

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.

WhatsApp | New Custom Object | Sales | +

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

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

Setup | Home | Object Manager

SETUP 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. [Test our concept](#) [Don't show this message again](#)

Custom Object Definition Edit

Save Save & New Cancel

Custom Object Information

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

Label Example: Account

Plural Label Example: Accounts

Starts with vowel sound ☐

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

Object Name Example: Account

Description

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

Content Name

Enter Record Name Label and Format

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

Record Name Example: Account Name

WhatsApp | New Custom Object | Sales | +

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

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

Setup | Home | Object Manager

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

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

Label Example: Account

Plural Label Example: Accounts

Starts with vowel sound ☐

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

Object Name Example: Account

Description

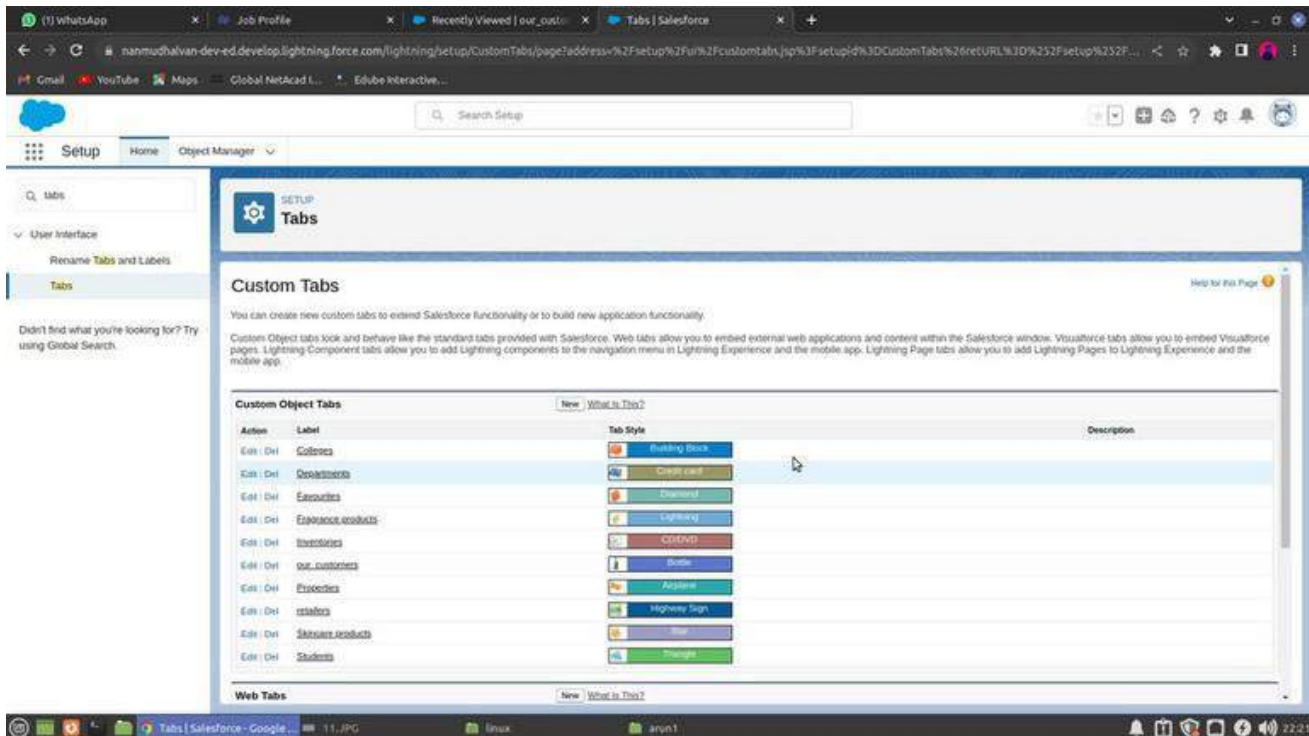
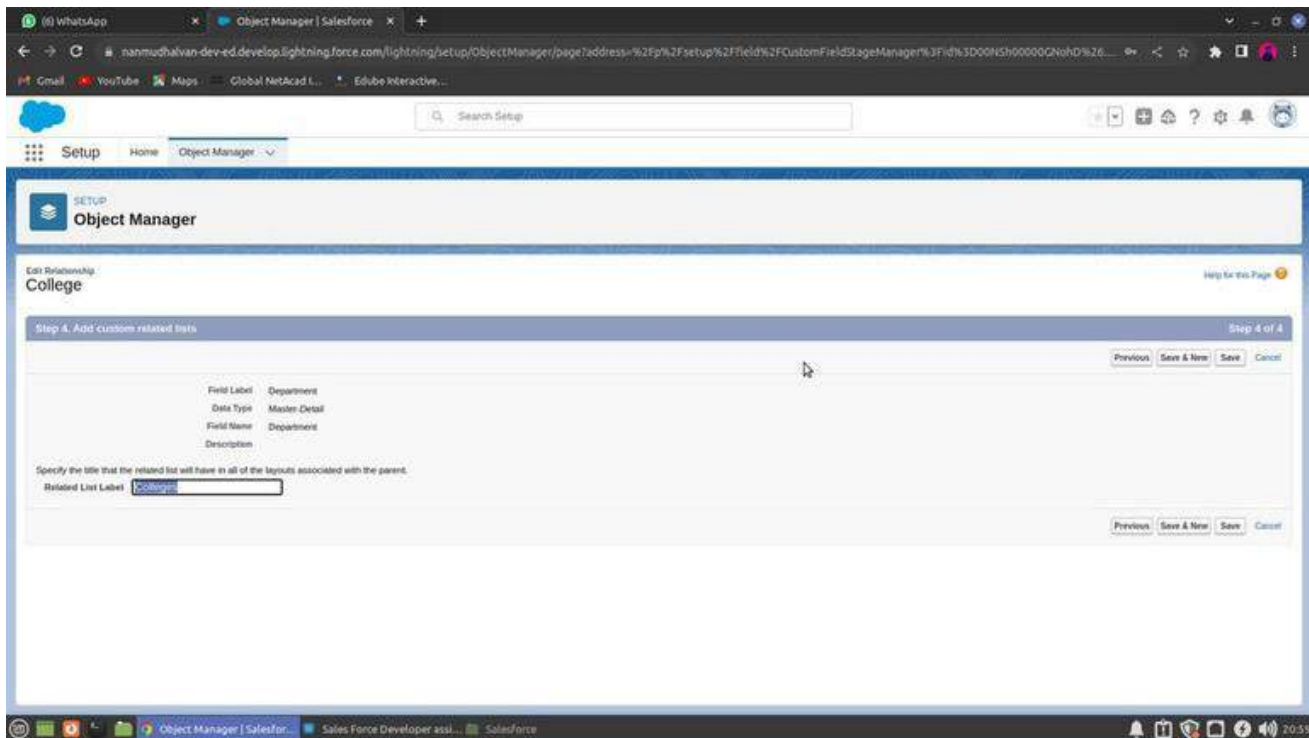
Context Sensitive Help Setting ☒ Open the standard Salesforce.com Help & Training window ☐ Open a window using a Visualforce page

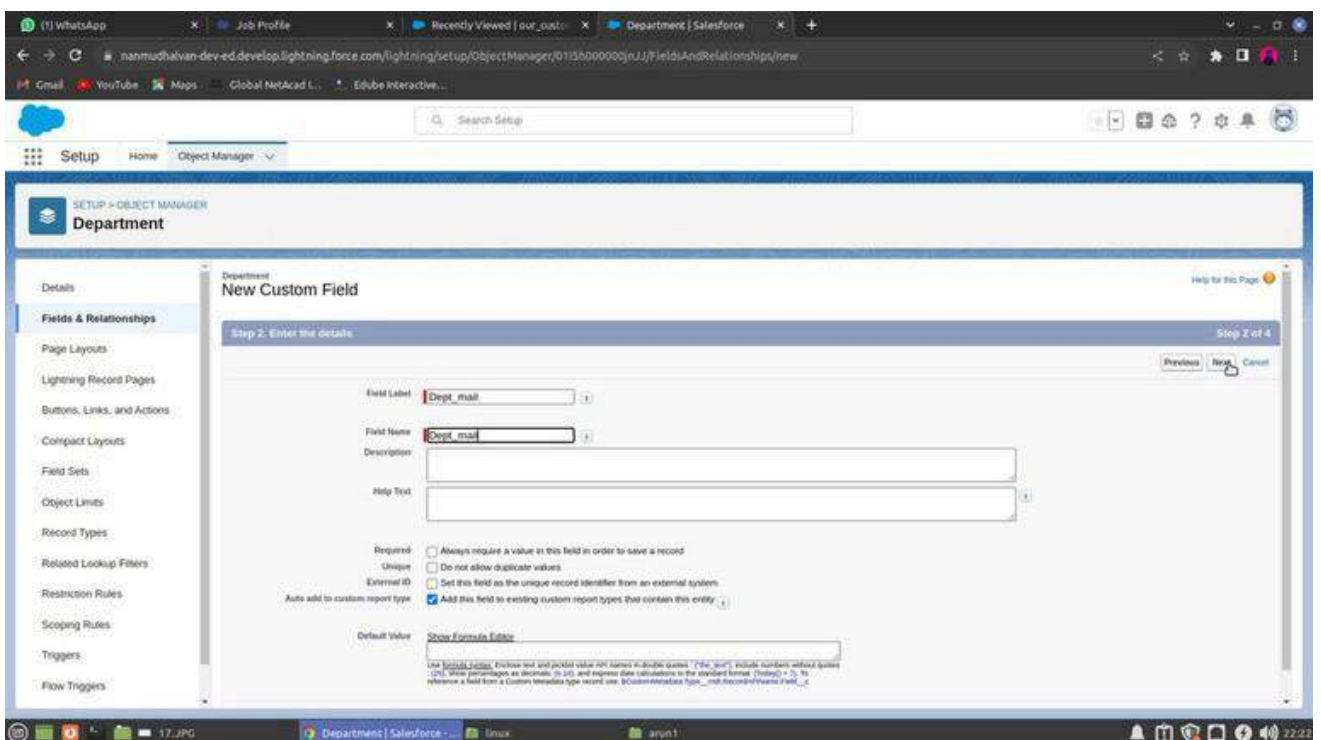
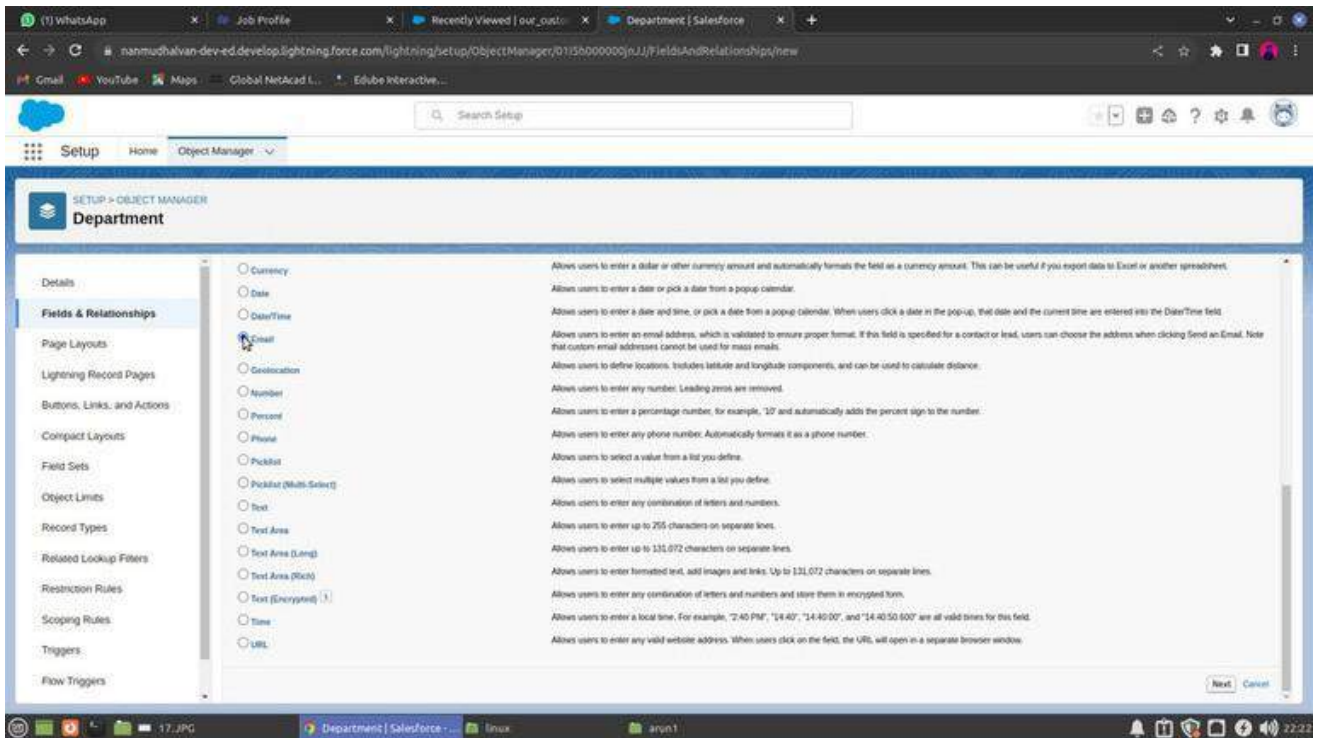
Content Name

Enter Record Name Label and Format

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

Record Name Example: Account Name





Setup > OBJECT MANAGER
Department

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

☐ Currency
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.

☐ Text Area
Allows users to enter up to 255 characters on separate lines.

☐ Text Area (Long)
Allows users to enter up to 131,072 characters on separate lines.

☐ Text Area (Rich)
Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.

☐ Text (Encrypted)
Allows users to enter any combination of letters and numbers and store them in encrypted form.

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

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

17.JPG Department | Salesforce | Linux arn1 22:23

Setup > OBJECT MANAGER
Department

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Department
New Custom Field

Step 2 of 4

Field Label Dept_No

Field Name Dept_No

Description

Help Text

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

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

Default Value Show Formula Editor

Use formulas to create, combine text and picklist values, roll up summary fields, and more. For example, "Rollup_Summary_Field__c" or "Rollup_Summary_Field__c" to reference a field from a Custom Metadata type record, "Rollup_Summary_Field__c".

Previous Next Cancel

Waiting for namudhalvan-dev-ed.my.salesforce.com... 17.JPG Department | Salesforce | Linux arn1 22:23

Setup > OBJECT MANAGER
Department

Details

Fields & Relationships

7 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Department Name	Name	Text(20)		✓
Dept_email	Dept_email__c	Email		
Dept_No	Dept_No__c	Phone		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Total_Count	Total_Count__c	Roll-Up Summary (COUNT College)		

Setup > OBJECT MANAGER
Department

Details

Fields & Relationships

Full Screen Step

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

Data Type

☐ None Selected

Select one of the data types below.

☐ Auto Number

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

☐ Formula

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

☐ Roll-Up Summary

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

☐ Lookup Relationship

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

☒ Master-Detail Relationship

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

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

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

☐ External Lookup Relationship

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

Setup Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Department

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

New Relationship

Step 6. Add custom related lists

Step 6 of 6

Previous Save & New Save Cancel

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

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

Related List Label

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
<input checked="" type="checkbox"/>	College Layout

☒ Append related list to users' existing personal customizations

Previous Save & New Save Cancel

Setup Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

College

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Data Type

Select one of the data types below.

- ☐ None Selected
- ☐ Auto Number

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

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

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

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

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

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

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

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

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

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



The screenshot shows the 'Fields & Relationships' section of the 'College' object in Salesforce Setup. The left sidebar contains 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, and Search Layouts. The main content area displays a table of fields for the 'College' object, sorted by Field Label. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The fields listed are: College Name (Text(80), indexed), Created By (Lookup(User)), Last Modified By (Lookup(User)), Owner (Lookup(User:Group), indexed), and Total Count (Roll-Up Summary (COUNT Department)).

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)		

Search Setup

Apps

User Info

App

Didn't find what you were looking for?

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 [?]
Name your app...

*Developer Name [?]
Enter a developer name...

Description [?]
Enter a description...

App Branding

Image [?]

Upload

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

Next

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

Search Setup

Apps

User Info

App

Didn't find what you were looking for?

New Lightning App

App Details & Branding

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

App Details

*App Name [?]
My_College

*Developer Name [?]
My_College

Description [?]
Enter a description...

App Branding

Image [?]

Upload

Primary Color Hex Value [?]

#007002

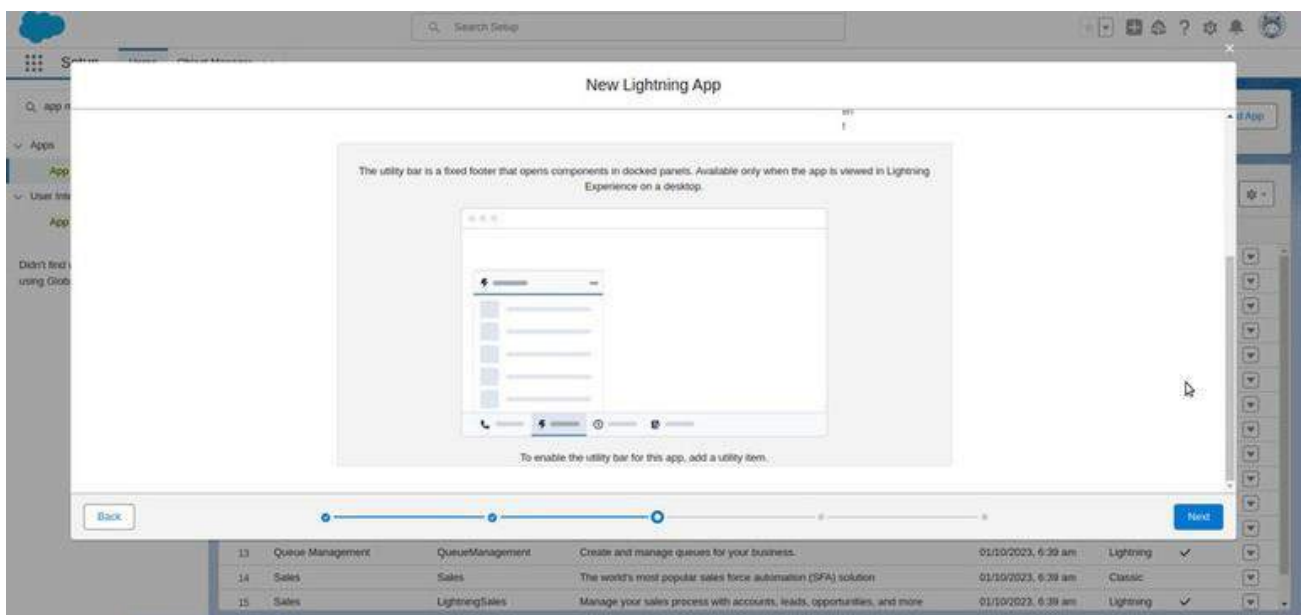
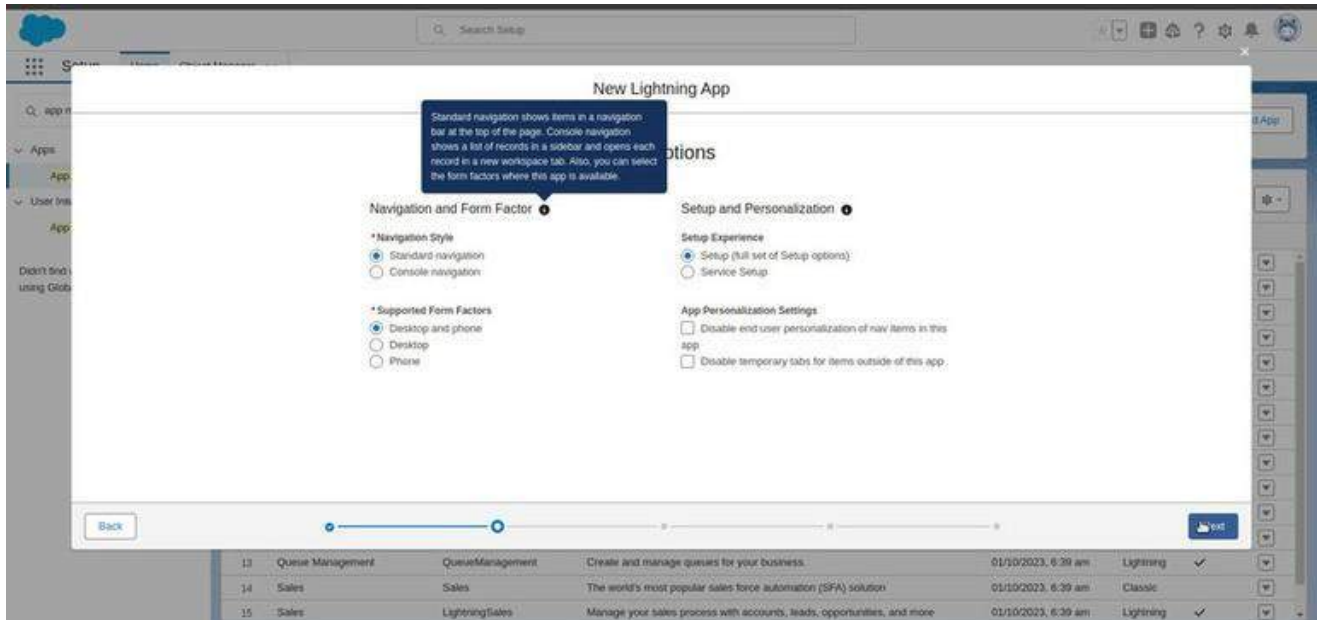
Org Theme Options

☐ Use the app's image and color instead of the org's custom theme

App Launcher Preview

Next

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



The screenshot displays the Salesforce App Builder interface. A modal window titled "New Lightning App" is open, showing a search bar with the text "sy" and a list of "Selected Pages" including "System Administrator". Below the search bar, there is a section for "Selected Pages" with a list of pages. A "Save & Finish" button is visible at the bottom right of the modal. The background shows the Salesforce App Manager with a table of existing apps.

ID	Name	Page Layout	Description	Created At	Theme	Status
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	✓

colleges

Recently Viewed

0 items • Updated a few seconds ago

college Name

New

Import

Change Owner

New college

* = Required Information

Information

* college Name

AVS Engineering college

Owner

SATHISH KUMAR S

Cancel

Save & New

Save

Service

HomeChatterAccountsContactsCasesReportsDashboardscollegesdepartmentsDetailsProvidersConsumersManagements

Search...

12

college

AVS Engineering college

New ContactEditNew Opportunity

Related

Details

college Name

AVS Engineering college

Owner

SATHISH KUMAR S

Total count

0

Created By

SATHISH KUMAR S, 28/10/2023, 6:37 pm

Last Modified By

SATHISH KUMAR S, 28/10/2023, 6:37 pm

departments

Recently Viewed

0 items • Updated a few seconds ago

department Name

New

Import

New department

* - Required Information

Information


* department Name

CSE

* college

AVS Engineering college

CancelSave & NewSave



★

+

🔍

?

⚙️

12

Service

HomeChatterAccountsContactsCasesReportsDashboardscollegesdepartmentsDetailsProvidersConsumersManagements

college

AVS Engineering college

New ContactEditNew Opportunity

Related

Details

college Name

AVS Engineering college

Total count

1

Created By

SATHISH KUMAR S. 28/10/2023, 6:37 pm

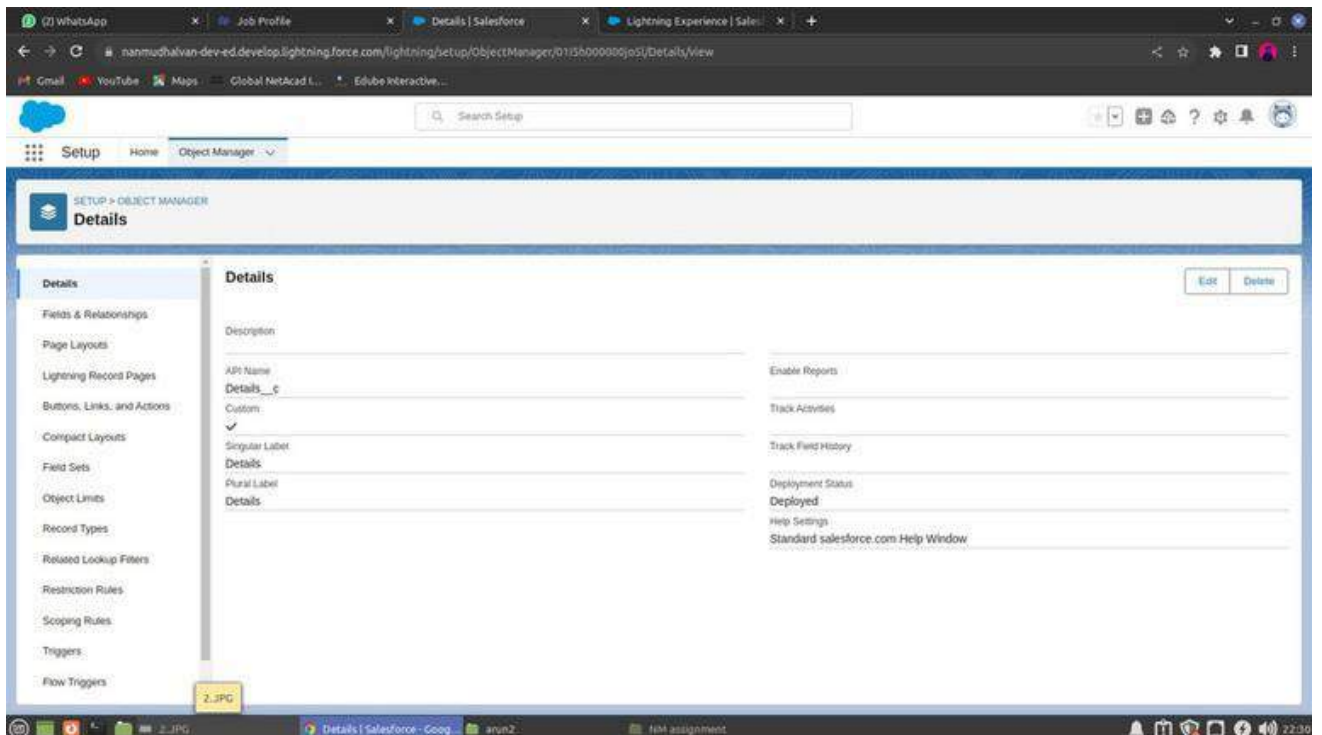
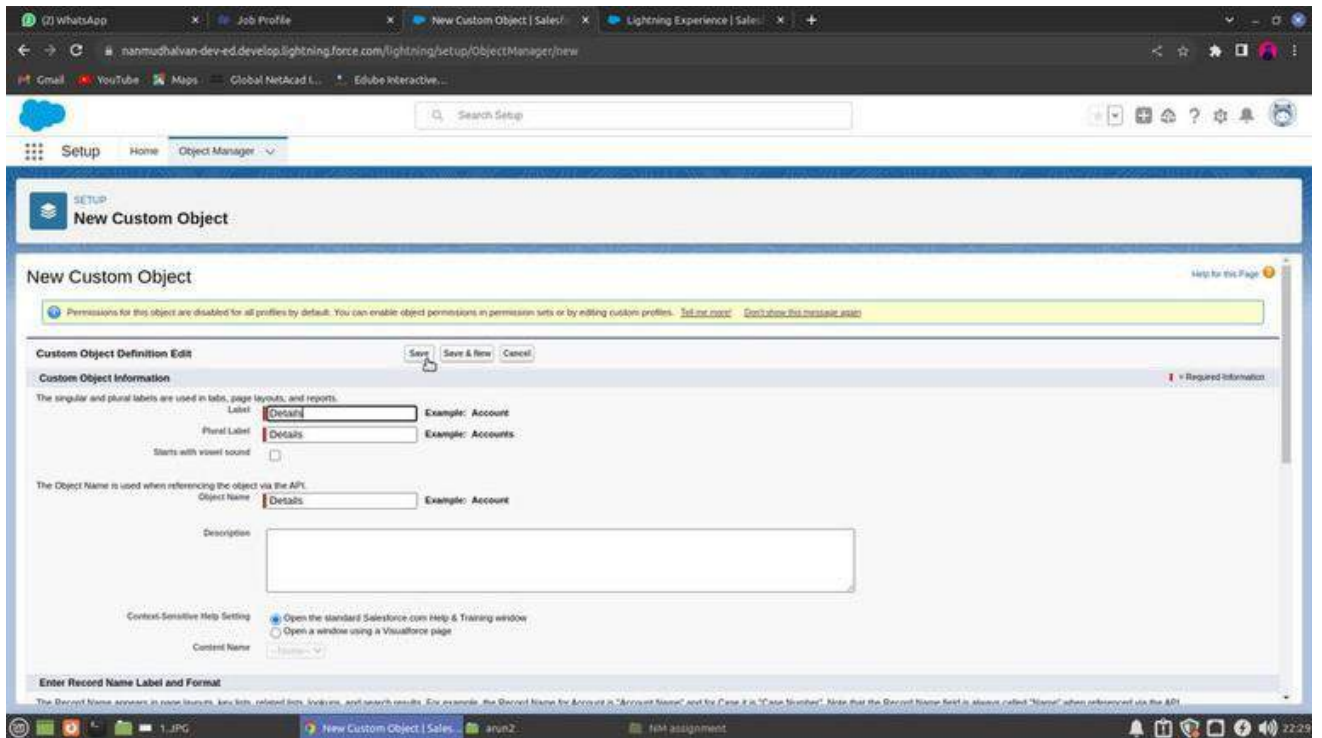
Owner

SATHISH KUMAR S

Last Modified By

SATHISH KUMAR S. 28/10/2023, 6:37 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.



Setup > OBJECT MANAGER
Details

Fields & Relationships
4 Items, Sorted by Field Label

Quick Find: New Deleted Fields Field Dependencies Set History Tracking

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

Details

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

Setup > OBJECT MANAGER
Details

Fields & Relationships

- ☐ Lookup Relationship
Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
- ☐ Master-Detail Relationship
Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:
 - The relationship field is required on all detail records.
 - The ownership and sharing of a detail record are determined by the master record.
 - When a user deletes the master record, all detail records are deleted.
 - You can create rollup summary fields on the master record to summarize the detail records.
 The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.
- ☐ External Lookup Relationship
Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.
- ☐ Checkbox
Allows users to select a True (checked) or False (unchecked) value.
- ☐ Currency
Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
- ☐ Date
Allows users to enter a date or pick a date from a popup calendar.
- ☐ 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.

Setup > OBJECT MANAGER

Details

Details

Fields & Relationships

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Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

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Restriction Rules

Scoping Rules

Triggers

Flow Triggers

New Custom Field

Step 2: Enter the details

Field Label: Mail

Field Name: Mail

Description:

Help Text:

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

Unique: ☐ Do not allow duplicate values

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

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

Default Value: [Show Formula Editor](#)

Use formula to create, enforce text and picklist value not names in double quotes ("the name"), include numbers without quotes (25), show percentages as decimals (0.5), and express date calculations in the standard format (Today+10). To reference a field from a Custom Metadata type record use: {CustomMetadataType__mdt.RecordNameField__c}

Previous Next Cancel

Setup > OBJECT MANAGER

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Details

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Flow Triggers

New Custom Field

Step 4: Add to page layouts

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

Setup > OBJECT MANAGER

Details

Details

Fields & Relationships

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Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Currency

Date

DateTime

Email

Geolocation

Number

Percent

Phone

Picklist

Picklist (Multi-Select)

Text

Text Area

Text Area (Long)

Text Area (Rich)

Text (Encrypted)

Time

URL

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

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

Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the 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 URL will open in a separate browser window.

Next Cancel

Setup > OBJECT MANAGER

Details

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

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Restriction Rules

Scoping Rules

Triggers

Flow Triggers

New Custom Field

Step 2. Enter the details

Field Label: Phone

Field Name: phone

Description:

Help Text:

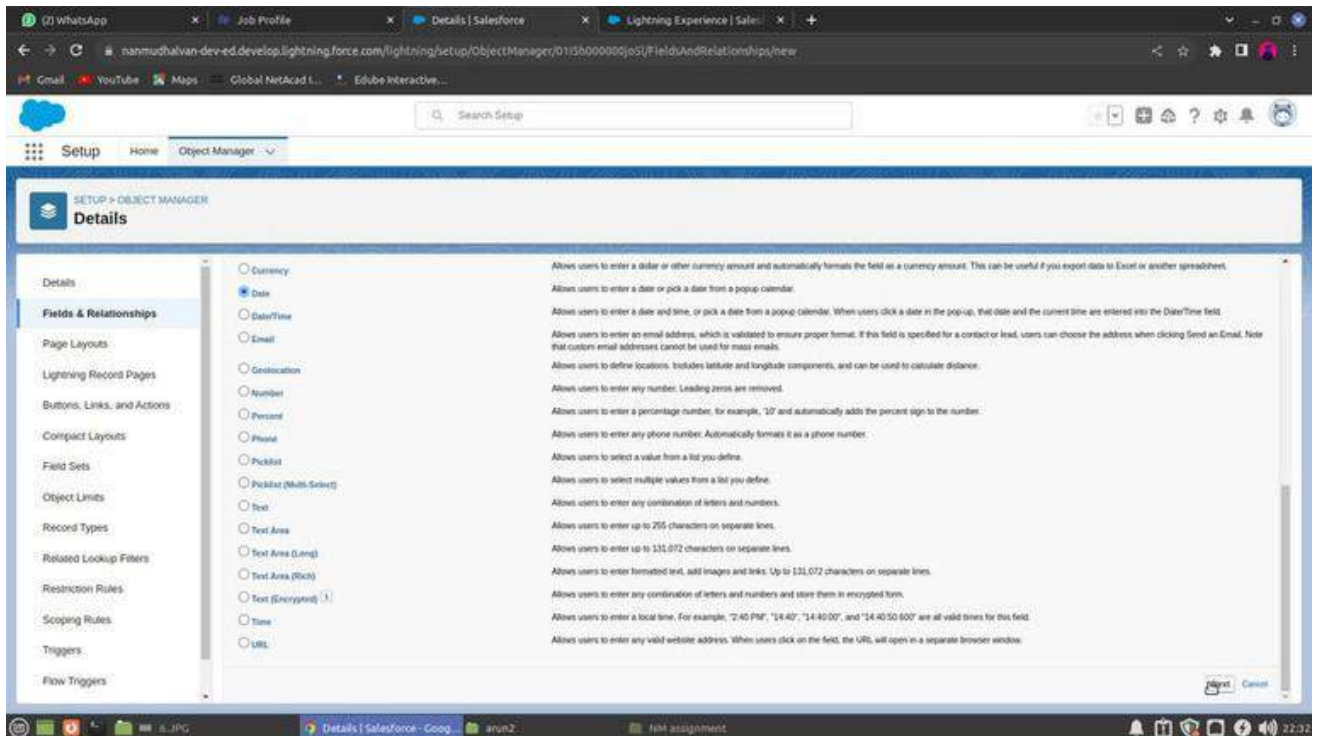
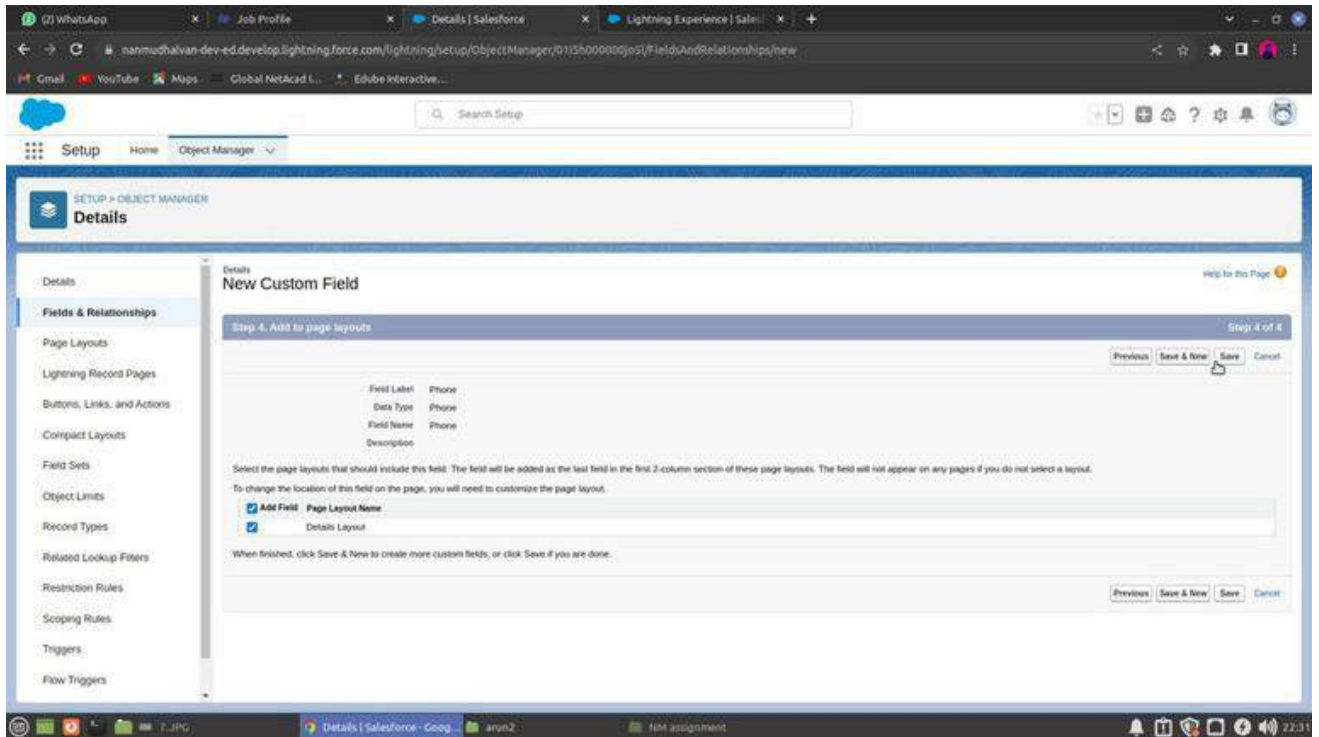
Required: ☐ Always require a value in this field in order to save a record

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

Default Value: Show Formula Editor

Use formulas to create, combine text and picklist values, roll up values in double quotes ("file.txt"), include numbers without quotes (123). Enter percentages as decimals (0.12), and express date calculations in the standard format: Today() + 5. To reference a field from a Custom Metadata type record use: \$CustomMetadata.Type__c.RecordInstance.Field__c

Previous Next Cancel



Setup > OBJECT MANAGER

Details

Details

Step 2: Enter the details

Field Label:

Field Name:

Description:

Help Text:

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

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

Default Value:

Use formula syntax. Enclose text and quoted values in double quotes (" "). Include numbers without quotes. Use formulas to calculate values. To reference a field from a custom metadata type record, use: {CustomMetadataType__c}. To reference a field from a custom metadata type record, use: {CustomMetadataType__c}.

Previous Next Cancel

Setup > OBJECT MANAGER

Details

Details

Step 4: Add to page layouts

Field Label	Date
Date 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.

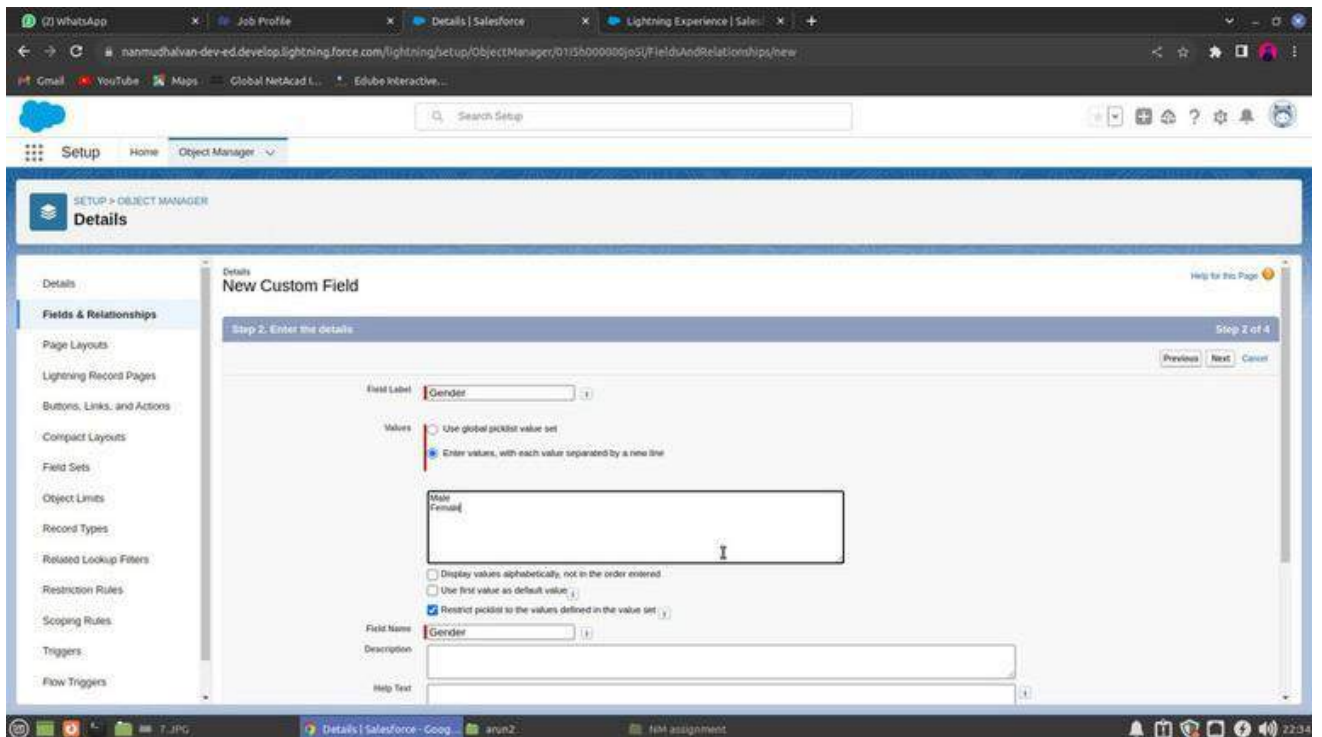
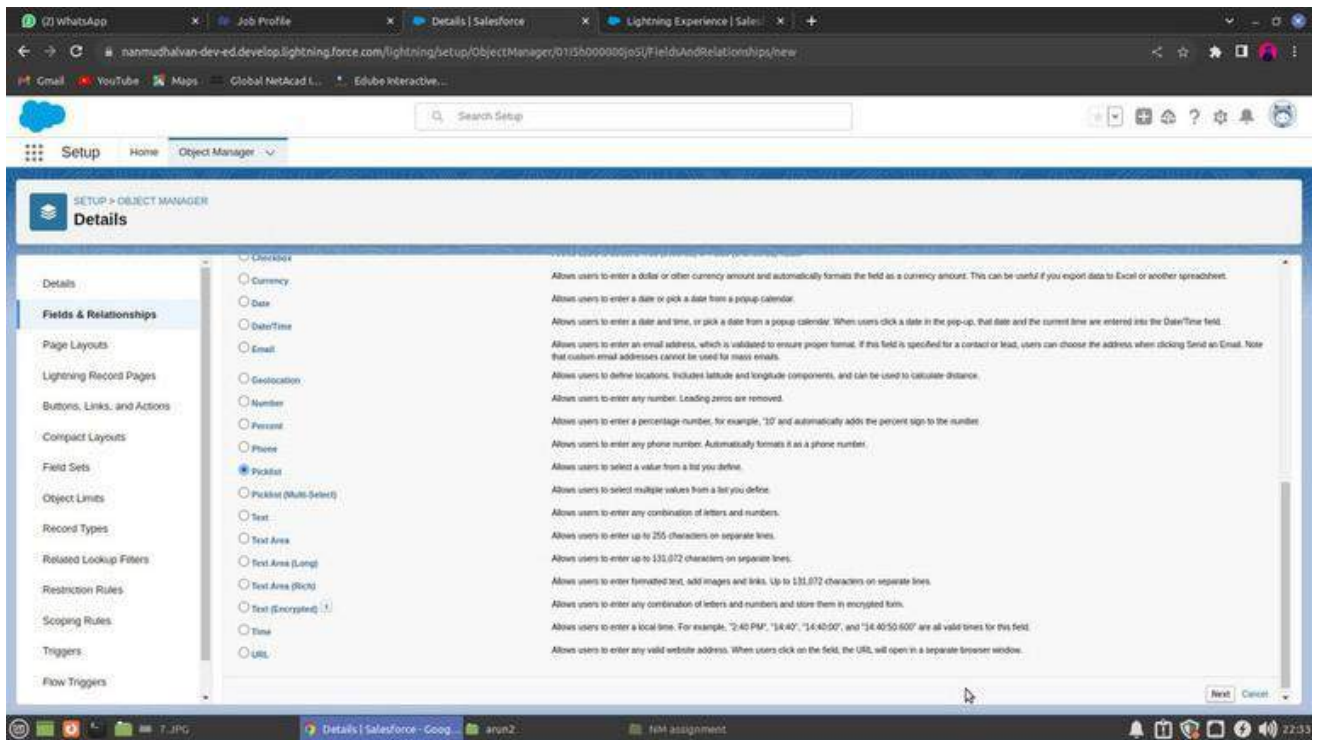
To change the location of this field on the page, you will need to customize the page layout.

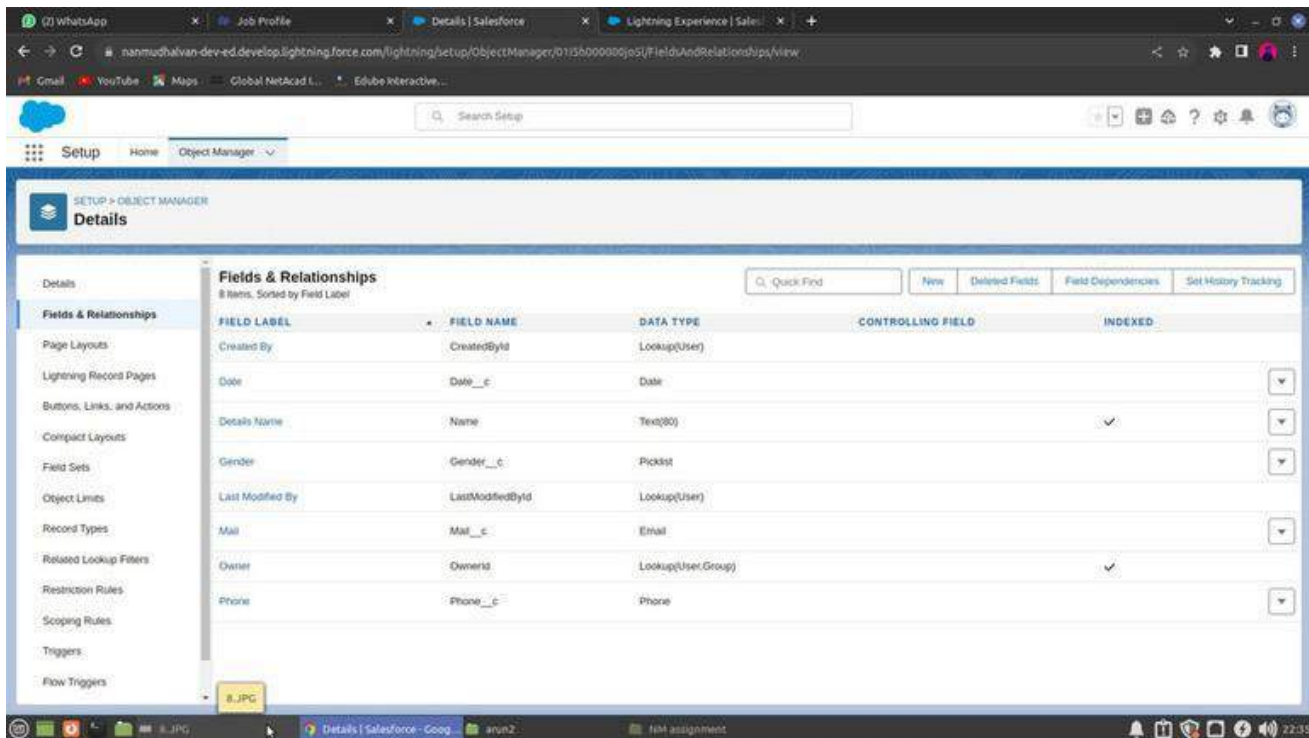
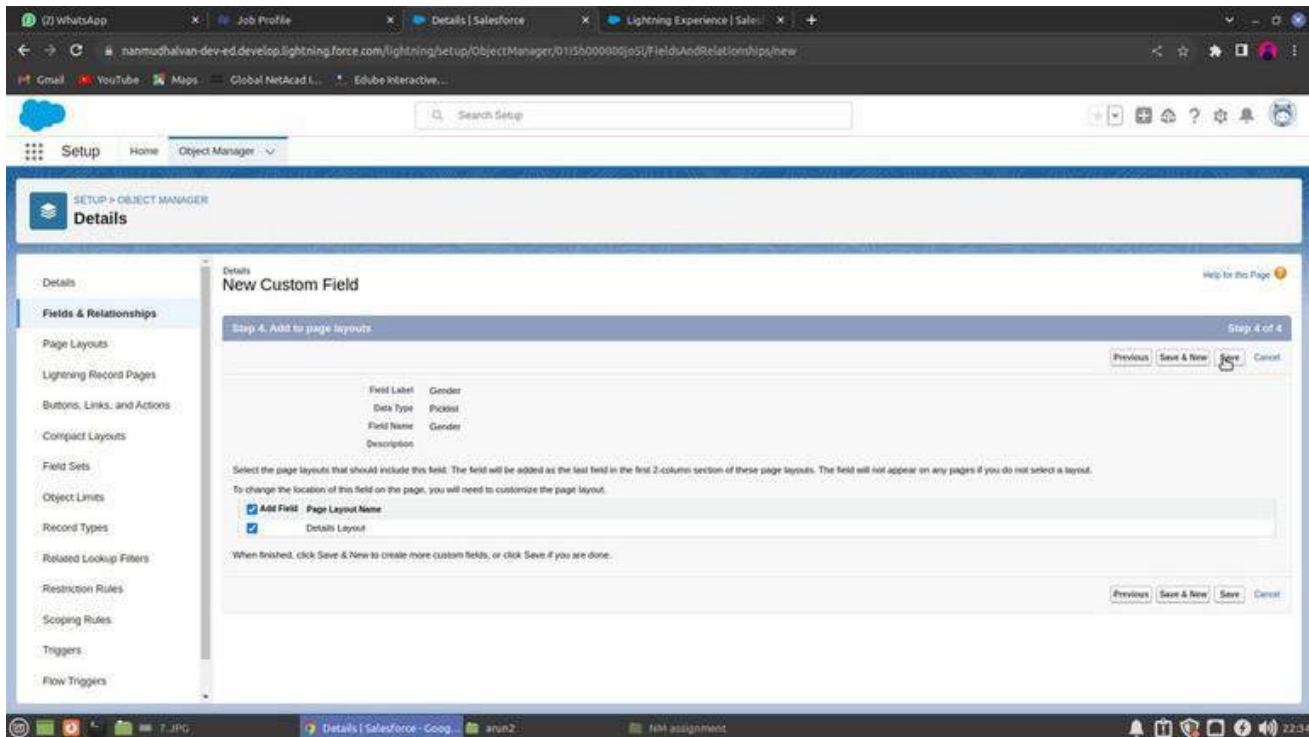
☒ Add Field

☒ Details Layout

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

Previous Save & New Save Cancel





Setup

Search Setup

Flow Trigger Explorer New Flow

Flow Definitions

All Flows

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

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

New Flow

Core All Templates

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

Record-Triggered Flow
Launches when a record is created, updated, or deleted. This autolaunched flow runs in the background.

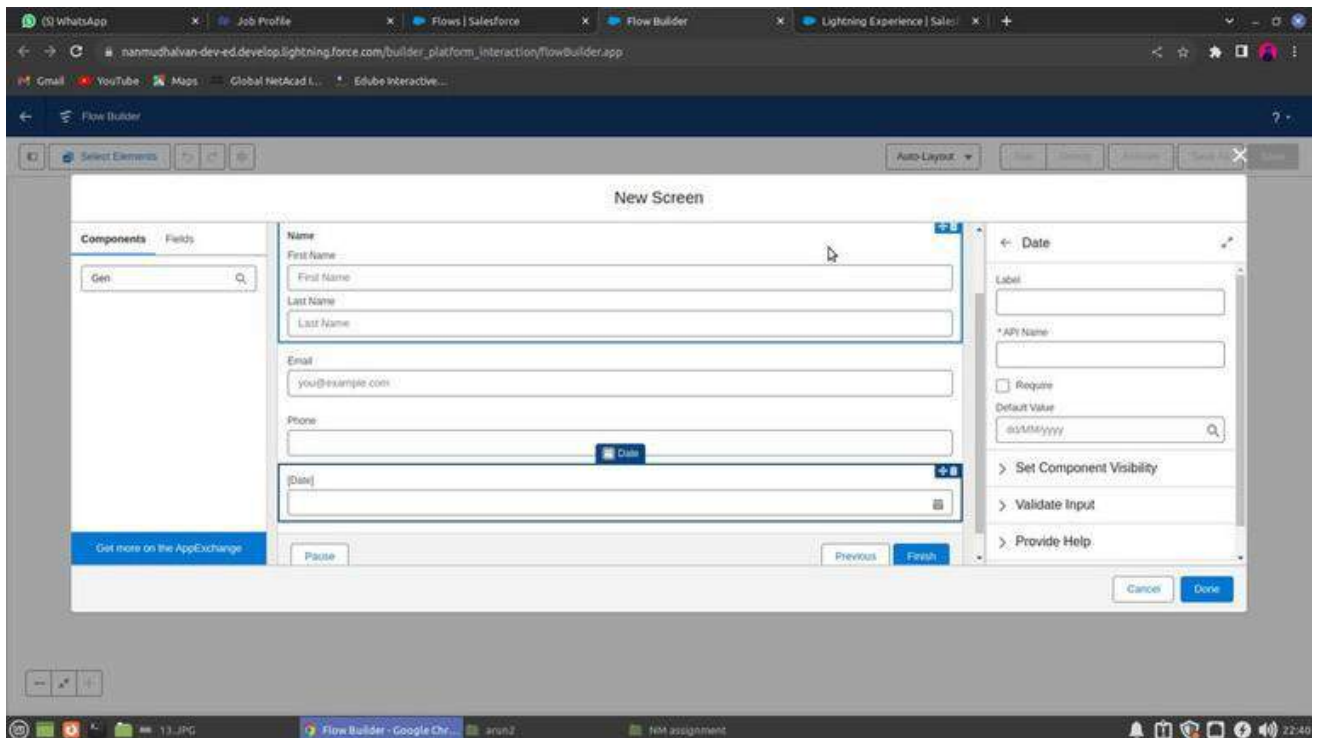
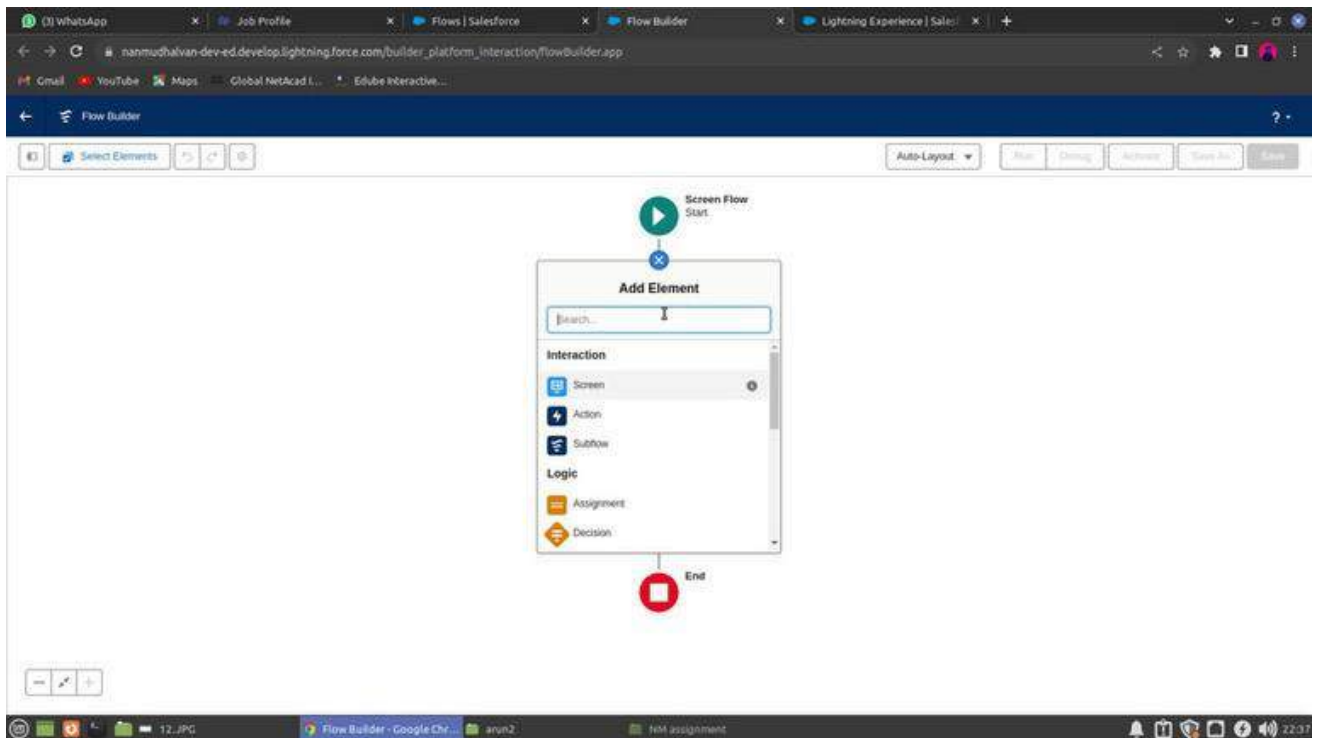
Schedule-Triggered Flow
Launches at a specified time and frequency for each record in a batch. This autolaunched flow runs in the background.

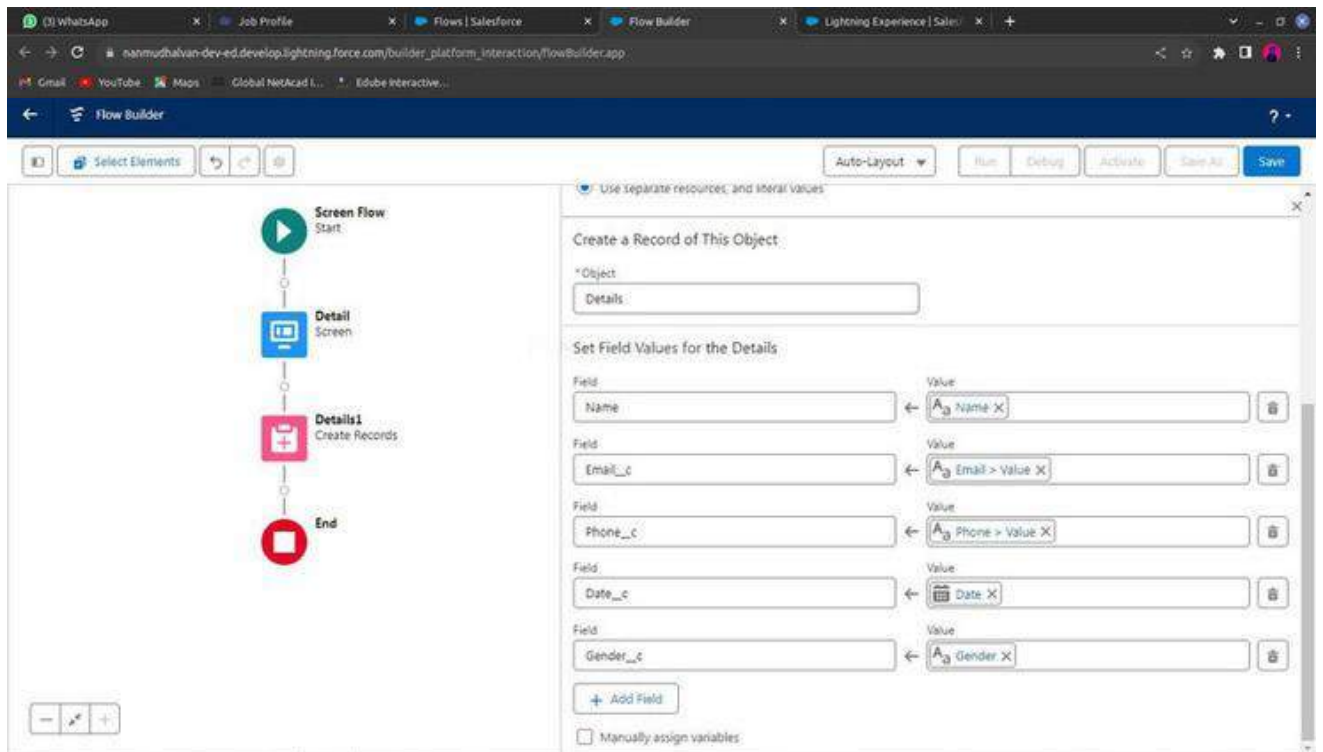
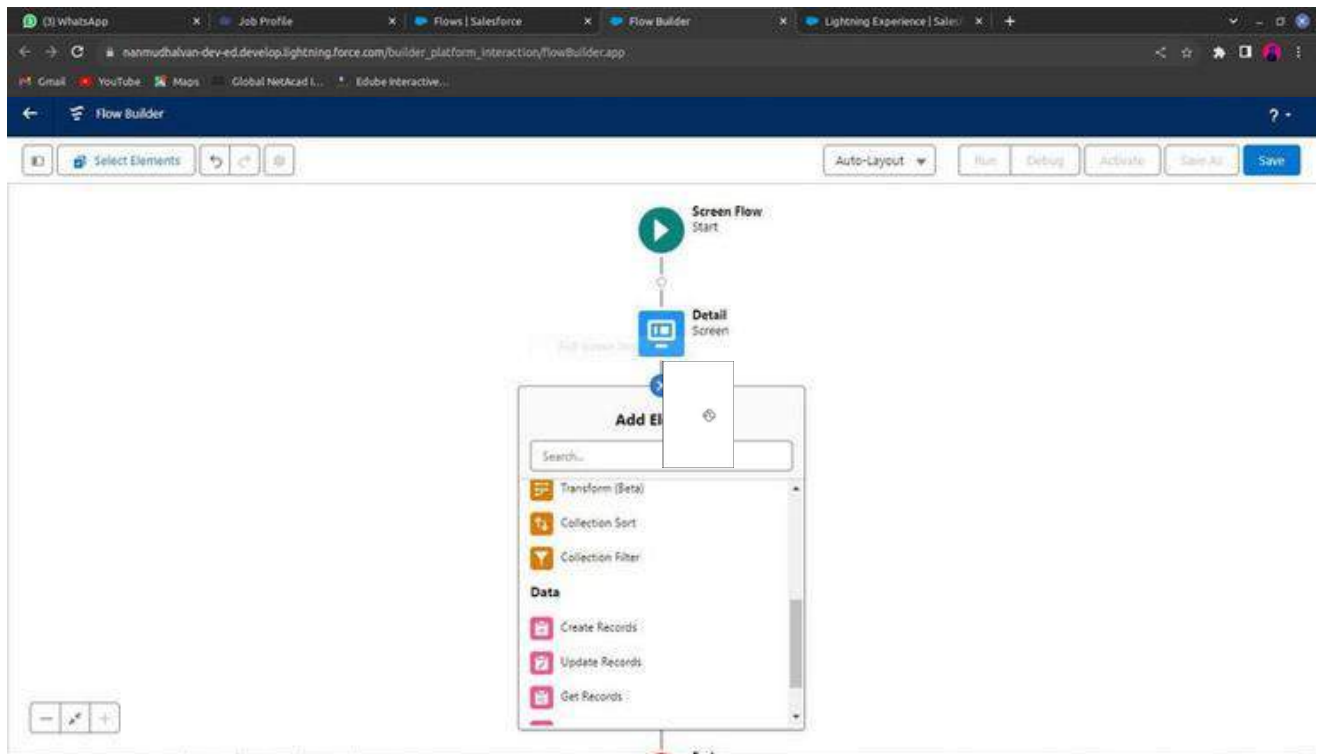
Platform Event—Triggered Flow
Launches when a platform event message is received. This autolaunched flow runs in the background.

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

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

Create








details


Name	sathishkumar
Email	sathishk2003@gmail.com
Phone	6369914154
Date	22-Sept-2002
Gender	male


Next




















Service

Home

Chatter

Accounts

Contacts

Cases

Reports

Dashboards

colleges


departments

Details

Providers

Consumers

Managements

 Details

sathishkumar

New Contact

Edit

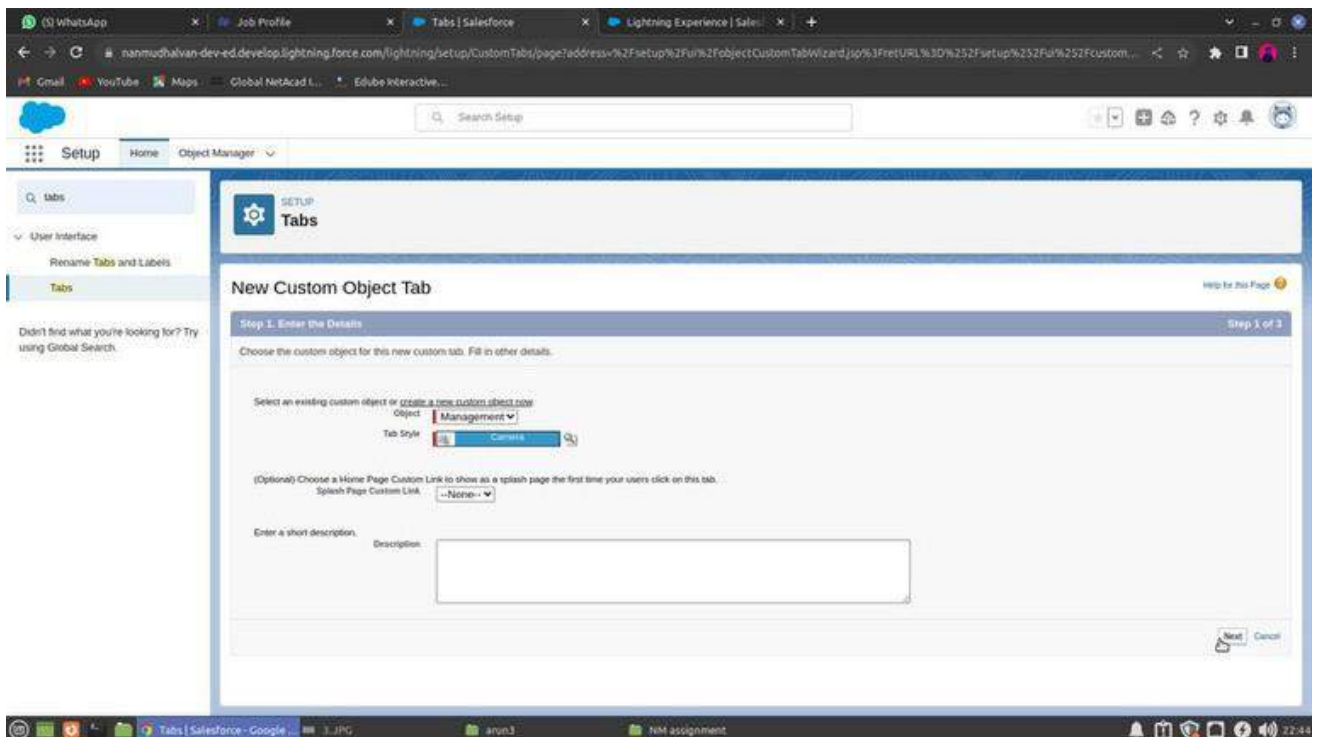
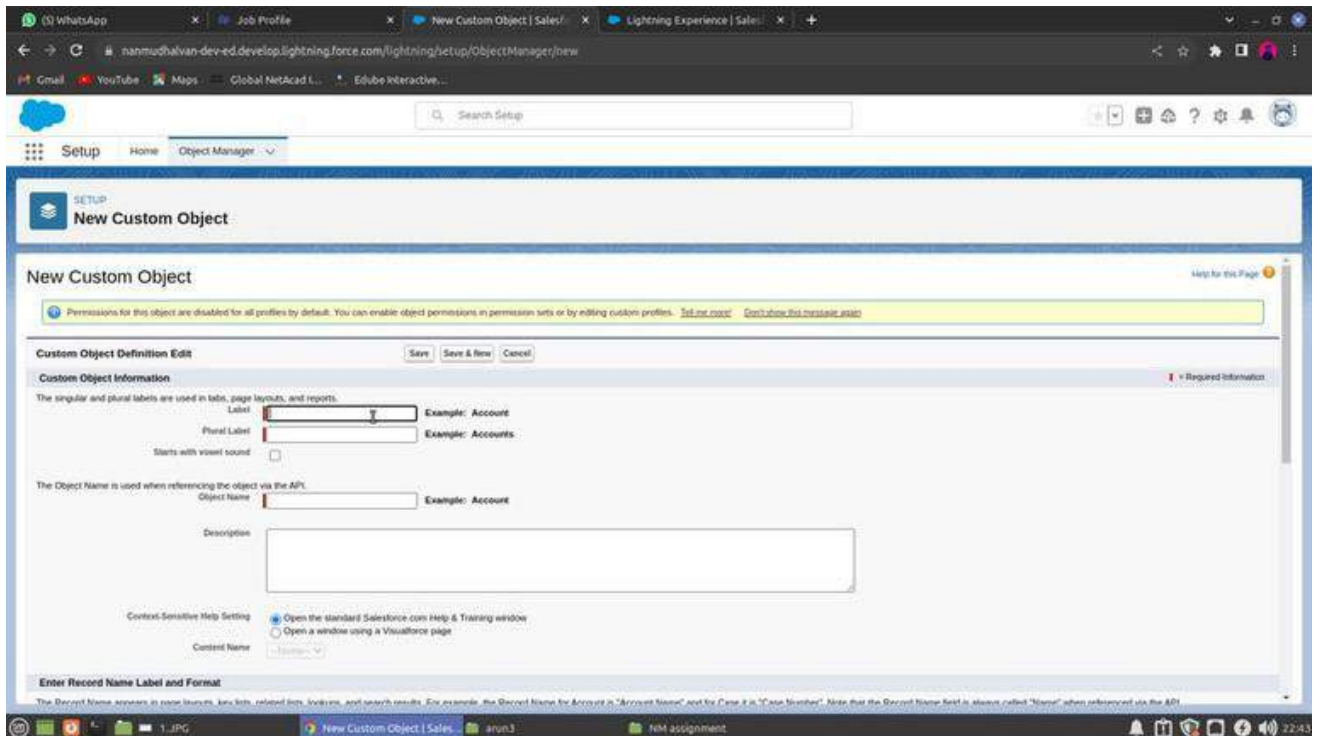
New Opportunity

Related

Details

Name	sathishkumar	Owner	SATHISH KUMAR S
Email	sathishk2003@gmail.com		
Phone	6369914154		
Date	22/09/2002		
Gender	Male		
Created By	SATHISH KUMAR S, 28/10/2023, 6:50 pm	Last Modified By	SATHISH KUMAR S, 28/10/2023, 6:50 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.



Setup | Home | Object Manager

Search Setup

Setup Tabs

Import Lightning components and other your custom Lightning components to the navigation layout in Lightning Experience and mobile app. Lightning Experience will automatically import the Lightning components to the mobile app.

Custom Object Tabs

New | What is This?

Action	Label	Tab Style	Description
Edit Del	Colleges	Bulking Block	
Edit Del	Departments	Credit Card	
Edit Del	Details	Lightning	
Edit Del	Experiences	Shannon	
Edit Del	Experiences available	Lightning	
Edit Del	Inventories	CCO/DMS	
Edit Del	Managements	Camera	
Edit Del	our customers	Route	
Edit Del	Procedures	Apparel	
Edit Del	relations	Highway Sign	
Edit Del	Skincare products	Real	
Edit Del	Students	Trainer	

Web Tabs

New | What is This?

No Web Tabs have been defined.

My-app | Recently Viewed | College | Department | Details | Management

Management

Recently Viewed

0 items • Updated a few seconds ago

Management Name

New | Import | Change Owner

Full screen help

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

Setup Home Object Manager

Search Setup

Hyperforce Assistant

Users

Profiles

Data

Mass Transfer Approval Requests

Feature Settings

Data.com

Prospector Preferences

Prospector Users

Functions

Marketing

Lead Processes

Sales

Products

Asset Settings

SETUP Profiles

Profiles

All Profiles Edit Delete Create New View

New Profile

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

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Products

Asset Settings

SETUP Profiles

Profile Edit Manager

Set the permissions and page layouts for this profile.

Profile Edit Save Save & New Cancel

Name Manager

User License Salesforce Platform

Description

Custom Profile ☒

Custom App Settings

Visible Default

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

Service Provider Access

Setup

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Hyperforce Assistant

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Setup Profiles

Contact Point Consents

Contact Point Emails

Streaming Channels

User External Credentials

Custom Object Permissions

	Basic Access				Data Administration	
	Read	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"/>
Department	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Details

Management

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

Setup

Search Setup

Hyperforce Assistant

Users

Profiles

Data

Mass Transfer Approval Requests

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Data.com

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Asset Settings

Setup Profiles

Profile Manager

Profile: Manager

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

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

Learn IP Basics | Enabled Apex Class Access | Enabled Visualforce Page Access | Enabled External Data Source Access | Enabled Named Credential Access | Enabled External Credential Provider Access | Enabled Custom Metadata Type Access | Enabled Custom Settings Definition Access | Enabled Flow Access | Enabled Service Presence Status Access | Enabled Custom Permissions

Profile Detail

Name: Manager

User License: Salesforce Platform

Description:

Created By: Admin | 10/10/2023, 3:47 pm

Modified By: Admin | 10/10/2023, 3:48 pm

Page Layouts

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

Browser tabs: (3) WhatsApp, Job Profile, Flows | Salesforce, Flow Builder, Lightning Experience | Sales.

Address bar: na1mudhalvan-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.app

Search Setup:

Setup Home Object Manager

Search:

Users

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

Feature Settings

- Data.com
- Prospector Users
- Service
- Embedded Service
- Messaging for In-App and Web User

SETUP Users

New User

Help for this Page

User Edit

General Information

First Name: Role: Required Information

Last Name: User License:

Alias: Profile:

Email: Active: ☒

Username: Marketing User: ☐

Nickname: Offline User: ☐

Title: Knowledge User: ☐

Company: Flow User: ☐

Department: Service Cloud User: ☐

Division: Site.com Contributor User: ☐

Site.com Publisher User: ☐

WDC User: ☐

Browser tabs: (3) WhatsApp, Job Profile, Flows | Salesforce, Flow Builder, Lightning Experience | Sales.

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Search Setup:

Setup Home Object Manager

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Feature Settings

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- Embedded Service
- Messaging for In-App and Web User

SETUP Users

New User

Help for this Page

User Edit

General Information

First Name: Role: Required Information

Last Name: User License:

Alias: Profile:

Email: Active: ☒

Username: Marketing User: ☐

Nickname: Offline User: ☐

Title: Knowledge User: ☐

Company: Flow User: ☐

Department: Service Cloud User: ☐

Division: Site.com Contributor User: ☐

Site.com Publisher User: ☐

WDC User: ☐

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

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

per

Hyperforce Assistant

Lightning Experience Transition Assistant

Users

Permission Set Groups

Permission Sets

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Digital Experiences

Settings

Functions

Sales

Accounts

Person Accounts

Salesforce Scheduler

Assignment Policies

Salesforce Scheduler

SETUP Permission Sets

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

All Permission Sets Edit Delete Create New View

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

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

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Salesforce Scheduler

Assignment Policies

Salesforce Scheduler

SETUP Permission Sets

Permission Set manager12

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

Permission Set Overview

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

Apps

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

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

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

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

Apex Class Access

Browser tabs: (3) WhatsApp, Job Profile, Flows | Salesforce, Flow Builder, Lightning Experience | Sales...

Address bar: nanmudhalvan-dev-ed.develop.lightning.force.com/builder_platform_interaction/FlowBuilder.app

Search Setup

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Salesforce Scheduler

SETUP

Permission Sets

Permission Set: **manager12**

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

Permission Set Overview Object Settings Accounts

Accounts

Save Cancel

Object Permissions

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

Field Permissions

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

Setup Home Object Manager

Search: user

Users

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Queues

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Data.com

Prospector Users

Service

Embedded Service

Messaging for In-App and Web User Verification

User Interface

Action Link Templates

All Users

1 item selected

Search this list...

	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Chatter Expert	Chatter	chatty00d5j00000ciqpaeav.ktx1n04y2af@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	Consumer 5	c5	cons5@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Consumer
<input type="checkbox"/>	Integration User	integ	integration@00d5j00000ciqpaeav.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input checked="" type="checkbox"/>	Manager 1	m1	sathish11@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Manager
<input type="checkbox"/>	Manager 2	m2	manager221@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Solution Manager
<input type="checkbox"/>	Provider 1	p1	sathiskumar100@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Provider
<input type="checkbox"/>	SATHISH KUMAR S	SS	sathishkumar103@gmail.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Security User	sec	insightsecurity@00d5j00000ciqpaeav.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

Cancel Next

Setup Home Object Manager

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Salesforce Scheduler

Select an Expiration Option For Assigned Users

☒ No expiration date

☐ Specify the expiration date

1 Day 1 Week 30 Days 60 Days Custom Date

Time Zone

Select a time zone...

Selected Users

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

Cancel Back Assign

Setup Home Object Manager

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Person Accounts

Salesforce Scheduler

Assignment Policies

Salesforce Scheduler

manager12

Current Assignments

Add Assignment

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

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

Setup Home Object Manager

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. [Get more info](#) [Don't show this message again](#)

Custom Object Definition Edit

Save Save & New Cancel

Custom Object Information

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

Label: Example: Account

Plural Label: Example: Accounts

Starts with vowel sound: ☐

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

Object Name: Example: Account

Description:

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

Content Name:

Enter Record Name Label and Format

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

Setup Home Object Manager

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:

Tab Style:

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

Splash Page Custom Link:

Enter a short description.

Description:

Next Cancel

Browser tabs: (4) WhatsApp, Job Profile, Bank | Salesforce, Lightning Experience | Sales |

Address bar: <https://namudhalvan-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/015b00000507D/Details/view>

Navigation: Setup, Home, Object Manager

Bank

Details

Fields & Relationships

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

Buttons: Edit, Delete

Left sidebar menu: 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

Footer: <https://namudhalvan-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/015b00000507D/Details/view>

Browser tabs: (4) WhatsApp, Job Profile, New Custom Object | Sales |, Lightning Experience | Sales |

Address bar: <https://namudhalvan-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new>

Navigation: Setup, Home, Object Manager

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. [Test me now!](#) [Don't show this message again](#)

Custom Object Definition Edit [Save] [Save & New] [Cancel]

Custom Object Information [Required Information]

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

Label: Example: Account

Plural Label: Example: Accounts

Starts with vowel sound: ☐

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

Object Name: Example: Account

Description:

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

Content Name:

Enter Record Name Label and Format

The Record Name appears in some lists, related lists, indexes, 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.

Browser tabs: (3) WhatsApp, Job Profile, Flows | Salesforce, Flow Builder, Lightning Experience | Sales.

Address bar: namudhalvan-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.app

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

Navigation: Setup, Home, Object Manager

Left Sidebar: 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

Section: SETUP > OBJECT MANAGER Customer

Sub-section: Add custom field

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

Data Type

Select one of the data types below.

- ☐ None Selected
- ☐ Auto Number
 - A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
- ☐ Formula
 - A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
- ☐ Roll-Up Summary
 - A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
- ☐ Lookup Relationship
 - Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
- ☒ Master-Detail Relationship
 - Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:
 - The relationship field is required on all detail records.
 - The ownership and sharing of a detail record are determined by the master record.
 - When a user deletes the master record, all detail records are deleted.
 - You can create roll-up 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.

Browser tabs: (3) WhatsApp, Job Profile, Flows | Salesforce, Flow Builder, Lightning Experience | Sales.

Address bar: namudhalvan-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.app

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

Navigation: Setup, Home, Object Manager

Left Sidebar: 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

Section: SETUP > OBJECT MANAGER Customer

Sub-section: New Relationship

Step 6. Add custom related lists

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

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

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

Add Related List: Page Layout Name
☒ Bank Layout

☒ Append related list to users' existing personal customizations

Buttons: Previous, Save & New, Save, Cancel

Browser tabs: (3) WhatsApp, Job Profile, Flows | Salesforce, Flow Builder, Lightning Experience | Sales.

Address bar: nanudhalvan-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.app

Search Setup

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SETUP Profiles

Profile: Standard Platform User

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

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

Learn IP Basics | Enabled Apex Class Access | Enabled Visualforce Page Access | Enabled External Data Source Access | Enabled Named Credential Access | Enabled External Credential Provider Access | Enabled Custom Metadata Type Access | Enabled Custom Settings Definition Access | Enabled Flow Access | Enabled Service Presence Status Access | Enabled Custom Permissions

Profile Detail Edit Clone View Users

Name	Standard Platform User	Custom Profile	<input type="checkbox"/>
User License	Salesforce Platform	Modified By	Admin
Created By	salesforce.com, inc. 17/10/2023, 10:41 am	Modified	18/10/2023, 3:34 pm

Page Layouts

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

Browser tabs: (3) WhatsApp, Job Profile, Flows | Salesforce, Flow Builder, Lightning Experience | Sales.

Address bar: nanudhalvan-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.app

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Prospector Users

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Products

Asset Settings

SETUP Profiles

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

Existing Profile	Standard Platform User
User License	Salesforce Platform
Profile Name	Management

Save Cancel

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SETUP Profiles

Profile Edit: Management

Set the permissions and page layouts for this profile.

Profile Edit: Save Save & New Cancel

Name: Management

User License: Salesforce Platform

Description:

Custom Profile: ☒

Custom App Settings

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

Service Provider Access

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SETUP Profiles

Contact Point Consents: ☒ ☒ ☒ ☒ ☐ ☐

Contact Point Emails: ☒ ☒ ☒ ☒ ☐ ☐

Streaming Channels: ☒ ☒ ☒ ☒ ☐ ☐

User External Credentials: ☐ ☐ ☐ ☐ ☐ ☐

Custom Object Permissions

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

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

Session Settings

Session Times Out After: 2 hours of inactivity

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

Password Policies

User passwords expire in: 90 days

Enforce password history: 3 passwords remembered

Browser tabs: (3) WhatsApp, Job Profile, Flows | Salesforce, Flow Builder, Lightning Experience | Sales.

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Setup Home Object Manager

Search: user

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Public Groups
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Feature Settings
Data.com
Prospector Users
Service
Embedded Service
Messaging for In-App and Web User

SETUP Users

New User

Help for this Page

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: ☐
WDC User: ☐

Required Information

Browser tabs: (3) WhatsApp, Job Profile, Flows | Salesforce, Flow Builder, Lightning Experience | Sales.

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Search Setup: Search Setup

Setup Home Object Manager

Search: prof

Users
Profiles

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

SETUP Profiles

Profile Edit

Help for this Page

Sales Manager

Set the permissions and page layouts for this profile.

Profile Edit Save Save & New Cancel

Name: Sales Manager
User License: Salesforce Platform
Custom Profile: ☒
Description:

Custom App Settings

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

Service Provider Access

Setup | Home | Object Manager

Search Setup

Q prof

Users

Profiles

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

Profiles

Contact Point Addresses ☐ ☐ ☐ ☐ ☐ ☐

Contact Point Consents ☒ ☒ ☒ ☒ ☐ ☐

Contact Point Emails ☒ ☒ ☒ ☒ ☐ ☐

Sellers ☒ ☒ ☒ ☒ ☐ ☐

Streaming Channels ☒ ☒ ☒ ☒ ☐ ☐

User External Credentials ☐ ☐ ☐ ☐ ☐ ☐

Custom Object Permissions

	Basic Access				Data Administration			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"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input 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"/>	
Customer	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Department ☐ ☐ ☐ ☐ ☐ ☐

Details ☐ ☐ ☐ ☐ ☐ ☐

Management ☐ ☐ ☐ ☐ ☐ ☐

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

Setup | Home | Object Manager

Search Setup

Q prof

Users

Profiles

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

Users

New User

User Edit

Save Save & New Cancel

General Information

First Name: manager

Last Name: sales

Alias: msale

Email: managersales.123@gmail.co

Username: managersales.123@gmail.co

Nickname: User1697625227851209885

Title:

Company:

Department:

Division:

Role: <None Specified>

User License: Partner App Subscription

Profile: Partner App Subscription User

Active: ☒

Marketing User: ☐

Offline User: ☐

Knowledge User: ☐

Flow User: ☐

Service Cloud User: ☐

Site.com Contributor User: ☐

Site.com Publisher User: ☐

WDC User: ☐

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Users

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Permission Sets

Feature Settings

Digital Experiences

Settings

Functions

Sales

Accounts

Person Accounts

Salesforce Scheduler

Assignment Policies

Salesforce Scheduler

SETUP

Permission Sets

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

All Permission Sets Edit Delete Create New View

New

Action	Permission Set Label	Description	License
<input type="checkbox"/>	Buider	Always access to the store. Lets users see products and...	B2B Buyer Permission Set One Seat
<input type="checkbox"/>	Buyer Manager	Includes all Buyer capabilities, and allows access to ma...	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/>	C2C High Scale Flow Integration User	Allows integration user to access features specific to C3...	Cloud Integration User
<input type="checkbox"/>	CRM User	Denotes that the user is a Sales Cloud or Service Cloud u...	CRM User
<input type="checkbox"/>	Commerce Admin	Allow access to commerce admin features.	Commerce Admin Permission Set License Seats
<input type="checkbox"/>	Contact Center Admin	Manage Service Cloud Voice contact centers that use Am...	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Agent	Access agent features in Service Cloud Voice contact cent...	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Supervisor	Access supervisor features in Service Cloud Voice contact...	Service Cloud Voice User
<input type="checkbox"/>	Experience Profile Manager		Salesforce
<input type="checkbox"/>	Facility Manager	Lets users create, read, edit, and delete locations, subloa...	Facility Manager

1-25 of 31 0 Selected 4 Previous Next Page 1 of 2

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

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Assignment Policies

Salesforce Scheduler

SETUP

Permission Sets

Permission Set: managerbanksales

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

Session Activation Required ☐

Permission Set Groups Added To: 0

API Name: managerbanksales

Namespace Prefix:

Created By: Admin 18/10/2023, 4:08 pm

Last Modified By: Admin 18/10/2023, 4:08 pm

Apps

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

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

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

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

Apex Class Access

Browser tabs: WhatsApp, Job Profile, Flows | Salesforce, Flow Builder, Lightning Experience | Sales...

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Notification: 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

Search: per

Hyperforce Assistant
Lightning Experience Transition Assistant

Users

- Permission Set Groups
- Permission Sets**
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 - Digital Experiences
 - Settings
 - Functions
 - Sales
 - Accounts**
 - Person Accounts
 - Salesforce Scheduler
 - Assignment Policies
 - Salesforce Scheduler

SETUP

Permission Sets

Permission Set: **managerbanksales**

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

Permission Set Overview | Object Settings | **Accounts**

Accounts Save Cancel

Object Permissions

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

Field Permissions

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

Search Setup

Setup | Home | Object Manager

Search: user

Users

- Permission Set Groups
- Permission Sets
- Profiles
- Public Groups
- Queues
- Roles
- User Management Settings**
- Users**
- Feature Settings
 - Data.com
 - Prospector **Users**
 - Service
 - Embedded Service
 - Messaging for In-App and Web **User** Verification
- User Interface
 - Action Link Templates

All Users

1 item selected

Search this list...

	Full Name ↑	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Chatter Expert	Chatter	chatty.00d5j00000cigpaeav.kbx1nt04y2af@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	Consumer 5	c5	cons5@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Consumer
<input type="checkbox"/>	Integration User	integ	integration@00d5j00000cigpaeav.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input checked="" type="checkbox"/>	Manager 1	m1	sathish11@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Manager
<input type="checkbox"/>	Manager 2	m2	manager221@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Solution Manager
<input type="checkbox"/>	Provider 1	p1	sathiskumars100@gamil.com	Marketing Team	<input checked="" type="checkbox"/>	Provider
<input type="checkbox"/>	SATHISH KUMAR S	SS	sathishkumar103@gmail.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Security User	sec	insightssecurity@00d5j00000cigpaeav.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

Cancel Next

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Navigation bar: My-app, Recently Viewed, College, Department, Details, Management, Customers, Bank.

Section: Customers Recently Viewed

0 items • Updated a few seconds ago

Search: Search this list...

Buttons: New, Settings, List View, Edit, Refresh, Filter

Total Life Time Value	Name
Full-screen Sync	

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