

**Naan Mudhalvan
Salesforce Developer (Course)
Assignment**

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Year and Dept: 4th year and CSE
Batch: 2024
Zone.no: Zone 8

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

Solution:

Step 1: Create Custom Object

The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. A message at the top indicates that permissions for the new object are disabled by default and provides links to enable them or edit profiles. The 'Custom Object Definition Edit' page is displayed, showing the configuration for the 'college' object. The 'Label' field is set to 'college' and the 'Plural Label' field is set to 'colleges'. The 'Description' field is empty. Under 'Context-Sensitive Help Setting', the option 'Open the standard Salesforce.com Help & Training window' is selected. The 'Content Name' dropdown is set to '-None-'.

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 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

Object Manager | Salesforce

d5g00000khbjleaz-dev-ed.lightning.force.com/lightning/setup/ObjectManager/page?address=%2F01l%2Fe%3FretURL%3D%2Fsetup%2Fobject%2Fmanager

Setup Home Object Manager

SETUP Object Manager

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

Windows Search Google WhatsApp

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Step 2: Create a Master-Detail Relationship

The screenshot shows the Salesforce Setup interface for creating a new custom field. The object being modified is 'department'. The current step is 'Step 1. Choose the field type'. The 'Data Type' section is displayed, with the 'Master-Detail Relationship' option selected. This option is described as creating a special parent-child relationship where the relationship field is required on all detail records, ownership is determined by the master record, and detail records are deleted when the master record is deleted. A note also mentions that rollup summary fields can be created on the master record to summarize detail records.

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 1. Choose the field type Step 1

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

Next Cancel Help for this Page

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Setup | department | Salesforce

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Search Setup

Cloud icon

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 Relationship

Help for this Page ?

Step 2 of 6

Step 2. Choose the related object

Select the other object to which this object is related.

Related To college

Previous Next Cancel

Windows icon Search icon Google icon WhatsApp icon

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Setup | department | Salesforce

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Search Setup

Cloud icon

Setup Home Object Manager

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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 Relationship

Help for this Page

Step 3 of 6 Previous Next Cancel

Field Label: college

Field Name: college

Description:

Help Text:

Child Relationship Name: departments

Sharing Setting: Select the minimum access level required on the Master record to create, edit, or delete related Detail records:
 Read Only: Allows users with at least Read access to the Master record to create, edit, or delete related Detail records.
 Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.

Allow reparenting: Child records can be reparented to other parent records after they are created

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

Windows icon Search icon Google icon WhatsApp icon

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department | Salesforce

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Setup Home Object Manager

SETUP > OBJECT MANAGER department

Details

Fields & Relationships

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Flow Triggers

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

These are the field-level settings for a Master-Detail relationship. They cannot be changed.

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Authenticated Website	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Authenticated Website	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Customer Community Login User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Customer Community Plus Login User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Customer Community Plus User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Customer Community User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Customer Portal Manager Custom	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Customer Portal Manager Standard	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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department | Salesforce

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Setup Home Object Manager

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Triggers

Flow Triggers

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

These are the field-level settings for a Master-Detail relationship. They cannot be changed.

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Authenticated Website	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Authenticated Website	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Customer Community Login User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Customer Community Plus Login User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Customer Community Plus User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Customer Community User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Customer Portal Manager Custom	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Customer Portal Manager Standard	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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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 Relationship

Help for this Page ?

Step 5 of 6

Step 5. Add reference field to Page Layouts

Field Label college
Data Type Master-Detail
Field Name college
Description

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

Add Field Page Layout Name

department Layout

Previous Next Cancel

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department New Relationship

Help for this Page ?

Step 6. Add custom related lists Step 6 of 6

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 departments

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

Previous Save & New Save Cancel

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department | Salesforce

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Setup Home Object Manager

SETUP > OBJECT MANAGER department

Details Fields & Relationships

4 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
college	college_c	Master-Detail(college)		✓
Created By	CreatedById	Lookup(User)		▼
DE Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		▼

Page Layouts
Lightning Record Pages
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Quick Find New Deleted Fields Field Dependencies Set History Tracking

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Search Setup



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Details

Description

API Name

CDepartment_c

Custom



Singular Label

CDepartment

Plural Label

CDepartments

Enable Reports

Track Activities

Track Field History

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

Edit Delete



Search Setup



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CDepartment
New Relationship

Help for this Page

Step 3 of 6

[Previous](#) [Next](#) [Cancel](#)Field Label Field Name Description Help Text Child Relationship Name Sharing Setting
 Read Only: Allows users with at least Read access to the Master record to create, edit, or delete related Detail records.
 Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.Allow reparenting Child records can be reparented to other parent records after they are createdAuto add to custom report type Add this field to existing custom report types that contain this entity

Lookup Filter



Search Setup



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Validation Rules

CDepartment
New Relationship

Help for this Page

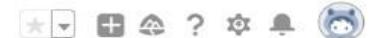
Step 2. Choose the related object**Step 2 of 6**[Previous](#) [Next](#) [Cancel](#)

Select the other object to which this object is related.

Related To [Previous](#) [Next](#) [Cancel](#)



Search Setup



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Validation Rules

CDepartment
New Custom Field

Help for this Page

Step 1

Next

Cancel

Step 1. Choose the field type

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 RelationshipCreates 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.

 Other...

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

Step 3: Create the Roll-Up Summary Field

The screenshot shows the Salesforce Setup interface for creating a new custom field. The page title is "college | Salesforce" and the URL is "d5g00000khbjleaz-dev-ed.lightning.force.com/lightning/setup/ObjectManager/0I15g000004TGso/FieldsAndRelationships/new". The top navigation bar includes "Setup", "Home", and "Object Manager". The left sidebar lists various setup categories: Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, Scoping Rules, Triggers, and Flow Triggers. The main content area is titled "New Custom Field" and "Step 1. Choose the field type". It asks to "Specify the type of information that the custom field will contain." Under "Data Type", the "Roll-Up Summary" option is selected, indicated by a blue circle. Other options shown are "None Selected", "Auto Number", "Formula", "Lookup Relationship", and "Master-Detail Relationship". The "Roll-Up Summary" description states: "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." The "Next" button is visible at the top right of the step panel.

college | Salesforce

d5g00000khbjleaz-dev-ed.lightning.force.com/lightning/setup/ObjectManager/0I15g000004TGso/FieldsAndRelationships/new

Setup Home Object Manager

SETUP > OBJECT MANAGER college

Details

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Triggers

Flow Triggers

college New Custom Field

Step 1. Choose the field type Step 1

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

Help for this Page ?

Next Cancel

ENG IN 04:23 PM 03-10-2023

college | Salesforce

d5g00000khbjleaz-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I5g000004TGso/FieldsAndRelationships/new

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 Restriction Rules Scoping Rules Triggers Flow Triggers

college New Custom Field

Step 2. Enter the details Step 2 of 5

Field Label: total count

Field Name: total_count

Description:

Help Text:

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

Previous Next Cancel

Windows Search Task View Google Chrome WhatsApp ENG IN 04:23 PM 03-10-2023

college | Salesforce

d5g00000khbjleaz-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01I5g000004TGso/FieldsAndRelationships/new

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 Restriction Rules Scoping Rules Triggers Flow Triggers

college New Custom Field

Help for this Page ?

Step 3. Define the summary calculation Step 3 of 5

Previous Next Cancel

Select Object to Summarize

Master Object: college
Summarized Object: departments

Required Information

Select Roll-Up Type

COUNT (radio button selected)
SUM
MIN
MAX

Field to Aggregate: None

Filter Criteria

All records should be included in the calculation (radio button selected)
Only records meeting certain criteria should be included in the calculation

Previous Next Cancel

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S | T college | Salesforce X + d5g00000khbjleaz-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I5g000004TGso/FieldsAndRelationships/new

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER college

New Custom Field

Step 4. Establish field-level security Step 4 of 5

Previous Next Cancel

Field Label: total count
Data Type: Roll-Up Summary
Field Name: total_count
Description:

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Force.com - App Subscription User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Force.com - Free User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

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college | Salesforce

d5g00000khbjleaz-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I5g000004TGso/FieldsAndRelationships/new

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 Restriction Rules Scoping Rules Triggers Flow Triggers

college New Custom Field

Help for this Page ?

Step 5. Add to page layouts Step 5 of 5

Field Label: total count
Data Type: Roll-Up Summary
Field Name: total_count
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
 college Layout

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

Previous Save & New Save Cancel

04:24 PM 03-10-2023 ENG IN

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

- Header:** Tabs | Salesforce
- Search Bar:** Search Setup
- Setup Tab:** Selected
- Object Manager:** Home
- Search Box:** tabs
- Left Sidebar:** User Interface - Rename Tabs and Labels, Tabs (selected)
- Main Content:**
 - Section:** Step 1. Enter the Details (Step 1 of 3)
 - Description:** Choose the custom object for this new custom tab. Fill in other details.
 - Object Selection:** Select an existing custom object or [create a new custom object now](#).
 - Object: college (selected)
 - Tab Style: Jewel (selected)
 - Optional Link:** (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--
 - Description:** Enter a short description.
 - Description: [Empty Text Area]
- Buttons:** Next, Cancel

S | T Tabs | Salesforce X

d5g00000khbjleaz-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2FobjectCustomTabWizard.jsp%3FretURL%3D%252Fsetup%252Fui%252F...

Cloud Search Setup Home Object Manager

Setup

tabs

User Interface

Rename Tabs and Labels

Tabs

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

SETUP Tabs

New Custom Object Tab

Help for this Page ? Step 2 of 3

Step 2. Add to Profiles

Choose the user profiles for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each profile.

Apply one tab visibility to all profiles Default On Apply a different tab visibility for each profile

Profile	Tab Visibility
Analytics Cloud Integration User	Default On
Analytics Cloud Security User	Default On
Authenticated Website	Default On
Authenticated Website	Default On
Contract Manager	Default On
Cross Org Data Proxy User	Default On
Custom: Marketing Profile	Default On
Custom: Sales Profile	Default On
Custom: Support Profile	Default On
Customer Community Login User	Default On
Customer Community Plus Login User	Default On

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S | T Tabs | Salesforce X

d5g00000khbjleaz-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2FobjectCustomTabWizard.jsp%3FretURL%3D%252Fsetup%252Fui%252F...

Cloud Search Setup

Setup Home Object Manager

tabs

User Interface

Rename Tabs and Labels

Tabs

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

SETUP Tabs

Step 3. Add to Custom Apps Step 3 of 3

Choose the custom apps for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each Custom App.

Custom App	<input checked="" type="checkbox"/> Include Tab
Platform (standard__Platform)	<input checked="" type="checkbox"/>
Sales (standard__Sales)	<input checked="" type="checkbox"/>
Service (standard__Service)	<input checked="" type="checkbox"/>
Marketing (standard__Marketing)	<input checked="" type="checkbox"/>
Sample Console (standard__ServiceConsole)	<input checked="" type="checkbox"/>
High Volume Customer Portal User	<input checked="" type="checkbox"/>
Authenticated Website User	<input checked="" type="checkbox"/>
App Launcher (standard__AppLauncher)	<input checked="" type="checkbox"/>
Community (standard__Community)	<input checked="" type="checkbox"/>
Site.com (standard__Sites)	<input checked="" type="checkbox"/>
Salesforce Chatter (standard__Chatter)	<input checked="" type="checkbox"/>
Content (standard__Content)	<input checked="" type="checkbox"/>
Analytics Studio (standard__Insights)	<input checked="" type="checkbox"/>
Sales Console (standard__LightningSalesConsole)	<input checked="" type="checkbox"/>

Speakers (Realtek(R) Audio): 100%

Windows Search Task View Google Chrome WhatsApp ENG IN 04:25 PM 03-10-2023

S | T Tabs | Salesforce X

d5g00000khbjleaz-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2Fcustomtabs.jsp%3Fsetupid%3DCustomTabs%26retURL%3D%252Fset...

Cloud Search Setup

Setup Home Object Manager

Search tabs

User Interface

Rename Tabs and Labels

Tabs

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

SETUP Tabs

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

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

Action	Label	Tab Style	Description
Edit Del	colleges	Jewel	

Custom Object Tabs New What Is This?

Action Label Tab Style Description

Edit | Del colleges Jewel

Web Tabs New What Is This?

No Web Tabs have been defined

Visualforce Tabs New What Is This?

No Visualforce Tabs have been defined

Lightning Component Tabs New What Is This?

No Lightning component tabs have been defined

Lightning Page Tabs New What Is This?

No Lightning Page Tabs have been defined

Windows Search Google WhatsApp IN ENG 04:25 PM 03-10-2023

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

- Header:** Tabs | Salesforce
- Search Bar:** Search Setup
- Setup Tab:** Selected
- Object Manager:** Home
- Search Box:** tabs
- Left Sidebar:** User Interface - Rename Tabs and Labels, Tabs (selected)
- Main Content:**
 - Section:** Step 1. Enter the Details (Step 1 of 3)
 - Description:** Choose the custom object for this new custom tab. Fill in other details.
 - Object Selection:** Select an existing custom object or [create a new custom object now](#).
 - Object: department (selected)
 - Tab Style: Lightning (selected)
 - Optional Link:** (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--
 - Description:** Enter a short description.
- Footer:** Next, Cancel, ENG IN, 04:26 PM, 03-10-2023

S | T Tabs | Salesforce X

d5g00000khbjleaz-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2FobjectCustomTabWizard.jsp%3FretURL%3D%252Fsetup%252Fui%252F...

Cloud Search Setup Home Object Manager

Setup

tabs

User Interface

Rename Tabs and Labels

Tabs

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

SETUP Tabs

New Custom Object Tab

Help for this Page ? Step 2 of 3

Step 2. Add to Profiles

Choose the user profiles for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each profile.

Apply one tab visibility to all profiles Default On Apply a different tab visibility for each profile

Profile	Tab Visibility
Analytics Cloud Integration User	Default On
Analytics Cloud Security User	Default On
Authenticated Website	Default On
Authenticated Website	Default On
Contract Manager	Default On
Cross Org Data Proxy User	Default On
Custom: Marketing Profile	Default On
Custom: Sales Profile	Default On
Custom: Support Profile	Default On
Customer Community Login User	Default On
Customer Community Plus Login User	Default On

Windows Search File Google Chat 04:26 PM IN ENG 03-10-2023

S | T Tabs | Salesforce X

d5g00000khbjleaz-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2FobjectCustomTabWizard.jsp%3FretURL%3D%252Fsetup%252Fui%252F...

Cloud Search Setup

Setup Home Object Manager

tabs

User Interface

Rename Tabs and Labels

Tabs

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

SETUP Tabs

Step 3. Add to Custom Apps Step 3 of 3

Choose the custom apps for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each Custom App.

Custom App	<input checked="" type="checkbox"/> Include Tab
Platform (standard__Platform)	<input checked="" type="checkbox"/>
Sales (standard__Sales)	<input checked="" type="checkbox"/>
Service (standard__Service)	<input checked="" type="checkbox"/>
Marketing (standard__Marketing)	<input checked="" type="checkbox"/>
Sample Console (standard__ServiceConsole)	<input checked="" type="checkbox"/>
High Volume Customer Portal User	<input checked="" type="checkbox"/>
Authenticated Website User	<input checked="" type="checkbox"/>
App Launcher (standard__AppLauncher)	<input checked="" type="checkbox"/>
Community (standard__Community)	<input checked="" type="checkbox"/>
Site.com (standard__Sites)	<input checked="" type="checkbox"/>
Salesforce Chatter (standard__Chatter)	<input checked="" type="checkbox"/>
Content (standard__Content)	<input checked="" type="checkbox"/>
Analytics Studio (standard__Insights)	<input checked="" type="checkbox"/>
Sales Console (standard__LightningSalesConsole)	<input checked="" type="checkbox"/>

Windows Search Google WhatsApp ENG IN 04:26 PM 03-10-2023

Salesforce Setup page showing the Custom Tabs section.

The URL in the browser is: <https://d5g00000khbjleaz-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2Fcustomtabs.jsp%3Fsetupid%3DCustomTabs%26retURL%3D%252Fset...>

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	Jewel	
Edit Del	departments	Lightning	

Web Tabs

No Web Tabs have been defined

Visualforce Tabs

No Visualforce Tabs have been defined

Lightning Component Tabs

No Lightning component tabs have been defined

Setup Home Object Manager

Search Setup

Help for this Page

Custom Tabs

Home Object Manager

app

Salesforce Mobile App

Data

Mass Transfer Approval Requests

Apps

App Manager

AppExchange Marketplace

Connected Apps

Connected Apps OAuth Usage

Manage Connected Apps

Lightning Bolt

Flow Category

Lightning Bolt Solutions

Mobile Apps

Salesforce

Salesforce Branding

Salesforce Navigation

Salesforce Notifications

https://d5g00000khbjleaz-dev-ed.develop.lightning.force.com/one/one.app#/setup/NavigationMenus/home

04:27 PM 03-10-2023

Step 4: Create a Lightning App

App Manager | Salesforce

d5g00000khbjleaz-dev-ed.lightning.force.com/lightning/setup/NavigationMenus/home

New Lightning App

App Details & Branding

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

App Details

*App Name: My college

*Developer Name: My_college

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

Next

Salesforce Branding	12	Queue Management	QueueManagement	Create and manage queues for your business.	03/10/2023, 3:01 pm	Lightning	✓
Salesforce Navigation	13	Sales	Sales	The world's most popular sales force automation (SFA) solution	03/10/2023, 3:01 pm	Classic	▼
Salesforce Notifications	14	Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	03/10/2023, 3:01 pm	Lightning	✓

Search

04:27 PM 03-10-2023 ENG IN

App Manager | Salesforce

d5g00000khbjleaz-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home

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

	12	Queue Management	QueueManagement	Create and manage queues for your business.	03/10/2023, 3:01 pm	Lightning	<input checked="" type="checkbox"/>
Salesforce Branding	13	Sales	Sales	The world's most popular sales force automation (SFA) solution	03/10/2023, 3:01 pm	Classic	<input type="checkbox"/>
Salesforce Navigation	14	Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	03/10/2023, 3:01 pm	Lightning	<input checked="" type="checkbox"/>

Search ENG IN 04:28 PM 03-10-2023

App Manager | Salesforce

d5g00000khbjleaz-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home

New Lightning App

Type to filter list...

- Communication Subscription Timings
- Communication Subscriptions
- Consumption Schedules
- Contact Point Consent
- Contact Point Type Consent
- Contact Requests
- Contacts
- Contract Line Items
- Contracts
- Coupons

Background Operations

Calendar

Content

Back

Next

Order	Label	API Name	Description	Created	Type	Status
12	Queue Management	QueueManagement	Create and manage queues for your business.	03/10/2023, 3:01 pm	Lightning	✓
13	Sales	Sales	The world's most popular sales force automation (SFA) solution	03/10/2023, 3:01 pm	Classic	
14	Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	03/10/2023, 3:01 pm	Lightning	✓

04:28 PM 03-10-2023

App Manager | Salesforce

d5g00000khbjleaz-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home

New Lightning App

Type to filter list...

- Analytics Cloud Security User
- Authenticated Website
- Authenticated Website
- Contract Manager
- Custom: Marketing Profile
- Custom: Sales Profile
- Custom: Support Profile
- Customer Community Login User
- Customer Community Plus Login User
- Customer Community Plus User

Analytics Cloud Integration User

Back Save & Finish

Order	Label	Namespace	Description	Created Date	Lightning	Active
12	Queue Management	QueueManagement	Create and manage queues for your business.	03/10/2023, 3:01 pm	Lightning	✓
13	Sales	Sales	The world's most popular sales force automation (SFA) solution	03/10/2023, 3:01 pm	Classic	
14	Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	03/10/2023, 3:01 pm	Lightning	✓

04:29 PM 03-10-2023

S | (384) How to Convert JPG Image X | JPG to PDF - Convert your Image X | Downloads X | Recently Viewed | colleges | Sales X +

avseengineering-dev-ed.develop.lightning.force.com/lightning/o/college_c/list?filterName=Recent

Cloud icon | Search bar | Recent Viewed icon | More options

Assignment Details ▾ Cdepartments ▾ colleges ▾ Providers ▾ Consumers ▾ Managements ▾

colleges Recently Viewed ▾

0 items • Updated a few seconds ago

New Import Change Owner

college Name

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

Windows Start button | Search bar | Taskbar icons (File Explorer, Google Chrome, WhatsApp, Spotify, File Manager) | System tray icons (Battery, Network, Volume, Language, Date/Time)



Search...



Service

Home

Chatter

Accounts

Contacts

Cases

Reports

Dashboards

colleges

departments

Details

Consumers

More

i



department
CSE

New Contact

Edit

New Opportunity

Related

Details

department Name

CSE



college

AVS ENGINEERING COLLEGE

Created By

Selvaraja S, 13/10/2023, 2:43 pm

Last Modified By

Selvaraja S, 13/10/2023, 2:43 pm



Search...



Service

Home

Chatter

Accounts ▾

Contacts ▾

Cases ▾

Reports ▾

Dashboards ▾

colleges ▾

departments ▾

Details ▾

Consumers ▾

More ▾

i

department
ECE

New Contact

Edit

New Opportunity



Related

Details

department Name

ECE

college

AVS ENGINEERING COLLEGE



Created By

[Selvaraja S](#), 13/10/2023, 2:44 pm

Last Modified By

[Selvaraja S](#), 13/10/2023, 2:44 pm



Search...



Service

Home

Chatter

Accounts ▾

Contacts ▾

Cases ▾

Reports ▾

Dashboards ▾

colleges ▾

departments ▾

Details ▾

Consumers ▾

More ▾

i



college

AVS ENGINEERING COLLEGE

New Contact

Edit

New Opportunity

▼

Related

Details

college Name

AVS ENGINEERING COLLEGE

Owner

Selvaraja S



Total_count

2

Created By

Selvaraja S, 13/10/2023, 2:42 pm

Last Modified By

Selvaraja S, 13/10/2023, 2:44 pm

2. If there are 2 users, User A and User B in the organization 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.

Solution:

The screenshot shows the Salesforce Object Manager setup page. The URL in the browser is avseengineering-dev-ed.lightning.force.com/lightning/setup/ObjectManager/page?address=%2F01I%2Fe%3FretURL%3D%2Fsetup%2Fobject%2Fmanager. The page title is "Object Manager | Salesforce". The main heading is "Object Manager". The sub-section is "Custom Object Definition Edit". The object name is "Providers". The "Label" field contains "Providers" and the "Example" field contains "Account". The "Plural Label" field contains "Providers" and the "Example" field contains "Accounts". There is a checkbox for "Starts with vowel sound" which is unchecked. The "Object Name" field also contains "Providers" and the "Example" field contains "Account". The "Description" field is empty. Under "Context-Sensitive Help Setting", the radio button for "Open the standard Salesforce.com Help & Training window" is selected. The "Content Name" dropdown is set to "-None-". In the "Enter Record Name Label and Format" section, the "Record Name" field contains "Providers Name" and the "Example" field contains "Account Name". The "Data Type" dropdown is set to "Text". The bottom status bar shows system icons and the date/time "16-10-2023 04:04 PM".

Object Manager | Salesforce

avseengineering-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/page?address=%2F01l%2Fe%3FappLayout%3Dsetup%26retURL%3D%252F01l5j000003DCqA%253Fsetup...

Cloud Search Setup Object Manager

SETUP Object Manager

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: Consumers Example: Account

Plural Label: Consumers Example: Accounts

Starts with vowel sound

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

Object Name: Consumers 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

Search

04:04 PM 16-10-2023 ENG IN

Home | Salesforce

avseengineering-dev-ed.develop.lightning.force.com/lightning/setup/SetupOneHome/home

Cloud icon

Search Setup

Setup Home Object Manager

tabs

User Interface

Rename Tabs and Labels

Tabs

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

SETUP Home

Get Started with Einstein Bots

Launch an AI-powered bot to automate your digital connections.

Mobile Publisher

Use the Mobile Publisher to create your own branded mobile app.

Real-time Collaborative Docs

Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce.

Create

Most Recently Used

10 items

NAME	TYPE	OBJECT
college	Custom Object Definition	
Cdepartment	Custom Object Definition	

Search

File icon

Cloud icon

Phone icon

Spotify icon

Folder icon

Gear icon

Book icon

Lightning bolt icon

ENG IN

04:05 PM 16-10-2023

Salesforce Tabs | Salesforce

avseengineering-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2FobjectCustomTabWizard.jsp%3FretURL%3D%252Fsetup%252Fui%252Fc...

Cloud Search Bar: Search Setup

Setup Home Object Manager

Search bar: tabs

User Interface: Rename Tabs and Labels, Tabs (selected)

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

Setup Step 1 of 3: New Custom Object Tab

Step 1. Enter the Details: Choose the custom object for this new custom tab. Fill in other details.

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

Object: --None-- (dropdown menu open, Consumers selected)

Tab Style: --None--, Consumers, Providers (dropdown menu open, Consumers selected)

(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-- (dropdown menu open)

Enter a short description.

Description: (Text area)

Buttons: Next, Cancel

Salesforce Tabs | Salesforce

avseengineering-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2FobjectCustomTabWizard.jsp%3FretURL%3D%252Fsetup%252Fui%252Fcu...

Cloud Search Setup Object Manager

Setup Home Object Manager

tabs

User Interface

Rename Tabs and Labels

Tabs

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

SETUP Tabs

New Custom Object Tab

Step 1 of 3

Step 1. Enter the Details

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

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

Object: Consumers

Tab Style: Diamond

(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

Search

Cloud Search

File

Messages

Spotify

Folder

Settings

Help

ENG IN 04:05 PM 16-10-2023

Salesforce Tabs | Salesforce

avseengineering-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2FobjectCustomTabWizard.jsp%3FretURL%3D%252Fsetup%252Fui%252Fcu...

Cloud Search Setup Object Manager

Setup Home Object Manager

tabs

User Interface

Rename Tabs and Labels

Tabs

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

SETUP Tabs

New Custom Object Tab

Step 1 of 3

Step 1. Enter the Details

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

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

Object: Providers

Tab Style: Hexagon

(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

Search

Cloud Search

File

Messages

Spotify

Folder

Settings

Help

ENG IN 04:05 PM 16-10-2023

Salesforce Tabs | avsengineering-dev-ed.develop.lightning.force.com

Search Setup

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 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	Cdepartments	Lightning	
Edit Del	colleges	Jewel	
Edit Del	Consumers	Diamond	
Edit Del	Details	Pencil	
Edit Del	Providers	Hexagon	

Web Tabs

No Web Tabs have been defined

Visualforce Tabs

No Visualforce Tabs have been defined

Search

Cloud

File

Home

Messages

Spotify

Folder

Settings

Help

ENG IN 04:06 PM 16-10-2023

Tabs | Salesforce Home | Salesforce

avseengineering-dev-ed.develop.lightning.force.com/lightning/setup/SetupOneHome/home

Cloud icon, Search Setup, Setup Home Object Manager

Setup Home

Search bar: profil

Users: Profiles

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

Get Started with Einstein Bots: Launch an AI-powered bot to automate your digital connections. Get Started

Mobile Publisher: Use the Mobile Publisher to create your own branded mobile app. Learn More

Real-time Collaborative Docs: Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce. Get Started

Most Recently Used: 10 items

NAME	TYPE	OBJECT
supportforce	Custom App	
Providers	Custom Tab Definition	
Providers	Custom Tab Definition	

Search, File, Home, Chat, Analytics, Folders, Settings, Help, Notifications, User Profile

ENG IN 04:08 PM 16-10-2023

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

- Header:** Tabs | Salesforce and Profiles | Salesforce.
- Search Bar:** Search Setup.
- Top Navigation:** Setup, Home, Object Manager.
- Left Sidebar:** Global search bar (profil), Users (selected), and Profiles tab.
- Page Title:** SETUP Profiles.
- Section Header:** Profiles.
- Filter:** All Profiles (Edit | Delete | Create New View).
- Table:** A list of profiles with columns: Action, Profile Name, User License, and Custom.

Action	Profile Name	User License	Custom
Edit Del ...	Custom: Marketing Profile	Salesforce	✓
Edit Del ...	Custom: Sales Profile	Salesforce	✓
Edit Del ...	Custom: Support Profile	Salesforce	✓
Edit Clone	Customer Community Login User	Customer Community Login	
Edit Clone	Customer Community Plus Login User	Customer Community Plus Login	
Edit Clone	Customer Community Plus User	Customer Community Plus	
Edit Clone	Customer Community User	Customer Community	
Edit Clone	Customer Portal Manager Custom	Customer Portal Manager Custom	
Edit Clone	Customer Portal Manager Standard	Customer Portal Manager Standard	
Edit Clone	External Apps Login User	External Apps Login	
Edit Clone	External Identity User	External Identity	
Edit Clone	Force.com - App Subscription User	Force.com - App Subscription	
Edit Clone	Force.com - Free User	Force.com - Free	
Edit Clone	Gold Partner User	Gold Partner	
Edit Clone	High Volume Customer Portal	High Volume Customer Portal	

- Page Footer:** javascript:ListViewport.instances%5B%2700B5j00000bHR1g%27%5D.getListData%28%7B%27rolodexIndex%27%3A18%7D%29, Page 1 of 2, 0 Selected, 1-25 of 40, Help for this Page, and system status icons.

Tabs | Salesforce Profiles | Salesforce

avseengineering-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/home

Cloud icon, Search Setup, Setup Home, Object Manager, Global Search (profil), Users (Profiles selected), Didn't find what you're looking for? Try using Global Search.

SETUP Profiles

Profiles

All Profiles | Edit | Delete | Create New View

New Profile |

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

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

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

javascript:srcUp(%27%2F00e5j000005BvrU%3Fisntp%3Dp1%27);

Windows taskbar icons: File Explorer, Search, Task View, File Cabinet, Chat (1), Spotify, Folder, Settings, Microsoft Edge, and others. System tray icons: ENG IN, 04:08 PM, 16-10-2023.



Search Setup



Setup

Home

Object Manager

profile

Users

Profiles



SETUP

Profiles

Profile

Standard Platform User

Help for this Page

Didn't find what you're looking for?

Try using Global Search.

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges \[0\]](#) | [Enabled Apex Class Access \[7\]](#) | [Enabled Visualforce Page Access \[0\]](#) | [Enabled External Data Source Access \[0\]](#) | [Enabled Named Credential Access \[0\]](#) |
[Enabled External Credential Principal Access \[0\]](#) | [Enabled Custom Metadata Type Access \[0\]](#) | [Enabled Custom Setting Definitions Access \[1\]](#) | [Enabled Flow Access \[0\]](#) | [Enabled Service Presence Status Access \[0\]](#) |
[Enabled Custom Permissions \[0\]](#)

Profile Detail

[Edit](#) [Clone](#) [View Users](#)

Name Standard Platform User

User License Salesforce Platform

Custom Profile

Created By salesforce.com, inc., 22/08/2023, 11:27 am

Modified By [Selvaraja S.](#), 23/10/2023, 11:52 pm

Page Layouts

Standard Object Layouts

Global [Global Layout](#)
[[View Assignment](#)]

Object Milestone [Object Milestone Layout](#)
[[View Assignment](#)]

Email Application Not Assigned
[[View Assignment](#)]

Operating Hours [Operating Hours Layout](#)
[[View Assignment](#)]

Salesforce | Tabs | Salesforce | Profiles | Salesforce

avseengineering-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F_ui%2Fperms%2Fui%2Fprofile%2FProfileClone%2Fe%3Fid%3D00e5j000005BvrU%26retU...

Cloud icon

Setup Home Object Manager

profil

Users Profiles

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

SETUP Profiles

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

Existing Profile	Standard Platform User
User License	Salesforce Platform
Profile Name	<input type="text" value="Provider"/>

Save Cancel

Windows Start button Search

ENG IN 04:09 PM 16-10-2023



Search Setup



Setup

Home

Object Manager

profile

Users

Profiles

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



SETUP

Profiles

Help for this Page

Profile

Provider

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.

Try using Global Search.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges \[0\]](#) | [Enabled Apex Class Access \[7\]](#) | [Enabled Visualforce Page Access \[0\]](#) | [Enabled External Data Source Access \[0\]](#) | [Enabled Named Credential Access \[0\]](#) |
[Enabled External Credential Principal Access \[0\]](#) | [Enabled Custom Metadata Type Access \[0\]](#) | [Enabled Custom Setting Definitions Access \[1\]](#) | [Enabled Flow Access \[0\]](#) | [Enabled Service Presence Status Access \[0\]](#) |
[Enabled Custom Permissions \[0\]](#)

Profile Detail

[Edit](#) [Clone](#) [Delete](#) [View Users](#)

Name Provider

Custom Profile

User License Salesforce Platform

Description

Created By [Selvaraja S](#), 16/10/2023, 7:41 pm

Modified By [Selvaraja S](#), 23/10/2023, 11:52 pm

Page Layouts

Standard Object Layouts

Global

[Global Layout](#)
[View Assignment]

Object Milestone

[Object Milestone Layout](#)
[View Assignment]

Email Application Not Assigned

Operating Hours

[Operating Hours Layout](#)

Salesforce Tabs | Salesforce Profiles | Salesforce

avseengineering-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j000005IKsu%2Fe%3FretURL%3D%252F00e5j000005IKsu%253Fsetupid%253DEnh...

Cloud Search Setup Home Object Manager

Search Setup

Setup

profil

Users Profiles

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

SETUP Profiles

Profile Edit

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

Save Save & New Cancel

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"/>
Assignment (Assignment)	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>			

Service Provider Access

Tab Settings

Overwrite users' personal tab customizations

Standard Tab Settings

Home	Default On	Inventory Reservations	Tab Hidden
Accounts	Default On	Invoices	Tab Hidden
Alert Settings	Default On	Learning	Default On
All Sites	Tab Hidden	Libraries	Tab Hidden

Search

04:09 PM 16-10-2023 ENG IN

Salesforce Setup - Profiles

Search Setup

Setup Home Object Manager

profil

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

Profiles

Contact Point Addresses Contact Point Consents Contact Point Emails

Sellers Streaming Channels User External Credentials

Custom Object Permissions

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Cdepartments	<input type="checkbox"/>	<input type="checkbox"/>				
colleges	<input type="checkbox"/>	<input type="checkbox"/>				
Consumers	<input checked="" type="checkbox"/>	<input type="checkbox"/>				

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

Password complexity requirement: Must include alpha and numeric characters

Cloud Search Home Object Manager

ENG IN 04:11 PM 16-10-2023

Salesforce | Tabs | Salesforce | Profiles | Salesforce

avseengineering-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j000005IKsu%2Fe%3FretURL%3D%252F00e5j000005IKsu%253Fsetupid%253DEnh...

Cloud Search Setup Home Object Manager

profil

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

SETUP Profiles

Departments Details Providers

	colleges	Consumers	Details	Providers
Couepartments	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
colleges	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Consumers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" 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
Password complexity requirement:	Must include alpha and numeric characters
Password question requirement:	Cannot contain password
Maximum invalid login attempts:	10
Lockout effective period:	15 minutes
Obscure secret answer for password resets:	<input type="checkbox"/>
Require a minimum 1 day password lifetime:	<input type="checkbox"/>
Don't immediately expire links in forgot password emails:	<input type="checkbox"/> i

Save Save & New Cancel

Windows Taskbar: Search, File Explorer, Task View, Taskbar Icons, System Tray: ENG IN, 04:11 PM, 16-10-2023



Search Setup



Setup

Home

Object Manager

profile

Users

Profiles

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



SETUP

Profiles

Profile

Provider

Help for this Page

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges \[0\]](#) | [Enabled Apex Class Access \[7\]](#) | [Enabled Visualforce Page Access \[0\]](#) | [Enabled External Data Source Access \[0\]](#) | [Enabled Named Credential Access \[0\]](#) |
[Enabled External Credential Principal Access \[0\]](#) | [Enabled Custom Metadata Type Access \[0\]](#) | [Enabled Custom Setting Definitions Access \[1\]](#) | [Enabled Flow Access \[0\]](#) | [Enabled Service Presence Status Access \[0\]](#) |
[Enabled Custom Permissions \[0\]](#)

Profile Detail

[Edit](#) [Clone](#) [Delete](#) [View Users](#)

Name

Provider

User License

Salesforce Platform

Custom Profile



Description

Created By [Selvaraja S.](#), 16/10/2023, 7:41 pm

Modified By [Selvaraja S.](#), 23/10/2023, 11:52 pm

Page Layouts

Standard Object Layouts

Global [Global Layout](#)
[[View Assignment](#)]

Object Milestone [Object Milestone Layout](#)
[[View Assignment](#)]

Email Application Not Assigned

Operating Hours [Operating Hours Layout](#)

Salesforce | Tabs | Salesforce | Profiles | Salesforce

avseengineering-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F005%3FisUserEntityOverride%3D1%26id%3D00e5j000005IKsu%26SetupNode%3DEnhanc...

Cloud icon, Search bar (Search Setup), Global navigation icons.

Setup Home Object Manager

Search bar: profil

Users: Profiles

Provider

Help for this Page ?

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

On this page you can create, view, and manage users.
To get more licenses, use the Your Account app. [Let's Go](#)

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

Full Name ↑	Alias	Username	Role	Active	Profile
No records to display.					

New User Reset Password(s) Add Multiple Users

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

Windows taskbar: Search, File Explorer, Task View, Taskbar settings, File Explorer, Taskbar settings, Taskbar settings, Taskbar settings, Taskbar settings, Taskbar settings, Taskbar settings.

System tray: Volume, Network, Battery, Date and Time (04:12 PM, 16-10-2023).

Tabs | Salesforce

Users | Salesforce

avseengineering-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005%2Fe%3FretURL%3D%252F005%253FisUserEntityOverride%253D1%2526id%253D00e5j0... ↗ ☆ ☰ ⚙️ 🌐

Cloud icon

Search Setup

Setup Home Object Manager

profil

Users Profiles

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

SETUP Users

New User

User Edit Save Save & New Cancel

General Information | = Required Information

First Name	Provider	Role	Marketing Team
Last Name	1	User License	Salesforce Platform
Alias	p1	Profile	Provider
Email	prov1@gmail.com	Active	<input checked="" type="checkbox"/>
Username	prov1@gmail.com	Marketing User	<input type="checkbox"/>
Nickname	User169745293597519621	Offline User	<input type="checkbox"/>
Title		Knowledge User	<input type="checkbox"/>
Company		Flow User	<input type="checkbox"/>
Department		Service Cloud User	<input type="checkbox"/>
Division		Site.com Contributor User	<input type="checkbox"/>
		Site.com Publisher User	<input type="checkbox"/>
		WDC User	<input type="checkbox"/>
		Data.com User Type	--None--
		Data.com Monthly Addition Limit	Default Limit (300)
		Accessibility Mode (Classic Only)	<input type="checkbox"/>
		High-Contrast Palette on Charts	<input type="checkbox"/>

Cloud icon

Search

File icon

Google Sheets icon

WhatsApp icon

Spotify icon

Folder icon

Gear icon

Book icon

Map icon

Up arrow

ENG IN

04:13 PM 16-10-2023

Tabs | Salesforce Users | Salesforce

avseengineering-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F0055j00000AkKB%3Fnoredirect%3D1%26isUserEntityOverride%3D1

Cloud Search Bar: Search Setup

Setup Home Object Manager

Global Search: profil

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

Provider 1

User Detail

User Detail		Edit Sharing Reset Password Freeze	
Name	Provider 1	Role	Marketing Team
Alias	p1	User License	Salesforce Platform
Email	prov1@gmail.com [Verify] i	Profile	Provider
Username	prov1@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	User16974529359751962113 i	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		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	View
Delegated Approver		Data.com User Type	i
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/> i
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/> i
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/> i
App Registration: One-Time Password	i	Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/> i

User ProfileHelp for this Page [?](#)

System Icons: Windows, Search, File, Chat, Mail, Spotify, Folder, Settings, Help

System Status: ENG IN 04:13 PM 16-10-2023

Salesforce | Tabs | Salesforce | Profiles | Salesforce

avseengineering-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/home

Cloud Search Bar: Search Setup

Setup Home Object Manager

Global Search: profil

Users Profiles

Help for this Page

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

Profiles

All Profiles | Edit | Delete | Create New View

New Profile

Action | Profile Name ↑ | User License | Custom

Action	Profile Name	User License	Custom
Edit Clone	Analytics Cloud Integration User	Analytics Cloud Integration User	<input type="checkbox"/>
Edit Clone	Analytics Cloud Security User	Analytics Cloud Integration User	<input type="checkbox"/>
Edit Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
Edit Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
Edit Del ...	B2B Reordering Portal Buyer Profile	External Apps Login	<input checked="" type="checkbox"/>
Edit Clone	Chatter External User	Chatter External	<input type="checkbox"/>
Edit Clone	Chatter Free User	Chatter Free	<input type="checkbox"/>
Edit Clone	Chatter Moderator User	Chatter Free	<input type="checkbox"/>
Edit Clone	Contract Manager	Salesforce	<input type="checkbox"/>
Edit Clone	Cross Org Data Proxy User	XOrg Proxy User	<input type="checkbox"/>
Edit Del ...	Custom: Marketing Profile	Salesforce	<input checked="" type="checkbox"/>
Edit Del ...	Custom: Sales Profile	Salesforce	<input checked="" type="checkbox"/>
Edit Del ...	Custom: Support Profile	Salesforce	<input checked="" type="checkbox"/>
Edit Clone	Customer Community Login User	Customer Community Login	<input type="checkbox"/>
Edit Clone	Customer Community Plus Login User	Customer Community Plus Login	<input type="checkbox"/>

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

1-25 of 41 | 0 Selected | Previous | Next | Page 1 of 2

javascript:ListViewport.instances%5B%2700B5j00000bHR1g%27%5D.getListData%28%7B%27...

Windows Taskbar: Search, File Explorer, Chat, Spotify, Folder, Settings, Microsoft Edge, Microsoft Store

System Tray: ENG IN, Volume, Network, Date: 16-10-2023, Time: 04:13 PM

Tabs | Salesforce Profiles | Salesforce

avseengineering-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/home

Cloud icon, Search Setup, Setup Home, Object Manager, Global Search (profil), Users (Profiles selected), Didn't find what you're looking for? Try using Global Search.

SETUP Profiles

Help for this Page

All Profiles | Edit | Delete | Create New View

New Profile

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

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

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

javascript:srcUp(%27%2F00e5j000005BvrU%3Fisntp%3Dp1%27);

Windows taskbar icons: File Explorer, Search, Task View, File Cabinet, Chat (1), Spotify, Folder, Settings, Microsoft Edge, and others. System tray icons: ENG IN, 04:13 PM, 16-10-2023.



Search Setup



Setup

Home

Object Manager

profile

Users

Profiles

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



SETUP

Profiles

Profile

Standard Platform User

Help for this Page

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.
If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges \[0\]](#) | [Enabled Apex Class Access \[7\]](#) | [Enabled Visualforce Page Access \[0\]](#) | [Enabled External Data Source Access \[0\]](#) | [Enabled Named Credential Access \[0\]](#) |
[Enabled External Credential Principal Access \[0\]](#) | [Enabled Custom Metadata Type Access \[0\]](#) | [Enabled Custom Setting Definitions Access \[1\]](#) | [Enabled Flow Access \[0\]](#) | [Enabled Service Presence Status Access \[0\]](#) |
[Enabled Custom Permissions \[0\]](#)

Profile Detail

[Edit](#) [Clone](#) [View Users](#)

Name Standard Platform User

User License Salesforce Platform

Custom Profile

Created By salesforce.com, inc., 22/08/2023, 11:27 am

Modified By Selvaraja S, 23/10/2023, 11:52 pm

Page Layouts

Standard Object Layouts

Global	Global Layout [View Assignment]	Object Milestone	Object Milestone Layout [View Assignment]
Email Application	Not Assigned [View Assignment]	Operating Hours	Operating Hours Layout [View Assignment]



Search Setup



Setup

Home

Object Manager

profile

Users

Profiles

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

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges \[0\]](#) | [Enabled Apex Class Access \[7\]](#) | [Enabled Visualforce Page Access \[0\]](#) | [Enabled External Data Source Access \[0\]](#) | [Enabled Named Credential Access \[0\]](#) |
[Enabled External Credential Principal Access \[0\]](#) | [Enabled Custom Metadata Type Access \[0\]](#) | [Enabled Custom Setting Definitions Access \[1\]](#) | [Enabled Flow Access \[0\]](#) | [Enabled Service Presence Status Access \[0\]](#) |
[Enabled Custom Permissions \[0\]](#)

Profile Detail

[Edit](#) [Clone](#) [Delete](#) [View Users](#)

Name	Consumer	Custom Profile	<input checked="" type="checkbox"/>
User License	Salesforce Platform		
Description			
Created By	Selvaraja S , 16/10/2023, 8:09 pm	Modified By	Selvaraja S , 23/10/2023, 11:52 pm

Page Layouts

Standard Object Layouts

Global	Global Layout [View Assignment]	Object Milestone	Object Milestone Layout [View Assignment]
Email Application	Not Assigned	Operating Hours	Operating Hours Layout

Salesforce | Tabs | Salesforce | Profiles | Salesforce

avseengineering-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j000005IKt9%2Fe%3FretURL%3D%252F00e5j000005IKt9%253Fsetupid%253DEnhanc...

Setup Home Object Manager

Search Setup

profil

Users Profiles

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

SETUP Profiles

Profile Edit Consumer

Help for this Page ?

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

Profile Edit Save Save & New Cancel

Custom App Settings

	Visible	Default	Visible	Default
Analytics Studio (standard_Insights)	<input type="checkbox"/>	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>	<input type="radio"/>
App Launcher (standard_AppLauncher)	<input type="checkbox"/>	<input checked="" type="radio"/>	<input type="checkbox"/>	<input checked="" type="radio"/>
Assignment (Assignment)	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>	<input type="checkbox"/>	<input type="radio"/>

Service Provider Access

Tab Settings

Overwrite users' personal tab customizations

ENG IN 04:14 PM 16-10-2023

Salesforce | Tabs | Salesforce | Profiles | Salesforce

avseengineering-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j000005IKt9%2Fe%3FretURL%3D%252F00e5j000005IKt9%253Fsetupid%253DEnhanc...

Cloud icon, Search Setup, Home, Object Manager, Setup

Search bar: profil

Users: Profiles

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

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	
Cdepartments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
colleges	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Consumers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

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

Session Settings

Session Times Out After: 2 hours of inactivity

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

Password Policies

User passwords expire in: 90 days

Enforce password history: 3 passwords remembered

Minimum password length: 8

Password complexity requirement: Must include alpha and numeric characters

Password question requirement: Cannot contain password

Cloud icon, Search, File, Chat, Mail, Spotify, Folders, Settings, Help, ENG IN, 04:14 PM, 16-10-2023

Salesforce | Tabs | Salesforce | Profiles | Salesforce

avseengineering-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j000005IKt9%2Fe%3FretURL%3D%252F00e5j000005IKt9%253Fsetupid%253DEnhanc...

Cloud Search Setup Home Object Manager

profil

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

SETUP Profiles

Departments Details Providers

	Colleges	Consumers	Details	Providers
Colleges	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Consumers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" 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
Password complexity requirement:	Must include alpha and numeric characters
Password question requirement:	Cannot contain password
Maximum invalid login attempts:	10
Lockout effective period:	15 minutes
Obscure secret answer for password resets:	<input type="checkbox"/>
Require a minimum 1 day password lifetime:	<input type="checkbox"/>
Don't immediately expire links in forgot password emails:	<input type="checkbox"/> <small>i</small>

Save Save & New Cancel

Windows Taskbar: Search, File Explorer, Task View, Taskbar Icons, System Tray: ENG IN, 04:14 PM, 16-10-2023



Search Setup



Setup

Home

Object Manager

profile

Users

Profiles

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



SETUP

Profiles

Profile

Consumer

Help for this Page

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges \[0\]](#) | [Enabled Apex Class Access \[7\]](#) | [Enabled Visualforce Page Access \[0\]](#) | [Enabled External Data Source Access \[0\]](#) | [Enabled Named Credential Access \[0\]](#) |
[Enabled External Credential Principal Access \[0\]](#) | [Enabled Custom Metadata Type Access \[0\]](#) | [Enabled Custom Setting Definitions Access \[1\]](#) | [Enabled Flow Access \[0\]](#) | [Enabled Service Presence Status Access \[0\]](#) |
[Enabled Custom Permissions \[0\]](#)

Profile Detail

[Edit](#) [Clone](#) [Delete](#) [View Users](#)

Name Consumer

User License Salesforce Platform

Custom Profile

Description

Created By [Selvaraja S](#), 16/10/2023, 8:09 pm

Modified By [Selvaraja S](#), 23/10/2023, 11:52 pm

Page Layouts

Standard Object Layouts

Global [Global Layout](#)
[View Assignment]

Object Milestone [Object Milestone Layout](#)
[View Assignment]

Email Application Not Assigned

Operating Hours [Operating Hours Layout](#)

Salesforce | Tabs | Salesforce | Profiles | Salesforce

avseengineering-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F005%3FisUserEntityOverride%3D1%26id%3D00e5j000005Ik9%26SetupNode%3DEnhanc...

Cloud icon, Search bar (Search Setup), Global navigation icons.

Setup Home Object Manager

profil

Users Profiles

Consumer

Help for this Page ?

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

On this page you can create, view, and manage users.
To get more licenses, use the Your Account app. [Let's Go](#)

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

Full Name ↑	Alias	Username	Role	Active	Profile
No records to display.					

New User Reset Password(s) Add Multiple Users

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

Windows taskbar icons: File Explorer, Search, Task View, File, Chat, Google Chrome, WhatsApp, Spotify, File, Settings, Microsoft Edge.

System tray: ENG IN, 04:15 PM, 16-10-2023.

Tabs | Salesforce

Users | Salesforce

avseengineering-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005%2Fe%3FretURL%3D%252F005%253FisUserEntityOverride%253D1%2526id%253D00e5j0... ↗ ☆ ☰ ⚙️ 🌐

Cloud icon

Search Setup

Setup Home Object Manager

profil

Users Profiles

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

SETUP Users

New User

User Edit Save Save & New Cancel

General Information

= Required Information

First Name	Consumer	Role	Marketing Team
Last Name	1	User License	Salesforce Platform
Alias	c1	Profile	Consumer
Email	cons1@gmail.com	Active	<input checked="" type="checkbox"/>
Username	cons1@gmail.com	Marketing User	<input type="checkbox"/>
Nickname	User169745311050641524	Offline User	<input type="checkbox"/>
Title		Knowledge User	<input type="checkbox"/>
Company		Flow User	<input type="checkbox"/>
Department		Service Cloud User	<input type="checkbox"/>
Division		Site.com Contributor User	<input type="checkbox"/>
		Site.com Publisher User	<input type="checkbox"/>
		WDC User	<input type="checkbox"/>
		Data.com User Type	--None--
		Data.com Monthly Addition Limit	Default Limit (300)
		Accessibility Mode (Classic Only)	<input type="checkbox"/>
		High-Contrast Palette on Charts	<input type="checkbox"/>

Cloud icon

Search

File icon

Google Sheets icon

WhatsApp icon

Spotify icon

Folder icon

Gear icon

Book icon

Map icon

ENG IN 04:15 PM 16-10-2023

Tabs | Salesforce

Users | Salesforce

avseengineering-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005%2Fe%3FretURL%3D%252F005%253FisUserEntityOverride%253D1%2526id%253D00e5j0...

Cloud icon

Search Setup

Setup Home Object Manager

profil

Users Profiles

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

SETUP

Users

City Zip/Postal Code State/Province Country

Single Sign On Information Federation ID

Locale Settings Time Zone (GMT+05:30) India Standard Time (Asia/Kolkata)
Locale English (India)
Language English

Approver Settings Delegated Approver Manager
Receive Approval Request Emails Only if I am an approver

Generate new password and notify user immediately

Save Save & New Cancel

Cloud icon

Search

File icon

Google Sheets icon

WhatsApp icon

Spotify icon

Folder icon

Gear icon

Red square icon

Blue square icon

ENG IN

04:15 PM 16-10-2023

Salesforce Tabs | Salesforce Users | Salesforce

avseengineering-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F0055j00000AkK9V%3Fnoredirect%3D1%26isUserEntityOverride%3D1

Cloud Search Setup

Setup Home Object Manager

users

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

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

SETUP

Users

User Consumer 1

Consumer 1

Permission Set Assignments [0] | Permission Set Assignments: Activation Required [0] | Permission Set Group Assignments [0] | Permission Set License Assignments [0] | Personal Groups [0] | Public Group Membership [0] | Queue Membership [0] | Team [0] | Managers in the Role Hierarchy [0] | OAuth Apps [0] | Third-Party Account Links [0] | Installed Mobile Apps [0] | Authentication Settings for External Systems [0] | Login History [0+] | User Provisioning Accounts [0]

User Detail

Name: Consumer 1

Alias: c1

Email: cons1@gmail.com [Verify] [i](#)

Username: cons1@gmail.com

Nickname: User169745311050641524 [i](#)

Title:

Company:

Department:

Division:

Address:

Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata)

Locale: English (India)

Language: English

Delegated Approver:

Manager:

Receive Approval Request Emails: Only if I am an approver

Federation ID:

App Registration: One-Time Password [i](#)

Role: Marketing Team

User License: Salesforce Platform

Profile: Consumer

Active:

Marketing User:

Offline User:

Knowledge User:

Flow User:

Service Cloud User:

Site.com Contributor User:

Site.com Publisher User:

WDC User:

Mobile Push Registrations: [View](#)

Data.com User Type: [i](#)

Accessibility Mode (Classic Only): [i](#)

Debug Mode: [i](#)

High-Contrast Palette on Charts: [i](#)

Load Lightning Pages While Scrolling: [i](#)

Search

Cloud Search

File

Messages

Spotify

Folder

Settings

Help

ENG IN

04:16 PM

16-10-2023



Search Setup



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SETUP

Users

All Users

Help for this Page ?

On this page you can create, view, and manage users.

To get more licenses, use the Your Account app. [Let's Go](#)

View: [All Users](#) [Edit](#) | [Create New View](#)

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

[New User](#) [Reset Password\(s\)](#) [Add Multiple Users](#)

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	User_Security	sec	insightssecurity@00d5j00000cisenean.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User
Edit	User_Integration	integ	integration@00d5j00000cisenean.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
Edit	S_Selvaraja	SS	selvaraja@naanmudhalvan.com		<input checked="" type="checkbox"/>	System Administrator
Edit	Chatter_Expert	Chatter	chatty_00d5j00000cisenean.g46uwwf5e1ew@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
Edit	2_Provider	p2	prov2@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Provider
Edit	2_Consumer	c2	cons2@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Consumer
Edit	02_manager	m02	man02@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Solution Manager
Edit	01_manager	m01	man01@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Manager

Tabs | Salesforce Permission Sets | Salesforce

avseengineering-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/home

Setup Home Object Manager

Search Setup

perm

Users

- Permission Set Groups
- Permission Sets**

Custom Code

Custom Permissions

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

SETUP

Permission Sets

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

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

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

Action	Permission Set Label	Description	License
<input type="checkbox"/>	Clone Buyer	Allows access to the store. Lets users see products and categories, ...	B2B Buyer Permission Set One Seat
<input type="checkbox"/>	Clone Buyer Manager	Includes all Buyer capabilities, and allows access to manage carts an...	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/>	Clone C360 High Scale Flow Integration User	Allows integration user to access features specific to C360 High Scal...	Cloud Integration User
<input type="checkbox"/>	Clone CRM User	Denotes that the user is a Sales Cloud or Service Cloud user.	CRM User
<input type="checkbox"/>	Clone Commerce Admin	Allow access to commerce admin features.	Commerce Admin Permission Set License Seat
<input type="checkbox"/>	Clone Contact Center Admin	Manage Service Cloud Voice contact centers that use Amazon Conne...	Service Cloud Voice User
<input type="checkbox"/>	Clone Contact Center Agent	Access agent features in Service Cloud Voice contact centers that us...	Service Cloud Voice User
<input type="checkbox"/>	Clone Contact Center Supervisor	Access supervisor features in Service Cloud Voice contact centers th...	Service Cloud Voice User
<input type="checkbox"/>	Del Clone Experience Profile Manager	Lets users create, read, edit, and delete locations, sublocations, que...	Salesforce
<input type="checkbox"/>	Clone Facility Manager	Give your mobile workforce access to the Field Service mobile app. S...	Field Service Mobile
<input type="checkbox"/>	Clone Merchandiser	Allow access to commerce merchandising features.	Commerce Merchandiser User Permission Set License Seat
<input type="checkbox"/>	Clone Order Management Agent	Read Access to all entities enabled by Order Management	Lightning Order Management User
<input type="checkbox"/>	Clone Order Management Operations Manager	Access to all features enabled by Order Management	Lightning Order Management User

1-25 of 29 | 0 Selected | Previous | Next | Page 1 of 2

https://avseengineering-dev-ed.develop.lightning.force.com/one/one.app#/setup/PermSets/home

Search

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Tabs | Salesforce Permission Sets | Salesforce

avseengineering-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2Fudd%2FPermissionSet%2FnewPermissionSet.apexp

Cloud icon, Search Setup, Setup icon, Home, Object Manager, Help icon, Notifications icon.

Setup, Home, Object Manager.

Search bar: permis

Users: Permission Set Groups, **Permission Sets**, Help for this Page.

Custom Code: Custom Permissions.

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

Permission Sets

Create

Save, Cancel.

Enter permission set information

Label: Providerconsumer
API Name: Providerconsumer
Description: (empty)
Session Activation Required: i

Select the type of users who will use this permission set

Who will use this permission set?
-Choose '--None--' if you plan to assign this permission set to multiple users with different user and permission set licenses.
-Choose a specific user license if you want users with only one license type to use this permission set.
-Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.

Not sure what a permission set license is? [Learn more here.](#)

License: **--None--**

Save, Cancel.

Cloud icon, Search, File icon, Chat icon, Google Sheets icon, WhatsApp icon, Spotify icon, Folder icon, Settings icon, Analytics icon.

ENG IN, 04:18 PM, 16-10-2023.



Search Setup



Setup

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SETUP

Permission Sets

Permission Set

Providerconsumer

[Video Tutorial](#) | [Help for this Page](#) ?

Find Settings...

Clone

Edit Properties

Manage Assignments

View Summary (Beta)

Permission Set Overview

Description

API Name

Providerconsumer

License

Namespace Prefix

Session Activation Required

Created By

[Selvaraja S](#), 16/10/2023, 8:17 pm

Permission Set Groups Added To

Last Modified By

[Selvaraja S](#), 16/10/2023, 8:18 pm

Apps

Assigned Apps

Settings that specify which apps are visible in the app menu

Assigned Connected Apps

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

Object Settings

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

App Permissions

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

Tabs | Salesforce Permission Sets | Salesforce

avseengineering-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0PS5j000008wSPw%3Fs%3DEntityPermissions

Cloud Search Setup

Setup Home Object Manager

perm

Users

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Custom Permissions

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

SETUP

Permission Sets

Providerconsumer

Video Tutorial | Help for this Page

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

Permission Set Overview > Object Settings

Object Settings

Object Name	Object API Name	Object Permissions	Total Fields	Tab Settings
Accounts	Account	No Access	40	--
AI Insight Reasons	AllInsightReason	No Access	--	--
AI Record Insights	AIRecordInsight	No Access	--	--
Alternative Payment Methods	AlternativePaymentMethod	No Access	27	--
API Anomaly Event Stores	ApiAnomalyEventStore	No Access	14	--
App Analytics Query Requests	AppAnalyticsQueryRequest	No Access	--	--
Application Usage Assignments	AppUsageAssignment	No Access	--	--
Appointment Categories	AppointmentCategory	No Access	3	--
Appointment Invitations	AppointmentInvitation	No Access	17	--
Appointment Invitees	AppointmentInvitee	--	4	--
Appointment Schedule Aggregates	AppointmentScheduleAggr	No Access	--	--
Appointment Schedule Logs	AppointmentScheduleLog	No Access	--	--
Appointment Topic Time Slots	AppointmentTopicTimeSlot	No Access	6	--
Asset Actions	AssetAction	No Access	30	--
Asset Action Sources	AssetActionSource	No Access	18	--
Asset Relationships	AssetRelationship	--	10	--

javascript:srcSelf("%2F0PS5j000008wSPw%3Fs%3DEntityPermissions%26o%3DAccount%26is...")

Search

File

Help

ENG IN

04:18 PM 16-10-2023

Tabs | Salesforce

Permission Sets | Salesforce

avseengineering-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0PS5j000008wSPw%3Fs%3DEntityPermissions%26o%3DAccount

Cloud icon

Search Setup

Setup Home Object Manager

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Users

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Custom Permissions

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

SETUP

Permission Sets

Providerconsumer

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

Video Tutorial | Help for this Page

Permission Set Overview > Object Settings Accounts

Accounts

Object Permissions

Permission Name	Enabled
Read	<input type="checkbox"/>
Create	<input type="checkbox"/>
Edit	<input type="checkbox"/>
Delete	<input 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 checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Account Number	AccountNumber	<input type="checkbox"/>	<input type="checkbox"/>
Account Owner	OwnerId	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Account Site	Site	<input type="checkbox"/>	<input type="checkbox"/>
Account Source	AccountSource	<input type="checkbox"/>	<input type="checkbox"/>

```
javascript:srcUp('%2F0PS5j000008wSPw%2Fe%3Fs%3DEntityPermissions%26o%3DAccount%...')
```

Windows Taskbar icons: File Explorer, Search, Task View, Microsoft Edge, WhatsApp, Spotify, File Explorer, Settings, Microsoft Store, Microsoft Teams

System tray: ENG IN, Volume, Date: 16-10-2023, Time: 04:18 PM

Salesforce | Tabs | Salesforce | Permission Sets | Salesforce

avseengineering-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0PS5j000008wSPw%2Fe%3Fs%3DEntityPermissions%26o%3DAccount

Cloud Search Setup Object Manager

Setup Home Object Manager

perm

Users

- Permission Set Groups
- Permission Sets**

Custom Code

Custom Permissions

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

SETUP

Permission Sets

Providerconsumer

Video Tutorial | Help for this Page

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

Permission Set Overview > Object Settings > Accounts

Accounts | Save | Cancel

Object Permissions

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

Field Permissions

Field Name	Field API Name	<input type="checkbox"/> Read Access	<input type="checkbox"/> Edit Access
Account Name	Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Account Number	AccountNumber	<input type="checkbox"/>	<input type="checkbox"/>
Account Owner	OwnerId	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Account Site	Site	<input type="checkbox"/>	<input type="checkbox"/>
Account Source	AccountSource	<input type="checkbox"/>	<input type="checkbox"/>

Windows Taskbar: Search, File Explorer, Task View, Taskbar Icons, System Tray: ENG IN, 04:18 PM, 16-10-2023

Salesforce | Tabs | Salesforce | Permission Sets | Salesforce

avseengineering-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0PS5j000008wSPw%2Fe%3Fs%3DEntityPermissions%26o%3DAccount

Cloud Search Setup Home Object Manager

perm

Users

- Permission Set Groups
- Permission Sets**

Custom Code

Custom Permissions

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

SETUP

Permission Sets

Providerconsumer

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

Video Tutorial | Help for this Page

Permission Set Overview > Object Settings > Accounts

Accounts

Save | Cancel

Object Permissions

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

Field Permissions

Field Name	Field API Name	<input type="checkbox"/> Read Access	<input type="checkbox"/> Edit Access
Account Name	Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Account Number	AccountNumber	<input type="checkbox"/>	<input type="checkbox"/>
Account Owner	OwnerId	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Account Site	Site	<input type="checkbox"/>	<input type="checkbox"/>
Account Source	AccountSource	<input type="checkbox"/>	<input type="checkbox"/>

Windows Taskbar: Search, File Explorer, Task View, Microsoft Edge, WhatsApp, Spotify, File Explorer, Settings, Task Manager, Microsoft Store

System tray: ENG IN, 04:18 PM, 16-10-2023

Salesforce | Tabs | Salesforce | Permission Sets | Salesforce

avseengineering-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0PS5j000008wSPw%3Fo%3DAccount%26s%3DEntityPermissions%26sfddFrameOrigin%3Dhttps%... ↗ ☆ ☰ ⚙️ 🌐

Cloud Search Setup

Setup Home Object Manager

perm

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Custom Permissions

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

SETUP

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Video Tutorial | Help for this Page

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

Permission Set Overview > Object Settings Accounts

Accounts

Edit

Object Permissions

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

Field Permissions

Field Name	Field API Name	Read Access	Edit Access
Account Name	Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Account Number	AccountNumber	<input type="checkbox"/>	<input type="checkbox"/>
Account Owner	OwnerId	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Account Site	Site	<input type="checkbox"/>	<input type="checkbox"/>
Account Source	AccountSource	<input type="checkbox"/>	<input type="checkbox"/>

Windows Taskbar

Search

File Explorer

Google Chrome

WhatsApp

Spotify

Folder

Settings

PowerShell

Microsoft Edge

System Icons

ENG IN 04:19 PM 16-10-2023

Tabs | Salesforce Permission Sets | Salesforce

avseengineering-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/0PS5j000008wSPw/PermissionSetAssignment/home

Setup Home Object Manager

Search Setup

perm

Users

- Permission Set Groups
- Permission Sets

Custom Code

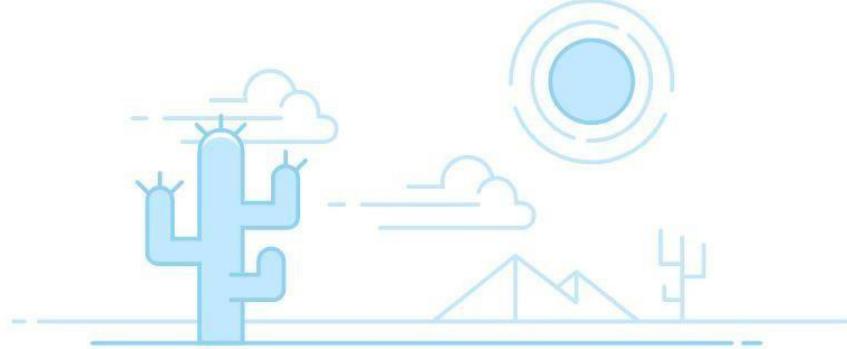
- Custom Permissions

... > SETUP > PERMISSION SET 'PROVIDERCONSUMER'

Providerconsumer

Current Assignments

Add Assignment



No assignments defined.

Cloud Search File System Settings Help

04:19 PM 16-10-2023 ENG IN



Search Setup



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Service

Embedded Service

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and Web User
Verification

User Interface

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Actions & Recommendations

App Menu

Custom Labels

Density Settings

Global Actions

Global Actions



... > PERMISSION SET 'PROVIDERCONSUMER' > MANAGE ASSIGNMENT EXPIRATION

Providerconsumer

Select Users to Assign



All Users ▾

1 item selected

Search this list...



	Full Name ↑	Ai...	Username	Role	A...	Profile	
<input type="checkbox"/>	Chatter Expert	Chatter	chatty.00d5j00000cisenean.g46uwwf5e1ew@chatter.sales...	<input checked="" type="checkbox"/>	Chatter Free User	<input type="button" value="▼"/>	
<input type="checkbox"/>	Consumer 2	c2	cons2@gmail.com	<input checked="" type="checkbox"/>	Marketing Tea...	<input type="button" value="▼"/>	
<input type="checkbox"/>	Integration User	integ	integration@00d5j00000cisenean.com	<input checked="" type="checkbox"/>	Analytics Cloud Integration Us...	<input type="button" value="▼"/>	
<input type="checkbox"/>	manager_01	m01	man01@gmail.com	<input checked="" type="checkbox"/>	Marketing Tea...	<input type="button" value="▼"/>	Manager
<input type="checkbox"/>	manager 02	m02	man02@gmail.com	<input checked="" type="checkbox"/>	Marketing Tea...	<input type="button" value="▼"/>	Solution Manager
<input checked="" type="checkbox"/>	Provider 2	p2	prov2@gmail.com	<input checked="" type="checkbox"/>	Marketing Tea...	<input type="button" value="▼"/>	Provider
<input type="checkbox"/>	Security User	sec	insightssecurity@00d5j00000cisenean.com	<input checked="" type="checkbox"/>	Analytics Cloud Security User	<input type="button" value="▼"/>	
<input type="checkbox"/>	Selvaraja S	SS	selvaraja@naanmudhalvan.com	<input checked="" type="checkbox"/>	System Administrator	<input type="button" value="▼"/>	

Cancel

Next



Search Setup



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Verification

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Action Link Templates

Actions & Recommendations

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Custom Labels

Density Settings

Global Actions

Global Actions



... > PERMISSION SET 'PROVIDERCONSUMER' > MANAGE ASSIGNMENT EXPIRATION

Providerconsumer

Select Users to Assign



All Users ▾

1 item selected

Search this list...



	Full Name ↑	Ai...	Username	Role	A...	Profile	
<input type="checkbox"/>	Chatter Expert	Chatter	chatty.00d5j00000cisenean.g46uwwf5e1ew@chatter.sales...	<input checked="" type="checkbox"/>	Chatter Free User	<input type="button" value="▼"/>	
<input type="checkbox"/>	Consumer 2	c2	cons2@gmail.com	<input checked="" type="checkbox"/>	Marketing Tea...	<input type="button" value="▼"/>	
<input type="checkbox"/>	Integration User	integ	integration@00d5j00000cisenean.com	<input checked="" type="checkbox"/>	Analytics Cloud Integration Us...	<input type="button" value="▼"/>	
<input type="checkbox"/>	manager_01	m01	man01@gmail.com	<input checked="" type="checkbox"/>	Marketing Tea...	<input type="button" value="▼"/>	Manager
<input type="checkbox"/>	manager 02	m02	man02@gmail.com	<input checked="" type="checkbox"/>	Marketing Tea...	<input type="button" value="▼"/>	Solution Manager
<input checked="" type="checkbox"/>	Provider 2	p2	prov2@gmail.com	<input checked="" type="checkbox"/>	Marketing Tea...	<input type="button" value="▼"/>	Provider
<input type="checkbox"/>	Security User	sec	insightssecurity@00d5j00000cisenean.com	<input checked="" type="checkbox"/>	Analytics Cloud Security User	<input type="button" value="▼"/>	
<input type="checkbox"/>	Selvaraja S	SS	selvaraja@naanmudhalvan.com	<input checked="" type="checkbox"/>	System Administrator	<input type="button" value="▼"/>	

Cancel

Next

Salesforce | Tabs | Salesforce | Permission Sets | Salesforce

avseengineering-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/0PS5j000008wSPw/PermissionSetAssignment/new

Cloud icon, Search Setup, Cloud settings, Home, Object Manager, Setup.

Search bar: permis

Users: Permission Set Groups, Permission Sets (selected), Custom Code, Custom Permissions.

No expiration date (radio button selected) vs Specify the expiration date (radio button). Time Zone dropdown: Select a time zone...

Selected Users table:

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

Cancel, Back, Assign buttons.

System tray icons: File, Search, Briefcase, Google Sheets, WhatsApp, Spotify, Folder, Settings, Microsoft Edge, Power BI.

System status: ENG IN, 04:19 PM, 16-10-2023.

Salesforce | Recently Viewed | Consumers | +

avseengineering-dev-ed.develop.lightning.force.com/lightning/o/Consumers_c/list?filterName=Recent

Cloud Search... Service Home Chatter Accounts Contacts Cases Reports Dashboards colleges Cdepartments Details Consumers Providers

Consumers Recently Viewed 0 items • Updated a few seconds ago Consumers Name List View Controls Change Owner

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

Search Engine Icons Taskbar ENG IN 04:20 PM 16-10-2023

Tabs | Salesforce Recently Viewed | Consumers |

avseengineering-dev-ed.develop.lightning.force.com/lightning/o/Consumers_c/list?filterName=Recent

Cloud Search... Service Home Chatter Accounts Contacts Cases Reports Dashboards colleges Cdepartments Details Consumers Providers

Consumers Recently Viewed ▾

0 items • Updated a few seconds ago

Consumers Name

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

New Import Change Owner

LIST VIEW CONTROLS

- New
- Clone
- Rename
- Sharing Settings
- Show List Filters
- Select Fields to Display
- Delete
- Reset Column Widths

javascript:void(0)

Search

04:20 PM 16-10-2023

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.

Solution:

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

- Setup** tab is selected in the top navigation bar.
- Object Manager** is selected in the sub-navigation bar.
- Management** is the current object being edited.
- Custom Object Definition Edit** screen is displayed.
- Custom Object Information** section:
 - Label: Management (Example: Account)
 - Plural Label: Managements (Example: Accounts)
 - Starts with vowel sound:
- Object Name**: Management (Example: Account)
- Description**: A large text input field.
- 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** section at the bottom.

The browser address bar shows the URL: `avseengineering-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01I5j000003DNHY/edit?address=%2F01I5j000003DNHY%2Fe%3FretURL%3D%252Fsetup%252Fobject%2...`

Project - Student Online Job Portal Tabs | Salesforce

avseengineering-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2F01r5j000001fwAJ%2Fe%3FretURL%3D%252Fsetup%252Fui%252Fcustomtabs.jsp%253Fset...

Search Setup

Setup Home Object Manager

tabs

User Interface

Rename Tabs and Labels

Tabs

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

SETUP
Tabs

Edit Custom Object Tab
Managements

Fill in the fields below to define the custom tab.

Custom Tab Definition Edit

Custom Object Tab Information

Tab Label: Managements
Object: Management
Tab Style: Thermometer

(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:

Save Cancel

Windows Taskbar icons: Search, File Explorer, Google Chrome, WhatsApp, Spotify, File Manager, Microsoft Edge

System tray: ENG IN, 03:35 PM, 19-10-2023

Project - Student Online Job Portal Profiles | Salesforce

avseengineering-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/home

Search Setup

Setup Home Object Manager

pro

Hyperforce Assistant

Users Profiles

Data Mass Transfer Approval Requests

Feature Settings Data.com Prospector Preferences Prospector Users Functions

Marketing Lead Processes

Sales Products Asset Settings Product Schedules Settings Product Settings

SETUP Profiles

Help for this Page

All Profiles Edit | Delete | Create New View

New Profile

Action	Profile Name	User License	Custom
Edit Clone	Analytics Cloud Integration User	Analytics Cloud Integration User	<input type="checkbox"/>
Edit Clone	Analytics Cloud Security User	Analytics Cloud Integration User	<input type="checkbox"/>
Edit Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
Edit Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
Edit Del ...	B2B Reordering Portal Buyer Profile	External Apps Login	<input checked="" type="checkbox"/>
Edit Clone	Chatter External User	Chatter External	<input type="checkbox"/>
Edit Clone	Chatter Free User	Chatter Free	<input type="checkbox"/>
Edit Clone	Chatter Moderator User	Chatter Free	<input type="checkbox"/>
Edit Del ...	Consumer	Salesforce Platform	<input checked="" type="checkbox"/>
Edit Clone	Contract Manager	Salesforce	<input type="checkbox"/>
Edit Clone	Cross Org Data Proxy User	XOrg Proxy User	<input type="checkbox"/>
Edit Del ...	Custom: Marketing Profile	Salesforce	<input checked="" type="checkbox"/>
Edit Del ...	Custom: Sales Profile	Salesforce	<input checked="" type="checkbox"/>
Edit Del ...	Custom: Support Profile	Salesforce	<input checked="" type="checkbox"/>

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

1-25 of 43 | 0 Selected | Previous | Next | Page 1 of 2

Windows Search Google Spotify File App

ENG IN 03:36 PM 19-10-2023

Project - Student Online Job Portal Profiles | Salesforce

avseengineering-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/home

Search Setup

Setup Home Object Manager

pro

Hyperforce Assistant

Users Profiles

Data Mass Transfer Approval Requests

Feature Settings Data.com Prospector Preferences Prospector Users Functions Marketing Lead Processes Sales Products Asset Settings Product Schedules Settings Product Settings

SETUP Profiles

Help for this Page

All Profiles Edit | Delete | Create New View

New Profile

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

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

Windows Search Google Chrome WhatsApp Spotify File Explorer Microsoft Edge

ENG IN 03:36 PM 19-10-2023

Project - Student Online Job Portal Profiles | Salesforce

avseengineering-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F_ui%2Fperms%2Fui%2Fprofile%2FProfileClone%2Fe%3Fid%3D00e5j000005BvrU%26...

Search Setup

Setup Home Object Manager

pro

Hyperforce Assistant

Users

Profiles

Data

Mass Transfer Approval Requests

Feature Settings

Data.com

Prospector Preferences

Prospector Users

Functions

Marketing

Lead Processes

Sales

Products

Asset Settings

Product Schedules

Settings

Product Settings

SETUP Profiles

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

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

Save Cancel

Help for this Page ?

Windows Search Bar

Search

File Explorer

Google Chrome

WhatsApp

Spotify

Folder

ENG IN 03:36 PM 19-10-2023

Project - Student Online Job Portal Users | Salesforce

avseengineering-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F0055j00000AkmeE%2Fe%3FisUserEntityOverride%3D1%26retURL%3D%252F005%253Fis...

Setup Home Object Manager

Search Setup

User Edit Manager 1

Help for this Page ?

User Edit

Save Save & New Cancel

General Information

= Required Information

First Name	Manager	Role	Marketing Team
Last Name	1	User License	Salesforce Platform
Alias	m1	Profile	Manager
Email	manager001@gmail.com	Active	<input checked="" type="checkbox"/>
Username	managerm01@gmail.com	Marketing User	<input type="checkbox"/>
Nickname	User169752680832999218	Offline User	<input type="checkbox"/>
Title		Knowledge User	<input type="checkbox"/>
Company		Flow User	<input type="checkbox"/>
Department		Service Cloud User	<input type="checkbox"/>
Division		Site.com Contributor User	<input type="checkbox"/>
		Site.com Publisher User	<input type="checkbox"/>
		WDC User	<input type="checkbox"/>
		Data.com User Type	--None--
		Data.com Monthly Addition Limit	300
		Accessibility Mode (Classic Only)	<input type="checkbox"/>

Action Link Templates

Windows Search Google Chrome WhatsApp Spotify LinkedIn 03:38 PM 19-10-2023 ENG IN

Project - Student Online Job Portal Users | Salesforce

avseengineering-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F0055j00000AkmiV%2Fe%3FisUserEntityOverride%3D1%26retURL%3D%252F005%253Fis...

Setup Home Object Manager

Search Setup

User Edit Manager 2

Help for this Page

User Edit

Save Save & New Cancel

General Information

= Required Information

Field	Value
First Name	Manager
Last Name	2
Alias	m2
Email	manager002@gmail.com
Username	managerme2@gmail.com
Nickname	User169752701895617292
Title	
Company	
Department	
Division	
Role	Marketing Team
User License	Salesforce
Profile	Solution Manager
Active	<input checked="" type="checkbox"/>
Marketing User	<input type="checkbox"/>
Offline User	<input type="checkbox"/>
Knowledge User	<input type="checkbox"/>
Flow User	<input type="checkbox"/>
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"/>
Data.com User Type	--None--
Data.com Monthly Addition Limit	300
Accessibility Mode (Classic Only)	<input type="checkbox"/>

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 Verification

User Interface

Action Link Templates

Windows Search Bar

Google Chrome

WhatsApp

Spotify

Microsoft Edge

System Icons: Battery, Volume, Network, Date/Time



Search Setup



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



SETUP

Users

All Users

Help for this Page

On this page you can create, view, and manage users.

To get more licenses, use the Your Account app. [Let's Go](#)

View: [All Users](#) [Edit](#) | [Create New View](#)

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

[New User](#) [Reset Password\(s\)](#) [Add Multiple Users](#)

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	User_Security	sec	insightssecurity@00d5j00000cisenean.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User
Edit	User_Integration	integ	integration@00d5j00000cisenean.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
Edit	S_Selvaraja	SS	selvaraja@naanmudhalvan.com		<input checked="" type="checkbox"/>	System Administrator
Edit	Chatter_Expert	Chatter	chatty.00d5j00000cisenean.g46uvwxyzew@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
Edit	2_Provider	p2	prov2@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Provider
Edit	2_Consumer	c2	cons2@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Consumer
Edit	02_manager	m02	man02@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Solution Manager
Edit	01_manager	m01	man01@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Manager

Project - Student Online Job Portal Permission Sets | Salesforce

avseengineering-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2Fudd%2FPermissionSet%2FnewPermissionSet.apexp

Search Setup

Setup Home Service Setup Assistant Commerce Setup Center Multi-Factor Authentication Assistant Hyperforce Assistant Release Updates Lightning Experience Transition Assistant Salesforce Mobile App Lightning Usage Optimizer

ADMINISTRATION

Users

- Permission Set Groups
- Permission Sets**
- Profiles
- Public Groups
- Queues

Permission Sets

CREATE

Enter permission set information

Label: Manager12
API Name: Manager12
Description:
Session Activation Required:

Select the type of users who will use this permission set

Who will use this permission set?

- Choose '--None--' if you plan to assign this permission set to multiple users with different user and permission set licenses.
- Choose a specific user license if you want users with only one license type to use this permission set.
- Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.

Not sure what a permission set license is? [Learn more here.](#)

License: --None--

Save Cancel

Windows Search Bar

System Icons: File Explorer, Google Chrome, WhatsApp, Spotify

System Status: ENG IN, 19-10-2023, 03:40 PM



Search Setup



Setup

Home

Object Manager

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



SETUP

Permission Sets

[Video Tutorial](#) | [Help for this Page](#)

Permission Set
Manager12

Find Settings...

Clone

Edit Properties

Manage Assignments

View Summary (Beta)

Permission Set Overview

Description	API Name	Namespace Prefix
-------------	----------	------------------

License

Manager12

Created By

[Selvaraja S](#), 17/10/2023, 12:55 pm

Last Modified By

[Selvaraja S](#), 17/10/2023, 12:56 pm

Session Activation Required

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 access objects and fields, and settings such as tab availability

Project - Student Online Job Portal Permission Sets | Salesforce

avseengineering-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2F0PS5j000008xP6E%2Fe%3Fs%3DEntityPermissions%26o%3DAccount

Setup Home Service Setup Assistant Commerce Setup Center Multi-Factor Authentication Assistant Hyperforce Assistant Release Updates Lightning Experience Transition Assistant Salesforce Mobile App Lightning Usage Optimizer

ADMINISTRATION Users

Permission Set Groups **Permission Sets**

Profiles Public Groups Queues

Search Setup

Quick Find

Setup Sets

Permission Sets

Manager12

Video Tutorial | Help for this Page

Find Settings... | Clone | 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	<input type="checkbox"/> Read Access	<input type="checkbox"/> Edit Access
Account Name	Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Account Number	AccountNumber	<input type="checkbox"/>	<input type="checkbox"/>
Account Owner	OwnerId	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Account Site	Site	<input type="checkbox"/>	<input type="checkbox"/>

Windows Search Task View Spotify Microsoft Edge

ENG IN 03:42 PM 19-10-2023

Project - Student Online Job Portal Permission Sets | Salesforce

avseengineering-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/0PS5j000008xP6E/PermissionSetAssignment/home

Setup Home Service Setup Assistant Commerce Setup Center Multi-Factor Authentication Assistant Hyperforce Assistant Release Updates Lightning Experience Transition Assistant Salesforce Mobile App Lightning Usage Optimizer

ADMINISTRATION

Users

- Permission Set Groups
- Permission Sets**
- Profiles
- Public Groups
- Queues

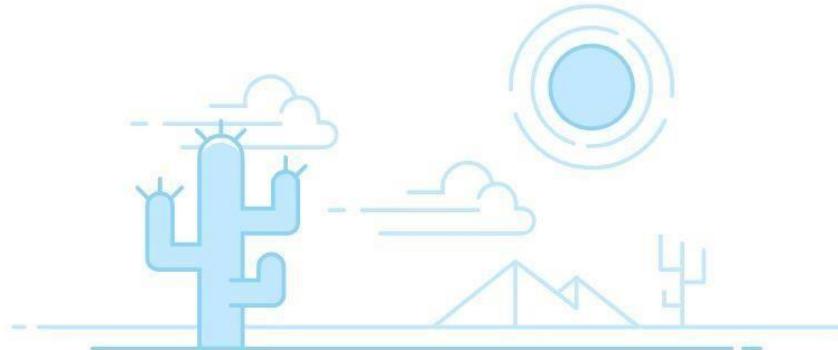
Search Setup

Manager12

... > SETUP > PERMISSION SET 'MANAGER12'

Current Assignments

Add Assignment



No assignments defined.

Windows Search Bar Google Chrome WhatsApp (1) Spotify File Explorer

ENG IN 03:44 PM 19-10-2023



Search Setup



Setup

Home

Object Manager

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 Settings

Scheduling Policies

Skills

Process Automation

Automation Home (Beta)

Flows

Migrate to Flow

Next Best Action

Paused And Failed Flow



... > PERMISSION SET 'MANAGER12' > MANAGE ASSIGNMENT EXPIRATION

Manager12

Select Users to Assign

**All Users** ▾

1 item selected

Search this list...



Full Name ↑	AI...	Username	Role	A...	Profile
<input type="checkbox"/> Chatter Expert	Chatter	chatty.00d5j00000cisenean.g46uwwf5e1ew@chatter.sales...	<input checked="" type="checkbox"/>	Marketing Tea...	Chatter Free User
<input type="checkbox"/> Consumer 2	c2	cons2@gmail.com	<input checked="" type="checkbox"/>	Marketing Tea...	Consumer
<input type="checkbox"/> Integration User	integ	integration@00d5j00000cisenean.com	<input checked="" type="checkbox"/>	Marketing Tea...	Analytics Cloud Integration Us...
<input checked="" type="checkbox"/> manager 01	m01	man01@gmail.com	<input checked="" type="checkbox"/>	Marketing Tea...	Manager
<input type="checkbox"/> manager 02	m02	man02@gmail.com	<input checked="" type="checkbox"/>	Marketing Tea...	Solution Manager
<input type="checkbox"/> Provider 2	p2	prov2@gmail.com	<input checked="" type="checkbox"/>	Marketing Tea...	Provider
<input type="checkbox"/> Security User	sec	insightssecurity@00d5j00000cisenean.com	<input checked="" type="checkbox"/>	Marketing Tea...	Analytics Cloud Security User
<input type="checkbox"/> Selvaraja S	SS	selvaraja@naanmudhalvan.com	<input checked="" type="checkbox"/>	Marketing Tea...	System Administrator

Cancel

Next

Project - Student Online Job Portal Permission Sets | Salesforce

avseengineering-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/0PS5j000008xP6E/PermissionSetAssignment/new

Search Setup

Setup Home Service Setup Assistant Commerce Setup Center Multi-Factor Authentication Assistant Hyperforce Assistant Release Updates Lightning Experience Transition Assistant Salesforce Mobile App Lightning Usage Optimizer

ADMINISTRATION

Users

- Permission Set Groups
- Permission Sets**
- Profiles
- Public Groups
- Queues

No expiration date Specify the expiration date

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

Windows Taskbar: Search, File Explorer, Google Chrome, WhatsApp, Spotify, File Manager

System Tray: ENG IN, 03:44 PM, 19-10-2023

Project - Student Online Job Portal Permission Sets | Salesforce

avseengineering-dev-ed.develop.lightning.force.com/one/one.app#eyJjb21wb25lbnREZWYiOjzZXR1cF9wbGF0Zm9ybV9wZXJtcpw2FSZXN1bHRQYWdliwiYXR0cmliidXRlcyl6e30slnN0YXRljp7...

Search Setup

Setup Home Service Setup Assistant Commerce Setup Center Multi-Factor Authentication Assistant Hyperforce Assistant Release Updates Lightning Experience Transition Assistant Salesforce Mobile App Lightning Usage Optimizer

ADMINISTRATION

Users

- Permission Set Groups
- Permission Sets
- Profiles
- Public Groups
- Queues

Manager12

... > PERMISSION SET 'MANAGER12'

1 assignments were successful.

Assignment Summary

Full Name	User License	Expires On	Time Zone	Status
Manager 1	Salesforce Platform			<input checked="" type="checkbox"/> Success

Done

Windows Taskbar: Search, File Explorer, Google Chrome, WhatsApp, Spotify, File Icons

System Tray: ENG IN, 03:44 PM, 19-10-2023

Project - Student Online Job Portal Permission Sets | Salesforce

avseengineering-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/0PS5j000008xP6E/PermissionSetAssignment/home

Search Setup

Setup Home

Service Setup Assistant

Commerce Setup Center

Multi-Factor Authentication Assistant

Hyperforce Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

ADMINISTRATION

Users

- Permission Set Groups
- Permission Sets**
- Profiles
- Public Groups
- Queues

Manager12

... > SETUP > PERMISSION SET 'MANAGER12'

Current Assignments

<input type="checkbox"/> Full Name ↑	Active	Role	Profile	User License	Expires On
<input type="checkbox"/> Manager 1	✓	Marketing Team	Manager	Salesforce Platform	

Quick Find

Add Assignment

Windows Taskbar: Search, File Explorer, Google Chrome, WhatsApp, Spotify, File Icons

System Tray: ENG IN, Wi-Fi, Volume, Battery, 03:44 PM, 19-10-2023

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

Solution:

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

- Tab Bar:** C Tutorial, New Custom Object | Salesforce, How To Customize Your Tabs in ..., +
- Header:** Search Setup, Cloud icon, Home, Object Manager
- Section:** SETUP - New Custom Object
- Form:** Custom Object Definition Edit
- Buttons:** Save, Save & New, Cancel
- Custom Object Information:**
 - Label: Details (Example: Account)
 - Plural Label: Details (Example: Accounts)
 - Starts with vowel sound:
- Object Name:** Object Name: Details (Example: Account)
- Description:** A large text area for description.
- Context-Sensitive Help Setting:**
 - Open the standard Salesforce.com Help & Training window
 - Open a window using a Visualforce page
- Content Name:** None
- Enter Record Name Label and Format:**

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

 - Record Name: Details Name (Example: Account Name)
 - Data Type: Text

At the bottom, there are system status icons and a footer bar with the date 16-10-2023 and time 02:18 PM.

C Tutorial | New Custom Object | Salesforce

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

Cloud Search Setup Object Manager

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 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

Waiting for avs... Card Name Label and Format

Windows Search Task View Google Chrome WhatsApp Spotify

ENG IN 02:35 PM 16-10-2023

C Tutorial | Details | Salesforce

avseengineering-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I5j000003DCnf/FieldsAndRelationships/new

Setup Home Object Manager

SETUP > OBJECT MANAGER Details

Details

Help for this Page ?

Step 2 of 4

Previous Next Cancel

New Custom Field

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__mdt RecordAPIName Field__c

Previous Next Cancel

ENG IN 02:37 PM 16-10-2023

C Tutorial | Details | Salesforce

avseengineering-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I5j000003DCnf/FieldsAndRelationships/new

Cloud Search Setup 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

New Custom Field

Step 2. Enter the details Step 2 of 4

Previous Next Cancel

Field Label: DOB

Field Name: DOB

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__mdt RecordAPIName Field__c

ENG IN 02:37 PM 16-10-2023

C Tutorial | Details | Salesforce

avseengineering-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I5j000003DCnf/FieldsAndRelationships/new

Cloud Search Setup 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

New Custom Field

Step 2. Enter the details Step 2 of 4

Field Label: Gender

Values:

- Use global picklist value set
- Enter values, with each value separated by a new line

-None--

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:

Description:

Help Text:

Previous Next Cancel

ENG IN 02:38 PM 16-10-2023

C Tutorial | Details | Salesforce

avseengineering-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I5j000003DCnf/FieldsAndRelationships/new

Setup Home Object Manager

SETUP > OBJECT MANAGER Details

Details

Help for this Page ?

Step 2 of 4

Previous Next Cancel

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:

Windows Taskbar icons: Search, File Explorer, Google Chrome, WhatsApp, Spotify

ENG IN 02:38 PM 16-10-2023

New Custom Field

Step 2. Enter the 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

C Tutorial | Details | Salesforce

avseengineering-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I5j000003DCnf/FieldsAndRelationships/view

Setup Home Object Manager

SETUP > OBJECT MANAGER Details

Fields & Relationships

8 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
DOB	DOB_c	Date		
Email	Email_c	Email		
Gender	Gender_c	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name	Text(80)		✓
Owner	OwnerId	Lookup(User,Group)		✓
Phone	Phone_c	Phone		

Quick Find New Deleted Fields Field Dependencies Set History Tracking

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

Windows Search Task View Google Chrome WhatsApp Spotify

ENG IN 02:39 PM 16-10-2023

Salesforce Tabs | C Tutorial

https://avseengineering-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/home

Cloud Search Bar: Search Setup

Setup Home Object Manager

Custom Tabs

Custom Object Tabs

Action	Label	Tab Style	Description
Edit Del	Cdepartments	Lightning	
Edit Del	colleges	Jewel	

Web Tabs

No Web Tabs have been defined.

Visualforce Tabs

No Visualforce Tabs have been defined.

Lightning Component Tabs

No Lightning component tabs have been defined.

Help for this Page

Didnt find what you're looking for?
Try using Global Search.

https://avseengineering-dev-ed.develop.lightning.force.com/one/one.app#/setup/CustomTabs/home

Windows Taskbar: Search, File Explorer, Google Chrome, WhatsApp, Spotify

System Tray: ENG IN, 02:39 PM, 16-10-2023

C Tutorial | Tabs | Salesforce

avseengineering-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2FobjectCustomTabWizard.jsp%3FretURL%3D%252Fsetup%252Fui%252Fcustomt...

Cloud Search Setup Home Object Manager

tab

Feature Settings Analytics Tableau Tableau Embedding User Interface Loaded Console Tab Limit Rename Tabs and Labels Tabs

New Custom Object Tab

Help for this Page

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: Details

Tab Style: Pencil

(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

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



Search



02:40 PM
16-10-2023

C Tutorial | Tabs | Salesforce

avseengineering-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2FobjectCustomTabWizard.jsp%3FretURL%3D%252Fsetup%252Fui%252Fcustomt...

Cloud Search Setup Home Object Manager

tab

Feature Settings

- Analytics
- Tableau
 - Tableau Embedding
- User Interface
 - Loaded Console Tab Limit
 - Rename Tabs and Labels
 - Tabs

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

SETUP Tabs

Tab Name	Status
Community (standard__Community)	<input checked="" type="checkbox"/>
Site.com (standard__Sites)	<input checked="" type="checkbox"/>
Salesforce Chatter (standard__Chatter)	<input checked="" type="checkbox"/>
Content (standard__Content)	<input checked="" type="checkbox"/>
Analytics Studio (standard__Insights)	<input checked="" type="checkbox"/>
Sales Console (standard__LightningSalesConsole)	<input checked="" type="checkbox"/>
Service Console (standard__LightningService)	<input checked="" type="checkbox"/>
Sales (standard__LightningSales)	<input checked="" type="checkbox"/>
Lightning Usage App (standard__LightningInstrumentation)	<input checked="" type="checkbox"/>
Digital Experiences (standard__SalesforceCMS)	<input checked="" type="checkbox"/>
Queue Management (standard__QueueManagement)	<input checked="" type="checkbox"/>
Data Manager (standard__DataManager)	<input checked="" type="checkbox"/>
Subscription Management (standard__RevenueCloudConsole)	<input checked="" type="checkbox"/>
Salesforce Scheduler Setup (standard__LightningScheduler)	<input checked="" type="checkbox"/>
Bolt Solutions (standard__LightningBolt)	<input checked="" type="checkbox"/>
Assignment (Assignment)	<input checked="" type="checkbox"/>

Append tab to users' existing personal customizations

Previous Save Cancel

Windows Search Task View Google Chrome WhatsApp Spotify

ENG IN 02:40 PM 16-10-2023

Salesforce Tabs | C Tutorial

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

Cloud Search Bar: Search Setup

Setup Home Object Manager

Search bar: tab

Feature Settings

Analytics

Tableau

Tableau Embedding

User Interface

Loaded Console Tab Limit

Rename Tabs and Labels

Tabs

Help for this Page

Custom Tabs

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

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

Custom Object Tabs

Action	Label	Tab Style	Description
Edit Del	Cdepartments	Lightning	
Edit Del	colleges	Jewel	
Edit Del	Details	Pencil	

Web Tabs

No Web Tabs have been defined

Visualforce Tabs

No Visualforce Tabs have been defined

Lightning Component Tabs

No Lightning component tabs have been defined

Windows Taskbar: Search, File Explorer, Google Chrome, WhatsApp, Spotify

System Status: ENG IN, 02:40 PM, 16-10-2023

C Tutorial | Recently Viewed | colleges | Sales | Home | Salesforce

avseengineering-dev-ed.develop.lightning.force.com/lightning/setup/SetupOneHome/home

Cloud icon, Search Setup, Home icon, Setup tab, Home, Object Manager, Create button.

Search bar: flo

Apps:

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

SETUP Home

Get Started with Einstein Bots: Launch an AI-powered bot to automate your digital connections. Get Started button.

Mobile Publisher: Use the Mobile Publisher to create your own branded mobile app. Learn More button.

Real-time Collaborative Docs: Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce. Get Started button.

Most Recently Used: 10 items

NAME	TYPE	OBJECT
Details	Custom Tab Definition	Details
Email	Custom Field Definition	Details

Windows icon, Search bar, Taskbar icons: File Explorer, Google Chrome, WhatsApp, Spotify, Network icon, ENG IN, 02:43 PM, 16-10-2023.

C Tutorial | Recently Viewed | colleges | Sales | Flows | Salesforce | Flow Builder

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

Flow Builder

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

more on the AppExchange

javascript:void(0)

Search

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Flow Builder

Select Elements | Auto-Layout | Run | Debug | Activate | Save As | Save

Screen Flow Start

Add Element

Search...

Interaction

- Screen
- Action
- Subflow

Logic

- Assignment
- Decision

End

- | +

The screenshot shows the Salesforce Flow Builder interface. At the top, there are tabs for 'C Tutorial', 'Recently Viewed', 'Flows', and 'Flow Builder'. Below the tabs, the URL is 'avseengineering-dev-ed.lightning.force.com/builder_platform_interaction/flowBuilder.app'. The main title is 'Flow Builder'. A toolbar at the top right includes 'Select Elements', 'Auto-Layout', 'Run', 'Debug', 'Activate', 'Save As', and 'Save'. The main area displays a flow diagram with a green start node labeled 'Screen Flow Start' connected to a blue end node labeled 'End'. Between them is a white rounded rectangle labeled 'Add Element' containing a search bar and a list of elements categorized into 'Interaction' and 'Logic'. The 'Interaction' category includes 'Screen', 'Action', and 'Subflow'. The 'Logic' category includes 'Assignment' and 'Decision'. At the bottom left, there are zoom controls (-, +, x). The bottom navigation bar includes icons for Windows, Search, File, Google Chrome, WhatsApp, and Spotify, along with system status indicators for battery, signal, and volume.

C Tutorial | Recently Viewed | colleges | Sales | Flows | Salesforce | Flow Builder

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

Flow Builder

New Screen

Components Fields

tex

* Input (2)

- Long Text Area
- Text

* Display (1)

- Display Text

[Flow Label]

name

Pause Previous Finish

Screen Properties

* Label Details

* API Name Details

Description

> Configure Header

> Configure Footer

Cancel Done

Get more on the AppExchange

- +

Search

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Flow Builder

New Screen

Components Fields

pi

Input (5)

- Dependent Picklists
- Multi-Select Picklist
- Order Management Enter Shi...
- Order Management Select Shi...
- Picklist

Get more on the AppExchange

name

Phone

Email

you@example.com

Gender

--None--

Picklist

Pause

Previous

Finish

Auto-Layout

Run

Debug

Activate

Save As

Save

← Picklist

Label

Gender

* API Name

Gender

Require

Data Type

Text

Configure Choices

Let Users Select Multiple Options

Yes

No

Cancel

Done

-

Search

Google Chrome

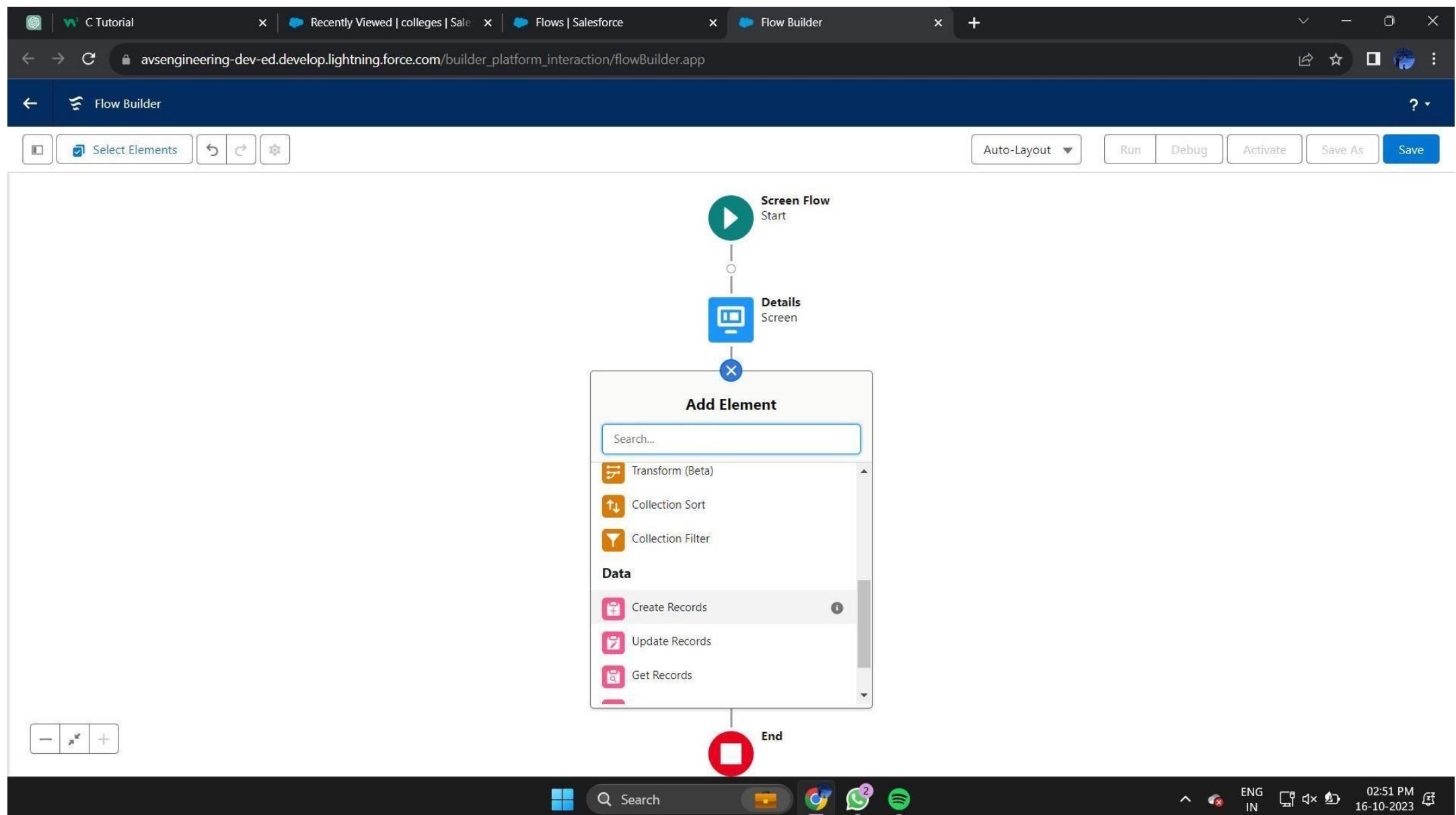
WhatsApp

Spotify

ENG IN

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Flow Builder

Auto-Layout Run Debug Activate Save As Save

Screen Flow Start

Details Screen

Details1 Create Records

End

How to Set the Record Fields

- Use all values from a record
- Use separate resources, and literal values

Create a Record of This Object

* Object Details

Set Field Values for the Details

Field	Value
Name	A_a name X
Email_c	A_a Email > Value X
Phone_c	A_a Phone > Value X
Gender_c	A_a Gender X
DOB_c	{!Date_of_birth}

+ Add Field

Manually assign variables

Search

02:52 PM 16-10-2023

C Tutorial | Recently Viewed | colleges | Sales | Flows | Salesforce | Details - V1

avseengineering-dev-ed.lightning.force.com/builder_platform_interaction/flowBuilder.app?flowId=3015j0000025kanAAA

Flow Builder | Details - V1 | ?

Select Elements | Auto-Layout | Version 1: Inactive—Last modified a few seconds ago | Run | Debug | Activate | Save As | Save

Screen Flow Start → Details Screen → Details1 Create Records → End

How to Set the Record Fields
 Use all values from a record
 Use separate resources, and literal values

Create a Record of This Object
* Object: Details

Set Field Values for the Details

Field	Value
Name	A_a name X
Email_c	A_a Email > Value X
Phone_c	A_a Phone > Value X
Gender_c	A_a Gender X
DOB_c	Date_of_birth X

+ Add Field | Manually assign variables

```
graph TD; Start((Screen Flow Start)) --> Details[Details Screen]; Details --> Details1[Details1 Create Records]; Details1 --> End((End))
```

Auto-Layout | Version 1: Inactive—Last modified a few seconds ago | Run | Debug | Activate | Save As | Save

How to Set the Record Fields
 Use all values from a record
 Use separate resources, and literal values

Create a Record of This Object
* Object: Details

Set Field Values for the Details

Field	Value
Name	A_a name X
Email_c	A_a Email > Value X
Phone_c	A_a Phone > Value X
Gender_c	A_a Gender X
DOB_c	Date_of_birth X

+ Add Field | Manually assign variables

Search | Microsoft Edge | Google Chrome | WhatsApp | Spotify

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Details

Name

Selvaraja S

Phone

8778454367

Email

selvaraja1652003@gmail.com

Gender

Male



DOB

16-May-2003



Next



Search...



Service

Home

Chatter

Accounts

Contacts

Cases

Reports

Dashboards

colleges

departments

Details



Detail

Selvaraja S

New Contact

Edit

New Opportunity



Related

Details

Name

Selvaraja S

Owner

Selvaraja S



Email

selvaraja1652003@gmail.com



Phone

8778454367



DOB

16/05/2003



Gender

Male



Created By

Selvaraja S, 16/10/2023, 3:35 pm

Last Modified By

Selvaraja S, 16/10/2023, 3:35 pm

