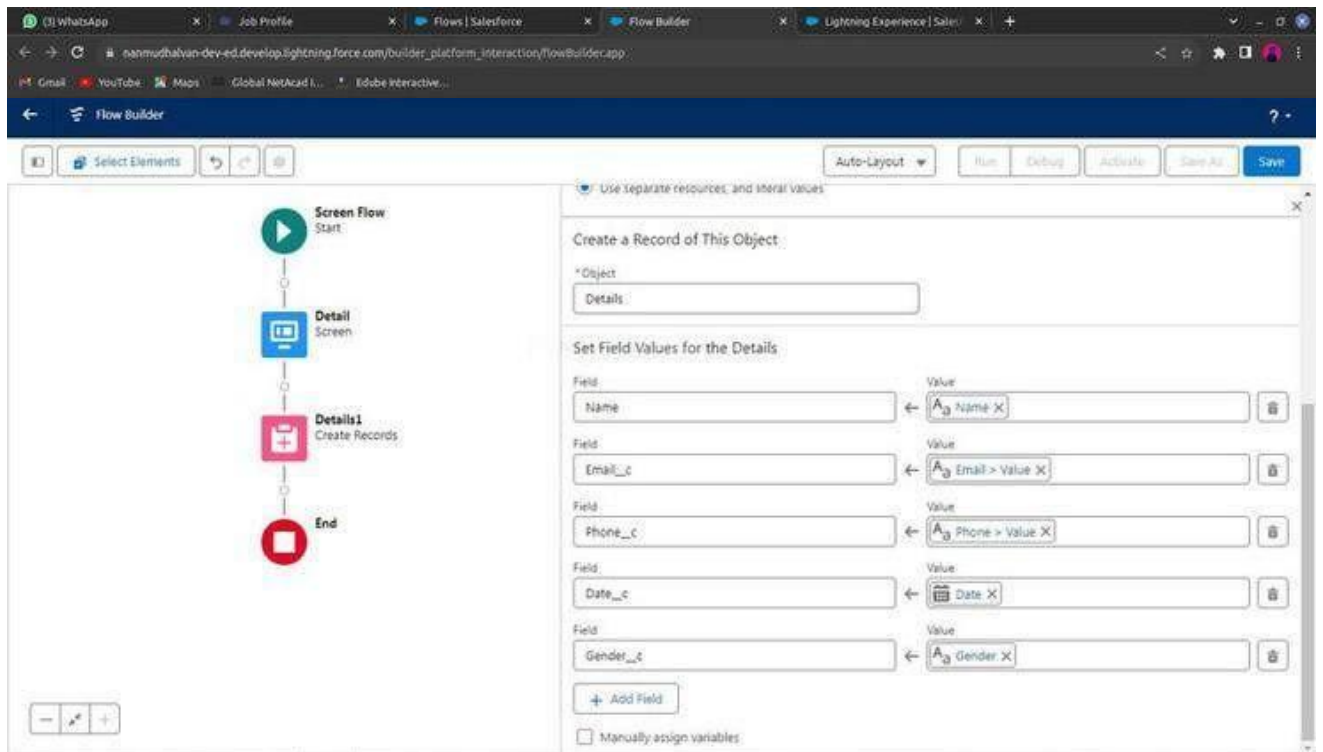
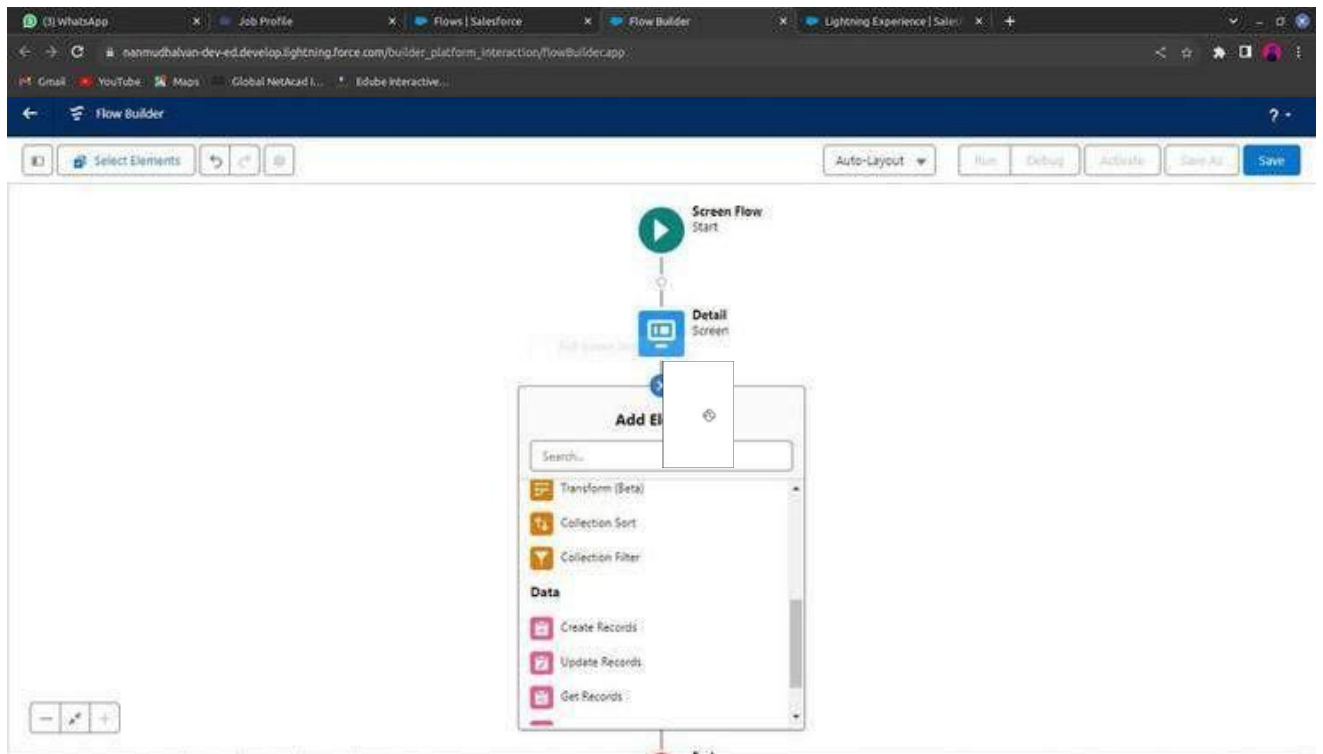
Record-Triggered Flow
Launches when a record is created, updated, or deleted. This autolaunched flow runs in the background.

Platform Event—Triggered Flow
Launches when a platform event message is received. This autolaunched flow runs in the background.

Record-Triggered Orchestration
Launches when a record is created or updated. An orchestration lets you create a multi-step, multi-user process.

Create





details

Name

sathishkumar

Email

sathishk2003@gmail.com

Phone

6369914154


Date


22-Sept-2002


Gender


male


Next




















Service

Home

Chatter

Accounts

Contacts

Cases

Reports

Dashboards

colleges


departments

Details

Providers

Consumers

Managements



Details

sathishkumar

New Contact

Edit

New Opportunity

Related

Details

Name

sathishkumar

Edit

Email

sathishk2003@gmail.com

Edit

Phone

6369914154

Edit

Date

22/09/2002


Edit

Gender

Male


Edit

Owner


 SATHISH KUMAR S

Edit

Created By

 SATHISH KUMAR S · 28/10/2023, 6:50 pm

Last Modified By

 SATHISH KUMAR S · 28/10/2023, 6:50 pm

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.

WhatsApp | Job Profile | New Custom Object | Sales | Lightning Experience | Sales |

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

Setup | Home | Object Manager

SETUP New Custom Object

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Get an expert](#) [Don't show this message again](#)

Custom Object Definition Edit

Save Save & New Cancel

Custom Object 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

Content Name

Enter Record Name Label and Format

The Record Name appears in your lists, lists, lists, related lists, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

WhatsApp | Job Profile | Tabs | Salesforce | Lightning Experience | Sales |

nanmudhalvan-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page/address+%2Fsetup%2Fui%2FobjectCustomTabWizard.jsp%3FretURL%3D%252Fsetup%252Fui%252Fcustom...

Setup | Home | Object Manager

SETUP Tabs

New Custom Object Tab

Step 1 of 3: Enter the Details Step 1 of 3

Choose the custom object for this new custom tab. Fill in other details.

Select an existing custom object or [create a new custom object now](#)

Object Management

Tab Style Content

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

Splash Page Custom Link None

Enter a short description.

Description

Next Cancel

Setup | Home | Object Manager

Search Setup

Setup

tabs

User Interface

Rename Tabs and Labels

tabs

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

SETUP Tabs

Important: Lightning Experience will soon give users the ability to change the navigation layout in Lightning Experience. Learn more about Lightning Experience's new navigation layout.

Custom Object Tabs

New | What is This?

Action	Label	Tab Style	Description
Edit Del	Collores	Bulking Block	
Edit Del	Departments	Credit card	
Edit Del	Details	Lightning	
Edit Del	Expenses	Standard	
Edit Del	Expense reports	Lightning	
Edit Del	Inventories	CCDVD	
Edit Del	Managements	Camera	
Edit Del	our customers	Route	
Edit Del	Procedures	Aspire	
Edit Del	relatives	Highway sign	
Edit Del	Skincare products	Real	
Edit Del	Students	Stranger	

Web Tabs

New | What is This?

No Web Tabs have been defined.

My-app | Recently Viewed | College | Department | Details | Management

Search...

New | Import | Change Owner

0 items • Updated a few seconds ago

Management Name

Full Screen Tool

You haven't viewed any Management recently. Try switching list views.

Setup Home Object Manager

Search Setup

Hyperforce Assistant

Users

Profiles

Data

Mass Transfer Approval Requests

Feature Settings

Data.com

Prospector Preferences

Prospector Users

Functions

Marketing

Lead Processes

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Products

Asset Settings

SETUP Profiles

Profiles

All Profiles Edit Delete Create New View

New Profile

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit Clone	Salesforce API Only System Integrations	Salesforce Integration	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Silver Partner User	Silver Partner	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Solution Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Standard Platform User	Salesforce Platform	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Standard User	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	System Administrator	Salesforce	<input type="checkbox"/>

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Page 1 of 1

Setup Home Object Manager

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SETUP Profiles

Profile Edit Manager

Set the permissions and page layouts for this profile.

Profile Edit Save Save & New Cancel

Name Manager

User License Salesforce Platform

Description

Custom Profile ☒

Custom App Settings

Required Information

	Visible	Default		Visible	Default
Analytics Studio (standard__Insights)	<input type="checkbox"/>	<input type="radio"/>	Platform (standard__Platform)	<input checked="" type="checkbox"/>	<input type="radio"/>
App Launcher (standard__AppLauncher)	<input type="checkbox"/>	<input type="radio"/>	WDC (standard__Work)	<input type="checkbox"/>	<input type="radio"/>
My app (Myapp)	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>			

Service Provider Access

Setup

Search Setup

Profiles

Contact Point Consents

Contact Point Emails

Streaming Channels

User External Credentials

Custom Object Permissions

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
College	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Department	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: --None--

Password Policies

User passwords expire in: 90 days

Enforce password history: 3 passwords remembered

Minimum password length: 8

Setup

Search Setup

Profiles

Profile Manager

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Loon IP Ranges | Enabled Apex Class Access | Enabled Visualforce Page Access | Enabled External Data Source Access | Enabled External Credential Access | Enabled External Credential Provider Access | Enabled Custom Metadata Type Access | Enabled Custom Setting Definition Access | Enabled Flow Access | Enabled Service Presence Status Access | Enabled Custom Permissions

Profile Detail

Name: Manager

User License: Salesforce Platform

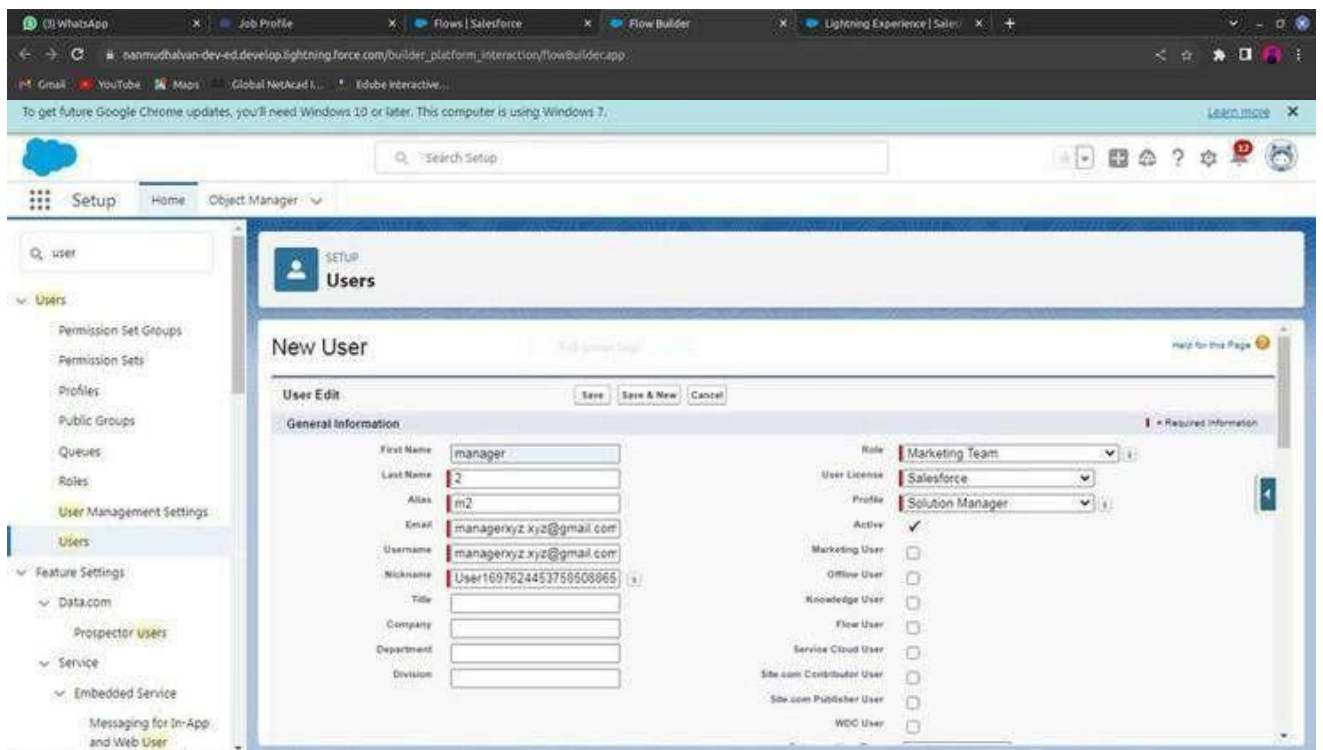
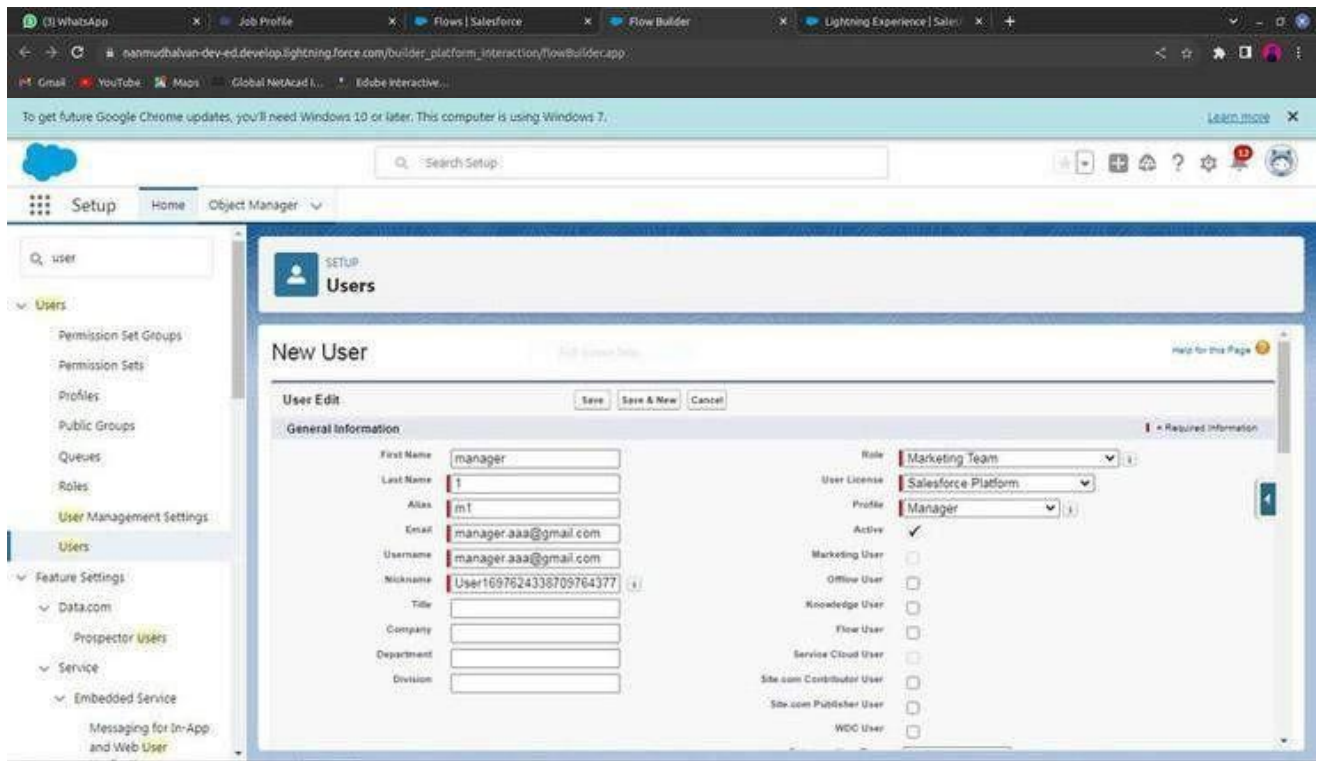
Description:

Created By: Admin | 10/10/2023, 3:47 pm

Modified By: Admin | 10/10/2023, 3:45 pm

Page Layouts

Standard Object Layouts	Object Milestone	Operating Hours	Order
Global: Global Layout (View Assignment)	Object Milestone Layout (View Assignment)	Operating Hours Layout (View Assignment)	Order Layout
Email Application: Not Assigned (View Assignment)			
Home Page Layout: Home Page Default			



nanmudhalvan-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.capp

To get future Google Chrome updates, you'll need Windows 10 or later. This computer is using Windows 7. [Learn more](#)

Search Setup

Setup Home Object Manager

per

Hyperforce Assistant

Lightning Experience Transition Assistant

Users

Permission Set Groups

Permission Sets

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Digital Experiences

Settings

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Accounts

Person Accounts

Salesforce Scheduler

Assignment Policies

Salesforce Scheduler

SETUP Permission Sets

On this page you can create, view, and manage permission sets.

All Permission Sets Edit Delete Create New View

Action	Permission Set Label	Description	License
<input type="checkbox"/> Clone	Buyer	Allows access to the store. Lets users see products and c...	B2B Buyer Permission Set One Seat
<input type="checkbox"/> Clone	Buyer Manager	Includes all Buyer capabilities, and allows access to mana...	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/> Clone	C360 High Scale Flow Integration User	Allows integration user to access features specific to C360...	Cloud Integration User
<input type="checkbox"/> Clone	C360 User	Denotes that the user is a Sales Cloud or Service Cloud u...	CRM User
<input type="checkbox"/> Clone	Commerce Admin	Allow access to commerce admin features.	Commerce Admin Permission Set License Seats
<input type="checkbox"/> Clone	Contact Center Admin	Manage Service Cloud Voice contact centers that use Am...	Service Cloud Voice User
<input type="checkbox"/> Clone	Contact Center Agent	Access agent features in Service Cloud Voice contact cent...	Service Cloud Voice User
<input type="checkbox"/> Clone	Contact Center Supervisor	Access supervisor features in Service Cloud Voice contact...	Service Cloud Voice User
<input type="checkbox"/> Del Clone	Experience Profile Manager		Salesforce
<input type="checkbox"/> Clone	Facility Manager	Lets users create, read, edit, and delete locations, subloa...	Facility Manager

1-25 of 30 0 Selected 4 Previous Next Page 1 of 2

nanmudhalvan-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.capp

To get future Google Chrome updates, you'll need Windows 10 or later. This computer is using Windows 7. [Learn more](#)

Search Setup

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Salesforce Scheduler

SETUP Permission Sets

manager12

Find Settings Clone Delete Edit Properties Manage Assignments View Summary (Beta)

Permission Set Overview

Field	Value
Description	
License	
Session Activation Required	<input type="checkbox"/>
Permission Set Groups Added To	0
API Name	manager12
Namespace Prefix	
Created By	adm_1 10/10/2023, 3:52 pm
Last Modified By	adm_1 10/10/2023, 3:52 pm

Apps

Assigned Area
Settings that specify which apps are visible in the app menu

Assigned Connected Apps
Settings that specify which connected apps are visible in the app menu

Object Settings
Permissions to access objects and fields, and settings such as tab availability

App Permissions
Permissions to perform app-specific actions, such as "Manage Call Centers"

Apex Class Access

Browser tabs: (3) WhatsApp, Job Profile, Flows | Salesforce, Flow Builder, Lightning Experience | Sales...

Address bar: nanmudbalyan-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.app

Page Title: Setup

Search Setup

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Permission Sets

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Accounts

Person Accounts

Salesforce Scheduler

Assignment Policies

Salesforce Scheduler

Permission Sets

Permission Set: **manager12**

Find Settings... Clone Delete Edit Properties Manage Assignments View Summary (Beta)

Permission Set Overview Object Settings Accounts

Accounts Save Cancel

Object Permissions

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

Field Permissions

Field Name	Field API Name	<input type="checkbox"/> Read Access	<input type="checkbox"/> Edit Access
Account Name	Name	<input type="checkbox"/>	<input type="checkbox"/>

Setup Home Object Manager

Search: user

Users

Permission Set Groups

Permission Sets

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Queues

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User Management Settings

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Feature Settings

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Prospector Users

Service

Embedded Service

Messaging for In-App and Web User Verification

User Interface

Action Link Templates

All Users

1 item selected

Search this list...

	Full Name ↑	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Chatter Expert	Chatter	chatty00d5j00000ciqpaeav.ktx1n04y2af@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	Consumer 5	c5	cons5@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Consumer
<input type="checkbox"/>	Integration User	integ	integration@00d5j00000ciqpaeav.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input checked="" type="checkbox"/>	Manager 1	m1	sathish11@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Manager
<input type="checkbox"/>	Manager 2	m2	manager221@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Solution Manager
<input type="checkbox"/>	Provider 1	p1	sathiskumar100@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Provider
<input type="checkbox"/>	SATHISH KUMAR S	SS	sathishkumar103@gmail.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Security User	sec	insightssecurity@00d5j00000ciqpaeav.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

Cancel Next

Setup Home Object Manager

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Select an Expiration Option For Assigned Users

☒ No expiration date

☐ Specify the expiration date

1 Day 1 Week 30 Days 60 Days Custom Date

Time Zone

Select a time zone...

Selected Users

Full Name	Role	Profile	Active	User License	Expires On
manager 1	Marketing Team	Manager	✓	Salesforce Platform	Never Expires

Cancel Back Assign

Setup Home Object Manager

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Person Accounts

Salesforce Scheduler

Assignment Policies

Salesforce Scheduler

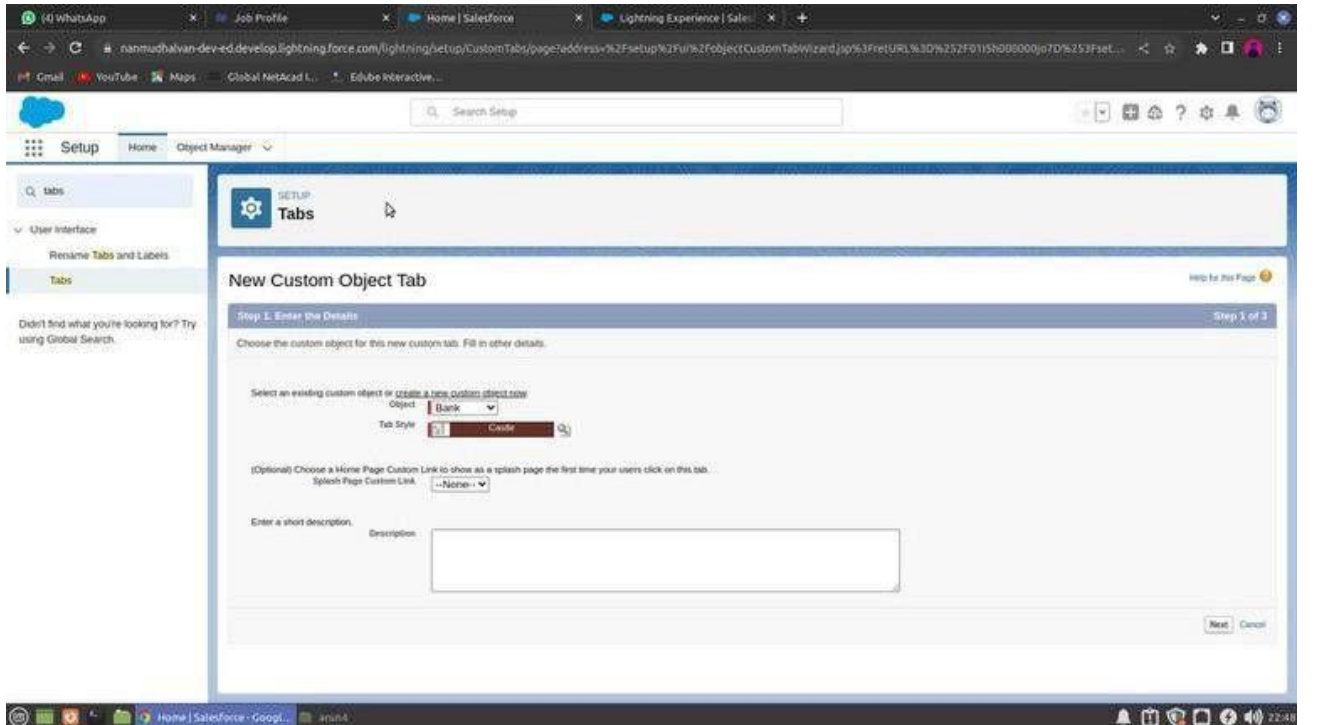
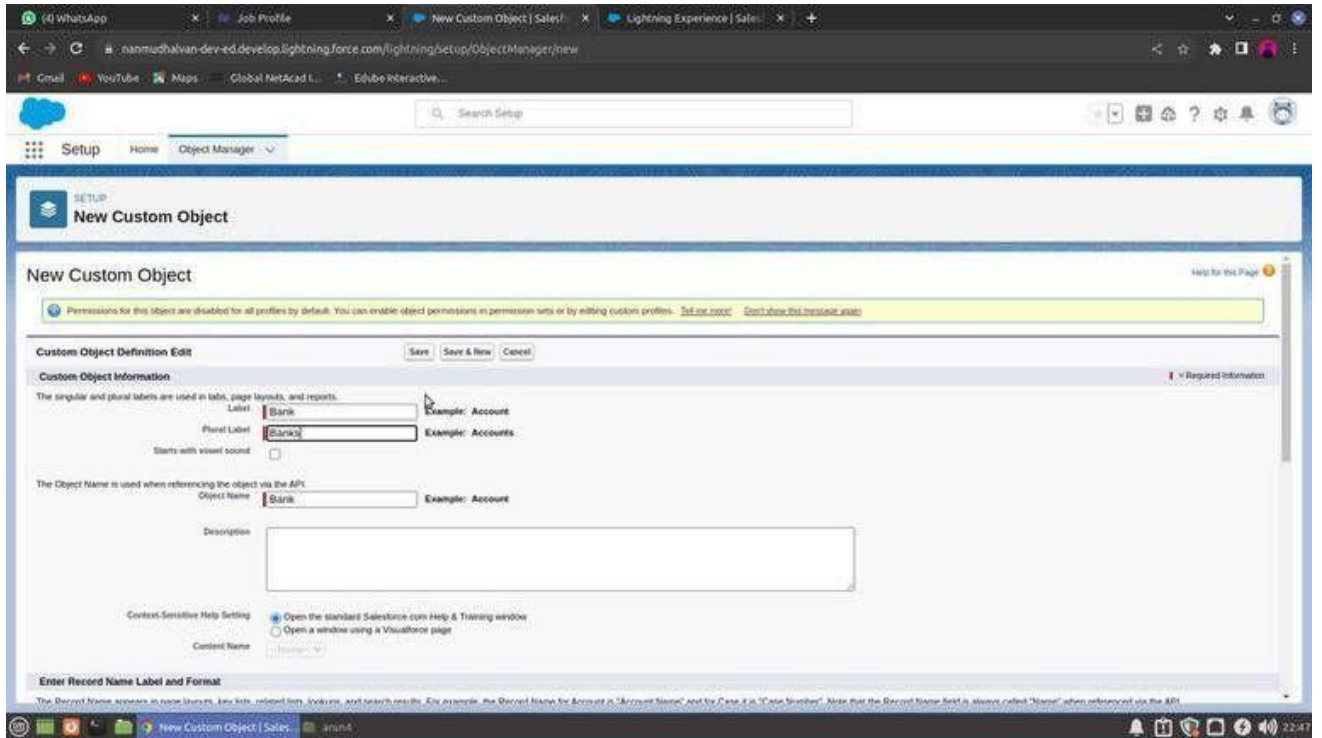
manager12

Current Assignments

Add Assignment

Full Name	Active	Role	Profile	User License	Expires On
manager 1	✓	Marketing Team	Manager	Salesforce Platform	

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



Browser tabs: (4) WhatsApp, Job Profile, Bank | Salesforce, Lightning Experience | Sales |

Address bar: nanmudhalvan-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0150000000007D/Details/view

Setup > Object Manager

Bank

Details

Fields & Relationships

Description

API Name
Bank_c

Custom
☒

Singular Label
Bank

Plural Label
Banks

Enable Reports

Track Activities

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

Edit **Delete**

https://nanmudhalvan-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0150000000007D/Details/view

Browser tabs: (4) WhatsApp, Job Profile, New Custom Object | Sales |, Lightning Experience | Sales |

Address bar: nanmudhalvan-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new

Setup > Object Manager

New Custom Object

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Set up more](#) [Get help with this message](#)

Custom Object Definition Edit **Save** **Save & New** **Cancel**

Custom Object 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

Content Name

Enter Record Name Label and Format

The Record Name appears in most sources, including related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Browser tabs: WhatsApp, Job Profile, Flows | Salesforce, Flow Builder, Lightning Experience | Sales.

Address bar: naamudhalvan-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.app

Page Title: SETUP - OBJECT MANAGER Customer

Left Navigation Menu:

- 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

Main Content Area: Add Custom Field

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

Next Cancel

Browser tabs: WhatsApp, Job Profile, Flows | Salesforce, Flow Builder, Lightning Experience | Sales.

Address bar: naamudhalvan-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.app

Page Title: SETUP - OBJECT MANAGER Customer

Left Navigation Menu:

- 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

Main Content Area: New Relationship

Step 6: Add custom related lists

Field Label: Bank
Data Type: Master-Detail
Field Name: Bank
Description:

Specify the title that the related list will have in all of the layouts associated with the parent:
Related List Label: Customer

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

- ☒ Bank Layout

Append related list to users' existing personal customizations

Previous Save & New Save Cancel

Browser tabs: WhatsApp, Job Profile, Flows | Salesforce, Flow Builder, Lightning Experience | Sales.

Address bar: naamudhayan-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.app

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SETUP Profiles

Profile: Standard Platform User

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Learn IP Ranges](#) | [Enabled New Cases Access](#) | [Enabled View/Write Page Access](#) | [Enabled External Data Source Access](#) | [Enabled Named Credential Access](#) | [Enabled Schema Explorer Preview Access](#) | [Enabled Custom Metadata Type Access](#) | [Enabled Custom Setting Definition Access](#) | [Enabled Flow Access](#) | [Enabled Service Presence Status Access](#) | [Enabled Custom Permissions](#)

Profile Detail [Edit](#) [Clone](#) [View Users](#)

Name	User License	Custom Profile
Standard Platform User	Salesforce Platform	<input type="checkbox"/>

Created By: salesforce.com, inc. 17/10/2023, 10:41 am Modified By: Admin 16/10/2023, 3:34 pm

Page Layouts

Standard Object Layouts	Global	Object Milestone	Operating Hours	Order
Email Application	Global Layout View Assignment	Object Milestone Layout View Assignment	Operating Hours Layout View Assignment	Order Layout View Assignment
Home Page Layout	Not Assigned View Assignment			

Browser tabs: WhatsApp, Job Profile, Flows | Salesforce, Flow Builder, Lightning Experience | Sales.

Address bar: naamudhayan-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.app

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SETUP Profiles

Clone Profile

Enter the name of the new profile.

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

Existing Profile	Standard Platform User
User License	Salesforce Platform
Profile Name	<input type="text" value="Management"/>

[Save](#) [Cancel](#)

Browser tabs: (3) WhatsApp, Job Profile, Flows | Salesforce, Flow Builder, Lightning Experience | Sales.

Address bar: naamudhalvan-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.app

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SETUP Profiles

Profile Edit: Management

Set the permissions and page layouts for this profile.

Profile Edit: Save Save & New Cancel

Name: Management

User License: Salesforce Platform

Description:

Custom Profile: ☒

Custom App Settings

	Visible	Default
Analytics Studio (standard__Insights)	<input type="checkbox"/>	<input type="radio"/>
App Launcher (standard__AppLauncher)	<input type="checkbox"/>	<input type="radio"/>
My app (Myapp)	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>
Platform (standard__Platform)	<input checked="" type="checkbox"/>	<input type="radio"/>
WDC (standard__Work)	<input type="checkbox"/>	<input type="radio"/>

Service Provider Access

Browser tabs: (3) WhatsApp, Job Profile, Flows | Salesforce, Flow Builder, Lightning Experience | Sales.

Address bar: naamudhalvan-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.app

Search Setup

Setup Home Object Manager

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SETUP Profiles

Contact Point Consents: ☒ ☒ ☒ ☒ ☐

Contact Point Emails: ☒ ☒ ☒ ☒ ☐

Streaming Channels: ☒ ☒ ☒ ☒ ☐

User External Credentials: ☐ ☐ ☐ ☐ ☐

Custom Object Permissions

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Bank	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
College	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Department	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Details	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: --None--

Password Policies

User passwords expire in: 90 days

Enforce password history: 3 passwords remembered

Setup

Search Setup

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

SETUP Users

New User

User Edit

General Information

First Name: manager

Last Name: bank

Alias: mbank

Email: managerbank@gmail.com

Username: managerbank@gmail.com

Nickname: User1697625040398307733

Title:

Company:

Department:

Division:

Role: <None Specified>

User License: Partner App Subscription

Profile: Partner App Subscription User

Active: ☒

Marketing User: ☐

Offline User: ☐

Knowledge User: ☐

Flow User: ☐

Service Cloud User: ☐

Site.com Contributor User: ☐

Site.com Publisher User: ☐

WDC User: ☐

Setup

Search Setup

prof

Profiles

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

SETUP Profiles

Profile Edit

Sales Manager

Set the permissions and page layouts for this profile.

Profile Edit

Name: Sales Manager

User License: Salesforce Platform

Description:

Custom Profile: ☒

Custom App Settings

	Visible	Default		Visible	Default
Analytics Studio (standard__Insights)	<input type="checkbox"/>	<input type="radio"/>	Platform (standard__Platform)	<input checked="" type="checkbox"/>	<input type="radio"/>
App Launcher (standard__AppLauncher)	<input type="checkbox"/>	<input type="radio"/>	WDC (standard__Work)	<input type="checkbox"/>	<input type="radio"/>
My-app (Myapp)	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>			

Service Provider Access

Browser tabs: (3) WhatsApp, Job Profile, Flows | Salesforce, Flow Builder, Lightning Experience | Sales.

Address bar: naamudhalvan-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.app

Navigation: Setup, Home, Object Manager

Search: Search Setup

Left sidebar: prof, Users, Profiles

Profiles

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

Profiles

Feature	1	2	3	4	5	6
Contact Point Addresses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Consents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Emails	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Custom Object Permissions

Object	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Bank	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
College	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Feature	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Department	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Details	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: --None--

Password Policies

User passwords expire in: 90 days

Browser tabs: (3) WhatsApp, Job Profile, Flows | Salesforce, Flow Builder, Lightning Experience | Sales.

Address bar: naamudhalvan-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.app

Navigation: Setup, Home, Object Manager

Search: Search Setup

Left sidebar: prof, Users, Profiles

Profiles

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

Users

New User

Help for this Page

User Edit

Save Save & New Cancel

General Information

First Name: manager

Last Name: sales

Alias: msale

Email: managersales.123@gmail.co

Username: managersales.123@gmail.co

Nickname: User1697625227951209885

Title:

Company:

Department:

Division:

Role and License

Role: <None Specified>

User License: Partner App Subscription

Profile: Partner App Subscription User

Active: ☒

Marketing User: ☐

Offline User: ☐

Knowledge User: ☐

Flow User: ☐

Service Cloud User: ☐

Site.com Contributor User: ☐

Site.com Publisher User: ☐

WDC User: ☐

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To get future Google Chrome updates, you'll need Windows 10 or later. This computer is using Windows 7.

Setup Home Object Manager

per

Hyperforce Assistant

Lightning Experience Transition Assistant

Users

Permission Set Groups

Permission Sets

Feature Settings

Digital Experiences

Settings

Functions

Sales

Accounts

Person Accounts

Salesforce Scheduler

Assignment Policies

Salesforce Scheduler

SETUP

Permission Sets

On this page you can create, view, and manage permission sets.

All Permission Sets Edit Delete Create New View

Action	Permission Set Label	Description	License
<input type="checkbox"/>	Buider	Allows access to the store. Lets users see products and...	B2B Buyer Permission Set One Seat
<input type="checkbox"/>	Buyer Manager	Includes all Buyer capabilities, and allows access to ma...	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/>	Cloud High Scale Flow Integration User	Allows integration user to access features specific to C3...	Cloud Integration User
<input type="checkbox"/>	CRM User	Denotes that the user is a Sales Cloud or Service Cloud u...	CRM User
<input type="checkbox"/>	Commerce Admin	Allow access to commerce admin features.	Commerce Admin Permission Set License Seats
<input type="checkbox"/>	Contact Center Admin	Manage Service Cloud Voice contact centers that use Am...	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Agent	Access agent features in Service Cloud Voice contact cent...	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Supervisor	Access supervisor features in Service Cloud Voice contact...	Service Cloud Voice User
<input type="checkbox"/>	Experience Profile Manager		Salesforce
<input type="checkbox"/>	Facility Manager	Lets users create, read, edit, and delete locations, subloc...	Facility Manager

1-25 of 31 0 Selected 4 Previous Next Page 1 of 2

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Setup Home Object Manager

per

Hyperforce Assistant

Lightning Experience Transition Assistant

Users

Permission Set Groups

Permission Sets

Feature Settings

Digital Experiences

Settings

Functions

Sales

Accounts

Person Accounts

Salesforce Scheduler

Assignment Policies

Salesforce Scheduler

SETUP

Permission Sets

Find Settings Clone Delete Edit Properties Manage Assignments View Summary (Beta)

Permission Set Overview

Description

License

Session Activation Required

Permission Set Groups Added To

API Name

Namespace Prefix

Created By

Last Modified By

managerbanksales

Created By

Last Modified By

Apps

Assigned Apps

Settings that specify which apps are visible in the app menu

Assigned Connected Apps

Settings that specify which connected apps are visible in the app menu

Object Settings

Permissions to access objects and fields, and settings such as tab availability

App Permissions

Permissions to perform app-specific actions, such as "Manage Call Centers"

Apex Class Access

Browser tabs: WhatsApp, Job Profile, Flows | Salesforce, Flow Builder, Lightning Experience | Sales...

Address bar: nanmudhalvan-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.app

Notification: To get future Google Chrome updates, you'll need Windows 10 or later. This computer is using Windows 7.

Search Setup

Setup Home Object Manager

Search: per

Hyperforce Assistant
Lightning Experience Transition Assistant

Users

- Permission Set Groups
- Permission Sets**
- Feature Settings
 - Digital Experiences
 - Settings
 - Functions
 - Sales
 - Accounts**
 - Person Accounts
 - Salesforce Scheduler
 - Assignment Policies
 - Salesforce Scheduler

Setup

Permission Sets

Permission Set: managerbanksales

Find Settings Clone Delete Edit Properties Manage Assignments View Summary (Beta)

Permission Set Overview Object Settings Accounts

Accounts Save Cancel

Object Permissions

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

Field Permissions

Field Name	Field API Name	Read Access	Edit Access
Account Name	Name	<input type="checkbox"/>	<input type="checkbox"/>

Search Setup

Setup Home Object Manager

Search: 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

All Users

1 item selected

Search this list...

	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Chatter Expert	Chatter	chatty.00d5j00000ciqpaev.ktx1n04y2af@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	Consumer 5	c5	cons5@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Consumer
<input type="checkbox"/>	Integration User	integ	integration@00d5j00000ciqpaev.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input checked="" type="checkbox"/>	Manager 1	m1	sathish11@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Manager
<input type="checkbox"/>	Manager 2	m2	manager221@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Solution Manager
<input type="checkbox"/>	Provider 1	p1	sathiskumars100@gamil.com	Marketing Team	<input checked="" type="checkbox"/>	Provider
<input type="checkbox"/>	SATHISH KUMAR S	SS	sathishkumar103@gmail.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Security User	sec	insightssecurity@00d5j00000ciqpaev.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

Cancel Next

Browser tabs: (1) WhatsApp, Job Profile, Flows | Salesforce, Flow Builder, Lightning Experience | Sales | +

Address bar: nanudbalvan-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.app

Navigation bar: My-app, Recently Viewed, Collage, Department, Details, Management, Customers, Bank

Section: Customers Recently Viewed

0 items • Updated a few seconds ago

Search: Search this list...

Buttons: New, Settings, Refresh, Edit, Delete, Filter

Total Life Time Value	Name
Full view link	

You haven't viewed any Customers recently.
Try switching list views.