

Naan Mudhalvan
Salesforce Developer(Course)
Assignment

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Year & Dep : 4th year & IT
Batch : 2024
Zone no : Zone 8

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

WhatsApp New Custom Object | Salesfo + nanmudhalvan-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new

Gmail YouTube Maps Global NetAcad Edube Interactive...

Setup Home Object Manager Search Setup

SETUP New Custom Object Help for this Page

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

Custom Object Definition Edit Save Save & New Cancel

Custom Object Information ! = Required Information

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

Label Example: Account

Plural Label Example: Accounts

Starts with vowel sound

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

Object Name Example: Account

Description

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

Content Name

Enter Record Name Label and Format

The Record Name appears in 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 Example: Account Name

Help for this Page

New Custom Object | Sales... Sales Force Developer assi... Salesforce 20:56

WhatsApp New Custom Object | Salesfo + nanmudhalvan-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new

Gmail YouTube Maps Global NetAcad Edube Interactive...

Setup Home Object Manager Search Setup

SETUP New Custom Object Help for this Page

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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 Example: Account Name

Help for this Page

New Custom Object | Sales... Sales Force Developer assi... Salesforce 20:57

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

Object Manager SETUP

Step 4. Add custom related lists Step 4 of 4

Field Label: Department
Data Type: Master-Detail
Field Name: Department
Description:

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

Buttons: Previous, Save & New, Save, Cancel

Help for this Page ?

Setup Home Object Manager

Search Setup

WhatsApp Object Manager | Salesforce Sales Force Developer assi... Salesforce

Screenshot of the Salesforce Tabs setup page.

Setup 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	Colleges	Building Block	
Edit Del	Departments	Credit card	
Edit Del	Favourites	Diamond	
Edit Del	Fragrance_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	

Web Tabs

Action	Label	Tab Style	Description
New	What Is This?		

Help for this Page ?

Setup Home Object Manager

Search Setup

WhatsApp Tabs | Salesforce - Google... 11.JPG linux arun1

WhatsApp | Job Profile | Recently Viewed | our_customers | Department | Salesforce

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Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER Department

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

○ Currency

○ Date

○ Date/Time

○ Email

○ Geolocation

○ Number

○ Percent

○ Phone

○ Picklist

○ Picklist (Multi-Select)

○ Text

○ Text Area

○ Text Area (Long)

○ Text Area (Rich)

○ Text (Encrypted) ?

○ Time

○ URL

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

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

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

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

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

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

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

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

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

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

Allows users to enter any combination of letters and numbers.

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

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

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

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

Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:50.600" are all valid times for this field.

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

Next Cancel

17.JPG Department | Salesforce - arun1 22:22

WhatsApp | Job Profile | Recently Viewed | our_customers | Department | Salesforce

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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

Department New Custom Field

Step 2. Enter the details Step 2 of 4

Field Label ?

Field Name ?

Description

Help Text

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

Unique Do not allow duplicate values

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

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

Default Value Show Formula Editor

Use formula syntax: Enclose text and picklist value API names in double quotes: ("The_Text"), include numbers without quotes: (25), show percentages as decimal: (0.10), and express date calculations in the standard format: (Today() + 7). To reference a field from a Custom Metadata type record use: \${CustomMetadata.Type__mdt.RecordAPIName.FieldName}

Previous Next Cancel

17.JPG Department | Salesforce - arun1 22:22

Screenshot of the Salesforce Object Manager for the 'Department' object. The 'Fields & Relationships' tab is selected. A list of field types is shown on the left, with their descriptions on the right. The 'Phone' field type is selected.

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 popup calendar.
Date/Time	Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
Email	Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
Geolocation	Allows users to define location. Includes latitude and longitude components, and can be used to calculate distance.
Number	Allows users to enter any number. Leading zeros are removed.
Percent	Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.
Phone	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.
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.

Screenshot of the 'New Custom Field' setup page for the 'Department' object. The 'Step 2. Enter the details' section is active. A 'Field Label' of 'Dept_No.' and a 'Field Name' of 'Dept_No.' are entered. The 'Required' checkbox is unchecked. The 'Auto add to custom report type' checkbox is checked. The 'Default Value' is set to 'Show Formula Editor'.

Help for this Page 

Step 2 of 4   

Field Label

Field Name

Description

Help Text

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

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

Default Value

Use formula syntax: Enclose text and picklist value API tokens in double quotes ('The_XYZ'). Include numbers without quotes ('100'), show percentages as decimals ('0.10'), and express date calculations in the standard format ('Today() - 7'). To reference a field from a Custom Metadata type record use: \${CustomMetadataType__Name__r.Fields.FieldName__c}.

Previous   

WhatsApp | Job Profile | Recently Viewed | our_custom | Department | Salesforce

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Department

SETUP > OBJECT MANAGER

Fields & Relationships

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Department Name	Name	Text(80)		✓
Dept_mail	Dept_mail__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)		▼

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

17.JPG Department | Salesforce ... linux arun1

Setup | Home | Object Manager

Department

SETUP > OBJECT MANAGER

Fields & Relationships

Specify the type of information that the custom field will contain.

Data Type

None Selected Select one of the data types below.

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

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

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

Lookup Relationship Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a 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 | Home | Object Manager

SETUP > OBJECT MANAGER

Department

Details

Fields & Relationships

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

Department New Relationship

Step 6. Add custom related lists

Field Label: College
 Data Type: Master-Detail
 Field Name: College
 Description:

Specify the title that the related list will have in all of the layouts associated with the parent.
 Related List Label: Department

These are the page layouts that will include this field. Because this is a Master-Detail relationship, the field is required.

Add Related List: Page Layout Name
 College Layout

Append related list to users' existing personal customizations

Step 6 of 6

Previous | Save & New | Save | Cancel

Setup | Home | Object Manager

SETUP > OBJECT MANAGER

College

Details

Fields & Relationships

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts

Data Type

None Selected
 Select one of the data types below.

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

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

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

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 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.

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- You can create rollup summary fields on the master record to summarize the detail records.

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

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

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

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

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

Cloud icon

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

College

Details

Fields & Relationships

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts

College New Custom Field

Step 2. Enter the details Step 2 of 5

Field Label: i

Field Name: i

Description:

Help Text:

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

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: i

Required Information: i

Select Roll-Up Type

COUNT
 SUM
 MIN
 MAX

Field to Aggregate:

Filter Criteria

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

Previous Next Cancel

Setup | Home | Object Manager

SETUP > OBJECT MANAGER

College

Details

Fields & Relationships
5 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
College Name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Total Count	Total_Count__c	Roll-Up Summary (COUNT Department)		

Setup | Home | Object Manager

Search Setup

SETUP

Lightning Experience App Manager

New Lightning App | New Connected App

app m

Apps

App Manager

User Interface

App Menu

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

22 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type

App Name ↑	Developer Name	Description	Last Modified Date	App T...	Visib...
1 All Tabs	AllTabSet		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://namudhalvan-dev.develop.lightning.force.com/one/one.app#/setup/navigationMenus/home>

Search Setup

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"/>

Search Setup

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.

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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

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

New Lightning App

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

Navigation and Form Factor

* Navigation Style
 Standard navigation
 Console navigation

* Supported Form Factors
 Desktop and phone
 Desktop
 Phone

Setup and Personalization

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

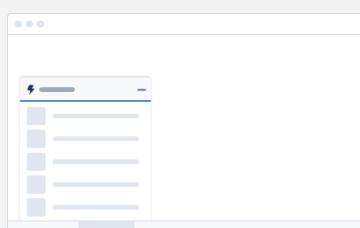
App Personalization Settings
 Disable end user personalization of nav items in this app
 Disable temporary tabs for items outside of this app

Back **Next**

13	Queue Management	QueueManagement	Create and manage queues for your business.	01/10/2023, 6:39 am	Lightning	<input 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 type="checkbox"/>

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**

13	Queue Management	QueueManagement	Create and manage queues for your business.	01/10/2023, 6:39 am	Lightning	<input 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 type="checkbox"/>

New Lightning App

App Details

App Name: My_App

Developer Name: My_App

Description: Enter a description...

App Branding

Image: Primary Color Hex Value: #0070D2

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

App Launcher Preview

My 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

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 ✓

My-app College Department

College Recently Viewed ▾

0 items • Updated a few seconds ago

College Name

New College

Full-screen Snip * = Required Information

Information

*College Name: AVS

Owner: Ajmal

Cancel Save & New Save

This screenshot shows a CRM application interface. At the top, there is 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. The main content area displays a 'College AVS' record. The 'Details' tab is selected, showing the following fields:

- College Name: AVS
- Owner: Ajmal
- Total Count: 0
- Created By: Ajmal on 18/10/2023, 3:28 pm
- Last Modified By: Ajmal on 18/10/2023, 3:28 pm

At the top right of the content area, there are buttons for 'New Contact', 'Edit', and 'New Opportunity'.

This screenshot shows a 'New Department' form in a CRM application. The top navigation bar is identical to the previous screenshot, showing 'My-app', 'College', and 'Department'. The main content area is titled 'New Department' and contains an 'Information' section with the following fields:

- *Department Name: CSE
- Email: cse@gmail.com
- Phone: 1234567899
- *College: AVS

At the bottom of the form, there are buttons for 'Cancel', 'Save & New', and 'Save'. A note in the top right corner indicates that an asterisk (*) denotes required information. The right side of the screen shows a toolbar with various icons for actions like New, Import, and Change Owner.

My-app College Department

Department CSE

Department "CSE" was created.

Related Details

Department Name: CSE

Email: cse@gmail.com

Phone: 1234567899

College: AVS

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

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

Full-screen Snip

New Contact Edit New Opportunity

My-app College Department

College AVS

Owner: Ajmal

Related Details

College Name: AVS

Total Count: 1

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

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

New Contact Edit New Opportunity

2. If there is 2 user, User A and User B in the organisation and we want in Account object that User A should not see the User B Record and user B should not see User A record then apply the Security for the users.

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

Page Title: New Custom Object | Salesfo

Page Content:

Custom Object Definition Edit

Custom Object Information

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

Label	Details	Example: Account
Plural Label	Details	Example: Accounts
Starts with vowel sound	<input type="checkbox"/>	

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

Object Name	Details	Example: Account
-------------	---------	------------------

Description

Context-Sensitive Help Setting

Open the standard Salesforce.com Help & Training window

Open a window using a Visualforce page

Content Name

Enter Record Name Label and Format

The Record Name appears in new layouts, new 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

Setup **Home** **Object Manager**

Search Setup

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

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

2.JPG

Google Chrome 2.JPG arun2 NM assignment 22:29

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

Page Title: Details | Salesfo

Page Content:

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Details

Description

API Name

Details_c

Custom

Singular Label

Details

Plural Label

Details

Edit **Delete**

Enable Reports

Track Activities

Track Field History

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

Setup > OBJECT MANAGER

Search Setup

nanmudhalvan-dev-ed.lightning.force.com/lightning/setup/ObjectManager/015h00000jo5l/Details/view

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

2.JPG

Google Chrome 2.JPG arun2 NM assignment 22:29

Setup | Home | Object Manager | Search Setup

SETUP > OBJECT MANAGER | Details

Fields & Relationships (4 Items, Sorted by Field Label)

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

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

22:30

Setup | Home | Object Manager | Search Setup

SETUP > OBJECT MANAGER | Details

Fields & Relationships

Rollup Summary

- Lookup Relationship
- Master-Detail Relationship
- External Lookup Relationship

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

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

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

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

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

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

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 DateTime field.

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

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

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

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

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

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

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

Allows users to enter any combination of letters and numbers.

22:30

Setup | Home | Object Manager | Details

SETUP > OBJECT MANAGER | Details

New Custom Field

Step 2. Enter the details | 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

Use formula editor. Enclose text and picklist value API names in double quotes. ('the_text'), include numbers without quotes: (25), show percentages as decimals: (0.10), and express date calculations in the standard format: (Today() + 7). To reference a field from a Custom Metadata type record use: \${CustomMetadata.Type__mdt.RecordAPIName.FieldName__c}

Previous | Next | Cancel

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

Setup | Home | Object Manager | Details

SETUP > OBJECT MANAGER | Details

New Custom Field

Step 4. Add to page layouts | 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 Chrome | arun2 | NM assignment | 22:31

(2) WhatsApp Job Profile Details | Salesforce Lightning Experience | Sales...

nanmudhalvan-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/015h000000j05/FieldsAndRelationships/new

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

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER Details

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Phone

Currency

Date

DateTime

Email

Geolocation

Number

Percent

Picklist

Picklist (Multi-Select)

Text

Text Area

Text Area (Long)

Text Area (Rich)

Text (Encrypted)

Time

URL

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

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

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

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

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

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

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

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

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

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

Allows users to enter any combination of letters and numbers.

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

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

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

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

Allows users to enter a local time. For example, '2:40 PM', '14:40', '14:40:00', and '14:40:50.600' are all valid times for this field.

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

Next Cancel

7.JPG Details | Salesforce - Google arun2 NM assignment

(2) WhatsApp Job Profile Details | Salesforce Lightning Experience | Sales...

nanmudhalvan-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/015h000000j05/FieldsAndRelationships/new

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

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER Details

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Buttons, Links, and Actions

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Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Step 2. Enter the details

Field Label: Phone

Field Name: Phone

Description:

Help Text:

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

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

Default Value: Show Formula Editor

Use formula syntax. Enclose text and picklist value API names in double quotes: '{The_Text}', include numbers without quotes: {25}, show percentages as decimals: {0.10}, and express date calculations in the standard format: {Today} + 7, To reference a field from a Custom Metadata type record use: \${CustomMetadata.Type__not.RecordId}!{FieldName__c}

Help for this Page

Step 2 of 4

Previous Next Cancel

7.JPG Details | Salesforce - Google arun2 NM assignment

2 (2) WhatsApp Job Profile Details | Salesforce Lightning Experience | Salesf...

nanmudhalvan-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01i5h000000jo51/FieldsAndRelationships/new

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

Cloud Setup Home Object Manager

Search Setup

SETUP > OBJECT MANAGER Details

Details New Custom Field

Step 4. Add to page layouts Step 4 of 4

Field Label: Phone
Date 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.

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

2 (2) WhatsApp Job Profile Details | Salesforce Lightning Experience | Salesf...

nanmudhalvan-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01i5h000000jo51/FieldsAndRelationships/new

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Cloud Setup Home Object Manager

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Details Fields & Relationships

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Triggers

Flow Triggers

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

Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
Allows users to enter a date or pick a date from a popup calendar.
Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
Allows users to enter any number. Leading zeros are removed.
Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.
Allows users to enter any phone number. Automatically formats it as a phone number.
Allows users to select a value from a list you define.
Allows users to select multiple values from a list you define.
Allows users to enter any combination of letters and numbers.
Allows users to enter up to 255 characters on separate lines.
Allows users to enter up to 131,072 characters on separate lines.
Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.
Allows users to enter any combination of letters and numbers and store them in encrypted form.
Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:50.600" are all valid times for this field.
Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

Next Cancel

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

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER Details

Help for this Page

Details New Custom Field Step 2 of 4

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 syntax: Enclose text and picklist value API names in double quotes: ("the_text"), include numbers without quotes: (25), show percentages as decimals: (0.10), and express date calculations in the standard format: (Today) + 7. To reference a field from a Custom Metadata type record use: \${CustomMetadataTypeRecordName.FieldName__c}

Previous Next Cancel

6.JPG Details | Salesforce - Google arun2 NM assignment

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

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER Details

Help for this Page

Details New Custom Field Step 4 of 4

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

6.JPG Details | Salesforce - Google arun2 NM assignment

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

nanmudhalvan-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/015h000000j051/FieldsAndRelationships/new

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Cloud Search Setup

Setup Home Object Manager

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Flow Triggers

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 location. Includes latitude and longitude components, and can be used to calculate distance.

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

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

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

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

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

Allows users to enter any combination of letters and numbers.

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

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

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

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

Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:50.600" are all valid times for this field.

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

Next Cancel

7.JPG Details | Salesforce - Google Chrome arun2 NM assignment 22:33

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

nanmudhalvan-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/015h000000j051/FieldsAndRelationships/new

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

Cloud Search Setup

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Flow Triggers

Help for this Page

Step 2 of 4

Step 2. Enter the details

Field Label: Gender

Values:

Use global picklist value set

Enter values, with each value separated by a new line

Male
Female

Display values alphabetically, not in the order entered

Use first value as default value

Restrict picklist to the values defined in the value set

Field Name: Gender

Description:

Help Text:

Previous Next Cancel

7.JPG Details | Salesforce - Google Chrome arun2 NM assignment 22:33

Details

SETUP > OBJECT MANAGER

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.

Help for this Page

Previous Save & New Save Cancel

7.JPG Details | Salesforce - Google Chrome arun2 NM assignment 22:34

Details

SETUP > OBJECT MANAGER

Details

Fields & Relationships

8 Items. Sorted by Field Label

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

Quick Find New Deleted Fields Field Dependencies Set History Tracking

8.JPG

8.JPG Details | Salesforce - Google Chrome arun2 NM assignment 22:35

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

Page Title: Tabs | Salesforce

Section: Tabs

Sub-Section: New Custom Object Tab

Step: Step 1 of 3

Form Fields:

- Select an existing custom object or [create a new custom object now](#).
- Object: **Details** (selected)
- Tab Style: **Lightning**
- (Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab. **Splash Page Custom Link**: **--None--**
- Enter a short description.
- Description: (empty text area)

Buttons:

- [Next](#)
- [Cancel](#)

Page Bottom:

- Recent tabs: WhatsApp, Job Profile, Tabs | Salesforce, Lightning Experience | Sales...
- Global navigation: Home, Object Manager, Search Setup, Help, Notifications, User Profile.

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

Page Title: Tabs | Salesforce

Section: Tabs

Sub-Section: Custom Tabs

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

Text: 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.

Table: Custom Object Tabs

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

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			

Time Based Workflow

Flows Migrate to Flow Paused And Failed Flow Interviews Process Builder Workflow Actions Email Alerts Field Updates Outbound Messages Send Actions Tasks Workflow Rules Environments Monitoring

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

Flow Builder

Lightning Experience | Sales

Free-Form Run Debug Activate Save As Save

Toolbox

Elements Manager

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.

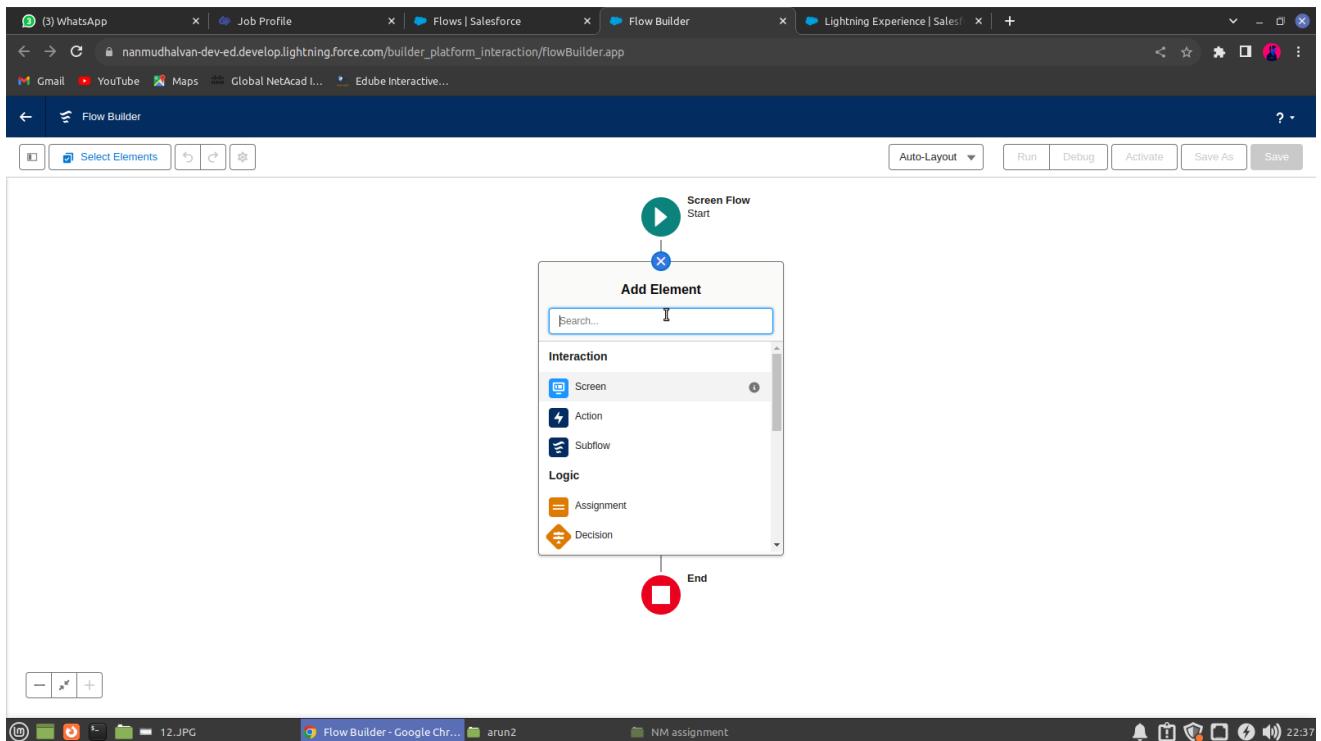
Record-Triggered Orchestration

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

Name

First Name

Last Name

Email

you@example.com

Phone

Date

[Date]

Get more on the AppExchange

Pause

Previous

Finish

Date

Label

* API Name

Require

Default Value

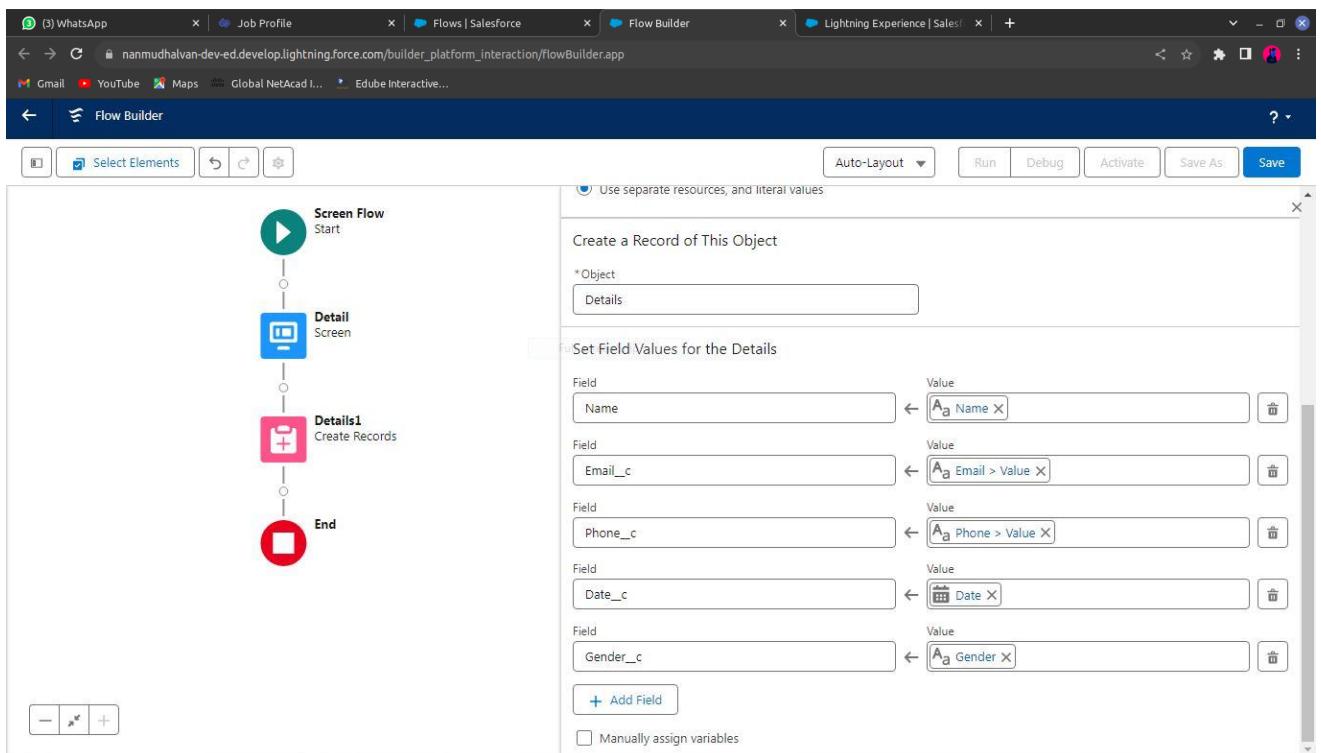
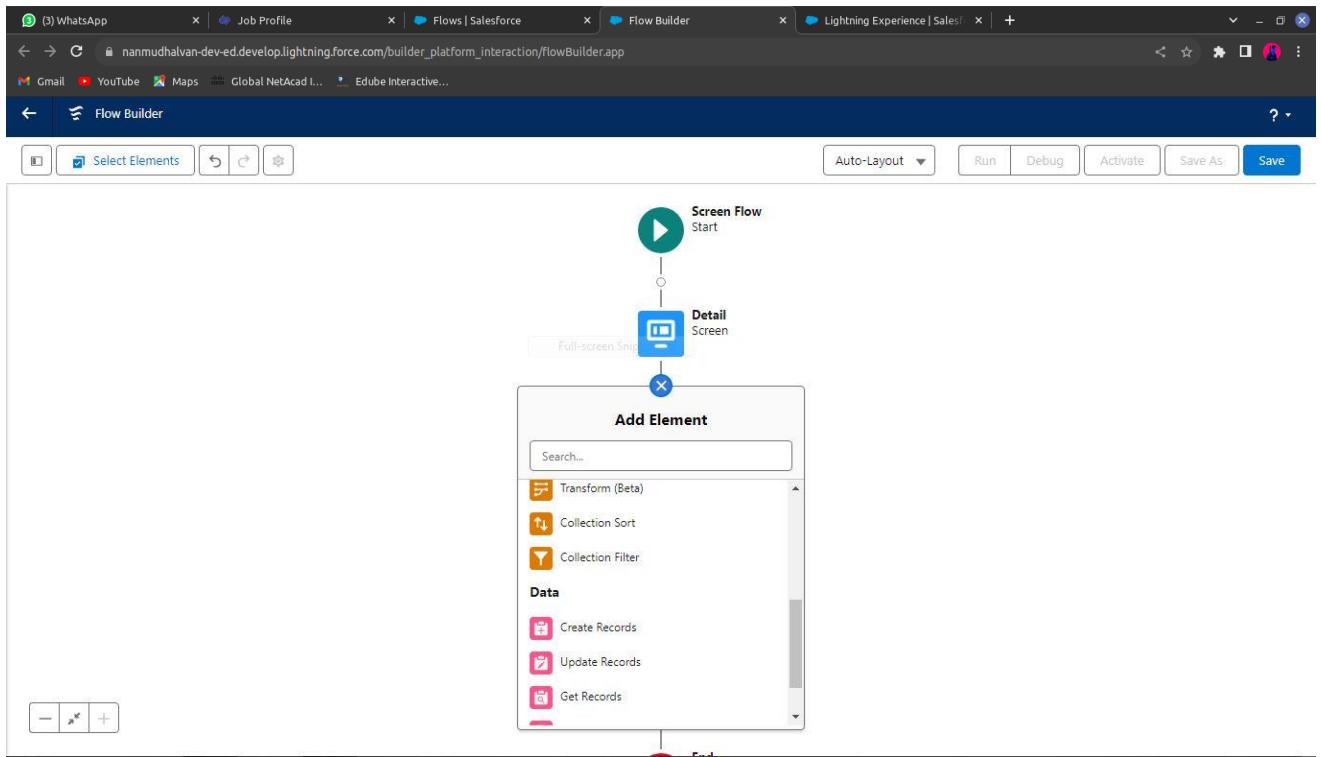
dd/MM/yyyy

Set Component Visibility

Validate Input

Provide Help

Cancel Done



Details12

Name
Ajmal

Email
ajmali@mail.com

Phone
1234567890

Date
18-Oct-2023

Gender
Male

[Next](#)

My-app

College Department Details

Search...

Details Ajmal

New Contact Edit New Opportunity

Related Details

Details Name	Arun	Owner	Ajmal
Email	arun@gmail.com	Last Modified By	Ajmal
Phone	1234567890	Created By	Ajmal
Date	18/10/2023	Created On	18/10/2023, 3:42 pm
Gender	Male	Modified On	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.

S (5) WhatsApp Job Profile New Custom Object | Salesfo Lightning Experience | Salesfo + nanmudhalvan-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new Gmail YouTube Maps Global NetAcad I... Edube Interactive... Search Setup Setup Home Object Manager

SETUP New Custom Object

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 Save Save & New Cancel

Custom Object Information | = Required 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 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.

Setup Home Object Manager

Help for this Page

1.JPG New Custom Object | Salesfo arun3 NM assignment

S (5) WhatsApp Job Profile Tabs | Salesforce Lightning Experience | Salesfo + nanmudhalvan-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2FobjectCustomTabWizard.jsp%3FretURL%3D%252Fsetup%252Fui%252Fcustom... Gmail YouTube Maps Global NetAcad I... Edube Interactive... Search Setup Setup Home Object Manager

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

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

3.JPG arun3 NM assignment

S (5) WhatsApp | Job Profile | Tabs | Salesforce | Lightning Experience | Sales | +

nanmudhalvan-dev-ed.lightning.force.com/lightning/setup/customTabs/page?address=%2Fsetup%2Fui%2Fcustomtabs.jsp%3FsetupId%3DCustomTabs%26retURL%3D%252Fsetup%252F...

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

Cloud Search Setup Home Object Manager

tabs

User Interface

Rename Tabs and Labels

Tabs

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

Custom Object Tabs

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

Web Tabs

Action	Label	Tab Style	Description
New	What Is This?		
No Web Tabs have been defined			

_tabs | Salesforce - Google... 3.JPG arun3 NM assignment

22:44

S (3) WhatsApp | Job Profile | Flows | Salesforce | Flow Builder | Lightning Experience | Sales | +

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

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

Cloud Search Management

My-app Recently Viewed College Department Details Management

Management Recently Viewed

0 items • Updated a few seconds ago

Management Name

Full-screen Snip

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

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

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

Search Setup

Setup Home Object Manager

Profiles

Profiles

All Profiles | Edit | Delete | Create New View

New Profile

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

1-6 of 6 | 0 Selected | Page 1 of 1

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

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

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

Search Setup

Setup Home Object Manager

Profiles

Profile Edit Manager

Set the permissions and page layouts for this profile.

Profile Edit

Name: Manager

User License: Salesforce Platform

Custom Profile:

Description:

Custom App Settings

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

Service Provider Access

Hyperforce Assistant

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Search Setup

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Hyperforce Assistant

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Products

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SETUP Profiles

Contact Point Consents

Full	Green	Yellow	Green	Yellow	Green	Yellow
------	-------	--------	-------	--------	-------	--------

Contact Point Emails

Green	Yellow	Green	Yellow	Green	Yellow	Green	Yellow
-------	--------	-------	--------	-------	--------	-------	--------

Streaming Channels

Green	Yellow	Green	Yellow	Green	Yellow	Green	Yellow
-------	--------	-------	--------	-------	--------	-------	--------

User External Credentials

Green	Yellow	Green	Yellow	Green	Yellow	Green	Yellow
-------	--------	-------	--------	-------	--------	-------	--------

Custom Object Permissions

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

Minimum password length: 8

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

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

Search Setup

Setup Home Object Manager

pro

Hyperforce Assistant

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SETUP Profiles

Profile Manager

Full-screen Snip

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.

Enabled Record Types: 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	Arun_J, 18/10/2023, 3:47 pm	Modified By	Arun_J, 18/10/2023, 3:48 pm

Page Layouts

Standard Object Layouts

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

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

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Learn more

Cloud Search Setup Object Manager

Setup Home Object Manager

user

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Service

Embedded Service

Messaging for In-App and Web User

SETUP Users

New User

User Edit

Save Save & New Cancel

General Information

First Name: manager

Last Name: 1

Alias: m1

Email: manager aaa@gmail.com

Username: manager.aaa@gmail.com

Nickname: User1697624338709764377

Title:

Company:

Department:

Division:

Role: Marketing Team

User License: Salesforce Platform

Profile: Manager

Active:

Marketing User:

Offline User:

Knowledge User:

Flow User:

Service Cloud User:

Site.com Contributor User:

Site.com Publisher User:

WDC User:

Help for this Page

Full-screen Snip

Cloud Search Setup Object Manager

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User Management Settings

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Data.com

Prospector Users

Service

Embedded Service

Messaging for In-App and Web User

SETUP Users

New User

User Edit

Save Save & New Cancel

General Information

First Name: manager

Last Name: 2

Alias: m2

Email: managerxyz.xyz@gmail.com

Username: managerxyz.xyz@gmail.com

Nickname: User1697624453758508865

Title:

Company:

Department:

Division:

Role: Marketing Team

User License: Salesforce

Profile: Solution Manager

Active:

Marketing User:

Offline User:

Knowledge User:

Flow User:

Service Cloud User:

Site.com Contributor User:

Site.com Publisher User:

WDC User:

Help for this Page

Full-screen Snip

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

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Cloud Search Setup Object Manager

Setup Home

per

Hyperforce Assistant

Lightning Experience Transition Assistant

Users

Permission Set Groups

Permission Sets

Feature Settings

Digital Experiences

Settings

Functions

Sales

Accounts

Person Accounts

Salesforce Scheduler

Assignment Policies

Salesforce Scheduler

SETUP

Permission Sets

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

All Permission Sets | Edit | Delete | Create New View

New

Action	Permission Set Label	Description	License
<input type="checkbox"/>	Clone	Buyer	B2B Buyer Permission Set One Seat
<input type="checkbox"/>	Clone	Buyer Manager	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/>	Clone	C360 High Scale Flow Integration User	Cloud Integration User
<input type="checkbox"/>	Clone	CRM User	CRM User
<input type="checkbox"/>	Clone	Commerce Admin	Commerce Admin Permission Set License Seats
<input type="checkbox"/>	Clone	Contact Center Admin	Manage Service Cloud Voice contact centers that use Am...
<input type="checkbox"/>	Clone	Contact Center Agent	Access agent features in Service Cloud Voice contact...
<input type="checkbox"/>	Clone	Contact Center Supervisor	Access supervisor features in Service Cloud Voice contact...
<input type="checkbox"/>	Del Clone	Experience Profile Manager	Salesforce
<input type="checkbox"/>	Clone	Facility Manager	Facility Manager

1-25 of 30 | 0 Selected | Page 1 of 2

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

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Cloud Search Setup Object Manager

Setup Home

per

Hyperforce Assistant

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Settings

Functions

Sales

Accounts

Person Accounts

Salesforce Scheduler

Assignment Policies

Salesforce Scheduler

SETUP

Permission Sets

manager12

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

Video Tutorial | Help for this Page

Permission Set Overview

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

Apps

Assigned Apps

Assigned Connected Apps

Object Settings

App Permissions

Apex Class Access

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

To get future Google Chrome updates, you'll need Windows 10 or later. This computer is using Windows 7. [Learn more](#)

Setup | Home | Object Manager | Search Setup | [Full-screen Snip](#) | [Video Tutorial](#) | [Help for this Page](#)

Hyperforce Assistant

Lightning Experience Transition Assistant

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Permission Set Groups

Permission Sets

Feature Settings

Digital Experiences

Settings

Functions

Sales

Accounts

Person Accounts

Salesforce Scheduler

Assignment Policies

Salesforce Scheduler

Permission Set **manager12**

Find Settings... | [Clone](#) | [Delete](#) | [Edit Properties](#) | [Manage Assignments](#) | [View Summary \(Beta\)](#)

Permission Set Overview > Object Settings > Accounts

Accounts | [Save](#) | [Cancel](#)

Object Permissions

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

Field Permissions

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

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

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Setup | Home | Object Manager | Search Setup | [Full-screen Snip](#) | [Search this list...](#) | [Cancel](#) | [Next](#)

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 Users to Assign

All Users ▾

1 item selected

Full Name	AI...	Username	Role	Profile
Arun J	AJ	arunj@123gmail.com	<input checked="" type="checkbox"/>	System Administrator
Chatter Expert	Chatter	chatty.00d5j00000dq4hgeat3yy9pn6v4mm@chatters...	<input checked="" type="checkbox"/>	Chatter Free User
consumer 1	c1	cons143@gmail.com	<input checked="" type="checkbox"/>	Marketing Team
Integration User	integ	integration@00d5j00000dq4hgeat	<input checked="" type="checkbox"/>	Analytics Cloud Integration Us...
manager 1	m1	managerabc.abc@gmail.com	<input checked="" type="checkbox"/>	Marketing Team

[Cancel](#) | [Next](#)

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

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Setup Home Object Manager

Search Setup

Select an Expiration Option For Assigned Users

No expiration date (radio button selected)

Specify the expiration date (radio button)

Full-screen Snip

1 Day 1 Week 30 Days 60 Days Custom Date

Time Zone

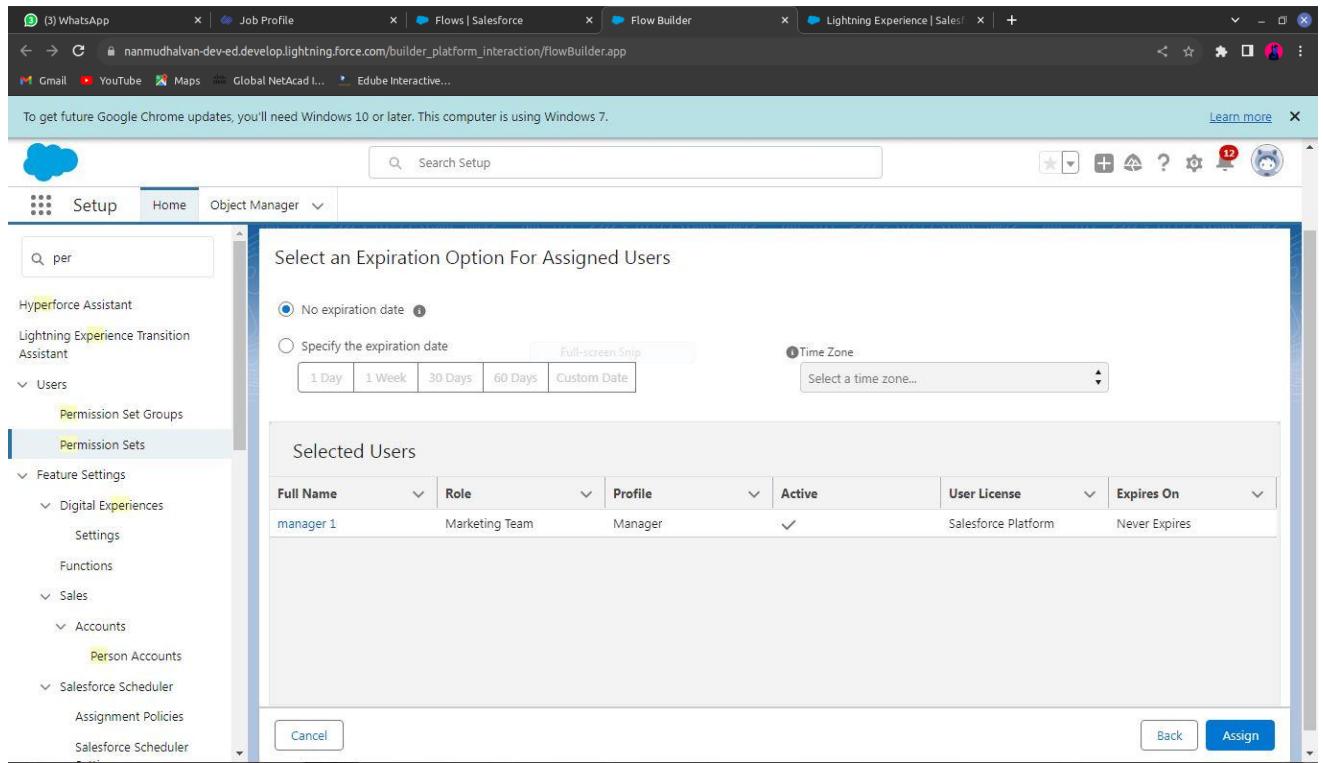
Select a time zone...

Selected Users

Full Name	Role	Profile	Active	User License	Expires On
manager 1	Marketing Team	Manager	✓	Salesforce Platform	Never Expires

Cancel Back Assign

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



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

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Setup Home Object Manager

Search Setup

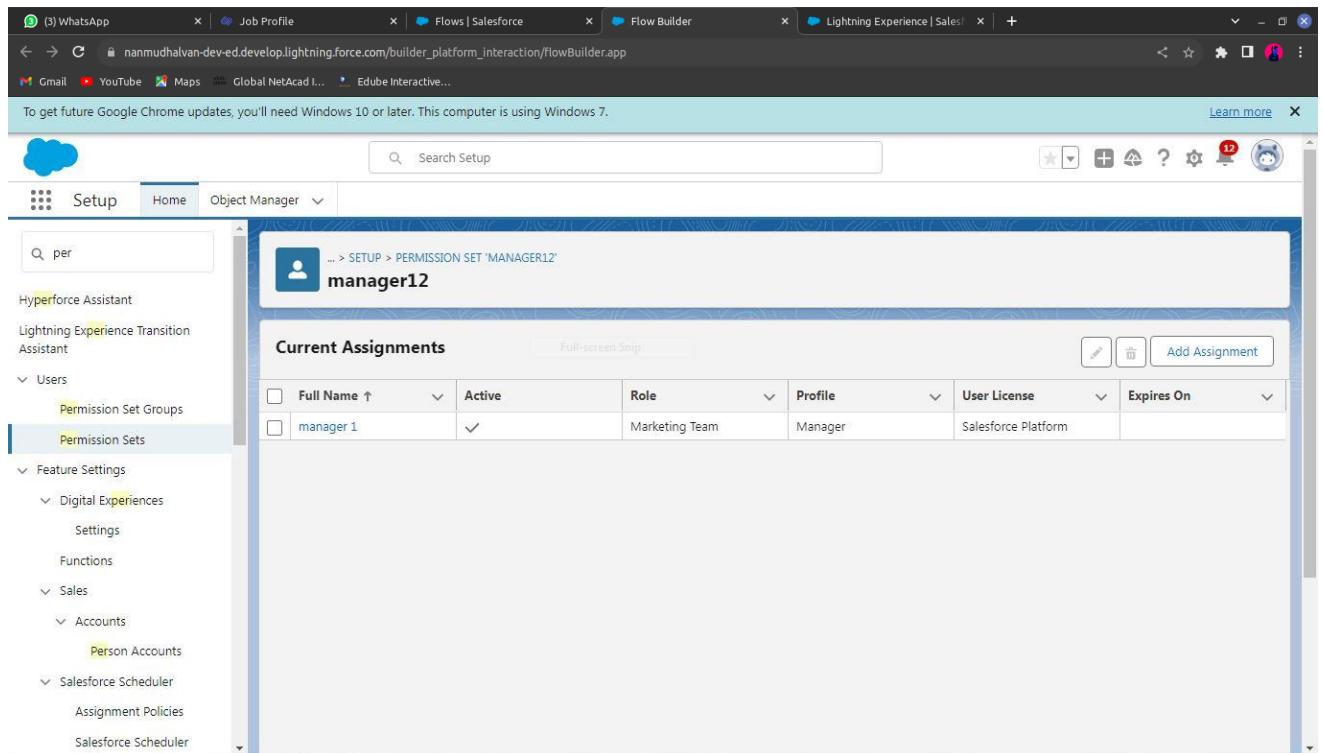
... > SETUP > PERMISSION SET 'MANAGER12' manager12

Current Assignments

Add Assignment

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

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



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

4 WhatsApp | Job Profile | New Custom Object | Salesfo | Lightning Experience | Salesfo | +

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

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

Cloud Setup Home Object Manager Search Setup

SETUP New Custom Object

New Custom Object

Help for this Page

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

Custom Object Definition Edit

Save Save & New Cancel

Custom Object Information

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

Label Example: Account

Plural Label Example: Accounts

Starts with vowel sound

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

Object Name Example: Account

Description

Context-Sensitive Help Setting

Open the standard Salesforce.com Help & Training window

Open a window using a Visualforce page

Content Name

Enter Record Name Label and Format

The Record Name appears in many favorite, key site, 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.

Setup Home Object Manager

Cloud Search Setup

Help for this Page

Help for this Page

22:47

4 WhatsApp | Job Profile | Home | Salesforce | Lightning Experience | Salesfo | +

nanmudhalvan-dev-ed.lightning.force.com/lightning/setup/customTabs/page?address=%2Fsetup%2Fui%2FobjectCustomTabWizard.jsp%3FretURL%3D%252F01i5h00000jo7D%253Fset...

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

Cloud Setup Home Object Manager Search Setup

SETUP Tabs

New Custom Object Tab

Help for this Page

Step 1. Enter the Details

Step 1 of 3

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

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

Object Tab Style 

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

Splash Page Custom Link

Enter a short description.

Description

Next Cancel

tabs

User Interface

Rename Tabs and Labels

Tabs

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

Cloud Search Setup

Help for this Page

Help for this Page

22:48

WhatsApp | Job Profile | Bank | Salesforce | Lightning Experience | Sales...

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

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

Cloud | Search Setup | Home | Object Manager

SETUP > OBJECT MANAGER

Bank

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

Edit | Delete

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/015h000000j07D/Details/view

Bank | Salesforce - Google... arun4 22:48

WhatsApp | Job Profile | New Custom Object | Sales...

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

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

Cloud | Search Setup | Home | Object Manager

SETUP

New Custom Object

New Custom Object

Help for this Page

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

Custom Object Definition Edit

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 new 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.

Cloud | Search Setup | Home | Object Manager

New Custom Object | Sales... arun4 22:48

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

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To get future Google Chrome updates, you'll need Windows 10 or later. This computer is using Windows 7. [Learn more](#)

Cloud icon | Search Setup | Setup | Home | Object Manager | [Full-screen Snip](#)

SETUP > OBJECT MANAGER Customer

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Specify the type of information that the custom field will contain.

Data Type

None Selected Select one of the data types below.

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

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

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

Lookup Relationship Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a 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

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

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Cloud icon | Search Setup | Setup | Home | Object Manager | [Full-screen Snip](#)

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

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

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

Cloud Search Setup Object Manager

Setup Home Object Manager

Search Setup

Profiles

Standard Platform User

Full-screen Snip 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.

Profile Detail

Name: Standard Platform User

User License: Salesforce Platform

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

Modified By: Arun J. 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]

Hyperforce Assistant

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

Cloud Search Setup Object Manager

Setup Home Object Manager

Search Setup

Profiles

Clone Profile

Full-screen Snip 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

Hyperforce Assistant

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Search Setup

Setup Home Object Manager

Hyperforce Assistant

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Feature Settings Data.com

Prospector Preferences Prospector Users

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Marketing Lead Processes

Sales Products

Asset Settings

SETUP Profiles

Management

Set the permissions and page layouts for this profile.

Profile Edit

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

Custom App Settings

	Visible	Default	Visible	Default	
Analytics Studio (standard_Insights)	<input type="checkbox"/>	<input 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

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

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

Search Setup

Setup Home Object Manager

Hyperforce Assistant

Users Profiles

Data Mass Transfer Approval Requests

Feature Settings Data.com

Prospector Preferences Prospector Users

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Marketing Lead Processes

Sales Products

Asset Settings

SETUP Profiles

Contact Point Consents

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

Streaming Channels

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

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 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

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

Setup Home Object Manager

user

Users

Permission Set Groups

Permission Sets

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Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Service

Embedded Service

Messaging for In-App and Web User

SETUP Users

New User

General Information

First Name: manager

Last Name: bank

Alias: mbank

Email: managerbank@gmail.com

Username: managerbank@gmail.com

Nickname: User1697625040398307733

Title:

Company:

Department:

Division:

Role: <None Specified>

User License: Partner App Subscription

Profile: Partner App Subscription User

Active:

Marketing User:

Offline User:

Knowledge User:

Flow User:

Service Cloud User:

Site.com Contributor User:

Site.com Publisher User:

WDC User:

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Users

Profiles

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SETUP Profiles

Sales Manager

Profile Edit

Name: Sales Manager

User License: Salesforce Platform

Custom Profile:

Description:

Custom App Settings

Analytics Studio (standard_Insights) Visible: Default:

App Launcher (standard_AppLauncher) Visible: Default:

My-app (Myapp) Visible: Default:

Platform (standard_Platform) Visible: Default:

WDC (standard_Work) Visible: Default:

Service Provider Access

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Profiles

SETUP 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
Bank	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
College	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Department	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Details	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: --None--

Password Policies

User passwords expire in: 90 days

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Users Profiles

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New User

User Edit

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General Information

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

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Cloud icon | Search Setup | Home | Object Manager | Setup

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

Permission Sets

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

All Permission Sets | Edit | Delete | Create New View | New | [Print](#)

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 Experience Profile Manager	Lets users create, read, edit, and delete locations, subloca...	Salesforce
<input type="checkbox"/>	Facility Manager	Lets users create, read, edit, and delete locations, subloca...	Facility Manager

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Permission Sets

managerbanksales

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

Permission Set Overview

Description	API Name	Namespace Prefix
Session Activation Required <input type="checkbox"/>	Created By Arun J 18/10/2023, 4:06 pm	Last Modified By Arun J 18/10/2023, 4:06 pm
Permission Set Groups Added To 0		

Apps

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

Assigned Connected Apps
Settings that specify which connected apps are visible in the app menu

Object Settings
Permissions to access objects and fields, and settings such as tab availability

App Permissions
Permissions to perform app-specific actions, such as "Manage Call Centers"

Apex Class Access

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Salesforce Scheduler

SETUP

Permission Sets

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

Permission Set Overview > Object Settings Accounts

Save | Cancel

Accounts

Object Permissions

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

Field Permissions

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

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Accounts

Person Accounts

Salesforce Scheduler

Assignment Policies

Salesforce Scheduler

All Users

1 item selected

Search this list...

Full Name	AI...	Username	Role	A...	Profile
Arun J	AJ	arun@123gmail.com	<input checked="" type="checkbox"/>		System Administrator
Chatter Expert	Chatter	chatty.00d5j00000dq4hgeat3yy9pn6v4mm@c...	<input checked="" type="checkbox"/>		Chatter Free User
consumer 1	c1	cons143@gmail.com	<input checked="" type="checkbox"/>		Marketing Team
Integration User	integ	integration@00d5j00000dq4hgeat.com	<input checked="" type="checkbox"/>		Analytics Cloud Integration User
manager 1	m1	managerabc.abc@gmail.com	<input checked="" type="checkbox"/>		Marketing Team
manager 2	m2	managerxyz.123@gmail.com	<input checked="" type="checkbox"/>		Manager
manager bank	mbank	managerbank123@gmail.com	<input checked="" type="checkbox"/>		Salesforce API Only System Integratio...

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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

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