

Naan Mudhalvan
Salesforce Developer(Course)
Assignment

Name : Aravindan V
Naan Mudhalvan id :au620120104006
Year & Dep : 4th year & IT
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.

6) WhatsApp

New Custom Object | Salesf...

+

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

GmailYouTubeMapsGlobal NetAcad...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. [Tell me more!](#) [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

--None--

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 | Salesf...

Sales Force Developer assi...

Salesforce

20:56

6) WhatsApp

New Custom Object | Salesf...

+

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

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Custom Object Definition Edit

SaveSave & NewCancel

Custom Object Information

= Required Information

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

LabelDepartmentExample: Account

Plural LabelDepartmentsExample: Accounts

Starts with vowel sound☐

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

Object NameDepartmentExample: Account

Description

Context-Sensitive Help Setting

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New Custom Object | Salesf...

Sales Force Developer assi...

Salesforce

20:57

Object Manager | Salesforce

nanmudhalvan-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/page?address=%2Fp%2Fsetup%2Ffield%2FCustomFieldStageManager%3Fid%3D00NSh00000GNohD%26...

Search Setup

Setup

Home

Object Manager

SETUP

Object Manager

Edit Relationship

College

Help for this Page

Step 4. Add custom related lists

Step 4 of 4

Field Label

Department

Data Type

Master-Detail

Field Name

Department

Description

Specify the title that the related list will have in all of the layouts associated with the parent.

Related List Label

College

Previous

Save & New

Save

Cancel

Previous

Save & New

Save

Cancel

(1) WhatsApp

Job Profile

Recently Viewed | our_custom...

Tabs | Salesforce

nanmudhalvan-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2FCustomTabs.jsp%3Fsetupid%3DCustomTabs%26retURL%3D%252Fsetup%252F...

Search Setup

Setup

Home

Object Manager

SETUP

Tabs

Custom Tabs

Help for this Page

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Custom Object Tabs

New

What Is This?

Action	Label	Tab Style	Description
Edit Del	Codewords	Building Block	
Edit Del	Departments	Credit card	
Edit Del	Favourites	Diamond	
Edit Del	Expirance products	Lightning	
Edit Del	Inventories	CD/DVD	
Edit Del	our customers	Boiler	
Edit Del	Properties	Airplane	
Edit Del	relations	Highway Sign	
Edit Del	Skinscare products	Sun	
Edit Del	Students	Triangle	

Web Tabs

New

What Is This?

Browser tabs: (1) WhatsApp, Job Profile, Recently Viewed | our_cust..., Department | Salesforce

Address bar: nanmudhalvan-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/011sh000000jNJJ/FieldsAndRelationships/new

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

Scoping Rules

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)

☐ 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 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", "14:40:00", and "14:40:50.600" 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

Browser tabs: (1) WhatsApp, Job Profile, Recently Viewed | our_cust..., Department | Salesforce

Address bar: nanmudhalvan-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/011sh000000jNJJ/FieldsAndRelationships/new

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

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Scoping Rules

Triggers

Flow Triggers

Department

New Custom Field

Help for this Page

Step 2 of 4

Step 2. Enter the details

Field Label

Dept_mail

Field Name

Dept_mail

Description

Help Text

Required

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

Unique

☐ Do not allow duplicate values

External ID

☐ Set this field as the unique record identifier from an external system

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 value API names in double quotes ("The API"). Include numbers without quotes (25). Show percentages as decimals (0.25), and express date calculations in the standard format: (Today() + 7). To reference a field from a Custom Metadata type record use: \$CustomMetadata.Type__myb.Record.Pickname__Field__c

Previous Next Cancel

Browser tabs: (1) WhatsApp, Job Profile, Recently Viewed | our_cust..., Department | Salesforce

Address bar: nanmudhalvan-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115h000000nJJ/FieldsAndRelationships/new

Search Setup

Setup > OBJECT MANAGER

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Scoping Rules

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.

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Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:50.600" 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.

Browser tabs: (1) WhatsApp, Job Profile, Recently Viewed | our_cust..., Department | Salesforce

Address bar: nanmudhalvan-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115h000000nJJ/FieldsAndRelationships/new

Search Setup

Setup > OBJECT MANAGER

Department

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Scoping Rules

Triggers

Flow Triggers

Department

New Custom Field

Step 2 of 4

Field Label 1

Field Name 1

Description

Help Text 1

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 ¹

Default Value

Use formula syntax: Enclose text and picklist value API names in double quotes ("the_text"). Include numbers without quotes (25). Show percentages as decimals (0.10), and express date calculations in the standard format: (Today() + 7). To reference a field from a Custom Metadata type record use: {CustomMetadata.Type__c.Record.PhoneField__c}

Previous Next Cancel

Previous Next Cancel

Waiting for nanmudhalvan-dev-ed.develop.my.salesforce.com...

[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
Full-screen Step
Help for this Page

Step 6. Add custom related lists
Step 6 of 6
Previous Save & New Save Cancel

Field Label	College
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](#)
[Home](#)
[Object Manager](#)

College

[Details](#)
[Fields & Relationships](#)
[Page Layouts](#)
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[Buttons, Links, and Actions](#)
[Compact Layouts](#)
[Field Sets](#)
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[Related Lookup Filters](#)
[Search Layouts](#)

Data Type
Full-screen Step

None Selected
Select one of the data types below:

☐ Auto Number
A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

☐ Formula
A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

☒ Roll-Up Summary
A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

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

☐ Master-Detail Relationship
Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

☐ External Lookup Relationship
Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

☐ 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.

Setup

Home

Object Manager

Search Setup

College

Fields & Relationships

5 Items, Sorted by Field Label

Full-screen View

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	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Total Count	Total_Count__c	Roll-Up Summary (COUNT Department)		

Details

Fields & Relationships

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Compact Layouts

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Related Lookup Filters

Search Layouts

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Search Setup

Lightning Experience App Manager

New Lightning App

New Connected App

22 Items • Sorted by App Name • Filtered by All appmenutems - 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	✓

Apps

App Manager

User Interface

App Menu

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

Search Setup

Setup

Home

About My Org

app n

Apps

User Int

App

Didn't find s
using Glob

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

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

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app n

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User Int

App

Didn't find s
using Glob

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 ⓘ
Upload

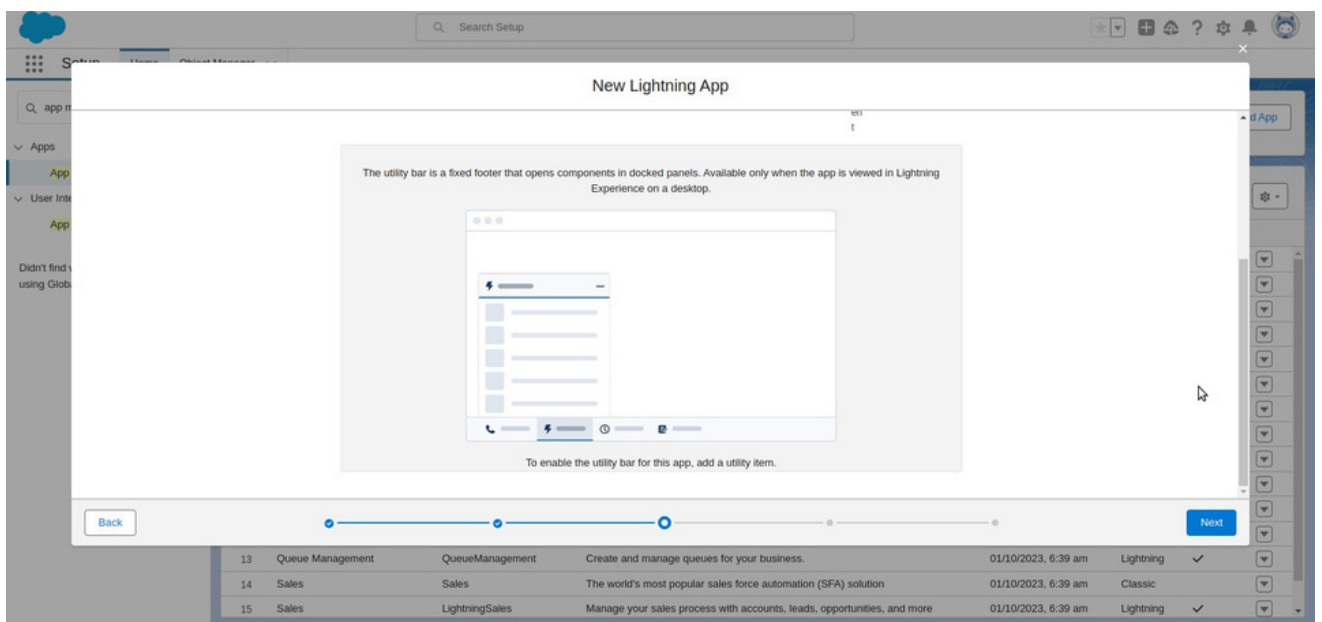
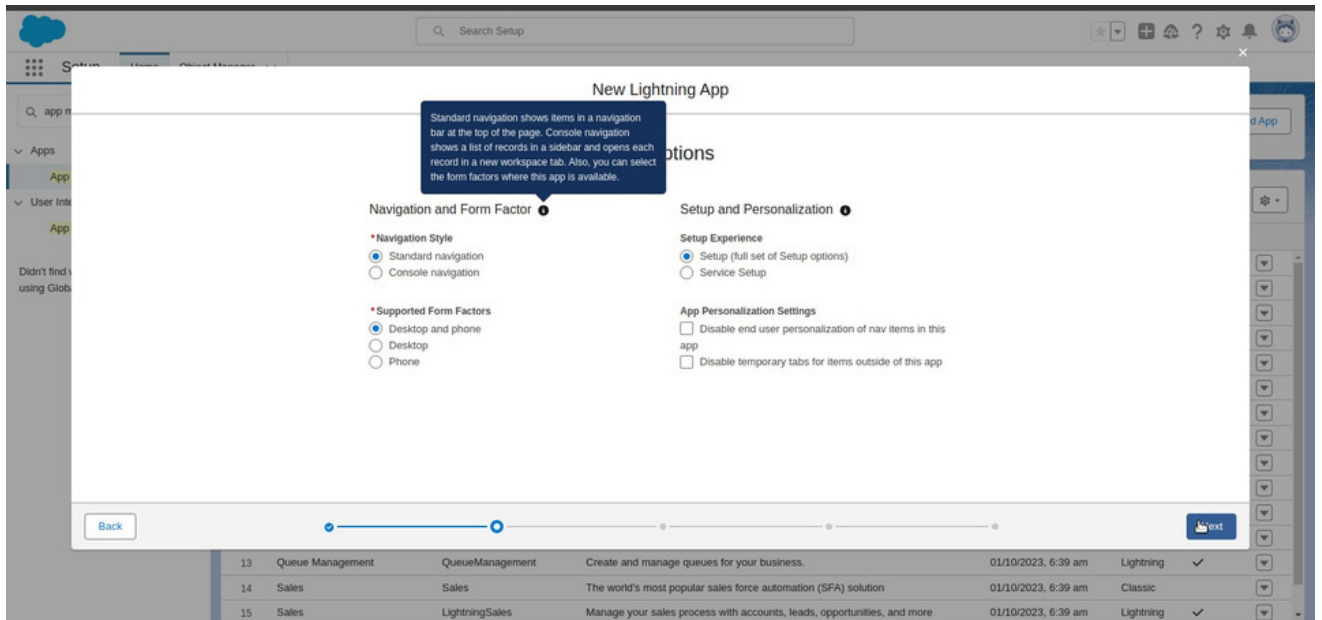
Primary Color Hex Value ⓘ
#0070D2

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

App Launcher Preview

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

Setup

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Ext

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Mob

Salesforce

Salesforce Branding

Salesforce Navigation

New Lightning App

App Details

* App Name ⓘ

My_App

* Developer Name ⓘ

My_App

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

My

My_App

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

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Salesforce Branding

Salesforce Navigation

New Lightning App

Available Profiles

sy

Salesforce API Only System Integrations

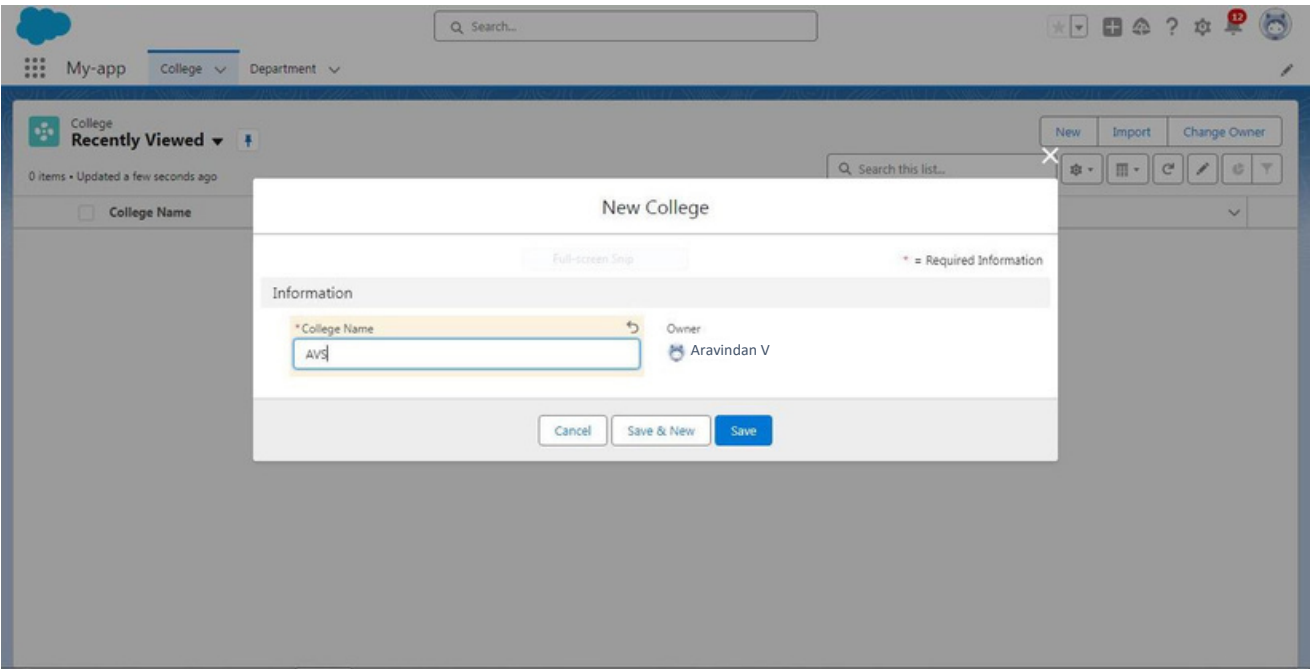
Selected Profiles

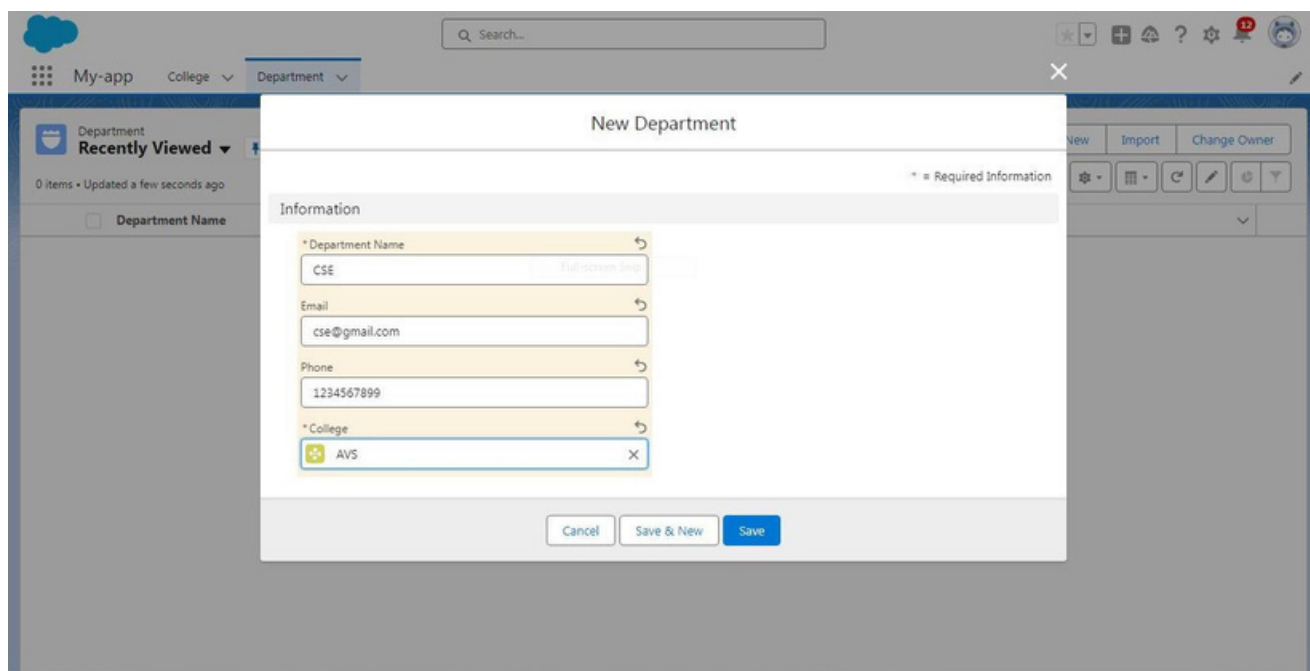
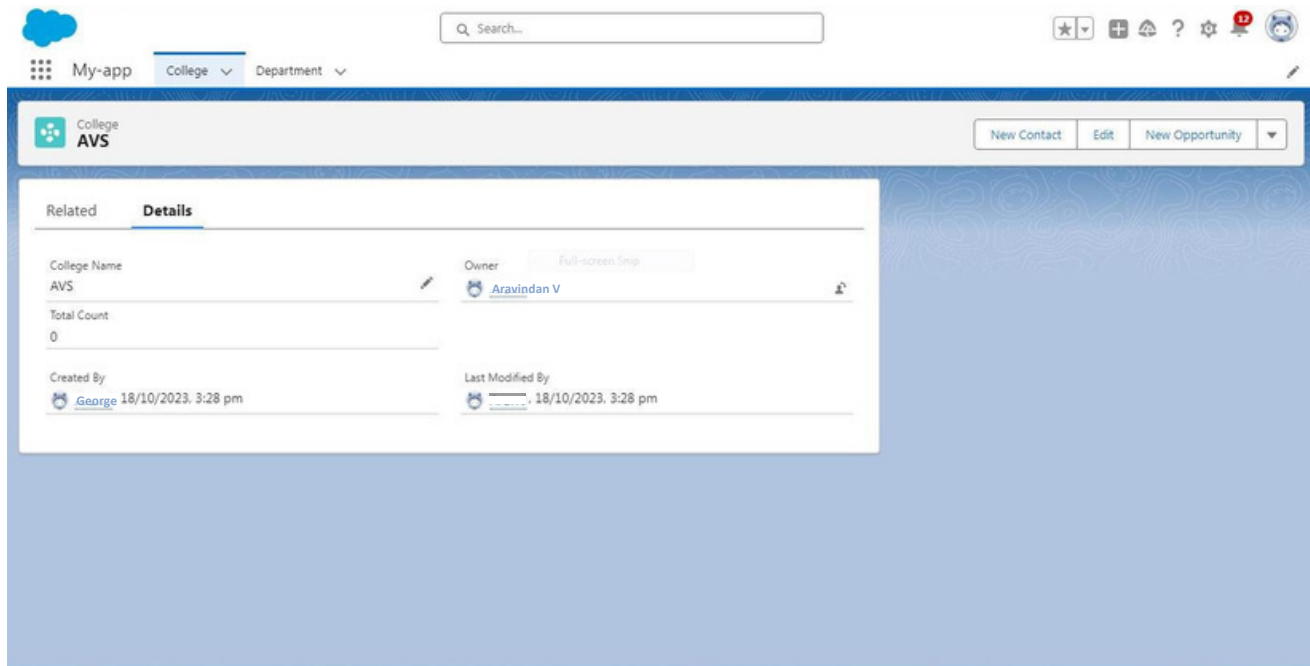
System Administrator


Back

Save & Finish

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	✓














My-app

College

Department

Q Search...



Department CSE

Department CSE was created.

New ContactEditNew Opportunity

RelatedDetails

Department Name

CSE

Full-screen Snp

Email

cse@gmail.com

Phone

1234567899

College


AVS

Created By

George 18/10/2023. 3:29 pm

Last Modified By

18/10/2023. 3:29 pm










My-app

College

Department

Q Search...



College AVS

New ContactEditNew Opportunity

RelatedDetails

College Name

AVS

Owner

Full-screen Snp

Total Count

1

Created By

George 18/10/2023. 3:28 pm

Last Modified By

18/10/2023. 3:29 pm

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

Notification: 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

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** [Full-screen Snp](#) [Video Tutorial](#) [Help for this Page](#)

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

Permission Set Overview > Object Settings > Accounts

Accounts

Save Cancel

Object Permissions

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

Field Permissions

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

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

Notification: 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

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

All Users

1 item selected

Search this list...

	Full Name ↑	AI...	Username	Role	A...	Profile
<input type="checkbox"/>	 Aravindan V	I	arunj@123gmail.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	 Chatter Expert	Chatter	chatty00d5j00000dq4hgeat.t3yy9pn6v4mm@c...		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	 consumer 1	c1	cons143@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	consumer
<input type="checkbox"/>	 Integration User	integ	integration@00d5j00000dq4hgeat.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	 manager 1	m1	managerabc.abc@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Manager
<input type="checkbox"/>	 manager 2	m2	managerxyz.xyz@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Solution Manager
<input checked="" type="checkbox"/>	 manager bank	mbank	managerbank123@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Salesforce API Only System Integratio...

Cancel Next

3) WhatsApp

Job Profile


Flows | Salesforce

Flow Builder

Lightning Experience | Sales

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

GmailYouTubeMapsGlobal NetAcad L...Edube Interactive...



★


+

🔔

?

⚙️

🔴12



My-app

Recently Viewed

College ▾

Department ▾

Details ▾

Management ▾

Customers ▾

Bank ▾

 Customers

Recently Viewed ▾ 

0 items • Updated a few seconds ago

⚙️

📄

🔄

✎

🗑️

⏏

New

☐ Total Life Time Value ▾

Name ▾

Full-screen Snip

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