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Salesforce Developer(Course)
Assignment

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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.

Screenshot of the Salesforce Setup interface showing the creation of a new custom object named "College".

New Custom Object

Custom Object Definition Edit

Custom Object Information

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

Label: College (Example: Account)
Plural Label: Colleges (Example: Accounts)
Starts with vowel sound:

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

Object Name: College (Example: Account)

Description: (Empty text area)

Content-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 Name: College Name (Example: Account Name)

Save | Save & New | Cancel | Help for this Page

Screenshot of the Salesforce Setup interface showing the creation of a new custom object named "Department".

New Custom Object

Custom Object Definition Edit

Custom Object Information

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

Label: Department (Example: Account)
Plural Label: Departments (Example: Accounts)
Starts with vowel sound:

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

Object Name: Department (Example: Account)

Description: (Empty text area)

Content-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 Name: Department Name (Example: Account Name)

Save | Save & New | Cancel | Help for this Page

Screenshot of the Salesforce Object Manager setup page for the 'College' object.

Object Manager - Step 4 of 4

Related List Label: College

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

Buttons: Previous, Save & New, Save, Cancel

Screenshot of the Salesforce Tabs setup page.

Custom Tabs

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.

Action	Label	Tab Style	Description
Edit Del	Colleges	Building Block	
Edit Del	Departments	Credit card	
Edit Del	Favourites	Diamond	
Edit Del	Ergance_products	Lightning	
Edit Del	Inventories	CD/DVD	
Edit Del	our_customers	Bottle	
Edit Del	Properties	Airplane	
Edit Del	retailers	Highway Sign	
Edit Del	Skincare_products	Tire	
Edit Del	Students	Triangle	

Web Tabs

New | What Is This?

Screenshot of the Salesforce Object Manager - Department page.

The left sidebar shows navigation links: 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, and Flow Triggers.

The main content area displays field types and their descriptions:

- 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. Note that custom email addresses cannot be used for mass emails.
- Geolocation: Allows users to define location. 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.
- Text Area: Allows users to enter up to 255 characters on separate lines.
- Text Area (Long): Allows users to enter up to 131,072 characters on separate lines.
- Text Area (Rich): Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.
- Text (Encrypted): Allows users to enter any combination of letters and numbers and store them in encrypted form.
- Time: 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.
- URL: Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

Buttons at the bottom right: Next, Cancel.

Screenshot of the Salesforce Object Manager - Department New Custom Field page.

The left sidebar shows navigation links: 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, and Flow Triggers.

The main content area shows Step 2: Enter the details for a new custom field named "Dept_mail".

Form fields:
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 names in double quotes. ('the_text'), include numbers without quotes : [25], show percentages as decimal: [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__mdt}RecordName.FieldName

Buttons at the top right: Step 2 of 4, Previous, Next, Cancel.

Screenshot of the Salesforce Object Manager page for the 'Department' object.

The left sidebar shows the 'Fields & Relationships' section selected. A list of field types is displayed with their descriptions:

- 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

Each field type has a detailed description below it. At the bottom right of the page are 'Next' and 'Cancel' buttons.

Screenshot of the 'New Custom Field' setup page for the 'Department' object.

The left sidebar shows the 'Fields & Relationships' section selected. The main area is titled 'Step 2. Enter the details'.

Form fields include:

- Field Label:** Dept_No.
- Field Name:** Dept_No
- Description:** (empty text area)
- Help Text:** (empty text area)

Configuration options under 'Required' and 'Auto add to custom report type':

- Always require a value in this field in order to save a record
- Add this field to existing custom report types that contain this entity

Under 'Default Value':

- Show Formula Editor

A note at the bottom states: "Use formula syntax: Enclose text and picklist value API names in double quotes ('Dept_No'). Include numbers without quotes ('123'), show percentages as decimals (.123), and express date calculations in the standard format ('Today') + 7]. To reference a field from a Custom Metadata type record use: \$CustomMetadata.Type__mdt Records\$!Name Field__c".

At the bottom right are 'Previous', 'Next', and 'Cancel' buttons.

Screenshot of the Salesforce Setup interface showing the Object Manager for the 'Department' object.

The left sidebar shows navigation links: 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, and Flow Triggers.

The main content area is titled 'Fields & Relationships' and lists 7 items, sorted by Field Label:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Department Name	Name	Text(80)		✓
Dept_mail	Dept_mail__c	Email		▼
Dept_No.	Dept_No__c	Phone		▼
Last Modified By	LastModifiedBy	Lookup(User)		✓
Owner	OwnerId	Lookup(User,Group)		✓
Total_Count	Total_Count__c	Roll-Up Summary (COUNT College)		▼

Taskbar icons include: Home, Recent, 17.JPG, Department | Salesforce, linux, arun1, and system notifications.

Screenshot of the Salesforce Setup interface showing the 'Fields & Relationships' configuration for a custom field.

The left sidebar shows navigation links: 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.

The main content area is titled 'Data Type' and asks: 'Specify the type of information that the custom field will contain.'

The 'Data Type' section includes:

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

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

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: Department

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
 College Layout
 Append related list to users' existing personal customizations

Help for this Page

Step 6 of 6

Previous Save & New Save Cancel

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

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 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.

Cloud icon

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

College New Custom Field

Step 2. Enter the details Step 2 of 5

Field Label: Total Count

Field Name: Total_Count

Description:

Help Text:

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

Previous Next Cancel

Cloud icon

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

Step 3. Define the summary calculation Step 3 of 5

Select Object to Summarize

Master Object: College
Summarized Object: Department

Select Roll-Up Type

COUNT
 SUM
 MIN
 MAX

Field to Aggregate: None

Filter Criteria

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

Previous Next Cancel

Setup | Home | Object Manager

SETUP > OBJECT MANAGER
College

Fields & Relationships				
5 Items, Sorted by Field Label				
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)		

Setup | Home | Object Manager

Q app m

Apps

App Manager

User Interface

App Menu

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

SETUP
Lightning Experience App Manager

New Lightning App | New Connected App

22 Items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type						
App Name ↑	Developer Name	Description	Last Modified Date	App T...	Visib...	⋮
1 All Tabs	AllTabSet	Build CRM Analytics dashboards and apps	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	✓	⋮

<https://namruthalivane-dev.lightning.force.com/o/one/app#/setup/NavigationMenus/home>

New Lightning App

App Details & Branding

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

App Details

* App Name

* Developer Name

Description

App Branding

Image

Primary Color Hex Value

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

App Launcher Preview

Next

13	Queue Management	QueueManagement	Create and manage queues for your business.	01/10/2023, 6:39 am	Lightning	<input checked="" type="checkbox"/>
14	Sales	Sales	The world's most popular sales force automation (SFA) solution	01/10/2023, 6:39 am	Classic	<input type="checkbox"/>
15	Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	01/10/2023, 6:39 am	Lightning	<input checked="" type="checkbox"/>

New Lightning App

App Details & Branding

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

App Details

* App Name

* Developer Name

Description

App Branding

Image

Primary Color Hex Value

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

App Launcher Preview

Next

13	Queue Management	QueueManagement	Create and manage queues for your business.	01/10/2023, 6:39 am	Lightning	<input checked="" type="checkbox"/>
14	Sales	Sales	The world's most popular sales force automation (SFA) solution	01/10/2023, 6:39 am	Classic	<input type="checkbox"/>
15	Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	01/10/2023, 6:39 am	Lightning	<input checked="" type="checkbox"/>

New Lightning App

Standard navigation shows items in a navigation bar at the top of the page. Console navigation shows a list of records in a sidebar and opens each record in a new workspace tab. Also, you can select the form factors where this app is available.

Navigation and Form Factor

* Navigation Style
 Standard navigation
 Console navigation

* Supported Form Factors
 Desktop and phone
 Desktop
 Phone

Setup and Personalization

Setup Experience
 Setup (full set of Setup options)
 Service Setup

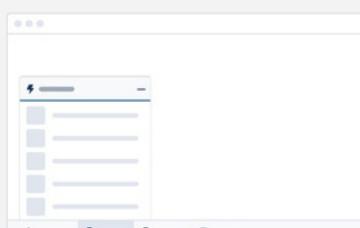
App Personalization Settings
 Disable end user personalization of nav items in this app
 Disable temporary tabs for items outside of this app

Back **Next**

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

New Lightning App

The utility bar is a fixed footer that opens components in docked panels. Available only when the app is viewed in Lightning Experience on a desktop.



To enable the utility bar for this app, add a utility item.

Back **Next**

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

New Lightning App

App Details

*App Name: My_App

*Developer Name: My_App

Description: Enter a description...

App Branding

Image: 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 ✓

New Lightning App

Available Profiles

sy Salesforce API Only System Integrations

Selected Profiles

System Administrator

Save & Finish

Back

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 shows a Microsoft Dynamics 365 application interface. At the top, there's a navigation bar with a cloud icon, the text "My-app", and dropdown menus for "College" and "Department". A search bar is located at the top right. Below the navigation bar, a sidebar on the left lists "College Recently Viewed" with a count of "0 items • Updated a few seconds ago" and a checkbox for "College Name". The main area is titled "New College" and contains a form with the following fields:

- Information** section with a "College Name" field containing "AVS" and an "Owner" field showing "Pandi".
- Buttons at the bottom: "Cancel", "Save & New", and a blue "Save" button.

A status bar at the bottom indicates "Full-screen Snp" and "Required Information".

This screenshot shows a CRM application interface for a college named AVS. The top navigation bar includes a cloud icon, the title 'My-app', and dropdown menus for 'College' and 'Department'. A search bar and various system icons are also present. The main content area displays the 'Details' tab for the AVS college record. Key fields shown include:

- College Name:** AVS
- Total Count:** 0
- Created By:** Pandi (18/10/2023, 3:28 pm)
- Last Modified By:** Pandi (18/10/2023, 3:28 pm)
- Owner:** Pandi

A 'Full-screen Snip' button is located in the top right corner of the details panel.

This screenshot shows a CRM application interface for creating a new department. The top navigation bar is similar to the previous screenshot, with 'My-app', 'College', and 'Department' menus. The main content area is titled 'New Department' and contains a form for entering department information. The required fields are highlighted in yellow. The form includes:

- Information** section with:
 - *Department Name:** CSE
 - Email:** cse@gmail.com
 - Phone:** 1234567899
 - *College:** AVS
- Buttons at the bottom: 'Cancel', 'Save & New', and 'Save'

The top right of the form has buttons for 'New', 'Import', and 'Change Owner', along with other standard CRM icons.

My-app College Department

Department CSE

Department CSE was created.

Related Details

Department Name
CSE

Email
Cse@gmail.com

Phone
1234567899

College
AVS

Created By
 Pandi 18/10/2023, 3:29 pm

Last Modified By
 George 18/10/2023, 3:29 pm

Full-screen Snp

New Contact Edit New Opportunity

My-app College Department

College AVS

Owner
 Pandi

Related Details

College Name
AVS

Total Count
1

Created By
 Pandi 18/10/2023, 3:28 pm

Last Modified By
 Pandi 18/10/2023, 3:29 pm

Full-screen Snp

New Contact Edit New Opportunity

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.

Screenshot of the Salesforce Setup interface showing the "New Custom Object" creation page.

Page Title: New Custom Object | Salesfo...

Section: Custom Object Definition Edit

Custom Object Information:

- Label: Details (Example: Account)
- Plural Label: Details (Example: Accounts)
- Starts with vowel sound:

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

Object Name: Details (Example: 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 main layouts, list layouts, 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.

Save Save & New Cancel

Help for this Page

Setup Home Object Manager

Search Setup

1.JPG Details | Salesforce arun2 NM assignment

Screenshot of the Salesforce Setup interface showing the "Details" page for the custom object.

Page Title: Details | Salesforce | nanmudhalvan-dev-ed.lightning.force.com

Section: 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

Details:

Description:

API Name: Details_c

Custom:

Singular Label: Details

Plural Label: Details

Enable Reports:

Track Activities:

Track Field History:

Deployment Status: Deployed

Help Settings: Standard salesforce.com Help Window

Edit Delete

Setup Home Object Manager

Search Setup

2.JPG Details | Salesforce - Google Chrome arun2 NM assignment

Screenshot of the Salesforce Object Manager Details page for the Job Profile object.

Fields & Relationships

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)		✓

Screenshot of the Salesforce Object Manager Details page for the Job Profile object, showing the Fields & Relationships section.

Fields & Relationships

- Lookup Relationship
- Master-Detail Relationship
- External 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.

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

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

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

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

- Checkbox
- Currency
- Date
- DateTime
- Email
- Geolocation
- Number
- Percent
- Phone
- Picklist
- Picklist (Multi-Select)
- Text

Screenshot of the Salesforce Setup interface showing the creation of a new custom field.

The left sidebar shows the navigation path: SETUP > OBJECT MANAGER > Details.

The main content area is titled "New Custom Field".

Step 2. Enter the details:

- Field Label:** Mail
- Field Name:** Mail
- Description:** (Empty)
- Help Text:** (Empty)
- 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 editor. Enclose text and picklist value # in double quotes. ('the_text'), include numbers without quotes :#(1), show percentages as decimal (.1), and express date calculations in the standard format: (Today() + 7). To reference a field from a Custom Metadata type record use: \${CustomMetadataType__mdt} RecordName.FieldName__c

Buttons at the top right: Previous, Next, Cancel.

Screenshot of the Salesforce Setup interface showing the addition of page layouts for a new custom field.

The left sidebar shows the navigation path: SETUP > OBJECT MANAGER > Details.

The main content area is titled "New Custom Field".

Step 4. Add to page layouts:

Field Label: Mail
Data Type: Email
Field Name: Mail
Description: (Empty)

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

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

Add Field Page Layout Name
 Details Layout

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

Buttons at the top right: Previous, Save & New, Save, Cancel.

Screenshot of the Salesforce Object Manager - Details page.

The left sidebar shows the navigation path: SETUP > OBJECT MANAGER > Details.

The main content area displays a list of field types:

- Currency
- Date
- DateTime
- Email
- Geolocation
- Number
- Percent
- Phone**
- Picklist
- Picklist (Multi-Select)
- Text
- TextArea
- TextArea (Long)
- TextArea (Rich)
- Text (Encrypted) (1)
- Time
- URL

Each field type has a brief description below it.

Buttons at the bottom right: Next, Cancel.

Screenshot of the Salesforce Object Manager - Details page showing the creation of a new custom field.

The left sidebar shows the navigation path: SETUP > OBJECT MANAGER > Details.

The main content area shows "Step 2. Enter the details" for a "New Custom Field".

Form fields:

- Field Label: Phone
- Field Name: Phone
- Description: (empty)
- Help Text: (empty)

Required settings:

- Always require a value in this field in order to save a record
- Add this field to existing custom report types that contain this entity (1)

Default Value: Show Formula Editor

Formula Editor instructions:Use formula syntax. Enclose text and picklist value API names in double quotes: '{!the_text}', include numbers without quotes: [25], show percentages as decimal: 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__mdt.RecordId}#Name__c

Buttons at the bottom right: Previous, Next, Cancel.

Screenshot of the Salesforce Setup interface showing the creation of a new custom field.

Details

New Custom Field

Step 4. Add to page layouts

Field Label: Phone
 Data Type: Phone
 Field Name: Phone
 Description:

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

Add Field Page Layout Name
 Details Layout

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

Help for this Page

Previous Save & New Save Cancel

Screenshot of the Salesforce Setup interface showing the selection of field types.

Details

Fields & Relationships

- Currency
- Date
- Date/Time
- Email
- Geolocation
- Number
- Percent
- Phone
- Picklist
- Picklist (Multi-Select)
- Text
- Text Area
- Text Area (Long)
- Text Area (Rich)
- Text (Encrypted) (1)
- Time
- URL

Allow descriptions for each field type:

- 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", "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

Salesforce Setup - Details | Salesforce

SETUP > OBJECT MANAGER

Details

New Custom Field

Step 2. Enter the details

Field Label: Date

Field Name: Date

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

One formula syntax: Enclose text and picklist value API names in double quotes ('the_text'), include numbers without quotes (:123), show percentage as decimal (.10), and express date calculations in the standard format: (Today) + 7). To reference a field from a Custom Metadata type record use: \${CustomMetadata.Type__m.Field__c}

Help for this Page

Previous Next Cancel

Setup Home Object Manager

Gmail YouTube Maps Global NetAcad I... Edube Interactive...

Search Setup

Help for this Page

Previous Next Cancel

6.JPG Details | Salesforce - Google arun2 NM assignment 22:32

Salesforce Setup - Details | Salesforce

SETUP > OBJECT MANAGER

Details

New Custom Field

Step 4. Add to page layouts

Field Label: Date

Data Type: Date

Field Name: Date

Description:

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

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

Add Field Page Layout Name

Details Layout

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

Previous Save & New Save Cancel

Setup Home Object Manager

Gmail YouTube Maps Global NetAcad I... Edube Interactive...

Search Setup

Help for this Page

Previous Save & New Save Cancel

6.JPG Details | Salesforce - Google arun2 NM assignment 22:32

Screenshot of the Salesforce Setup interface showing the 'Fields & Relationships' section of the Object Manager.

The left sidebar shows navigation links: Details, Fields & Relationships (selected), 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, and Flow Triggers.

The main content area displays a list of field types:

- Checkbox
- Currency
- Date
- Date/Time
- Email
- Geolocation
- Number
- Percent
- Phone
- Picklist**
- Picklist (Multi-Select)
- Text
- Text Area
- Text Area (Long)
- Text Area (Rich)
- Text (Encrypted) (1)
- Time
- URL

Descriptions for each field type are provided on the right side of the list.

At the bottom right of the page are 'Next' and 'Cancel' buttons.

Screenshot of the Salesforce Setup interface showing the creation of a new custom field.

The left sidebar shows navigation links: Details, Fields & Relationships (selected), 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, and Flow Triggers.

The main content area is titled 'New Custom Field' and is on 'Step 2. Enter the details'. It includes the following fields:

- Field Label:** Gender
- Values:** Enter values, with each value separated by a new line
Male
Female
- Display values alphabetically, not in the order entered**
- Use first value as default value**
- Restrict picklist to the values defined in the value set**
- Field Name:** Gender
- Description:**
- Help Text:**

At the top right is a 'Help for this Page' button. At the bottom right are 'Previous', 'Next', and 'Cancel' buttons.

Screenshot of the Salesforce Setup interface showing the creation of a new custom field.

The left sidebar shows the navigation path: SETUP > OBJECT MANAGER > Details.

The main content area displays the "New Custom Field" page, Step 4 of 4.

Field Details:

Field Label	Gender
Data Type	Picklist
Field Name	Gender
Description	

Step 4. Add to page layouts:

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

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

Add Field Page Layout Name
 Details Layout

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

Buttons at the bottom: Previous, Save & New, Save, Cancel.

Screenshot of the Salesforce Setup interface showing the list of fields for the "Details" object.

The left sidebar shows the navigation path: SETUP > OBJECT MANAGER > Details.

The main content area displays the "Fields & Relationships" table.

Fields & Relationships: 8 Items, Sorted by Field Label

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

Buttons at the top right: Quick Find, New, Deleted Fields, Field Dependencies, Set History Tracking.

Buttons at the bottom: 8.JPG, 8.JPG, 8.JPG.

Screenshot of the Salesforce Setup interface showing the 'Tabs' configuration page.

The page title is 'Tabs' under the 'SETUP' tab. It displays the 'New Custom Object Tab' configuration screen.

Step 1. Enter the Details

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

Select an existing custom object or [create a new custom object now](#).
Object: **Details** (selected)
Tab Style: **Lightning**

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.
Splash Page Custom Link: **--None--**

Enter a short description.
Description: [Empty text area]

Buttons: **Next** (disabled), **Cancel**

Help for this Page

Left sidebar: tabs, User Interface, Rename Tabs and Labels, **Tabs** (selected).

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

Bottom status bar: Tabs | Salesforce - Google ... 9.JPG arun2 NM assignment

Screenshot of the Salesforce Setup interface showing the 'Custom Tabs' configuration page.

The page title is 'Custom Tabs' under the 'SETUP' tab. It displays the 'Custom Object Tabs' configuration screen.

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

Action	Label	Tab Style	Description
Edit Del	Colleagues	Building Block	
Edit Del	Departments	Credit card	
Edit Del	Details	Lightning	
Edit Del	Favourites	Diamond	
Edit Del	Efragrance_products	Lightning	
Edit Del	Inventories	CD/DVD	
Edit Del	our customers	Bottle	
Edit Del	Properties	Airplane	
Edit Del	retailers	Highway Sign	
Edit Del	Skincare_products	Star	
Edit Del	Students	Triangle	

New | What Is This?

Help for this Page

Left sidebar: tabs, User Interface, Rename Tabs and Labels, **Tabs** (selected).

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

Bottom status bar: Tabs | Salesforce - Google ... 9.JPG arun2 NM assignment

Screenshot of the Salesforce Setup interface showing the Flows list.

The left sidebar shows the navigation menu under "Setup":

- Apps
 - Lightning Bolt
 - Flow Category
- Process Automation
 - Automation Home (Beta)
 - Flows
 - Migrate to Flow
 - Paused And Failed Flow
 - Interviews
 - Process Builder
- Workflow Actions
 - Email Alerts
 - Field Updates
 - Outbound Messages
 - Send Actions
 - Tasks
- Workflow Rules
- Environments
- Monitoring

The main content area displays the "Flows" list:

Flow Label	Process Type	Active	Temp...	Package Status	Pack...	Last Modif...	Last Modified Date
Basic Approval Request	Flow Orchestration for CMS	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Book Appointment from Invitation	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Cancel Item Flow	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Change Case Owner to Incident Owner	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Close Change Request & Related Issues	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
CMS: Check Whether Any Step is Completed	Evaluation Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
CMS: Notify Content Author	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
CMS: Review Content	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
CMS: Submit Content for Review	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
CMS: Withdraw Review Request	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Consultantrec	Screen Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Unmanaged	Ajmal 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			

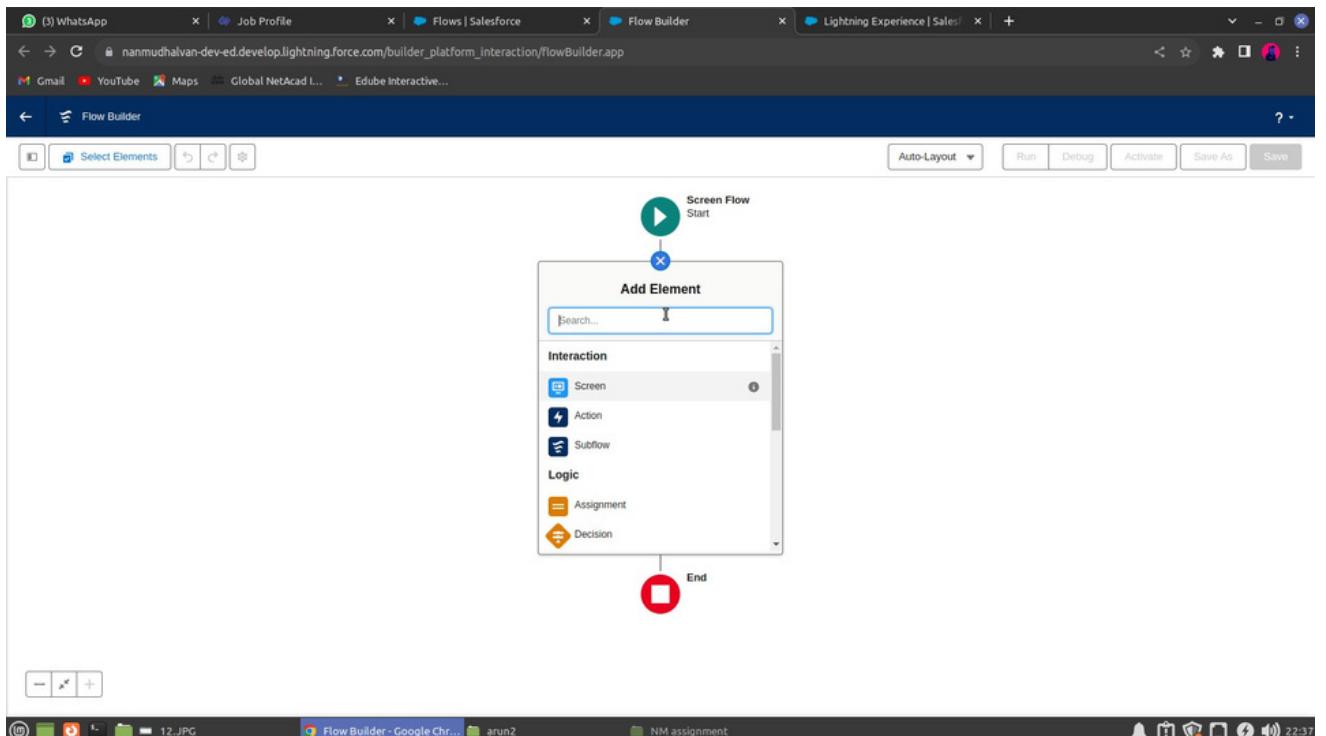
Screenshot of the Flow Builder interface showing the "New Flow" screen.

The left sidebar shows the "Elements" tab selected.

The main content area displays the "Core" section of the "All + Templates" list:

- Screen Flow
 - Guides users through a business process that's launched from Lightning pages, Experience Cloud sites, quick actions, and ...
- Record-Triggered Flow
 - Launches when a record is created, updated, or deleted. This autolaunched flow runs in the background.
- Schedule-Triggered Flow
 - Launches at a specified time and frequency for each record in a batch. 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.
- Autolaunched Flow (No Trigger)
 - Launches when invoked by Apex, processes, REST API, and more. 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.

At the bottom right of the list, there is a "Create" button.



New Screen

Components Fields

Name

First Name

Last Name

Email

you@example.com

Phone

Date

Label

* API Name

Require

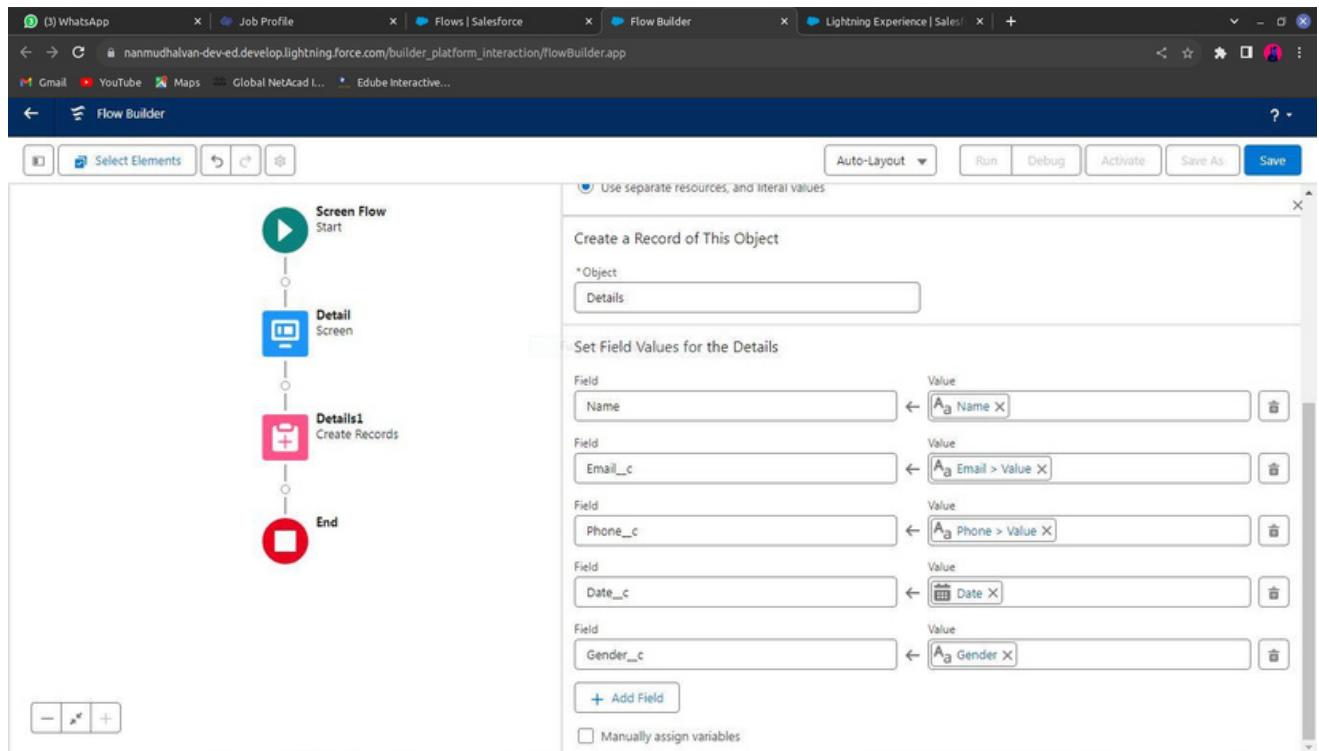
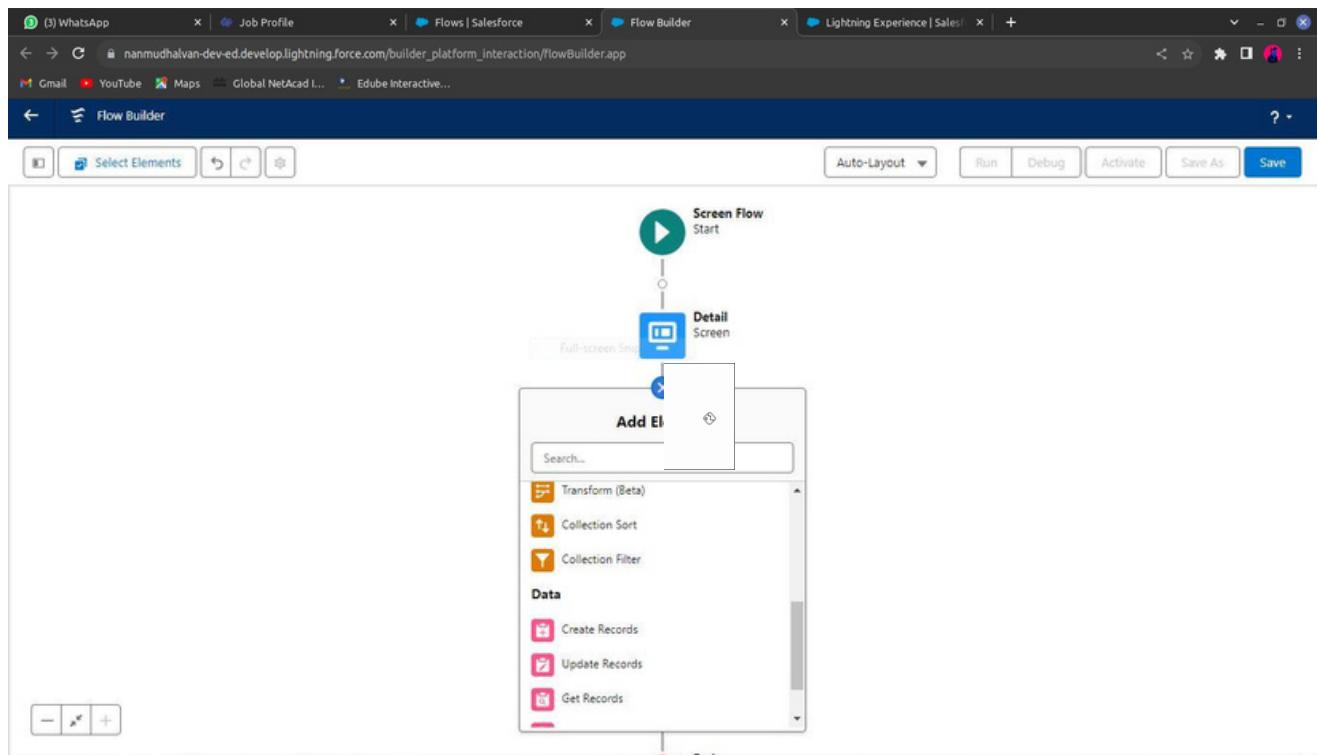
Default Value

dd/MM/yyyy

Get more on the AppExchange

Pause Previous Finish

Cancel Done





Details12

Name
Pandi

Email
karuthapandian007@gmail.com

Phone
1234567890

Date
18-Oct-2023

Gender
Male

[Next](#)

WhatsApp | Job Profile | Flows | Salesforce | Flow Builder | Lightning Experience | Sales

Search... ★ + ? ⚙ 🎯 📌 🎯 🎯

My-app College Department Details

Pandi

New Contact Edit New Opportunity

Related **Details**

Details Name Pandi	Owner Pandi
Email Karuthapandian007@gmail.com	Full-screen Snip
Phone 1234567890	
Date 18/10/2023	
Gender Male	

Created By
Pandi, 18/10/2023, 3:42 pm

Last Modified By
Pandi, 18/10/2023, 3:42 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.

The screenshot shows the Salesforce Lightning Experience interface. The top navigation bar includes tabs for WhatsApp, Job Profile, New Custom Object | Sales, and Lightning Experience | Sales. Below the navigation is a toolbar with links to Gmail, YouTube, Maps, Global NetAcad..., and Edube Interactive... A search bar labeled "Search Setup" is also present.

The main content area is titled "New Custom Object". It displays a "Custom Object Definition Edit" form. The "Custom Object Information" section contains fields for "Label" (set to "Account") and "Plural Label" (set to "Accounts"). There is also a checkbox for "Starts with vowel sound". The "Object Name" field is set to "Account". The "Description" field is empty. Under "Context-Sensitive Help Setting", the radio button for "Open the standard Salesforce.com Help & Training window" is selected. The "Content Name" dropdown is set to "None".

A message at the top of the form states: "Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles." It includes links for "Tell me more!" and "Don't show this message again".

The screenshot shows the Salesforce Tabs setup interface. The left sidebar is titled 'User Interface' and includes sections for 'Rename Tabs and Labels' and 'Tabs'. A search bar at the top right says 'Search Setup'. The main content area is titled 'Tabs' and shows 'Step 1. Enter the Details'. It asks to choose a custom object or create a new one, with 'Management' selected. Below that, it asks to choose a home page custom link, with 'None' selected. There's a large text input field for a short description. At the bottom right are 'Next' and 'Cancel' buttons.

Screenshot of the Salesforce Setup interface showing the 'Tabs' page.

The page title is 'Tabs' under the 'Custom Object Tabs' section. It lists 13 tabs with their labels and styles:

Action	Label	Tab Style	Description
Edit Del	Coffees	Building Block	
Edit Del	Departments	Credit card	
Edit Del	Details	Lightning	
Edit Del	Favourites	Diamond	
Edit Del	Fragrance_products	Lightning	
Edit Del	Inventories	CD/DVD	
Edit Del	Managements	Camera	
Edit Del	our_customers	Bottle	
Edit Del	Properties	Airplane	
Edit Del	retailers	Highway Sign	
Edit Del	Skincare_products	Star	
Edit Del	Students	Triangle	

The 'Web Tabs' section shows 'No Web Tabs have been defined'.

Screenshot of the Salesforce Lightning Experience interface showing the 'Management' tab.

The page title is 'Management' under the 'Recently Viewed' section. It displays a message: 'You haven't viewed any Management recently. Try switching list views.'

WhatsApp | Job Profile | Flows | Salesforce | Flow Builder | Lightning Experience | Salesf...

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

Cloud Search Setup Home Object Manager

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

Profiles

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 Page 1 of 1

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Cloud Search Setup Home Object Manager

Setup Home Object Manager

Hyperforce Assistant

Users Profiles

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Feature Settings

Data.com Prospector Preferences Prospector Users Functions

Marketing Lead Processes

Sales Products Asset Settings

Profiles

SETUP Profiles

Profile Edit Manager

Set the permissions and page layouts for this profile.

Profile Edit

Name	Save	Save & New	Cancel
Manager			
User License	Salesforce Platform	Custom Profile <input checked="" type="checkbox"/>	
Description			

Custom App Settings

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

Service Provider Access

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

Search Setup

Setup Home Object Manager

Profiles

Contact Point Consents

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

Contact Point Emails

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

Streaming Channels

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

User External Credentials

Full	Read	Create	Edit	Delete	View All	Modify All
<input type="checkbox"/>						

Custom Object Permissions

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

WhatsApp Job Profile Flows | Salesforce Flow Builder Lightning Experience | Sales...

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

Search Setup

Setup Home Object Manager

Profiles

Profile Manager

Full-screen Snp Help for this Page

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.

Login IP Ranges | Enabled Apex Class Access | Enabled Visualforce Page Access | Enabled External Data Source Access | Enabled Named Credential Access | Enabled External Credential Principal Access | Enabled Custom Metadata Type Access | Enabled Custom Setting Definitions Access | Enabled Flow Access | Enabled Service Presence Status Access | Enabled Custom Permissions

Profile Detail

Name: Manager	Custom Profile: <input checked="" type="checkbox"/>
User License: Salesforce Platform	
Description:	
Created By: Arun_J_ 18/10/2023, 3:47 pm	Modified By: Arun_J_ 18/10/2023, 3:48 pm

Page Layouts

Standard Object 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

WhatsApp Job Profile Flows | Salesforce Flow Builder Lightning Experience | Sales...

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

Learn more

Cloud Search Setup Object Manager

Setup Home Object Manager

user

v Users

- Permission Set Groups
- Permission Sets
- Profiles
- Public Groups
- Queues
- Roles
- User Management Settings
- Users**
- Feature Settings
- Data.com
- Prospector Users
- Service
- Embedded Service
- Messaging for In-App and Web User

SETUP Users

New User

User Edit

General Information

First Name: manager
Last Name: 1
Alias: m1
Email: manager aaa@gmail.com
Username: manager.aaa@gmail.com
Nickname: User1697624338709764377
Title:
Company:
Department:
Division:

Role: Marketing Team
User License: Salesforce Platform
Profile: Manager
Active: Marketing User:
Offline User: Knowledge User:
Flow User: Service Cloud User:
Site.com Contributor User: Site.com Publisher User:
WDC User:

Help for this Page

Required Information

WhatsApp Job Profile Flows | Salesforce Flow Builder Lightning Experience | Sales...

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

Learn more

Cloud Search Setup Object Manager

Setup Home Object Manager

user

v Users

- Permission Set Groups
- Permission Sets
- Profiles
- Public Groups
- Queues
- Roles
- User Management Settings
- Users**
- Feature Settings
- Data.com
- Prospector Users
- Service
- Embedded Service
- Messaging for In-App and Web User

SETUP Users

New User

User Edit

General Information

First Name: manager
Last Name: 2
Alias: m2
Email: managerxyz. xyz@gmail.com
Username: managerxyz. xyz@gmail.com
Nickname: User1697624453758508865
Title:
Company:
Department:
Division:

Role: Marketing Team
User License: Salesforce
Profile: Solution Manager
Active: Marketing User:
Offline User: Knowledge User:
Flow User: Service Cloud User:
Site.com Contributor User: Site.com Publisher User:
WDC User:

Help for this Page

Required Information

WhatsApp Job Profile Flows | Salesforce Flow Builder Lightning Experience | Sales!

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

Search Setup

Setup Home Object Manager

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

1-25 of 30 0 Selected Page 1 of 2

WhatsApp Job Profile Flows | Salesforce Flow Builder Lightning Experience | Sales!

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Search Setup

Setup Home Object Manager

Permission Sets

Permission Set manager12

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

Permission Set Overview

Description	API Name	manager12
License	Namespace Prefix	
Session Activation Required	Created By	Anu J 18/10/2023, 3:52 pm
Permission Set Groups Added To	Last Modified By	Anu J 18/10/2023, 3:52 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

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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

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

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Functions

Sales

Accounts

Person Accounts

Salesforce Scheduler

Assignment Policies

Salesforce Scheduler

Select Users to Assign

All Users

1 item selected

Full Name ↑

Full Name	Role	Profile		
Pandi	AJ	arunj@123gmail.com	<input checked="" type="checkbox"/>	System Administrator
Chatter Expert	Chatter	chatty.00d5j00000dq4hgeat.t3yy9pn6v4mm@chatters...	<input checked="" type="checkbox"/>	Chatter Free User
consumer_1	c1	cons143@gmail.com	<input checked="" type="checkbox"/>	Marketing Team consumer
Integration User	integ	integration@00d5j00000dq4hgeat.com	<input checked="" type="checkbox"/>	Analytics Cloud Integration Us...
manager_1	m1	managerabc.abc@gmail.com	<input checked="" type="checkbox"/>	Marketing Team Manager

Cancel Next

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Search Setup

Setup Home Object Manager

Hyperforce Assistant

Lightning Experience Transition Assistant

Users

Permission Set Groups

Permission Sets

Feature Settings

Digital Experiences

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Functions

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Accounts

Person Accounts

Salesforce Scheduler

Assignment Policies

Salesforce Scheduler

Select an Expiration Option For Assigned Users

No expiration date

Specify the expiration date

Full-screen Snip

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

The screenshot shows the 'Select an Expiration Option For Assigned Users' dialog box. It contains a table with one row of data: 'manager 1' assigned to 'Marketing Team' with profile 'Manager', active status, and using 'Salesforce Platform' license. The 'Expires On' column shows 'Never Expires'. There are buttons for 'Cancel', 'Back', and 'Assign' at the bottom right. The background shows the Salesforce setup interface with a sidebar containing various configuration tabs like 'Permission Sets'.

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Users

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Sales

Accounts

Person Accounts

Salesforce Scheduler

Assignment Policies

Salesforce Scheduler

... > SETUP > PERMISSION SET 'MANAGER12'

manager12

Current Assignments

Add Assignment

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

The screenshot shows the 'Current Assignments' page for the 'MANAGER12' permission set. It displays a table with one row of data: 'manager 1' assigned to 'Marketing Team' with profile 'Manager', active status, and using 'Salesforce Platform' license. There is a link to the previous screen ('... > SETUP > PERMISSION SET 'MANAGER12') and a 'Add Assignment' button. The background shows the Salesforce setup interface with a sidebar containing various configuration tabs like 'Permission Sets'.

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

Screenshot of the Salesforce Setup interface showing the "New Custom Object" page.

Custom Object Definition Edit

Custom Object Information

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

Label: Bank (Example: Account)

Plural Label: Banks (Example: Accounts)

Starts with vowel sound:

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

Object Name: Bank (Example: Account)

Description:

Content Name:

Contest-Sensitive Help Setting:

Open the standard Salesforce.com Help & Training window
 Open a window using a Visualforce page

Enter Record Name Label and Format

The Record Name appears in name 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.

Help for this Page 

Save Save & New Cancel

Search Setup

Setup Home Object Manager

(4) WhatsApp Job Profile New Custom Object | Sales... Lightning Experience | Sales... + nanmudhalvan-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new Gmail YouTube Maps Global NetAcad I... Edube Interactive... +

Screenshot of the Salesforce Setup interface showing the "New Custom Object Tab" configuration page.

Step 1. Enter the Details

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

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

Object: Bank

Tab Style: Castle

(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:

Help for this Page 

Next Cancel

tabs User Interface Rename Tabs and Labels Tabs Didn't find what you're looking for? Try using Global Search.

Search Setup

Setup Home Object Manager

(4) WhatsApp Job Profile Home | Salesforce - Google... arun4 + nanmudhalvan-dev-ed.develop.lightning.force.com/lightning/setup/customTabs/page?address=%2Fsetup%2Fui%2FobjectCustomTabWizard.jsp%3FretURL%3D%252F01i5h00000jo7D%253Fset... Gmail YouTube Maps Global NetAcad I... Edube Interactive... +

Screenshot of the Salesforce Object Manager setup page for the 'Bank' object.

Details

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

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**

URL: https://nanmudhalvan-dev-ed.lightning.force.com/lightning/setup/ObjectManager/015h000000j07D/Details/view

Screenshot of the Salesforce New Custom Object setup page.

New Custom Object

Custom Object Definition Edit

Custom Object Information

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

Label: Customer (Example: Account)
Plural Label: Customers (Example: Accounts)
Starts with vowel sound:

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

Object Name: Customer (Example: 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 many sources, like 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.

URL: https://nanmudhalvan-dev-ed.lightning.force.com/lightning/setup/ObjectManager/new

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

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 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 pop-up 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 pop-up 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.

Next Cancel

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

New Relationship

Step 6 of 6

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

Profiles

Standard Platform User

Profile Detail

Name: Standard Platform User
User License: Salesforce Platform
Created By: salesforce.com, inc., 17/10/2023, 10:41 am
Modified By: Anuj, 18/10/2023, 3:34 pm

Page Layouts

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

Help for this Page

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

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Search Setup

Setup Home Object Manager

Profiles

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

Existing Profile: Standard Platform User
User License: Salesforce Platform
Profile Name: Management

Save Cancel

Help for this Page

Hyperforce Assistant

Users

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Mass Transfer Approval Requests

Feature Settings

Data.com

Prospector Preferences

Prospector Users

Functions

Marketing

Lead Processes

Sales

Products

Asset Settings

Screenshot of the Salesforce Setup interface showing the 'Profiles' management screen.

The left sidebar navigation includes:

- Hyperforce Assistant
- Users
 - Profiles (selected)
- Data
 - Mass Transfer Approval Requests
- Feature Settings
- Data.com
 - Prospector Preferences
 - Prospector Users
- Functions
- Marketing
 - Lead Processes
- Sales
 - Products (selected)
- Asset Settings

The main content area displays the 'Management' section of the 'Profile Edit' screen for the 'Management' profile. The profile is assigned to the 'Salesforce Platform' license and is a 'Custom Profile'. Under 'Custom App Settings', the 'My-app (Myapp)' app is set as the default. The 'Service Provider Access' section is collapsed.

Screenshot of the Salesforce Setup interface showing the 'Profiles' management screen.

The left sidebar navigation includes:

- Hyperforce Assistant
- Users
 - Profiles (selected)
- Data
 - Mass Transfer Approval Requests
- Feature Settings
- Data.com
 - Prospector Preferences
 - Prospector Users
- Functions
- Marketing
 - Lead Processes
- Sales
 - Products (selected)
- Asset Settings

The main content area displays the expanded 'Management' section of the 'Profile Edit' screen. It shows various permissions and settings:

- Contact Point Consents: Checkmarks in columns 1, 2, 3, 4, and 5 for rows 1 and 2.
- Contact Point Emails: Checkmarks in columns 1, 2, 3, 4, and 5 for rows 1 and 2.
- User External Credentials: Checkmarks in columns 1, 2, 3, 4, and 5 for rows 1 and 2.
- Custom Object Permissions: Grid showing access levels for Bank, College, Customer, Department, Details, Management, and other objects across Read, Create, Edit, Delete, View All, and Modify All columns.
- Session Settings: Session Times Out After is set to '2 hours of inactivity'. Session Security Level Required at Login is set to '--None--'.
- Password Policies: User passwords expire in '90 days'. Enforce password history is set to '3 passwords remembered'.

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Cloud Search Setup Object Manager

Setup Home Object Manager

Q user

v 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**

Cloud Search Setup

SETUP Users

New User

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:

Help for this Page

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Cloud Search Setup Object Manager

Setup Home Object Manager

Q prof

v Users

Profiles

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

Cloud Search Setup

SETUP Profiles

Sales Manager

Set the permissions and page layouts for this profile.

Profile Edit

Name: Sales Manager
User License: Salesforce Platform
Description:

Custom Profile:

Custom App Settings

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

Service Provider Access

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Search Setup

Setup Home Object Manager

Q prof

Users Profiles

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

Profiles

Contact Point Addresses Contact Point Consents Contact Point Emails

Sellers Streaming Channels User External Credentials

Custom Object Permissions

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

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

User passwords expire in: 90 days

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Search Setup

Setup Home Object Manager

Q prof

Users Profiles

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

Users

New User

User Edit

General Information

First Name: manager	Role: <None Specified>
Last Name: sales	User License: Partner App Subscription
Alias: msale	Profile: Partner App Subscription User
Email: managersales.123@gmail.com	Active: <input checked="" type="checkbox"/>
Username: managersales.123@gmail.com	Marketing User: <input type="checkbox"/>
Nickname: User1697625227851209885	Offline User: <input type="checkbox"/>
Title:	Knowledge User: <input type="checkbox"/>
Company:	Flow User: <input type="checkbox"/>
Division:	Service Cloud User: <input type="checkbox"/>
	Site.com Contributor User: <input type="checkbox"/>
	Site.com Publisher User: <input type="checkbox"/>
	WDC User: <input type="checkbox"/>

Setup | Home | Object Manager

Permission Sets

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

Action	Permission Set Label	Description	License
<input type="checkbox"/>	Buyer	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"/>	C360_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 ce...	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	Lets users create, read, edit, and delete locations, subloc...	Salesforce
<input type="checkbox"/>	Facility_Manager		Facility Manager

Setup | Home | Object Manager

Permission Sets

managerbanksales

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

Permission Set Overview

Description	API Name	Namespace Prefix
License	managerbanksales	
Session Activation Required		Created By
Permission Set Groups Added To	0	Last Modified By

Apps

- Assigned Apps**
Settings that specify which apps are visible in the app menu
- Assigned Connected Apps**
Settings that specify which connected apps are visible in the app menu
- Object Settings**
Permissions to access objects and fields, and settings such as tab availability
- App Permissions**
Permissions to perform app-specific actions, such as "Manage Call Centers"
- Apex Class Access**

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Salesforce Scheduler

Assignment Policies

Salesforce Scheduler

SETUP

Permission Sets

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

Save Cancel

Accounts

Object Permissions

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

Field Permissions

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

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Person Accounts

Salesforce Scheduler

Assignment Policies

Salesforce Scheduler

All Users

1 item selected

Search this list...

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

Cancel Next

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Cloud My-app Recently Viewed College Department Details Management Customers Bank

Customers Recently Viewed ▾

0 items • Updated a few seconds ago

Total Life Time Value Name

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

Full-screen Snip