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Salesforce Developer(Course)
Assignment

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Year & Dep : IV Year & CSE
Batch : 2024
Zone no : Zone 8

1.Create a Master-Detail Relationship between two Custom objects and also create a Roll Up Summary Field to Calculate total number of records.

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:

Content-Sensitive Help Setting: Open the standard Salesforce.com Help & Training window
 Open a window using a Visualforce page

Content Name:

Enter Record Name Label and Format

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

Record Name: College Name (Example: Account Name)

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:

Content-Sensitive Help Setting: Open the standard Salesforce.com Help & Training window
 Open a window using a Visualforce page

Content Name:

Enter Record Name Label and Format

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

Help for this Page

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

Object Manager - Step 4 of 4

Step 4. Add custom related lists

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

Help for this Page

Setup Home Object Manager

Search Setup

College

Help for this Page

Previous Save & New Save Cancel

20.59

Screenshot of the Salesforce Tabs setup page.

Tabs - Step 1 of 1

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.

Custom Object Tabs

Action	Label	Tab Style	Description
Edit Del	Colleges	Building Block	
Edit Del	Departments	Credit card	
Edit Del	Employees	Diamond	
Edit Del	Expenditure 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	Mail	
Edit Del	Students	Triangle	

Web Tabs

Action	Label	Tab Style	Description
New	What Is This?		

Help for this Page

Setup Home Object Manager

Search Setup

Custom Tabs

Help for this Page

Custom Object Tabs

New What Is This?

Action Label Tab Style Description

Edit | Del Colleges Building Block

Edit | Del Departments Credit card

Edit | Del Employees Diamond

Edit | Del Expenditure 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 Mail

Edit | Del Students Triangle

New What Is This?

Web Tabs

New What Is This?

22.21

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

The left sidebar shows the following navigation:

- 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
- Flow Triggers

The main content area displays various field types with 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 pop-up calendar.
- Date/Time: Allows users to enter a date and time, or pick a date from a pop-up calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
- Email: Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
- Geolocation: Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
- Number: Allows users to enter any number. Leading zeros are removed.
- Percent: Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.
- Phone: Allows users to enter any phone number. Automatically formats it as a phone number.
- Picklist: Allows users to select a value from a list you define.
- Picklist (Multi-Select): Allows users to select multiple values from a list you define.
- Text: Allows users to enter any combination of letters and numbers.
- 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.

At the bottom right of the main content area are 'Next' and 'Cancel' buttons.

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

The left sidebar shows the same navigation as the previous screenshot.

The main content area is titled 'Step 2. Enter the details' and includes the following fields:

- Field Label: (with a small info icon)
- Field Name: (with a small info icon)
- Description: (empty text area)
- Help Text: (empty text area)
- 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 (with a small info icon)

Below these settings is a 'Default Value' section with a 'Show Formula Editor' button. A tooltip for the formula editor explains its syntax: "Use formula syntax. Enclose text and picklist value with names in double quotes. '{!the_field}' include numbers without quotes. {!PI} show percentages as decimal. {!TODAY} and express date calculations in the standard format: {!TODAY} + 7. To reference a field from a Custom Metadata type record use: \${CustomMetadataType__r.records[0].field__c}"

At the top right of the configuration page are 'Step 2 of 4', 'Previous', 'Next', and 'Cancel' buttons.

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

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

The main content area displays a list of field types:

Field Type	Description
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 pop-up calendar.
Date/Time	Allows users to enter a date and time, or pick a date from a pop-up calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
Email	Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
Geolocation	Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
Number	Allows users to enter any number. Leading zeros are removed.
Percent	Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.
Phone	Allows users to enter any phone number. Automatically formats it as a phone number.
Picklist	Allows users to select a value from a list you define.
Picklist (Multi-Select)	Allows users to select multiple values from a list you define.
Text	Allows users to enter any combination of letters and numbers.
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.

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

Screenshot of the 'New Custom Field' creation wizard for the 'Department' object.

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

The main content area is titled 'New Custom Field' and is on 'Step 2. Enter the details'.

The form fields are:

Field Label	Dept_No.
Field Name	Dept_No
Description	(empty)
Help Text	(empty)

Below the form:

- Required:** Always require a value in this field in order to save a record
- Auto add to custom report type:** Add this field to existing custom report types that contain this entity

Default Value: Show Formula Editor

Use formula editor. Enclose text and picklist value with quotes in double quotes ("Dept_No"). Include modulus without quotes (%). Shows percentages as decimal (.10), and performs date calculations in the standard format (Today() * 7). To reference a field from a Custom-Metadata type record use: \$CustomMetadata.Type__mdt.AliasName\$Field__c

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

(1) WhatsApp X Job Profile X Recently Viewed | our_customers X Department | Salesforce +

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

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

Fields & Relationships 7 Items, Sorted by Field Label

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

Quick Find New Deleted Fields Field Dependencies Set History Tracking

17.JPG Department | Salesforce - linux arun1 22:23

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

Full-screen Snp

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 readonly 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 readonly 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.

Next Cancel

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

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

Previous Save & New Save Cancel

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

Full-screen Setup

Select one of the data types below.

None Selected

Auto Number

Formula

Roll-Up Summary

Lookup Relationship

Master-Detail Relationship

External Lookup Relationship

Checkbox

Currency

Date

File

Long Text

Long Text (Rich Text)

Number

Percent

Phone

Text

URL

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

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

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

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

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

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

Allows users to select a True (checked) or False (unchecked) value.

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

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

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

Cloud icon

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

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)		

Cloud icon

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 appmitems - 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	✓

<https://na0.salesforce-dev-ed.lightning.force.com/lightning/app/#/setup/nav/ribbonMenu/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

Setup and Personalization

Setup Experience

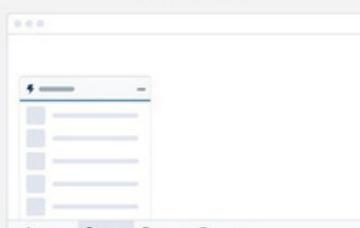
App Personalization Settings

Back **Next**

ID	Name	Label	Description	Created Date	Type	Action
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	Action
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: 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 ✓

New Lightning App

Available Profiles

sy

Salesforce API Only System Integrations

Selected Profiles

System Administrator

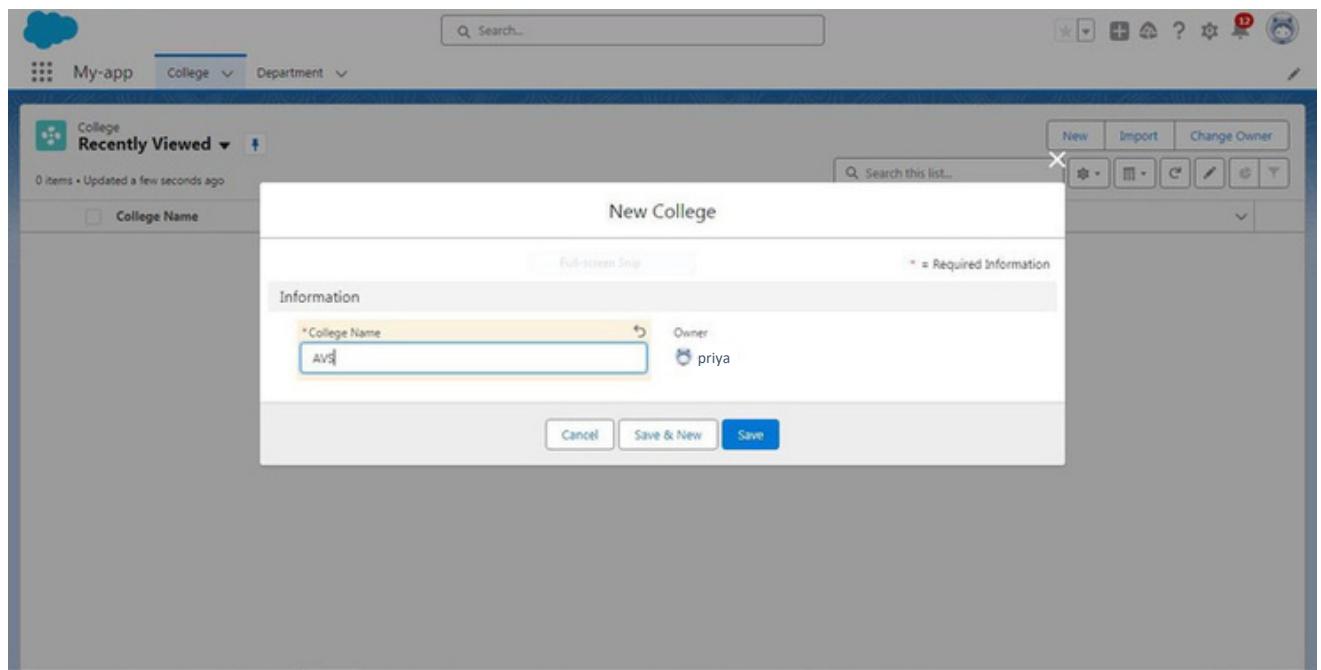
Save & Finish

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 ✓



This screenshot shows a CRM 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 header, a card displays information for a college named "AVS". The card includes fields for "College Name" (AVS), "Total Count" (0), and two timestamped activity logs: "Created By" (priya) on 18/10/2023 at 3:28 pm and "Last Modified By" (priya) on the same date and time. There are tabs for "Related" and "Details", with "Details" being the active tab.

This screenshot shows a CRM application interface with a modal window titled "New Department". The window is part of a "Department" module, indicated by the dropdown menu in the top left. The modal has a "Recently Viewed" sidebar on the left. The main form is titled "New Department" and contains an "Information" section with the following fields: "Department Name" (CSE), "Email" (cse@gmail.com), "Phone" (1234567899), and "College" (AVS). A note at the top right says "* = Required Information". At the bottom of the form are three buttons: "Cancel", "Save & New", and "Save".

My-app College Department

Department CSE was created.

Related Details

Department Name
CSE

Email
cse@gmail.com

Phone
1234567899

College
AVS

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

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

Full-screen Snp

New Contact Edit New Opportunity

My-app College Department

College AVS

Related Details

College Name
AVS

Total Count
1

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

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

Owner
 priya

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 creation of a new custom object named "Details".

The "Custom Object Definition Edit" section includes:

- Custom Object Information:** Label: Details, Plural Label: Details, Starts with vowel sound:
- Object Name:** Object Name: Details, Example: Account
- Description:** A large text area for entering a description.
- Content-Sensitive Help Setting:** Open the standard Salesforce.com Help & Training window (selected).
- Content Name:** None

A message at the top 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." Buttons for Save, Save & New, and Cancel are available.

The browser address bar shows: nanmudhalvan-dev-ed.lightning.force.com/lightning/setup/ObjectManager/new

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

The left sidebar lists various configuration options under "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 "Details" section displays the following settings:

- Description:** A text input field.
- API Name:** Details_c
- Custom:** ✓
- Singular Label:** Details
- Plural Label:** Details
- Enable Reports:** A checkbox.
- Track Activities:** A checkbox.
- Track Field History:** A checkbox.
- Deployment Status:** Deployed
- Help Settings:** Standard salesforce.com Help Window

Buttons for Edit and Delete are located in the top right corner.

The browser address bar shows: nanmudhalvan-dev-ed.lightning.force.com/lightning/setup/ObjectManager/015h000000j0s1/Details/View

WhatsApp | Job Profile | Details | Salesforce | Lightning Experience | Sales| +

nanmudhalvan-dev-ed.lightning.force.com/lightning/setup/ObjectManager/011sh000000j05/FieldsAndRelationships/view

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

Setup Home Object Manager

SETUP > OBJECT MANAGER Details

Fields & Relationships
4 items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Details Name	Name	Text(80)		✓
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓

Quick Find New Deleted Fields Field Dependencies Set History Tracking

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

7.JPG Details | Salesforce - Google arun2 NM assignment

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nanmudhalvan-dev-ed.lightning.force.com/lightning/setup/ObjectManager/011sh000000j05/FieldsAndRelationships/new

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Setup Home Object Manager

SETUP > OBJECT MANAGER Details

Fields & Relationships

- Lookup Relationship
- Master Detail Relationship
- External Lookup Relationship
- Checkbox
- Currency
- Date
- DateTime
- Email
- Geolocation
- Number
- Percent
- Phone
- Picklist
- Picklist (Multi-Select)
- Text

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 summarize the detail records. The master object is the source of the values in the list.

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

Allows users to select a True (checked) or False (unchecked) value.

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

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

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.

7.JPG Details | Salesforce - Google arun2 NM assignment

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Cloud Setup Home Object Manager Search Setup

SETUP > OBJECT MANAGER Details

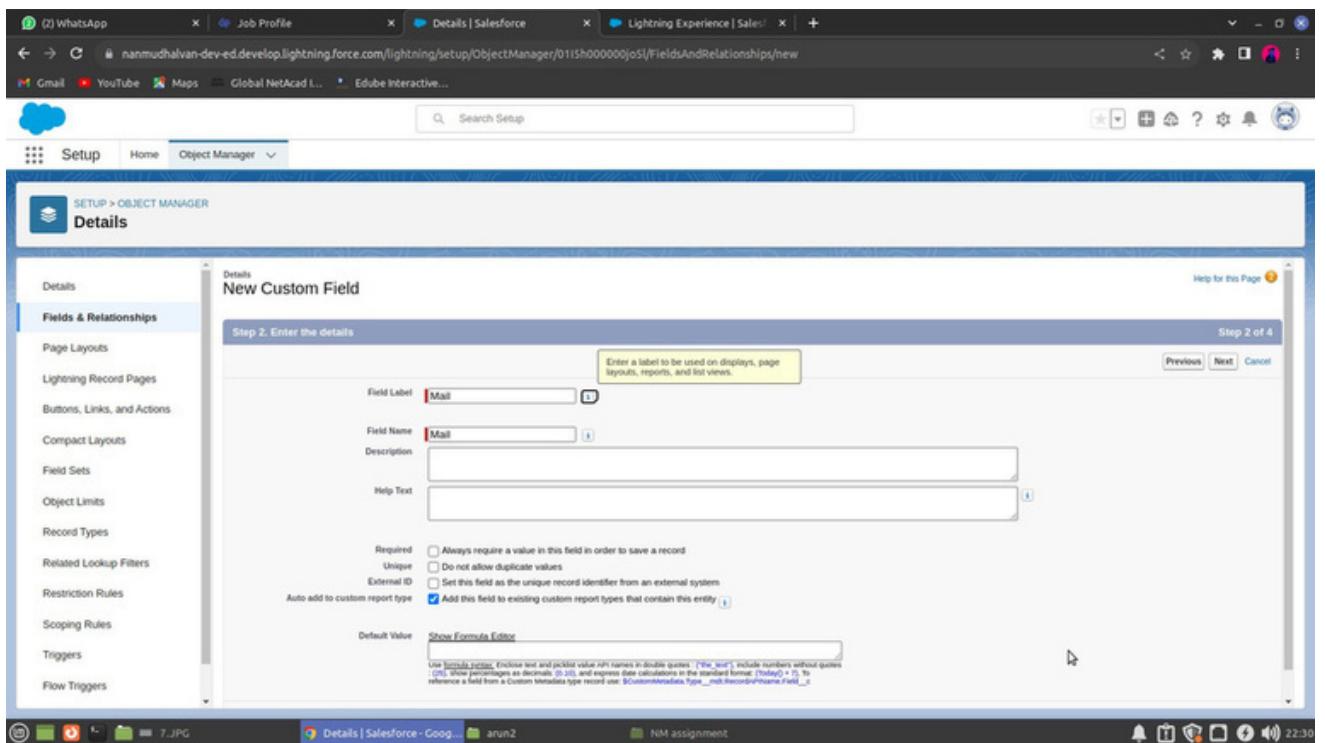
Details New Custom Field Step 2 of 4

Field Label: Mail
Field Name: 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

Help for this Page

Previous Next Cancel

7.JPG Details | Salesforce - Google arun2 NM assignment 22:30



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Cloud Setup Home Object Manager Search Setup

SETUP > OBJECT MANAGER Details

Details New Custom Field Step 4 of 4

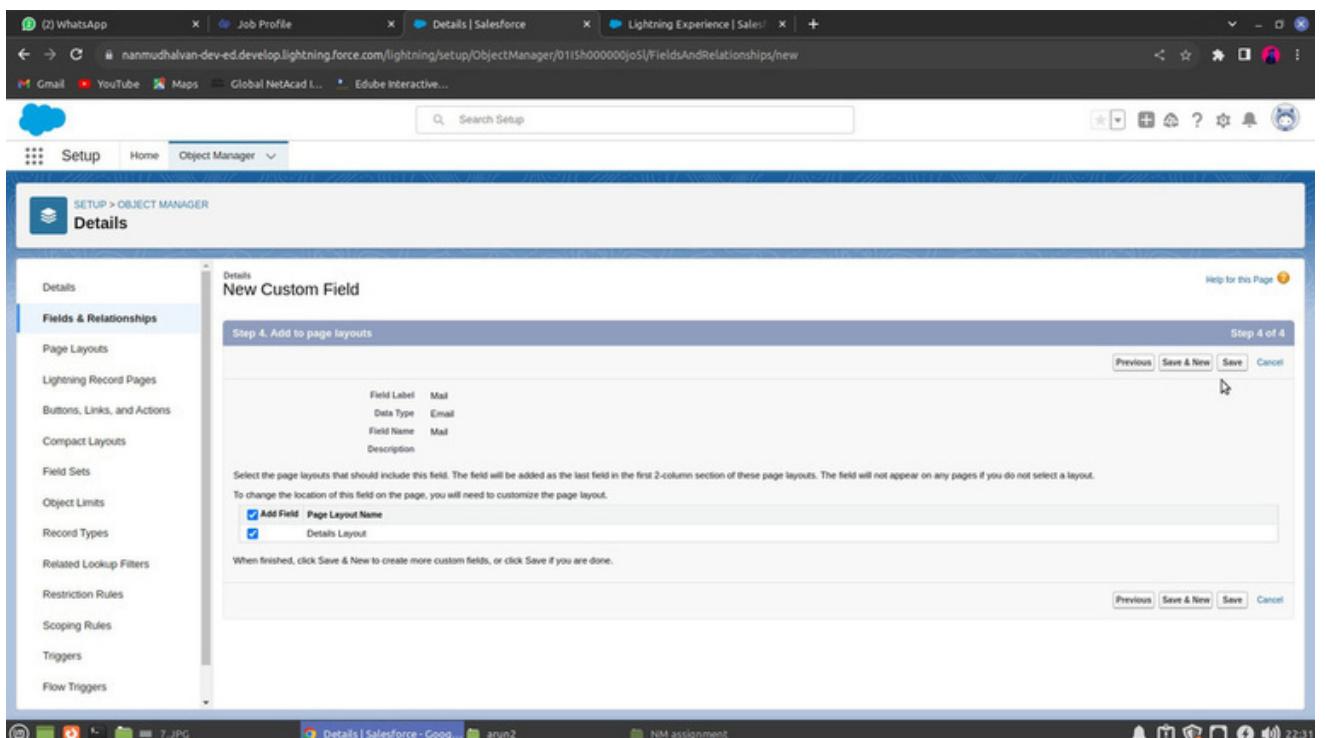
Field Label: Mail
Data Type: Email
Field Name: Mail
Description:

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

7.JPG Details | Salesforce - Google arun2 NM assignment 22:31



Screenshot of the Salesforce Object Manager - Details page for a custom object.

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 with 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, '2%' and automatically adds the percent sign to the number.
- Phone: (Selected) 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.
- TextArea: Allows users to enter up to 255 characters on separate lines.
- TextArea (Long): Allows users to enter up to 131,072 characters on separate lines.
- TextArea (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 - Details page for a custom object, 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 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: 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

Help text for Default Value:

Use formula editor. Enclose text and picklist value API names in double quotes ('The word'), include numbers without quotes ([12]), show percentages as decimal (.123), and express date calculations in the standard format (Today() + 7). To reference a field from a Custom Metadata type record use: \${CustomMetadataType__r.RecordId}Phone__c

Buttons at the top right: Help for this Page, Step 2 of 4, Previous, Next, Cancel.

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

Salesforce Setup Page - Details of a New Custom Field

The page shows the 'Details' tab selected under 'Fields & Relationships'. The field being created is named 'Phone' with a label 'Phone'. It is set to be added to the 'Details Layout'. The status bar indicates 'Step 4 of 4'.

Details of a 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

Salesforce Setup Page - Fields & Relationships

The page shows the 'Fields & Relationships' tab selected under 'Fields & Relationships'. A list of field types is shown with 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 locations. Includes latitude and longitude components, and can be used to calculate distance.
- Number: Allows users to enter any number. Leading zeros are removed.
- Percent: Allows users to enter a percentage number, for example, '17' 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 formatted text, add images and links. Up to 131,072 characters on separate lines.
- Text Area (Rich): Allows users to enter any combination of letters and numbers and store them in encrypted form.
- Text (Encrypted): 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.
- Time: Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.
- URL:

Salesforce Setup - Details | Object Manager

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

Use formula editor. Enclose text and picklist value API names in double quotes ('the_text'), include numbers without quotes ('123'), show percentages as decimal (.123), 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}

Help for this Page

Previous Next Cancel

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

Salesforce Setup - Details | Object Manager

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

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

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:

- Details: 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.
- 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

Each field type has a brief description below it.

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

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

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 "Step 2. Enter the details" and shows the "New Custom Field" configuration.

Form fields include:

- Field Label:** Gender
- Values:**
 - Use global picklist value set
 - Enter values, with each value separated by a new line
- Value Input:** Male
Female
- Additional Options:**
 - Display values alphabetically, not in the order entered
 - Use first value as default value (1)
 - Restrict picklist to the values defined in the value set (1)
- Field Name:** Gender
- Description:**
- Help Text:**

At the top right is a "Help for this Page" link, and at the bottom right are "Previous", "Next", and "Cancel" buttons.

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nanmudhalvan-dev-ed.lightning.force.com/lightning/setup/ObjectManager/015h000000j0S/FieldsAndRelationships/new

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Cloud Search Setup Home Object Manager

SETUP > OBJECT MANAGER Details

Details

New Custom Field

Step 4. Add to page layouts Step 4 of 4

Field Label: Gender
Data Type: Picklist
Field Name: Gender
Description:

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

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

Add Field Page Layout Name
 Details Layout

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

Previous Save & New Save Cancel

WhatsApp | Job Profile | Details | Salesforce | Lightning Experience | Sales| +

nanmudhalvan-dev-ed.lightning.force.com/lightning/setup/ObjectManager/015h000000j0S/FieldsAndRelationships/view

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Cloud Search Setup Home Object Manager

SETUP > OBJECT MANAGER Details

Fields & Relationships

8 items. Sorted by Field Label

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

Quick Find New Deleted Fields Field Dependencies Set History Tracking

Salesforce Setup - Tabs

New Custom Object Tab

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**

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:

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.

WhatsApp Job Profile Tabs | Salesforce Lightning Experience | Sales/ +

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Search Setup

Setup Home Object Manager

22:35

Salesforce Setup - Tabs

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.

Custom Object Tabs

Action	Label	Tab Style	Description
Edit Del	Collections	Building Block	
Edit Del	Debts	Credit card	
Edit Del	Details	Lightning	
Edit Del	Favorites	Diamond	
Edit Del	Expense 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

_tabs

User Interface

Rename Tabs and Labels

Tabs

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

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Search Setup

Setup Home Object Manager

22:36

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nanmudhalvan-dev-ed.lightning.force.com/lightning/setup/flows/home

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Cloud Setup Home Object Manager

Search Setup

Flow Trigger Explorer New Flow

Flow Definitions All Flows

35 items • Sorted by Flow Label • Filtered by All flow definitions • Updated a few seconds ago

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

10.JPG Flows | Salesforce - Google Chrome arun2 NM assignment 22:37

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

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

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Flow Builder

New Flow

Core All + Templates

Screen Flow
Guides users through a business process that's launched from Lightning pages, Experience Cloud sites, quick actions, and ...

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.

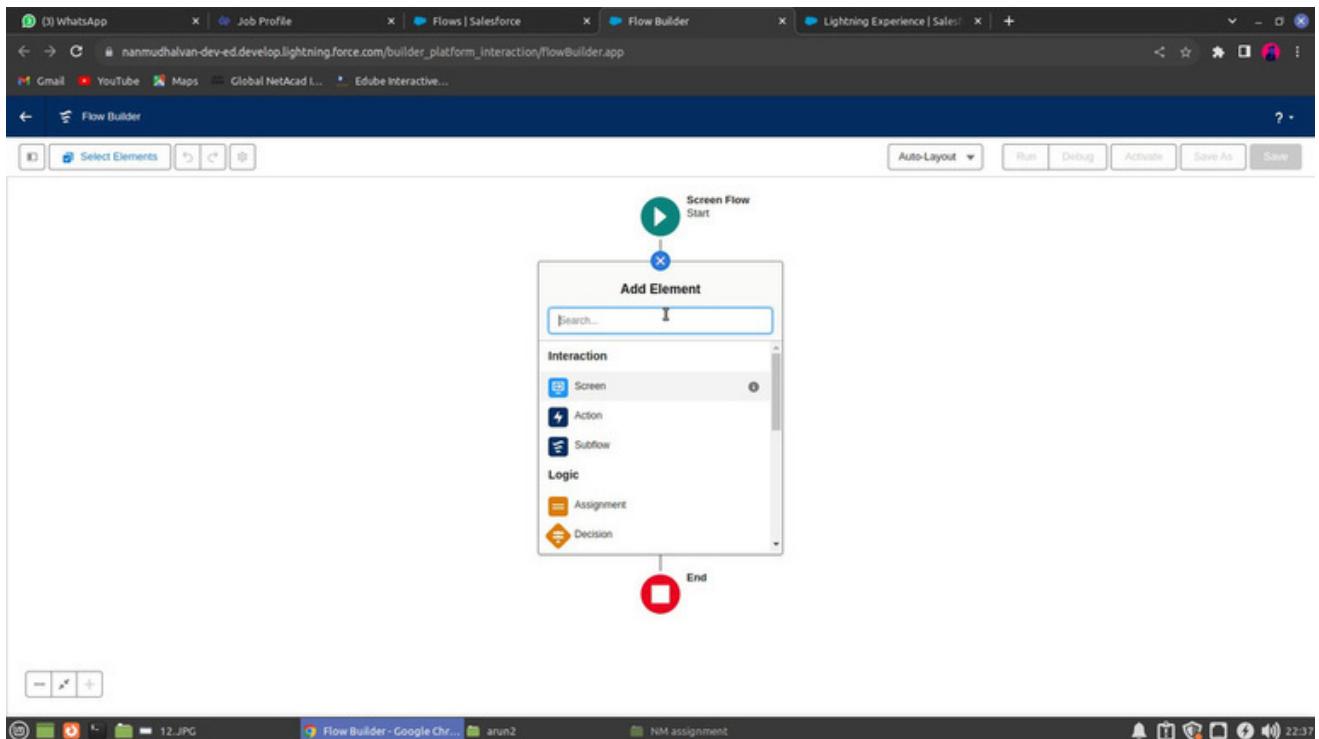
Autolaunched Flow (No Trigger)
Launches when invoked by Apex, processes, REST API, and more. This autolaunched flow runs in the background.

Record-Triggered Orchestration
Launches when a record is created or updated. An orchestration lets you create a multi-step, multi-user process.

Create

Get more on the AppExchange

11.JPG Flow Builder - Google Chrome arun2 NM assignment 22:37



New Screen

Components	Fields
Gen	<p>Name</p> <p>First Name First Name</p> <p>Last Name Last Name</p> <p>Email you@example.com</p> <p>Phone</p> <p>[Date]</p>

Get more on the AppExchange

Date

Label

API Name

Require

Default Value

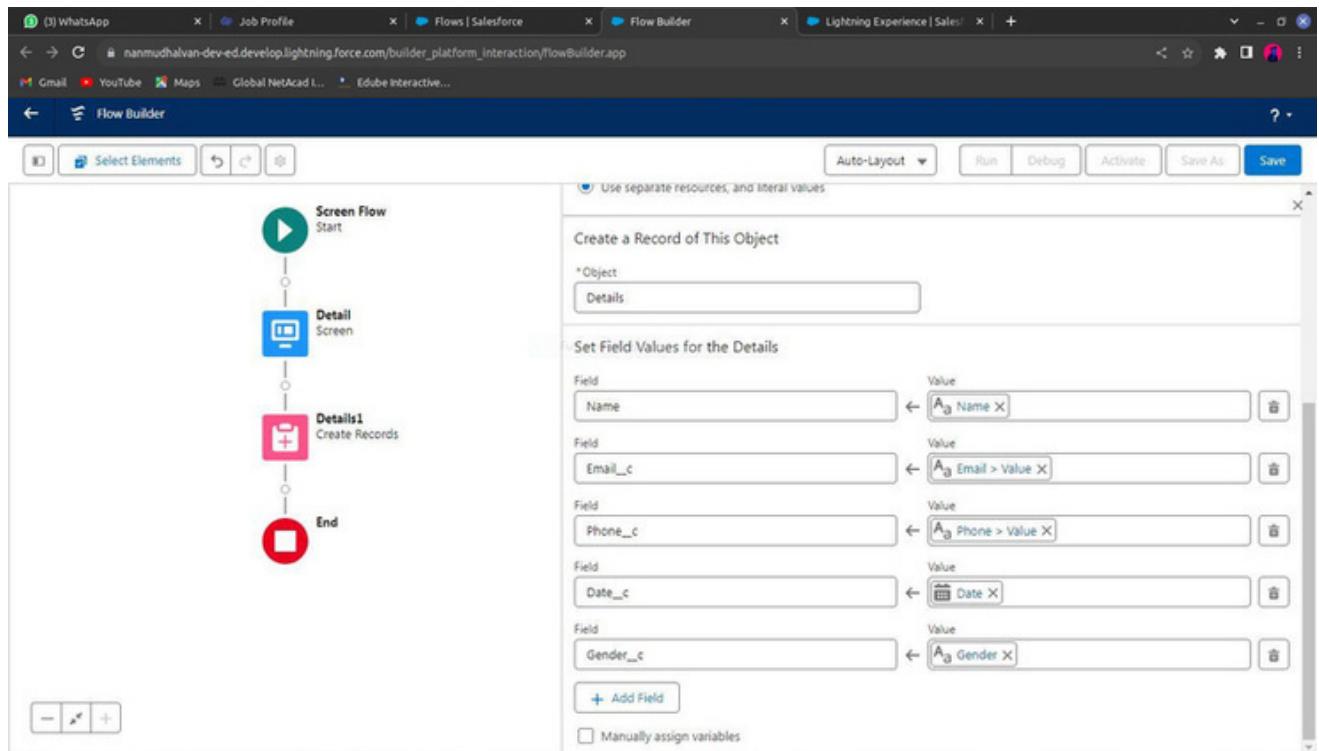
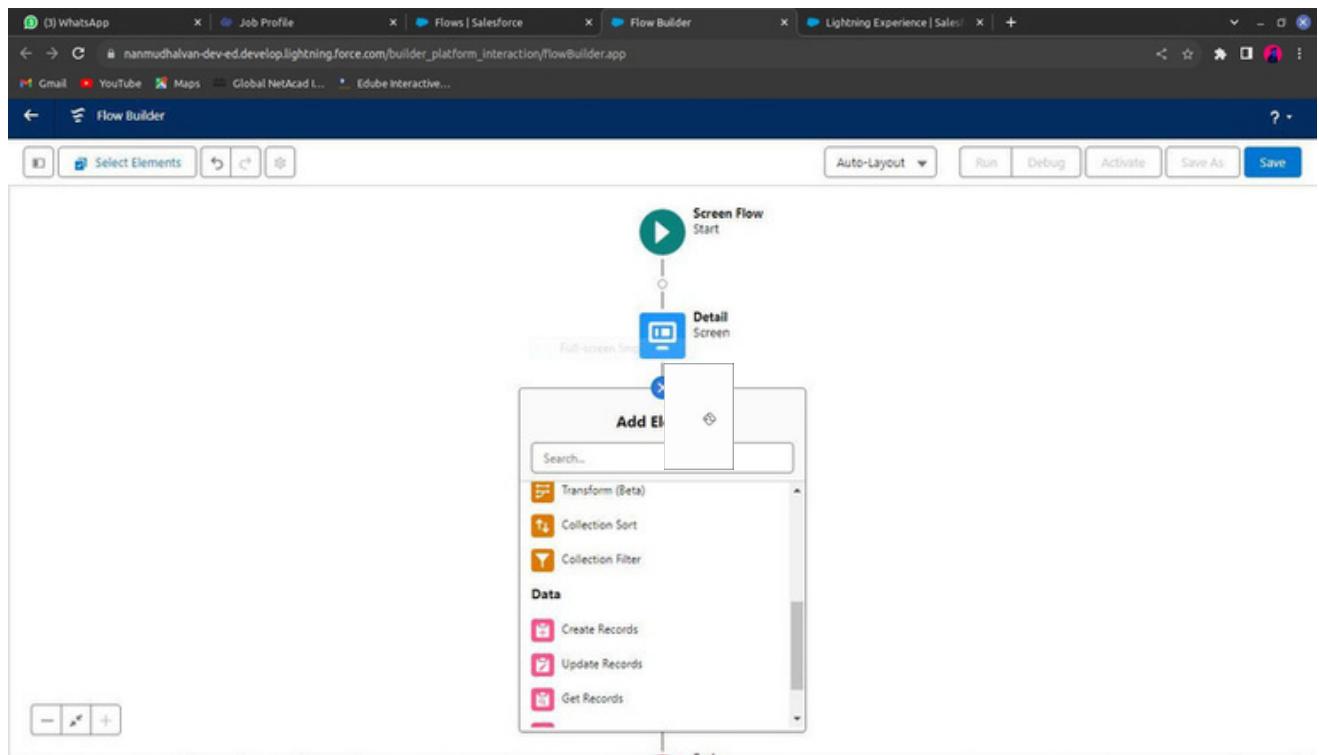
ddMMyyyy

Set Component Visibility

Validate Input

Provide Help

Cancel Done



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

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Details12

Name
priya

Email
Krishna@gmail.com

Phone
1234567890

Date
18-Oct-2023

Gender
Female

Full-screen View

Next

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

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Cloud icon My-app College Department Details

Search...

★ + ? ⚡ 🎁 🌐

Details
priya

New Contact Edit New Opportunity

Related Details

Owner priya

Details Name
priya

Email
Krishna@gmail.com

Phone
1234567890

Date
18/10/2023

Gender
Female

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

Last Modified By
priya 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.

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

The page title is "SETUP New Custom Object".

Custom Object Definition Edit

Custom Object Information

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

Label: Example: Account

Plural Label: Example: Accounts

Starts with vowel sound:

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

Object Name: Example: Account

Description:

Context-Sensitive Help Setting:

Open the standard Salesforce.com Help & Training window

Open a window using a Visualforce page

Content Name: None

Enter Record Name Label and Format

The Record Name appears in name dropdowns, New Sicht, Related Lists, Analytics, 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 also called "Name" when referenced via the API.

Save | Save & New | Cancel

Help for this Page

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

The sidebar shows "tabs" selected under "User Interface".

The main area title is "SETUP Tabs".

New Custom Object Tab

Step 1. Enter the Details

Step 1 of 3

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

Select an existing custom object or create a new custom object now.

Object: Management

Tab Style: Camera

(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:

Next | Cancel

Salesforce Setup interface showing the 'Tabs' configuration page.

The left sidebar shows tabs for 'Setup', 'Home', and 'Object Manager'. A search bar at the top says 'Search Setup'.

The main content area is titled 'Tabs' and displays two sections:

- Custom Object Tabs**: A table listing custom object tabs with their labels and styles.

Action	Label	Tab Style	Description
Edit Del	Colleves	Building Block	
Edit Del	Deasments	Credit card	
Edit Del	Details	Lightning	
Edit Del	Favorites	Diamond	
Edit Del	Erurance_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	
- Web Tabs**: A section stating "No Web Tabs have been defined".

The bottom of the screen shows the system tray with various icons and the time 22:44.

Salesforce Setup interface showing the 'Management' recently viewed items page.

The left sidebar shows tabs for 'Setup', 'Job Profile', 'Flows | Salesforce', 'Flow Builder', and 'Lightning Experience | Sales...'.

The main content area is titled 'Management' and shows a 'Recently Viewed' section with the following details:

- Section title: Management
- Section subtitle: Recently Viewed
- Message: 0 items • Updated a few seconds ago
- Table header: Management Name
- Table body: You haven't viewed any Management recently. Try switching list views.

The bottom of the screen shows the system tray with various icons and the time 22:44.

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

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

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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

Q pro

Hyperforce Assistant

Users Profiles

Data Mass Transfer Approval Requests

Feature Settings

Data.com Prospector Preferences Prospector Users Functions

Marketing Lead Processes

Sales Products Asset Settings

SETUP Profiles

Profiles

All Profiles Edit | Delete | Create New View

New Profile

Action	Profile Name	User License	Custom
<input type="checkbox"/>	Salesforce API Only System Integrations	Salesforce Integration	<input type="checkbox"/>
<input type="checkbox"/>	Silver Panther User	Silver Panther	<input type="checkbox"/>
<input type="checkbox"/>	Solution Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/>	Standard Platform User	Salesforce Platform	<input type="checkbox"/>
<input type="checkbox"/>	Standard User	Salesforce	<input type="checkbox"/>
<input type="checkbox"/>	System Administrator	Salesforce	<input type="checkbox"/>

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

1-6 of 6 0 Selected Previous Next Page 1 of 1

Help for this Page

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

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Search Setup

Setup Home Object Manager

Q pro

Hyperforce Assistant

Users Profiles

Data Mass Transfer Approval Requests

Feature Settings

Data.com Prospector Preferences Prospector Users Functions

Marketing Lead Processes

Sales Products Asset Settings

SETUP Profiles

Profile Edit Manager

Set the permissions and page layouts for this profile.

Profile Edit

Name Manager

User License Salesforce Platform

Description

Custom Profile

Custom App Settings

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

Service Provider Access

* Required Information

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

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Search Setup

Setup Home Object Manager

Profiles

Contact Point Consents Full Read Write Modify Delete View All

Contact Point Emails Full Read Write Modify Delete View All

Streaming Channels Full Read Write Modify Delete View All

User External Credentials Full Read Write Modify Delete View All

Custom Object Permissions

	Basic Access	Create	Edit	Delete	View All	Data Administration
	Read	Read	Read	Read	Read	Read
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

Hyperforce Assistant

Users

Profiles

Data

Mass Transfer Approval Requests

Feature Settings

Data.com

Prospector Preferences

Prospector Users

Functions

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Products

Asset Settings

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Search Setup

Setup Home Object Manager

Profiles

Profile Manager

Full-screen Screenshot 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
User License	Salesforce Platform	<input checked="" type="checkbox"/>
Description		
Created By	Anup J. 16/10/2023, 3:47 pm	Modified By Anup J. 16/10/2023, 3:48 pm

Page Layouts

Standard Object Layouts

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

Hyperforce Assistant

Users

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Asset Settings

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Learn more

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**

v Feature Settings

- v Data.com
- Prospector Users
- v Service

 - v 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

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Q user

v Users

- Permission Set Groups
- Permission Sets
- Profiles
- Public Groups
- Queues
- Roles
- User Management Settings
- Users**

v Feature Settings

- v Data.com
- Prospector Users
- v Service

 - v 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: User1697624453758508665
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

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Search Setup Object Manager

Setup Home

Q 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 Sets Full-screen Setup Help for this Page

All Permission Sets Edit | Delete | Create New View

New

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

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

1-25 of 30 0 Selected Page 1 of 2

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Search Setup Object Manager

Setup Home

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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 Setup Video Tutorial | Help for this Page

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

Aligned Apps Settings that specify which apps are visible in the app menu

Aligned 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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Learn more

Cloud icon

Search Setup

Setup Home Object Manager

Q per

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Users

- Permission Set Groups
- Permission Sets**

Feature Settings

- Digital Experiences
 - Settings
 - Functions
- Sales
 - Accounts
 - Person Accounts
- Salesforce Scheduler
 - Assignment Policies
 - Salesforce Scheduler

manager12

Full-screen Help 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"/>

Q 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

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Learn more

Cloud icon

Search Setup

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Users

- Permission Set Groups
- Permission Sets**

Feature Settings

- Digital Experiences
 - Settings
 - Functions
- Sales
 - Accounts
 - Person Accounts
- Salesforce Scheduler
 - Assignment Policies
 - Salesforce Scheduler

Select Users to Assign

All Users

1 item selected

Full Name ↑ All Username Role Profile

Full Name	All	Username	Role	Profile
priya	AJ	arunj@123gmail.com	<input checked="" type="checkbox"/>	System Administrator
Chatter Expert	Chatter	chatty.00d5j00000dq4hgeat3yy9pn6u4mm@chatter.s...	<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	<input checked="" type="checkbox"/>	Analytics Cloud Integration Us...
manager_1	m1	managerabcabc@gmail.com	<input checked="" type="checkbox"/>	Marketing Team Manager

Cancel Next

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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

Hyperforce Assistant Lightning Experience Transition Assistant Users Permission Set Groups **Permission Sets** Feature Settings Digital Experiences Settings Functions Sales Accounts Person Accounts Salesforce Scheduler Assignment Policies Salesforce Scheduler

Select an Expiration Option For Assigned Users

No expiration date Specify the expiration date Full-screen tips

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

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Cloud Search Setup Home Object Manager

Hyperforce Assistant Lightning Experience Transition Assistant Users Permission Set Groups **Permission Sets** Feature Settings Digital Experiences Settings Functions Sales Accounts Person Accounts Salesforce Scheduler Assignment Policies Salesforce Scheduler

... > SETUP > PERMISSION SET 'MANAGER12'
manager12

Current Assignments Full-screen tips

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

Add Assignment

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

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

The page title is "SETUP New Custom Object".

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: Barik (Example: Account)

Description:

Content Name: (Content-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 lists, 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.

Save Save & New Cancel

Help for this Page

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

The sidebar shows "User Interface" and "Tabs" is selected.

The main area title is "SETUP Tabs".

New Custom Object Tab

Step 1. Enter the Details Step 1 of 3

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

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

Object: Bank (dropdown menu)

Tab Style: Cards (dropdown menu)

(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:

Next Cancel

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**

https://nanmudhalvan-dev-ed.lightning.force.com/lightning/setup/ObjectManager/015h000000jo7D/Details/view

Screenshot of the 'New Custom Object' setup page.

New Custom Object

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more!](#) [Don't show this message again](#)

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 name searches, save lists, related lists, inline edit, 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.

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

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Cloud Search Setup

Setup Home Object Manager

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

Full-screen Snp

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 readonly 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 readonly 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.

Next Cancel

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Cloud Search Setup

Setup Home Object Manager

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

Help for this Page

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

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Prospector Users

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Products

Asset Settings

Standard Platform User

Full-screen Setup Help for this Page

Profile Detail

Name: Standard Platform User

User License: Salesforce Platform

Created By: salesforce.com, Inc., 17/10/2023, 10:41 am

Modified By: Admin, 18/10/2023, 3:34 pm

Custom Profile

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 [View Assignment]
Home Page Layout Home Page Default		Order	Order Layout [View Assignment]

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Clone Profile

Full-screen Setup Help for this Page

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

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Search Setup

Setup Home Object Manager

Hyperforce Assistant

Users Profiles

Data Mass Transfer Approval Requests

Feature Settings Data.com Prospector Preferences Prospector Users Functions

Marketing Lead Processes

Sales Products Asset Settings

Profiles

Management

Set the permissions and page layouts for this profile.

Profile Edit

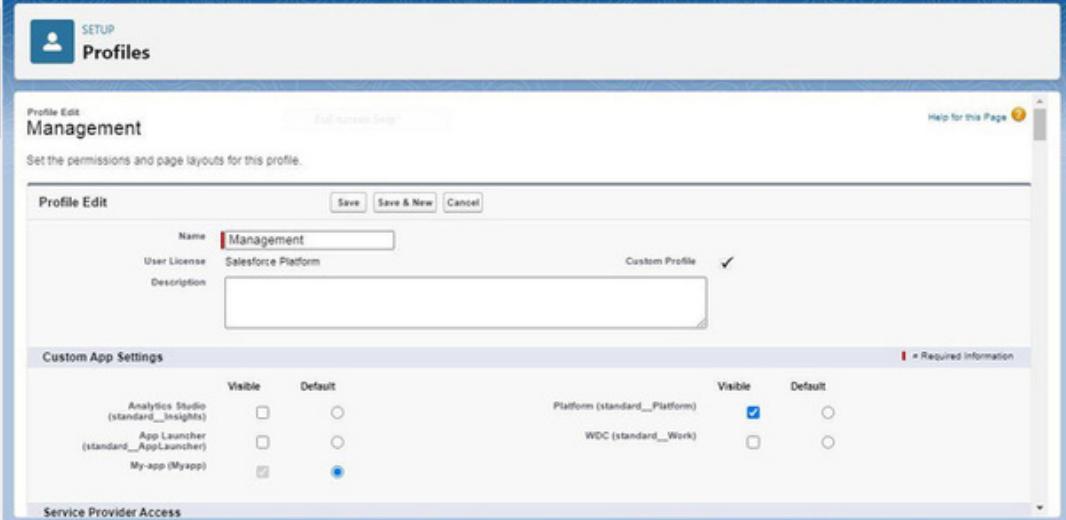
Name: Management
User License: Salesforce Platform
Description:
Custom Profile:

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 type="radio"/>
My-app (Myapp)	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>			

Service Provider Access

Required Information



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Users Profiles

Data Mass Transfer Approval Requests

Feature Settings Data.com Prospector Preferences Prospector Users Functions

Marketing Lead Processes

Sales Products Asset Settings

Profiles

Contact Point Consents

Contact Point Emails	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Emails	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Streaming Channels

User External Credentials	<input type="checkbox"/>					
User External Credentials	<input type="checkbox"/>					

Custom Object Permissions

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

Session Settings

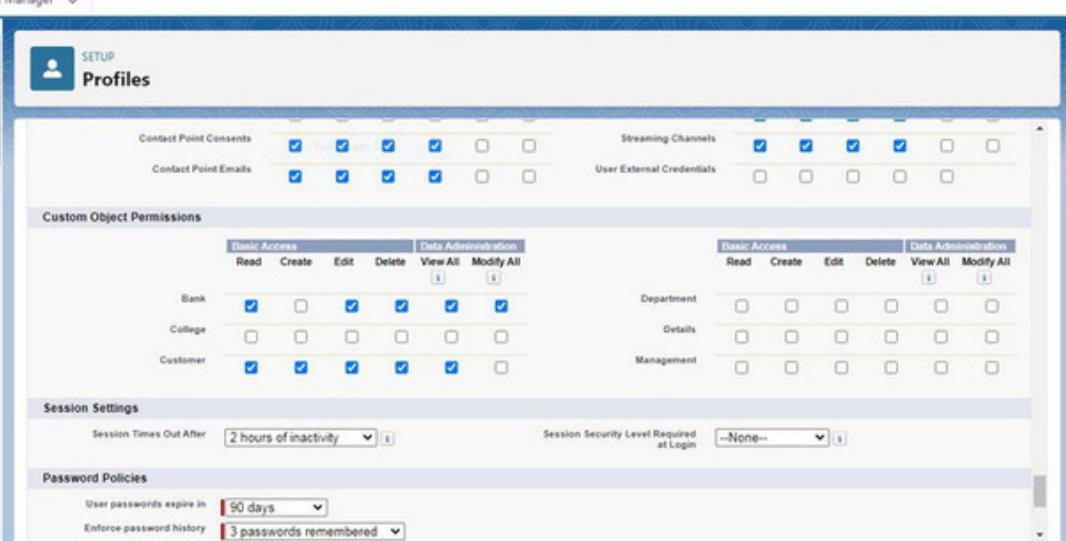
Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

User passwords expire in: 90 days

Enforce password history: 3 passwords remembered



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Cloud Search Setup Object Manager

Q user

SETUP Users

New User Full-screen Help Help for this Page

User Edit Save Save & New Cancel

General Information * Required Information

First Name	manager	Role	<None Specified>
Last Name	bank	User License	Partner App Subscription
Alias	mbank	Profile	Partner App Subscription User
Email	managerbank@gmail.com	Active	<input checked="" type="checkbox"/>
Username	managerbank@gmail.com	Marketing User	<input type="checkbox"/>
Nickname	User1697625040398307733	Offline User	<input type="checkbox"/>
Title		Knowledge User	<input type="checkbox"/>
Company		Flow User	<input type="checkbox"/>
Department		Service Cloud User	<input type="checkbox"/>
Division		Site.com Contributor User	<input type="checkbox"/>
		Site.com Publisher User	<input type="checkbox"/>
		WDC User	<input type="checkbox"/>

Queues Roles User Management Settings Feature Settings Data.com Service Embedded Service Messaging for In-App and Web User

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.

Cloud Search Setup Object Manager

Q prof

SETUP Profiles

Sales Manager Full-screen Help Help for this Page

Profile Edit Save Save & New Cancel

Name Sales Manager User License Salesforce Platform Custom Profile

Description

Custom App Settings * Required Information

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

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

This screenshot shows the Salesforce Setup interface for managing Profiles. It displays a grid of checkboxes for granting various permissions (Basic Access and Data Administration) across different objects like Bank, College, and Customer. The Bank object has Read, Create, Edit, Delete, View All, and Modify All permissions enabled. The College object has Read, Create, Edit, and View All permissions enabled. The Customer object has Read, Create, and View All permissions enabled. Other objects like Department, Details, and Management have no permissions listed.

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Users Profiles

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

New User

User Edit Save Save & New Cancel

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"/>
Department:	Service Cloud User: <input type="checkbox"/>
Division:	Site.com Contributor User: <input type="checkbox"/>
	Site.com Publisher User: <input type="checkbox"/>
	WDC User: <input type="checkbox"/>

This screenshot shows the Salesforce Setup interface for creating a new user. The 'User Edit' screen is displayed with the 'New User' tab selected. The 'General Information' section contains fields for First Name (manager), Last Name (sales), Alias (msale), Email (managersales.123@gmail.com), Username (managersales.123@gmail.com), Nickname (User1697625227851209885), Title, Company, Department, and Division. To the right of these fields are dropdown menus for Role (<None Specified>), User License (Partner App Subscription), Profile (Partner App Subscription User), and checkboxes for Active, Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, and WDC User. The 'Active' checkbox is checked.

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Hyperforce Assistant

Lightning Experience Transition Assistant

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Permission Set Groups

Permission Sets

Feature Settings

Digital Experiences

Settings

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Accounts

Person Accounts

Salesforce Scheduler

Assignment Policies

Salesforce Scheduler

Permission Sets

Permission Sets

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

All Permission Sets Edit | Delete | Create New View

New

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 cent...	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Supervisor	Access supervisor features in Service Cloud Voice contact...	Service Cloud Voice User
<input type="checkbox"/>	Del Clone	Excellence Profile Manager	Salesforce
<input type="checkbox"/>	Facility Manager	Lets users create, read, edit, and delete locations, subloc...	Facility Manager

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other

1-25 of 31 0 Selected

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Permission Sets

Permission Sets

managerbanksales

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

Full-screen Setup Video Tutorial | Help for this Page

Permission Set Overview

Description	API Name	Namespace Prefix
Session Activation Required	Created By	Last Modified By
Permission Set Groups Added To	18/10/2023, 4:06 pm	18/10/2023, 4:06 pm

Apps

Assigned Apps
Assigned Connected Apps
Object Settings
App Permissions
Apex Class Access

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Salesforce Scheduler

SETUP Permission Sets

managerbanksales

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

Permission Set Overview Object Settings Accounts

Accounts Save Cancel

Object Permissions

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

Field Permissions

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

Video Tutorial | Help for this Page

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All Users

1 item selected

Full Name ↑ All... Username Role Profile

Full Name	All...	Username	Role	Profile
priya		arunj@123gmail.com	<input checked="" type="checkbox"/>	System Administrator
Chatter Expert	Chatter	chatty:00d5j00000dq4hgeat.t3yyipn6v4mm@c...	<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 User
manager 1	m1	managerabcabc@gmail.com	<input checked="" type="checkbox"/>	Marketing Team Manager
manager 2	m2	managerxyzxyz@gmail.com	<input checked="" type="checkbox"/>	Marketing Team Solution Manager
manager bank	mbank	managerbank123@gmail.com	<input checked="" type="checkbox"/>	Salesforce API Only System Integrator

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

Full-screen Sip

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

The screenshot shows the Salesforce Lightning Experience interface. At the top, there's a navigation bar with tabs like WhatsApp, Job Profile, Flows, Flow Builder, and Lightning Experience. Below that is a secondary navigation bar with categories like My-app, Recently Viewed, College, Department, Details, Management, Customers, and Bank. Under the Customers category, there's a sub-section titled 'Recently Viewed' with a dropdown arrow. It displays a message: '0 items • Updated a few seconds ago'. Below this, there's a table header with columns for 'Total Life Time Value' and 'Name', and a 'Full-screen Sip' button. At the bottom of the list area, there's a message: 'You haven't viewed any Customers recently. Try switching list views.'.