

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 also create a Roll Up Summary Field to Calculate total number of records.

Salesforce Setup - New Custom Object | Sales

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

Setup Home Object Manager

Search Setup

New Custom Object

Custom Object Definition Edit

Save Save & New Cancel

Custom Object Information

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

Label: College Example: Account

Plural Label: Colleges Example: Accounts

Starts with vowel sound:

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

Object Name: College Example: Account

Description:

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

Content Name:

Enter Record Name Label and Format

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

Record Name: College Name Example: Account Name

Help for this Page

WhatsApp Gmail YouTube Maps Global NetAcad Edvibe Interactive...

Salesforce Setup - New Custom Object | Sales

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

Setup Home Object Manager

Search Setup

New Custom Object

Custom Object Definition Edit

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Custom Object Information

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

Label: Department Example: Account

Plural Label: Departments Example: Accounts

Starts with vowel sound:

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

Object Name: Department Example: Account

Description:

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

Content Name:

Enter Record Name Label and Format

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

Record Name: Department Name Example: Account Name

Help for this Page

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Screenshot of the Salesforce Object Manager setup page for adding custom related lists.

Object Manager

Step 4: Add custom related lists

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

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

Buttons: Previous, Save & New, Save, Cancel

Screenshot of the Salesforce Tabs setup page.

Tabs

Custom Tabs

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

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

Custom Object Tabs

| Action | Label | Tab Style | Description |
|------------|--------------------|----------------|-------------|
| Edit Del | Colleges | Building Block | |
| Edit Del | Departments | Check card | |
| Edit Del | Executives | Diamond | |
| Edit Del | Executive-products | Lightning | |
| Edit Del | Institutes | COTDWP | |
| Edit Del | our customers | Bottle | |
| Edit Del | Procedures | Apexlet | |
| Edit Del | retailers | Highway Sign | |
| Edit Del | Skinner products | Star | |
| Edit Del | Students | Triangle | |

Web Tabs

| Action | Label | Description |
|--------|---------------|-------------|
| New | What is This? | |

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

The left sidebar shows navigation links: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, Scoping Rules, Triggers, and Flow Triggers.

The main content area displays a list of field types:

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

Each field type has a brief description:

- Currency: Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
- Date: Allows users to enter a date or pick a date from a popup calendar.
- DateTime: Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the DateTime field.
- Text: Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
- Geolocation: Allows users to define locations, includes latitude and longitude components, and can be used to calculate distance.
- Number: Allows users to enter any number. Leading zeros are removed.
- Percent: Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.
- Phone: Allows users to enter any phone number. Automatically formats it as a phone number.
- Picklist: Allows users to select a value from a list you define.
- Postal (Multi-Select): Allows users to select multiple values from a list you define.
- Ref: Allows users to enter any combination of letters and numbers.
- Text Area (Long): Allows users to enter up to 255 characters on separate lines.
- Text Area (Rich): Allows users to enter up to 131,072 characters on separate lines.
- Text (Encrypted) 1: Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.
- Time: Allows users to enter a local time. For example, '2:40 PM', '14:40', '14:40:00', and '14:40:50:00' are all valid times for this field.
- URL: Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

Buttons at the bottom right: Next, Cancel.

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

The left sidebar shows navigation links: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, Scoping Rules, Triggers, and Flow Triggers.

The main content area shows 'Step 2: Enter the details' of a new custom field named 'Dept_mail'. The field is labeled 'Dept_mail'.

Form fields include:

- Field Label: Dept_mail
- Field Name: Dept_mail
- Description: (empty)
- Help Text: (empty)
- Required: Always require a value in this field in order to save a record.
- Unique: Do not allow duplicate values.
- External ID: Set this field as the unique record identifier from an external system.
- Auto add to custom report type: Add this field to existing custom report types that contain this entity.
- Default Value: Show Format Editor

A note at the bottom states: Use Picklist values. Enclose text and picklist values in double quotes ("PICKLIST"). Include numbers without quotes -123. When entering as decimals, for lists and integers data (values) in the standard format (.0000) * 12.34 reference a field from a Custom Metadata type record like: \$CustomMetadataType__r.Id--recordName__r.Field__c

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

Screenshot of the Salesforce Object Manager for the Department object.

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

The main content area displays the "Fields & Relationships" section. A list of field types is shown on the left, with "Phone" selected. Descriptions for each field type are provided on the right.

- Currency: Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
- Date: Allows users to enter a date or pick a date from a pop-up calendar.
- DateTime: Allows users to enter a date and time, or pick a date from a pop-up calendar. When users click a date in the pop-up, that date and the current time are entered into the DateTime field.
- Email: Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
- Geolocation: Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
- Number: Allows users to enter any number. Leading zeros are removed.
- Percent: Allows users to enter any percentage number, for example, "10" and automatically adds the percent sign to the number.
- Phone: Allows users to enter any phone number. Automatically formats it as a phone number.
- Picklist: Allows users to select a value from a list you define.
- Picklist (Multi-Select): Allows users to select multiple values from a list you define.
- Text:

 - Text Area: Allows users to enter up to 255 characters on separate lines.
 - Text Area (Long): Allows users to enter up to 32,072 characters on separate lines.
 - Text Area (Rich): Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.

- Text (Encrypted): Allows users to enter any combination of letters and numbers and have them in encrypted form.
- Time: Allows users to enter a local time. For example, "7:40 PM", "14:40", "14:40:00", and "14:40:00:000" are all valid times for this field.
- URL: Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

Buttons at the bottom right include "Next" and "Cancel".

Screenshot of the Salesforce Object Manager for the Department object, showing the creation of a new custom field.

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

The main content area displays the "New Custom Field" page, Step 2 of 4. The field label is "Dept_No." and the field name is also "Dept_No.". The "Required" checkbox is unchecked. The "Auto add to custom report type" checkbox is checked, with the sub-option "Add this field to existing custom report types that contain this entity" selected.

At the bottom, there is a "Default Value" section with a "Show Formula Editor" button. A tooltip for the formula editor explains its purpose: "Enter the text and picklist value API names in double quotes ('Text', 'picklist'). Include numbers without quotes ('123'). Enter percentages as decimal (.123), and express date calculations in the standard format ('Today') - To reference a field from a Custom Metadata type record use 'CustomMetadataType__FieldReferenceName'." Buttons at the bottom right include "Previous", "Next", and "Cancel".

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

The left sidebar shows navigation links: Setup, Home, Object Manager, and Department.

The main area displays the 'Fields & Relationships' section with 7 items, sorted by Field Label.

| FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
|------------------|----------------|---------------------------------|-------------------|---------|
| Created By | CreatedBy | Lookup(User) | | |
| Department Name | Name | Text(80) | | ✓ |
| Dept_email | Dept_email_c | Email | | |
| Dept_No | Dept_No_c | Phone | | |
| Last Modified By | LastModifiedBy | Lookup(User) | | |
| Owner | OwnerId | Lookup(User/Group) | | ✓ |
| Total_Count | Total_Count_c | Roll-Up Summary (COUNT College) | | |

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

Screenshot of the 'Create Custom Field' dialog for the 'Department' object.

The left sidebar shows navigation links: Setup, Home, Object Manager, and Department.

The main area shows the 'Data Type' section with the following options:

- 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.
- Rollup Summary: A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
- Lookup Relationship: Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a pop-up list. The other object is the source of the values in the list.
 - The relationship field is required on all detail records.
 - The ownership and sharing of a detail record are determined by the master record.
 - When a user deletes the master record, all detail records are deleted.
 - You can create rollup summary fields on the master record to summarize the detail records.
- Master-Detail Relationship: Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:
 - The relationship field is required on all detail records.
 - The ownership and sharing of a detail record are determined by the master record.
 - When a user deletes the master record, all detail records are deleted.
 - You can create rollup summary fields on the master record to summarize the detail records.
- External Lookup Relationship: Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

Buttons at the bottom right include Next and Cancel.

Setup Home Object Manager

SETUP > OBJECT MANAGER Department

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

Department New Relationship

Step 6: Add custom related lists Step 6 of 6

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

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

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

Add Related List: Page Layout Name
 College Layout
 Append related list to users' existing personal customizations

Previous Save & New Save Cancel

Setup Home Object Manager

SETUP > OBJECT MANAGER College

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

Data Type

None Selected Select one of the data types below.

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

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

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

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

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

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

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

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

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

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

Date Allows users to enter a date or pick a date from a pop-up calendar.

Setup Home Object Manager

SETUP > OBJECT MANAGER: College

Details:

Fields & Relationships

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

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

Setup Home Object Manager

SETUP > OBJECT MANAGER: College

Details:

Fields & Relationships

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

Step 3. Define the summary calculation Step 3 of 5

Select Object to Summarize

Master Object: College
Summarized Object: Department

Select Roll-up Type

COUNT
 SUM
 MIN
 MAX

Field to Aggregate:

Filter Criteria

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

Previous Next Cancel

SETUP > OBJECT MANAGER

College

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Fields & Relationships

5 items. Sorted by Field Label

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

SETUP

Lightning Experience App Manager

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

| App Name | Developer Name | Description | Last Modified Date | App T... | Visits... |
|---------------------------|--------------------------|--|----------------------|-----------|-----------|
| All Tabs | AllTabSet | | 01/10/2023, 6:39 am | Classic | ✓ |
| Analytics Studio | Insights | Build CRM Analytics dashboards and apps. | 01/10/2023, 6:39 am | Classic | ✓ |
| App Launcher | AppLauncher | App Launcher tabs | 01/10/2023, 6:39 am | Classic | ✓ |
| Bolt Solutions | LightningBolt | Discover and manage business solutions designed for your industry. | 01/10/2023, 6:42 am | Lightning | ✓ |
| Community | Community | Salesforce CRM Communities | 01/10/2023, 6:39 am | Classic | ✓ |
| Content | Content | Salesforce CRM Content | 01/10/2023, 6:39 am | Classic | ✓ |
| Cosmetic store management | Cosmetic_store | | 17/10/2023, 11:50 am | Lightning | ✓ |
| Data Manager | DataManager | Use Data Manager to view limits, monitor usage, and manage recipes. | 01/10/2023, 6:39 am | Lightning | ✓ |
| Digital Experiences | SalesforceCMS | Manage content and media for all of your sites. | 01/10/2023, 6:39 am | Lightning | ✓ |
| Lightning Usage App | LightningInstrumentation | View Adoption and Usage Metrics for Lightning Experience. | 01/10/2023, 6:39 am | Lightning | ✓ |
| Marketing | Marketing | Best-in-class on-demand marketing automation | 01/10/2023, 6:39 am | Classic | ✓ |
| Platform | Platform | The fundamental Lightning Platform | 01/10/2023, 6:39 am | Classic | ✓ |
| Queue Management | QueueManagement | Create and manage queues for your business. | 01/10/2023, 6:39 am | Lightning | ✓ |
| Sales | Sales | The world's most popular sales force automation (SFA) solution. | 01/10/2023, 6:39 am | Classic | ✓ |
| Sales | LightningSales | Manage your sales process with accounts, leads, opportunities, and more. | 01/10/2023, 6:39 am | Lightning | ✓ |

New Lightning App

App Details & Branding

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

App Details

*App Name

*Developer Name

Description

App Branding

Image

Primary Color Hex Value #007002

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

App Launcher Preview

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

Next

New Lightning App

App Details & Branding

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

App Details

*App Name

*Developer Name

Description

App Branding

Image

Primary Color Hex Value #007002

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

App Launcher Preview

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

Next

New Lightning App

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

Navigation and Form Factor

*Navigation Style
 Standard navigation
 Console navigation

*Supported Form Factors
 Desktop and phone
 Desktop
 Phone

Setup and Personalization

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

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

Back Next

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

New Lightning App

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



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

Back Next

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

New Lightning App

App Details

*App Name: My_App

*Developer Name: My_App

Description: Enter a description.

App Branding

Image: Upload

Primary Color Hex Value: #0070D2

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

App Launcher Preview

My My_App

Next

Available Profiles

Selected Profiles

System Administrator

Save & Finish

Queue Management QueueManagement Create and manage queues for your business. 01/10/2023, 6:39 am Lightning ✓

Sales Sales The world's most popular sales force automation (SFA) solution. 01/10/2023, 6:39 am Classic ✓

Sales LightningSales Manage your sales process with accounts, leads, opportunities, and more. 01/10/2023, 6:39 am Lightning ✓

New Lightning App

Available Profiles

Selected Profiles

System Administrator

Save & Finish

Queue Management QueueManagement Create and manage queues for your business. 01/10/2023, 6:39 am Lightning ✓

Sales Sales The world's most popular sales force automation (SFA) solution. 01/10/2023, 6:39 am Classic ✓

Sales LightningSales Manage your sales process with accounts, leads, opportunities, and more. 01/10/2023, 6:39 am Lightning ✓

Colleges

Recently Viewed ▾

0 items • Updated a few seconds ago

college Name

New college

* = Required Information

Information

*college Name

AVS Engineering college

Owner

Manibharathi G

Cancel Save & New Save

This screenshot shows a software application window titled 'New college'. At the top, there's a navigation bar with icons for 'New', 'Import', and 'Change Owner'. Below the navigation bar, there are several small icons. The main area contains a form with a title 'New college'. A note says '* = Required Information'. The first field is labeled 'Information' and has a placeholder 'college Name'. The input field contains the text 'AVS Engineering college'. To the right of this field, it says 'Owner' and shows a profile picture of 'Manibharathi G'. At the bottom of the form are three buttons: 'Cancel', 'Save & New', and a blue 'Save' button.

This screenshot shows the 'Details' tab for the 'AVS Engineering college' record in the Salesforce interface. The top navigation bar includes links for Service, Home, Chatter, Accounts, Contacts, Cases, Reports, Dashboards, Colleges, departments, Details, providers, Consumers, and Managements. A search bar is at the top right. The main content area displays the college's name, owner (Manibharathi G), creation date (28/10/2023, 7:38 pm), and modification date (28/10/2023, 7:38 pm). A 'Related' section is also visible.

This screenshot shows a 'New department' dialog box. The top navigation bar is identical to the previous screenshot. The dialog has a 'Recently Viewed' sidebar on the left. The main form contains fields for 'department Name' (CSE) and 'college' (AVS Engineering college). A note indicates that the 'department Name' field is required. At the bottom are 'Cancel', 'Save & New', and 'Save' buttons.

Service Home Chatter Accounts Contacts Cases Reports Dashboards Colleges departments Details providers Consumers Managements

Search...

college **AVS Engineering college**

New Contact New Opportunity

| Related | Details |
|--|--|
| College Name AVS Engineering college | Owner Manibharathi G |
| Total_count 1 | |
| Created By Manibharathi G , 28/10/2023, 7:38 pm | Last Modified By Manibharathi G , 28/10/2023, 7:38 pm |

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

Salesforce Setup - Job Profile - New Custom Object | Sales - Lightning Experience | Sales

WhatsApp App Job Profile New Custom Object | Sales Lightning Experience | Sales

Gmail YouTube Maps Global NetAcad ... Edubee Interactive...

Search Setup

Setup Home Object Manager

SETUP New Custom Object

New Custom Object

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

Custom Object Definition Edit

Custom Object Information

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

Label: Details **Example:** Account

Plural Label: Details **Example:** Accounts

Starts with visual sound:

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

Object Name: Details **Example:** Account

Description:

Context-Sensitive Help Setting:

Open the standard Salesforce.com Help & Training window

Open a window using a Visualforce page

Content Name:

Enter Record Name Label and Format

The Default Name appears in most layouts, tabs, lists, related lists, Analytics, and search results. For example, the Default Name for Account is "Account Name" and for Case it is "Case Number". Note that the Default Name field is always called "Record Name" even though it's not displayed via the API.

1.JPG New Custom Object | Sales any2.htm assignment

Help for this Page

Salesforce Setup - Job Profile - Details | Salesforce - Lightning Experience | Sales

WhatsApp App Job Profile Details | Salesforce Lightning Experience | Sales

Gmail YouTube Maps Global NetAcad ... Edubee Interactive...

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Details

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Details

Description:

API Name: Details_c

Custom:

Singular Label: Details

Plural Label: Details

Enable Reports:

Track Activities:

Track Field History:

Deployment Status: Deployed

Help Settings: Standard salesforce.com Help Window

2.JPG Details | Salesforce - Google any2.htm assignment

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

The page shows the Fields & Relationships section with the following details:

| FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
|------------------|----------------|--------------------|-------------------|---------|
| Created By | CreatedBy | Lookup(User) | | |
| Detail Name | Name | Text(50) | | |
| Last Modified By | LastModifiedBy | Lookup(User) | | |
| Owner | OwnerId | Lookup(User.Group) | | |

The sidebar on the left lists other configuration options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, Scoping Rules, Triggers, and Flow Triggers.

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

The sidebar on the left lists the same configuration options as the previous screenshot.

The Fields & Relationships section displays three relationship types:

- 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.
 - This 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 defines the master record, all detail records are defined.
 - You can create rollup summary fields on the master record to summarize the detail records.
- Master Detail Relationship**: 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**: Allows users to select a True (checked) or False (unchecked) value.

Below these descriptions, a list of field types is shown with their descriptions:

- Checklist**: Allows users to enter a True or False value.
- Currency**: Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
- Date**: Allows users to enter a date or pick a date from a popup calendar.
- DateTime**: Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the DateTime field.
- Email**: Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
- Geolocation**: Allows users to define locations, includes latitude and longitude components, and can be used to calculate distance.
- Number**: Allows users to enter any number. Leading zeros are removed.
- Percent**: Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.
- Phone**: Allows users to enter any phone number. Automatically formats it as a phone number.
- Picklist**: Allows users to select a value from a list you define.
- Picklist (Multi-Select)**: Allows users to select multiple values from a list you define.
- Text**: Allows users to enter any combination of letters and numbers.

Salesforce Setup - Details | Salesforce - Lightning Experience | Sales - +

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER Details

Details New Custom Field Step 2 of 4

Field Label: Mail

Field Name: Mail

Description:

Help Text:

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

Unique: Do not allow duplicate values.

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

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

Show Formula Editor

Default Value:

Help for this Page

Previous Next Cancel

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Salesforce Setup - Details | Salesforce - Google - arvind - Lightning Experience | Sales - +

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER Details

Details New Custom Field Step 4 of 4

Field Label: Mail

Data Type: Email

Field Name: Mail

Description:

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

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

Add Field Page Layout Name: Details Layout

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

Previous Save & New Save Cancel

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

WhatsApp Job Profile Details | Salesforce Lightning Experience | Sale... +

nammudhalvan-dev-ed.lightning.force.com/lightning/setup/ObjectManager/015h000000j05jy/FieldsAndRelationships/new

Gmail YouTube Maps Global NetAcad ... Edit Interactive ...

Setup Home Object Manager

Search Setup

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

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

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

Allows users to enter a date or pick a date from a pop-up calendar.

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

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

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

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

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

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

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

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

Allows users to enter any combination of letters and numbers.

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

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

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

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

Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:50:600" are all valid times for this field.

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

Next Cancel

WhatsApp Job Profile Details | Salesforce Lightning Experience | Sale... +

nammudhalvan-dev-ed.lightning.force.com/lightning/setup/ObjectManager/015h000000j05jy/FieldsAndRelationships/new

Gmail YouTube Maps Global NetAcad ... Edit Interactive ...

Setup Home Object Manager

Search Setup

SETUP > OBJECT MANAGER Details

Details New Custom Field Step 2 of 4 Help for this Page

Step 2: Enter the details

Field Label: Step 2 of 4

Field Name: Previous Next Cancel

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 entry

Default Value:

Use Formula Editor. Enter text and picklist values in double quotes ("Bob", "New") or include numbers without quotes (10). Enter dates/times as dd/MM/yy and times in 24-hour format (10:00). To reference a field from a Custom Metadata type record use: \$CustomMetadataType__r.RecordName.FieldName

Previous Next Cancel

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

The page title is "SETUP > OBJECT MANAGER Details".

The left sidebar shows the "Fields & Relationships" section selected.

The main content area is titled "New Custom Field" and "Step 4: Add to page layouts".

Field details:

- Field Label: Phone
- Data Type: Phone
- Field Name: Phone
- Description: (empty)

Instructions: "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." Below this, there are two checkboxes:

- Add Field - Page Layout Name
- Details Layout

Buttons at the bottom right: Previous, Save & New, Save (highlighted), Cancel.

Bottom status bar: WhatsApp, Job Profile, Details | Salesforce, Google, avn2, NM assignment.

Screenshot of the Salesforce Setup interface showing the selection of a field type.

The page title is "SETUP > OBJECT MANAGER Details".

The left sidebar shows the "Fields & Relationships" section selected.

The main content area displays a list of field types with their descriptions:

- Currency: Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
- Date: Allows users to enter a date or pick a date from a popup calendar.
- DateTime: Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
- Email: Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking "Send an Email". Note that custom email addresses cannot be used for mass emails.
- Geolocation: Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
- Number: Allows users to enter any number. Leading zeros are removed.
- Percent: Allows users to enter a percentage number, for example, "10" and automatically adds the percent sign to the number.
- Phone: Allows users to enter any phone number. Automatically formats it as a phone number.
- Picklist: Allows users to select a value from a list you define.
- Picklist (Multi-Select): Allows users to select multiple values from a list you define.
- Text: Allows users to enter any combination of letters and numbers.
- Text Area: Allows users to enter up to 255 characters on separate lines.
- Text Area (Long): Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.
- Text Area (Encrypted): Allows users to enter any combination of letters and numbers and store them in encrypted form.
- Time: Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:00:007" are all valid times for this field.
- URL: Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

Buttons at the bottom right: Next, Cancel.

Bottom status bar: WhatsApp, Job Profile, Details | Salesforce - Goog, avn2, NM assignment.

Salesforce Setup - Job Profile - Details | Salesforce - Lightning Experience | Sales - +

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER Details

New Custom Field

Step 2 of 4

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

Field Label: Date

Field Name: Date

Description:

Help Text:

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

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

Default Value: Show Formula Editor

User Services success. Enclose text and picklist values in double quotes ("Text", "Value"). Include numbers without spaces ("123"). Enter percentages as decimal (.123), and specify date calculations in the standard format ('MM/DD/YY'). To reference a field from a custom metadata type record, put '{CustomMetadataType__r.Id}'.

Previous Next Cancel

Salesforce Setup - Job Profile - Details | Salesforce - Google - anv2 - HFM assignment

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER Details

New Custom Field

Step 4 of 4

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

Field Label: Date

Data Type: Date

Field Name: Date

Description:

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

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

Add Field Page Layout Name

Details Layout

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

Previous Save & New Save Cancel

Salesforce Setup - Details | Salesforce

nanmudhalvan-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01356000000j0Sj/fieldAndRelationships/new

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Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER Details

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

Field Label: Gender

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

Main Value: Female

Display values alphabetically, not in the order entered
Use first value as default value
Reselect picklist to the values defined in the value set

Field Name: Gender

Description:

Help Text:

Next Cancel

Salesforce Setup - Details | Salesforce

nanmudhalvan-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01356000000j0Sj/fieldAndRelationships/new

Gmail YouTube Maps Global NetAcad LinkedIn E-LabVIEW Interactive...

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER Details New Custom Field 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

Main Value: Female

Display values alphabetically, not in the order entered
Use first value as default value
Reselect picklist to the values defined in the value set

Field Name: Gender

Description:

Help Text:

Salesforce Setup - Object Manager - Details

New Custom Field

Step 4: Add to page layouts Step 4 of 4

| | |
|-------------|----------|
| Field Label | Gender |
| Data Type | Picklist |
| Field Name | Gender |
| Description | |

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

Add Field Page Layout Name

Details Layout

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

Previous Save & New Save Cancel

WhatsApp Job Profile Details | Salesforce Lightning Experience | Sales +

Gmail YouTube Maps Global NetAcad Edvibe Interactive...

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER Details

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

Salesforce Setup - Object Manager - Details

Fields & Relationships

| FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
|------------------|------------------|--------------------|-------------------|---------|
| Created By | CreatedById | Lookup(User) | | |
| Date | Date_c | Date | | |
| Details Name | Name | Text(80) | | |
| Gender | Gender_c | Picklist | | |
| Last Modified By | LastModifiedById | Lookup(User) | | |
| Mail | Mail_c | Email | | |
| Owner | OwnerId | Lookup(User/Group) | | |
| Phone | Phone_c | Phone | | |

Quick Find New Deleted Fields Field Dependencies Set History Tracking

WhatsApp Job Profile Details | Salesforce Lightning Experience | Sales +

Gmail YouTube Maps Global NetAcad Edvibe Interactive...

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER Details

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

Salesforce Setup - Tabs | Salesforce

Job Profile | Tabs | Salesforce | Lightning Experience | Sales

Gmail YouTube Maps Global NetAcad ... Edubee Interactive ...

Search Setup

Setup Home Object Manager

Tabs

New Custom Object Tab

Step 1. Enter the Details

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

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

Object: Details

Tab Style: Lightning

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

Splash Page Custom Link: None

Enter a short description.

Description:

Cancel

Help for this Page

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

Salesforce Setup - Tabs | Salesforce

Job Profile | Tabs | Salesforce | Lightning Experience | Sales

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Search Setup

Setup Home Object Manager

Tabs

Custom Tabs

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

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

| Action | Label | Tab Style | Description |
|------------|-------------------|----------------|-------------|
| Edit Dri | Colleagues | Building Block | |
| Edit Dri | Opportunities | Credit card | |
| Edit Dri | Details | Lightning | |
| Edit Dri | Enquiries | Dynamic | |
| Edit Dri | Expense reports | Highway sign | |
| Edit Dri | Invoices | Card | |
| Edit Dri | Our customers | Anytime | |
| Edit Dri | Properties | None | |
| Edit Dri | retailers | Star | |
| Edit Dri | Skincare products | Orange | |
| Edit Dri | Students | Yellow | |

New : What Is This?

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

Salesforce Setup Home Object Manager

Search Setup

Flows

Flow Category All Flows

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

| Flow Label | Process Type | Active | Temp... | Package State | Pack... | Last Modif... | Last Modified Date |
|--|----------------------------|-------------------------------------|-------------------------------------|-------------------|-------------|---------------------|--------------------|
| Basic Approval Request | Flow Orchestration for CMS | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-Installed | | | |
| Book Appointment from Invitation | Salesforce Scheduler Flow | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-Installed | | | |
| Cancel Item Flow | Screen Flow | <input type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-Installed | | | |
| Change Case Owner to Incident Owner | Screen Flow | <input type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-Installed | | | |
| Close Change Request & Related Issues | Screen Flow | <input type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-Installed | | | |
| CMS: Check Whether Any Step is Completed | Evaluation Flow | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-Installed | | | |
| CMS: Notify Content Author | Screen Flow | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-Installed | | | |
| CMS: Review Content | Screen Flow | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-Installed | | | |
| CMS: Submit Content for Review | Screen Flow | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-Installed | | | |
| CMS: Withdraw Review Request | Screen Flow | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-Installed | | | |
| Consultant | Screen Flow | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Unmanaged | Ajmal Akram | 17/10/2023, 1:11 pm | |
| Create a Case | Screen Flow | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-Installed | | | |
| Create Order Summary Flow | AutoLaunched Flow | <input type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-Installed | | | |
| Create Process Exception Flow | AutoLaunched Flow | <input type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-Installed | | | |

Flow Trigger Explorer New Flow

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

Flow Builder

New Flow

Toolbox

Elements Manager

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 auto-launched flow runs in the background.

Schedule-Triggered Flow
Launches at a specified time and frequency for each record in a batch. This auto-launched flow runs in the background.

Platform Event—Triggered Flow
Launches when a platform event message is received. This auto-launched flow runs in the background.

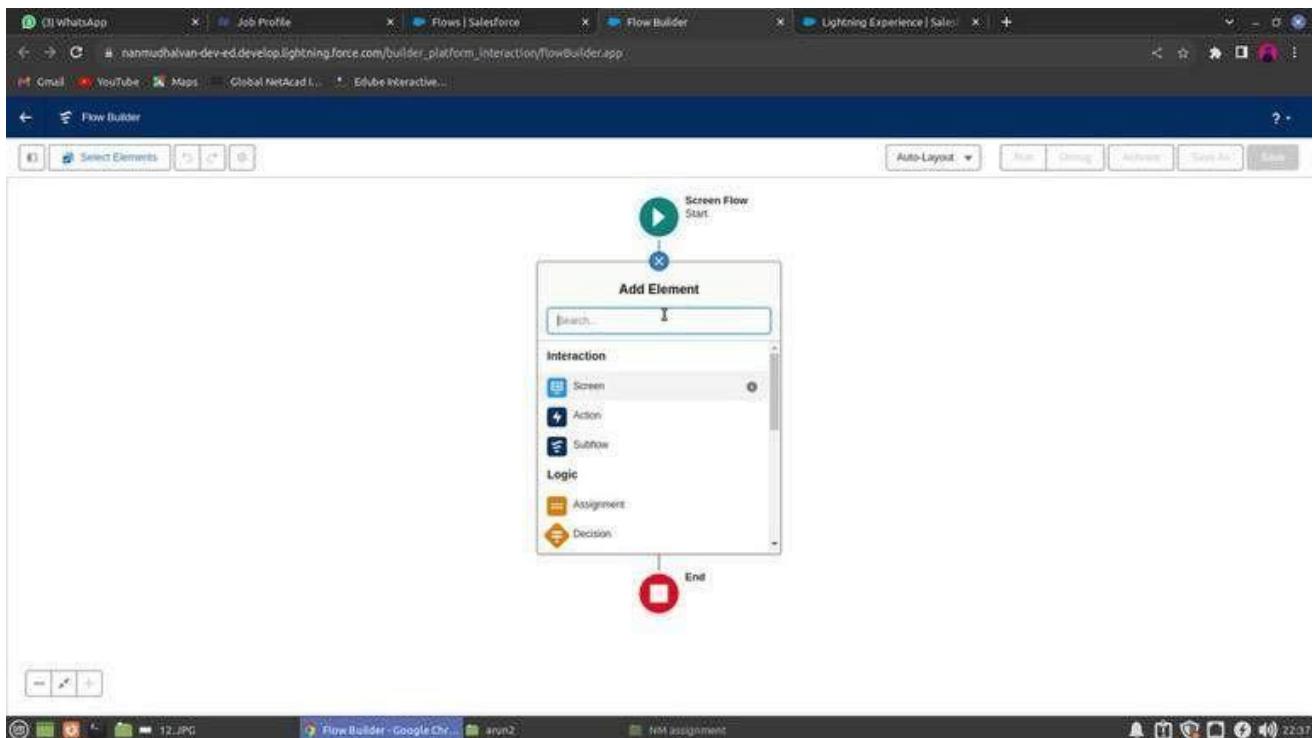
AutoLaunched Flow (No Trigger)
Launches when invoked by Apex, processes, REST API, and more. This auto-launched flow runs in the background.

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

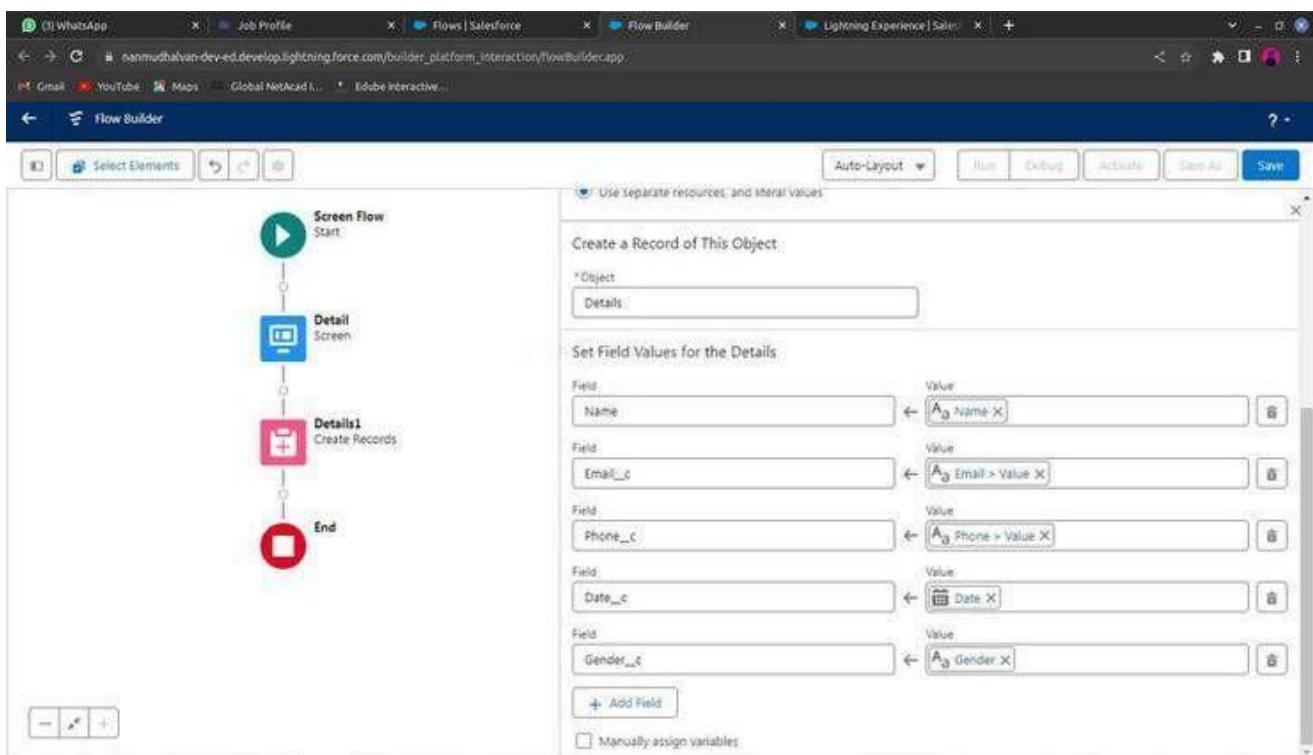
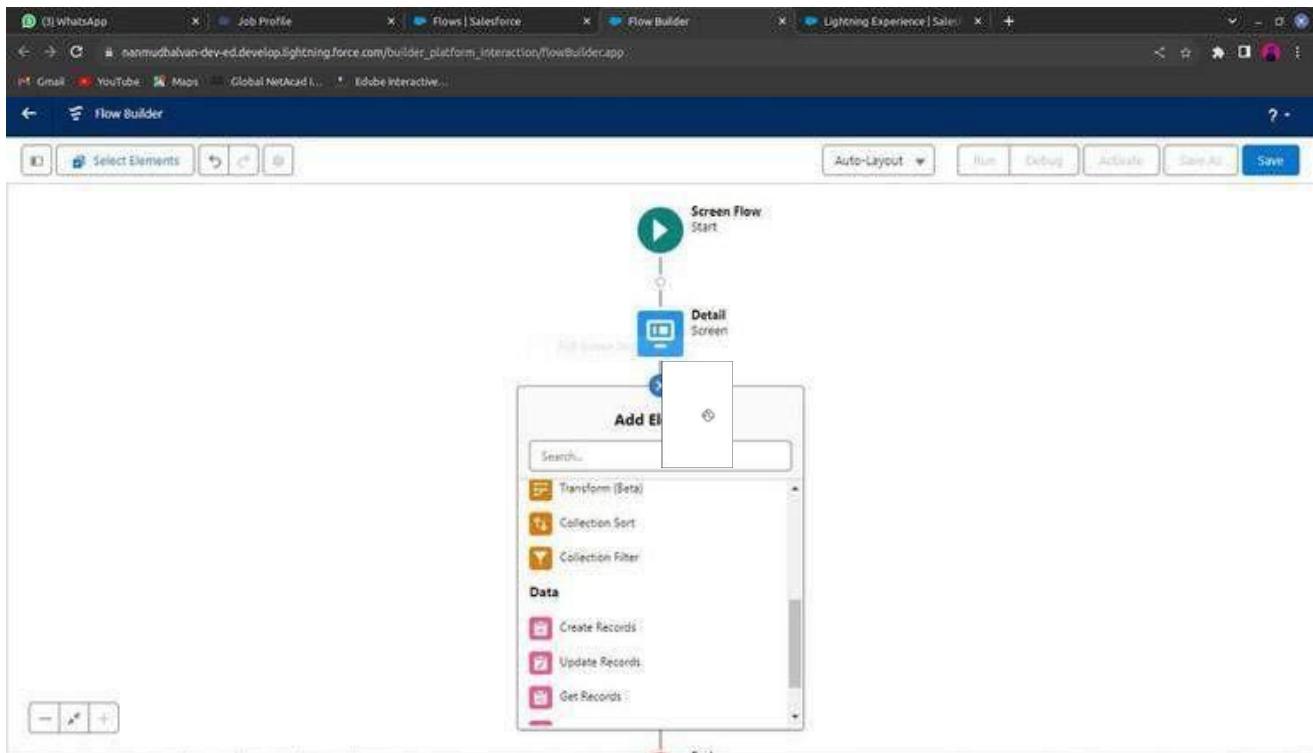
Create

Get more on the AppExchange

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



The screenshot shows the "New Screen" configuration dialog within the Flow Builder interface. The title bar says "New Screen". On the left, there are tabs for "Components" and "Fields". Under "Fields", there are four input fields: "First Name" (text), "Last Name" (text), "Email" (text), and "Phone" (text). To the right of these fields is a "Date" component configuration panel. The "Date" panel includes fields for "Label", "API Name" (with placeholder "MM/DD/YYYY"), a "Require" checkbox, and a "Default Value" dropdown set to "MM/DD/YYYY". Below the date panel are sections for "Set Component Visibility", "Validate Input", and "Provide Help". At the bottom of the dialog are "Cancel" and "Done" buttons. The bottom of the screen features standard window controls and a toolbar with icons for Select Elements, Auto-Layout, Run, Debug, Archive, Save As, and New.



Details

name
Manibharathi

Phone
7603926246

Email
manibharathi2002@gmail.com

DOB
02-May-2003

Gender
male

[Next](#)

avengineeringcollege6-dev-ed--cdevelop.vf.force.com/flow/Details/3015j000001WqywAAC

Service Home Chatter Accounts Contacts Cases Dashboards Colleges departments Details providers Consumers Managements

Details

Details

Name
Manibharathi

Email
manibharathi2002@gmail.com

Phone
7603926246

DOB
02/05/2003

Gender
Male

Created By
 Manibharathi G, 28/10/2023, 7:41 pm

Last Modified By
 Manibharathi G, 28/10/2023, 7:41 pm

3. Suppose there are 2 Users and they are having Create, Read, Edit access on Account Object with the same profile but we want to open up the access for one user to delete how will you implement the Security setting.

Salesforce Setup - Job Profile - New Custom Object | Sales - Lightning Experience | Sales

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

Setup Home Object Manager

Search Setup

SETUP New Custom Object

New Custom Object

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. Tell me more Get help for this page

Custom Object Definition Edit Save Save & New Cancel

Custom Object Information Required Information

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

Label: Example: Accounts

Plural Label: Example: Accounts

Starts with visual sound:

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

Object Name: Example: Account

Description:

Context-Sensitive Help Setting:

Open the standard Salesforce.com Help & Training window

Open a window using a Visualforce page

Content Name:

Enter Record Name Label and Format:

The Record Name appears in new, status, history, related lists, Analytics, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Next Step Back Step

WhatsApp Job Profile New Custom Object | Sales Lightning Experience | Sales

Gmail YouTube Maps Global NetAcad Edubee Interactive...

Search Setup

Setup Home Object Manager

Help for this Page

Help for this Page

12:43

Salesforce Setup - Job Profile - Tabs | Salesforce - Lightning Experience | Sales

namnudhalvan-dev-ed.lightning.force.com/lightning/setup/CustomTabs/pageAddress%2Fsetup%2Fu%2FobjectCustomTabWizard%3FreURL%3D%252Fset%252Fd%252Fcus...
Gmail YouTube Maps Global NetAcad Edubee Interactive...

Setup Home Object Manager

Search Setup

SETUP Tabs

New Custom Object Tab

Step 1: Enter the Details Step 1 of 3

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

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

Object: Management

Tab Style: Cards

(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

WhatsApp Tabs | Salesforce - Google

Gmail YouTube Maps Global NetAcad Edubee Interactive...

Search Setup

Setup Home Object Manager

Help for this Page

Help for this Page

22:44

WhatsApp Job Profile Tabs | Salesforce Lightning Experience | Sales +

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

Gmail YouTube Maps Global NetAcad ... Edible Interactive ...

Setup Home Object Manager

Search Setup

tabs

User Interface

Rename Tabs and Labels

Tabs

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

SETUP Tabs

Custom Object Tabs

| Action | Label | Tab Style | Description |
|------------|---------------------|----------------|-------------|
| Edit Del | Colleagues | Building Block | |
| Edit Del | Departments | Check card | |
| Edit Del | Details | Lightning | |
| Edit Del | Executives | Element | |
| Edit Del | Experience app tabs | Lightning | |
| Edit Del | Internships | CD/DVD | |
| Edit Del | Managements | Camera | |
| Edit Del | our customers | Home | |
| Edit Del | Properties | Anywhere | |
| Edit Del | retailers | Highway Sign | |
| Edit Del | Silence products | Info | |
| Edit Del | Stakeholders | Strength | |

Web Tabs

New What is This?

No Web Tabs have been defined

WhatsApp Job Profile Flows | Salesforce Lightning Experience | Sales +

nanmudhalvan-dev-ed.lightning.force.com/builder_platform_interaction/flowBuilderapp...

Gmail YouTube Maps Global NetAcad ... Edible Interactive ...

My-app Recently Viewed College Department Details Management

Management Recently Viewed

0 items Updated a few seconds ago

Management Name

Add Screen Step

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

WhatsApp Job Profile Flows | Salesforce Lightning Experience | Sales +

nanmudhalvan-dev-ed.lightning.force.com/builder_platform_interaction/flowBuilderapp...

Gmail YouTube Maps Global NetAcad ... Edible Interactive ...

My-app Recently Viewed College Department Details Management

Management Recently Viewed

0 items Updated a few seconds ago

Management Name

Add Screen Step

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

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

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

The screenshot shows the Salesforce Setup interface under the Profiles section. On the left, a sidebar lists various categories: Hyperforce Assistant, Users (Profiles is selected), Data, Feature Settings, Data.com, Marketing, Sales, and Products. The main content area displays a table titled 'Profiles' with columns for Action, Profile Name, User License, and Custom. The table lists several profiles: Salesforce API Only System Interactors (Salesforce Integration), Silver Partner User (Silver Partner), Solution Manager (Salesforce), Standard Platform User (Salesforce Platform), Standard User (Salesforce), and System Administrator (Salesforce). A navigation bar at the bottom includes links for Previous, Next, and Page 1 of 1.

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

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

The screenshot shows the Salesforce Setup interface under the Profiles section. The sidebar is identical to the previous screenshot. The main content area is titled 'Profile Edit Manager' and contains a sub-header 'Set the permissions and page layouts for this profile.' Below this is a 'Profile Edit' form with fields for Name (Manager), User License (Salesforce Platform), and Description. A 'Custom Profile' checkbox is checked. The 'Custom App Settings' section contains two tables of app settings. The first table includes Analytics Studio (standard_insights), App Launcher (standard_AppLauncher), and My-app (Myapp). The second table includes Platform (standard_Platform) and WCC (standard_Work). The 'Service Provider Access' section is partially visible at the bottom. A note at the bottom right indicates 'Required Information'.

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

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

Search Setup

Setup Home Object Manager

Profiles

Context Point Consents, Contact Point Emails, Streaming Channels, User External Credentials

Custom Object Permissions

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

Profile Manager

Help for this Page

Name: Manager, Manager: Salesforce Platform, Custom Profile:

User License: Not Assigned, Description: Not Assigned, Created By: Admin_2, Created Date: 10/10/2023, 3:47 pm, Modified By: Admin_2, Modified Date: 10/10/2023, 3:48 pm

Page Layouts

Standard Object Layouts

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

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

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

Search Setup

Setup Home Object Manager

Profiles

Profile Manager

Help for this Page

Name: Manager, Manager: Salesforce Platform, Custom Profile:

User License: Not Assigned, Description: Not Assigned, Created By: Admin_2, Created Date: 10/10/2023, 3:47 pm, Modified By: Admin_2, Modified Date: 10/10/2023, 3:48 pm

Page Layouts

Standard Object Layouts

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

Salesforce Setup - Job Profile - Flows | Salesforce - Flow Builder - Lightning Experience | Sales -

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

Search Setup

Setup Home Object Manager

user

Users

Permission Set Groups

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Service

Embedded Service

Messaging for In-App and Web User

SETUP

Users

New User

User Edit

Save Save & New Cancel

General Information

First Name: manager

Last Name: 1

Alias: m1

Email: manager.aaa@gmail.com

Username: manager.aaa@gmail.com

Nickname: User1097624338709764377

Title:

Company:

Department:

Division:

Role: Marketing Team

User License: Salesforce Platform

Profile: Manager

Active:

Marketing User:

Office User:

Knowledge User:

Flow User:

Service Cloud User:

Site.com Contributor User:

Site.com Publisher User:

WDO User:

Help for this Page

1

Required Information

Salesforce Setup - Job Profile - Flows | Salesforce - Flow Builder - Lightning Experience | Sales -

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

Search Setup

Setup Home Object Manager

user

Users

Permission Set Groups

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Service

Embedded Service

Messaging for In-App and Web User

SETUP

Users

New User

User Edit

Save Save & New Cancel

General Information

First Name: manager

Last Name: 2

Alias: m2

Email: managerxyz.xyz@gmail.com

Username: managerxyz.xyz@gmail.com

Nickname: User1097624453758508865

Title:

Company:

Department:

Division:

Role: Marketing Team

User License: Salesforce

Profile: Solution Manager

Active:

Marketing User:

Office User:

Knowledge User:

Flow User:

Service Cloud User:

Site.com Contributor User:

Site.com Publisher User:

WDO User:

Help for this Page

1

Required Information

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

The screenshot shows the Salesforce Setup interface under the 'Permission Sets' section. On the left, a sidebar lists various setup categories like Hyperforce Assistant, Lightning Experience Transition Assistant, Users, Feature Settings, Sales, Accounts, and Salesforce Scheduler. The 'Permission Sets' option is selected. The main content area is titled 'Permission Sets' and contains a table listing 1-25 of 30 permission sets. The columns include Action, Permission Set Label, Description, and License. Examples shown include 'Buyer', 'Buyer Manager', 'Cloud Integration User', 'CRM User', 'Commerce Admin', 'Contact Center Admin', 'Contact Center Agent', 'Contact Center Supervisor', 'Experience Profile Manager', 'Facility Manager', and 'Salesforce'. Each row has a 'Clone' link and a detailed description of its permissions.

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

This screenshot shows the details for a specific permission set named 'manager12'. The top navigation bar includes links for Find Settings, Clone, Delete, Edit Properties, Manage Assignments, and View Summary (Beta). The 'Permission Set Overview' section displays the API Name as 'manager12', Namespace Prefix as 'manager12', Created By as 'Anil J.', and Last Modified By as 'Anil J.' with a timestamp of 18/10/2023, 3:52 pm. Below this, the 'Apps' section lists several settings: 'Assigned Apps' (specifying which apps are visible in the app menu), 'Assigned Connected Apps' (specifying which connected apps are visible in the app menu), 'Object Settings' (permissions to access objects and fields, and settings such as tab availability), 'API Permissions' (authorizations to perform app-specific actions, such as 'Manage Call Centers'), and 'Apex Class Access'.

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

Permission Sets

manager12

Object Permissions

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

Field Permissions

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

Video Tutorial | Help for this Page

avseengineeringcollege6-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/0PS5j000008A2sB/PermissionSetAssignment/new

All Users

1 item selected

| Full Name | Alias | Username | Role | Active | Profile |
|------------------|---------|---|----------------|-------------------------------------|----------------------------------|
| Chatter Expert | Chatter | chatty.00d5j00000cirhdean.1nrm7lhtz46o@chatter.salesforce.com | Marketing Team | <input checked="" type="checkbox"/> | Chatter Free User |
| consumer 1 | c1 | consumer1.aa@gmail.com | Marketing Team | <input checked="" type="checkbox"/> | consumer |
| Integration User | integ | integration@00d5j00000cirhdean.com | | <input checked="" type="checkbox"/> | Analytics Cloud Integration User |
| Manager 1 | m1 | managermani1@gmail.com | Marketing Team | <input checked="" type="checkbox"/> | Manager |
| Manager 2 | m2 | managermani21@gmail.com | Marketing Team | <input checked="" type="checkbox"/> | Solution Manager |
| Manibharathi G | MG | manibharathi@praveen.com | | <input checked="" type="checkbox"/> | System Administrator |
| provider 1 | p1 | provider.aa@gmail.com | Marketing Team | <input checked="" type="checkbox"/> | provider |
| Security User | sec | insightssecurity@00d5j00000cirhdean.com | | <input checked="" type="checkbox"/> | Analytics Cloud Security User |

Cancel Next

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

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

Search Setup

Setup Home Object Manager

Select an Expiration Option For Assigned Users

No expiration date (radio button selected)

Specify the expiration date (radio button)

Time Zone (dropdown menu)

Selected Users

| Full Name | Role | Profile | Active | User License | Expires On |
|-----------|----------------|---------|--------|---------------------|---------------|
| manager1 | Marketing Team | Manager | ✓ | Salesforce Platform | Never Expires |

Cancel Back Assign

This screenshot shows the 'Select an Expiration Option For Assigned Users' dialog box. It includes options for 'No expiration date' (selected) and 'Specify the expiration date' (radio button), a 'Time Zone' dropdown, and a table of 'Selected Users'. The user 'manager1' is listed with details: Marketing Team role, Manager profile, active status, Salesforce Platform license, and 'Never Expires' expiration date. Navigation buttons 'Cancel', 'Back', and 'Assign' are at the bottom.

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

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

Search Setup

Setup Home Object Manager

... > SETUP > PERMISSION SET 'MANAGER12'

manager12

Current Assignments

| Full Name | Active | Role | Profile | User License | Expires On |
|-----------|--------|----------------|---------|---------------------|------------|
| manager1 | ✓ | Marketing Team | Manager | Salesforce Platform | |

Add Assignment

This screenshot shows the 'Current Assignments' section of the 'PERMISSION SET 'MANAGER12'' page. It displays a table of assignments for the user 'manager1'. The table columns are: Full Name, Active, Role, Profile, User License, and Expires On. The user 'manager1' is assigned to the Marketing Team role, Manager profile, and Salesforce Platform license. A 'Add Assignment' button is located at the top right of the table area.

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

New Custom Object

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Edit my object](#) [Edit custom profile](#)

Custom Object Definition Edit

Custom Object Information

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

| | | |
|--------------------------|------------------------------------|-------------------|
| Label: | <input type="text" value="Bank"/> | Example: Account |
| Plural Label: | <input type="text" value="Banks"/> | Example: Accounts |
| Starts with vowel sound: | <input type="checkbox"/> | |

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

| | | |
|--------------|-----------------------------------|------------------|
| Object Name: | <input type="text" value="Bank"/> | Example: Account |
|--------------|-----------------------------------|------------------|

Description:

Context-Sensitive Help Setting

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

Content Name

Enter Record Name Label and Format:

The Record Name appears in page headers, lists, detail pages, 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.

New Custom Object Tab

Step 1. Enter the Details

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

Object: Bank

Tab Style: [Edit](#) [Create](#) [Help](#)

(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:

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

WhatsApp Job Profile Bank | Salesforce Lightning Experience | Sales

namnudhalvan-dev-ed.lightning.force.com/lightning/setup/ObjectManager/015b000000jo7D/Details/view

Gmail YouTube Maps Global NetAcad Edubee Interactive

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Bank

Details

Description

API Name: Bank__c
Custom: ✓
Singular Label: Bank
Plural Label: Banks

Enable Reports
Track Activities
Track Field History

Deployment Status: Deployed
Help Settings: Standard salesforce.com Help Window

Edit Delete

https://namnudhalvan-dev-ed.lightning.force.com/lightning/v10/ObjectManager/015b000000jo7D/Details/view

Bank | Salesforce - Google Chrome arun4 22:48

WhatsApp Job Profile New Custom Object | Sales

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

Gmail YouTube Maps Global NetAcad Edubee Interactive

Search Setup

Setup Home Object Manager

SETUP

New Custom Object

Help for this Page

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Edit one object](#) [Edit all objects](#)

Custom Object Definition Edit

Custom Object Information

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

Label: Customer **Example:** Account

Plural Label: Customers **Example:** Accounts

Starts with vowel sound:

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

Object Name: Customer **Example:** Account

Description:

Context-Sensitive Help Setting

Open the standard Salesforce.com Help & Training window

Open a window using a Visualforce page

Content Name:

Enter Record Name Label and Format

The Default Name appears in name sources, lists, related lists, lookups, and search results. By convention, the Default Name for Accounts is "Account Name" and for Cases it is "Case Number". Note that the Default Name field is always called "Name" when referenced via the API.

https://namnudhalvan-dev-ed.lightning.force.com/lightning/v10/ObjectManager/new

New Custom Object | Sales arun4 22:48

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

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

Cloud Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER Customer

Details:

Fields & Relationships

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

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

Data Type

None Selected Select one of the data types below.

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

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

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

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

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

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

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

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

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

Next Cancel

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

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

Cloud Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER Customer

Details:

Fields & Relationships

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

New Relationship

Step 6, Add custom related lists Step 6 of 6

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

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

These are the page layouts that will include this field. Because this is a Master/Detail relationship, the field is required.
Add Related List Page Layout Name
 Bank Layout
 Append related list to users' existing personal customizations

Previous Save & New Save Cancel

Salesforce Setup - Profiles

Standard Platform User

Profile Detail

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

Page Layouts

| Standard Object Layouts | Global | Object Milestone |
|-------------------------|------------------------------|------------------------------------|
| Global (Assigned) | Global (Assigned) | Global Milestone Layout (Assigned) |
| Email Application | Not Assigned | Operating Hours Layout (Assigned) |
| Home Page Layout | Home Page Default (Assigned) | Order (Assigned) |

Help for this Page

Search Setup

Setup Home Object Manager

Hyperforce Assistant

Users

Profiles

Data

Mass Transfer Approval Requests

Feature Settings

Data.com

Prospector Preferences

Prospector Users

Functions

Marketing

Lead Processes

Sales

Products

Asset Settings

Salesforce 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: Management

Save Cancel

Help for this Page

Search Setup

Setup Home Object Manager

Hyperforce Assistant

Users

Profiles

Data

Mass Transfer Approval Requests

Feature Settings

Data.com

Prospector Preferences

Prospector Users

Functions

Marketing

Lead Processes

Sales

Products

Asset Settings

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

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

Search Setup

Setup Home Object Manager

Profiles Management

Profile Edit

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

Custom App Settings

| | Visible | Default | | Visible | Default |
|--------------------------------------|-------------------------------------|----------------------------------|------------------------------|-------------------------------------|-----------------------|
| Analytics Studio (standard_Insights) | <input type="checkbox"/> | <input checked="" type="radio"/> | Platform (standard_Platform) | <input checked="" type="checkbox"/> | <input type="radio"/> |
| App Launcher (standard_AppLauncher) | <input type="checkbox"/> | <input checked="" type="radio"/> | WCC (standard_Work) | <input type="checkbox"/> | <input type="radio"/> |
| My App (Myapp) | <input checked="" type="checkbox"/> | <input checked="" type="radio"/> | | | |

Service Provider Access

Required Information

This screenshot shows the 'Profiles' management screen in the Salesforce setup. A new profile named 'Management' is being created. The profile is assigned to the 'Salesforce Platform' user license and is set as a 'Custom Profile'. Under 'Custom App Settings', the 'Analytics Studio' and 'App Launcher' are visible but not default, while 'My App' is both visible and default. The 'Service Provider Access' section is partially visible at the bottom. The left sidebar shows various setup categories like Users, Data, and Marketing.

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

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

Search Setup

Setup Home Object Manager

Profiles

Contact Point Consents

| | Read | Create | Edit | Delete | View All | Modify All |
|----------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|--------------------------|--------------------------|
| Contact Point Emails | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Streaming Channels

| | Read | Create | Edit | Delete | View All | Modify All |
|---------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| User External Credentials | <input type="checkbox"/> |

Custom Object Permissions

| | Read | Create | Edit | Delete | View All | Modify All |
|------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| Bank | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| College | <input type="checkbox"/> |
| Customer | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Department | <input type="checkbox"/> |
| Details | <input type="checkbox"/> |
| Management | <input type="checkbox"/> |

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

User passwords expire in: 90 days

Enforce password history: 3 passwords remembered

This screenshot shows the 'Profiles' management screen in the Salesforce setup. It displays several sections: 'Contact Point Consents' (with checkboxes for Read, Create, Edit, Delete, View All, and Modify All), 'Streaming Channels' (with checkboxes for Read, Create, Edit, Delete, View All, and Modify All), and 'Custom Object Permissions' for objects like Bank, College, Customer, Department, Details, and Management. Below these are 'Session Settings' (session times out after 2 hours) and 'Password Policies' (user passwords expire in 90 days and enforce 3 password history). The left sidebar shows various setup categories like Users, Data, and Marketing.

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

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

Cloud Search Setup

Setup Home Object Manager

User

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Datacom

Prospector Users

Service

Embedded Service

Messaging for In-App and Web User

SETUP Users

New User

User Edit Save Save & New Cancel

General Information

First Name manager

Last Name bank

Alias mbank

Email managerbank@gmail.com

Username managerbank@gmail.com

Nickname User1697625040398307733

Title

Company

Department

Division

Role <None Specified>

User License Partner App Subscription

Profile Partner App Subscription User

Active

Marketing User

Offline User

Knowledge User

Flow User

Service Cloud User

Site.com Contributor User

Site.com Publisher User

WCC User

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

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

Cloud Search Setup

Setup Home Object Manager

prof

Users

Profiles

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

SETUP Profiles

Sales Manager

Profile Edit Save Save & New Cancel

Name Sales Manager

User License Salesforce Platform

Description

Custom Profile

Custom App Settings

Analytics Studio (standard_analytics) Visible Default

App Launcher (standard_AppLauncher) Visible Default

My-app (Myapp) Visible Default

Platform (standard_Platform) Visible Default

WCC (standard_Work) Visible Default

Service Provider Access

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

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

Cloud Search Setup Home Object Manager

Profiles

Contact Point Addresses Contact Point Consents Contact Point Emails Sellers Streaming Channels User External Credentials

Custom Object Permissions

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

Session Settings Session Times Out After: 2 hours of inactivity Session Security Level Required at Login: None

Password Policies User passwords expire in: 90 days

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

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

Cloud Search Setup Home Object Manager

New User

User Edit Save Save & New Cancel Help for this Page

General Information

| | |
|---|---|
| First Name: manager | Role: <None Specified> |
| Last Name: sales | User License: Partner App Subscription |
| Alias: msale | Profile: Partner App Subscription User |
| Email: managementsales.123@gmail.com | Active: <input checked="" type="checkbox"/> |
| Username: managementsales.123@gmail.com | Marketing User: <input type="checkbox"/> |
| Nickname: User1697625227951209885 | Offline User: <input type="checkbox"/> |
| Title: | Knowledge User: <input type="checkbox"/> |
| Company: | Flow User: <input type="checkbox"/> |
| Division: | Service Cloud User: <input type="checkbox"/> |
| | Site.com Contributor User: <input type="checkbox"/> |
| | Site.com Publisher User: <input type="checkbox"/> |
| | WDC User: <input type="checkbox"/> |

Setup Home Object Manager

Permission Sets

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

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

Setup Home Object Manager

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Permission Set Overview

| | |
|--------------------------------|------------------|
| Description | API Name |
| Session Activation Required | Namespace Prefix |
| Permission Set Groups Added To | Created By |
| | Last Modified By |

Apps

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

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

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

Search Setup

Setup Home Object Manager

Q. per

Hyperfase Assistant

Lightning Experience Transition Assistant

Users

Permission Set Groups

Permission Sets

Feature Settings

Digital Experiences

Settings Functions

Sales

Accounts

Person Accounts

Salesforce Scheduler

Assignment Policies

Salesforce Scheduler

SETUP

Permission Sets

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

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

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Users

Permission Set Groups

Permission Sets

Custom Code

Custom Permissions

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

All Users ▾

1 item selected

| Full Name | Alias | Username | Role | Active | Profile |
|------------------|---------|---|----------------|-------------------------------------|----------------------------------|
| Chatter Expert | Chatter | chatty.00d5j00000cirhdean.1nmr7ihtz46o@chatter.salesforce.com | Marketing Team | <input checked="" type="checkbox"/> | Chatter Free User |
| consumer 1 | c1 | consumer1.aa@gmail.com | Marketing Team | <input checked="" type="checkbox"/> | consumer |
| Integration User | integ | integration@00d5j00000cirhdean.com | Marketing Team | <input checked="" type="checkbox"/> | Analytics Cloud Integration User |
| Manager 1 | m1 | managerman1@gmail.com | Marketing Team | <input checked="" type="checkbox"/> | Manager |
| Manager 2 | m2 | managerman12@gmail.com | Marketing Team | <input checked="" type="checkbox"/> | Solution Manager |
| Manibharathi G | MG | manibharathi@praveen.com | Marketing Team | <input checked="" type="checkbox"/> | System Administrator |
| provider 1 | p1 | provider.aa@gmail.com | Marketing Team | <input checked="" type="checkbox"/> | provider |
| Security User | sec | insightssecurity@00d5j00000cirhdean.com | Marketing Team | <input checked="" type="checkbox"/> | Analytics Cloud Security User |

Cancel Next

