

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

Name: Sharma G

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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 notes](#) [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...

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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 notes](#) [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.

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

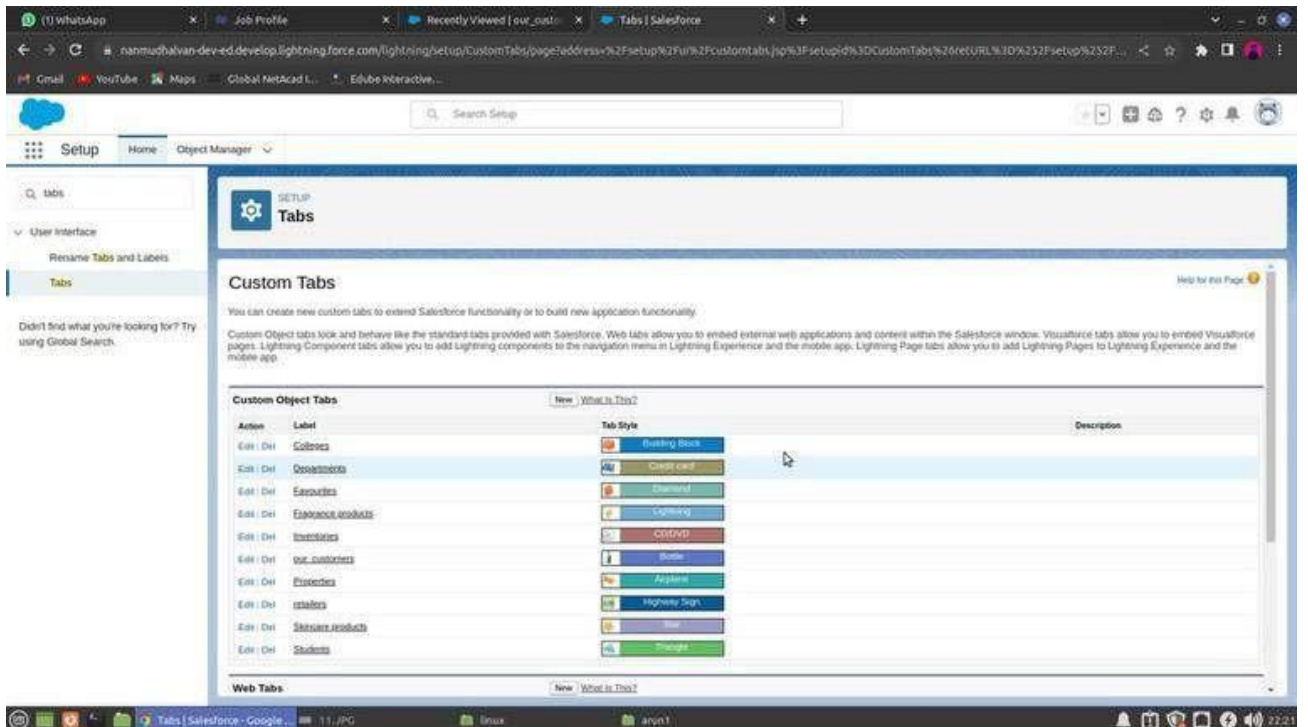
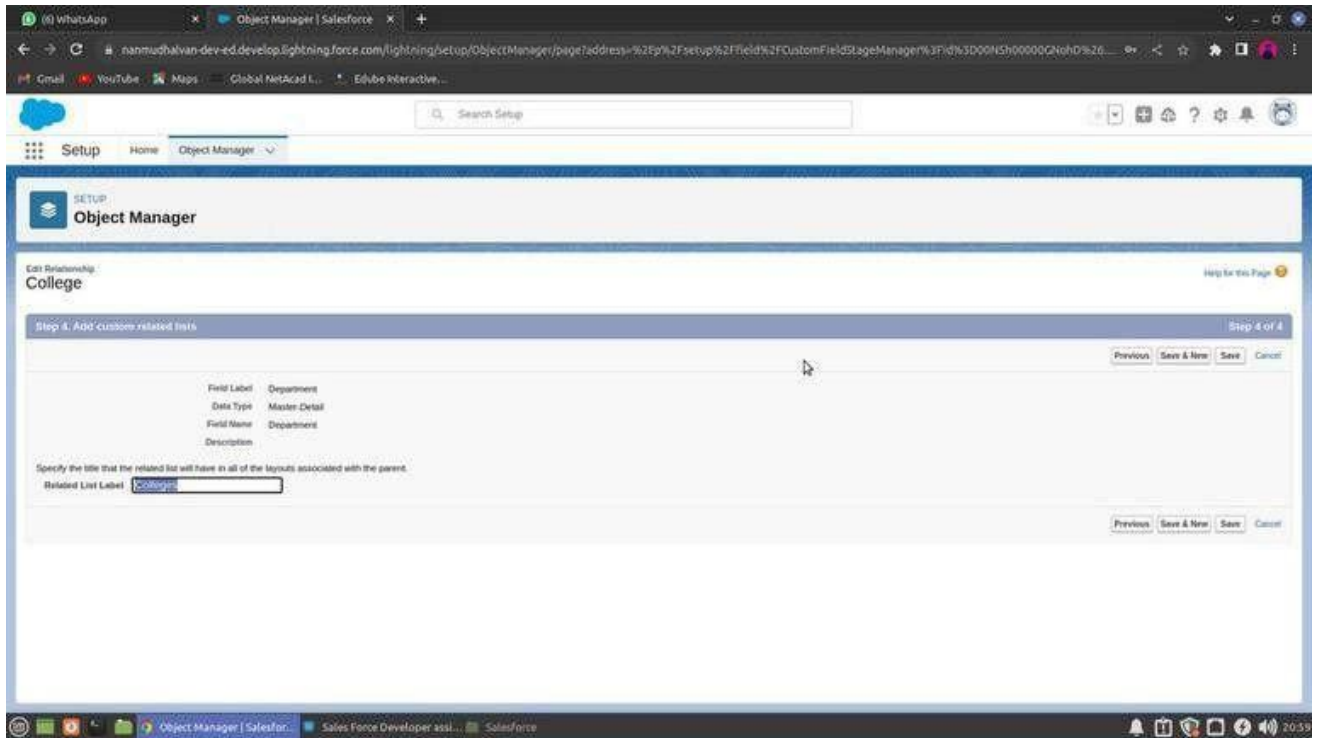
Content Name

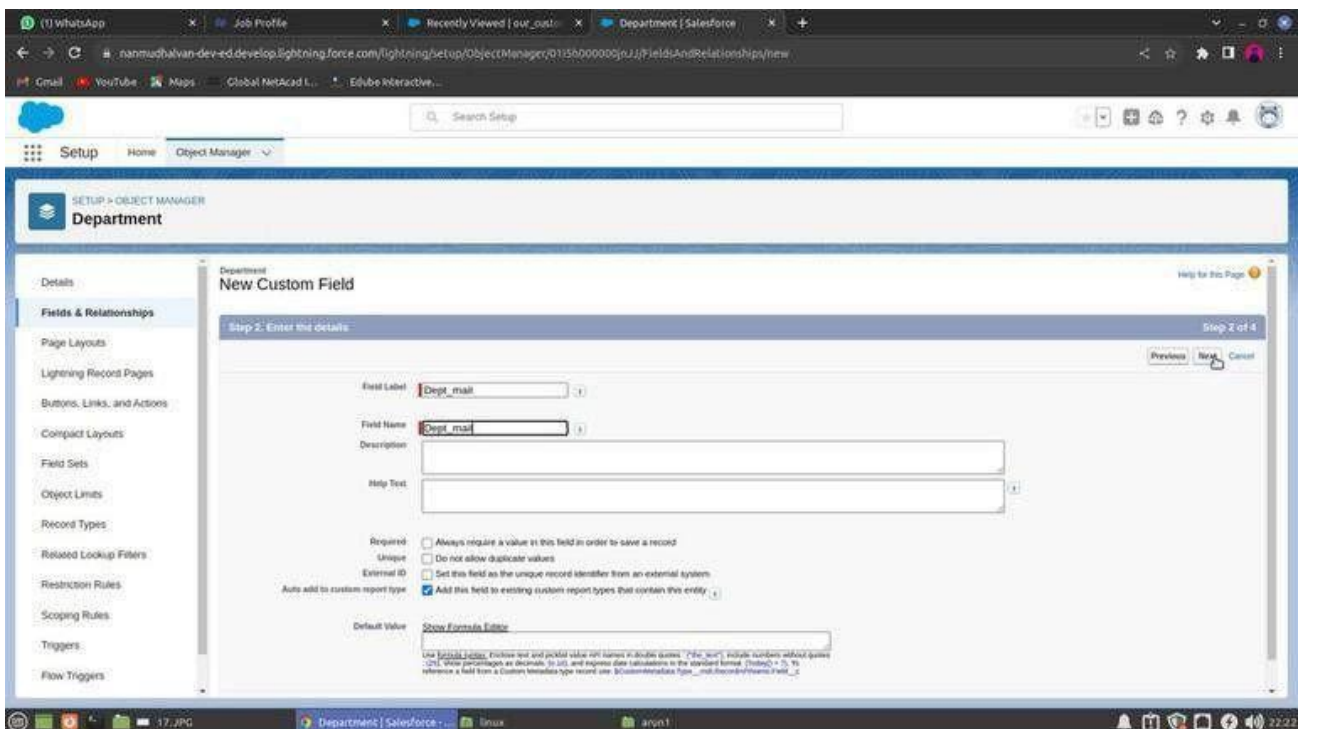
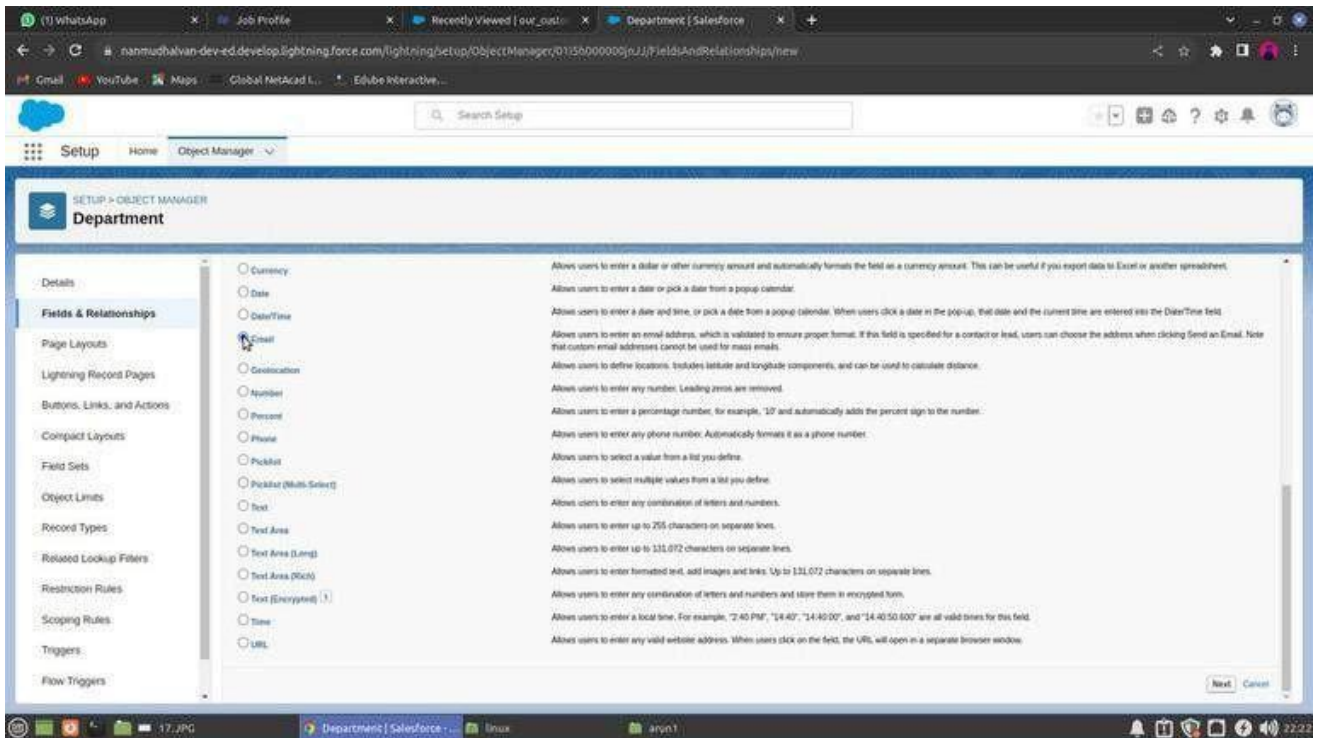
Enter Record Name Label and Format

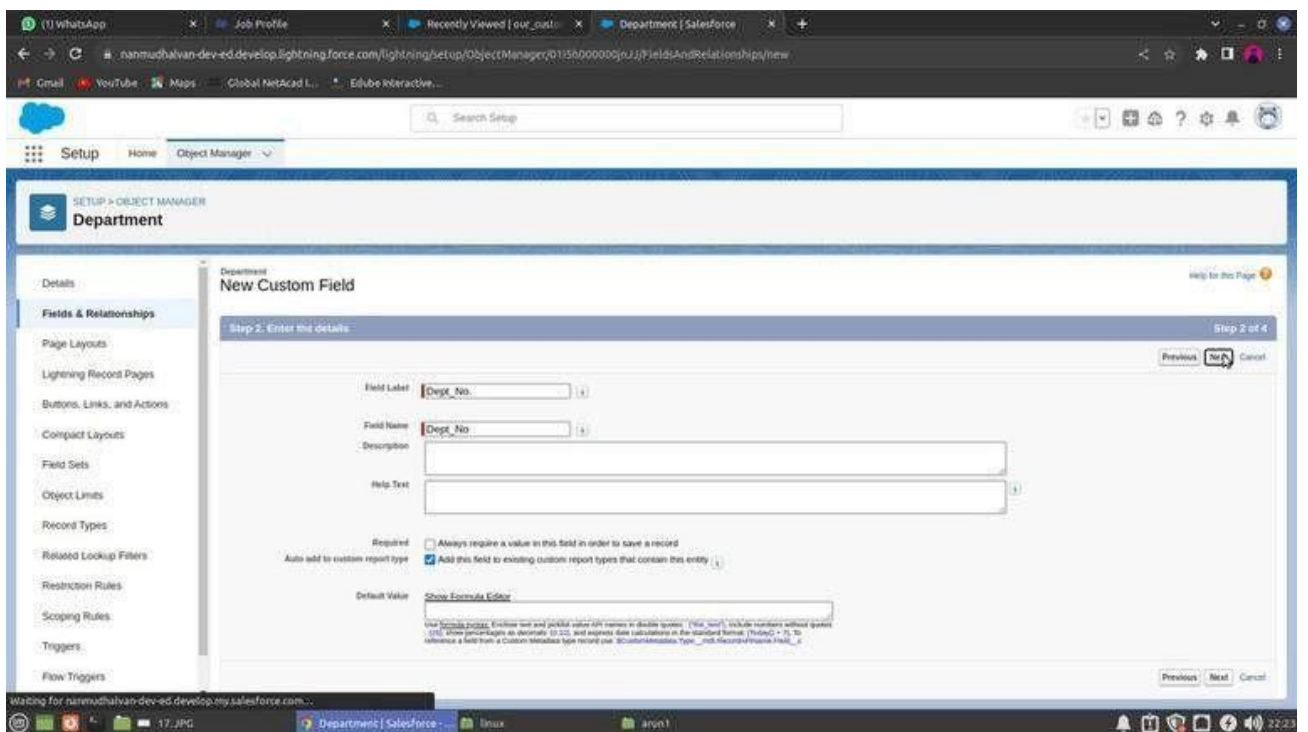
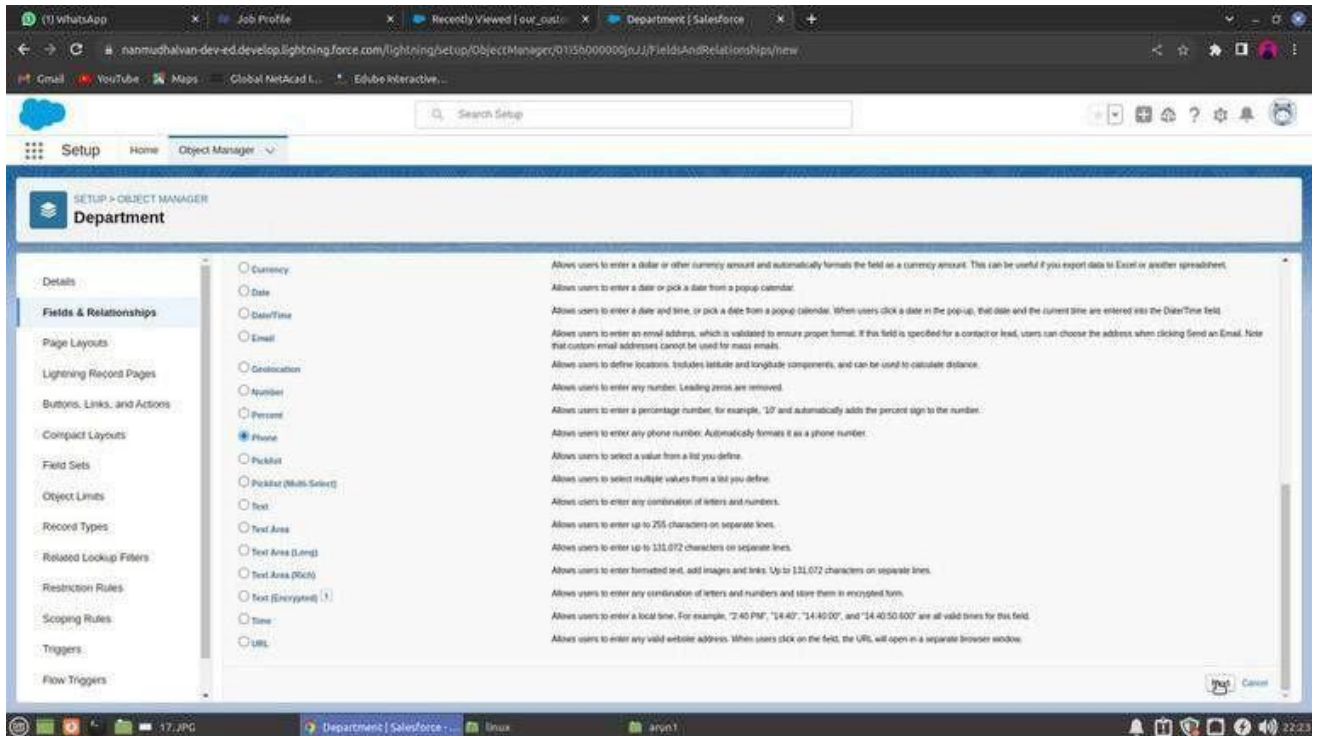
The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

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:

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### 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	
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

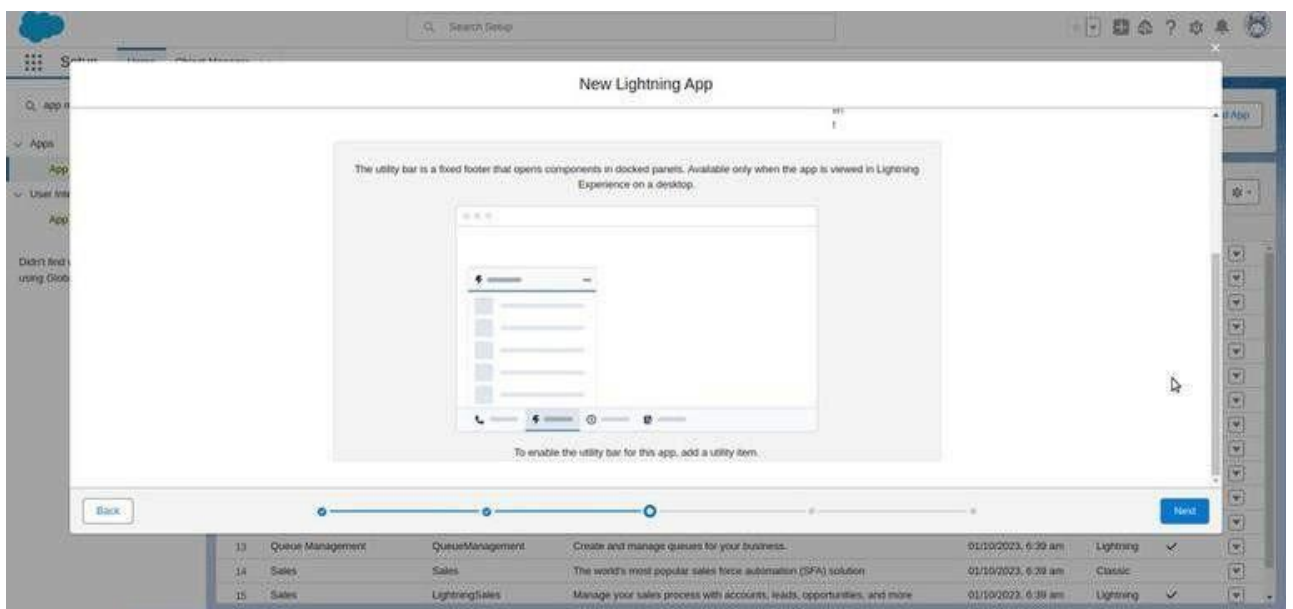
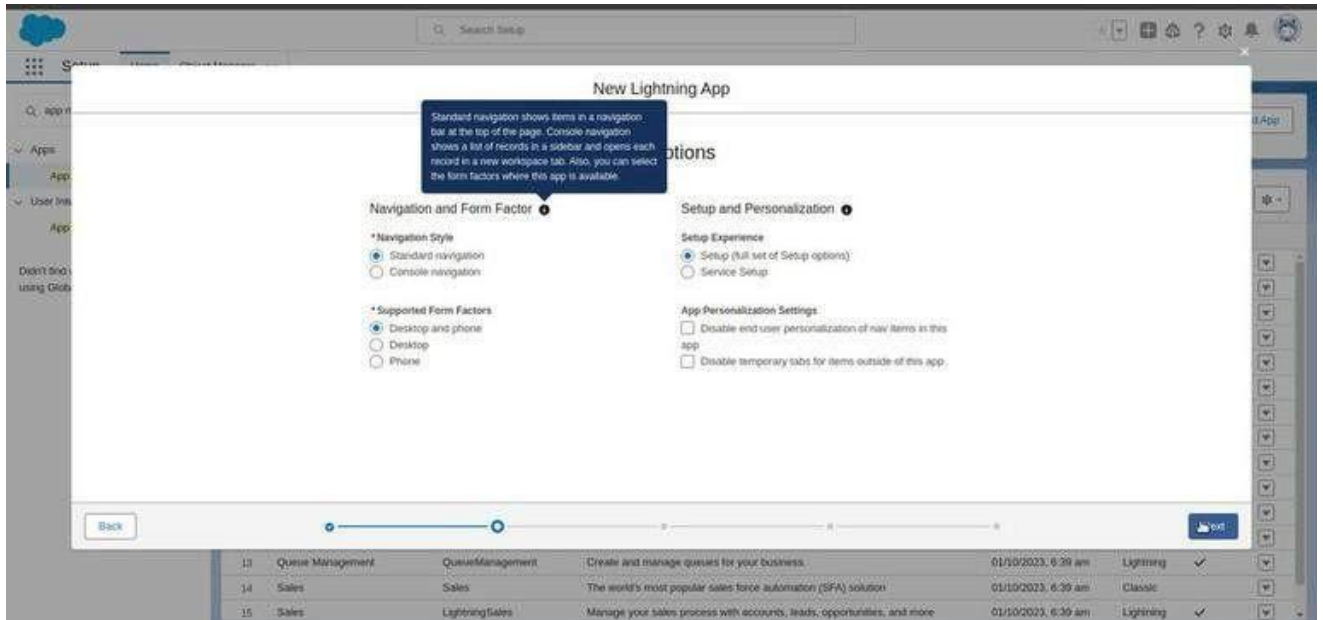
**Orig Theme Options**

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

**App Launcher Preview**

[Next](#)

ID	App Name	App Description	Created By	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 'New Lightning App' configuration window in Salesforce. The interface is clean and modern, with a white background and grey borders. The left sidebar shows the navigation menu with 'Apps' selected. 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' and 'Developer Name' fields are both set to 'My\_App'. The 'Description' field is currently empty. The 'App Branding' section includes an 'Image' field with a blue square icon and an 'Upload' button, a 'Primary Color Hex Value' field set to '#0070C2', and an unchecked checkbox for 'Use the app's image and color instead of the org's custom theme'. Below these is a preview of the app launcher with two buttons: a blue one labeled 'My' and a grey one labeled 'My\_App'. A 'Next' button is located at the bottom right of the configuration window. The bottom of the image shows a table of installed apps, including 'Queue Management', 'Sales', and 'Lightning Sales', with their respective descriptions and installation dates.

The screenshot displays the Salesforce Lightning App Builder interface. A 'New Lightning App' dialog is open, showing two columns: 'Available Features' and 'Selected Features'. The 'Available Features' column contains a search bar with 'sy' and a list item 'Salesforce API Only System Integrations'. The 'Selected Features' column contains 'System Administrator'. Navigation arrows are between the columns. At the bottom of the dialog are 'Back' and 'Save & Finish' buttons. The background shows the Salesforce App Launcher with a table of installed apps.

App	Version	Category	Description	Installed On	Version	Status
Queue Management	13	Queue Management	Create and manage queues for your business.	01/10/2023, 6:39 am	Lightning	✓
Sales	14	Sales	The world's most popular sales force automation (SFA) solution	01/10/2023, 6:39 am	Classic	
LightningSales	15	Sales	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

college Name

NewImportChange Owner

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

Related

Details

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

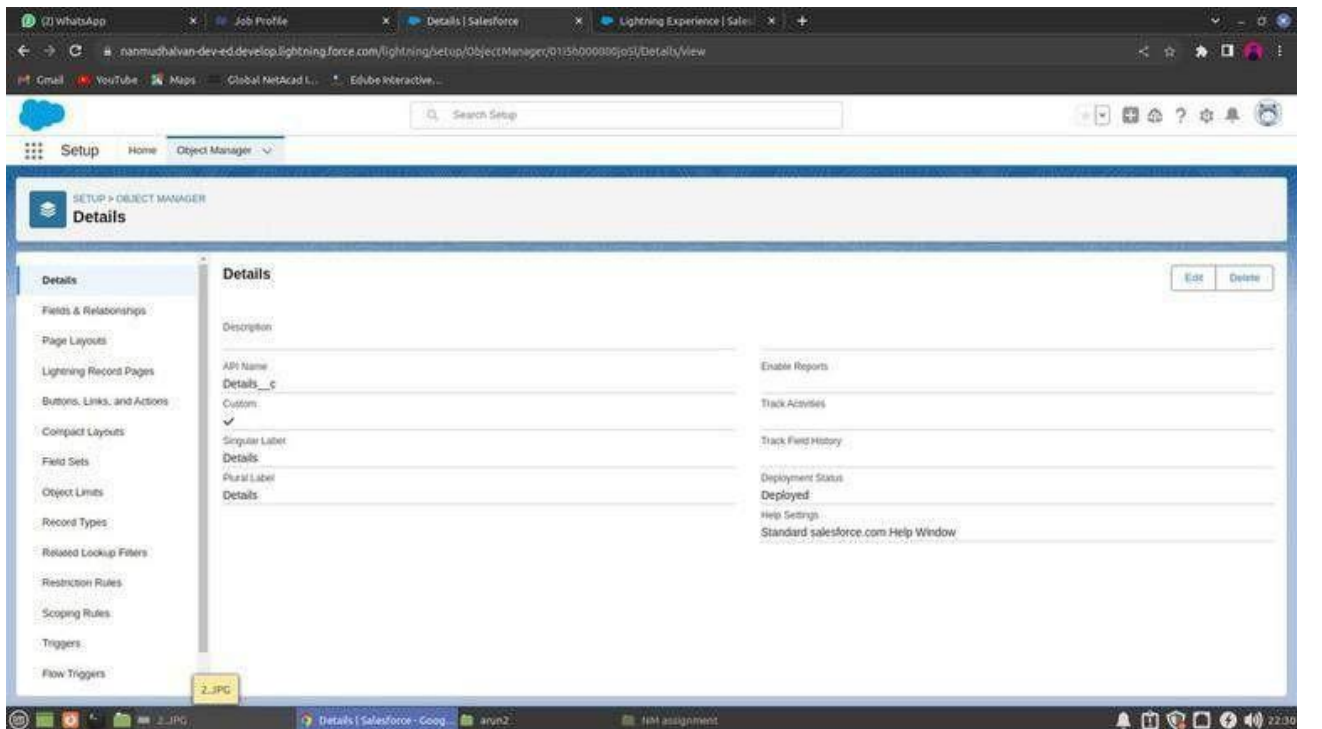
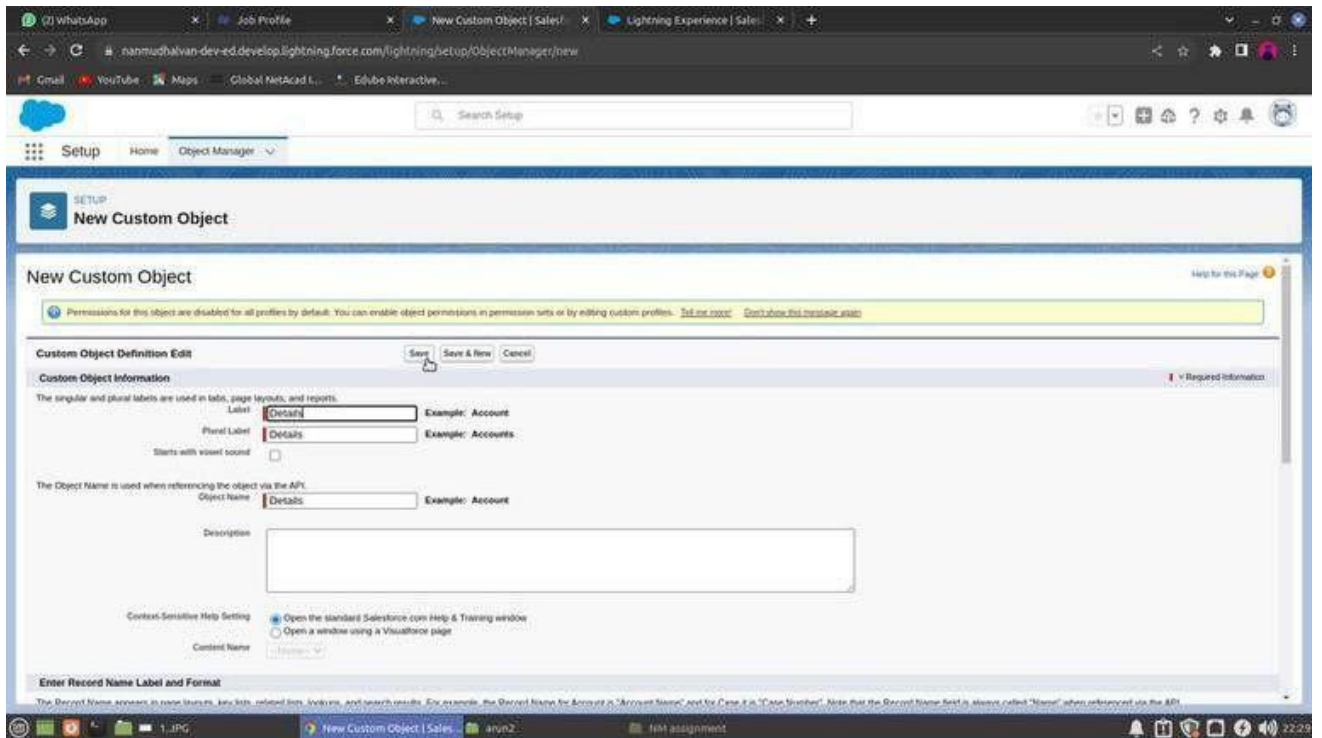
Owner

 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

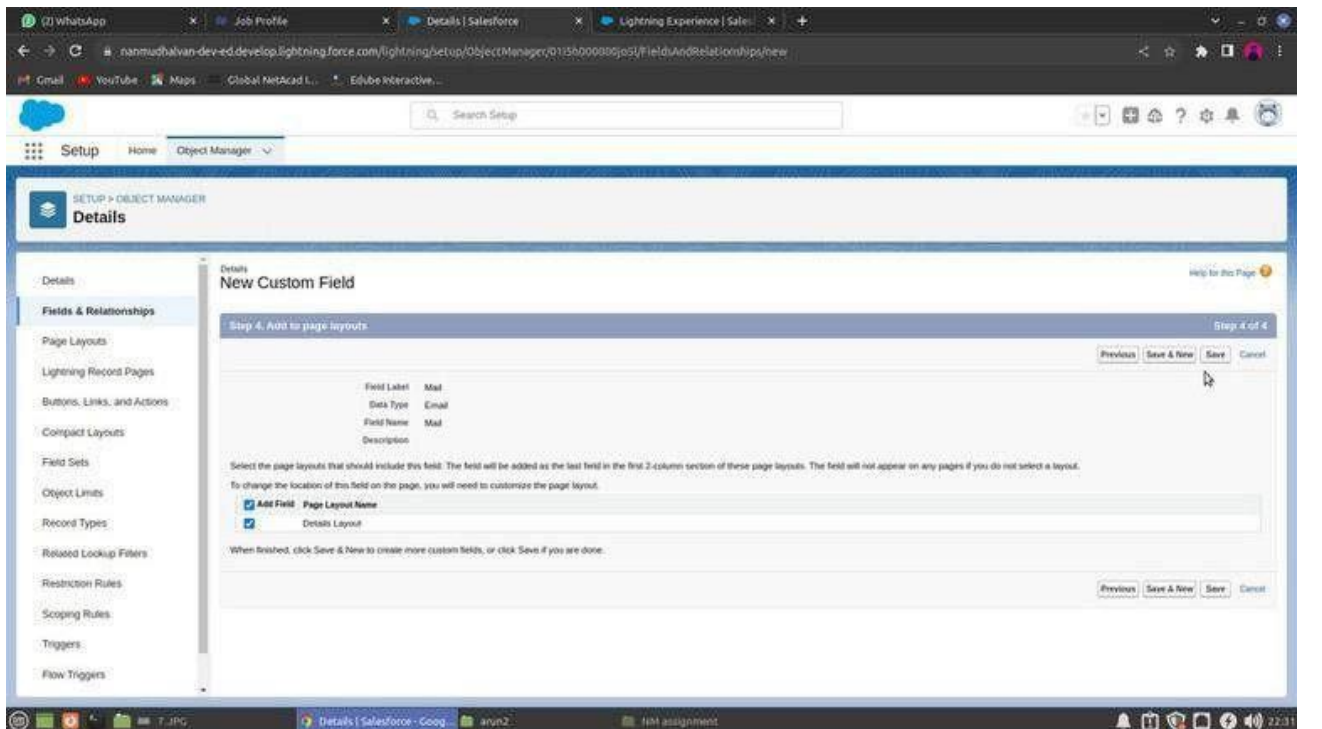
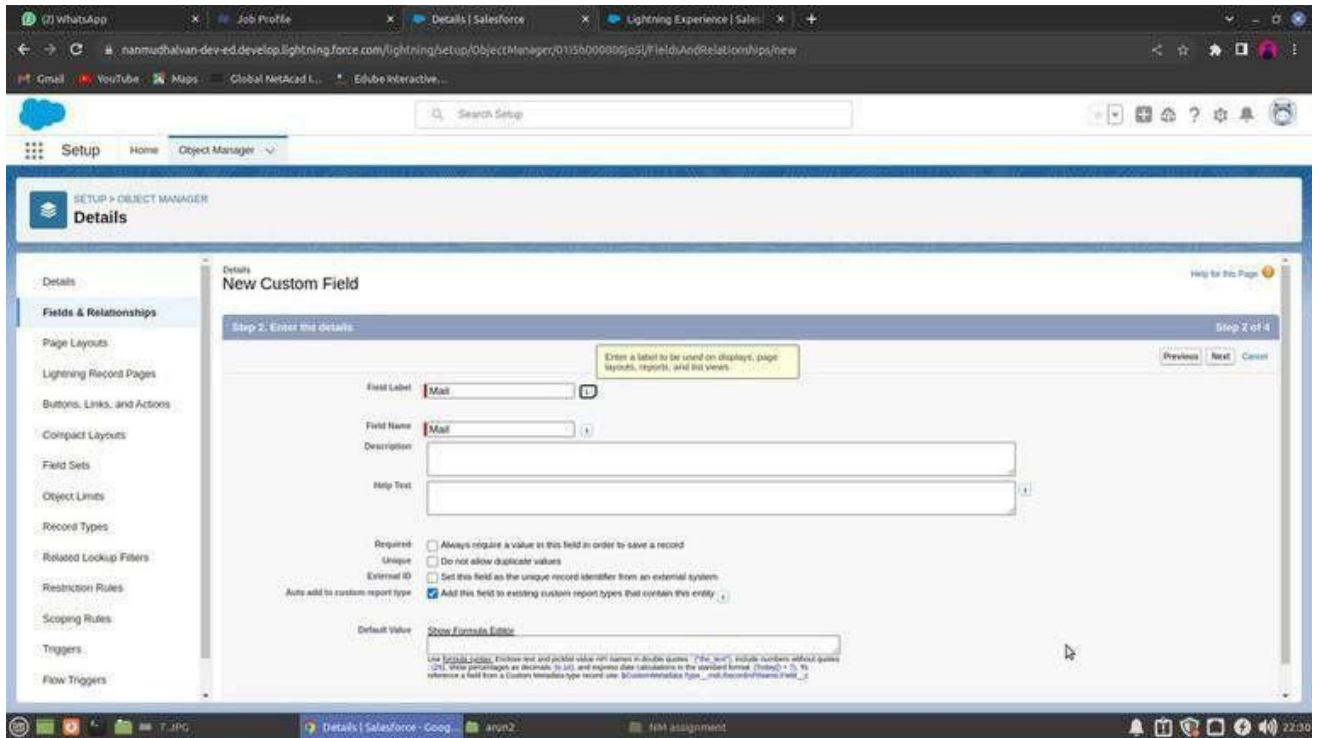
Fields & Relationships

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.
- ☐ Date/Time  
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.
- ☒ 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 contact's email address card view for mass emails.
- ☐ Geolocation  
Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distances.
- ☐ 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
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- Buttons, Links, and Actions
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- Triggers
- Flow Triggers

- ☐ Currency
- ☐ Date
- ☐ DateTime
- ☐ Email
- ☐ Geolocation
- ☐ Number
- ☐ Percent
- ☒ Phone
- ☐ Picklist
- ☐ Picklist (Multi-Select)
- ☐ Text
- ☐ Text Area
- ☐ Text Area (Long)
- ☐ Text Area (Rich)
- ☐ Text (Encrypted) (1)
- ☐ 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 DateTime 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

### New Custom Field

Step 2 of 4

Step 2: Enter the 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

Field Label:

Field Name:

Description:

Help Text:

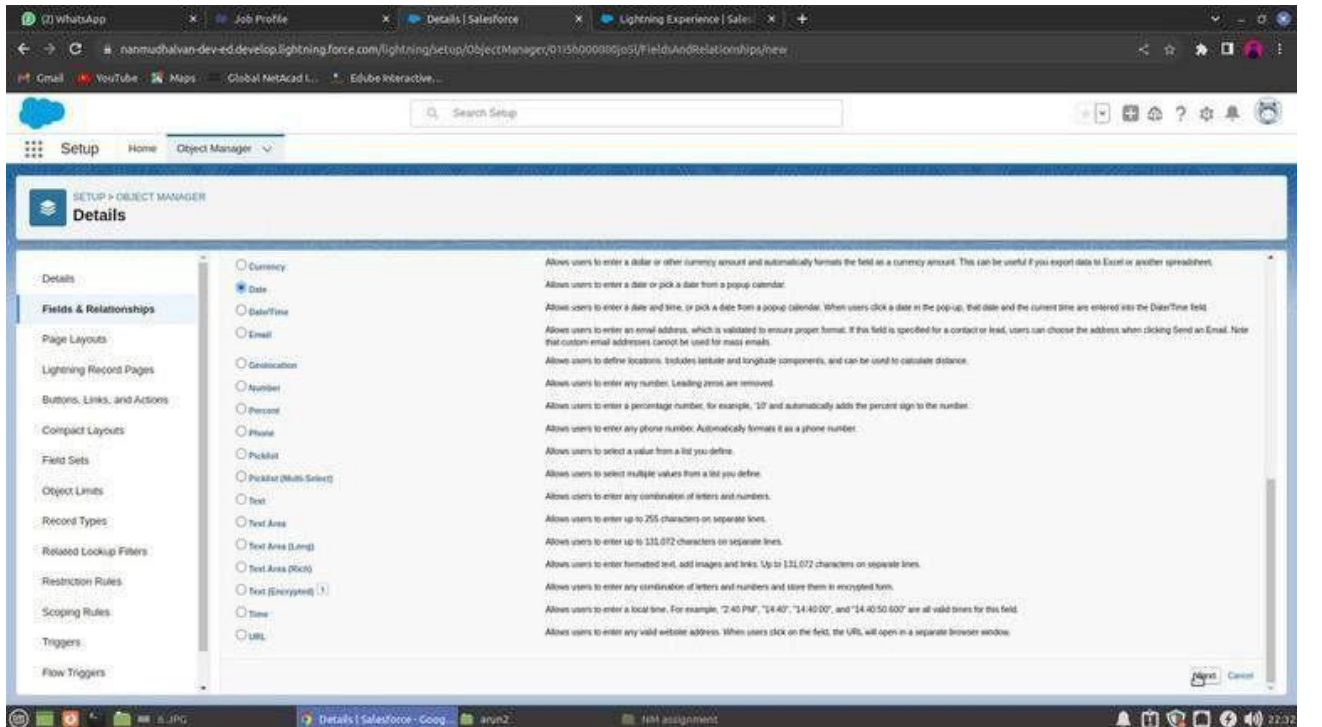
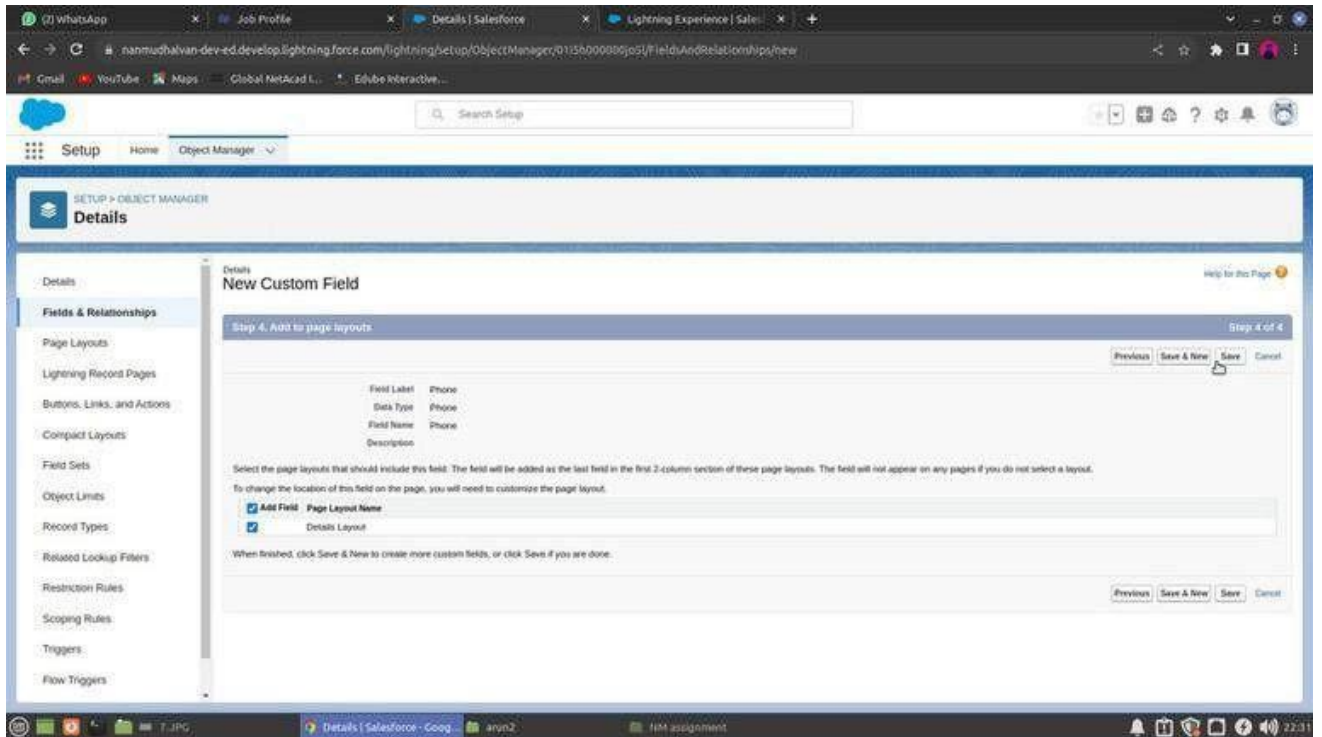
Required: ☐ Always require a value in this field in order to save a record

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

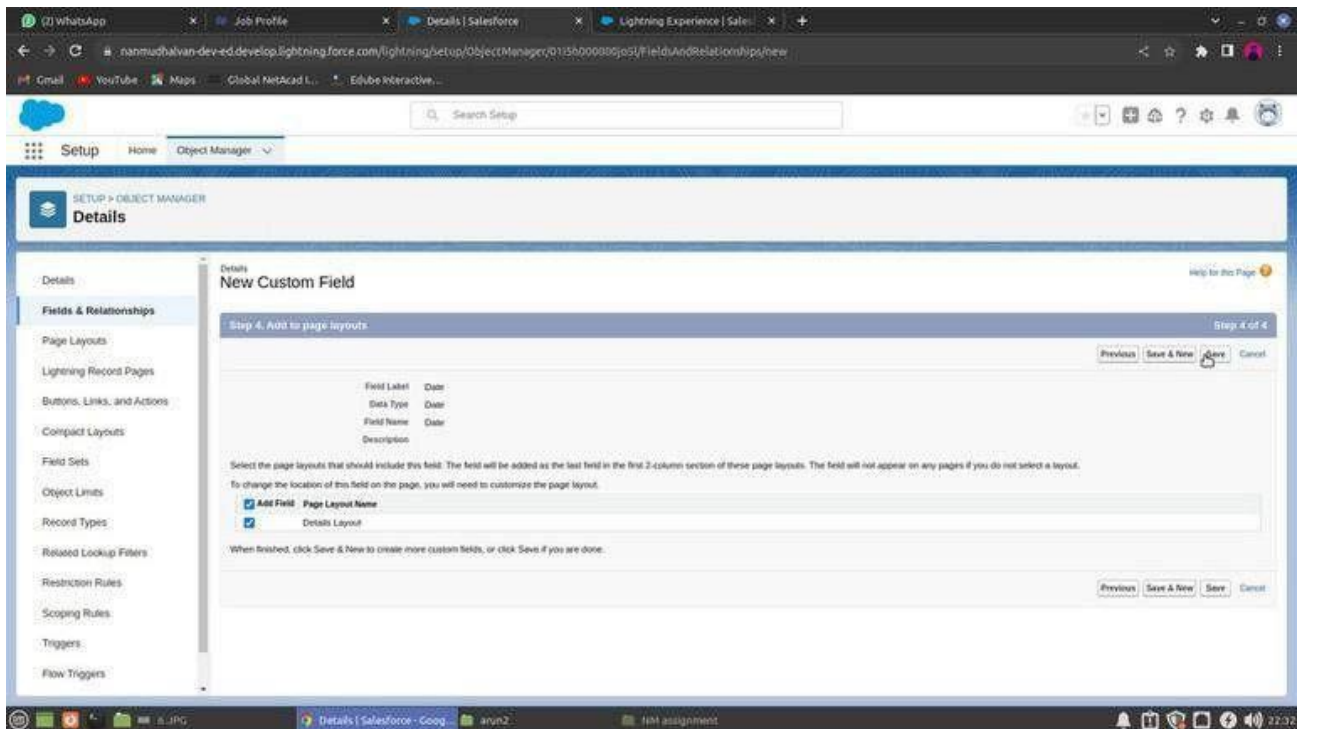
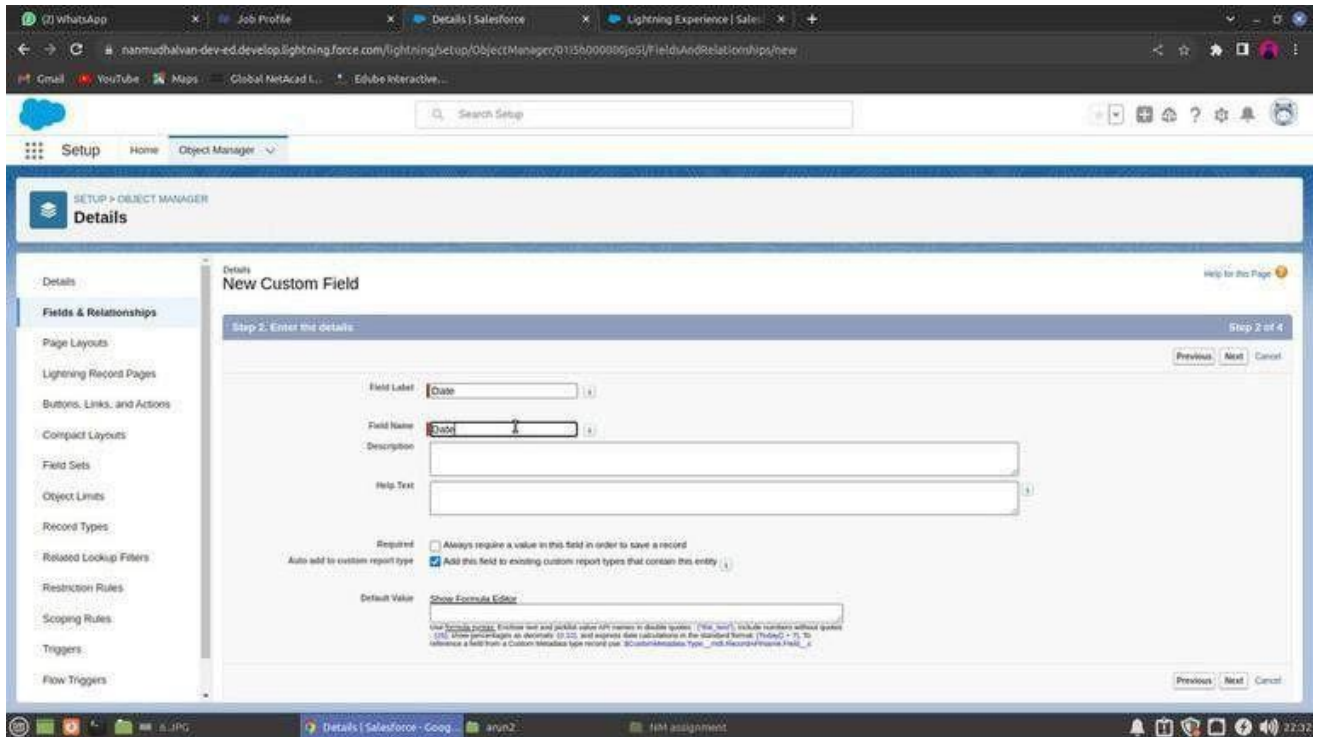
Default Value:

Use formulas to create, combine, and picklist values. Picklist values are double quoted (""). Text values are single quoted (''). Values are stored without spaces. (1) Enter percentages as decimals (0.12). And separate date calculations in the standard format: (Time) > 75. To reference a field from a Custom Database type record use: \$CustomDatabaseType\_\_rmb.RecordId\_\_c

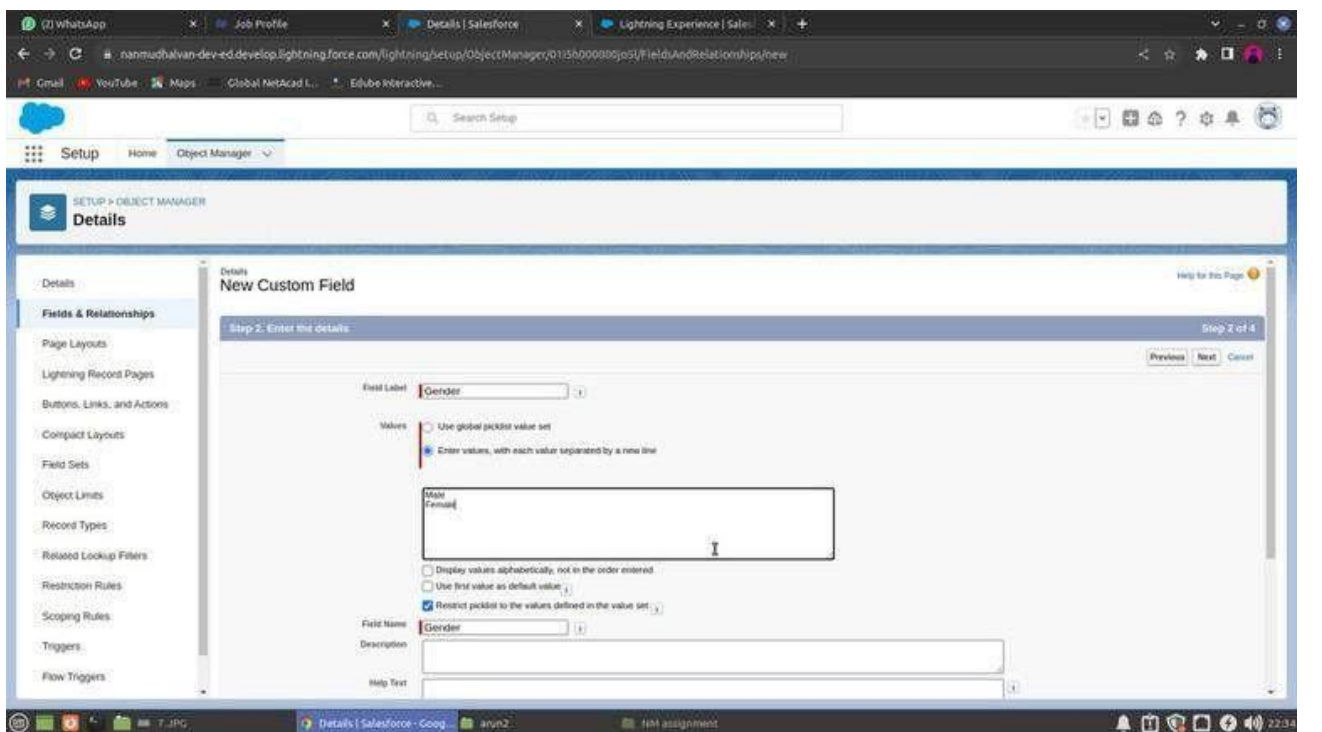
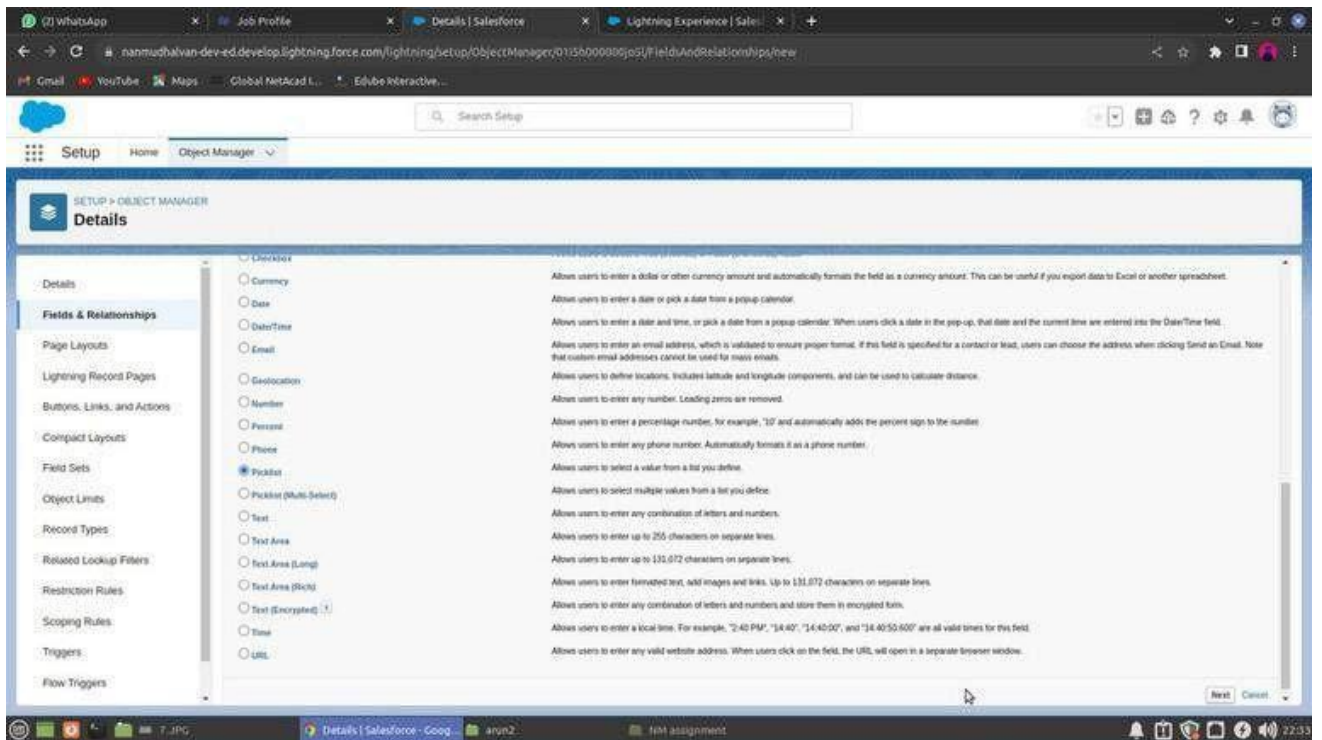
Previous Next Cancel











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

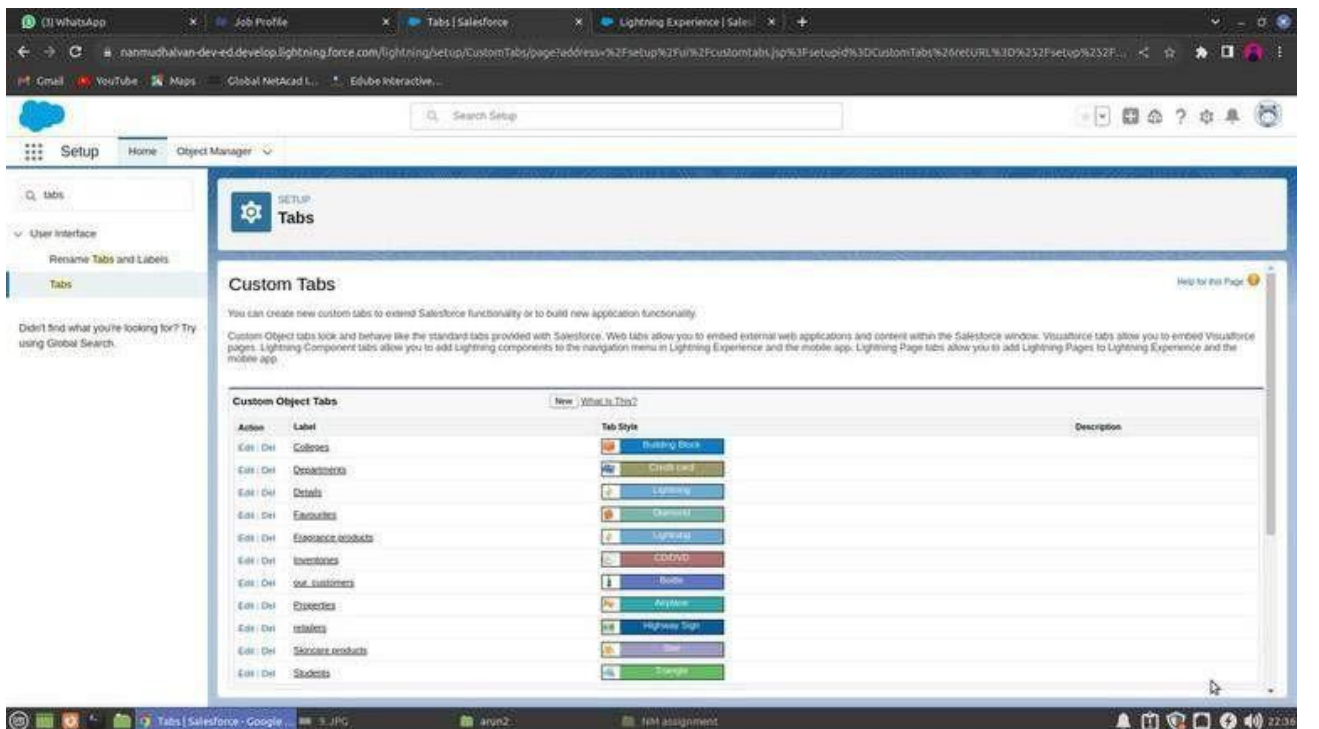
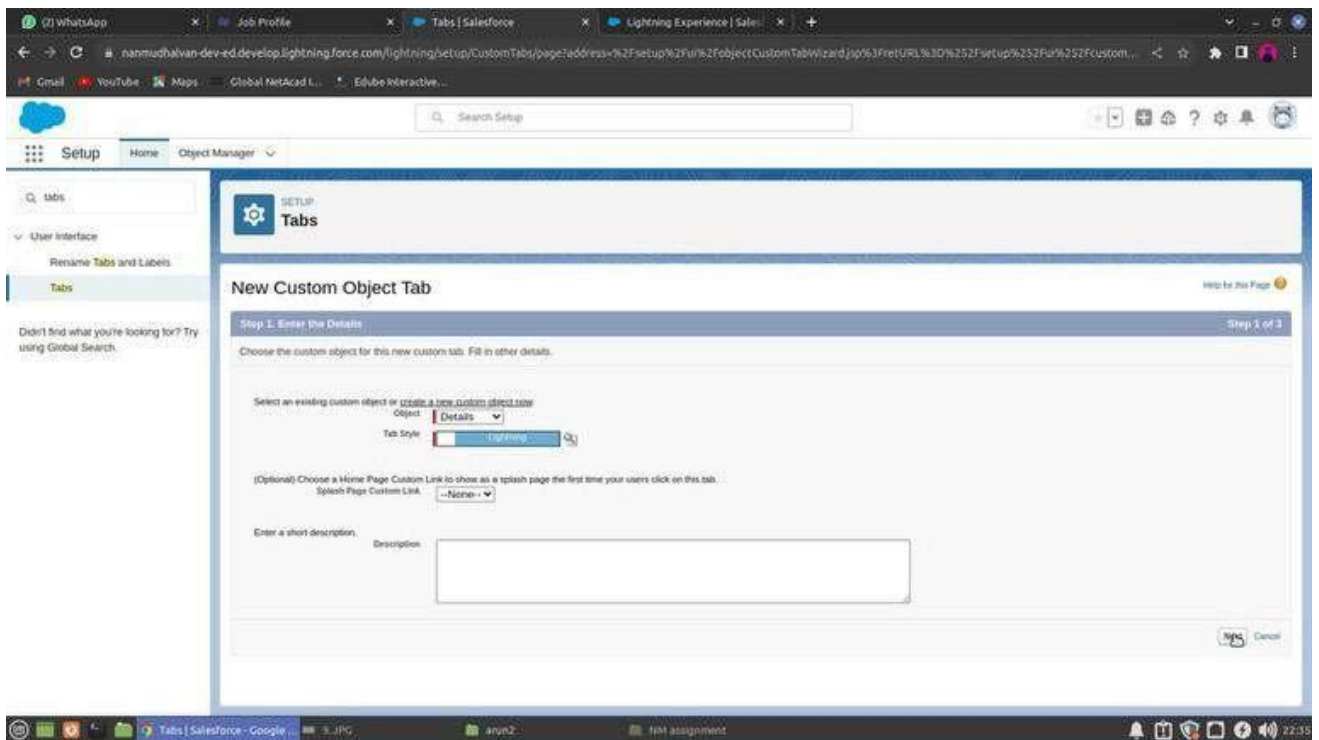
Details

**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

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.

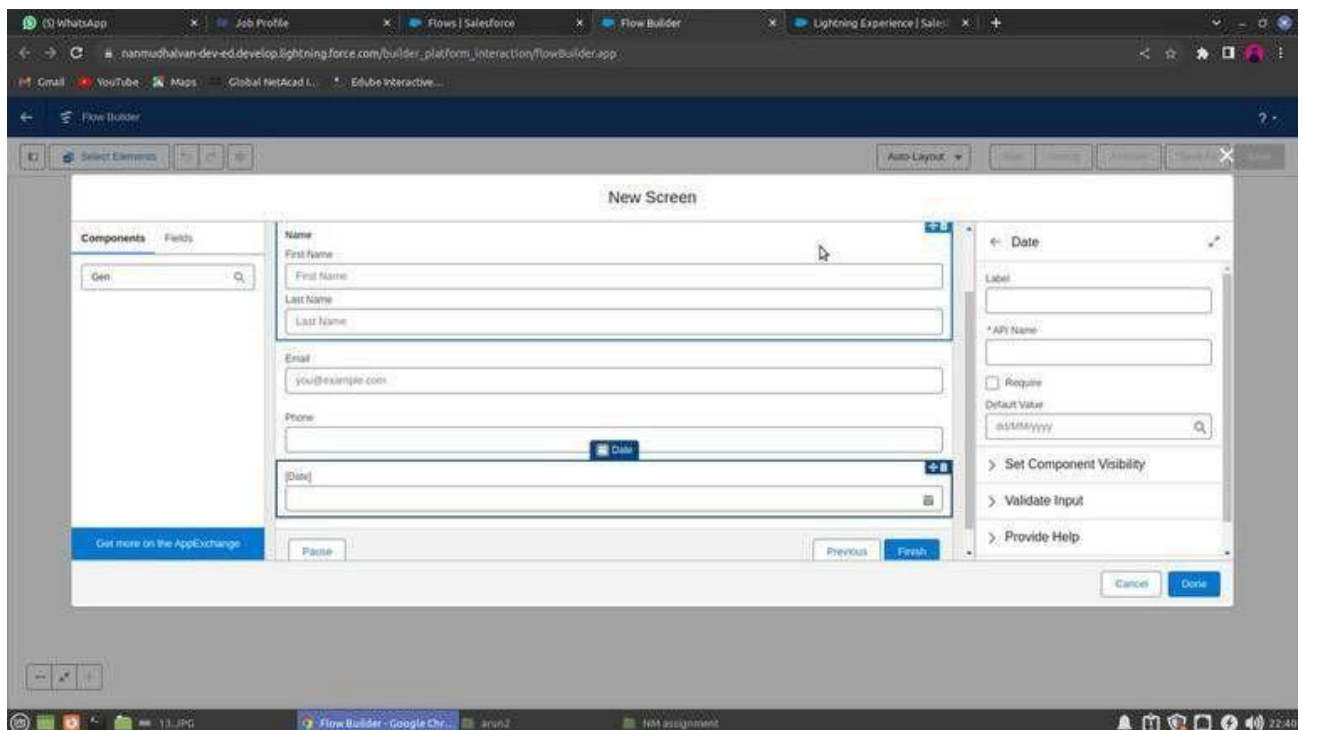
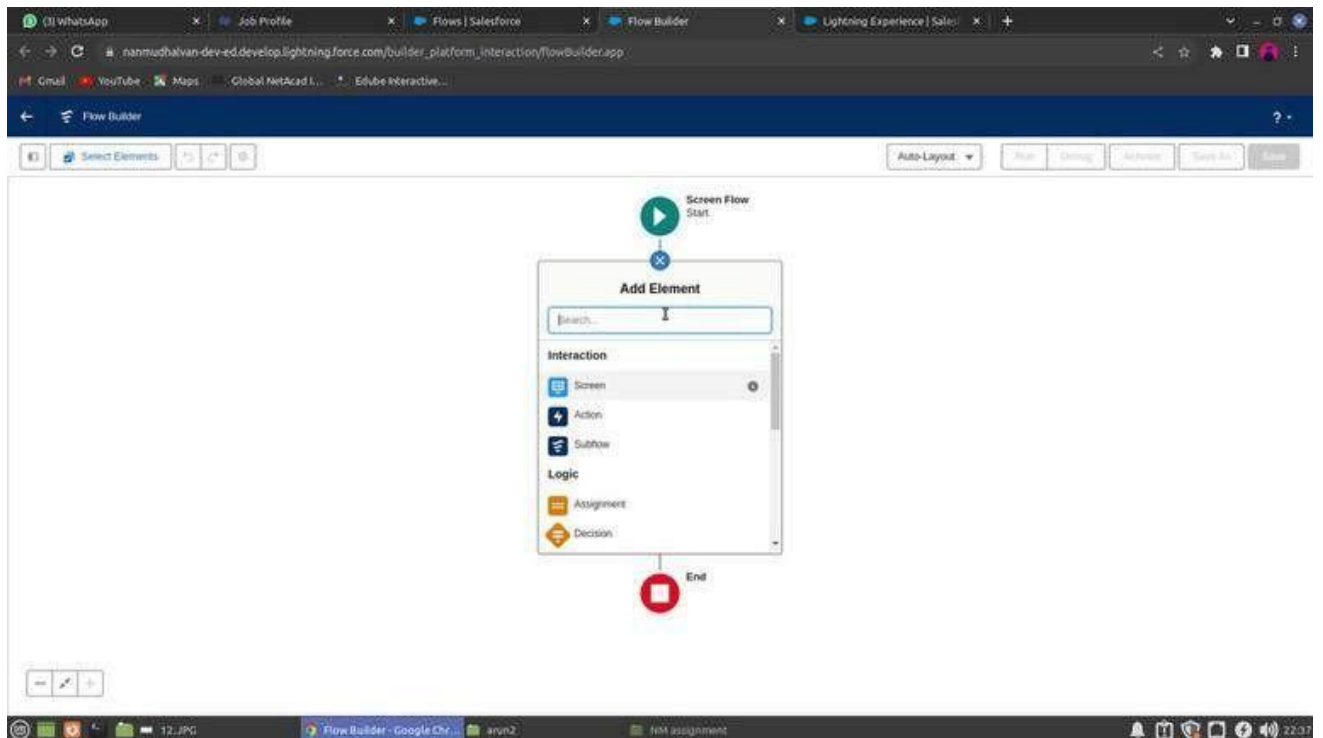
**Autolaunched Flow (No Trigger)**  
Launches when invoked by Apex, processes, REST API, and more. This autolaunched flow runs in the background.

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

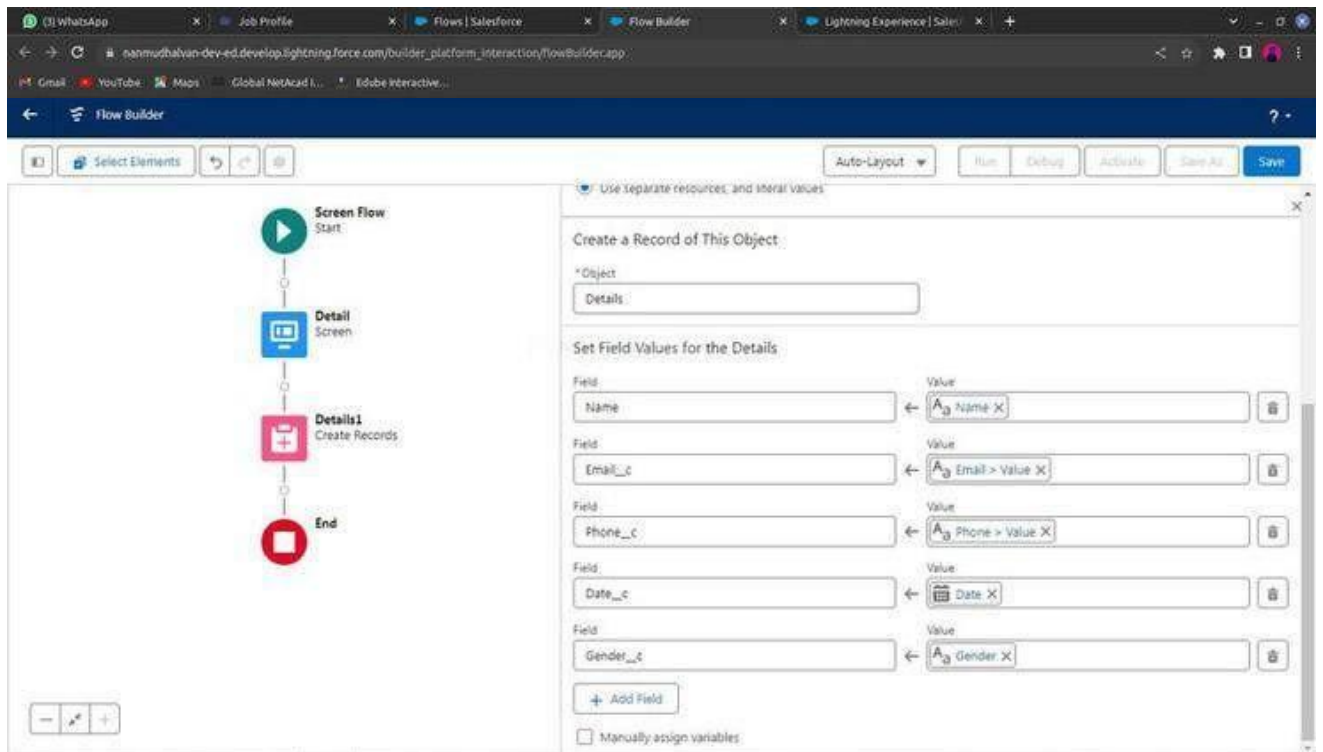
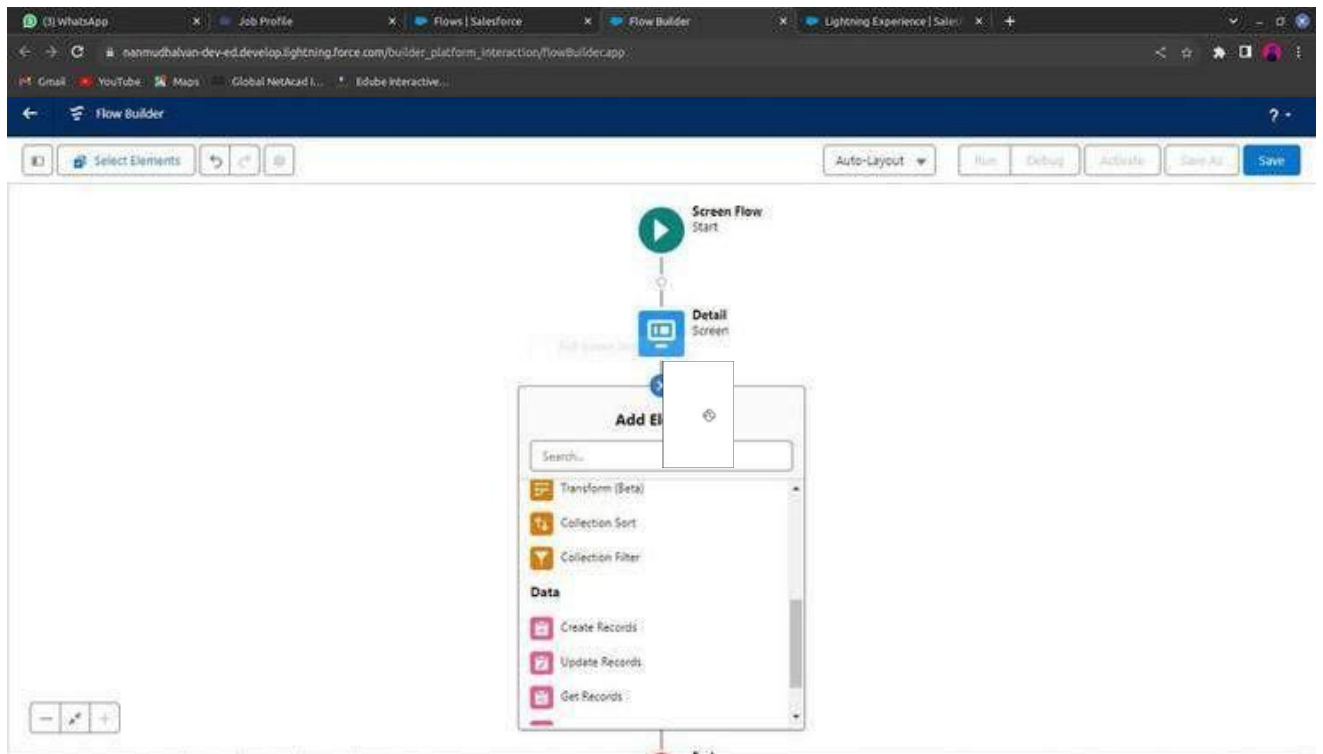
**Platform Event—Triggered Flow**  
Launches when a platform event message is received. This autolaunched flow runs in the background.

**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

Email

sathishk2003@gmail.com

Phone

6369914154


Date

22/09/2002


Gender

Male


Owner

 SATHISH KUMAR S

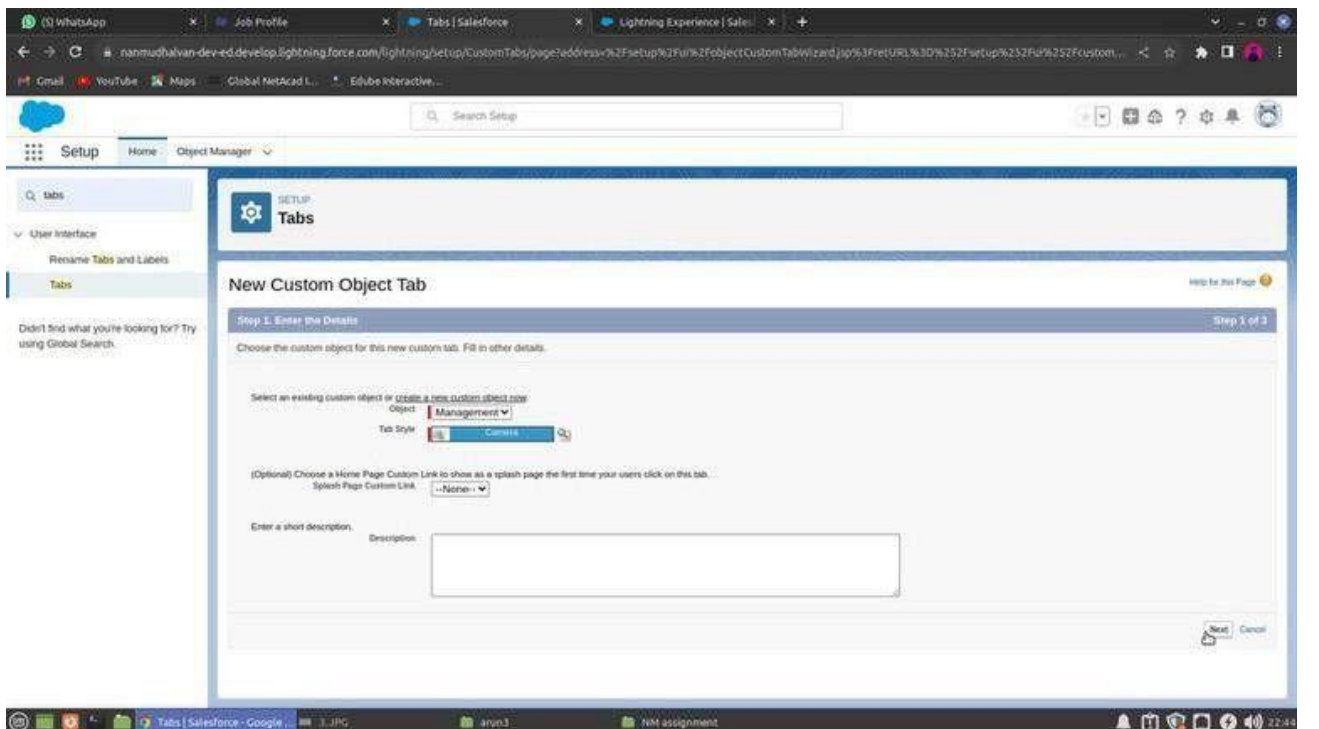
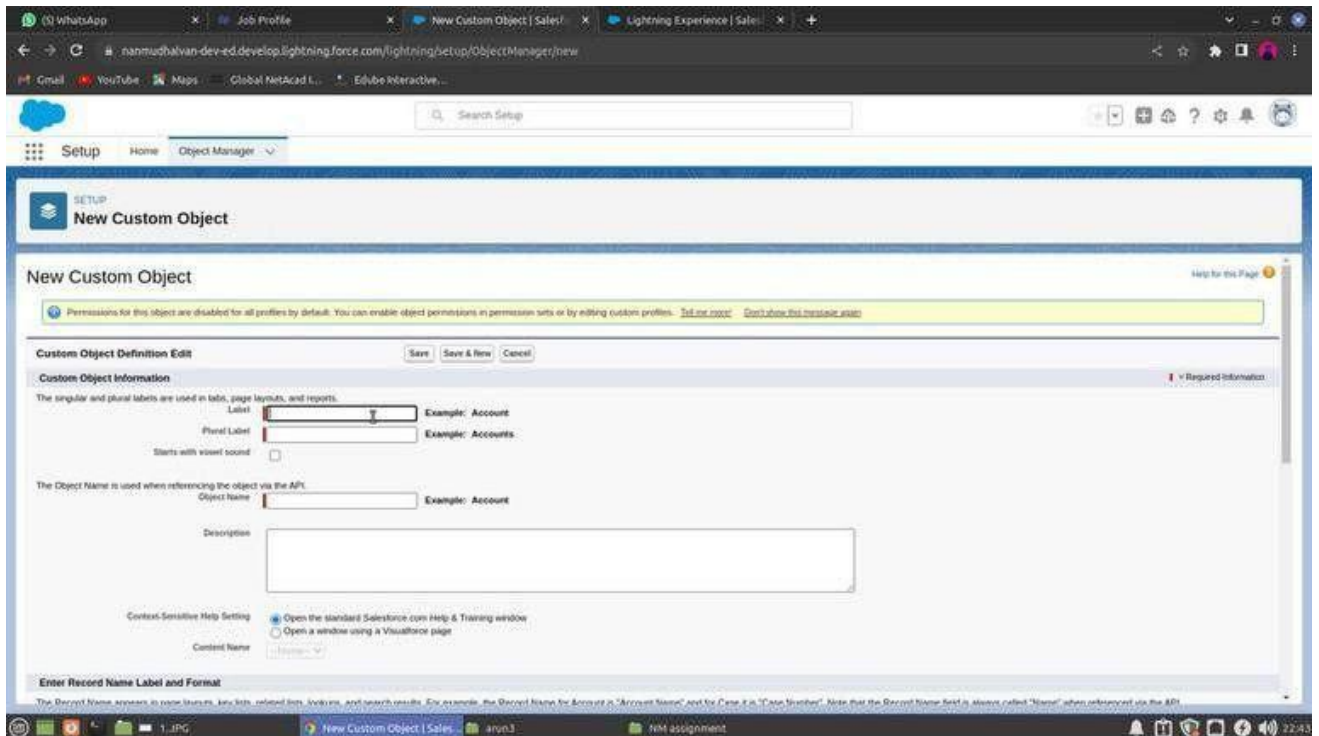
Created By

 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

Custom Object Tabs

Action	Label	Tab Style	Description
Edit / Del	Collores	Bulking Block	
Edit / Del	Departments	Credit card	
Edit / Del	Details	Lightning	
Edit / Del	Expoucties	Shannon	
Edit / Del	Expanence appuata	Lightning	
Edit / Del	Inventories	CCDVD	
Edit / Del	Managements	Camera	
Edit / Del	our customers	Route	
Edit / Del	Proventies	Aspire	
Edit / Del	retailers	Highway sign	
Edit / Del	Sekouce products	Ball	
Edit / Del	Students	Stranger	

Web Tabs

No Web Tabs have been defined

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

Management

Recently Viewed

0 items • Updated a few seconds ago

Management Name

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

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

Address bar: nanmudhalvan-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](#)

Setup Home Object Manager

Search Setup: 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

[Add Screen Help](#)

[Help for this Page](#)

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

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

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Setup Home Object Manager

Search Setup: Search Setup

Hyperforce Assistant

Users

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Prospector Preferences

Prospector Users

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Marketing

Lead Processes

Sales

Products

Asset Settings

### SETUP Profiles

[Add Screen Help](#)

[Help for this Page](#)

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 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

Global	Global Layout (View Assignment)	Object Milestone	Object Milestone Layout (View Assignment)
Email Application	Not Assigned (View Assignment)	Operating Hours	Operating Hours Layout (View Assignment)
Home Page Layout	Home Page Default	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
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- 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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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

Permission Sets

Feature Settings

Digital Experiences

Settings

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: nanmudabalan-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

Feature Settings

Digital Experiences

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

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

### Select an Expiration Option For Assigned Users

☒ No expiration date  
☐ Specify the expiration 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

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

### manager12

Current Assignments

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

Add Assignment

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 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: (3) 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)

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

Section: SETUP > OBJECT MANAGER Customer

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

Sub-Process Step: Specify the type of information that the custom field will contain.

Data Type:

- ☐ None Selected
- ☐ Auto Number
- ☐ Formula
- ☐ Roll-Up Summary
- ☐ Lookup Relationship
- ☒ Master-Detail Relationship
- ☐ External Lookup Relationship

Next Cancel

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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

Section: SETUP > OBJECT MANAGER Customer

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

Sub-Process Step: 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

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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 File 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	Standard Platform User	Custom Profile	<input type="checkbox"/>
User License	Salesforce Platform		
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	Global Layout <a href="#">View Assignment</a>	Object Milestone	Object Milestone Layout <a href="#">View Assignment</a>
Email Application	Not Assigned	<a href="#">View Assignment</a>	Operating Hours	Operating Hours Layout <a href="#">View Assignment</a>
Home Page Layout	Home Page Default <a href="#">View Assignment</a>		Order	Order Layout <a href="#">View Assignment</a>

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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](#)

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### SETUP Profiles

Profile Edit Management

Set the permissions and page layouts for this profile.

Profile Edit

Name: Management

User License: Salesforce Platform

Description:

Custom Profile: ☒

Save Save & New Cancel

#### 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

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### SETUP Profiles

Contact Point Consents

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

Streaming Channels

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

User External Credentials

	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--	--------------------------	--------------------------	--------------------------	--------------------------	--------------------------

#### 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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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

Help for this Page

User Edit Save Save & New Cancel

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: ☐

Required Information

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Search Setup

Setup Home Object Manager

Search: prof

Users

Profiles

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

### SETUP Profiles

#### Profile Edit

Help for this Page

### Sales Manager

Set the permissions and page layouts for this profile.

Profile Edit Save Save & New Cancel

Name: Sales Manager  
User License: Salesforce Platform  
Custom Profile: ☒  
Description:

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

Service Provider Access

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

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Search Setup

Setup | Home | Object Manager

Search: prof

Users | 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

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Search Setup

Setup | Home | Object Manager

Search: 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.co

Username: managersales.123@gmail.co

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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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

## 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 checked="" 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

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