

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

Name: Moorthi.P

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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

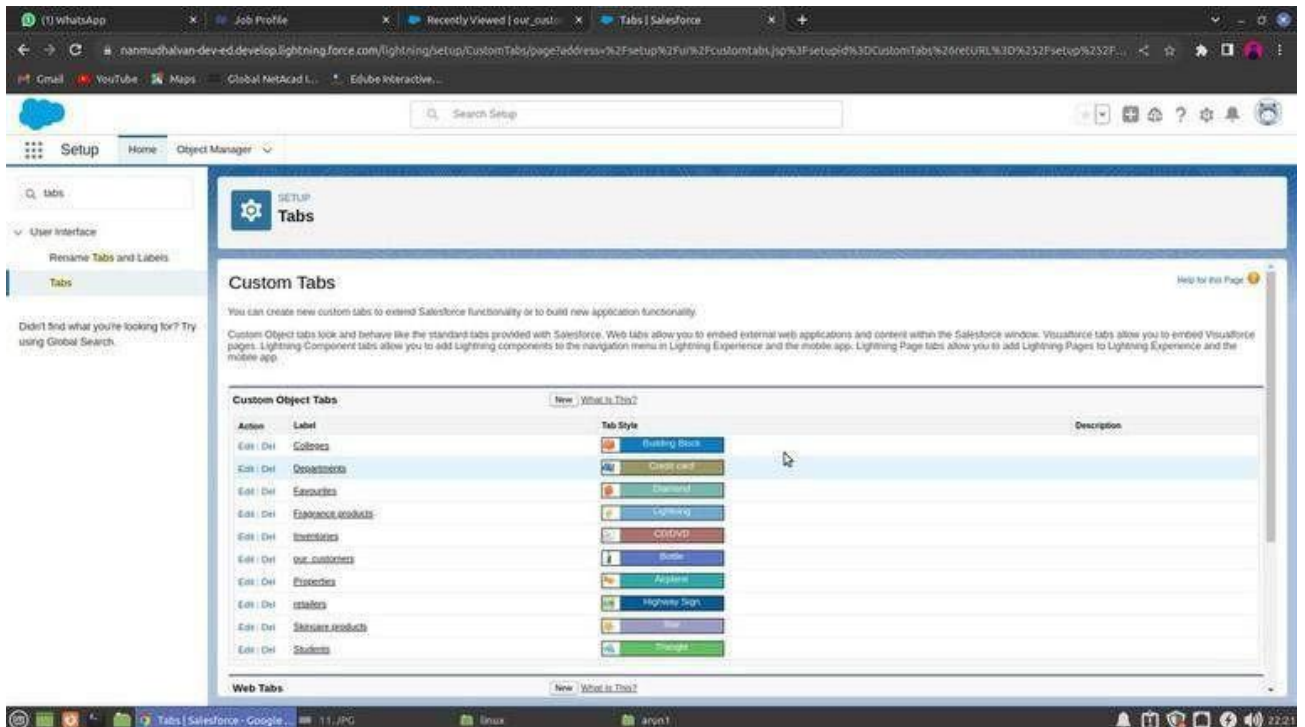
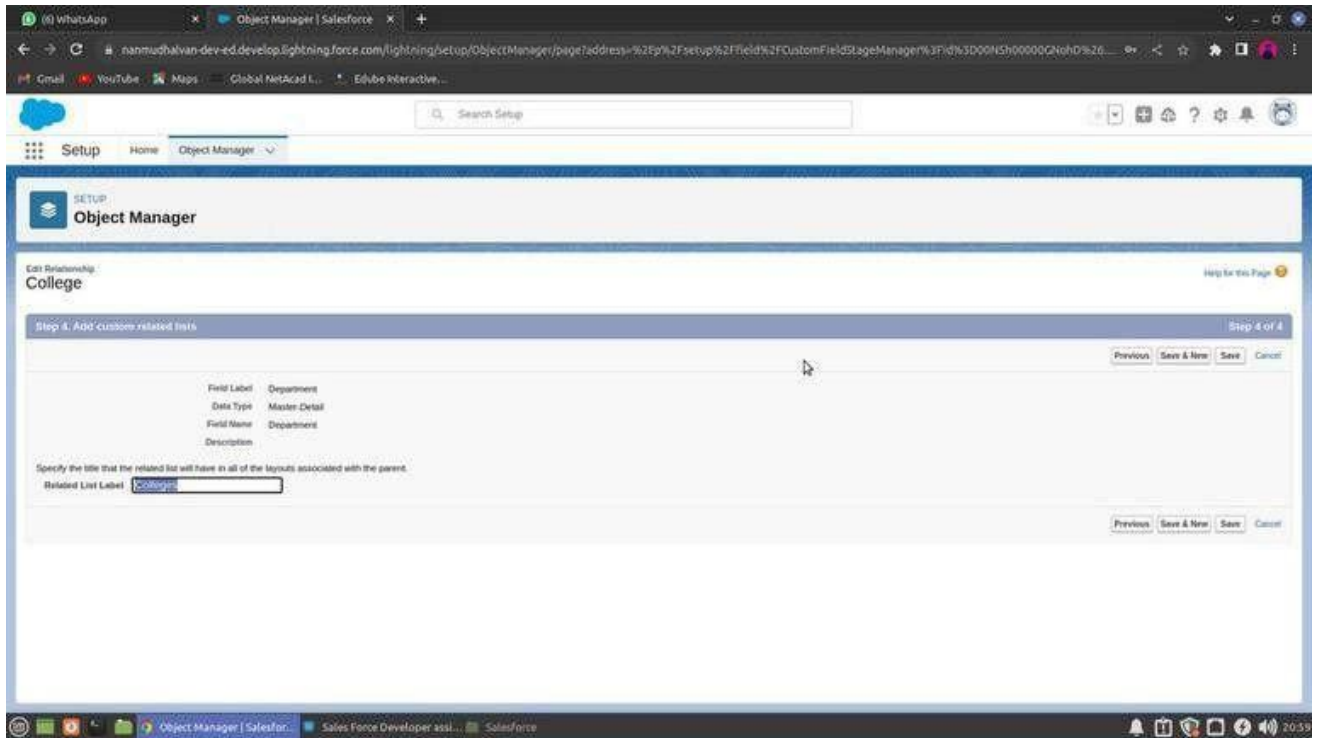
Content Name

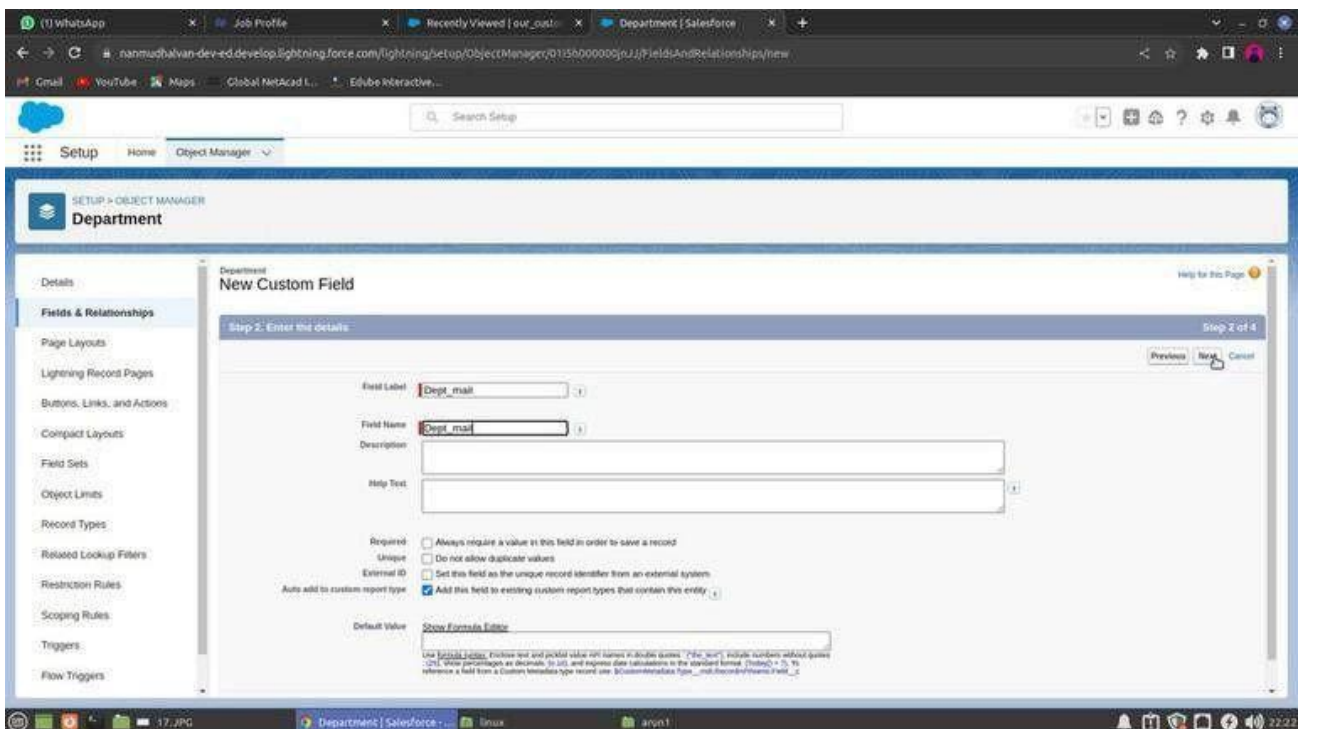
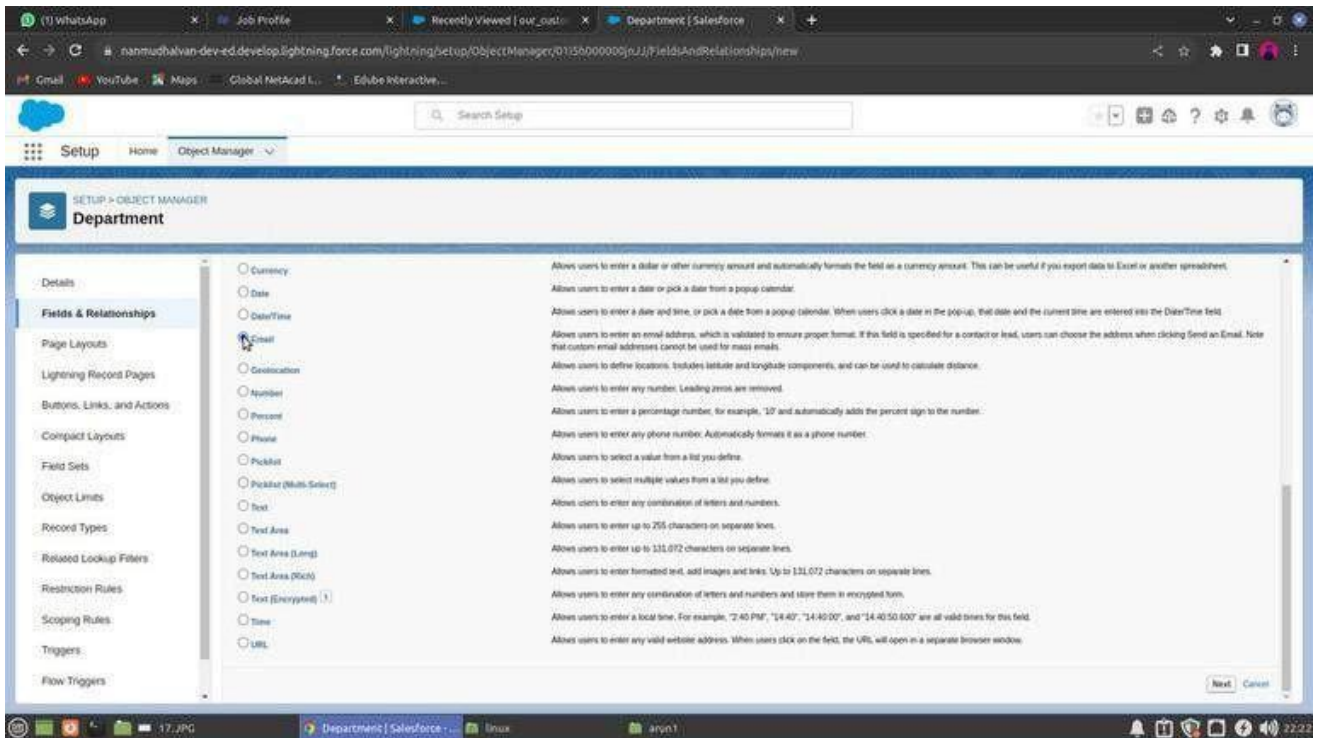
Enter Record Name Label and Format

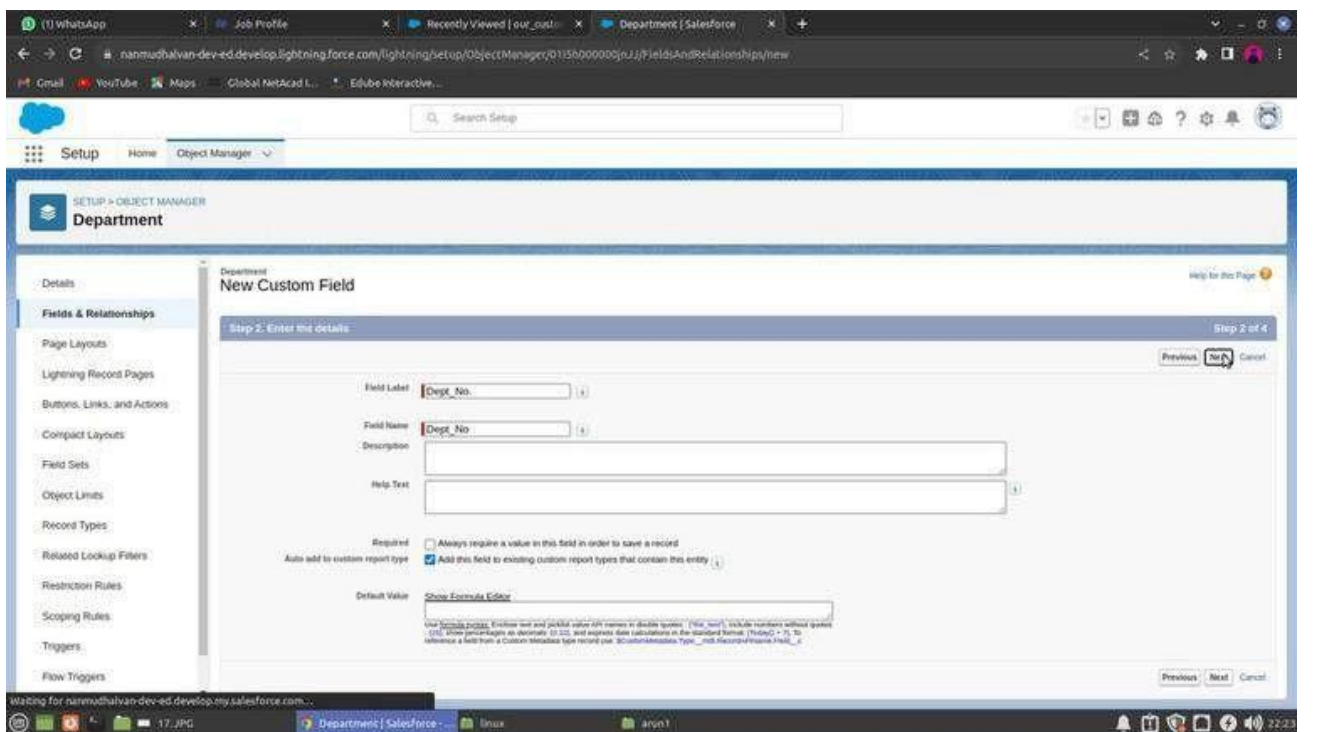
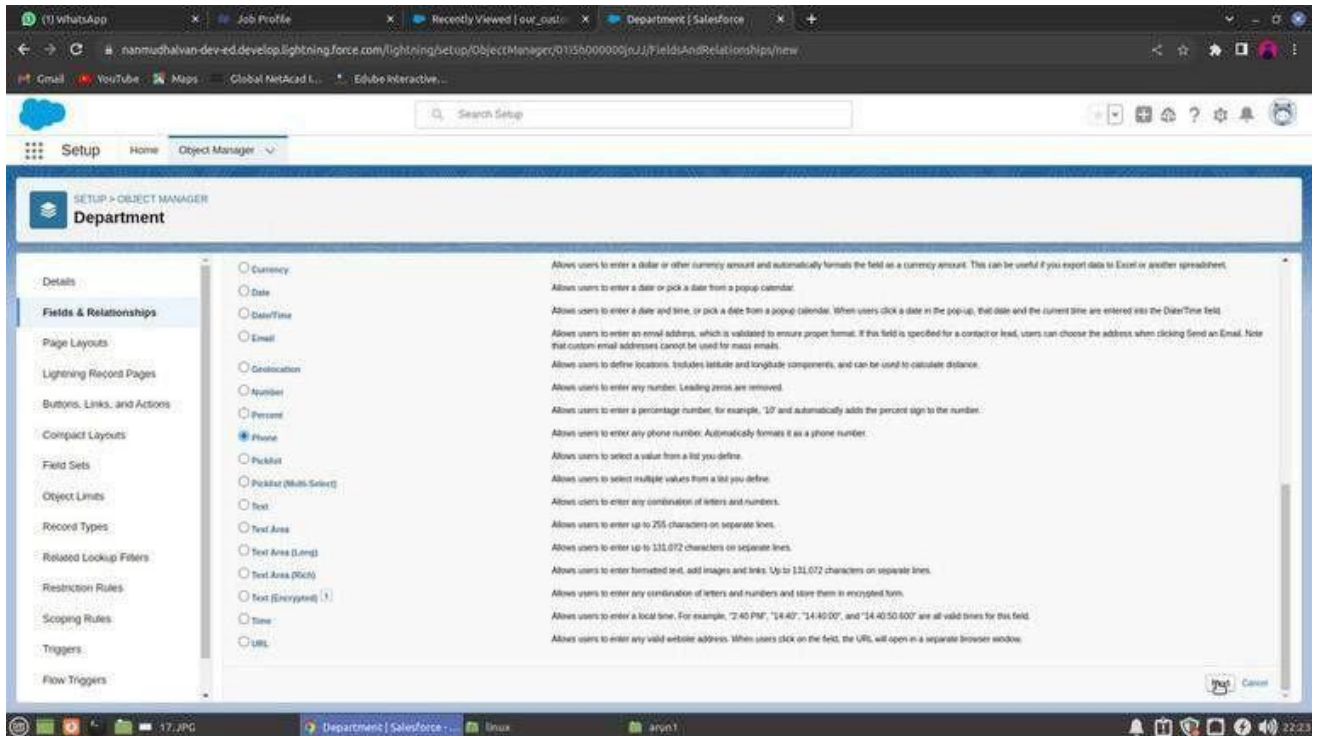
The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

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) |                   |         |

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

SETUP > 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

SETUP > 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

**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
- ☐ Date

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 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>

Search Setup

Apps

Users

Groups

Roles

App Launcher

App Manager

App Settings

App Security

App Analytics

App Logs

App Help

## 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 <sup>?</sup>

Name your app...

\*Developer Name <sup>?</sup>

Enter a developer name...

Description <sup>?</sup>

Enter a description...

#### App Branding

Image <sup>?</sup>

Upload

Primary Color Hex Value <sup>?</sup>

Primary Color Hex Value

#007002

Org Theme Options

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

#### App Launcher Preview

Next

|    |                  |                 |   |                     |           |   |
|----|------------------|-----------------|---|---------------------|-----------|---|
| 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 | ✓ |

Search Setup

Apps

Users

Groups

Roles

App Launcher

App Manager

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App Help

## 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 <sup>?</sup>

My\_College

\*Developer Name <sup>?</sup>

My\_College

Description <sup>?</sup>

Enter a description...

#### App Branding

Image <sup>?</sup>

Upload

Primary Color Hex Value <sup>?</sup>

Primary Color Hex Value

#007002

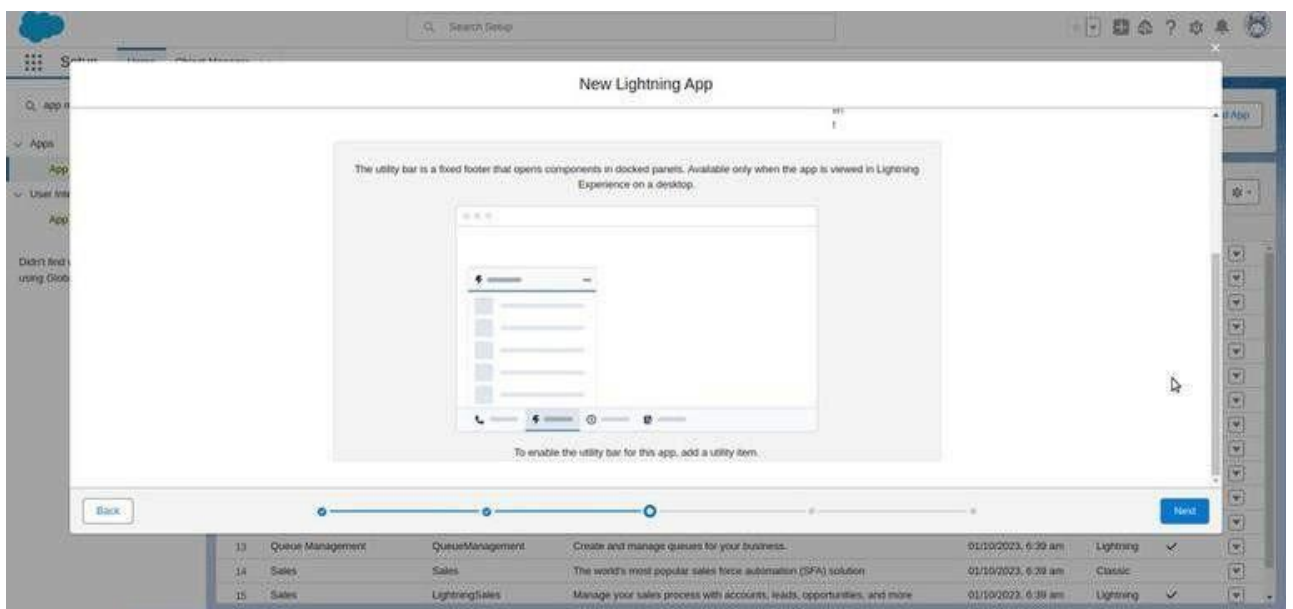
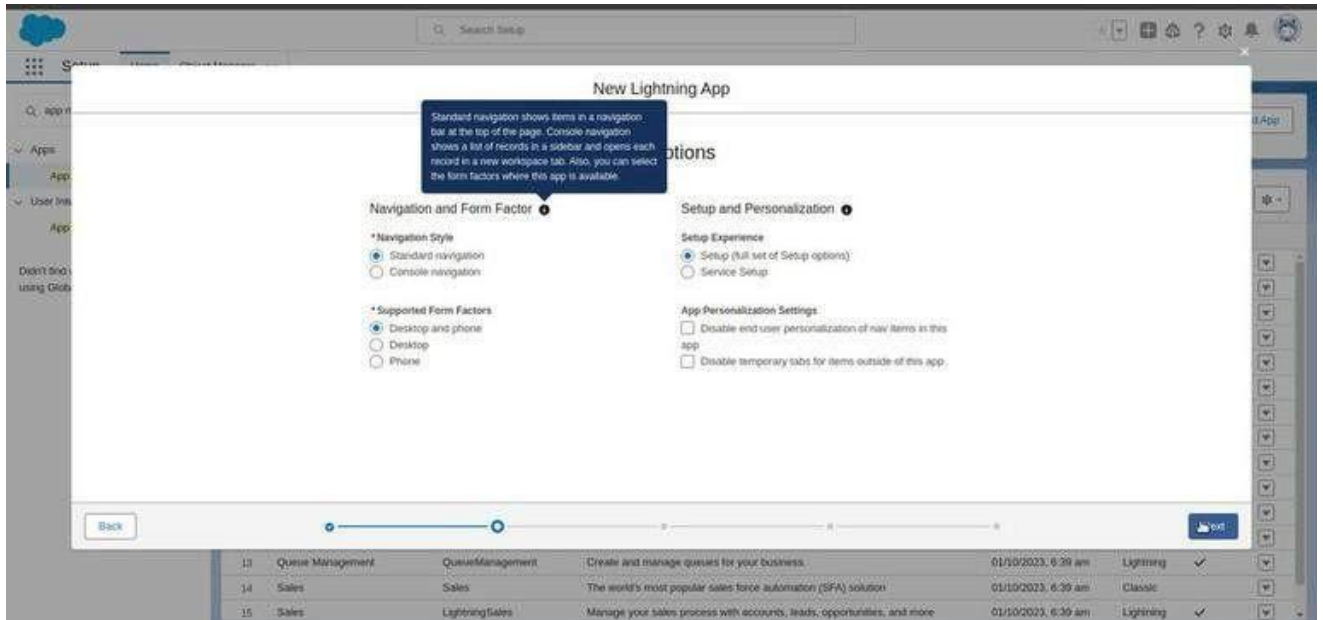
Org Theme Options

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

#### App Launcher Preview

Next

|    |                  |                 |   |                     |           |   |
|----|------------------|-----------------|---|---------------------|-----------|---|
| 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 blue accents. The 'App Details' section on the left contains three input fields: 'App Name' (My\_App), 'Developer Name' (My\_App), and 'Description' (Enter a description...). The 'App Branding' section on the right features an 'Image' upload area with a blue square icon and an 'Upload' button, and a 'Primary Color Hex Value' field set to #0070C2. Below these is the 'App Launcher Preview' showing a blue button with 'My' and a grey button with 'My\_App'. A 'Next' button is located at the bottom right. The left sidebar shows the 'Salesforce' navigation menu with options like 'Queue Management', 'Sales', and 'Lightning Sales'.

The screenshot displays the Salesforce Lightning App Builder interface. A modal window titled "New Lightning App" is open, showing two columns: "Available Features" and "Selected Features". In the "Available Features" column, a search bar contains the text "sy", and a list item "Salesforce API Only System Integrations" is visible. In the "Selected Features" column, the item "System Administrator" is listed. Below the feature lists are navigation arrows and a progress bar. At the bottom of the modal, there is a "Back" button on the left and a "Save & Finish" button on the right. The background shows the Salesforce navigation sidebar on the left and a table of existing Lightning Apps at the bottom.

|                       | ID | Label            | Description   | Created At          | Version   | Status |
|-----------------------|----|------------------|---|---------------------|-----------|--------|
| Salesforce            | 13 | Queue Management | Queue Management  | 01/10/2023, 6:39 am | Lightning | ✓      |
| Salesforce Branding   | 14 | Sales            | The world's most popular sales force automation (SFA) solution          | 01/10/2023, 6:39 am | Classic   |        |
| Salesforce Navigation | 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

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

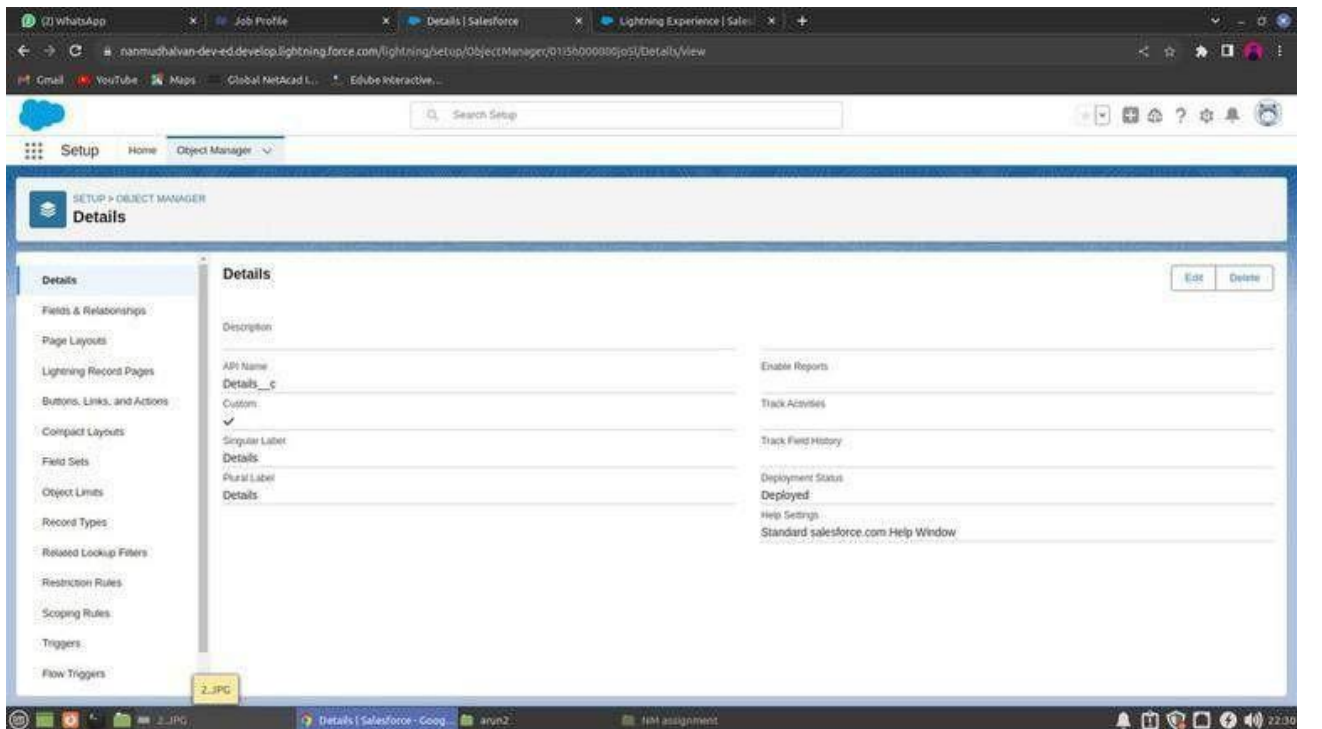
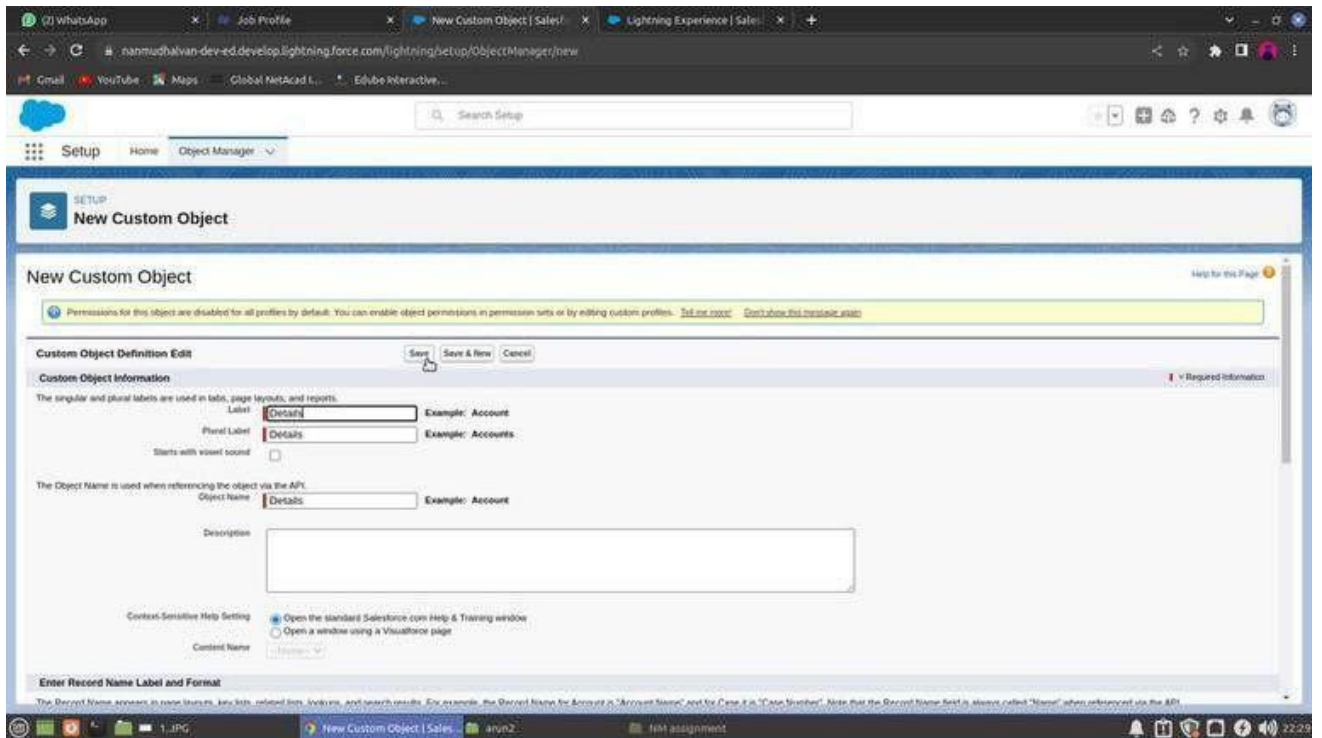
Owner

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

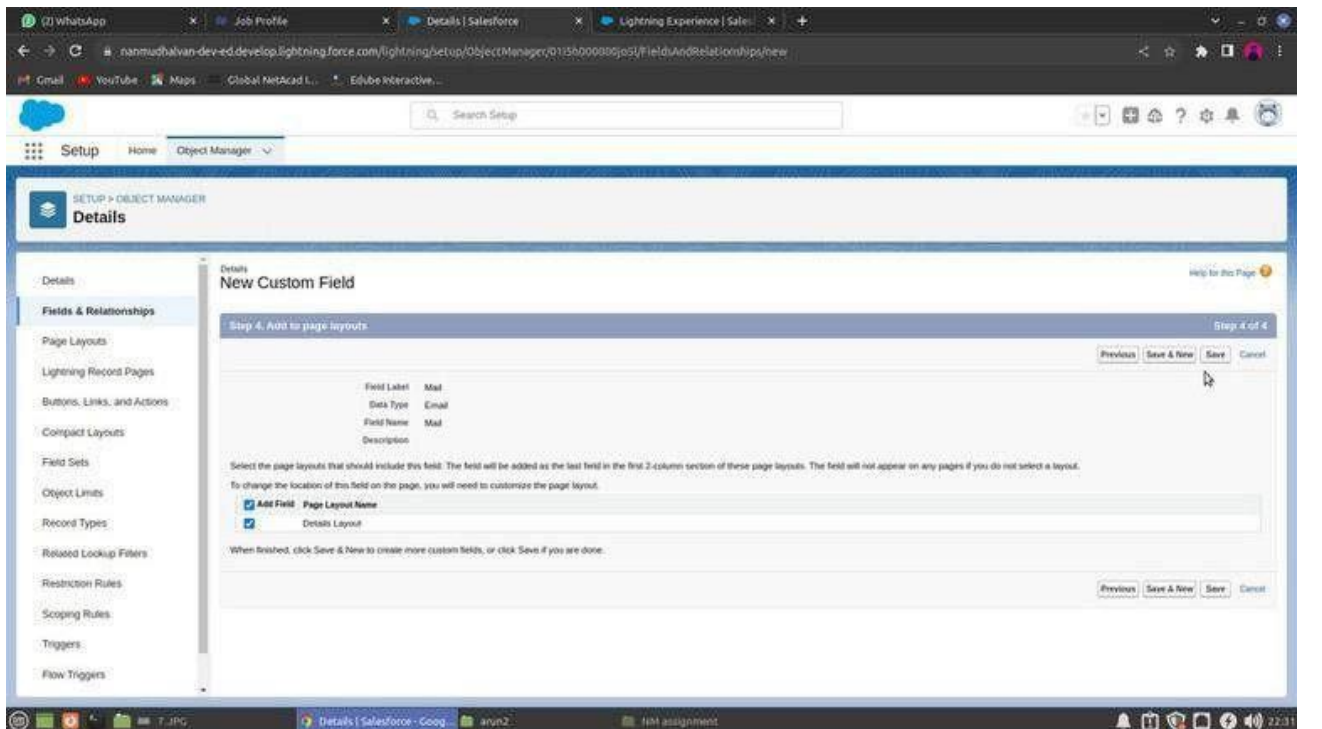
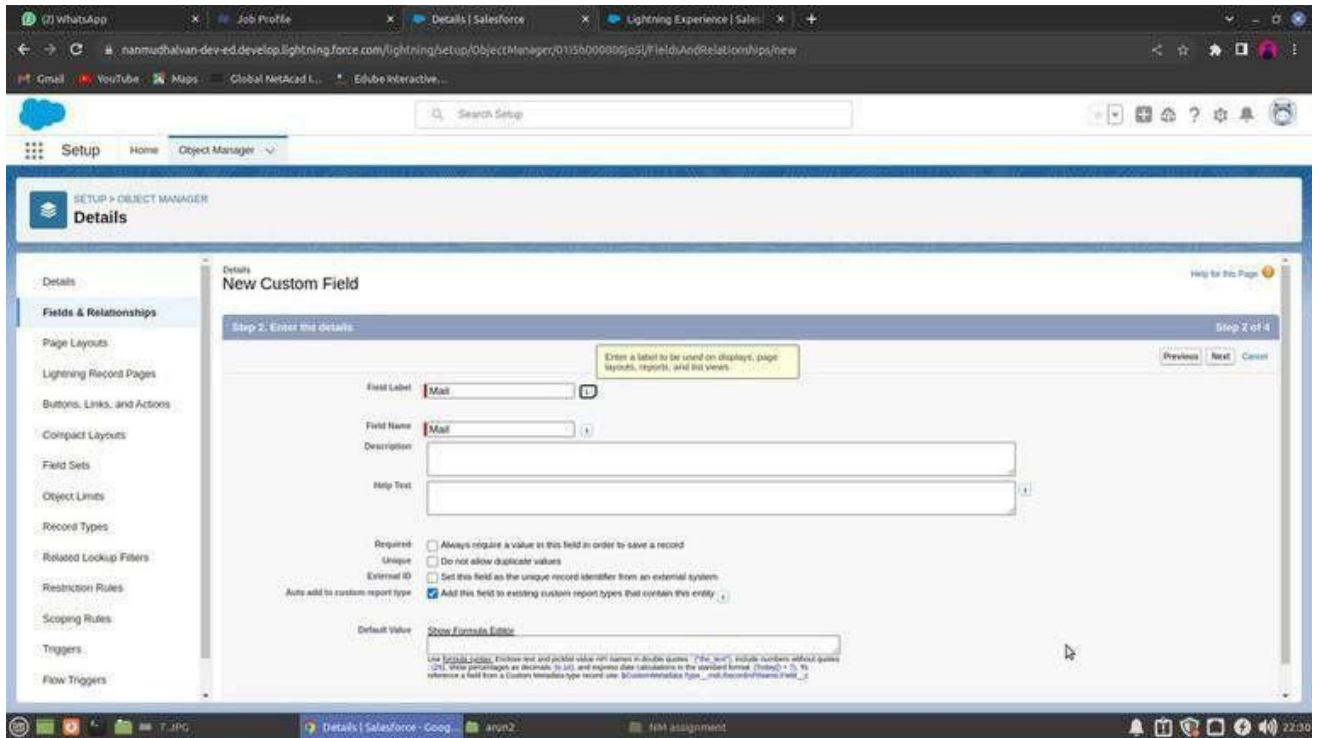
Fields & Relationships

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

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Currency

Date

Date/Time

Email

Geolocation

Number

Percent

Phone

Picklist

Picklist (Multi-Select)

Text

Text Area

Text Area (Long)

Text Area (Rich)

Text (Encrypted)

Time

URL

Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

Allows users to enter a date or pick a date from a popup calendar.

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

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

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

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

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

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

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

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

Allows users to enter any combination of letters and numbers.

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

Allows users to enter up to 131,072 characters on separate lines.

Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.

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

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

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

Next Cancel

Setup > OBJECT MANAGER

## Details

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

### New Custom Field

Step 2 of 4

Step 2: Enter the details

Field Label: Phone

Field Name: Phone

Description:

Help Text:

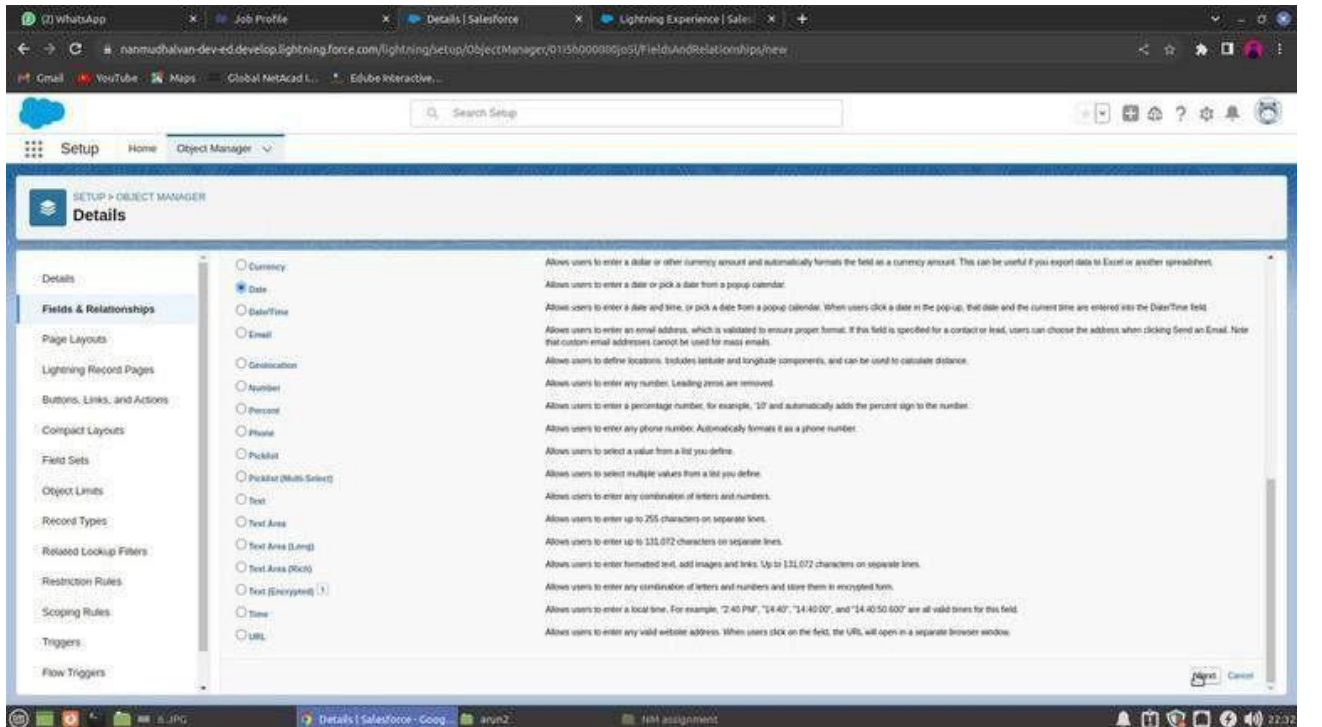
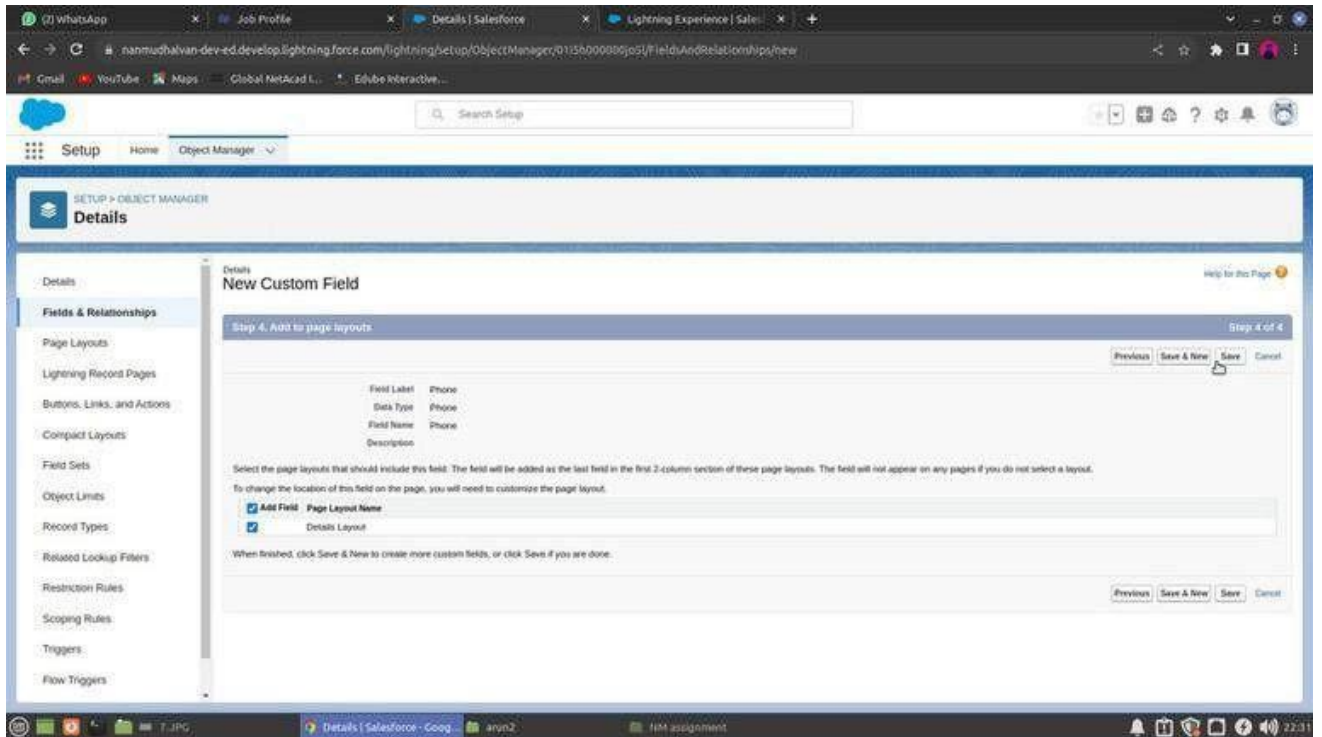
Required: ☐ Always require a value in this field in order to save a record

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

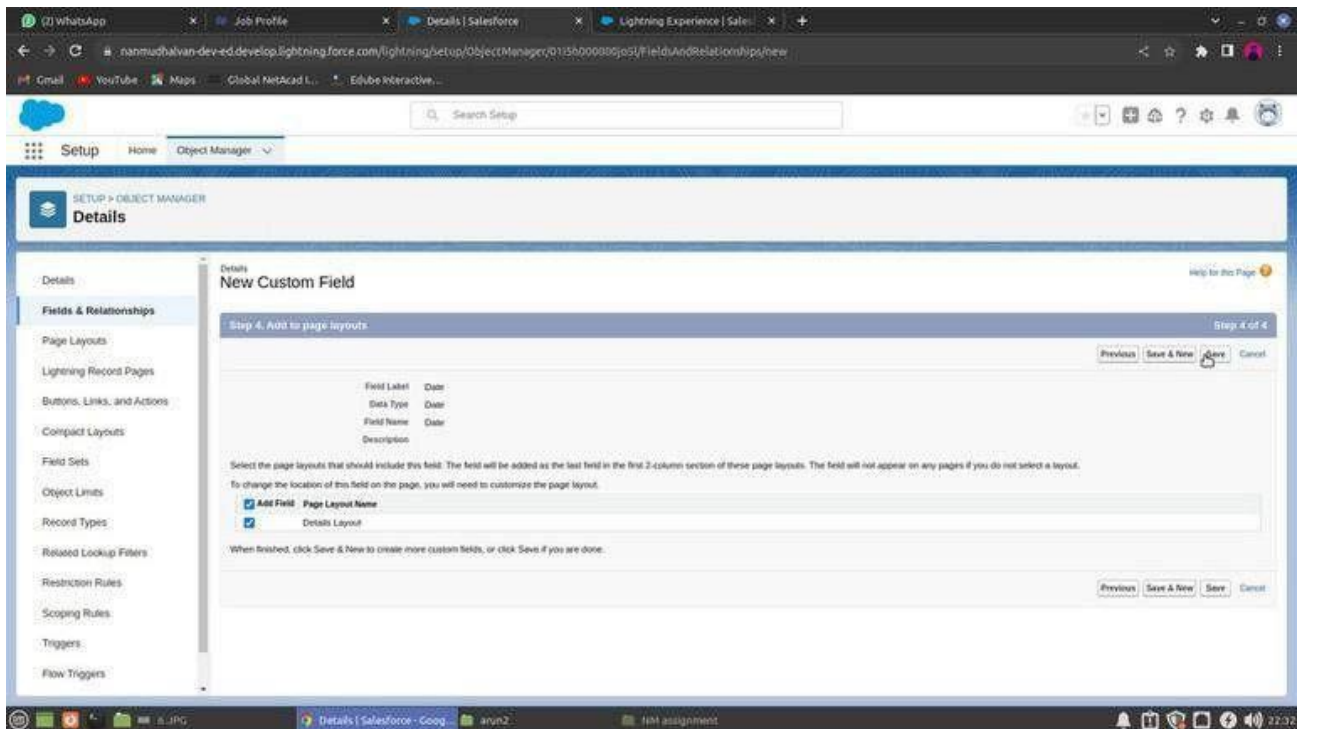
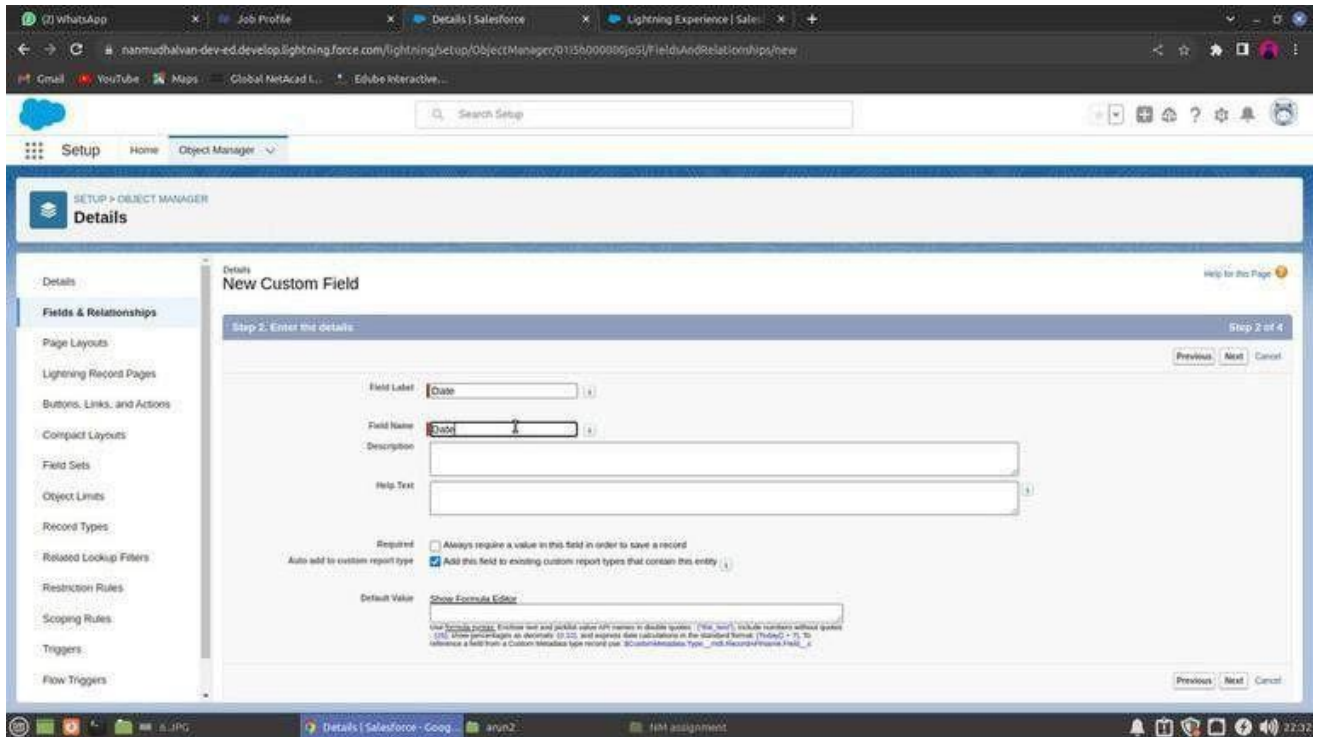
Default Value: [Show Formula Editor](#)

Use formula syntax. Enclose text and picklist values in double quotes (""). Use curly braces for formulas without quotes. Use the percentage sign for decimals (0.12). Use explicit date calculations in the standard format. (Today() + 7). To reference a field from a Custom Database type record use: \$CustomDatabaseType\_\_rmb.RecordId.Phone\_Field\_\_c

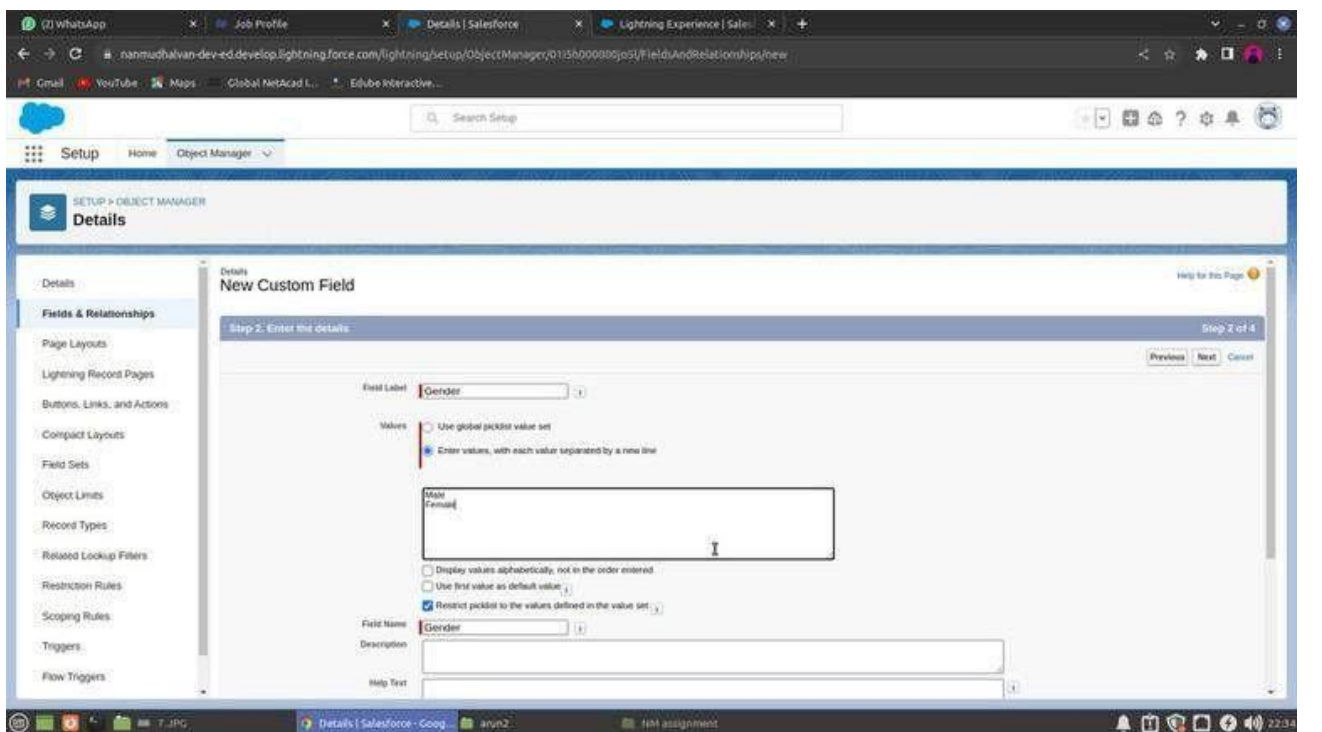
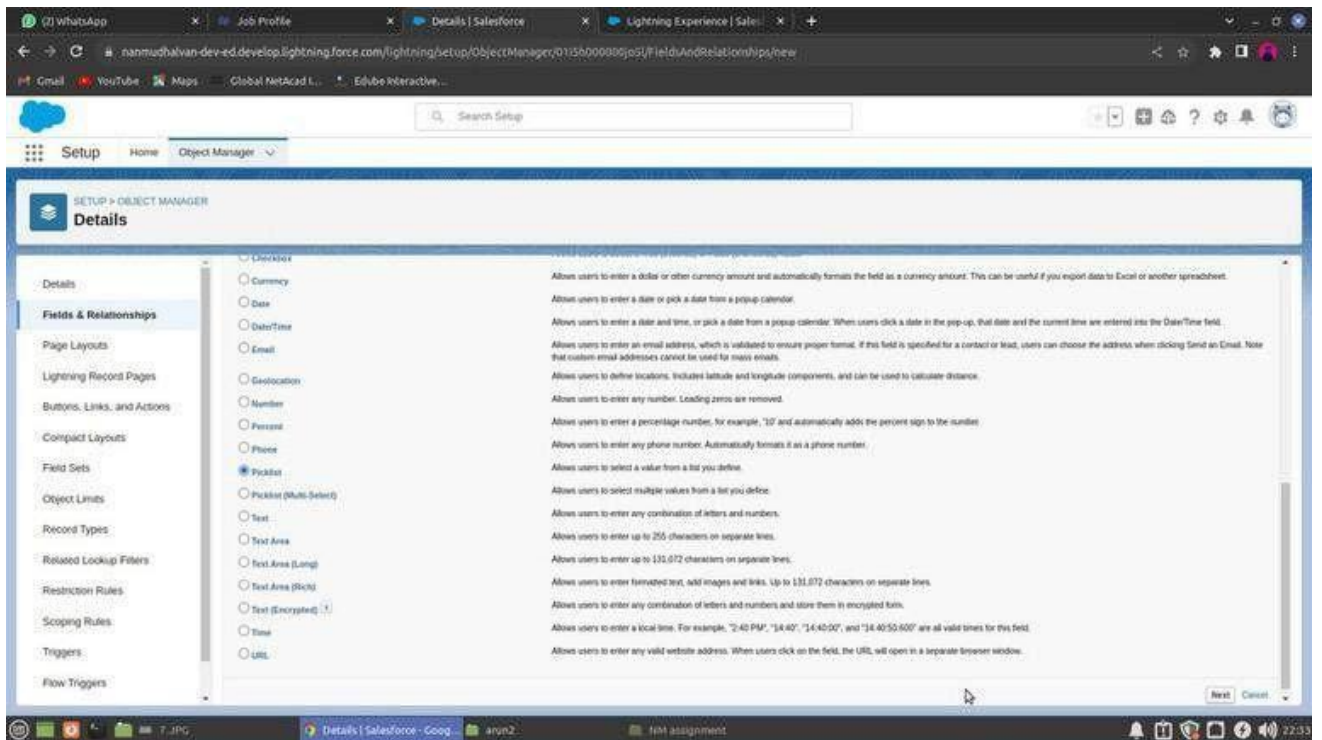
Previous Next Cancel











Setup > OBJECT MANAGER

## Details

Details

**Fields & Relationships**

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Restriction Rules
- Scoping Rules
- Triggers
- Flow Triggers

### New Custom Field

Step 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.  |                  |
| <input checked="" type="checkbox"/> Add Field  | Page Layout Name |
| <input checked="" type="checkbox"/>  | 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

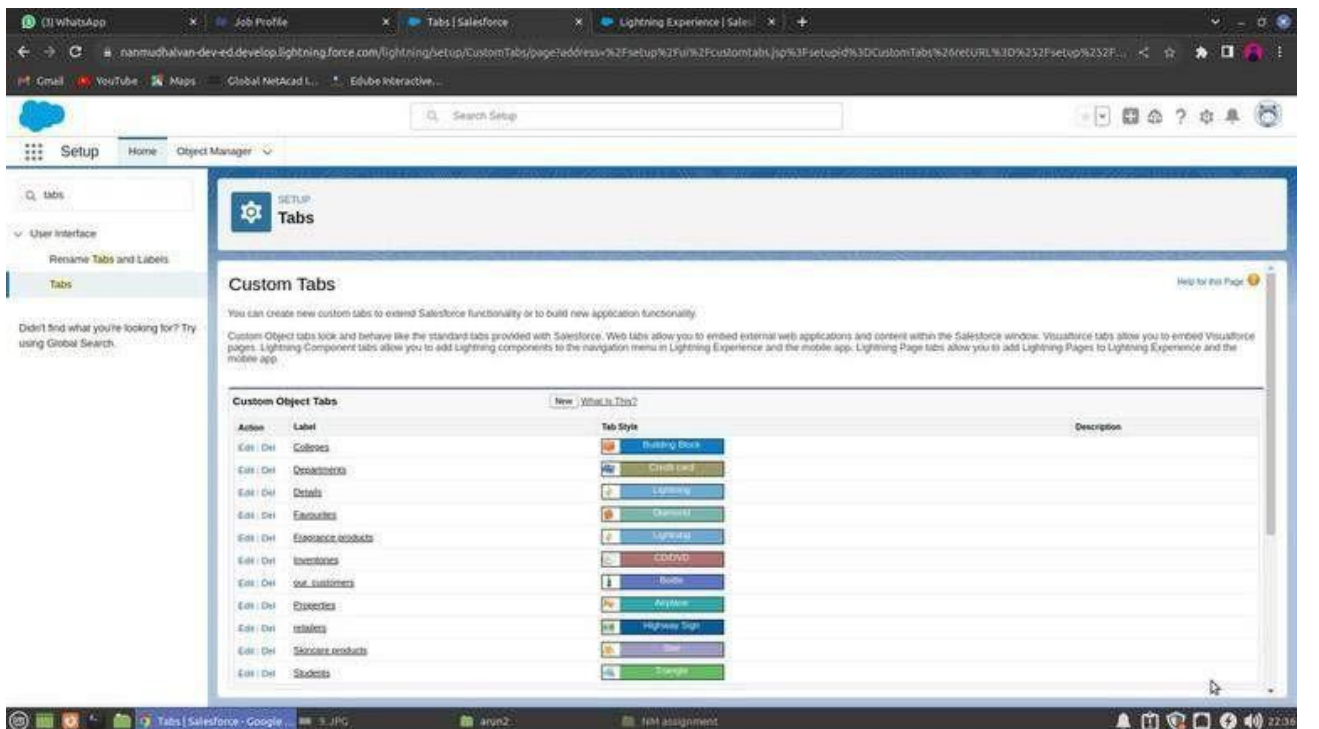
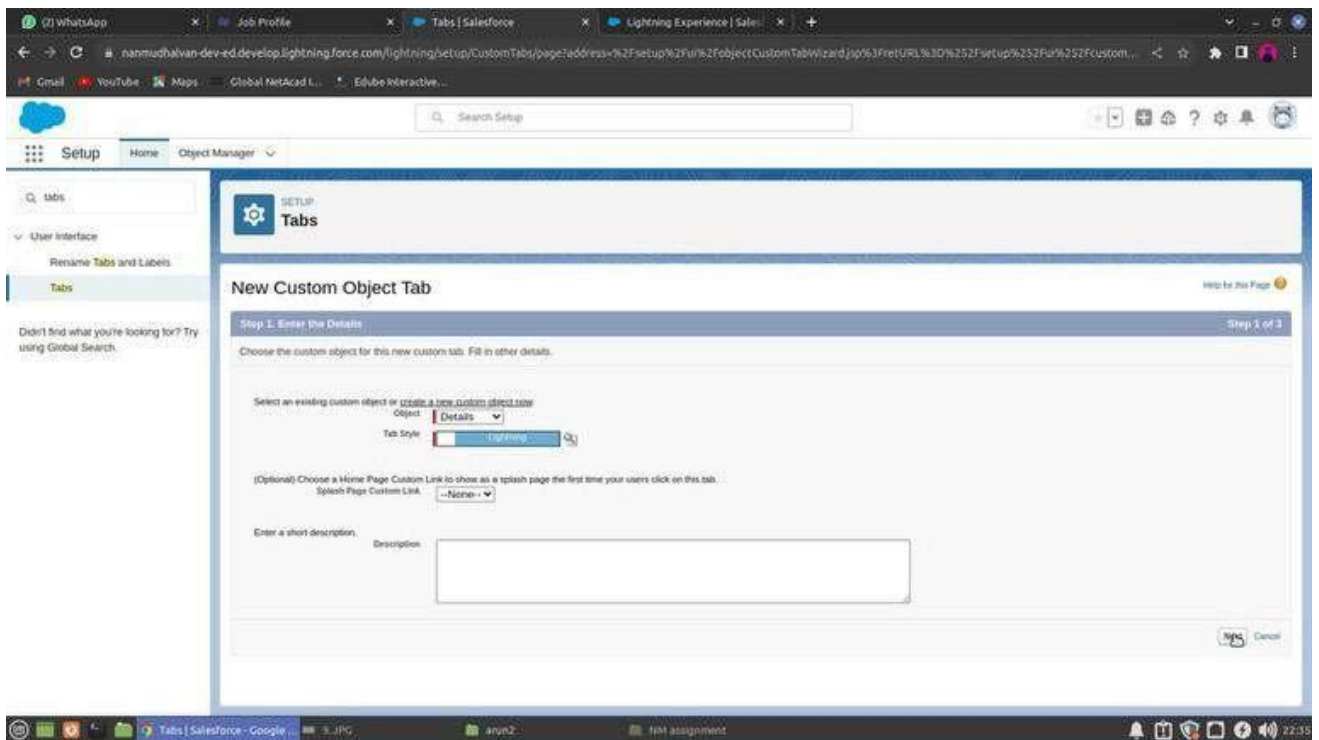
**Fields & Relationships**

8 Items, Sorted by Field Label

[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               |                   | <input type="checkbox"/>            |
| Details Name     | Name             | Text(80)           |                   | <input checked="" type="checkbox"/> |
| Gender           | Gender__c        | Picklist           |                   | <input type="checkbox"/>            |
| Last Modified By | LastModifiedById | Lookup(User)       |                   |                                     |
| Mail             | Mail__c          | Email              |                   | <input type="checkbox"/>            |
| Owner            | OwnerId          | Lookup(User/Group) |                   | <input checked="" type="checkbox"/> |
| Phone            | Phone__c         | Phone              |                   | <input type="checkbox"/>            |

8-IPC



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.

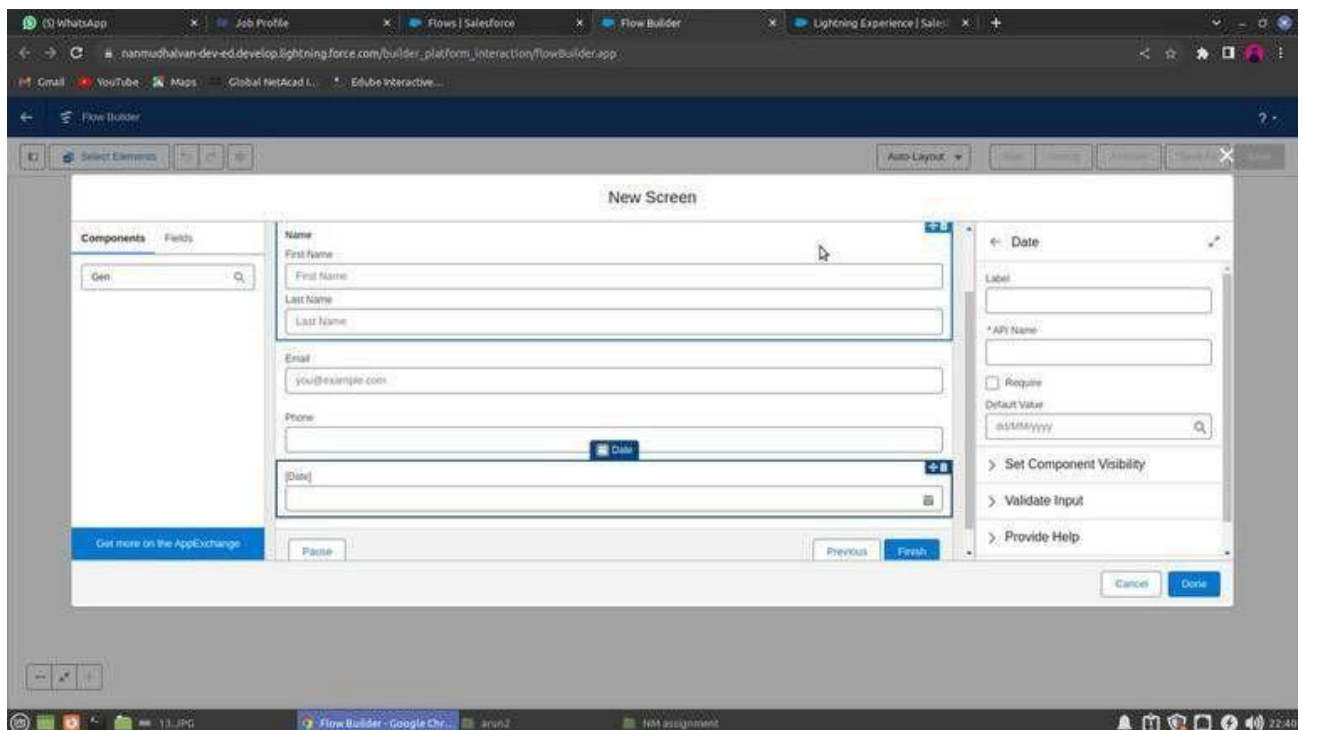
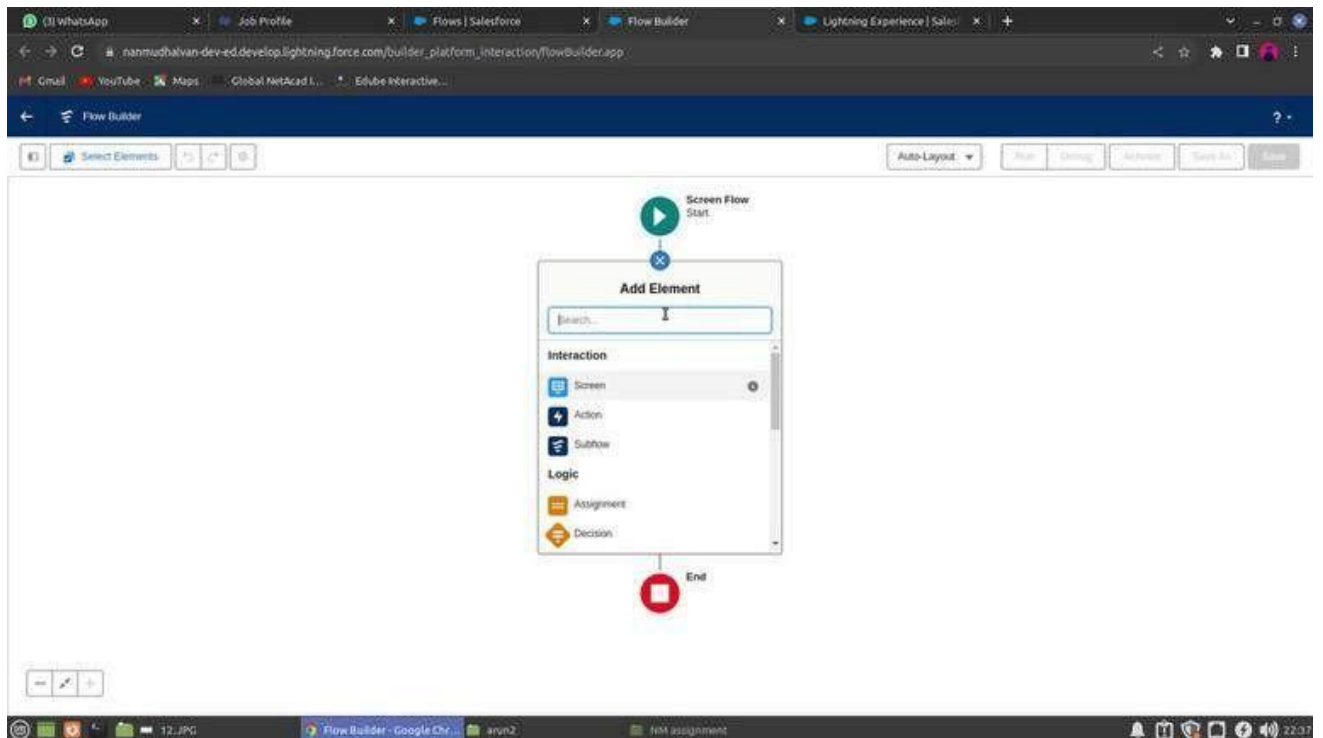
**Autolaunched Flow (No Trigger)**  
Launches when invoked by Apex, processes, REST API, and more. This autolaunched flow runs in the background.

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

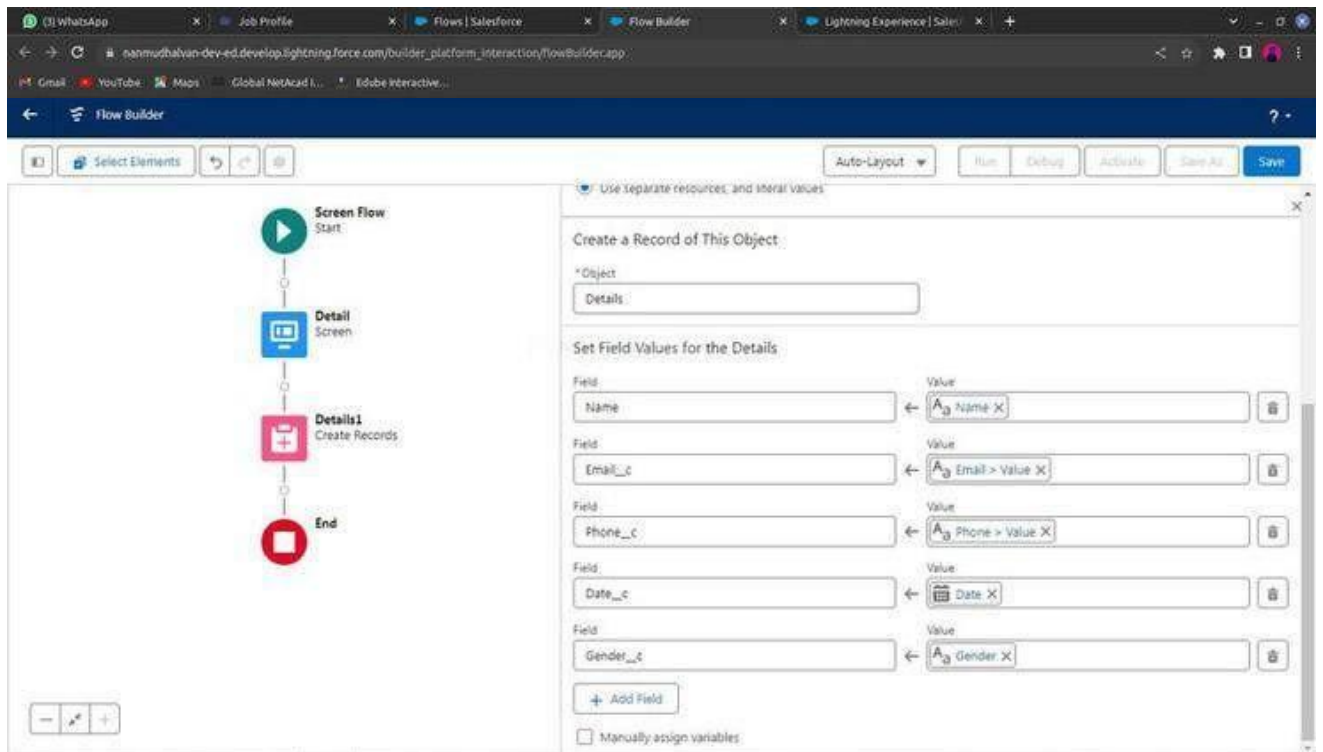
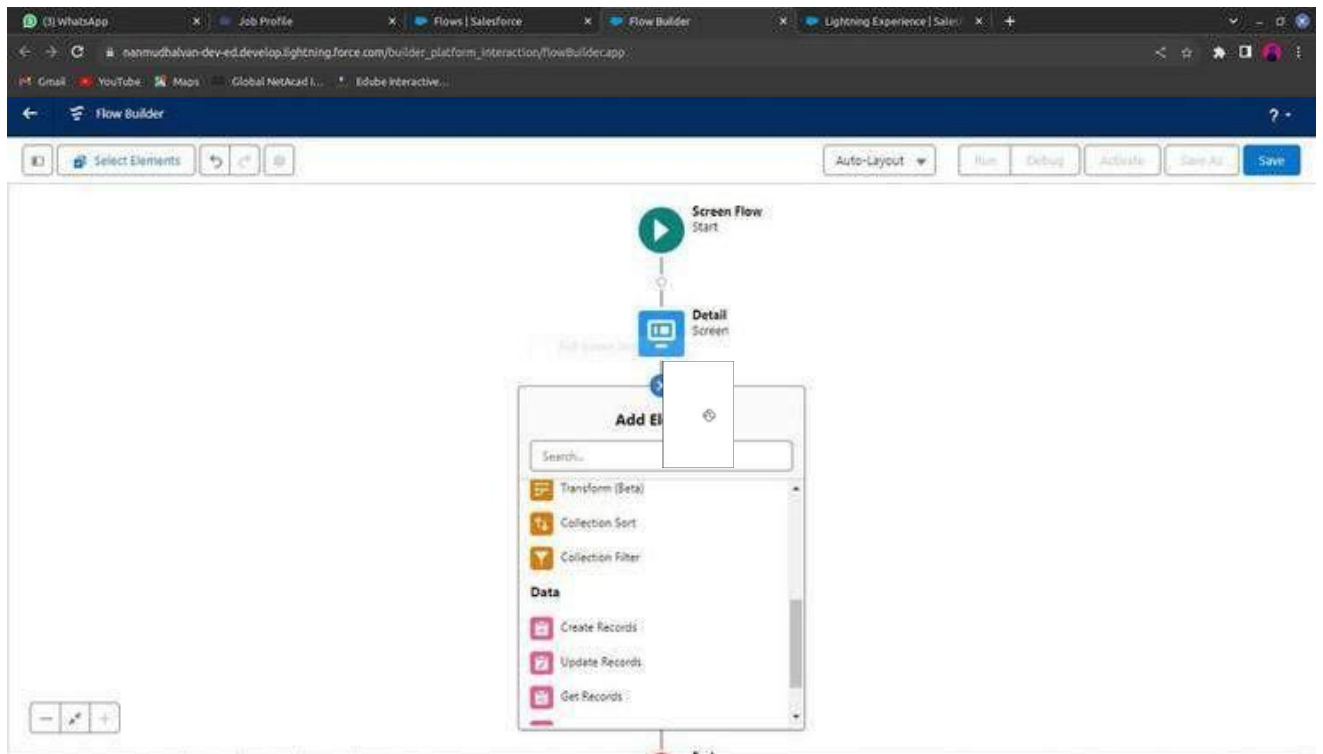
**Platform Event—Triggered Flow**  
Launches when a platform event message is received. This autolaunched flow runs in the background.

**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

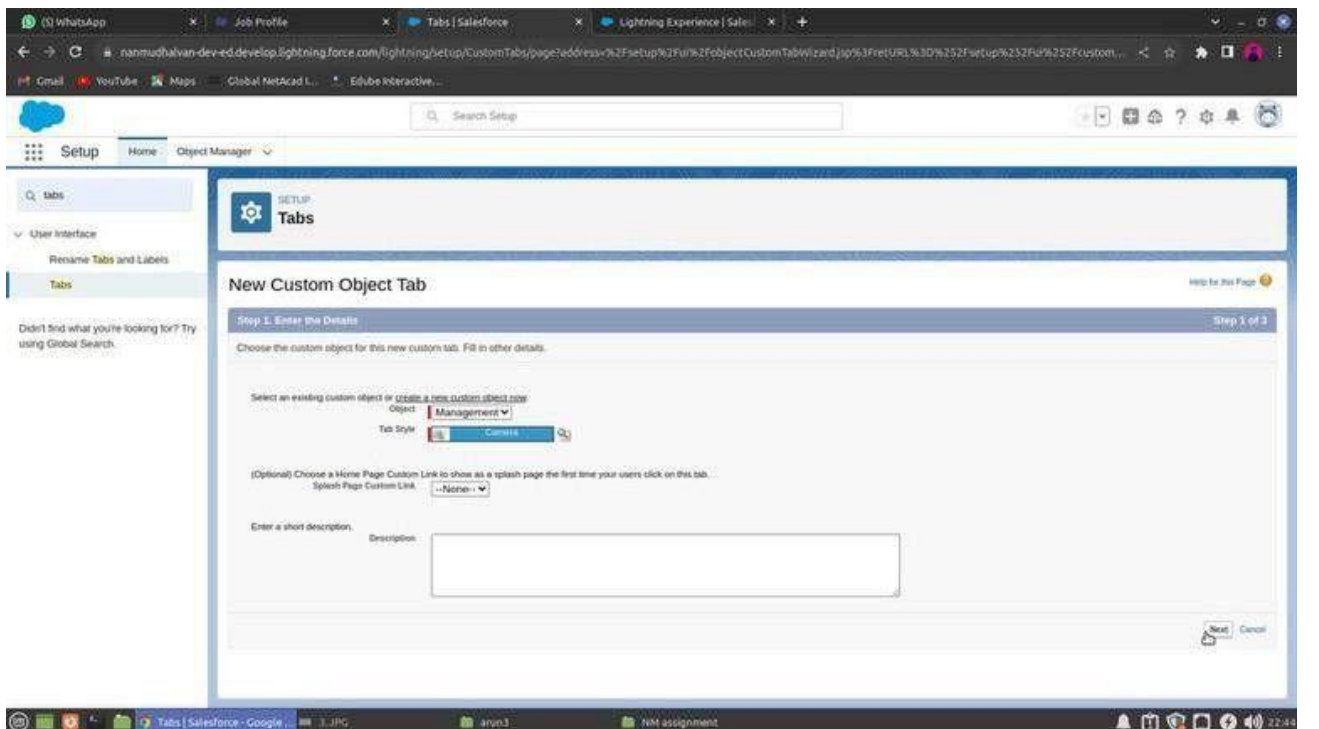
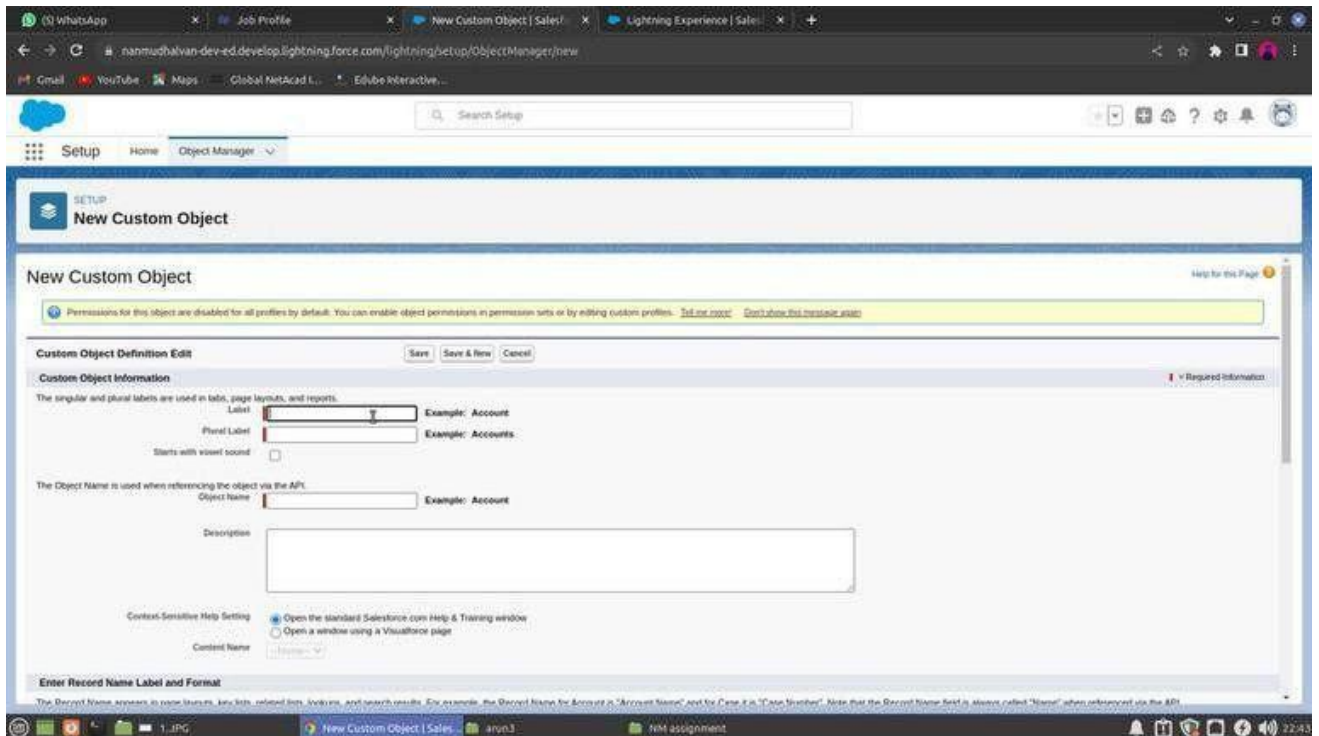
Created By

 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.

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

Profiles

Data

Mass Transfer Approval Requests

Feature Settings

Data.com

Prospector Preferences

Prospector Users

Functions

Marketing

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"/> |

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

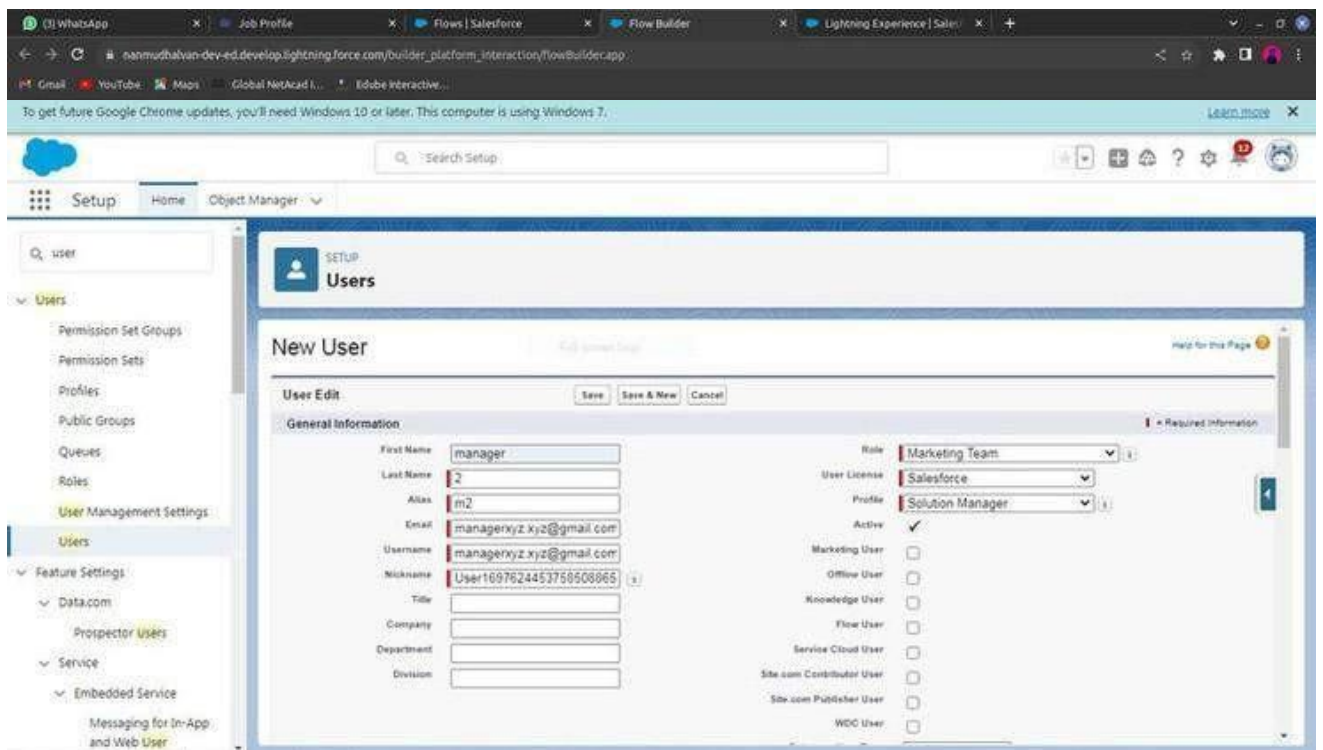
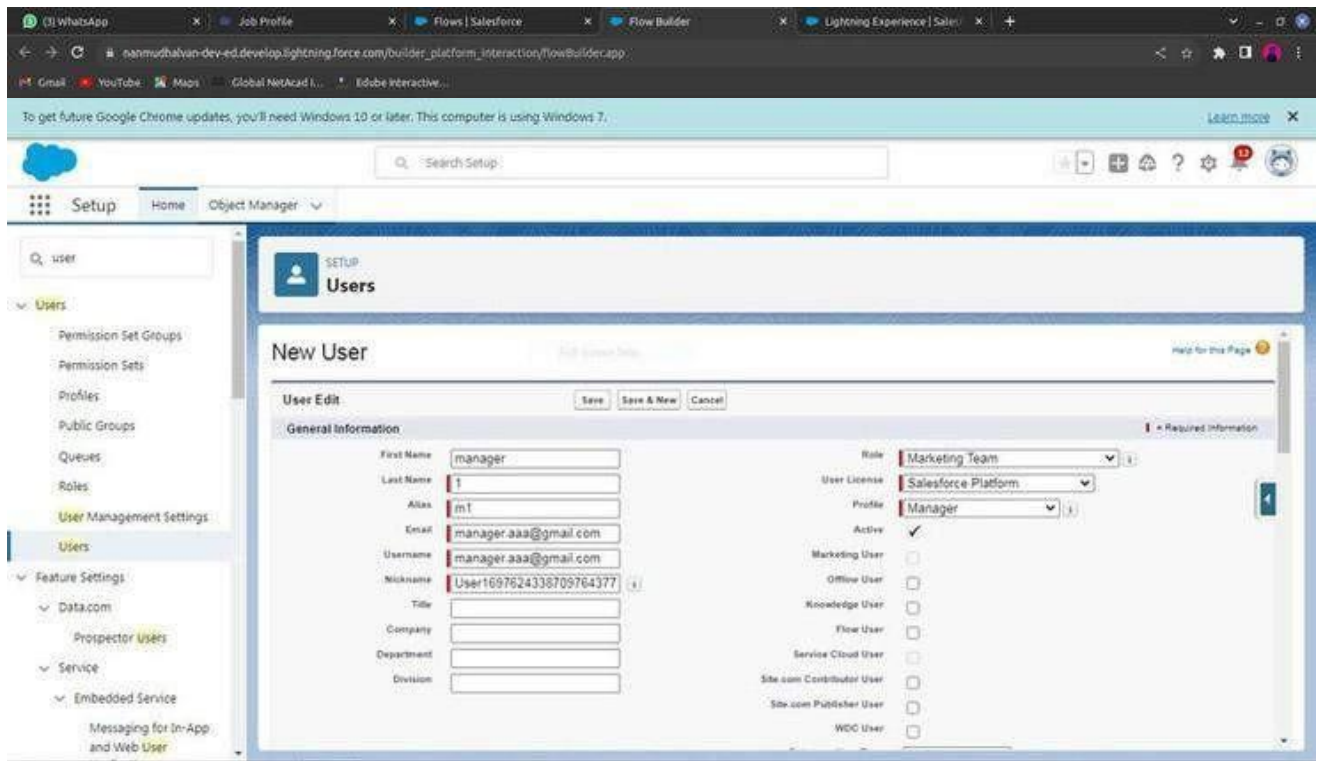
Description:

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                              |



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

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

Page Title: Setup

Search Setup

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

Search Setup

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

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

Functions

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: Enter the Details Step 1 of 3

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

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

Object:

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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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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Search Setup

Setup Home Object Manager

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

Profile: **Standard Platform User**

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

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

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

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

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

Created By: salesforce.com, inc. 17/10/2023, 10:41 am Modified By: Admin 2 18/10/2023, 3:34 pm

**Page Layouts**

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

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Search Setup

Setup Home Object Manager

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

**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 | <input type="text" value="Management"/> |

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



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Search Setup

Setup Home Object Manager

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

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.

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Search Setup

Setup Home Object Manager

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

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

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

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Search Setup: 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: ☐

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

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Search Setup: 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

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 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

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.

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

Setup Home Object Manager

per

Hyperforce Assistant

Lightning Experience Transition Assistant

Users

Permission Set Groups

Permission Sets

Feature Settings

Digital Experiences

Settings

Functions

Sales

Accounts

Person Accounts

Salesforce Scheduler

Assignment Policies

Salesforce Scheduler

SETUP

## Permission Sets

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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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

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

Address bar: nanudbalvan-dev-ed.develop.lightning.force.com/builder\_platform\_interaction/flowBuilder.app

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

Section: Customers Recently Viewed

0 items • Updated a few seconds ago

Search: Search this list...

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

| Total Life Time Value | Name |
|-----------------------|------|
| Full view link        |      |

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