

# **Naan Mudhalvan Salesforce Developer (Course) Assignment**

Name: Mohammad ashik M

Naan Mudhalvan id: 644357A7BED23AB81AF4ED04AE898D33

Year and Dept: 4<sup>th</sup> 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

New Custom Object

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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

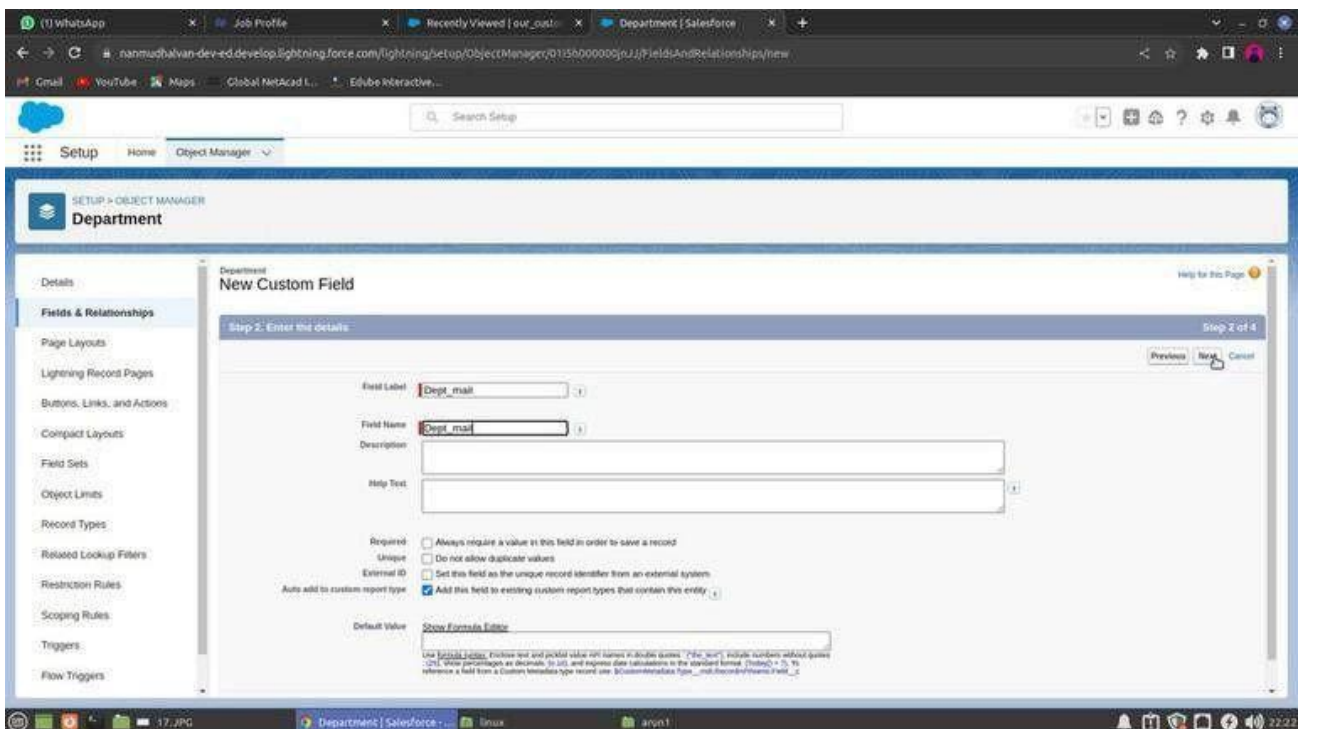
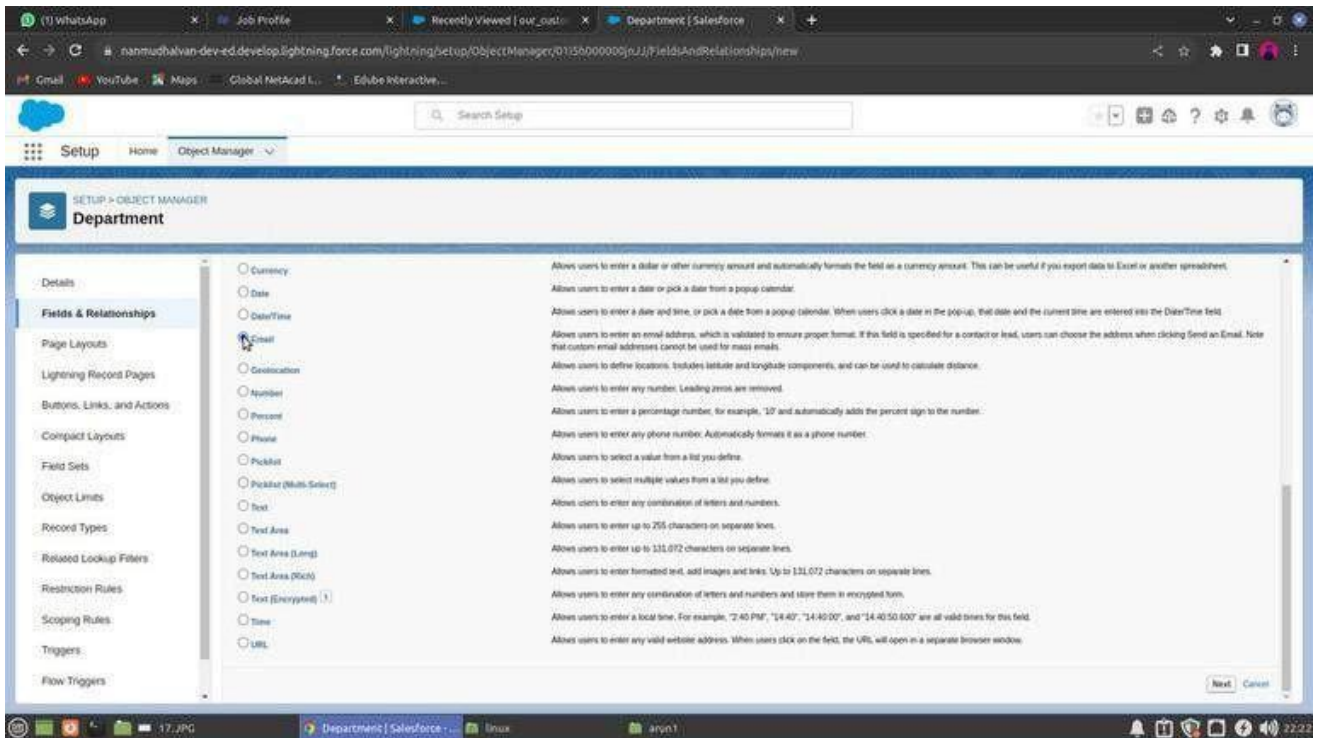
Enter Record Name Label and Format

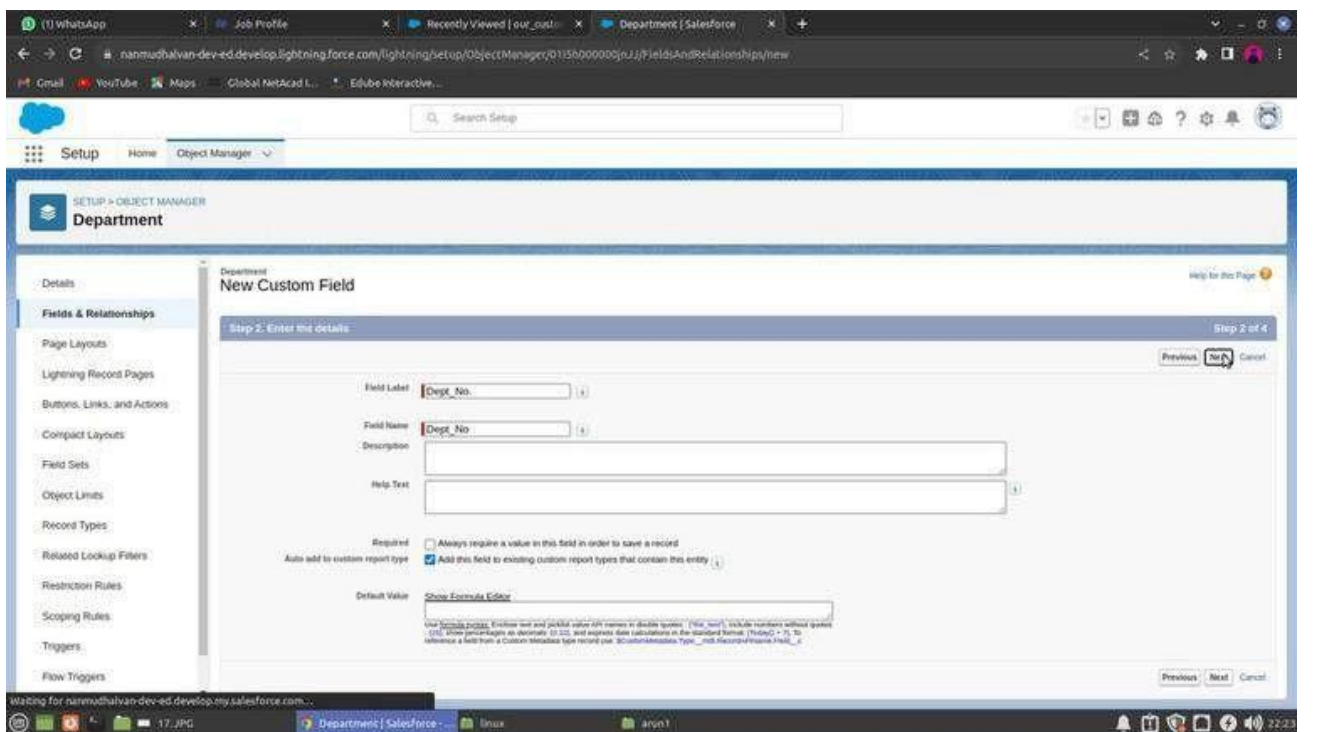
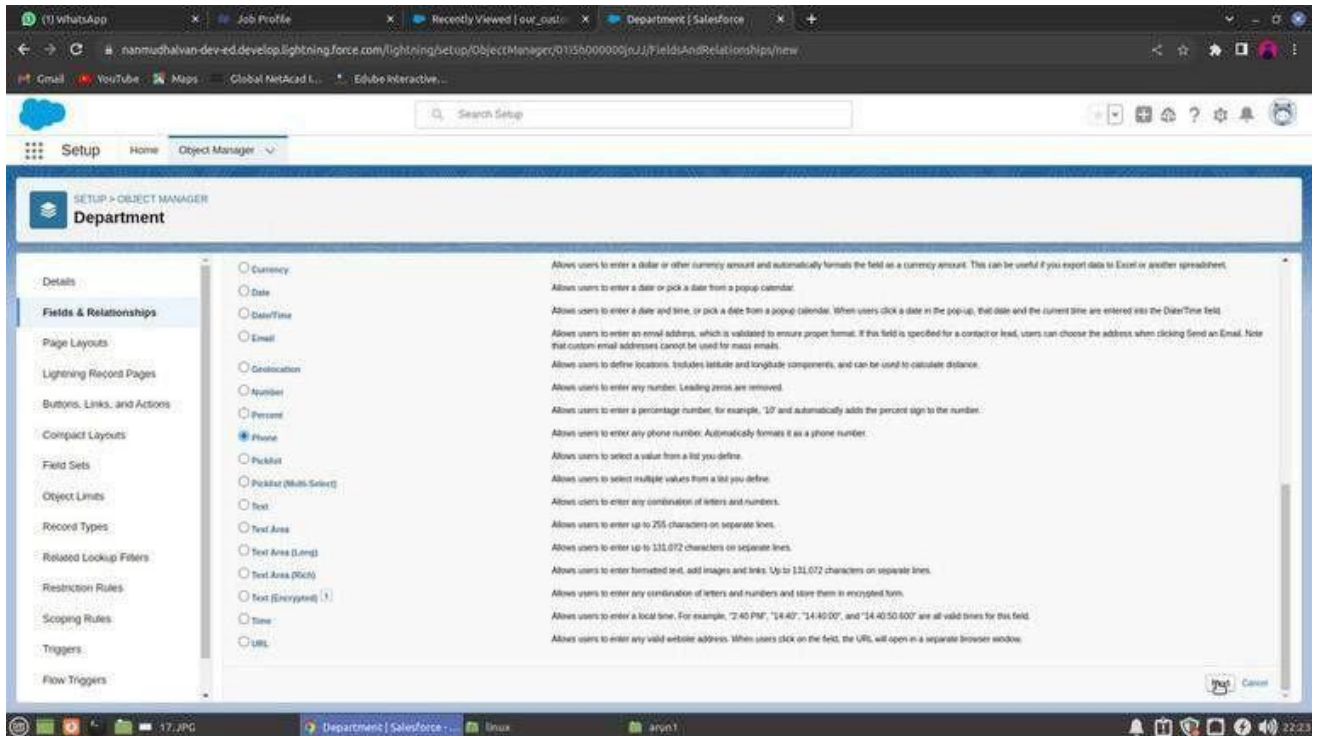
The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

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 report 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

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 Step 2 of 5

Field Label:

Field Name:

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

College

Details:

- Fields & Relationships
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- Related Lookup Filters
- Search Layouts

### College

## New Custom Field

Step 3. Define the summary calculation Step 3 of 5

Select Object to Summarize

Master Object: College

Summarized Object:

Select Roll-Up Type

☒ COUNT

☐ SUM

☐ MIN

☐ MAX

Field to Aggregate:

Filter Criteria

☒ All records should be included in the calculation

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

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 ⓘ

\* Developer Name ⓘ

Description ⓘ

#### App Branding

Image ⓘ

Upload

Primary Color Hex Value ⓘ

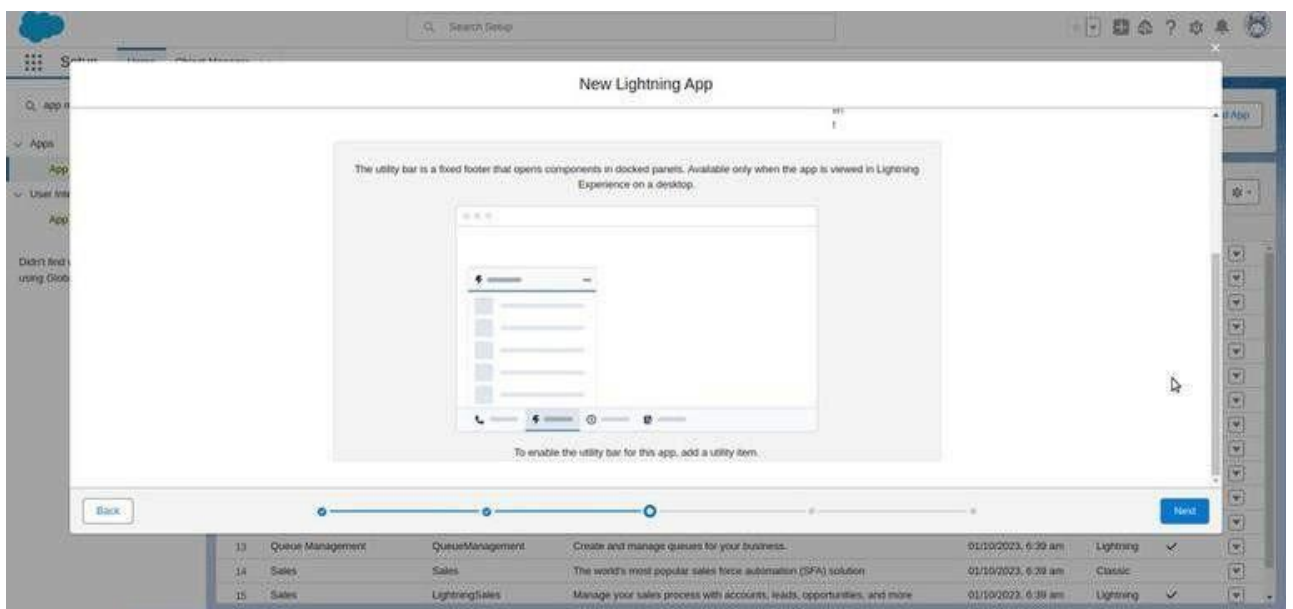
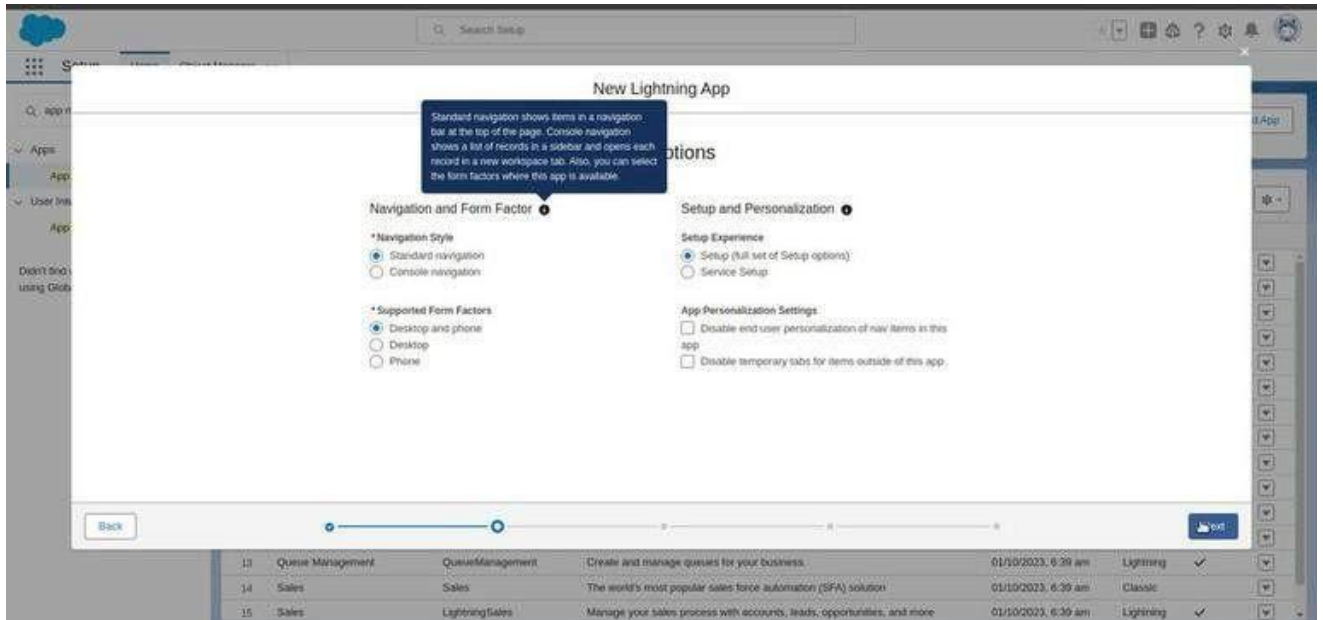
Org Theme Options

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

**App Launcher Preview**

[Next](#)

ID	Label	API Name	Description	Created	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 includes a sidebar on the left with navigation options like 'App', 'Data', 'Maps', 'Apps', 'Components', 'External Services', 'Lightning', and 'Mobile'. The main content area is titled 'New Lightning App' and contains two primary sections: 'App Details' and 'App Branding'. In the 'App Details' section, the 'App Name' is set to 'My\_App', the 'Developer Name' is 'My\_App', and the 'Description' field is empty. The 'App Branding' section shows a blue square image with a white 'M' and a primary color hex value of '#0070C2'. Below these sections is the 'App Launcher Preview' which shows a blue button with the text 'My' and a grey button with the text 'My\_App'. A 'Next' button is located at the bottom right of the configuration window. At the bottom of the screen, a table lists various Salesforce applications and their details.

ID	Name	Label	Description	Created Date	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 Salesforce Lightning App Builder interface. A modal window titled "New Lightning App" is open, showing the process of selecting features for a new app. The modal is divided into two main sections: "Available Features" on the left and "Selected Features" on the right. In the "Available Features" section, a search bar contains the text "sy", and a list item "Salesforce API Only System Integrations" is visible. In the "Selected Features" section, the item "System Administrator" is listed. Below these sections is a horizontal timeline with five markers. At the bottom right of the modal is a "Save & Finish" button. The background interface shows the Salesforce App Manager sidebar on the left and a table of app configurations at the bottom.

ID	Name	App Name	Description	Created At	Version	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	✓



colleges

Recently Viewed

0 items • Updated a few seconds ago

New

Import

Change Owner

college Name

New college

\* = Required information

Information

\* college Name

AVS 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

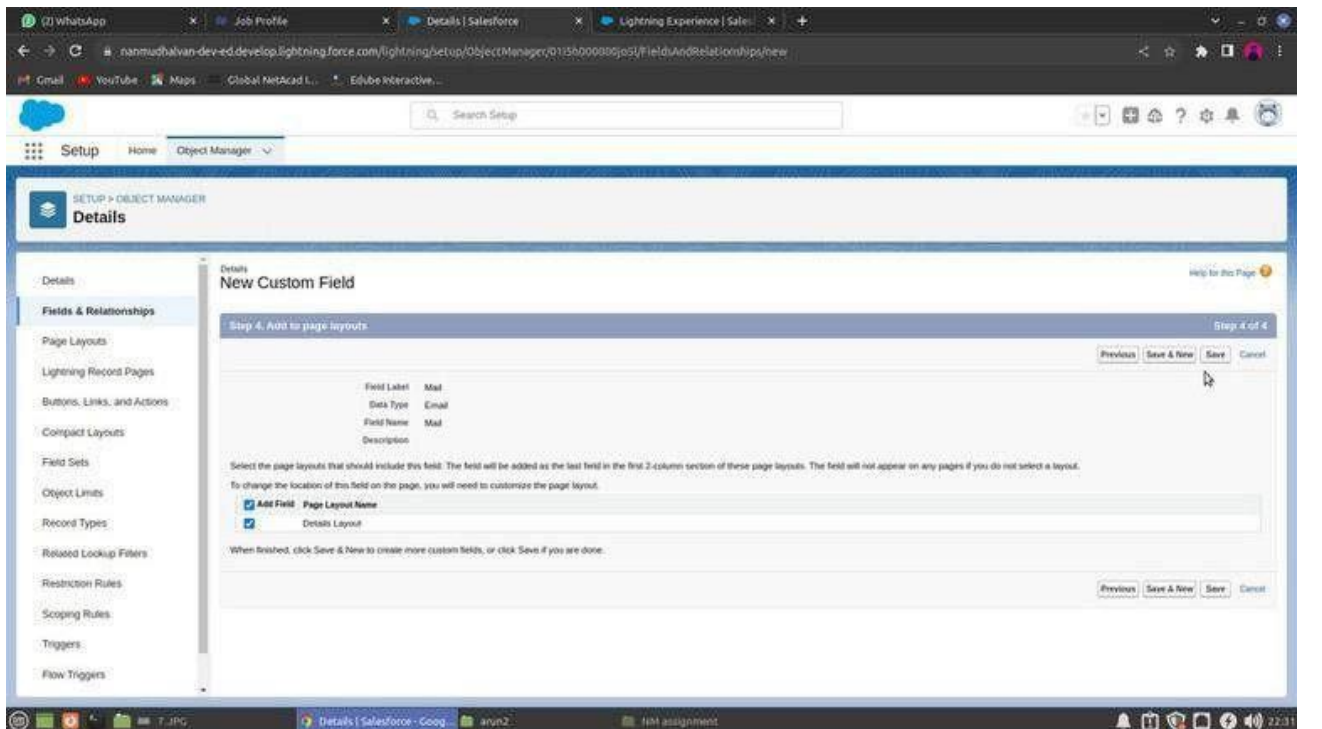
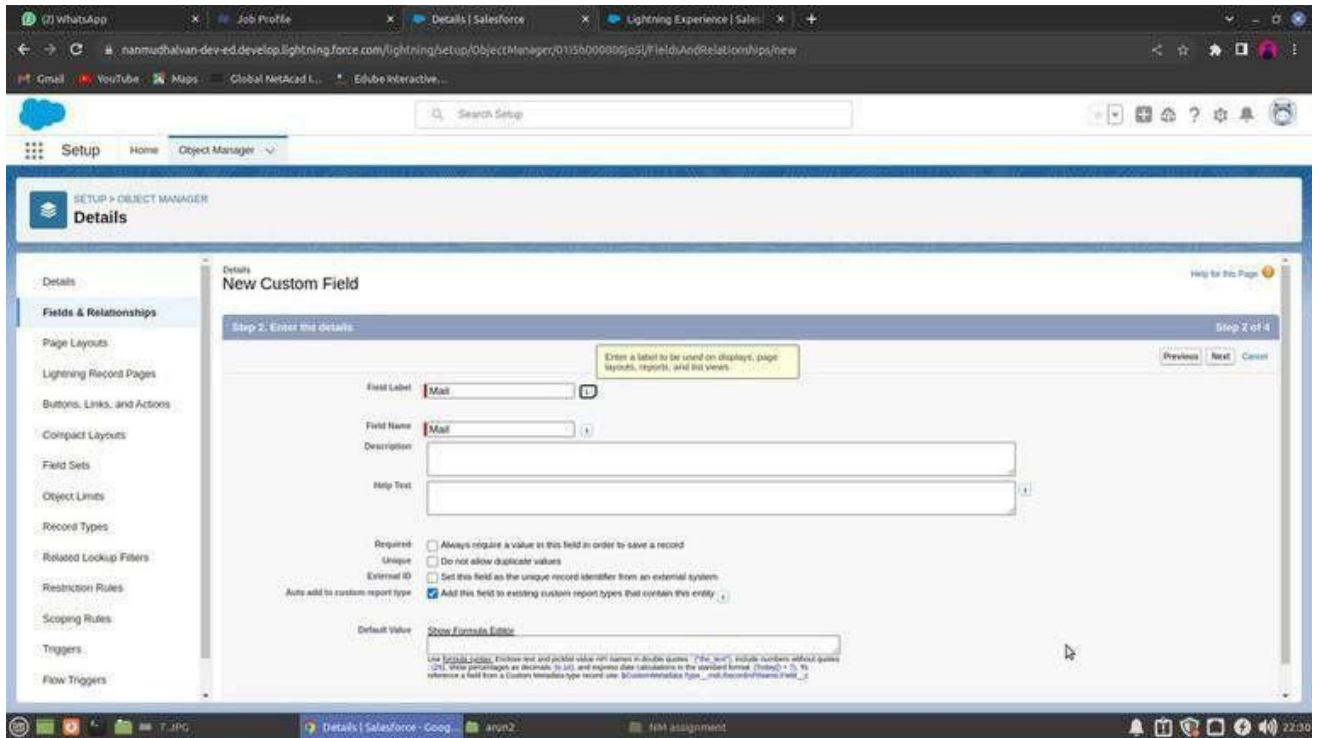
Fields & Relationships

Relationships

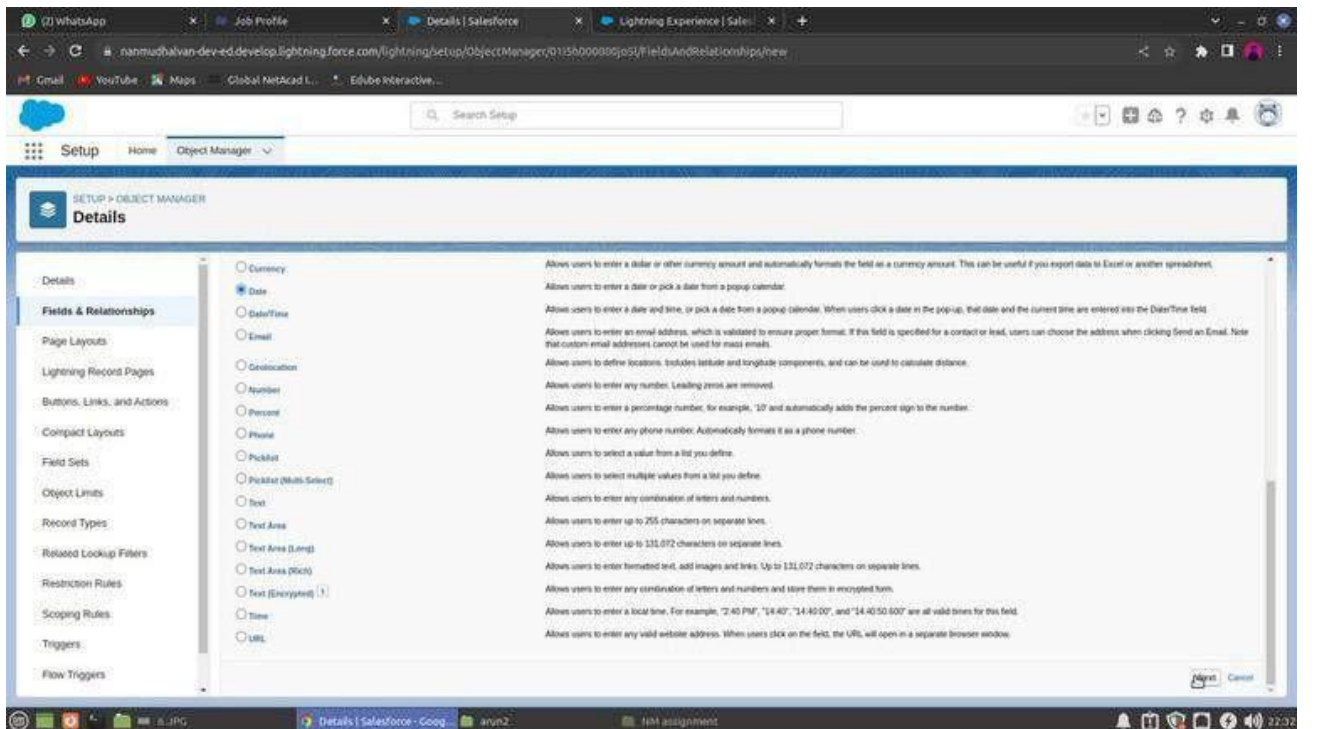
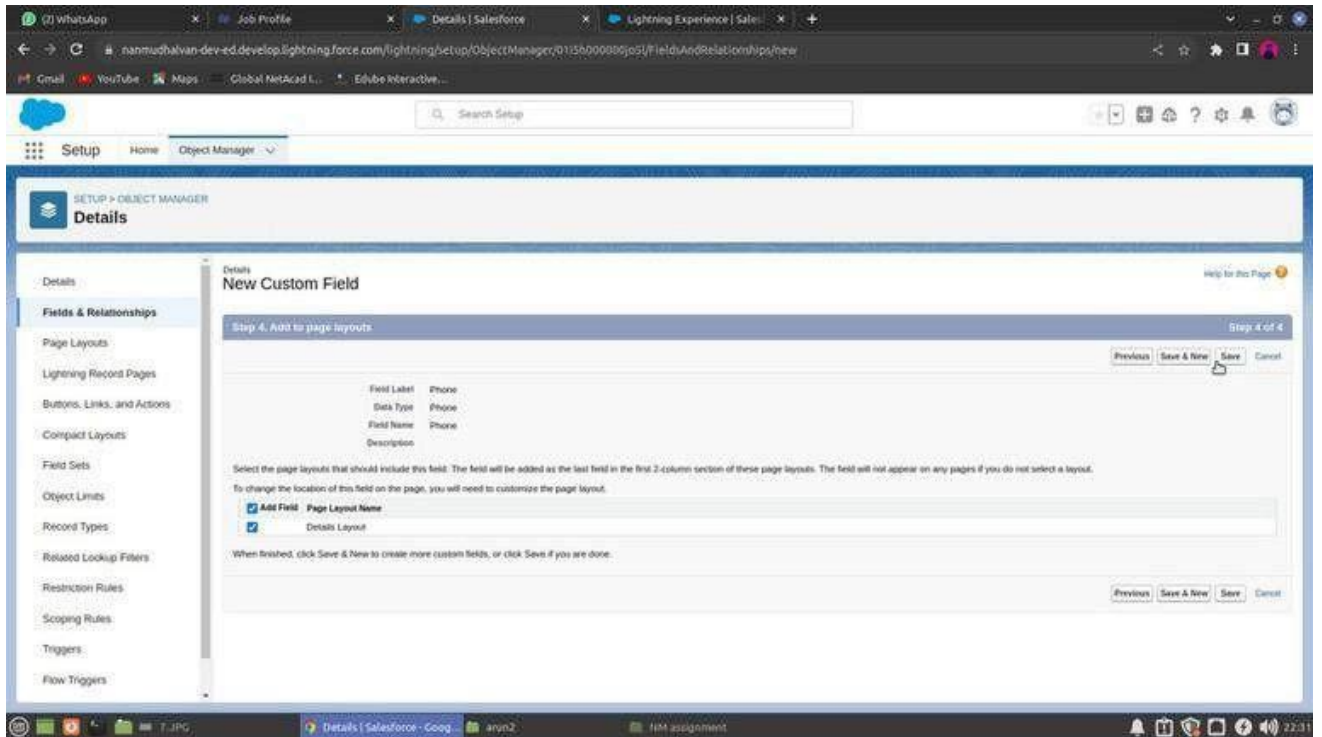
- ☐ Lookup Relationship  
Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
- ☐ Master Detail Relationship  
Creates a special type 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

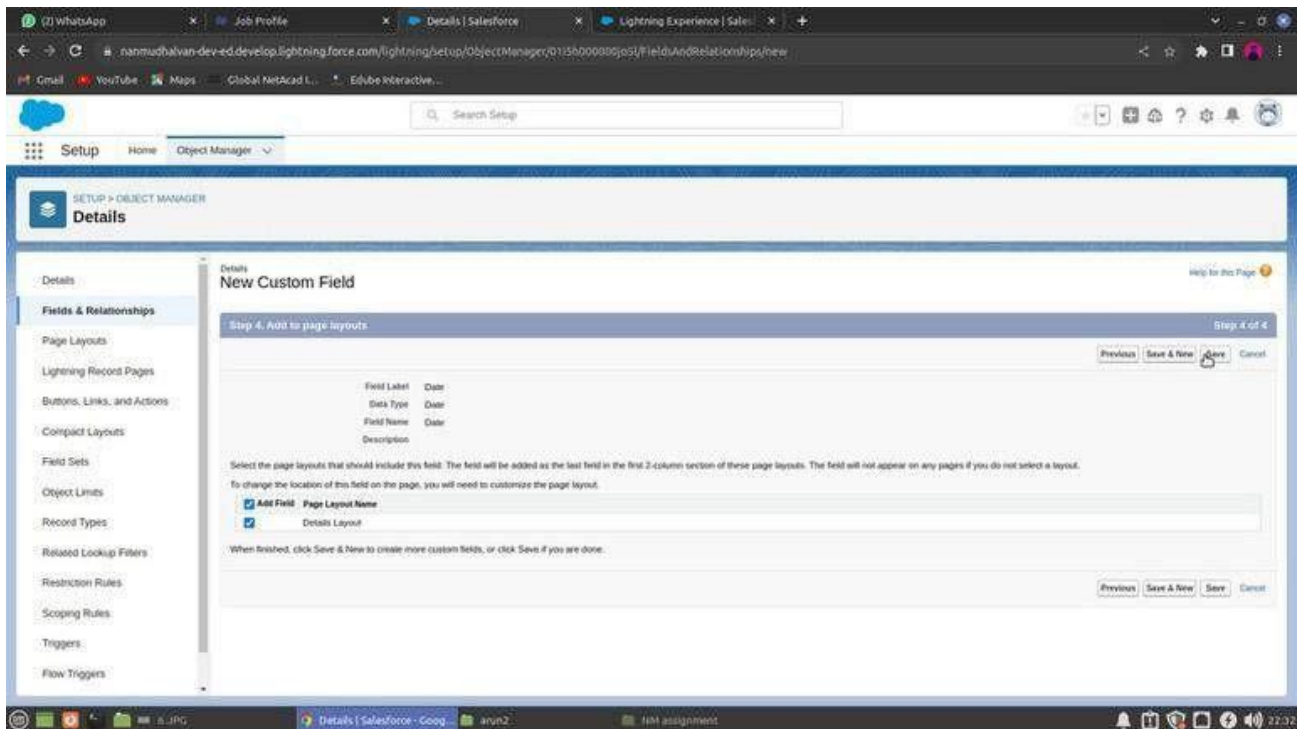
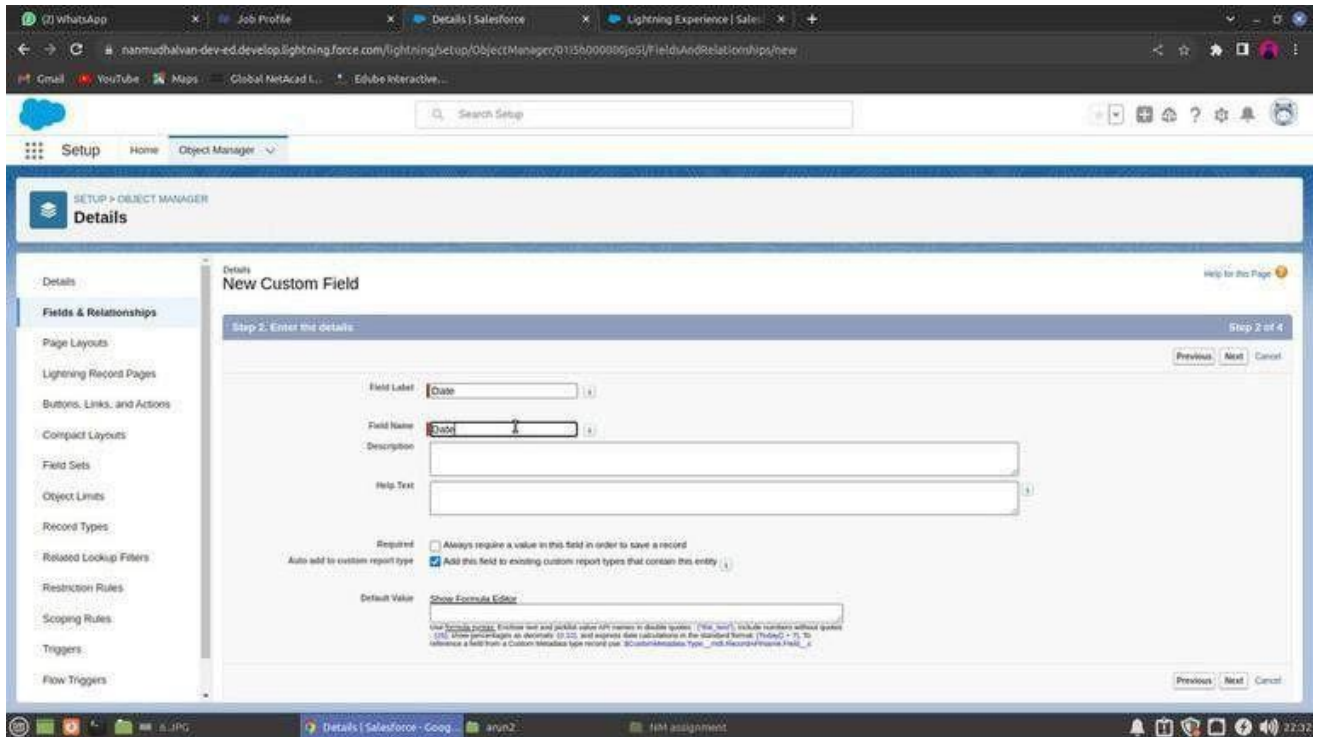
- ☐ Checkbox  
Allows users to select a True (checked) or False (unchecked) value.
- ☐ Currency  
Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
- ☐ Date  
Allows 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.



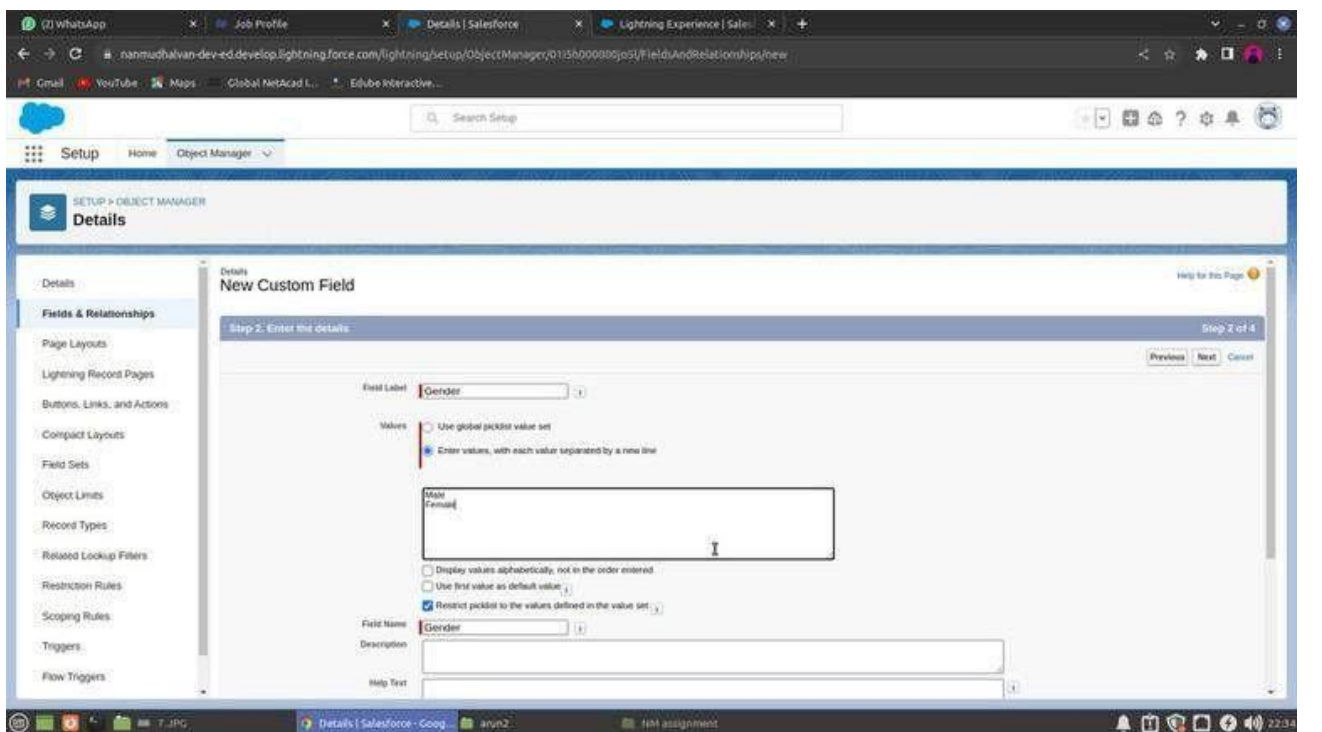
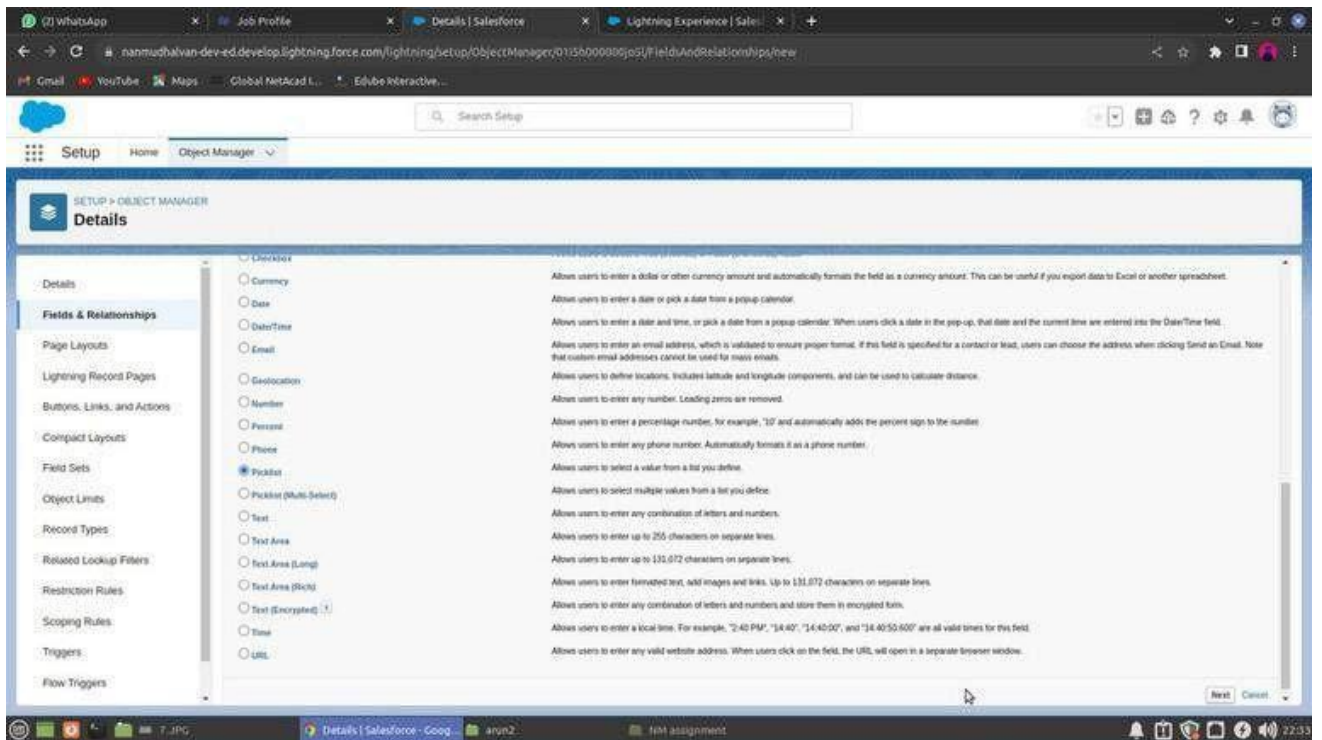












Setup > OBJECT MANAGER

## Details

Details

**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

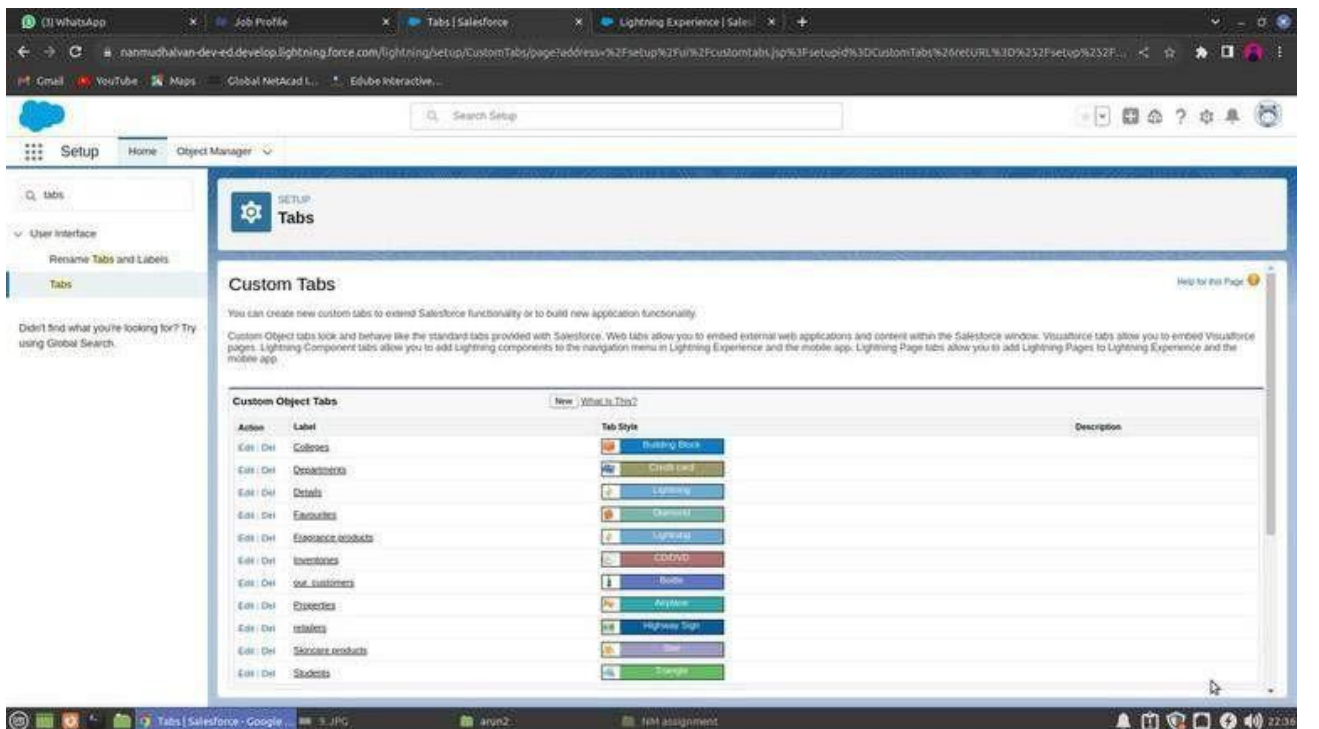
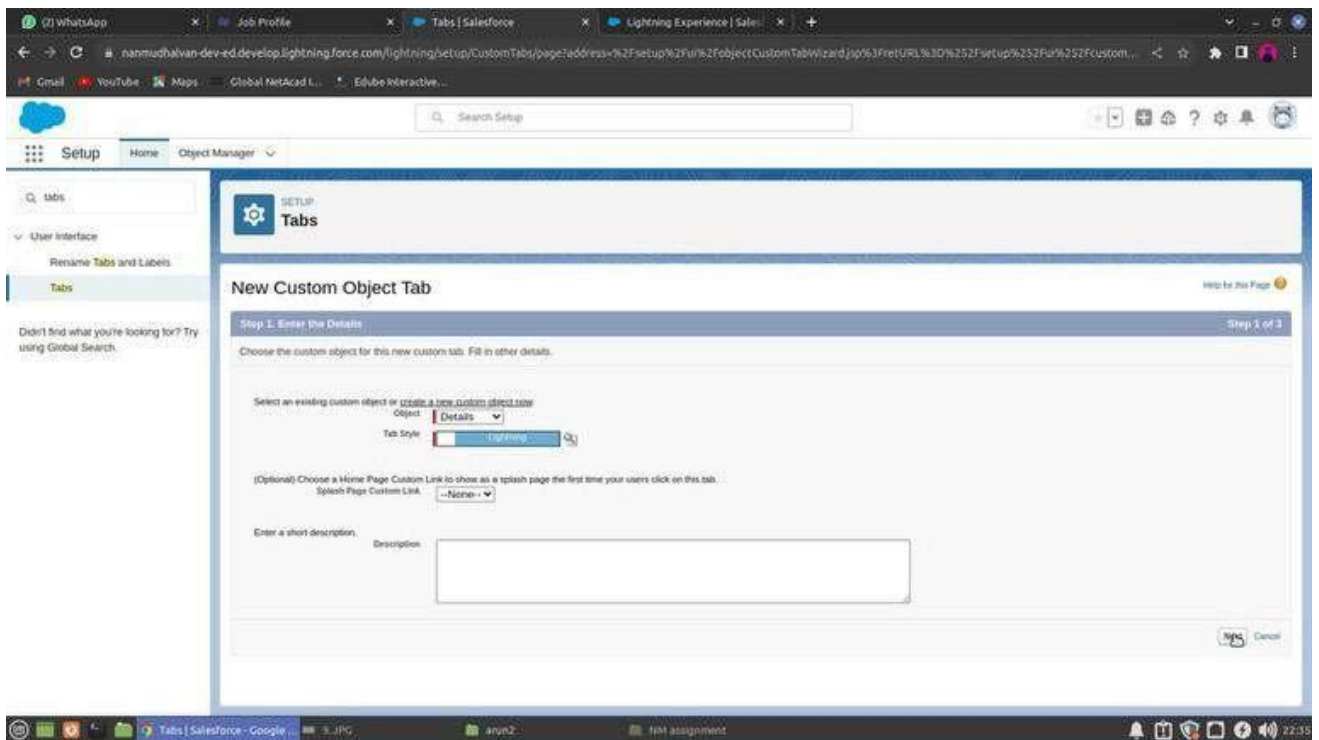
Details

**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			
Consultantrec	Screen Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Unmanaged		Apnail 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

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.

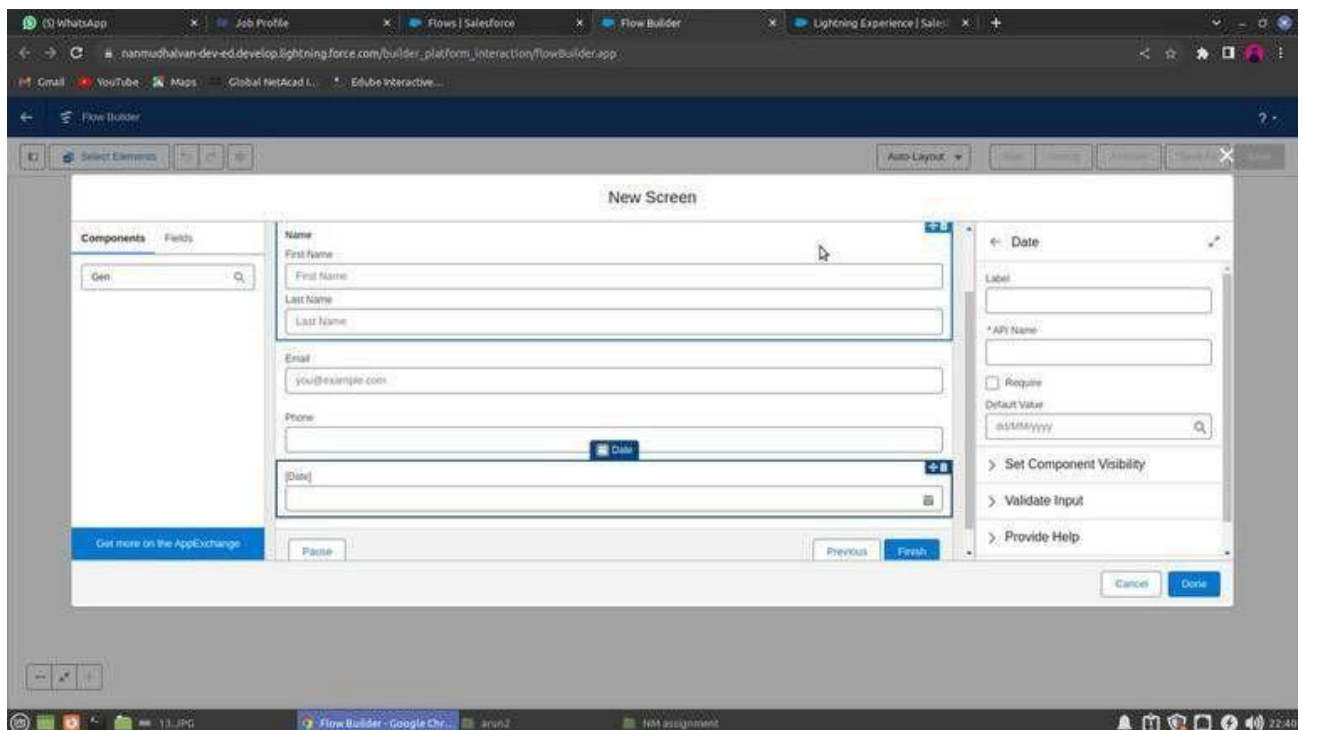
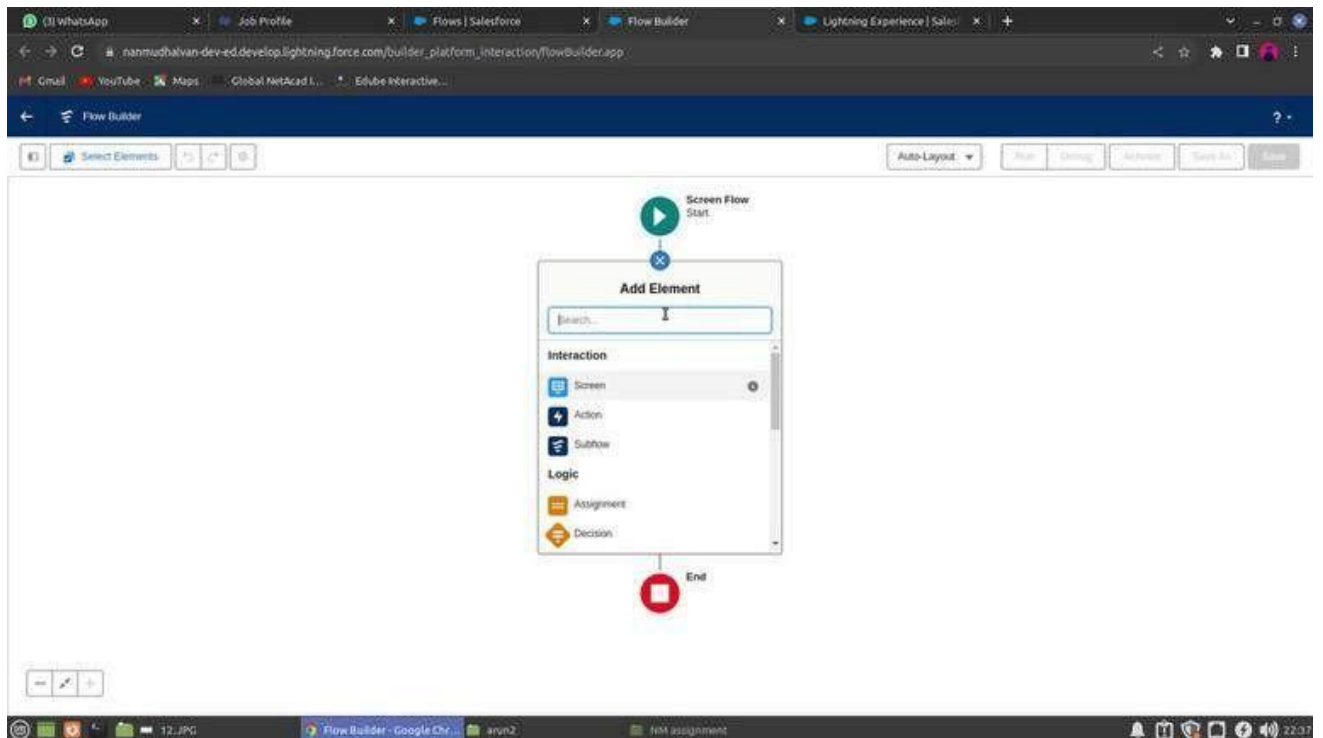
**Autolaunched Flow (No Trigger)**  
Launches when invoked by Apex, processes, REST API, and more. This autolaunched flow runs in the background.

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

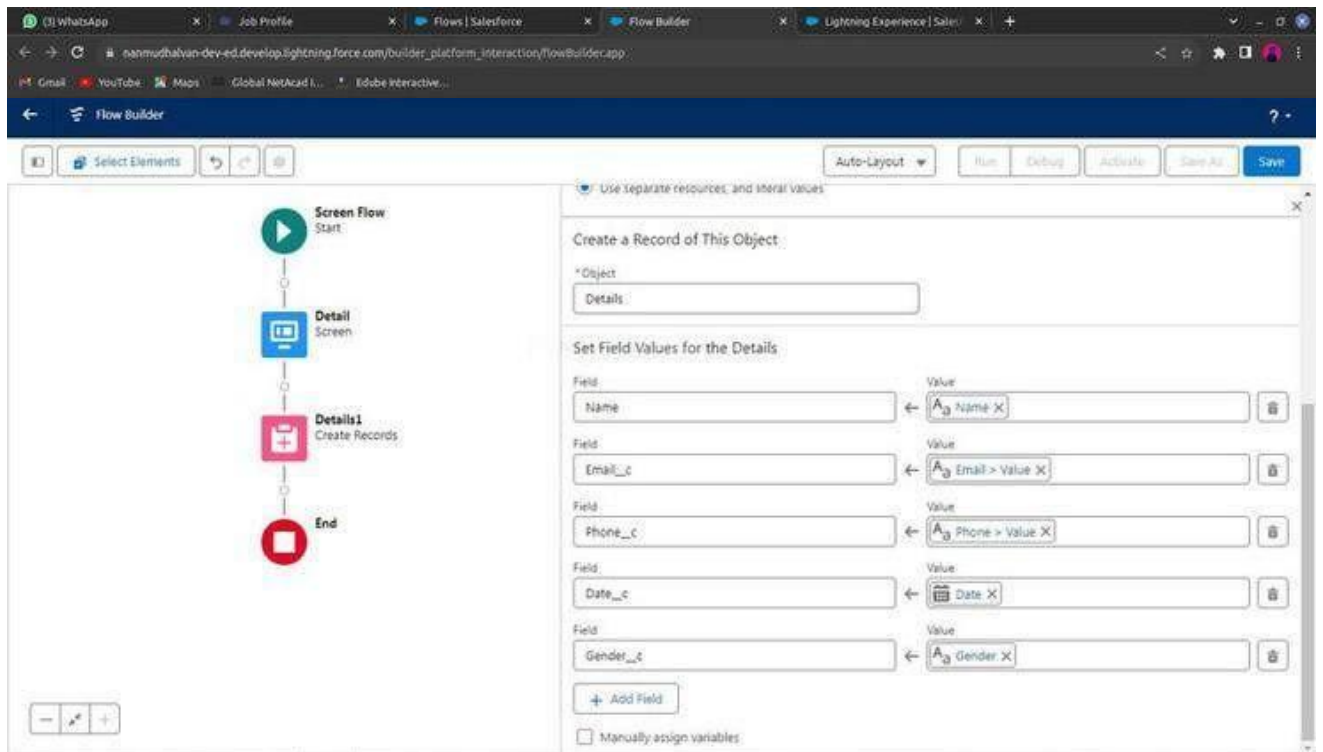
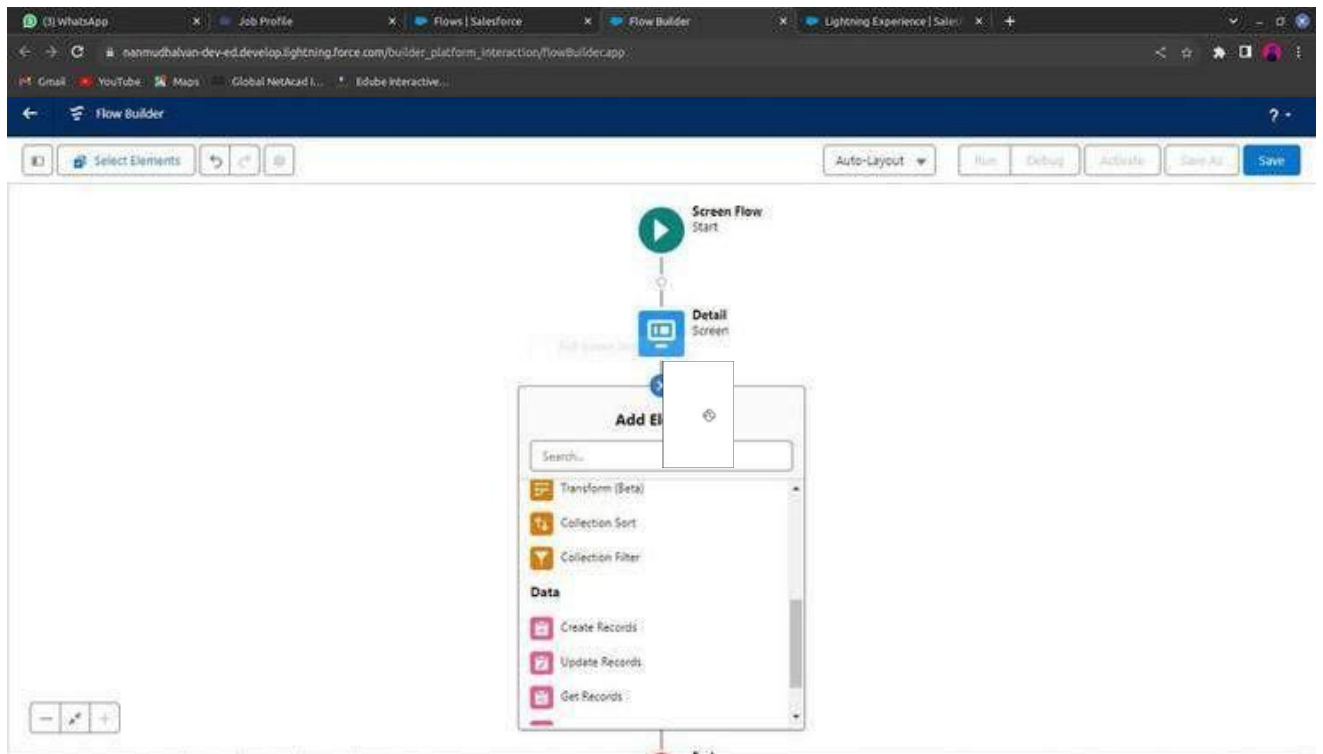
**Platform Event—Triggered Flow**  
Launches when a platform event message is received. This autolaunched flow runs in the background.

**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

sathishsk2003@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

sathishsk2003@gmail.com

Edit

Phone

6369914154

Edit

Date

22/09/2002


Edit


Gender

Male


Edit

Owner


 SATHISH KUMAR S



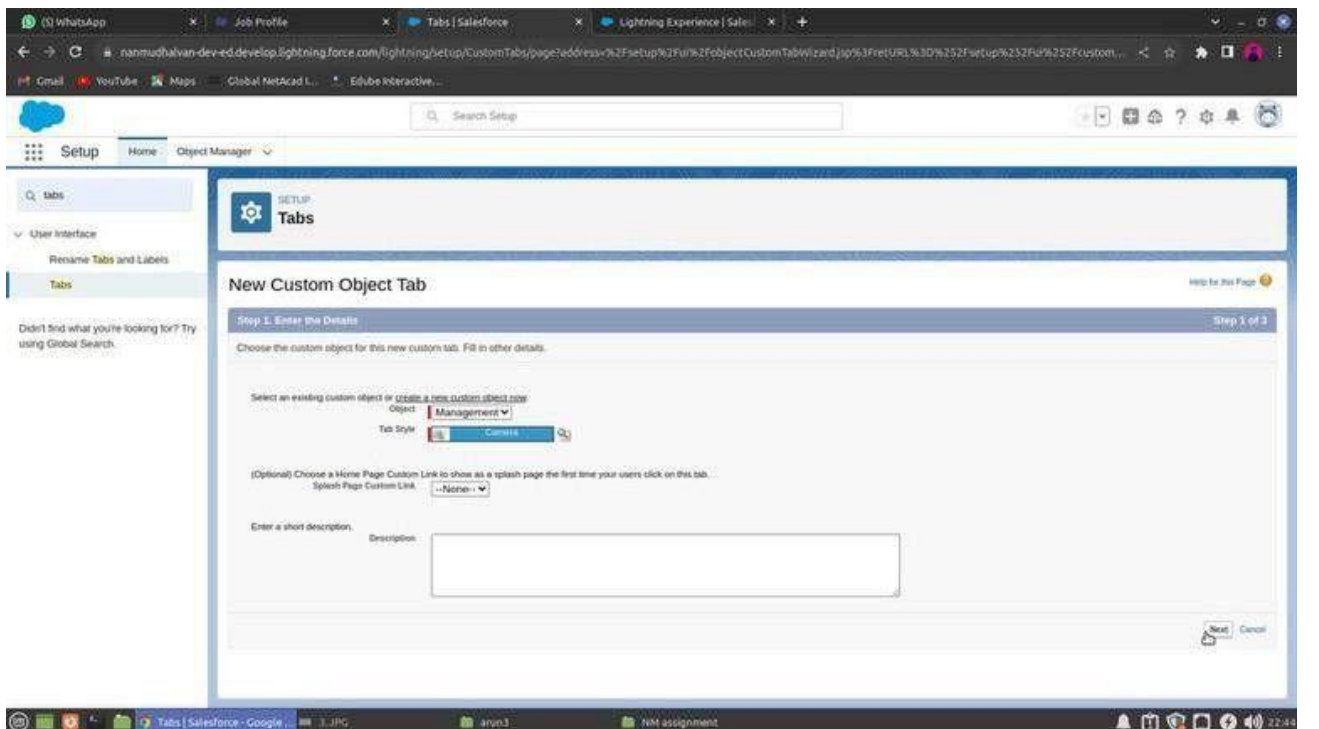
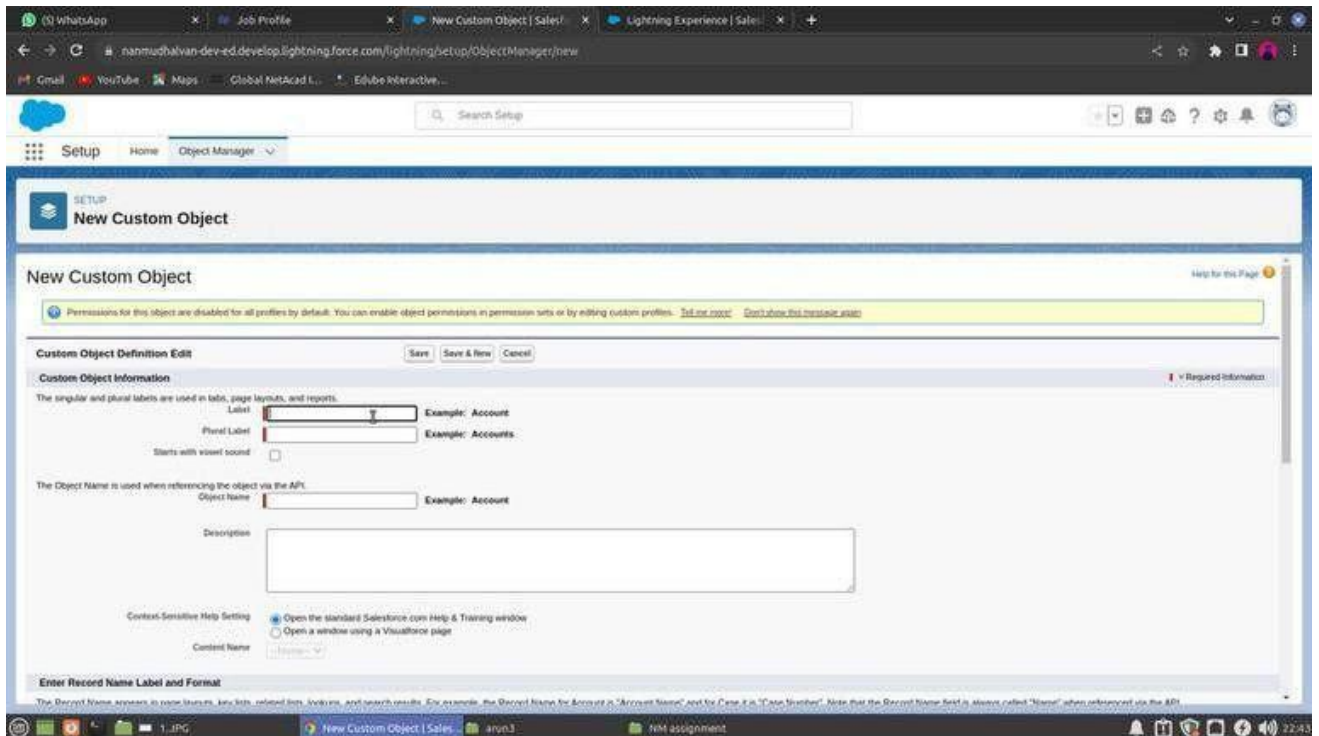
Created By

 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.



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 navigation changes in the Lightning Experience mobile app.

#### Custom Object Tabs

New | What is This?

Action	Label	Tab Style	Description
Edit   Del	Colleges	Bulking Block	
Edit   Del	Departments	Credit Card	
Edit   Del	Details	Lightning	
Edit   Del	Experiences	Standard	
Edit   Del	Experiences appdata	Lightning	
Edit   Del	Inventories	CCDVD	
Edit   Del	Managements	Camera	
Edit   Del	our customers	Route	
Edit   Del	Procedures	Apparel	
Edit   Del	retailers	Highway Sign	
Edit   Del	Skincare products	Ball	
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

Sales

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"/>

1-6 of 6 0 Selected 4 Previous Next >>

Page 1 of 1

Setup Home Object Manager

Search Setup

Hyperforce Assistant

Users

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Feature Settings

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Lead Processes

Sales

Products

Asset Settings

## 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"/>

Details

Management

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 Named Credential Access | Enabled External Credential Provider Access | Enabled Custom Metadata Type Access | Enabled Custom Setting Definition Access | Enabled Flow Access | Enabled Service Resource 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

Global: Global Layout | User Assignment |

Email Application: Not Assigned | User Assignment |

Home Page Layout: Home Page Default

Object Milestone: Object Milestone Layout | User Assignment |

Operating Hours: Operating Hours Layout | User Assignment |

Order: Order Layout



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

Address bar: [namudhalvan-dev-ed.develop.lightning.force.com/builder\\_platform\\_interaction/flowBuilder.app](https://namudhalvan-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.app)

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

### SETUP Users

#### New User

Click Green Tag

Help for this Page

User Edit Save Save & New Cancel

General Information

First Name: manager

Last Name: 1

Alias: m1

Email: manager.aaa@gmail.com

Username: manager.aaa@gmail.com

Nickname: User1697624338709764377

Title:

Company:

Department:

Division:

Role: Marketing Team

User License: Salesforce Platform

Profile: Manager

Active: ☒

Marketing User: ☐

Offline User: ☐

Knowledge User: ☐

Flow User: ☐

Service Cloud User: ☐

Site.com Contributor User: ☐

Site.com Publisher User: ☐

WDC User: ☐

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

Address bar: [namudhalvan-dev-ed.develop.lightning.force.com/builder\\_platform\\_interaction/flowBuilder.app](https://namudhalvan-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.app)

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

### SETUP Users

#### New User

Click Green Tag

Help for this Page

User Edit Save Save & New Cancel

General Information

First Name: manager

Last Name: 2

Alias: m2

Email: managerxyz.xyz@gmail.com

Username: managerxyz.xyz@gmail.com

Nickname: User1697624453759508865

Title:

Company:

Department:

Division:

Role: Marketing Team

User License: Salesforce

Profile: Solution Manager

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. [Learn more](#)

Search Setup

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"/> 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.app

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

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Functions

Sales

Accounts

Person Accounts

Salesforce Scheduler

Assignment Policies

Salesforce Scheduler

## SETUP Permission Sets

manager12

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

### Permission Set Overview

Property	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: nanmudbayan-dev-ed.develop.lightning.force.com/builder\_platform\_interaction/flowBuilder.app

Page title: Setup

Search Setup

Setup Home Object Manager

Hyperforce Assistant

Lightning Experience Transition Assistant

Users

Permission Set Groups

Permission Sets

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Settings

Functions

Sales

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

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	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

Search Setup

per

Hyperforce Assistant

Lightning Experience Transition Assistant

Users

Permission Set Groups

Permission Sets

Feature Settings

Digital Experiences

Settings

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Sales

Accounts

Person Accounts

Salesforce Scheduler

Assignment Policies

Salesforce Scheduler

### 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

Search Setup

per

Hyperforce Assistant

Lightning Experience Transition Assistant

Users

Permission Set Groups

Permission Sets

Feature Settings

Digital Experiences

Settings

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Sales

Accounts

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.



Setup Home 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. [Get more info](#) [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 new buttons, new links, related lists, toolbars, 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.

Setup Home Object Manager

## New Custom Object Tab

Step 1 of 3: Enter the Details

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:

Tab Style:

(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:

Enter a short description.

Description:

Next Cancel



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 object permissions](#) [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, 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.

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](https://naamudhalvan-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.app)

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

Navigation: Setup, Home, Object Manager

Left Sidebar: 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

Section: SETUP > OBJECT MANAGER Customer

Sub-Section: 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
  - A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
- ☐ Formula
  - A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
- ☐ Roll-Up Summary
  - A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
- ☐ Lookup Relationship
  - Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
- ☒ Master-Detail Relationship
  - Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:
    - The relationship field is required on all detail records.
    - The ownership and sharing of a detail record are determined by the master record.
    - When a user deletes the master record, all detail records are deleted.
    - You can create roll-up summary fields on the master record to summarize the detail records.The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.
- ☐ External Lookup Relationship
  - Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

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](https://naamudhalvan-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.app)

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

Navigation: Setup, Home, Object Manager

Left Sidebar: 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

Section: SETUP > OBJECT MANAGER Customer

Sub-Section: 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

Buttons: Previous, Save & New, Save, Cancel

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 (0) | Enabled New Cases Access (0) | Enabled View/Write Page Access (0) | Enabled External Data Source Access (0) | Enabled Named Credential Access (0) | Enabled Schema Explorer Preview Access (0) | Enabled Custom Metadata Type Access (0) | Enabled Custom Setting Definition Access (0) | Enabled Data Access (0) | Enabled Service Presence Status Access (0) | Enabled Custom Permissions (0)

**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 2 18/10/2023, 3:34 pm

**Page Layouts**

Standard Object Layouts	Global	Object Milestone
Email Application	Global Layout <a href="#">View Assignment</a>	Object Milestone Layout <a href="#">View Assignment</a>
Home Page Layout	Not Assigned <a href="#">View Assignment</a>	Operating Hours <a href="#">View Assignment</a>
	Home Page Default <a href="#">View Assignment</a>	Order <a href="#">View Assignment</a>

Clone Profile

Enter the name of the new profile.

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

Existing Profile	User License	Profile Name
Standard Platform User	Salesforce Platform	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](https://naamudhalvan-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.app)

Search Setup

Setup Home Object Manager

Hyperforce Assistant

Users

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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		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](https://naamudhalvan-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.app)

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### SETUP Profiles

Contact Point Consents: ☒ ☒ ☒ ☒ ☐

Contact Point Emails: ☒ ☒ ☒ ☒ ☐

Streaming Channels: ☒ ☒ ☒ ☒ ☐

User External Credentials: ☐ ☐ ☐ ☐ ☐

#### Custom Object Permissions

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



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Users

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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

Setup | Home | Object Manager

Search Setup

Q: prof

Users

Profiles

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

### Profiles

Contact Point Addresses: ☐ ☐ ☐ ☐ ☐ ☐

Contact Point Consents: ☒ ☒ ☒ ☒ ☐ ☐

Contact Point Emails: ☒ ☒ ☒ ☒ ☐ ☐

Setters: ☒ ☒ ☒ ☒ ☐ ☐

Streaming Channels: ☒ ☒ ☒ ☒ ☐ ☐

User External Credentials: ☐ ☐ ☐ ☐ ☐ ☐

#### Custom Object Permissions

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

Setup | Home | Object Manager

Search Setup

Q: prof

Users

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.cs

Username: managersales.123@gmail.cs

Nickname: User1697625227951209885

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: ☐



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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

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Users

Permission Set Groups

Permission Sets

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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

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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

18/10/2023, 4:06 pm

Last Modified By

18/10/2023, 4:06 pm

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...

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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	<input type="checkbox"/> Read Access	<input type="checkbox"/> 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

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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...

Columns: ☐ Total Life Time Value, Name

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

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