

CRM Practical 3

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Batch. E1

Roll no. 09

TASK 1:

Create a Profile "Customer Care". Create a New User "Bunty Modi" under that profile.

Step1: Create a Profile - "Customer Care"

1. From Setup, enter Profiles in Quick Find, then select Profiles.
2. Clone the System Administrator profile.

The screenshot shows the Salesforce Setup interface with the following details:

- Page Header:** 07:04 - CRM Practical Assignment, Profiles | Salesforce
- Search Bar:** Search Setup
- Sidebar:** Setup, Home, Object Manager, Profiles (circled in red)
- Page Title:** SETUP Profiles
- Section:** Profiles
- Buttons:** All Profiles, Edit, Delete, Create New View
- Table Headers:** Action, Profile Name, User License, Custom
- Table Data:** A list of profiles including Minimum Access - Salesforce, Partner App Subscription User, Partner Community Login User, Partner Community User, Read Only, Salesforce API Only System Integrations, Silver Partner User, Solution Manager, Standard Platform User, Standard User, System Administrator (selected and highlighted in blue), and Work.com Only User.
- Page Footer:** Page 1 of 1, ENG IN, 10:21 PM, 08-09-2023

3. Give the profile a name to identify the type of user.

The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected. A search bar at the top left contains 'profile'. The main content area is titled 'Clone Profile' and displays a dialog box. The dialog has fields for 'Existing Profile' (System Administrator), 'User License' (Salesforce), and 'Profile Name' (Customer Care). A red circle highlights the 'Save' button at the bottom right of the dialog. The status bar at the bottom right shows '10:22 PM 08-09-2023'.

4. Save your changes.

Step2: Create a New User - "Bunty Modi"

1. From Setup, in the Quick Find box, enter Users , and then select Users.
2. Click New User.

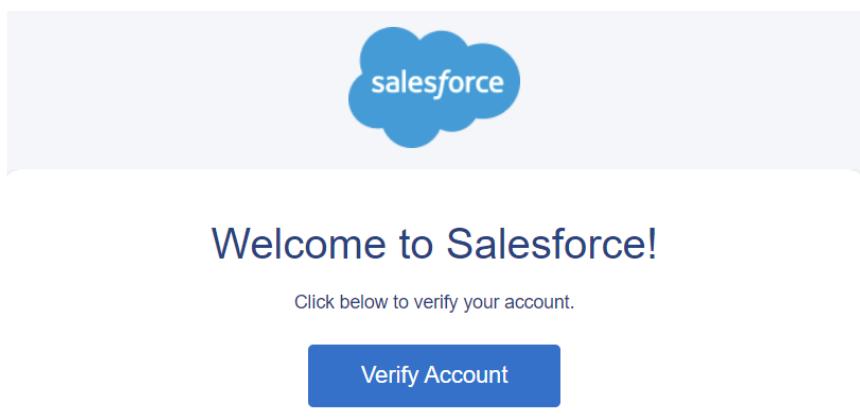
The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. A search bar at the top left contains 'user'. The main content area is titled 'All Users' and displays a list of users. A red circle highlights the 'New User' button at the top left of the list. The status bar at the bottom right shows '10:23 PM 08-09-2023'.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Chatter Expert	Chatter	chatty@00d50000c7udvea3.o8yusrtr0g@chatter.salesforce.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	Hargunani Harsha	HHarg	harsha@bts.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	jls_user1	ujls	harsha@jls.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Standard User
<input type="checkbox"/>	User_Integration	integ	integration@00d5@00000c7udvea3.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	User_Security	sec	insightssecurity@00d5@00000c7udvea3.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Security User

3. Enter the user's name and email address and a unique username in the form of an email address.
4. Select a User License - Salesforce. The user license determines which profiles are available for the user.

The screenshot shows the Salesforce Setup interface under the 'Users' section. A user named 'Bunty Modi' is being edited. In the 'User Edit' screen, the 'User License' dropdown is set to 'Salesforce' and the 'Profile' dropdown is set to 'Customer Care'. Both of these fields are circled in red. The right sidebar displays the user's profile picture, name, and email, along with options for 'DISPLAY DENSITY' (set to 'Comfy') and 'OPTIONS'.

5. Select a profile - Customer Care, which specifies the user's minimum permissions and access settings.
6. An immediate email will be sent on the email id entered for the user to verify the account.



7. Reset the password using the link.

sure to include at least:

- 8 characters
- 1 letter
- 1 number

* New Password

 Good

* Confirm New Password

 Match

Security Question

In what city were you born?

* Answer

Change Password

Assignment Ques

Q1. There are two Users "Hari Modi", "Krishna Modi". They have a profile called "Agent".

Ans.

Step1: Create "Agent" Profile

1. From Setup, enter Profiles in Quick Find, then select Profiles.
2. Clone the System Administrator profile.

The screenshot shows the Salesforce Setup interface with the following details:

- Page Header:** CRM Practical Assignment - Profiles | Salesforce
- Search Bar:** Search Setup
- Left Navigation:** Setup, Home, Object Manager, Profiles (highlighted with a red circle).
- Message Bar:** Didn't find what you're looking for? Try using Global Search.
- Section Header:** Profiles
- Buttons:** All Profiles, Edit, Delete, Create New View.
- Table:** A list of profiles with columns: Action, Profile Name, User License, and Custom. The "System Administrator" profile is selected (highlighted with a red circle) and has "Salesforce" in the User License column and a checked checkbox in the Custom column.
- Page Footer:** Page 1 of 1, with navigation links for Previous and Next.
- Bottom Bar:** Includes icons for Weather (25°C Cloudy), Search, and various browser tabs.

3. Give the profile a name to identify the type of user.

The screenshot shows the Salesforce Setup interface. In the left sidebar, under 'Profiles', the 'Profiles' tab is selected. A search bar at the top left contains the query 'profile'. The main content area is titled 'Clone Profile' and displays a message: 'You must select an existing profile to clone from.' It shows the configuration for cloning the 'System Administrator' profile, setting the 'User License' to 'Salesforce', and entering the 'Profile Name' as 'Agent'. At the bottom are 'Save' and 'Cancel' buttons.

4. Click Save.

Step2: Create new user "Hari Modi"

1. From Setup, in the Quick Find box, enter Users , and then select Users.
2. Click New User.

The screenshot shows the Salesforce Setup interface. In the left sidebar, under 'User Management Settings', the 'Users' tab is selected. A search bar at the top left contains the query 'user'. The main content area is titled 'All Users' and displays a list of existing users. A red circle highlights the 'New User' button located above the user table. The table lists users with columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The 'Active' column for all users shows a checked checkbox. The 'Profile' column lists various profiles: Chatter Free User, System Administrator, Standard User, Analytics Cloud Integration User, and Analytics Cloud Security User. At the bottom of the table are 'New User', 'Reset Password(s)', and 'Add Multiple Users' buttons.

3. Enter the user's name and email address and a unique username in the form of an email address.

Username - harimodi@agnet.com

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected in the sidebar. The main area displays the 'User Edit' screen for a user named 'Bunti Modi'. The 'General Information' section contains the following fields:

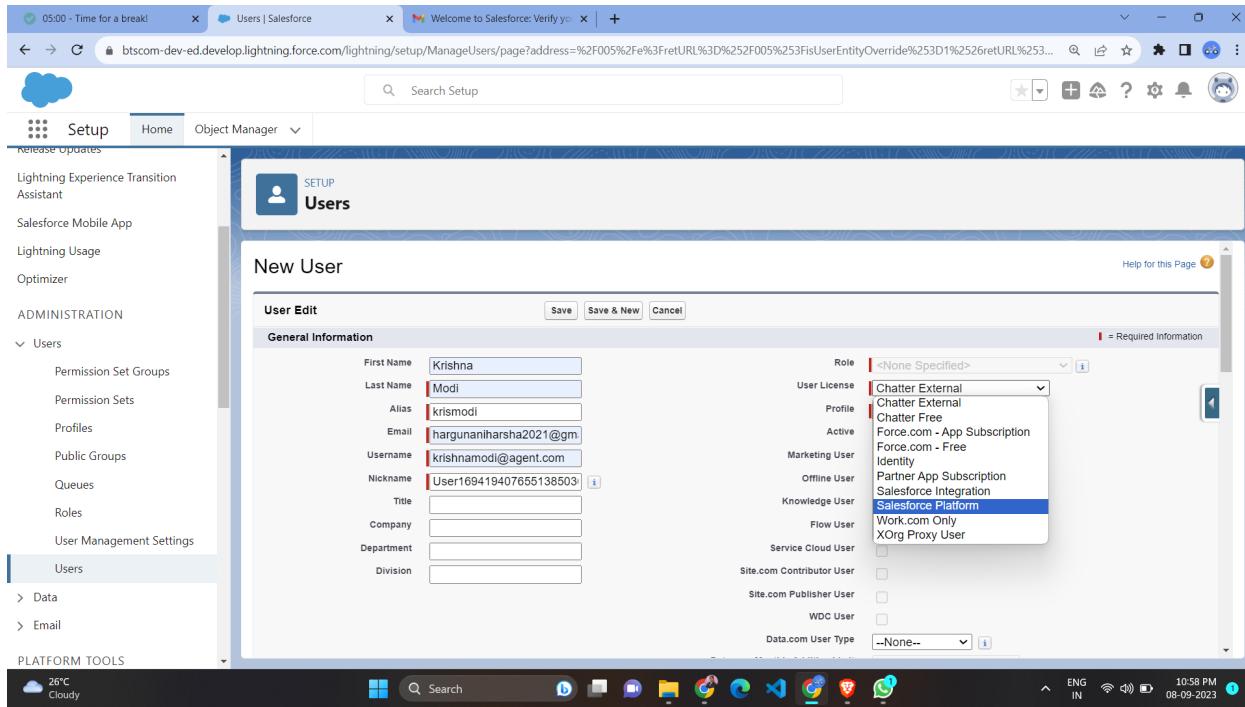
Field	Value
First Name	Hari
Last Name	Modi
Alias	harimod
Email	hargunanharsa2021@gmail.com
Username	harimodi@agent.com
Nickname	User169414961822581996
Title	Mr
Company	Student
Department	
Division	

On the right side of the screen, there is a sidebar with the user profile of 'Harsha Hargunani' and options for 'DISPLAY DENSITY' (set to 'Comfy'), 'OPTIONS' (set to 'Agent'), and links to 'Switch to Salesforce Classic' and 'Add Username'. The bottom right corner of the screen shows system status and a date/time stamp: '10:50 PM IN 08-09-2023'.

4. Select a User License - Salesforce
5. Select a Profile - Agent
6. Click "Save"

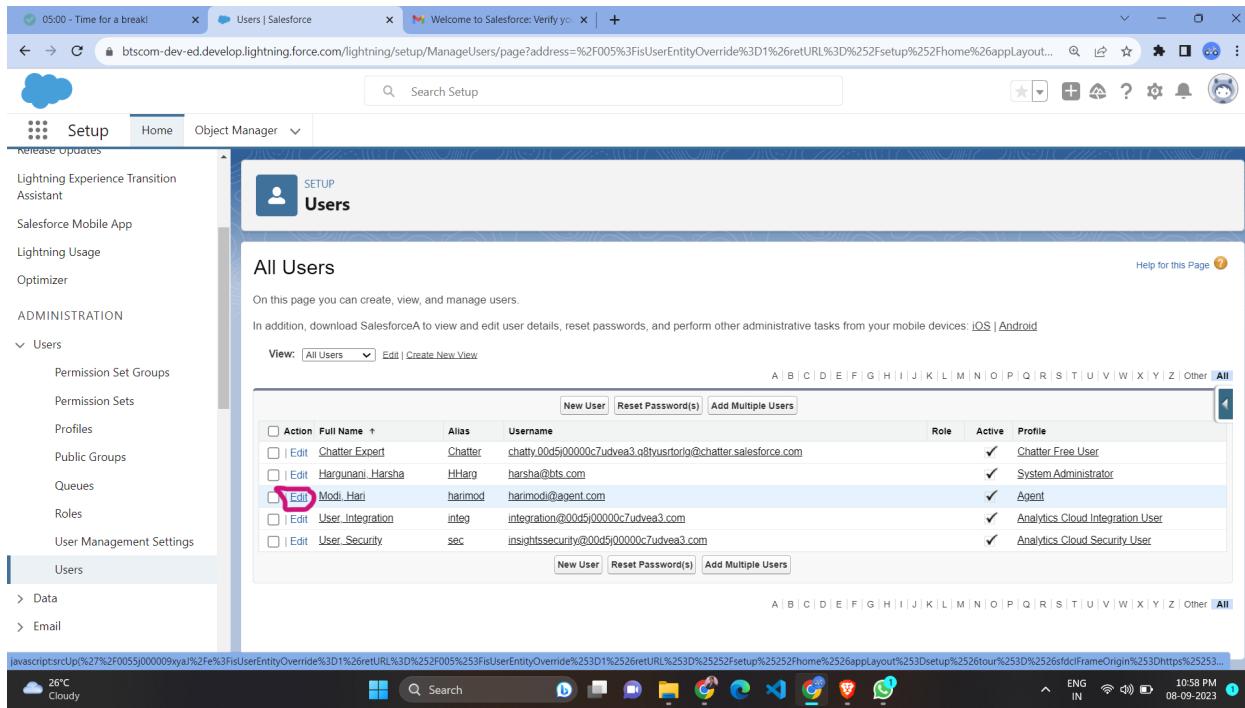
Step3: Create new user "Krishna Modi"

1. If we directly try to create a 3rd user while the previous 2 are active, we will be unable to create a 3rd user under "Salesforce License".



2. Hence, we first deactivate “Hari Modi” user, so we can create a new user.

3. Go to Users, “Edit” Hari Modi



4. Uncheck the “Active” box.

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. On the right, the 'User Edit' screen for a user named 'Hari Modi' is displayed. In the 'General Information' section, there is a checkbox labeled 'Active' which is currently checked and highlighted with a red circle. To the right of the form, there is a list of user profiles and types. A warning dialog box is overlaid on the page, providing instructions about the consequences of deactivating the user. The dialog includes an 'OK' button at the bottom.

The above warning appears when we uncheck the box. Click “OK”.

5. Save the changes.
6. Try to create a new user “Krishna Modi”.

The screenshot shows the Salesforce Setup interface under the 'Users' section. A new user is being created with the following details:

- General Information:**
 - First Name: Krishna
 - Last Name: Modi
 - Alias: krismodi
 - Email: harguniharsha2021@gmail.com
 - Username: krishnamodi@agent.com
 - Nickname: User169419416347361059
 - Title:
 - Company:
 - Department:
 - Division:
- Role:** <None Specified>
- User License:** Salesforce (highlighted)
- Profile:** Agent (highlighted)
- Active:** checked
- Marketing User:** unchecked
- Offline User:** unchecked
- Knowledge User:** unchecked
- Flow User:** unchecked
- Service Cloud User:** unchecked
- Site.com Contributor User:** unchecked
- Site.com Publisher User:** unchecked
- WDC User:** unchecked
- Data.com User Type:** -None-

Now "Salesforce" is available under the Salesforce License, and hence we can assign the "Agent" profile to this user.

Username - krishnamodi@agent.com

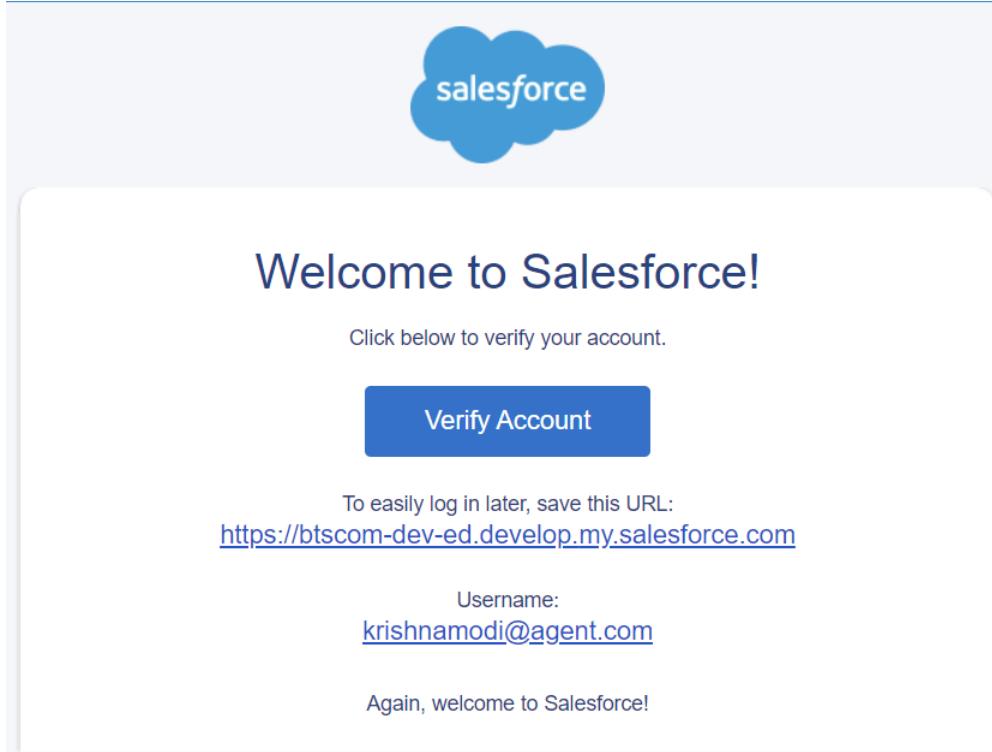
7. Save the changes.

8. Now we can see both the users are created successfully under Agent profile.

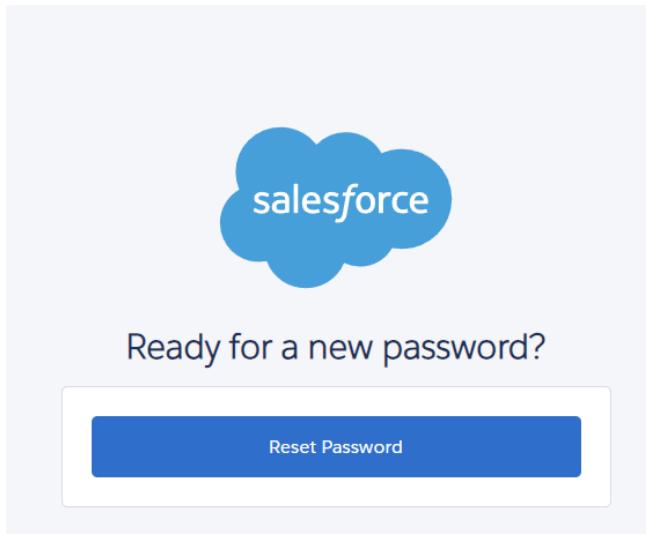
The screenshot shows the 'All Users' list in the Salesforce Setup interface. The users listed are:

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00d5j00000c7udvea3.g8lyusr0rlg@chatter.salesforce.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	Harsh Hargunani	HHarg	harsha@bts.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	Modi, Hari	harimod	harimodi@agent.com	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Agent
<input type="checkbox"/> Edit	Modi, Krishna	krismodi	krishnamodi@agent.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Agent
<input type="checkbox"/> Edit	User, Integration	Integ	integration@00d5j00000c7udvea3.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User, Security	sec	insightssecurity@00d5j00000c7udvea3.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Security User

9. User verification email will be sent. Click on "Verify Account".



10. Click on "Reset password" and generate a new password for the user.





Change Your Password

Enter a new password for **krishnamodi@agent.com**.

Make sure to include at least:

- 8 characters
- 1 letter
- 1 number

* New Password

.....Good

* Confirm New Password

.....Match

Security Question

▼In what city were you born?

* Answer

Seoul

Change Password

Password was last changed on 08/09/2023, 11:03 pm.

Q2. There are three users “Jay Modi” , “Shree Modi”, “Ram Modi” under Profile “Regional Manager”.

Ans. Follow the same steps as demonstrated earlier. Result:

The screenshot shows the Salesforce 'Profiles' page. A sidebar on the left says 'Manager'. The main area shows a profile card for 'Harsha Hargunani' with the URL 'btscom-dev-ed.develop.my.salesforce.com'. The profile name is 'Regional Manager'. Under 'Profile Detail', it shows 'Name: Regional Manager', 'User License: Salesforce', 'Description: ', 'Created By: Harsha Hargunani 09/09/2023, 12:09 am', and 'Modified By: Harsha Hargunani 09/09/2023, 12:09 am'. Below this is a 'Custom Profile' section with a dropdown set to 'Custom Profile'. On the right, there's a 'DISPLAY DENSITY' section with 'Comfy' selected, and options to switch to 'Salesforce Classic' or 'Add Username'.

The screenshot shows the Salesforce 'Users' page. A sidebar on the left says 'Manager'. The main area shows a table titled 'All Users' with the heading 'New User | Reset Password(s) | Add Multiple Users'. The table lists users with columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The users listed are: Modi_Hari (harimod@agent.com), Modi_Krishna (krismodi@agent.com), User_Integration (integ@00d5j00000c7udvea3.com), User_Security (sec@insightssecurity@00d5j00000c7udvea3.com), Chatter_Expert (Chatter@00d5j00000c7udvea3.g@yusrtrig@chatter.salesforce.com), Modi_Jai (jaimodi@regionalmanager.com), Modi_Shree (shrimodi@regionalmanager.com), Modi_Ram (rammodi@regionalmanager.com), and Hargunani_Harsha (HHarsh@bts.com). The 'Profile' column shows various user types like Agent, Analytics Cloud Integration User, etc.

TASK 2:

Pan Card must be mandatory for Bunty and not for other users.

Step1: Note the userID of user Bunty Modi.

User Bunty Modi

Authentication Settings for External Systems

Alias	buntymodi	User License	Salesforce
Email	hargunaniharsha2021@gmail.com [Verify]	Profile	Customer Care
Username	buntymodi@customercare.com	Active	<input checked="" type="checkbox"/>
Nickname	User16941996752506683180	Marketing User	<input type="checkbox"/>
Title	Mr	Offline User	<input type="checkbox"/>
Company	Student	Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	<input type="checkbox"/>
Delegated Approver		Data.com User Type	<input type="checkbox"/>
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/>
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/>
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/>
App Registration: One-Time Password		Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>

25°C Near record ENG IN 12:33 AM 09-09-2023

Step2: Under the object where the PAN Card field exists, create a new validation rule.

SETUP > OBJECT MANAGER

Student Details

Fields & Relationships

Field Label	Name	Type
Branch	Branch__c	Picklist
Created By	CreatedById	Lookup(User)
DOB	DOB__c	Date
First Name	First_Name__c	Text(35)
Last Modified By	LastModifiedById	Lookup(User)
Last Name	Last_Name__c	Text(35)
Owner	OwnerId	Lookup(User,Group)
PAN Number	PAN_Number__c	Text(10) (Unique Case Insensitive)
Student Full Name	Student_Full_Name__c	Formula (Text)
StudentID	Name	Auto Number

https://btscom-dev-ed.develop.lightning.force.com/one/one.app#/setup/ObjectManager/0115j000002JOkw/ValidationRules/view

25°C Cloudy ENG IN 12:44 AM 09-09-2023

Step3: Enter the correct User.Id obtained in the previous step in single quotes-

Rule name: Pan_number_mandatory_for_user_BM

Error Condition Rule: AND(ISBLANK(PAN_Number_c), \$User.Id='0055....VA ')

Error Message: User Bunty Modi, you must enter PAN number to proceed.

Step4: Click on “check syntax” before proceeding further to ensure the entered formula is correct.

The screenshot shows the Salesforce Object Manager interface for the 'Student Details' object. A validation rule named 'Pan_number_mandatory_for_user_BM' is being edited. The formula is set to AND (ISBLANK(PAN_Number__c), \$User.Id='0055j000009y0VAAY'). The formula editor includes a dropdown for functions like ABS, ACOS, ADDMONTHS, AND, ASCII, ASIN, and others.

Setup Home Object Manager

Search Setup

Harsha Hargunani
btscm-dev-ed.develop.my.salesforce.com
Settings Log Out

DISPLAY DENSITY

✓ Comfy

Compact

OPTIONS

Switch to Salesforce Classic Add Username

Operators & Functions

Required Information

Student Details Validation Rule

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

Validation Rule Edit

Rule Name: Pan_number_mandatory_for_user_BM

Active:

Description:

Error Condition Formula

Example: Discount_Percent_c<0.30 More Examples

If this formula expression is true, display the text defined in the Error Message area

Insert Field Insert Operator

AND (ISBLANK(PAN_Number__c), \$User.Id='0055j000009y0VAAY')

Functions

-- All Function Categories --

- ABS
- ACOS
- ADDMONTHS
- AND
- ASCII
- ASIN

25°C Cloudy ENG IN 12:53 AM 09-09-2023

Step5: Set Error Location as “Field”, and select “PAN Number” as Branch.

AND (ISBLANK(PAN_Number__c), \$User.Id='0055j000009y0VA')

AND
ASCII
ASIN

ABS(number)
Returns the absolute value of a number, a number without its sign

Check Syntax No errors found

Error Message

Example: Discount percent cannot exceed 30%
This message will appear when Error Condition formula is true

Error Message User Bunty Modi, you must enter PAN number to proceed.

This error message can either appear at the top of the page or below a specific field on the page

Error Location Top of Page Field PAN Number

Save Save & New Cancel

Step6: Click "Save".

Step7: Login Bunty Modi User in new incognito window.

To access this page, you have to log in to Salesforce.

Username

buntymodi@customercare.com

Password

.....

Log In

Remember me

[Forgot Your Password?](#)

Step8: Navigate to the App and Tab Student and enter a new record.

The screenshot shows the Salesforce Lightning interface for creating a new student record. The page title is "New Student Details | Salesforce". The URL in the address bar is https://btscom-dev-ed.lightning.force.com/lightning/o/Student_Details__c/new?count=1&nooverride=1&useRecordTypeCheck=1&navigationLocation=LIST_VIEW&uid=16942025.... The main content area is titled "Information" and contains fields for "First Name" (Buntee), "Last Name" (Modi), and "Branch" (CSE - AIML). The "Owner" field is set to Bunty Modi. A note at the bottom of the form states: "User Bunty Modi, you must enter PAN number to proceed." The bottom right of the form has buttons for "Cancel", "Save & New", and "Save". The background shows a sidebar for "Students Details" and a header with various icons and navigation links.

TASK 3:

Last Name should be mandatory for Customer Care Profile.

Step1: Create a new Validation Rule under the Student Details object.

Step2: Enter the following details-

Rule name: Last_Name_must_for_customer_care

Error Condition Rule: AND(ISBLANK(Last_Name__c), \$Profile.Name='Customer Care')

Error Message: Users under "Customer Care" Profile must enter Last Name

14:32 - CRM Practical Assignment X Student Details | Salesforce X +

btcom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I5j000002JOkw/ValidationRules/new

The screenshot shows the 'Validation Rule Edit' screen for the 'Student Details' object. The rule name is 'Last_Name_must_for_customer_care'. It is active and has an empty description. The error condition formula is 'AND (ISBLANK(Last_Name), \$Profile.Name='Customer Care')'. A tooltip for 'ISBLANK' indicates it returns true if the field is blank. The formula dropdown shows functions like ABS, ACOS, ADDMONTHS, AND, ASCII, and ASIN. The error message is 'Users under "Customer Care" Profile must enter Last Name'. The 'Error Location' is set to 'Field' and 'Last Name'. The status bar at the bottom shows '24°C Rain' and the date '09-09-2023'.

Step3: Set Error Location as "Field", and select "Last Name" as Branch.

14:24 - CRM Practical Assignment X Student Details | Salesforce X +

btcom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I5j000002JOkw/ValidationRules/new

The screenshot shows the 'Validation Rule Edit' screen for the 'Student Details' object. The rule name is 'Last_Name_must_for_customer_care'. It is active and has an empty description. The error condition formula is 'AND (ISBLANK(Last_Name), \$Profile.Name='Customer Care')'. A tooltip for 'ISBLANK' indicates it returns true if the field is blank. The formula dropdown shows functions like ABS, ACOS, ADDMONTHS, AND, ASCII, and ASIN. The error message is 'Users under "Customer Care" Profile must enter Last Name'. The 'Error Location' is set to 'Field' and 'Last Name'. The status bar at the bottom shows '24°C Rain' and the date '09-09-2023'.

Step4: Click "Save"

The screenshot shows the Salesforce Object Manager interface. At the top, there are tabs for 'Setup' and 'Object Manager'. The main content area is titled 'Student Details Validation Rule'. It displays a table with the following data:

Validation Rule Detail	
Rule Name	Last_Name_must_for_customer_care
Error Condition Formula	AND(ISBLANK(Last_Name__c), \$Profile.Name='Customer Care')
Error Message	Users under "Customer Care" Profile must enter Last Name
Description	
Created By	Harsha Hargunani, 09/09/2023, 1:27 am
Modified By	Harsha Hargunani, 09/09/2023, 1:27 am

At the bottom of the page, there are 'Edit' and 'Clone' buttons. The status bar at the bottom right shows 'ENG IN' and the date '09-09-2023'.

Step5: Login Bunty Modi User in a new incognito window and navigate to the student tab.

The screenshot shows the 'Student Details' page in a new incognito window. The user 'Bunty Modi' is attempting to save a record. A validation error message 'We hit a snag.' is displayed, stating 'Review the following fields • Last Name'. The 'Last Name' field is highlighted in red, indicating it is required. The 'Branch' field is also highlighted in yellow. The status bar at the bottom right shows 'ENG IN' and the date '09:30 AM 09-09-2023'.

Note: Since User Bunty Modi has a profile of customer care, leaving the Last Name field empty results in an error message appearing next to the field.

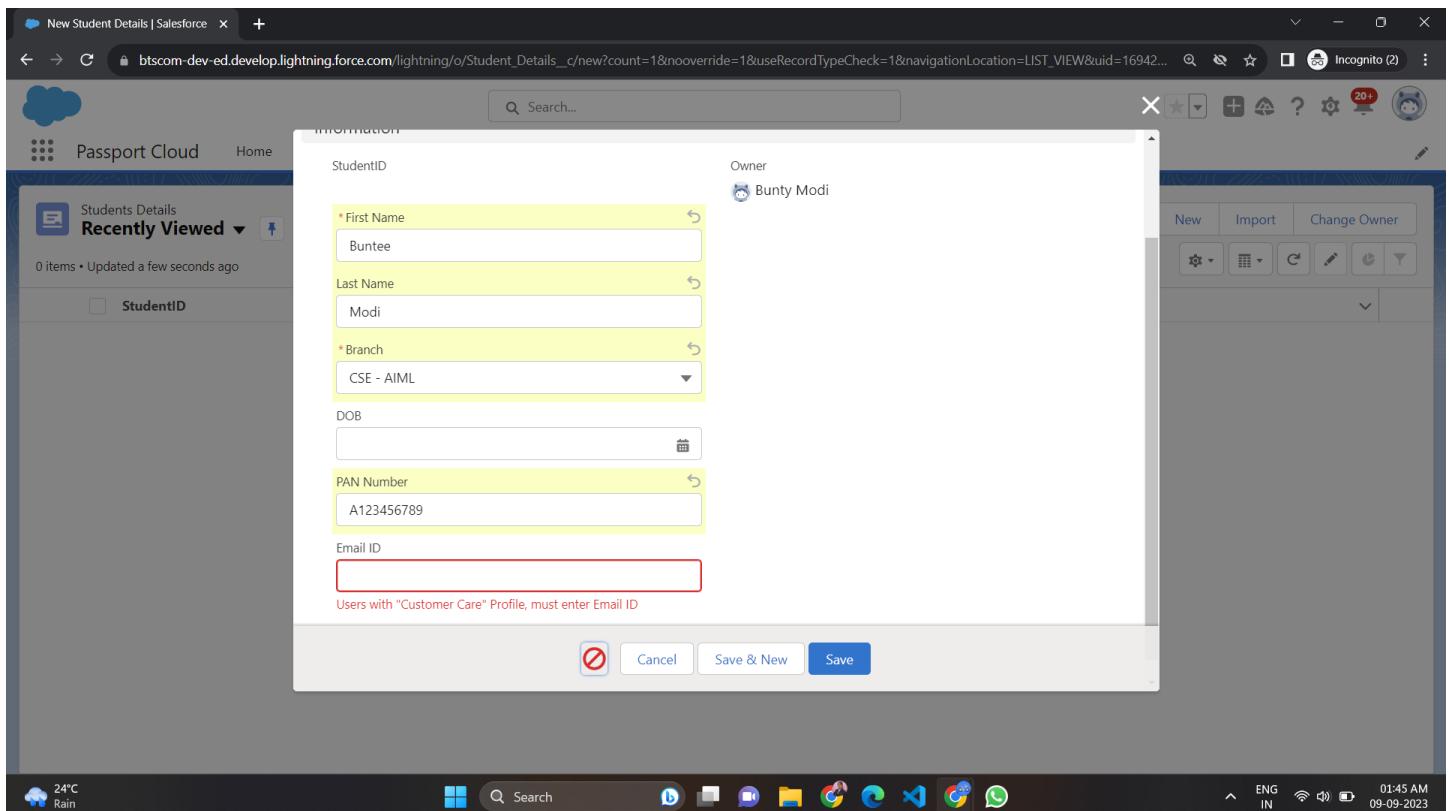
Assignment Ques:

Q3. Lead Email Id is Mandatory for "Customer Care" Profile.

Ans. Create a new Validation Rule

The screenshot shows the Salesforce Object Manager interface. A validation rule named 'Email_must_for_customer_care_profile' is displayed. The rule is active and has the formula: AND(ISBLANK(Email_ID__c), \$Profile Name='Customer Care'). The error message is: 'Users with "Customer Care" Profile, must enter Email ID'. The rule was created by Harsha Hargunani on 09/09/2023 at 1:37 am. The validation rule detail page includes 'Edit' and 'Clone' buttons. On the right, a user profile sidebar shows Harsha Hargunani's details, including a GitHub icon, email, and a 'Comfy' display density setting. The bottom of the screen shows a taskbar with various application icons and system status.

The screenshot shows the Salesforce login page. It features the blue cloud logo with the word 'salesforce' on it. A message says 'To access this page, you have to log in to Salesforce.' Below it is a 'Username' field containing 'buntymodi@customercare.com'. There is a 'Password' field with several dots. A large blue 'Log In' button is centered below the fields. At the bottom left is a 'Remember me' checkbox, and at the bottom right is a link to 'Forgot Your Password?'



TASK 4:

Page Layouts are used to decorate detailed pages.

05:00 - Time for a break! Student Details | Salesforce Inbox (1,299) - hargunanharsa2 Salesforce lightning. How to cha... +

24°C Rain

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Student 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

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields

	DOB	Last Name	StudentID
Section			
Blank Space	Email ID	Owner	
Branch	First Name	PAN Number	
Created By		Last Modified By	Student Full Name

Student Details Detail

Standard Buttons: Edit, Delete, Clone, Change Owner, Change Record Type, Printable View, Sharing, Sharing Hierarchy

Custom Buttons:

Information (Header visible on edit only)

Field	Value
StudentID	GEN-2004-001234
First Name	Sample Text
Last Name	Sample Text
Branch	Sample Text
DOB	09/09/2023
Student Full Name	Sample Text
PAN Number	Sample Text
Email ID	sarah.sample@company.com

Owner: Sample Text

Section Properties

25°C Rain

ENG IN 01:56 AM 09-09-2023

05:00 - Time for a break! Student Details | Salesforce Inbox (1,299) - hargunaniharsha2 Salesforce lightning- How to cha +

btcom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115j000002JOkw/PageLayouts/00h5j00000BFj8bAAD/view

Setup Home Object Manager

SETUP > OBJECT MANAGER Student 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

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields Buttons Quick Actions Mobile & Lightning Actions Expanded Lookups Related Lists Report Charts

Quick Find Field Name * Section Blank Space Branch Created By

Section Properties

Section Name Information Display Section Header On Detail Page Edit Page

Layout Tab-key Order

1-Column 2-Column Left-Right Top-Down

Information (Header visible on edit only)

StudentID GEN-2004-001234 First Name Sample Text Last Name Sample Text Branch Sample Text DOB 09/09/2023 Student Full Name PAN Number Email ID sarah.sample@company.com

Sharing Hierarchy Custom Buttons

https://btcom-dev-ed.develop.my.salesforce.com/layouteditor/layoutEditor.apexp?type=0115j000002JOkw&id=00h5j00000BFj8bAAD&retURL=%2Fsetup%2FObjectManager%2F0115j000002JOkw%2FPageLayouts%2Fview&appLayout=setup&tour=&isdtp=p1&sfdcFrameOrigin=h...

25°C Rain ENG IN 01:56 AM 09-09-2023

Can set Fields Mandatory

23:42 - CRM Practical Assignment Student Details | Salesforce Inbox (1,299) - hargunaniharsha2 Salesforce lightning- How to cha +

btcom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115j000002JOkw/PageLayouts/00h5j00000BFj8bAAD/view

Setup Home Object Manager

SETUP > OBJECT MANAGER Student 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

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields Buttons Quick Actions Mobile & Lightning Actions Expanded Lookups Related Lists Report Charts

Quick Find Field Name * Section Blank Space Branch Created By DOB Last Name StudentID Email ID Owner First Name PAN Number Last Modified By Student Full Name

Field Properties

PAN Number Read-Only Required

OK Cancel

Information (Header visible on edit only)

StudentID GEN-2004-001234 First Name Sample Text Last Name Sample Text Branch Sample Text DOB 09/09/2023 Student Full Name PAN Number Email ID sarah.sample@company.com

System Information (Header visible on edit only)

Created By Sample Text Last Modified By Sample Text

Custom Links (Header visible on edit only)

https://btcom-dev-ed.develop.my.salesforce.com/layouteditor/layoutEditor.apexp?type=0115j000002JOkw&id=00h5j00000BFj8bAAD&retURL=%2Fsetup%2FObjectManager%2F0115j000002JOkw%2FPageLayouts%2Fview&appLayout=setup&tour=&isdtp=p1&sfdcFrameOrigin=h...

25°C Rain ENG IN 02:16 AM 09-09-2023

Show Pan Card to System Administrator users only, but don't show it to Customer Care profile users.

Step1: Create a new Page Layout

The screenshot shows the Salesforce Object Manager interface for the 'Student Details' object. On the left, a sidebar lists various setup options: Details, Fields & Relationships, Page Layouts (which is highlighted with a red circle), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, and Scoping Rules. The main area is titled 'Page Layouts' and displays one item: 'Student Details Layout' created by Harsha Hargunani on 28/07/2023 at 10:49 am, last modified by Harsha Hargunani on 09/09/2023 at 1:34 am. At the top right of the main area, there are 'Quick Find', 'New' (also circled in red), and 'Page Layout Assignment' buttons. The browser's address bar shows the URL for the Object Manager. The system status bar at the bottom indicates it's 25°C Rain, ENG IN, and the date is 09-09-2023.

Step2: Select Student Layout as Existing Page Layout which has all the information available. Give a new Page Layout Name as Customer Care Layout, from which we will exclude "Pan Number".

Screenshot of the Salesforce Setup interface showing the creation of a new page layout for the 'Student Details' object.

The 'Page Layouts' section is selected in the left sidebar. The main area shows the 'Create New Page Layout' screen with the following details:

- Existing Page Layout: Student Details Layout
- Page Layout Name: Customer Care Layout

A red circle highlights the 'Save' button at the bottom of the form.

The top right corner shows the user profile of Harsha Hargunani and various setup options like 'DISPLAY DENSITY' (set to 'Comfy'), 'OPTIONS', and links to 'Switch to Salesforce Classic' and 'Add Username'.

The system status bar at the bottom indicates it's 09-09-2023, 02:22 AM, ENG IN.

Step3: Find the PAN number field and click on the remove icon in front of it.

Screenshot of the Salesforce Setup interface showing the edit screen for the 'Customer Care Layout' page.

The 'Page Layouts' section is selected in the left sidebar. The main area shows the 'Edit Page Layout' screen for 'Customer Care Layout'.

The 'Fields' section displays the following fields:

Section	Field Name	Type
Buttons	DOB	Date
Quick Actions	Email ID	Text
Mobile & Lightning Actions	Owner	Text
Expanded Lookups	First Name	Text
Related Lists	PAN Number	Text
Report Charts	Branch	Text
	Created By	Text
	Last Modified By	Text
	Student Full Name	Text

A red circle highlights the 'PAN Number' field. To its left is a small circular icon with a minus sign, indicating it can be removed.

The top right corner shows the user profile of Harsha Hargunani and various setup options like 'View profile'.

The system status bar at the bottom indicates it's 09-09-2023, 02:22 AM.

Step4: The PAN number is no longer present under the “visible” field now. Save the changes.

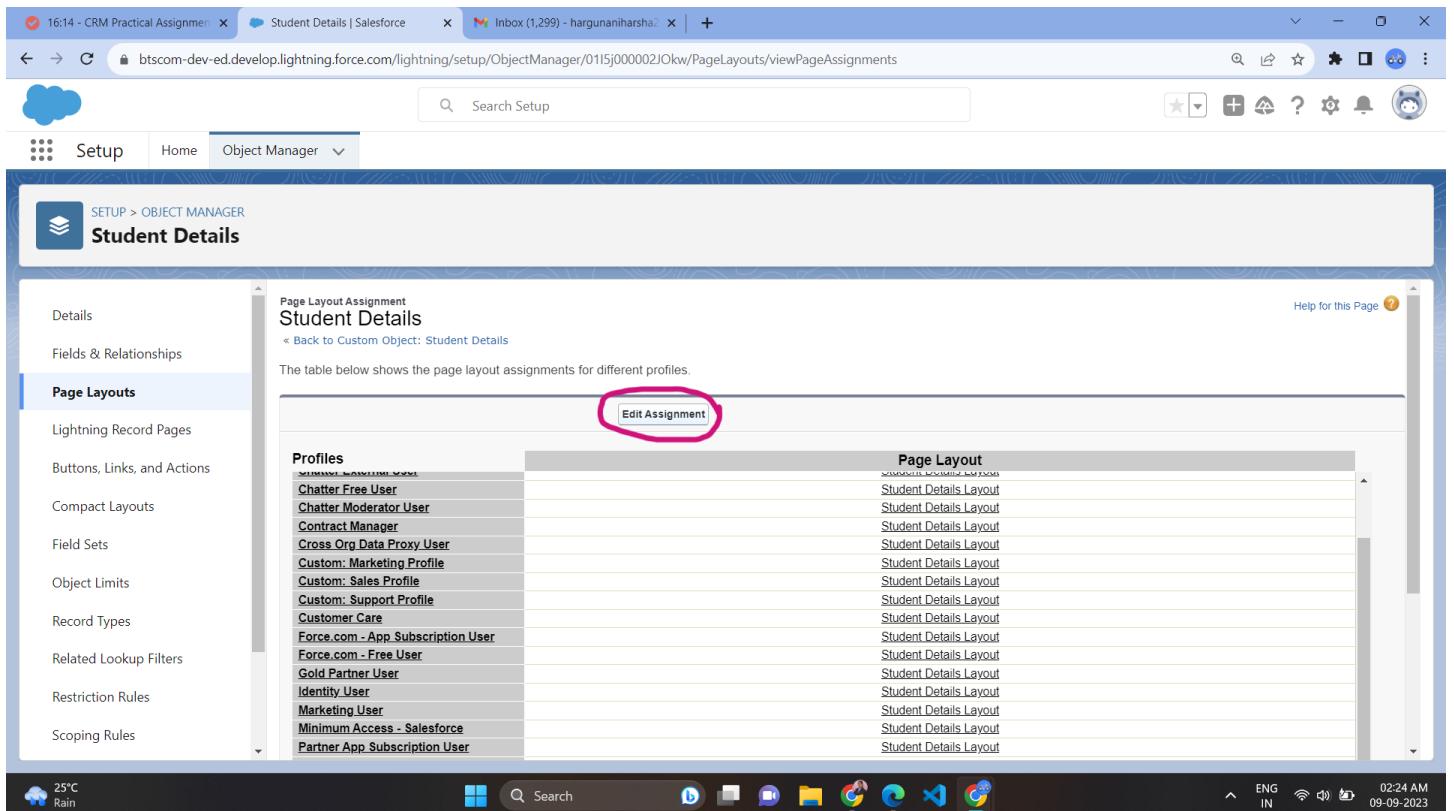
The screenshot shows the Salesforce Object Manager interface for the 'Student Details' object. The left sidebar has 'Page Layouts' selected. The main area displays the 'Fields' section of the page layout configuration. A red arrow points from the 'Visible' field for the 'PAN Number' field to the 'PAN Number' field itself, indicating it is no longer visible. The 'Information' section below shows fields like StudentID, First Name, Last Name, Branch, DOB, Student Full Name, Email ID, and Created By.

Step5: Getting back on “Page Layouts”, click on “Page Layout Assignment”.

The screenshot shows the Salesforce Object Manager interface for the 'Page Layouts' section of the 'Student Details' object. The left sidebar has 'Page Layouts' selected. The main area displays a table of page layouts. A red oval highlights the 'Page Layout Assignment' button in the top right corner of the table header.

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Customer Care Layout	Harsha Hargunani, 09/09/2023, 2:22 am	Harsha Hargunani, 09/09/2023, 2:22 am
Student Details Layout	Harsha Hargunani, 28/07/2023, 10:49 am	Harsha Hargunani, 09/09/2023, 1:34 am

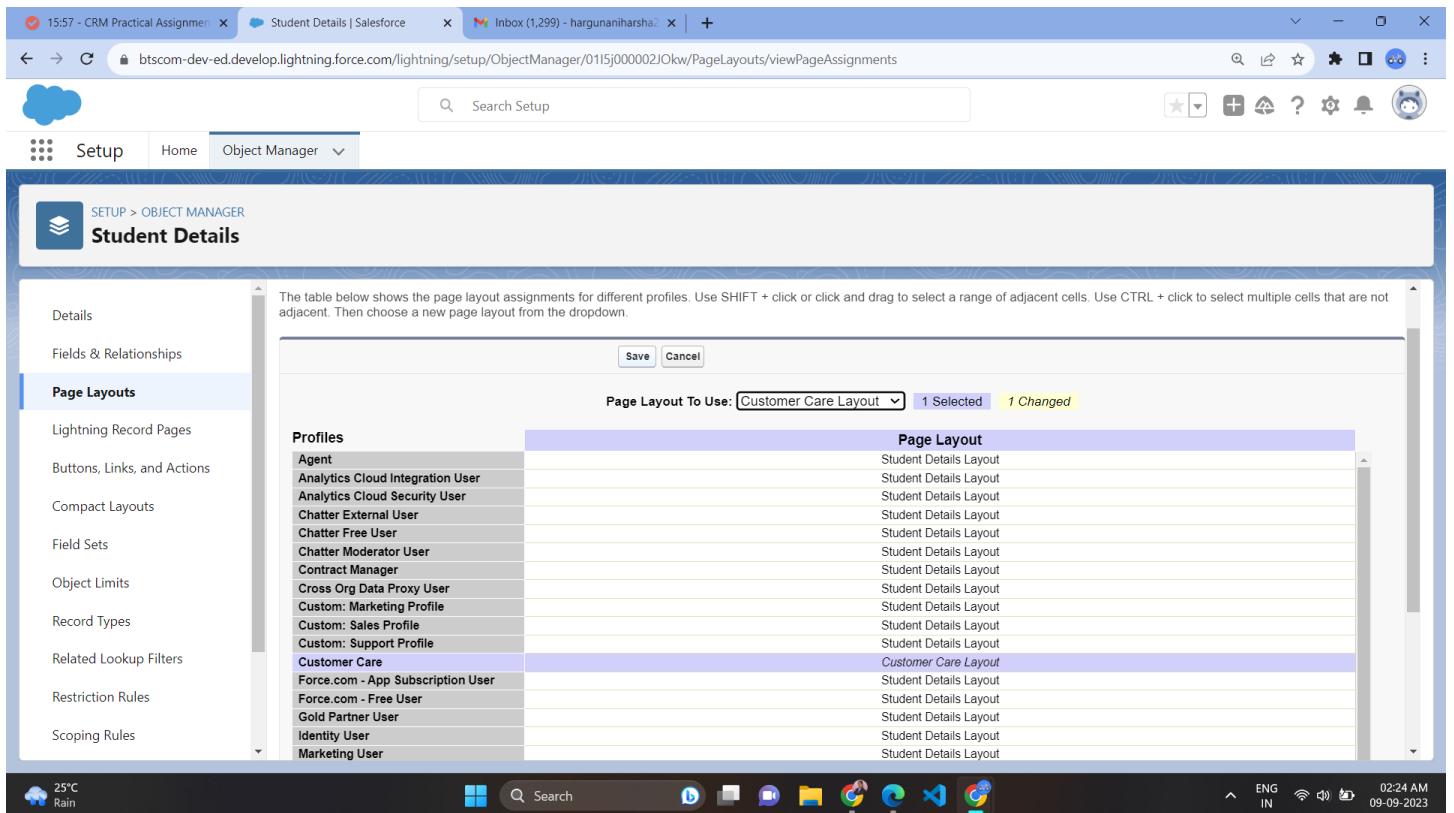
Step6: Click on "Edit Assignment".



The screenshot shows the Salesforce setup interface for managing page layout assignments. On the left, a sidebar lists various configuration options under 'Page Layouts'. The main area displays a table of profiles and their corresponding page layouts. A red circle highlights the 'Edit Assignment' button located at the top right of the table header.

Profiles	Page Layout
Chatter External User	Student Details Layout
Chatter Free User	Student Details Layout
Chatter Moderator User	Student Details Layout
Contract Manager	Student Details Layout
Cross Org Data Proxy User	Student Details Layout
Custom: Marketing Profile	Student Details Layout
Custom: Sales Profile	Student Details Layout
Custom: Support Profile	Student Details Layout
Customer Care	Student Details Layout
Force.com - App Subscription User	Student Details Layout
Force.com - Free User	Student Details Layout
Gold Partner User	Student Details Layout
Identity User	Student Details Layout
Marketing User	Student Details Layout
Minimum Access - Salesforce	Student Details Layout
Partner App Subscription User	Student Details Layout

Step7: Select "Customer Care" profile and assign it "Customer Care Layout" from the drop down menu.



The screenshot shows the same setup screen after the 'Customer Care' profile has been selected. The 'Page Layout To Use' dropdown at the top of the table is set to 'Customer Care Layout'. The table now shows that the 'Customer Care' profile is assigned to the 'Customer Care Layout'.

Profiles	Page Layout
Agent	Student Details Layout
Analytics Cloud Integration User	Student Details Layout
Analytics Cloud Security User	Student Details Layout
Chatter External User	Student Details Layout
Chatter Free User	Student Details Layout
Chatter Moderator User	Student Details Layout
Contract Manager	Student Details Layout
Cross Org Data Proxy User	Student Details Layout
Custom: Marketing Profile	Student Details Layout
Custom: Sales Profile	Student Details Layout
Custom: Support Profile	Student Details Layout
Customer Care	Customer Care Layout
Force.com - App Subscription User	Student Details Layout
Force.com - Free User	Student Details Layout
Gold Partner User	Student Details Layout
Identity User	Student Details Layout
Marketing User	Student Details Layout

Notice that System Administrator profiles have "Student Details Layout" assigned for them. Leave it as it is, since that Layout contains all fields including PAN Number.

User Profile	Page Layout Assigned
Cross Org Data Proxy User	Student Details Layout
Custom: Marketing Profile	Student Details Layout
Custom: Sales Profile	Student Details Layout
Custom: Support Profile	Student Details Layout
Customer Care	Customer Care Layout
Force.com - App Subscription User	Student Details Layout
Force.com - Free User	Student Details Layout
Gold Partner User	Student Details Layout
Identity User	Student Details Layout
Marketing User	Student Details Layout
Minimum Access - Salesforce	Student Details Layout
Partner App Subscription User	Student Details Layout
Partner Community Login User	Student Details Layout
Partner Community User	Student Details Layout
Read Only	Student Details Layout
Regional Manager	Student Details Layout
Salesforce API Only System Integrations	Student Details Layout
Silver Partner User	Student Details Layout
Solution Manager	Student Details Layout
Standard Platform User	Student Details Layout
Standard User	Student Details Layout
System Administrator	Student Details Layout
Work.com Only User	Student Details Layout

Step8: Login as Bunty Modi that is associated with "Customer Care" Profile to check the visibility of the field. PAN number is no longer shown while record creation.

The screenshot shows the 'Information' tab of a new record creation page for 'Student Details'. The fields visible are:

- First Name: (Input field)
- Last Name: (Input field)
- DOB: (Input field with calendar icon)
- Branch: (Select dropdown menu showing '--None--')
- Email ID: (Input field)

At the bottom of the form are three buttons: 'Cancel', 'Save & New', and 'Save'.

Assignment Ques

Profiles: System Administrator, Customer Care, Agent

Q4. The System Administrator can see all the Account Fields.

Ans. Step1: Go to "Object Manager" and find "Account". Click "Page Layouts".

The screenshot shows the Salesforce Object Manager interface for the Account object. The left sidebar has tabs for Details, Fields & Relationships, Page Layouts (which is circled in red), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View Button Layout. The main content area is titled 'Fields & Relationships' and lists various fields like Account Name, Account Number, Account Owner, etc., with their field labels, names, data types, and controls. A right sidebar shows user information (Harsha Hargunani) and settings for display density (Comfy), options (Compact), and switching to Salesforce Classic or adding a username. The bottom status bar shows weather (27°C, Mostly cloudy), system icons, and the date/time (09-09-2023, 12:12 PM).

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROL
Account Name	Name	Name	
Account Name	Name	Text(255)	
Account Number	AccountNumber	Text(40)	
Account Owner	OwnerId	Lookup(User)	▼
Account Site	Site	Text(80)	
Account Source	AccountSource	Picklist	▼
Active	Active__c	Picklist	▼
Annual Revenue	AnnualRevenue	Currency(18, 0)	
Billing Address	BillingAddress	Address	

Step2: We can see the default “Account Layout” assigned to System Administrator. Here all fields are visible in the Layout.

09:14 - CRM Practical Assignment | Inbox (1,300) - hargunaniharsha | Account | Salesforce

09:14 - CRM Practical Assignment | Inbox (1,300) - hargunaniharsha | Account | Salesforce

SETUP > OBJECT MANAGER

Account

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

List View Button Layout

Page Layouts
4 Items, Sorted by Page Layout Name

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Account (Marketing) Layout	Harsha Hargunani, 19/07/2023, 10:47 am	Harsha Hargunani, 19/07/2023, 10:47 am
Account (Sales) Layout	Harsha Hargunani, 19/07/2023, 10:47 am	Harsha Hargunani, 19/07/2023, 10:47 am
Account (Support) Layout	Harsha Hargunani, 19/07/2023, 10:47 am	Harsha Hargunani, 19/07/2023, 10:47 am
Account Layout	Harsha Hargunani, 19/07/2023, 10:47 am	Harsha Hargunani, 19/07/2023, 10:47 am

27°C Mostly cloudy

Search

ENG IN 12:13 PM 09-09-2023

Step3: However, not all fields are given edit access, those highlighted in gray.

09:02 - CRM Practical Assignment | Inbox (1,300) - hargunaniharsha | Account | Salesforce

09:02 - CRM Practical Assignment | Inbox (1,300) - hargunaniharsha | Account | Salesforce

SETUP > OBJECT MANAGER

Account

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

List View Button Layout

Account Layout

Save | Quick Save | Preview As... | Cancel | Undo | Redo | Layout Properties

Fields

Section	Field Name	Field Type	Label	Value
Blank Space	Account Owner	Text	Annual Revenue	Customer Priority
Blank Space	Account Site	Text	Billing Address	D&B Company
Blank Space	Account Source	Text	Einstein Account ...	Industry
Blank Space	Active	Text	Last Modified By	Number of Locations
Blank Space			Operating Hours	Phone
Blank Space			Phone	Rating
Blank Space			Rating	Shipping /
Blank Space			Shipping /	S/C Code
Blank Space			S/C Code	

Account Sample

Highlights Panel

Customize the highlights panel for this page layout...

Quick Actions in the Salesforce Classic Publisher

Post File New Task New Contact New Case Log a Call New Note New Opportunity New Event Link Poll Question Email

29°C Mostly cloudy

Search

ENG IN 12:19 PM 09-09-2023

Thus not all fields such as "Account Source" and "D&B Company" are not visible in the form while writing a record, as System Administrator.

The screenshot shows the Salesforce Lightning Experience. A new account record is being created. The 'Rating' field is highlighted with a blue border, indicating it is the current field of focus. Other visible fields include Account Owner (set to Harsha Hargunani), Account Name, Parent Account, Account Number, Account Site, Type, Industry, Annual Revenue, and various lookup fields like Phone, Fax, Website, Ticker Symbol, Ownership, Employees, SIC Code, and Address Information. Buttons at the bottom of the form include 'Cancel', 'Save & New', and 'Save'.

Step4: Create a new Page Layout cloning it from the existing default Account Layout.

The screenshot shows the Salesforce Setup interface under the Object Manager for the 'Account' object. The 'Page Layouts' section is selected. The page displays a list of four existing page layouts: 'Account (Marketing) Layout', 'Account (Sales) Layout', 'Account (Support) Layout', and 'Account Layout'. Each entry shows the creator (Harsha Hargunani) and creation date (19/07/2023, 10:47 am). A red circle highlights the 'New' button in the top right corner of the page layout list. The left sidebar lists other setup categories like 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, and List View Button Layout.

Screenshot of the Salesforce Setup interface showing the creation of a new page layout for the Account object.

Create New Page Layout

Existing Page Layout: Account Layout

Page Layout Name: Full Account Access

Save (button circled in red)

Cancel

Right sidebar:

- Harsha Hargunani (User Profile)
- btscm-dev-ed.develop.my.salesforce.com
- Settings Log Out
- DISPLAY DENSITY: Comfy (selected), Compact
- OPTIONS: Switch to Salesforce Classic, Add Username

Bottom status bar: 29°C Mostly cloudy, Search, Weather icons, ENG IN, 12:20 PM, 09-09-2023

Step5: Drag the all gray highlighted fields from the top “Fields” section to the “Account Information (header visible on edit only)” or whichever section you want that field to appear below.

Screenshot of the Salesforce Setup interface showing the editing of an existing page layout for the Account object.

Fields section (highlighted in gray):

- Section
- Blank Space
- Account Owner
- Annual Revenue
- Customer Priority
- D-U-N-S Number
- Industry
- Number of Locations
- Phone
- Account Site
- Billing Address
- D&B Company
- Einstein Account ...
- Last Modified By
- Operating Hours
- Rating
- Account Name
- Account
- Data.com Key
- Employees
- NAICS Code
- Ownership
- Shipping
- Account Number
- Active
- Description
- Fax
- NAICS Description
- Parent Account
- SIC Code

Account Information (Header visible on edit only) section (highlighted in green):

Account Owner	Sample Text	Rating	Sample Text
* Account Name	Sample Text	Phone	1-415-555-1212
Parent Account	Sample Text	Fax	1-415-555-1212
Account Number	Sample Text	Website	www.Salesforce.com
Account Site	Sample Text	Ticker Symbol	Sample Text
Type	Sample Text	Ownership	Sample Text
Industry	Sample Text	Employees	64,581
Annual Revenue	₹123.45	SIC Code	Sample Text

Custom Buttons: Link a Slack Channel, New Partner Channel

Bottom status bar: 29°C Mostly cloudy, Search, Weather icons, ENG IN, 12:20 PM, 09-09-2023

01:28 - CRM Practical Assignment | Inbox (1,300) - hargunanharsa | Account | Salesforce

btcom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/Account/PageLayouts/00h5j00000HIDMD/view

Setup Home Object Manager View profile

Search Setup

SETUP > OBJECT MANAGER Account

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 List View Button Layout

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields Quick Find Field Name

Section	Account Owner	Annual Revenue	Customer Priority	D-U-N-S Number	Industry	Number of Locations	Phone
Blank Space	Account Site	Billing Address	D&B Company	Einstein Account ...	Last Modified By	Operating Hours	Rating
Account Name	Account Source	Clean Status	Data.com Key	Employees	NAICS Code	Ownership	Shipping
Account Number	Active	Created By	Description	Fax	NAICS Description	Parent Account	SIC Code

Account Information (Header visible on edit only)

Account Owner	Sample Text	Rating	Sample Text
Account Name	Sample Text	Phone	1-415-555-1212
Parent Account	Sample Text	Fax	1-415-555-1212
Account Number	Sample Text	Website	www.Salesforce.com
Account Site	Sample Text	Ticker Symbol	Sample Text
Type	Sample Text	Ownership	Sample Text
Industry	Sample Text	Employees	64,581
Annual Revenue	₹123.45	SIC Code	Sample Text

Address Information (Header visible on edit only)

Billing Address	Suite 300, The Landmark @ One Market San Francisco 94105 CA US	Shipping Address	Suite 300, The Landmark @ One Market San Francisco 94105 CA US
-----------------	-------------------------------------------------------------------------	------------------	-------------------------------------------------------------------------

29°C Mostly cloudy ENG IN 12:21 PM 09-09-2023

01:12 - CRM Practical Assignment | Inbox (1,300) - hargunanharsa | Account | Salesforce

btcom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/Account/PageLayouts/00h5j00000HIDMD/view

Setup Home Object Manager View profile

Search Setup

SETUP > OBJECT MANAGER Account

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 List View Button Layout

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields Quick Find Field Name

Section	Account Owner	Annual Revenue	Customer Priority	D-U-N-S Number	Industry	Number of Locations	Phone
Blank Space	Account Site	Billing Address	D&B Company	Einstein Account ...	Last Modified By	Operating Hours	Rating
Account Name	Account Source	Clean Status	Data.com Key	Employees	NAICS Code	Ownership	Shipping
Account Number	Active	Created By	Description	Fax	NAICS Description	Parent Account	SIC Code

Account Information (Header visible on edit only)

Account Owner	Sample Text	Rating	Sample Text
Account Name	Sample Text	Phone	1-415-555-1212
Account Source	Sample Text	Fax	1-415-555-1212
Parent Account	Sample Text	Website	www.Salesforce.com
Account Number	Sample Text	Ticker Symbol	Sample Text
Account Site	Sample Text	Ownership	Sample Text
Type	Sample Text	Employees	64,581
Industry	Sample Text	SIC Code	Sample Text
Annual Revenue	₹123.45		

Address Information (Header visible on edit only)

Billing Address	Suite 300, The Landmark @ One Market San Francisco 94105 CA	Shipping Address	Suite 300, The Landmark @ One Market San Francisco 94105 CA
-----------------	-------------------------------------------------------------------	------------------	-------------------------------------------------------------------

29°C Mostly cloudy ENG IN 12:21 PM 09-09-2023

Optional - If you don't want all the fields to be editable but only be visible for read only mode. Click on the properties icon in front of that field and check the "read-only" box. Click "Ok".

The screenshot shows the Salesforce Setup interface for the Account object. The 'Page Layouts' tab is active. A context menu is open over the 'NAICS Code' field in the main list, with the 'Read-Only' checkbox checked. The status bar at the bottom shows it's 29°C and mostly cloudy.

The screenshot shows the Salesforce Setup interface for the Account object. The 'Page Layouts' tab is active. A context menu is open over the 'NAICS Code' field in the main list, with the 'Read-Only' checkbox checked. The status bar at the bottom shows it's 29°C and mostly cloudy.

Step6: When all the fields are added in the form, click "save".

15:00 - Time for a break! | Inbox (1,300) - hargunaniharsha | Account | Salesforce

<https://btscom-dev-ed.lightning.force.com/lightning/setup/ObjectManager/Account/PageLayouts/00h5j00000HIDMD/view>

Setup Home Object Manager

SETUP > OBJECT MANAGER Account

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 List View Button Layout

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Field	Field Name
Priority	D-U-N-S Number
Industry	Einstein Account ...
Last Modified By	Operating Hours
Employees	NAICS Code
NAICS Description	Ownership
Fax	NAICS Description
Parent Account	Parent Account
SIC Code	SLA
SLA Serial Number	SLA Description
Upsell Opportunity	SLA Expiration Date
Type	SLA Type
Year Started	TradeStyle
Website	Website

Account Information (Header visible on edit only)

Account Owner	Sample Text	NAICS Code	Sample Text
Account Name	Sample Text	NAICS Description	Sample Text
Account Source	Sample Text	Rating	Sample Text
Parent Account	Sample Text	Phone	1-415-555-1212
Account Number	Sample Text	Fax	1-415-555-1212
Account Site	Sample Text	Website	www.Salesforce.com
Type	Sample Text	Ticker Symbol	Sample Text
Industry	Sample Text	Operating Hours	Sample Text
Annual Revenue	₹123.45	Ownership	Sample Text
D&B Company	Sample Text	Employees	64,581
Data.com Key	Sample Text	SIC Code	Sample Text
D-U-N-S Number	Sample Text	SIC Description	Sample Text
Einstein Account Tier	Sample Text	TradeStyle	Sample Text
		Year Started	Sample Text

29°C Mostly cloudy Search ENG IN 12:24 PM 09-09-2023

Step7: Now assign this "Full Account Access" layout to the system Admin profile.

15:00 - Time for a break! | Inbox (1,300) - hargunaniharsha | Recently Viewed | Accounts | Sales | Account | Salesforce

<https://btscom-dev-ed.lightning.force.com/lightning/setup/ObjectManager/Account/PageLayouts/view>

Setup Home Object Manager

SETUP > OBJECT MANAGER Account

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 List View Button Layout

Page Layouts 5 Items, Sorted by Page Layout Name

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Account (Marketing) Layout	Harsha Hargunani, 19/07/2023, 10:47 am	Harsha Hargunani, 19/07/2023, 10:47 am
Account (Sales) Layout	Harsha Hargunani, 19/07/2023, 10:47 am	Harsha Hargunani, 19/07/2023, 10:47 am
Account (Support) Layout	Harsha Hargunani, 19/07/2023, 10:47 am	Harsha Hargunani, 19/07/2023, 10:47 am
Account Layout	Harsha Hargunani, 19/07/2023, 10:47 am	Harsha Hargunani, 19/07/2023, 10:47 am
Full Account Access	Harsha Hargunani, 09/09/2023, 12:20 pm	Harsha Hargunani, 09/09/2023, 12:24 pm

Quick Find New Page Layout Assignment

29°C Mostly cloudy Search ENG IN 12:26 PM 09-09-2023

15:00 - Time for a break! | Inbox (1,300) - hargunaniharsha | Account | Salesforce | Recently Viewed | Accounts | Sale | +

btcom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/Account/PageLayouts/viewPageAssignments

Setup Home Object Manager

Search Setup

Help for this Page ?

SETUP > OBJECT MANAGER Account

Page Layout Assignment Account

The table below shows the page layout assignments for different profiles.

Profiles	Page Layout
Agent	Account Layout
Analytics Cloud Integration User	Account Layout
Analytics Cloud Security User	Account Layout
Authenticated Website	Account Layout
Authenticated Website	Account Layout
Chatter External User	Account Layout
Chatter Free User	Account Layout
Chatter Moderator User	Account Layout
Contract Manager	Account Layout
Cross Org Data Proxy User	Account Layout
Custom: Marketing Profile	Account (Marketing) Layout
Custom: Sales Profile	Account (Sales) Layout
Custom: Support Profile	Account (Support) Layout
Customer Care	Account Layout
Customer Community Login User	Account Layout
Customer Community Plus Login User	Account Layout
Customer Community Plus User	Account Layout

Edit Assignment

29°C Mostly cloudy

Search

ENG IN 12:27 PM 09-09-2023

15:00 - Time for a break! | Inbox (1,300) - hargunaniharsha | Account | Salesforce | Recently Viewed | Accounts | Sale | +

btcom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/Account/PageLayouts/viewPageAssignments

Setup Home Object Manager

Search Setup

Help for this Page ?

SETUP > OBJECT MANAGER Account

Page Layout Assignment Account

Page Layout To Use: Account Layout 1 Selected 1 Changed

Profiles

Profiles	Page Layout
CUSTOMER COMMUNITY PLUS USER	Account Layout
CUSTOMER COMMUNITY USER	-- Select Page Layout --
CUSTOMER PORTAL MANAGER CUSTOM	Account (Marketing) Layout
CUSTOMER PORTAL MANAGER STANDARD	Account (Sales) Layout
EXTERNAL APPS LOGIN USER	Account (Support) Layout
EXTERNAL IDENTITY USER	Account Layout
FORCE.COM - APP SUBSCRIPTION USER	Account Layout
FORCE.COM - FREE USER	Account Layout
Gold Partner User	Account Layout
High Volume Customer Portal	Account Layout
High Volume Customer Portal User	Account Layout
Identity User	Account Layout
Marketing User	Account Layout
MINIMUM ACCESS - SALESFORCE	Not Assigned
Partner App Subscription User	Account Layout
Partner Community Login User	Account Layout
Partner Community User	Account Layout
Read Only	Account Layout
Regional Manager	Account Layout
Salesforce API Only System Integrations	Account Layout
Silver Partner User	Account Layout
Solution Manager	Account Layout
Standard Platform User	Account Layout
Standard User	Account Layout
System Administrator	Account Layout
Work.com Only User	Account Layout

Harsha Hargunani
btcom-dev-ed.develop.my.salesforce.com
Settings Log Out

DISPLAY DENSITY

✓ Comfy Compact

OPTIONS

Switch to Salesforce Classic ⓘ Add Username

29°C Mostly cloudy

Search

ENG IN 12:27 PM 09-09-2023

15:00 - Time for a break! | Inbox (1,300) - hargunaniharsha | Account | Salesforce | Recently Viewed | Accounts | Sale | +

<https://btscom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/Account/PageLayouts/viewPageAssignments>

Profiles	Page Layout
CUSTOMER COMMUNITY PLUS USER	Account Layout
CUSTOMER COMMUNITY USER	Account Layout
CUSTOMER PORTAL MANAGER CUSTOM	Account Layout
CUSTOMER PORTAL MANAGER STANDARD	Account Layout
EXTERNAL APPS LOGIN USER	Account Layout
EXTERNAL IDENTITY USER	Account Layout
FORCE.COM - APP SUBSCRIPTION USER	Account Layout
FORCE.COM - FREE USER	Account Layout
Gold Partner User	Account Layout
High Volume Customer Portal	Account Layout
High Volume Customer Portal User	Account Layout
Identity User	Account Layout
Marketing User	Account Layout
MINIMUM ACCESS - SALESFORCE	Not Assigned
PARTNER APP SUBSCRIPTION USER	Account Layout
PARTNER COMMUNITY LOGIN USER	Account Layout
PARTNER COMMUNITY USER	Account Layout
Read Only	Account Layout
Regional Manager	Account Layout
Salesforce API Only System Integrations	Account Layout
Silver Partner User	Account Layout
Solution Manager	Account Layout
Standard Platform User	Account Layout
Standard User	Account Layout
System Administrator	Full Account Access
Work.com Only User	Account Layout

Setup Home Object Manager Account

DISPLAY DENSITY

- ✓ Comfy
- Compact

OPTIONS

- Switch to Salesforce Classic
- Add Username

29°C Mostly cloudy ENG IN 12:28 PM 09-09-2023

Click "Save".

Step8: Open the Account form through any user having a System Administrator profile. You will observe that all the fields that weren't showing up in the form previously, are now visible as well as editable.

21:22 - CRM Practical Assignment | Inbox (1,300) - hargunaniharsha | New Account | Salesforce | +

https://btscom-dev-ed.develop.lightning.force.com/lightning/o/Account/new?count=1&nooverride=1&useRecordTypeCheck=1&navigationLocation=LIST_VIEW&uid=169424290865572504&backgr...

Service Home Chatter Accounts

Recently Viewed

0 items • Updated a few seconds ago

Account Name

Account Owner: Harsha Hargunani

NAICS Code:

NAICS Description:

Account Name:

Account Source: --None--

Rating: --None--

Parent Account: Search Accounts...

Phone:

Account Number:

Fax:

Account Site:

Website:

Type: --None--

Ticker Symbol:

Industry: --None--

Operating Hours:

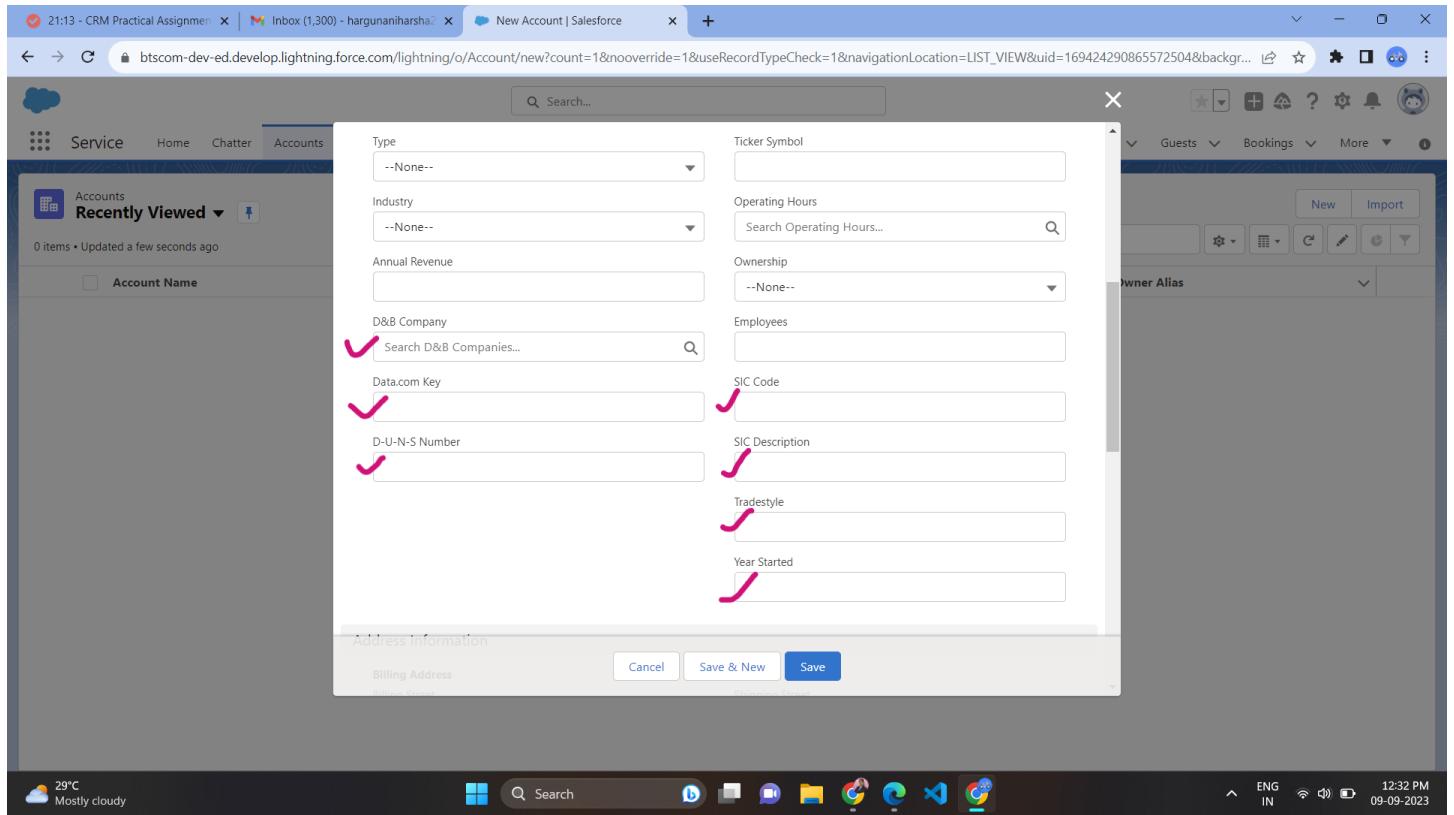
Annual Revenue:

D&B Company:

Cancel Save & New Save

Guests Bookings More

29°C Mostly cloudy ENG IN 12:31 PM 09-09-2023



Q5. Customer Care should NOT be able to see SIC Code, SLA and SLA expiration Date and Ticket Symbol fields.

Ans. Step1: Create a new clone page layout from the default Account Layout.

Screenshot of the Salesforce Setup interface showing the creation of a new page layout for the Account object.

The left sidebar shows the navigation path: SETUP > OBJECT MANAGER > Account > Page Layouts.

The main area displays the "Create New Page Layout" screen. It includes a note about cloning existing layouts, a dropdown for "Existing Page Layout" set to "Account Layout", and a text input for "Page Layout Name" containing "Customer Care Layout".

The right sidebar shows user information (Harsha Hargunani) and settings for "DISPLAY DENSITY" (set to "Comfy"), "OPTIONS", and links to "Switch to Salesforce Classic" and "Add Username".

The system status bar at the bottom indicates "05:00 - Time for a break!", "Inbox (1,300) - hargunaniharsha", "Recently Viewed | Accounts | Sale", "Account | Salesforce", and the date "09-09-2023".

Step2: Click on remove icon in front of the fields that you don't want to be visible.

Screenshot of the Salesforce Setup interface showing the editing of an existing page layout for the Account object.

The left sidebar shows the navigation path: SETUP > OBJECT MANAGER > Account > Page Layouts.

The main area displays the "Edit Page Layout" screen for the "Customer Care Layout". The "Fields" section lists various account fields: Account Owner, Annual Revenue, Customer Priority, D-U-N-S Number, Industry, Account Site, Billing Address, D&B Company, Einstein Account ..., Last Modified By, Account Name, Account Source, Clean Status, Data.com Key, Employees, NAICS Code, Account Number, Active, Created By, Description, Fax, NAICS Description.

A red circle highlights the "Remove" icon (a minus sign) located next to the "SIC Code" field in the list.

The right sidebar shows user information (Harsha Hargunani) and settings for "DISPLAY DENSITY" (set to "Comfy"), "OPTIONS", and links to "Switch to Salesforce Classic" and "Add Username".

The system status bar at the bottom indicates "05:00 - Time for a break!", "Inbox (1,300) - hargunaniharsha", "Recently Viewed | Accounts | Sale", "Account | Salesforce", and the date "09-09-2023".

05:00 - Time for a break! | Inbox (1,300) - hargunaniharsha | Recently Viewed | Accounts | Sales | Account | Salesforce

btcom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/Account/PageLayouts/00h5j00000HIDNk/view

Cloud Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER Account

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 List View Button Layout Hierarchy Columns Scoping Rules

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields Quick Find: Field Name

Section	Account Owner	Annual Revenue	Customer Priority	D-U-N-S Number	Industry
Blank Space	Account Site	Billing Address	D&B Company	Einstein Account ...	Last Modified By
Account Name	Account Source	Clean Status	Data.com Key	Employees	NAICS Code
Account Number	Active	Created By	Description	Fax	NAICS Description

Address Information (Header visible on edit only)

Billing Address	Suite 300, The Landmark @ One Market San Francisco 94105 CA US	Shipping Address	Suite 300, The Landmark @ One Market San Francisco 94105 CA US
-----------------	-------------------------------------------------------------------------	------------------	-------------------------------------------------------------------------

Additional Information (Header visible on edit only)

Customer Priority	Sample Text	SLA	Sample Text
SLA Expiration Date	09/09/2023	SLA Serial Number	Sample Text
Number of Locations	727	Upsell Opportunity	Sample Text
Active	Sample Text	Remove	

System Information (Header visible on edit only)

Created By	Sample Text	Last Modified By	Sample Text
------------	-------------	------------------	-------------

Description Information (Header visible on edit only)

Description	Sample Text
-------------	-------------

Custom Links (Header not visible)

Billing	
---------	--

26°C Cloudy ENG IN 01:33 PM 09-09-2023

Harsha Hargunani btcom-dev-ed.develop.my.salesforce.com Settings Log Out

DISPLAY DENSITY ✓ Comfy Compact OPTIONS Switch to Salesforce Classic Add Username

05:00 - Time for a break! | Inbox (1,300) - hargunaniharsha | Recently Viewed | Accounts | Sales | Account | Salesforce

btcom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/Account/PageLayouts/00h5j00000HIDNk/view

Cloud Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER Account

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 List View Button Layout Hierarchy Columns Scoping Rules

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields Quick Find: Field Name

Section	Account Owner	Annual Revenue	Customer Priority	D-U-N-S Number	Industry
Blank Space	Account Site	Billing Address	D&B Company	Einstein Account ...	Last Modified By
Account Name	Account Source	Clean Status	Data.com Key	Employees	NAICS Code
Account Number	Active	Created By	Description	Fax	NAICS Description

Get Survey Invitation Check for New Data View Partner Scorecard Add to Call List Printable View Link a Slack Channel New Partner Channel

Custom Buttons

Account Information (Header visible on edit only)

Account Owner	Sample Text	Rating	Sample Text
* Account Name	Sample Text	Phone	1-415-555-1212
Parent Account	Sample Text	Fax	1-415-555-1212
Account Number	Sample Text	Website	www.salesforce.com
Account Site	Sample Text	Ticker Symbol	Sample Text
Type	Sample Text	Ownership	Sample Text
Industry	Sample Text	Employees	57,601
Annual Revenue	₹123.45	Remove	

Address Information (Header visible on edit only)

Billing Address	Suite 300, The Landmark @ One Market San Francisco 94105 CA US	Shipping Address	Suite 300, The Landmark @ One Market San Francisco 94105 CA US
-----------------	-------------------------------------------------------------------------	------------------	-------------------------------------------------------------------------

26°C Cloudy ENG IN 01:33 PM 09-09-2023

Harsha Hargunani btcom-dev-ed.develop.my.salesforce.com Settings Log Out

DISPLAY DENSITY ✓ Comfy Compact OPTIONS Switch to Salesforce Classic Add Username

Step3: After verifying that the fields are now highlighted gray, click on "Save".

The screenshot shows the Salesforce Object Manager interface for the Account object. The 'Page Layouts' tab is selected in the sidebar. The main area displays the current page layout for the Account object. At the top, there's a toolbar with buttons for Save, Quick Save, Preview As..., Cancel, Undo, Redo, and Layout Properties. A red circle highlights the 'Save' button. Below the toolbar, a 'Fields' section lists various fields like Buttons, Custom Links, Quick Actions, Mobile & Lightning Actions, Expanded Lookups, and Related Lists. The main layout area contains sections for 'Account Information' and 'Address Information'. Fields in these sections are highlighted in gray, indicating they have been modified. The bottom right corner of the screen shows the system status bar with weather information (26°C, Cloudy), language (ENG IN), and date/time (01:34 PM 09-09-2023).

Step4: Assign this "Customer Care Layout" to the customer care profile from Edit Page Layout Assignment.

The screenshot shows the 'Edit Page Layout Assignment' screen for the Account object. The 'Page Layouts' tab is selected in the sidebar. The main area shows the 'Page Layout To Use' dropdown, which is currently set to 'Customer Care Layout'. A dropdown menu is open, showing a list of available page layouts for the Account object. The 'Customer Care Layout' is highlighted. A context menu is open on the right side of the screen, showing options like 'Comfy', 'Compact', 'Switch to Salesforce Classic', and 'Add Username'. The user's profile information is visible in the top right corner. The bottom right corner of the screen shows the system status bar with weather information (NH75F / Pune... Closed road), language (ENG IN), and date/time (01:34 PM 09-09-2023).

Step5: Login as Bunty Mode - customer care profile user to see changes.

Before -

The screenshot shows the 'Account Information' section of the Salesforce Account creation page. The 'Account Owner' field is populated with 'Bunty Modi', which is circled in red. Other fields include 'Rating' (set to '--None--'), 'Phone', 'Fax', 'Website', 'Ticker Symbol', 'Type' (set to '--None--'), 'Ownership' (set to '--None--'), 'Industry' (set to '--None--'), 'Employees', 'Annual Revenue', and 'SIC Code'. The bottom of the form has 'Address Information' tabs and buttons for 'Cancel', 'Save & New', and 'Save'.

The screenshot shows the 'Additional Information' section of the Salesforce Account creation page. Several fields have been modified: 'Customer Priority' is now set to 'SLA' (marked with a red checkmark), 'SLA Expiration Date' is marked with a red checkmark, 'Number of Locations' is empty, 'SLA Serial Number' is empty, 'Upsell Opportunity' is set to '--None--', and 'Active' is set to '--None--'. The bottom of the form has 'Description Information' tabs and buttons for 'Cancel', 'Save & New', and 'Save'.

After-

New Account | Salesforce

btscm-dev-ed.develop.lightning.force.com/lightning/o/Account/new?count=1&nooverride=1&useRecordTypeCheck=1&navigationLocation=LIST_VIEW&uid=169424743119297639&...

Service Home Chatter Accounts

Recently Viewed ▾

0 items • Updated a few seconds ago

Account Name

Account Information

Account Owner: Bunty Modi (circled)

Rating: --None--

Phone:

Fax:

Website:

Account Number:

Account Site:

Ownership: --None--

Type: --None--

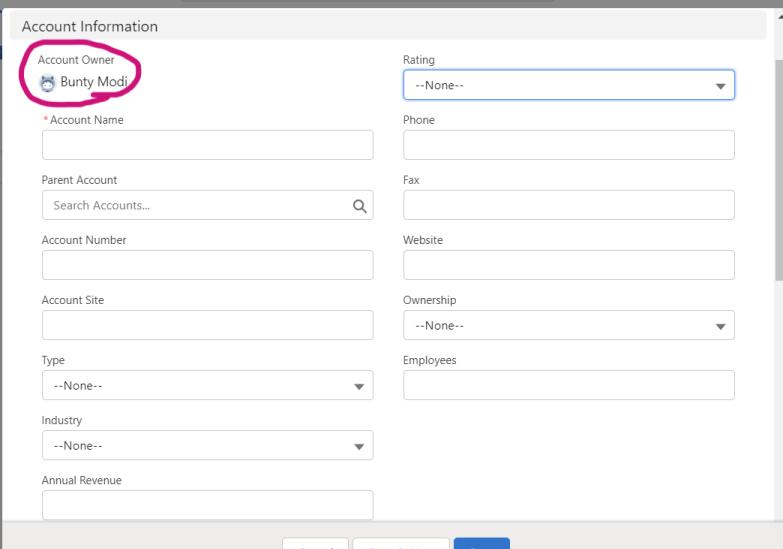
Employees:

Industry: --None--

Annual Revenue:

Address Information

Cancel Save & New Save



New Account | Salesforce

btscm-dev-ed.develop.lightning.force.com/lightning/o/Account/new?count=1&nooverride=1&useRecordTypeCheck=1&navigationLocation=LIST_VIEW&uid=169424743119297639&...

Service Home Chatter Accounts

Recently Viewed ▾

0 items • Updated a few seconds ago

Account Name

Billing Zip/Postal Code:

Billing State/Province:

Shipping Zip/Postal Code:

Shipping State/Province:

Billing Country:

Shipping Country:

Additional Information

Customer Priority: --None--

SLA Serial Number:

Number of Locations:

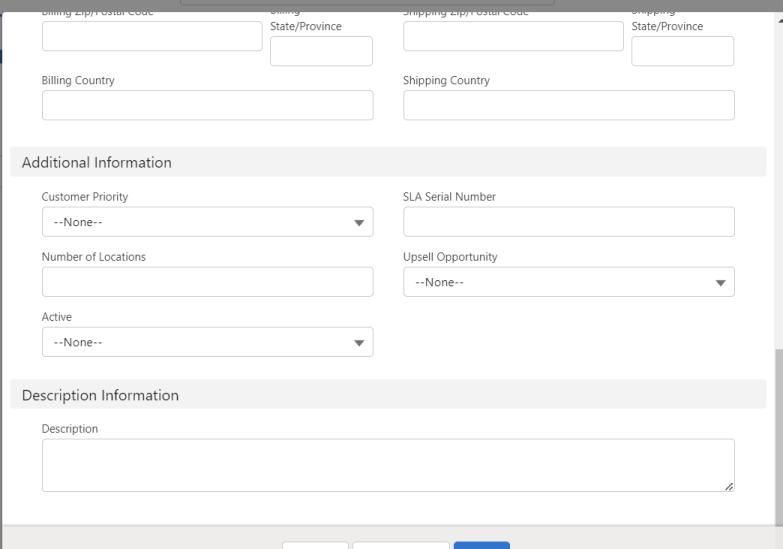
Upsell Opportunity: --None--

Active: --None--

Description Information

Description:

Cancel Save & New Save



Q6. Agents should NOT be able to see Rating and Customer Priority Fields.

Ans. Step1: Create a new clone page layout from the default Account Layout.

The screenshot shows the Salesforce Setup interface for the Account object. On the left, a sidebar lists various configuration options under 'Page Layouts'. The main area displays a table of existing page layouts for the Account object, sorted by name. The columns are 'PAGE LAYOUT NAME', 'CREATED BY', and 'MODIFIED BY'. A red circle highlights the 'New' button at the top right of the table header. The table contains the following data:

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Account (Marketing) Layout	Harsha Hargunani, 19/07/2023, 10:47 am	Harsha Hargunani, 19/07/2023, 10:47 am
Account (Sales) Layout	Harsha Hargunani, 19/07/2023, 10:47 am	Harsha Hargunani, 19/07/2023, 10:47 am
Account (Support) Layout	Harsha Hargunani, 19/07/2023, 10:47 am	Harsha Hargunani, 19/07/2023, 10:47 am
Account Layout	Harsha Hargunani, 19/07/2023, 10:47 am	Harsha Hargunani, 19/07/2023, 10:47 am
Customer Care Layout	Harsha Hargunani, 09/09/2023, 1:32 pm	Harsha Hargunani, 09/09/2023, 1:45 pm
Full Account Access	Harsha Hargunani, 09/09/2023, 12:20 pm	Harsha Hargunani, 09/09/2023, 12:43 pm

The screenshot shows the 'Create New Page Layout' dialog for the Account object. The sidebar on the left is identical to the previous screenshot. The main area has a title 'Create New Page Layout' and a note: 'As an option, you may select an existing layout to clone. If you create a page layout without cloning, your page layout will not include the standard sections whose names start with "standard_".'. It includes fields for 'Existing Page Layout' (set to 'Account Layout') and 'Page Layout Name' (set to 'Agent Layout'). A checkbox for 'Feed-Based Layout' is unchecked. On the right, there is a user profile sidebar for 'Harsha Hargunani' and a 'DISPLAY DENSITY' section with 'Comfy' selected. At the bottom are 'Save' and 'Cancel' buttons.

Step2: Click on remove icon in front of the fields that you don't want to be visible, "Rating" and "Customer Priority"

The screenshot shows the Salesforce Setup interface for the Account object. The left sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, and Lightning Record Pages. The 'Page Layouts' tab is currently selected. In the main area, there's a 'Fields' section where several fields are listed: Account Owner, Annual Revenue, Customer Priority, D-U-N-S Number, Industry, Account Site, Billing Address, D&B Company, Einstein Account ..., Last Modified By, Account Name, Account Source, Clean Status, Data.com Key, Employees, NAICS Code, Account Number, Active, Created By, Description, Fax, and NAICS Description. The 'Customer Priority' field has a red 'Remove' button next to it. Below the fields, there are sections for Address Information, Additional Information, System Information, and Description Information. The right sidebar shows the user's profile (Harsha Hargunani), display density settings (set to 'Comfy'), and options to switch to Salesforce Classic or add a username. The bottom of the screen shows the Windows taskbar with various icons and system status.

Step3: After verifying that the fields are now highlighted gray, click on "Save".

Step4: Assign "Agent Layout" to Agent profile.

The screenshot shows the Salesforce Setup interface for the Account object. The left sidebar lists various configuration categories like 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, List View Button Layout, Hierarchy Columns, and Scoping Rules. The 'Page Layouts' section is currently selected. The main content area displays the 'Edit Page Layout Assignment' screen for the 'Account' object. It shows a table where profiles are mapped to specific page layouts. A dropdown menu 'Page Layout To Use:' is open over the 'Agent' profile, showing options such as 'Agent Layout', 'Customer Care Layout', 'Full Account Access', and 'Account Layout'. The right side of the screen features a user profile for 'Harsha Hargunani' and a 'DISPLAY DENSITY' dropdown set to 'Comfy'. A status bar at the bottom shows the date and time.

The screenshot shows the Salesforce Page Layout Assignment page for the Account object. The left sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, etc. The main content area is titled "Page Layout Assignment" under "Account". It displays a table of assignments for different profiles. The columns are "Profiles" and "Page Layout". A red box highlights the "Agent" profile in the first column, and another red box highlights the "Agent Layout" in the second column. The table rows list various user profiles and their corresponding page layouts.

Profiles	Page Layout
Agent	Agent Layout
Analytics Cloud Integration User	Account Layout
Analytics Cloud Security User	Account Layout
Authenticated Website	Account Layout
Authenticated Website	Account Layout
Chatter External User	Account Layout
Chatter Free User	Account Layout
Chatter Moderator User	Account Layout
Contract Manager	Account Layout
Cross Org Data Proxy User	Account Layout
Custom: Marketing Profile	Account (Marketing) Layout
Custom: Sales Profile	Account (Sales) Layout
Custom: Support Profile	Account (Support) Layout
Customer Care	Customer Care Layout
Customer Community Login User	Account Layout
Customer Community Plus Login User	Account Layout
Customer Community Plus User	Account Layout
Customer Community User	Account Layout
Customer Portal Manager Custom	Account Layout
Customer Portal Manager Standard	Account Layout
External Apex Login User	Account Layout

Step5: Login as Hari Modi or Krishna Modi (agent profile users) to note the changes in the form. To log in as any user, make sure that the user is marked as 'active'.

Before-

New Account | Salesforce

btscm-dev-ed.develop.lightning.force.com/lightning/o/Account/new?count=1&nooverride=1&useRecordTypeCheck=1&navigationLocation=LIST_VIEW&uid=169424872858533254&...

Incognito

Cloud Service Home Chatter Accounts

Recently Viewed ▾

0 items • Updated a few seconds ago

Account Name

Account Information

Account Owner: Krishna Modi

Rating: --None-- ✓

* Account Name:

Phone:

Parent Account: Search Accounts...

Fax:

Account Number:

Website:

Account Site:

Ticker Symbol:

Type: --None--

Ownership: --None--

Industry: --None--

Employees:

Annual Revenue:

SIC Code:

Address information

Cancel Save & New Save

USD/INR -0.18% 02:08 PM 09-09-2023

New Account | Salesforce

btscm-dev-ed.develop.lightning.force.com/lightning/o/Account/new?count=1&nooverride=1&useRecordTypeCheck=1&navigationLocation=LIST_VIEW&uid=169424872858533254&...

Incognito

Cloud Service Home Chatter Accounts

Recently Viewed ▾

0 items • Updated a few seconds ago

Account Name

Billing Country:

Shipping Country:

Additional Information

Customer Priority: --None-- ✓

SLA: --None--

SLA Expiration Date:

SLA Serial Number:

Number of Locations:

Upsell Opportunity: --None--

Active: --None--

Description Information

Description:

Cancel Save & New Save

USD/INR -0.18% 02:09 PM 09-09-2023

After-

New Account | Salesforce

btscm-dev-ed.develop.lightning.force.com/lightning/o/Account/new?count=1&nooverride=1&useRecordTypeCheck=1&navigationLocation=LIST_VIEW&uid=169424915037698478&...

Service Home Chatter Accounts

Recently Viewed ▾

0 items • Updated a few seconds ago

Account Name

Account Information

Account Owner	Phone
Krishna Modi	
* Account Name	Fax
<input type="text"/>	
Parent Account	Website
<input type="text"/> Search Accounts...	
Account Number	Ticker Symbol
<input type="text"/>	
Account Site	Ownership
<input type="text"/>	--None--
Type	Employees
--None--	<input type="text"/>
Industry	SIC Code
--None--	<input type="text"/>
Annual Revenue	
<input type="text"/>	

Address Information

Cancel Save & New Save

29°C Mostly cloudy

Search

02:16 PM 09-09-2023

New Account | Salesforce

btscm-dev-ed.develop.lightning.force.com/lightning/o/Account/new?count=1&nooverride=1&useRecordTypeCheck=1&navigationLocation=LIST_VIEW&uid=169424915037698478&...

Service Home Chatter Accounts

Recently Viewed ▾

0 items • Updated a few seconds ago

Account Name

Billing Zip/Postal Code State/Province Shipping Zip/Postal Code Shipping State/Province

Billing Country Shipping Country

Additional Information

SLA Expiration Date	SLA
<input type="text"/>	--None--
Number of Locations	SLA Serial Number
<input type="text"/>	<input type="text"/>
Active	Upsell Opportunity
--None--	--None--

Description Information

Description

Cancel Save & New Save

29°C Mostly cloudy

Search

02:16 PM 09-09-2023