

Naan Mudhalvan
Salesforce Developer(Course)
Assignment

Name : **R.senthilkumar**
Naan Mudhalvan id : **au620120104087**
Year & Dep : 4th year & IT
Batch : 2024
Zone no : Zone 8

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

WhatsApp

New Custom Object | Sales/

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

GmailYouTubeMapsGlobal NetAcad...Edu Interactive...

Search Setup

SetupHomeObject Manager

SETUP

New Custom Object

New Custom Object

Help for this Page

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

Custom Object Definition Edit

SaveSave & NewCancel

Custom Object Information

Required Information

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

LabelCollegeExample: Account

Plural LabelCollegesExample: Accounts

Starts with vowel sound☐

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

Object NameCollegeExample: 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 NameCollege NameExample: Account Name

New Custom Object | Sales/ Salesforce Developer assi... Salesforce

WhatsApp

New Custom Object | Sales/

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

GmailYouTubeMapsGlobal NetAcad...Edu Interactive...

Search Setup

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Custom Object Definition Edit

SaveSave & NewCancel

Custom Object Information

Required Information

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

LabelDepartmentExample: Account

Plural LabelDepartmentsExample: Accounts

Starts with vowel sound☐

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

Object NameDepartmentExample: Account

Description

Context Sensitive Help Setting

☒ Open the standard Salesforce.com Help & Training window

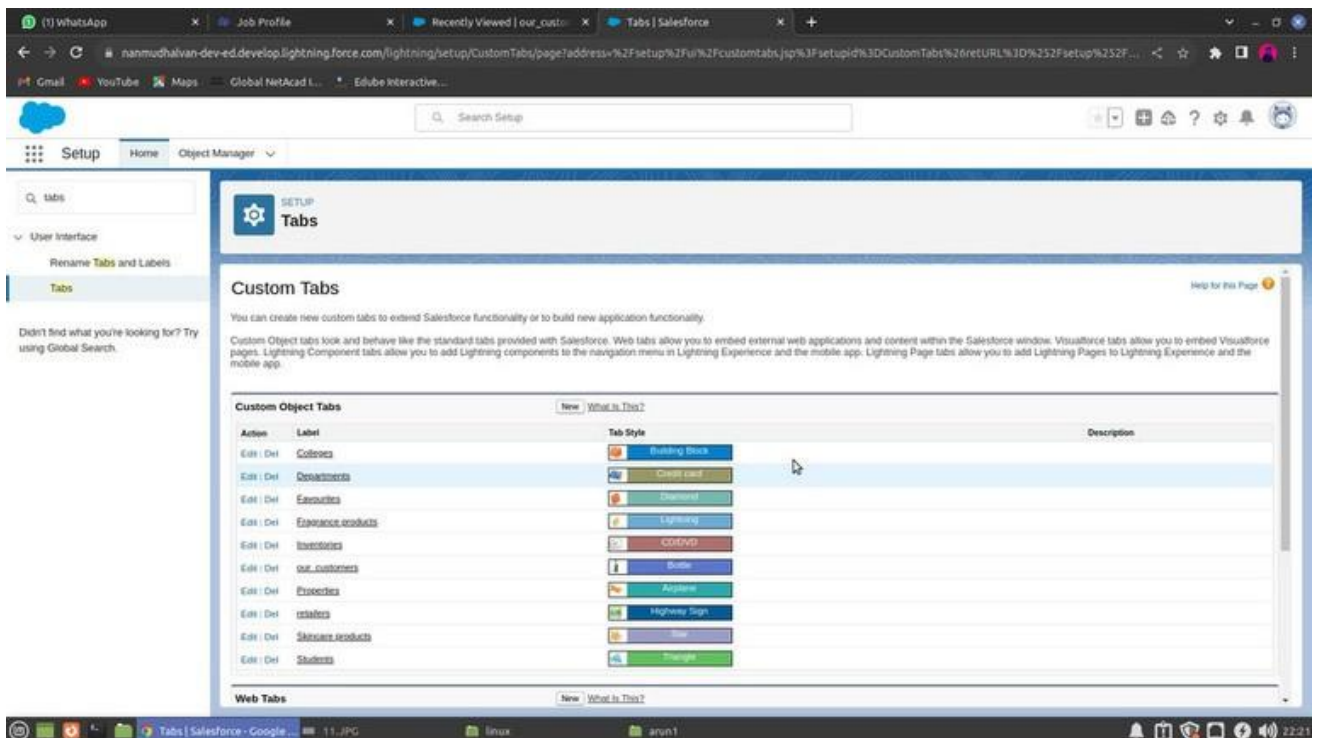
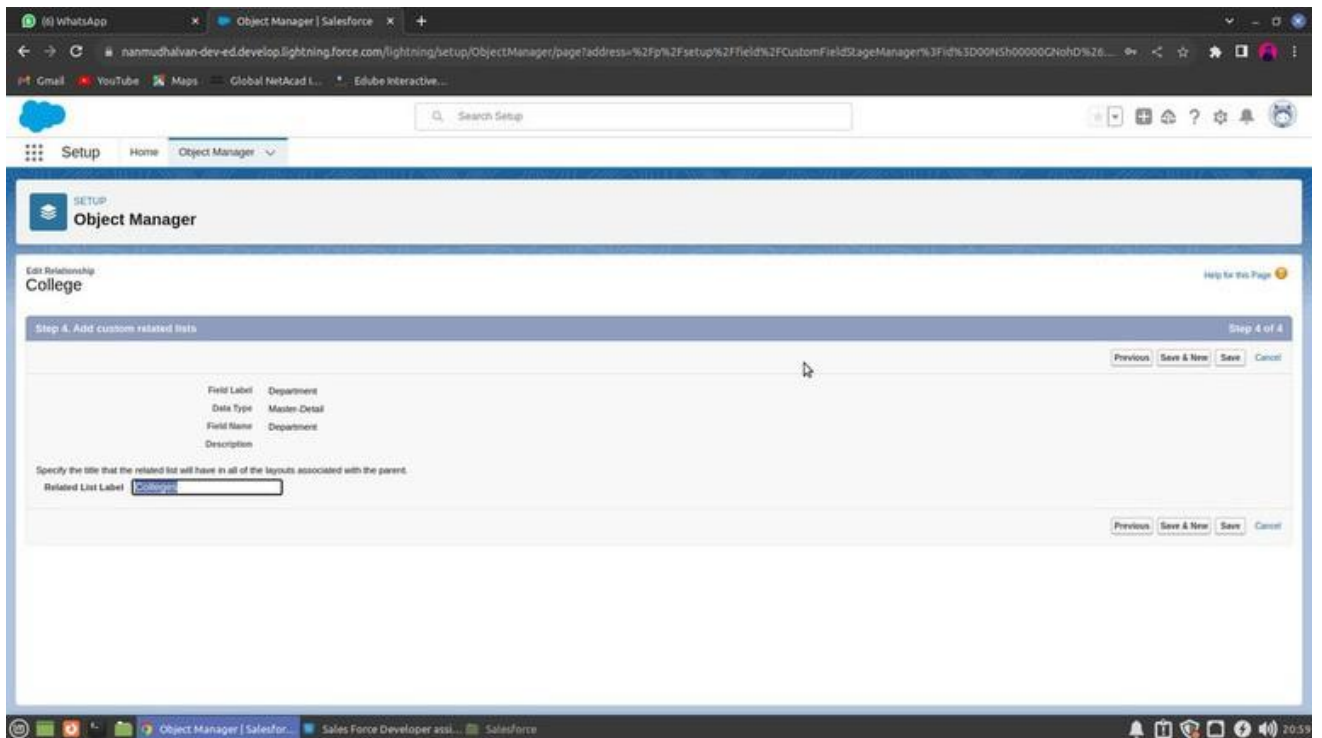
☐ Open a window using a Visualforce page

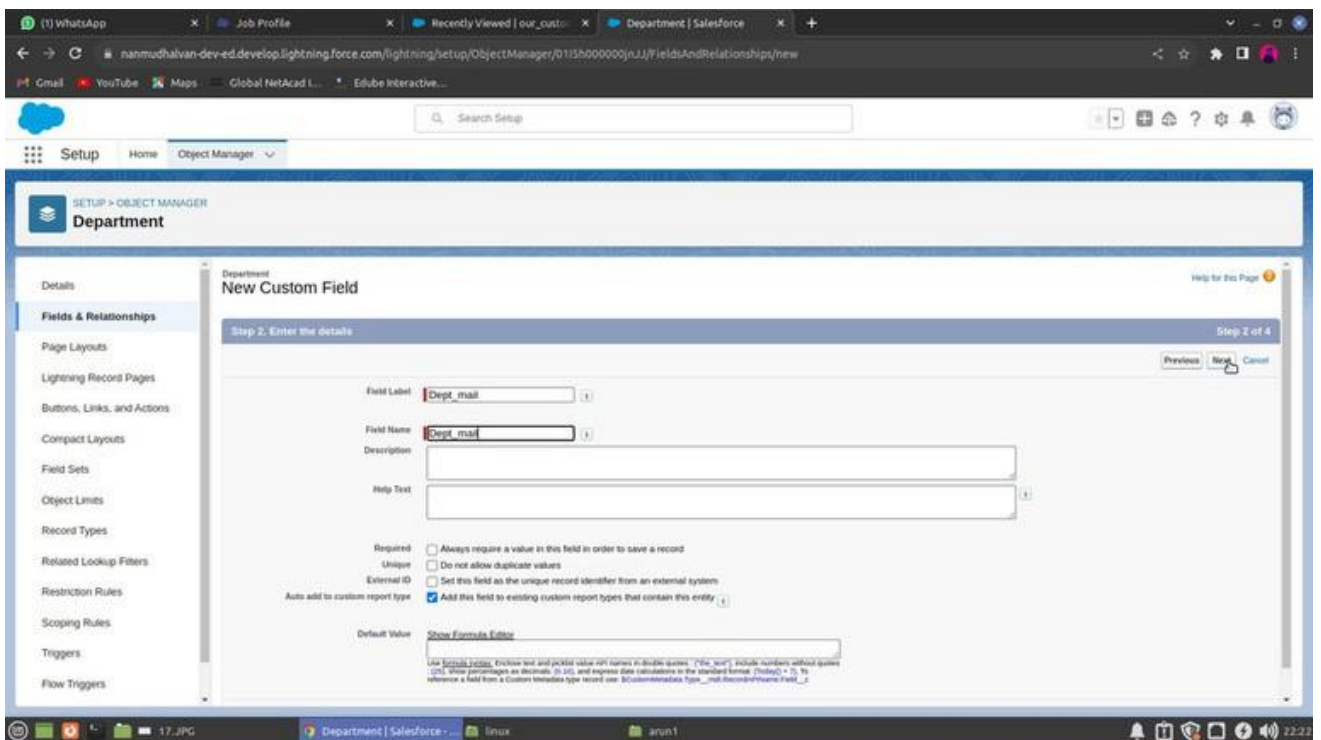
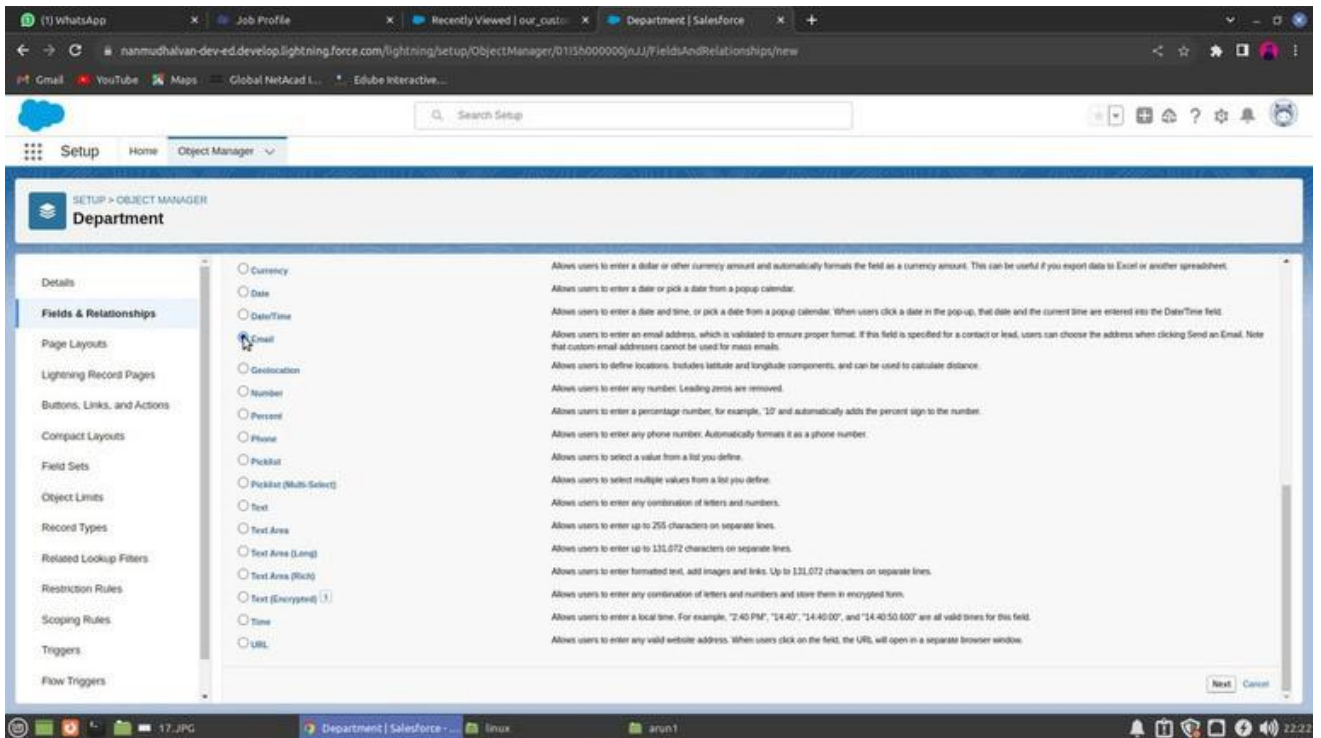
Content Name

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.

New Custom Object | Sales/ Salesforce Developer assi... Salesforce





Setup > OBJECT MANAGER
Department

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

- ☐ Currency
- ☐ Date
- ☐ DateTime
- ☐ Email
- ☐ Geolocation
- ☐ Number
- ☐ Percent
- ☒ Phone
- ☐ Picklist
- ☐ Picklist (Multi-Select)
- ☐ Text
- ☐ Text Area
- ☐ Text Area (Long)
- ☐ Text Area (Rich)
- ☐ Text (Encrypted) (1)
- ☐ 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.

Print Cancel

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Scoping Rules

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Flow Triggers

Department
New Custom Field

Help for this Page

Step 2 of 4

Step 2. Enter the details

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, merge, formula text and picklist value names in double quotes. Use "text" to include numbers without quotes. Use "10" to include numbers with quotes. Use "10.00" to include numbers with two decimal places. To reference a field from a Custom Metadata type record use: \$CustomMetadata.Type__c.RecordName.Field__c

Previous Next Cancel

Previous Next Cancel

Setup Home Object Manager

Department

Details

Fields & Relationships

7 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)		
Department Name	Name	Text(30)		✓
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)		

17.JPG Department | Salesforce - linux arun1 22:23

Setup Home Object Manager

Department

Details

Fields & Relationships

Full screen On

Next Cancel

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

Data Type

Select one of the data types below.

☐ None Selected

☐ Auto Number

☐ Formula

☐ Roll-Up Summary

☐ Lookup Relationship

☒ Master-Detail Relationship

☐ External Lookup Relationship

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

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.

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.

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

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

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

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

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

Setup Search Setup

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Restriction Rules

Department
New Relationship

Step 6. Add custom related lists

Step 6 of 6

Previous Save & New Save Cancel

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

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

Related List Label

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

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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:

 - 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.

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.

Setup

Home

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College

New Custom Field

Roll-up Summary Field

Help for this Page

Step 2. Enter the details

Step 2 of 5

Previous

Next

Cancel

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

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College

New Custom Field

Roll-up Summary Field

Help for this Page

Step 3. Define the summary calculation

Step 3 of 5

Previous

Next

Cancel

Select Object to Summarize

Master Object

College

Summarized Object

Department

+ Required information

Select Roll-Up Type

☒ COUNT

☐ SUM

☐ MIN

☐ MAX

Field to Aggregate

Note

Filter Criteria

☒ All records should be included in the calculation

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

Previous

Next

Cancel

Setup Home Object Manager

College

Details

Fields & Relationships

5 Items, Sorted by Field Label

Quick Find

New Deleted Fields Field Dependencies Set History Tracking

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

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

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Search Layouts

Setup Home Object Manager

app m

Apps

User Interface

App Menu

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

Lightning Experience App Manager

New Lightning App New Connected App

22 Items • Sorted by App Name • Filtered by All appnames - TabSet Type

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

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

Search Setup

Apps

User Interface

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 ⓘ
#0070D2

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

App Launcher Preview

Send

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 Interface

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

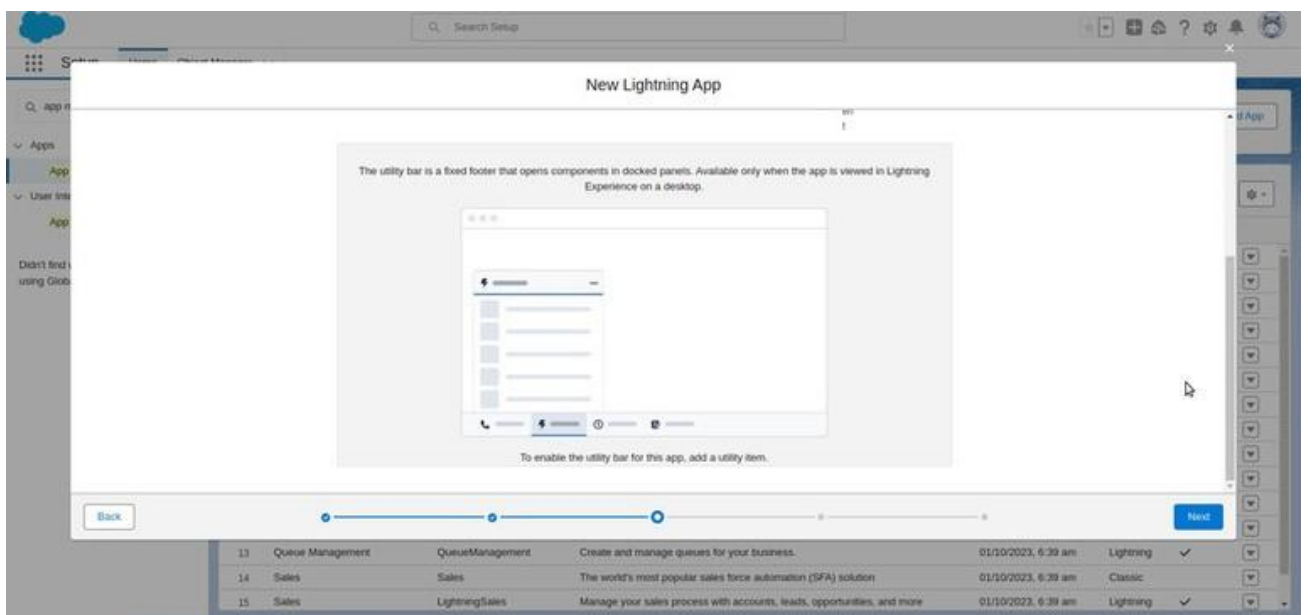
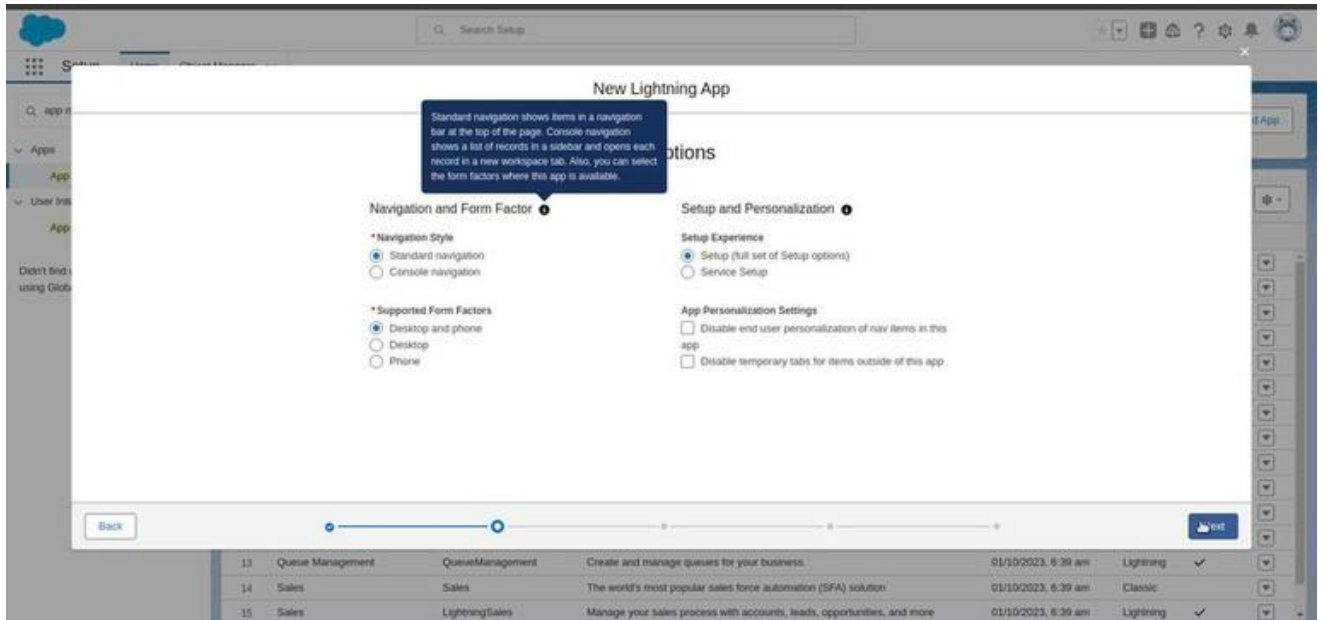
Primary Color Hex Value ⓘ
#0070D2

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

App Launcher Preview

Send

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 [?]
#0070C2

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

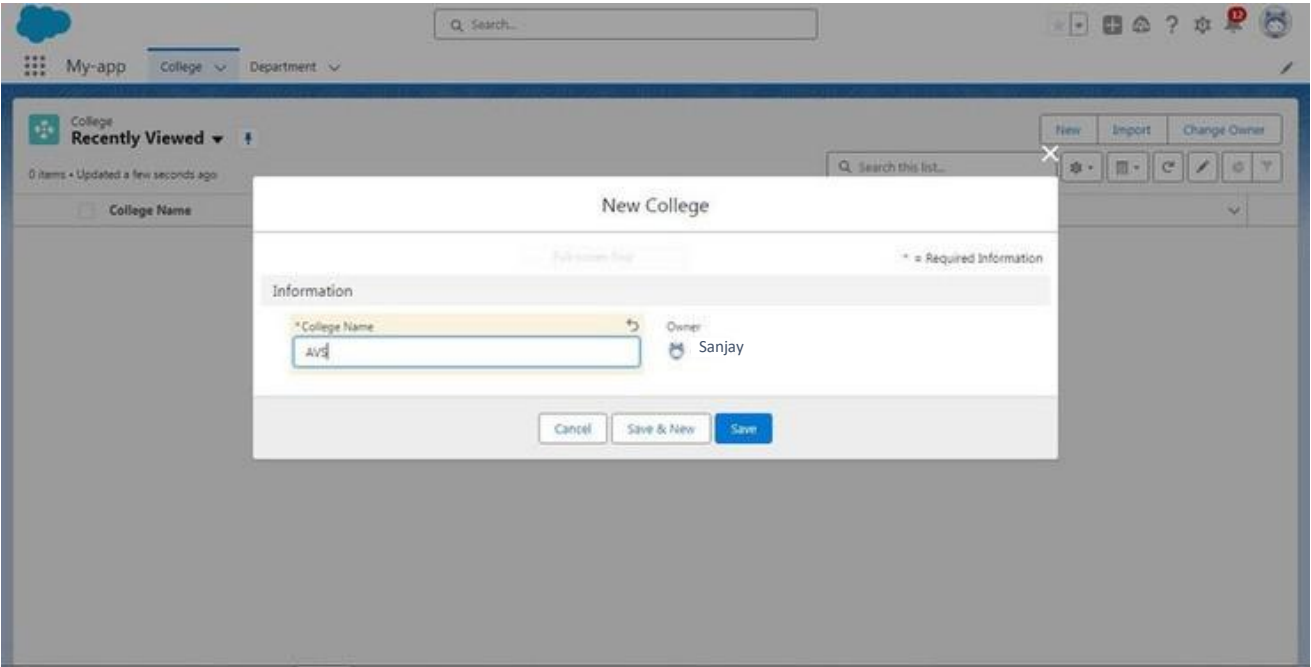
App Launcher Preview


My My_App

Next

ID	Name	Label	Description	Created	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	✓

The screenshot displays the Salesforce Lightning App Builder interface. A 'New Lightning App' window is open, showing a canvas with two components: 'Salesforce API Only System Integrations' and 'System Administrator'. The interface includes a left sidebar with navigation options like 'App', 'Data', 'Maps', 'Res', 'Apps', and 'Mobile'. The bottom of the screen shows a table of existing Lightning Apps, including 'Queue Management', 'Sales', and 'LightningSales'.





My-app

College

Department

Search...

☆

+

🔍

?

⚙️

🔔

👤

College

AVS

New Contact

Edit

New Opportunity

Related

Details

College Name

AVS

Owner

Sanjay

Total Count


0

Created By

Sanjay 18/10/2023, 3:28 pm

Last Modified By

Sanjay 18/10/2023, 3:28 pm



My-app

College

Department

Search...

✖

+

🔍

?

⚙️

🔔

👤

Department

Recently Viewed

0 items • Updated a few seconds ago

Department Name

New Department

* = Required Information

Information

* Department Name

CSE

Email

cse@gmail.com

Phone

1234567899


* College

AVS

Cancel

Save & New

Save










My-app

College

Department

Search...



Department

CSE

Department CSE was created.

New Contact

Edit

New Opportunity

Related

Details

Department Name

CSE

Full screen View

Email

cse@gmail.com

Phone

1234567899

College

AVS

Created By


Sanjay

18/10/2023, 3:29 pm

Last Modified By

Sanjay

18/10/2023, 3:29 pm










My-app

College

Department

Search...



College

AVS

New Contact

Edit

New Opportunity

Related

Details

College Name

AVS

Owner

Sanjay

Full screen View

Total Count

1

Created By

Sanjay

18/10/2023, 3:28 pm

Last Modified By

Sanjay

18/10/2023, 3:29 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 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. [Tell me more!](#) [Don't show this message again](#)

Custom Object Definition Edit Save Save & New Cancel

Custom Object Information Required Information

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

Label Example: Account

Plural Label Example: Accounts

Starts with vowel sound ☐

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

Object Name Example: Account

Description

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

Context Name

Enter Record Name Label and Format

The Record Name appears in page layouts, list views, 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

Details

Edit Delete

Details

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Compact Layouts

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Scoping Rules

Triggers

Flow Triggers

Details

Description

API Name

Custom ☒

Singular Label

Plural Label

Enable Reports ☐

Track Activities ☐

Track Field History ☐

Deployment Status

Help Settings

Setup > OBJECT MANAGER
Details

Fields & Relationships
4 items, Sorted by Field Label

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

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Flow Triggers

Lookup Relationship

Master-Detail Relationship

External Lookup Relationship

Checkbox

Currency

Date

DateTime

Email

Geolocation

Number

Percent

Phone

Picklist

Picklist (Multi-Select)

Text

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Allows users to enter any combination of letters and numbers.

Setup > OBJECT MANAGER

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Details

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New Custom Field

Step 2: Enter the details

Step 2 of 4

Field Label: Mail

Field Name: Mail

Description:

Help Text:

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

Unique: ☐ Do not allow duplicate values

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

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

Default Value: [Show Formula Editor](#)

Use formula rules, formula text, and picklist value sets in double quotes. ("the_sir") include numbers without quotes. (%), show percentages as decimals, (c, j), and expense date calculations in the standard format. (today) + 10, to reference a field from a Custom Metadata type record use: \$CustomMetadataType__md.RecordName.Field__c

Previous Next Cancel

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New Custom Field

Step 4: Add to page layouts

Step 4 of 4

Field Label: Mail

Data Type: Email

Field Name: Mail

Description:

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

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

☒ Add Field ☐ Page Layout Name

Details Layout

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

Previous Save & New Save Cancel

Setup > OBJECT MANAGER

Details

Details

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Currency

Date

Date/Time

Email

Geolocation

Number

Percent

Phone

Picklist

Picklist (Multi-Select)

Text

Text Area

Text Area (Long)

Text Area (Rich)

Text (Encrypted)

Time

URL

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

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

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

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

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

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

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

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

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

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

Allows users to enter any combination of letters and numbers.

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

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

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

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

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

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

Next Cancel

Setup > OBJECT MANAGER

Details

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Flow Triggers

New Custom Field

Step 2 of 4

Field Label: Phone

Field Name: phone

Description:

Help Text:

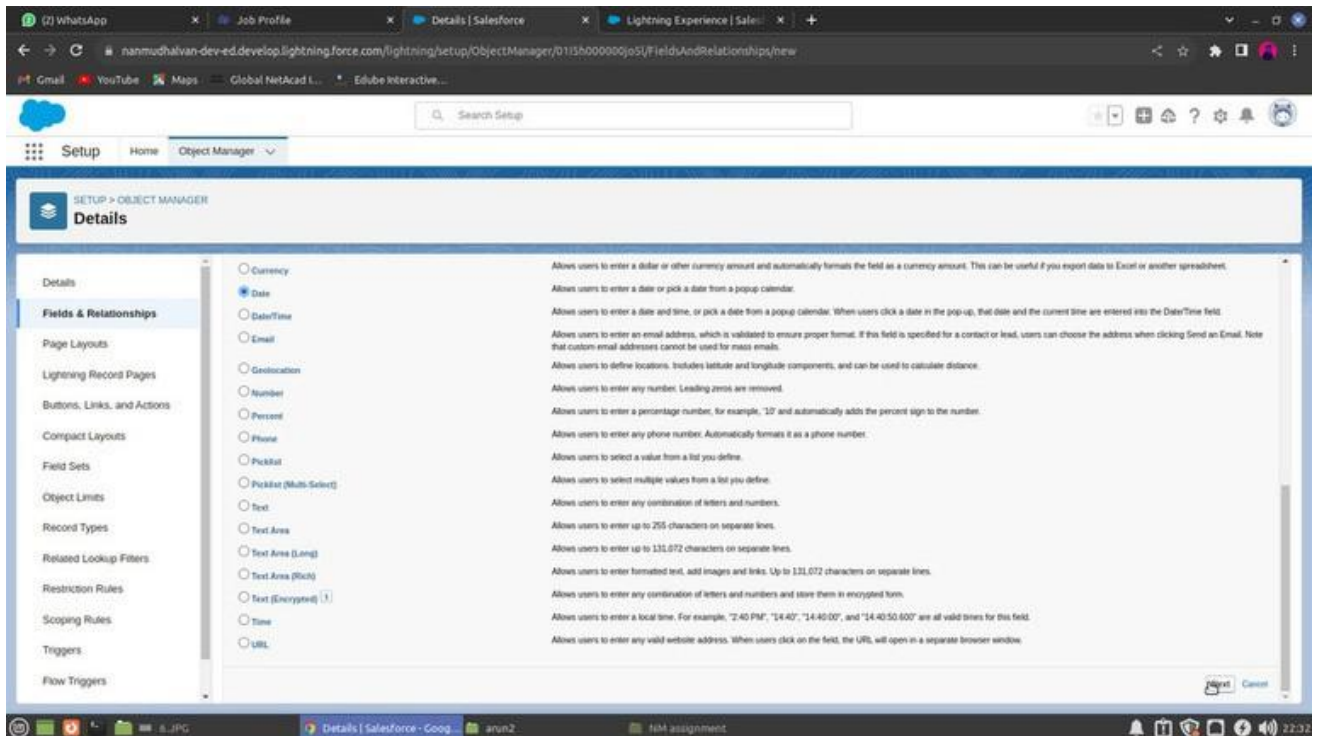
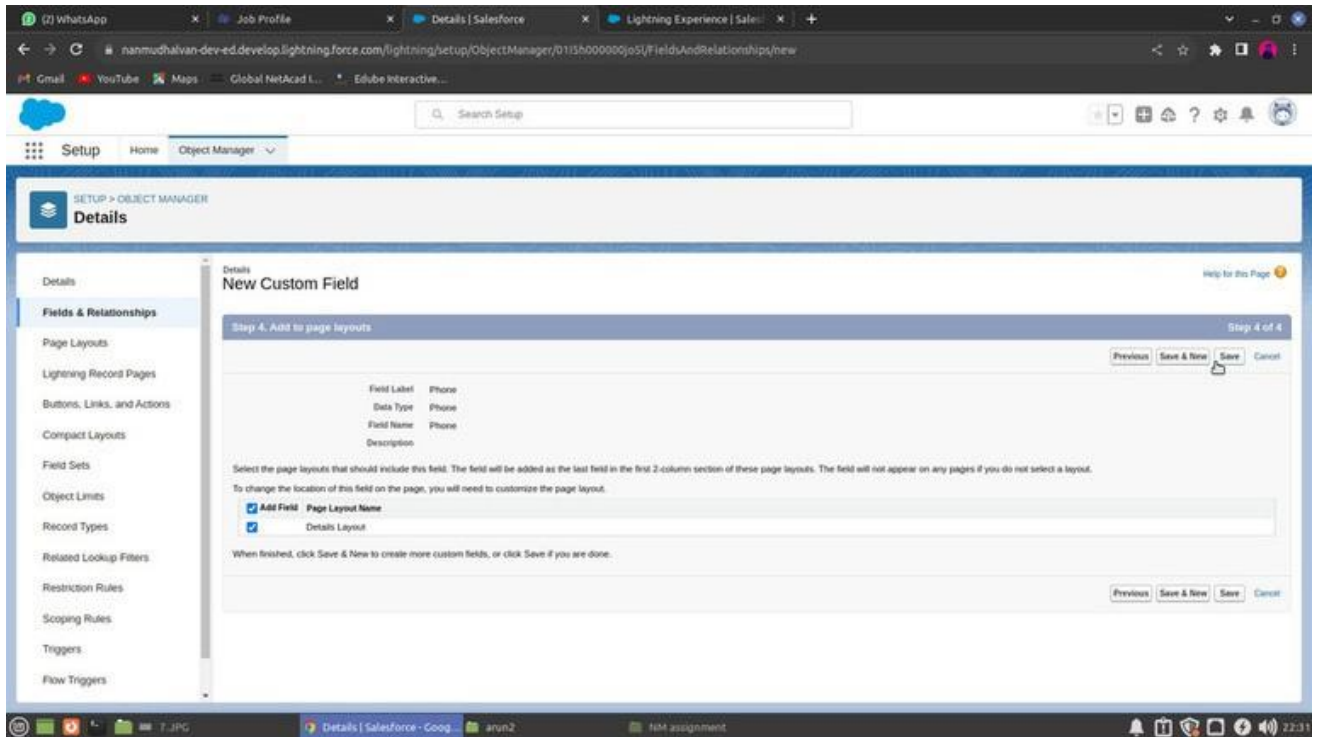
Required: ☐ Always require a value in this field in order to save a record

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, picklists, formulas, text and picklist value API names in double quotes ("file_text"), include numbers without quotes (10), show percentages as decimals (10.0), and express date calculations in the standard format (Today() + 5). To reference a field from a Custom Metadata type record use: \$CustomMetadata.Type__c__RecordName.field__c

Previous Next Cancel



nanmudhalvan-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0113h000000jo5U/FieldsAndRelationships/new

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Flow Triggers

New Custom Field

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 public value API names in double quotes ("foo, bar"). Include numbers without quotes (123). Show 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}. {CustomMetadata.Field__c}

Previous Next Cancel

nanmudhalvan-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0113h000000jo5U/FieldsAndRelationships/new

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New Custom Field

Step 4: Add to page layouts

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

☒ Details Layout

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

Previous Save & New Save Cancel

Browser tabs: (2) WhatsApp, Job Profile, Details | Salesforce, Lightning Experience | Sales | +

Address bar: nanmudhalvan-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0113h000000j0s5/FieldsAndRelationships/new

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☐ Checkboxes

☐ 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

Browser tabs: (2) WhatsApp, Job Profile, Details | Salesforce, Lightning Experience | Sales | +

Address bar: nanmudhalvan-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0113h000000j0s5/FieldsAndRelationships/new

Search Setup

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Flow Triggers

New Custom Field

Step 2: Enter the details

Step 2 of 4

Previous Next Cancel

Field Label: Gender

Values:

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

Male
Female

☐ Display values alphabetically, not in the order entered

☐ Use first value as default value

☒ Restrict picklist to the values defined in the value set

Field Name: Gender

Description:

Help Text:

Setup > OBJECT MANAGER

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New Custom Field

Step 4 of 4: Add to page layouts

Field Label: Gender
Data Type: Picklist
Field Name: Gender
Description:

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

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

☒ Add Field ☐ Page Layout Name

☒ Details Layout

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

Previous Save & New Save Cancel

Setup > OBJECT MANAGER

Details

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Flow Triggers

Fields & Relationships

8 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)		
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		

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

Setup Home Object Manager

Search Setup

Setup 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

Next Cancel

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

Setup Home Object Manager

Search Setup

Setup Tabs

Custom Tabs

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

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

Custom Object Tabs

New What Is This?

Action	Label	Tab Style	Description
Edit Del	Colleges	Building Block	
Edit Del	Departments	Credit card	
Edit Del	Details	Lightning	
Edit Del	Faculties	Element	
Edit Del	Expenditure products	Lightning	
Edit Del	Inventory	COFND	
Edit Del	out_customers	Book	
Edit Del	Properties	Anytime	
Edit Del	relaters	Highway Sign	
Edit Del	Skincare products	Star	
Edit Del	Students	Triangle	

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.

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

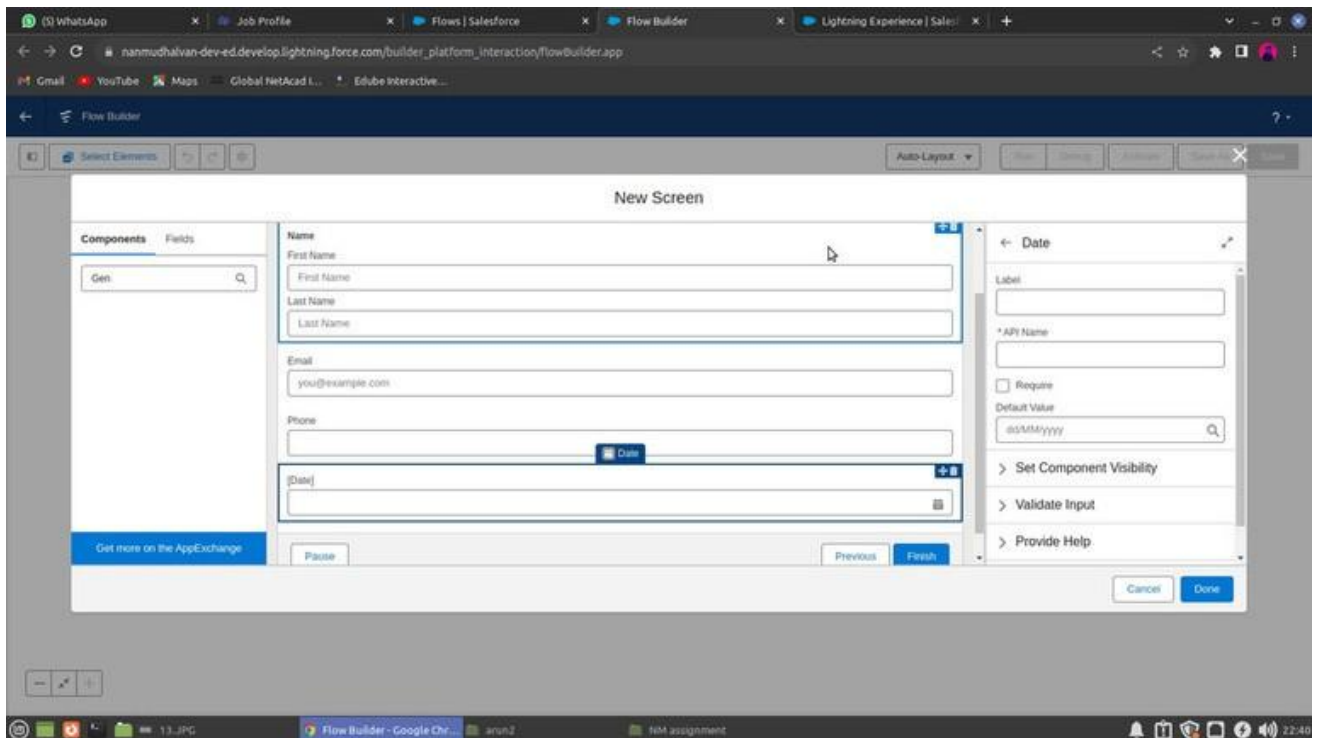
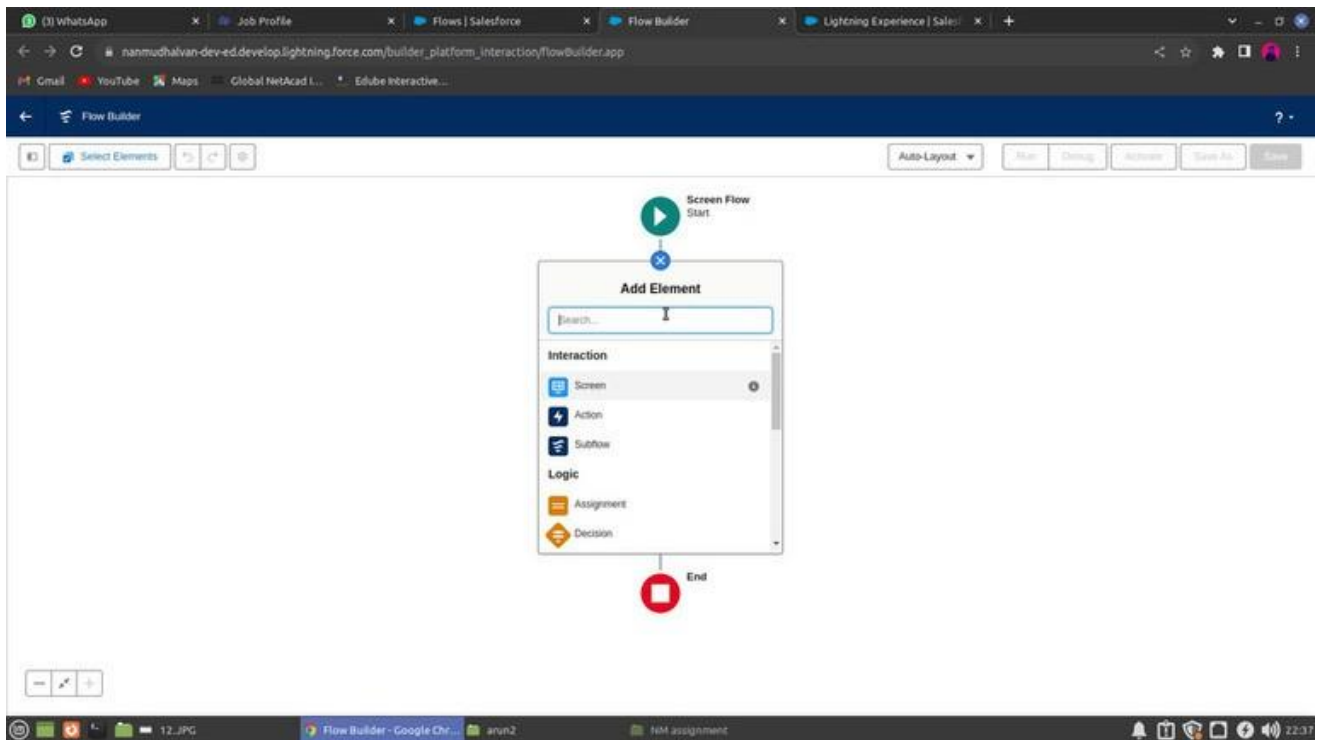
Autolaunched Flow (No Trigger)
Launches when invoked by Apex, processes, REST API, and more. This autolaunched flow runs in the background.

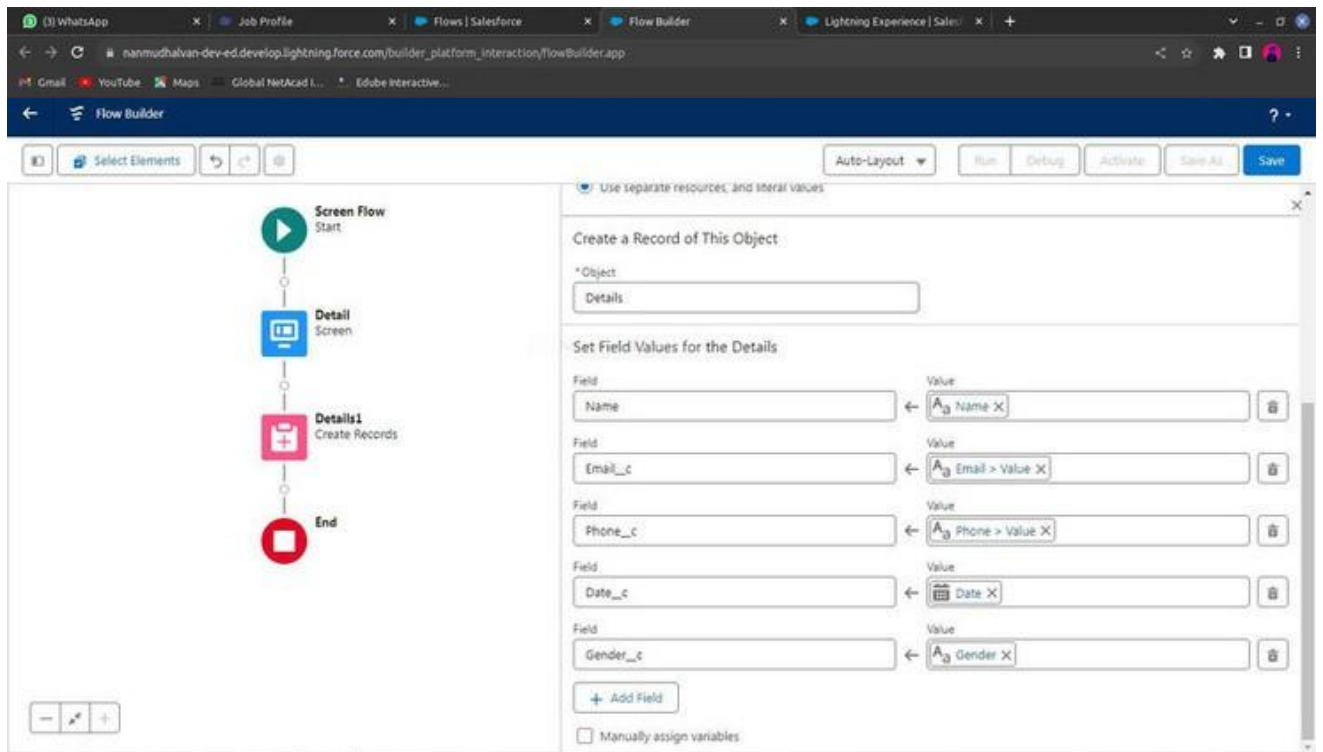
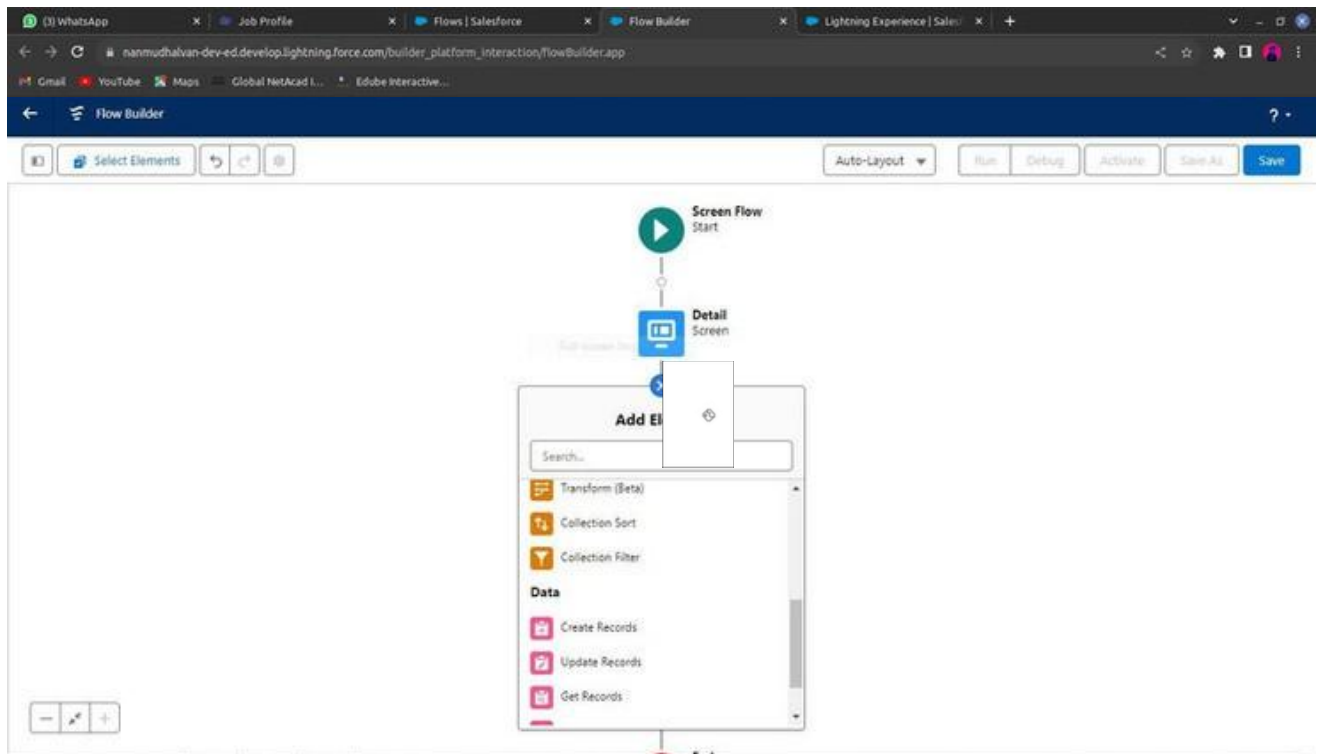
Record-Triggered Flow
Launches when a record is created, updated, or deleted. This autolaunched flow runs in the background.

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

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

Create





Details12

Name
/Sanjay

Email
Sanjay@gmail.com

Phone
1234567890

Date
18-Oct-2023

Gender
male

Next

My-app College Department Details

Details

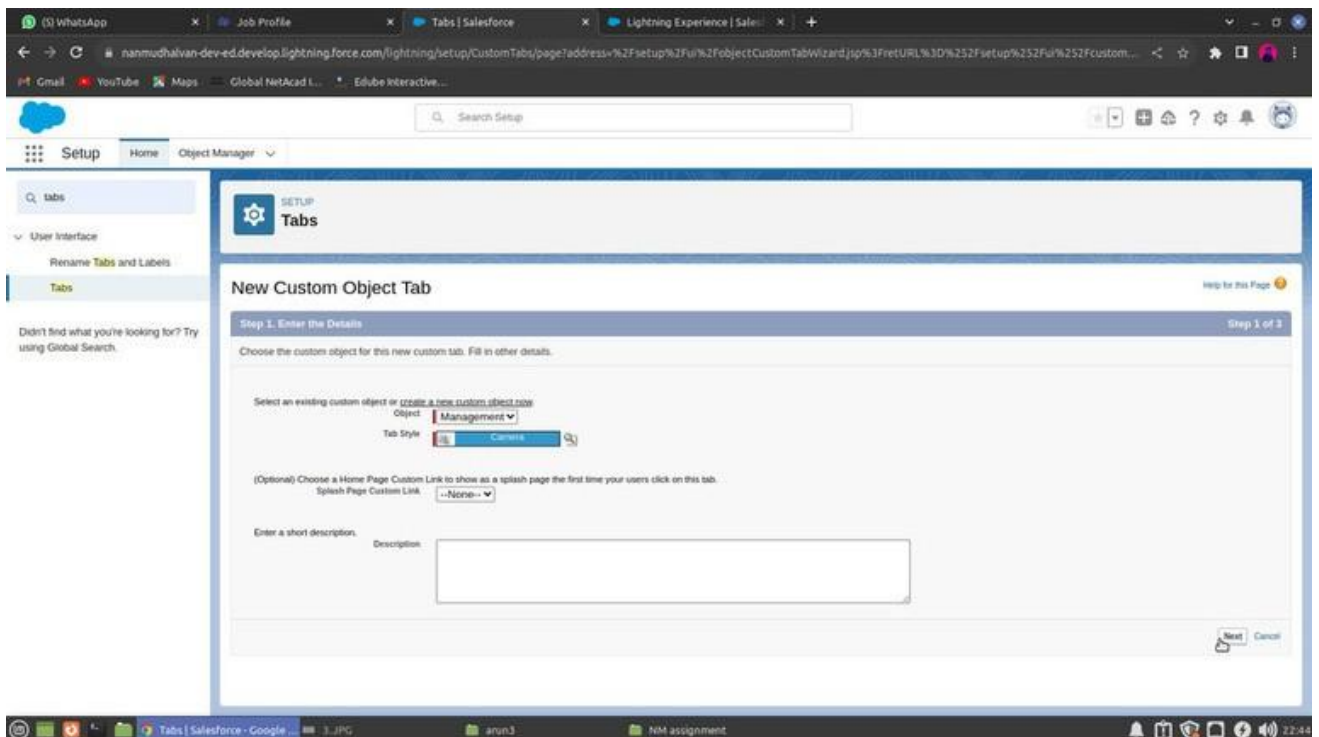
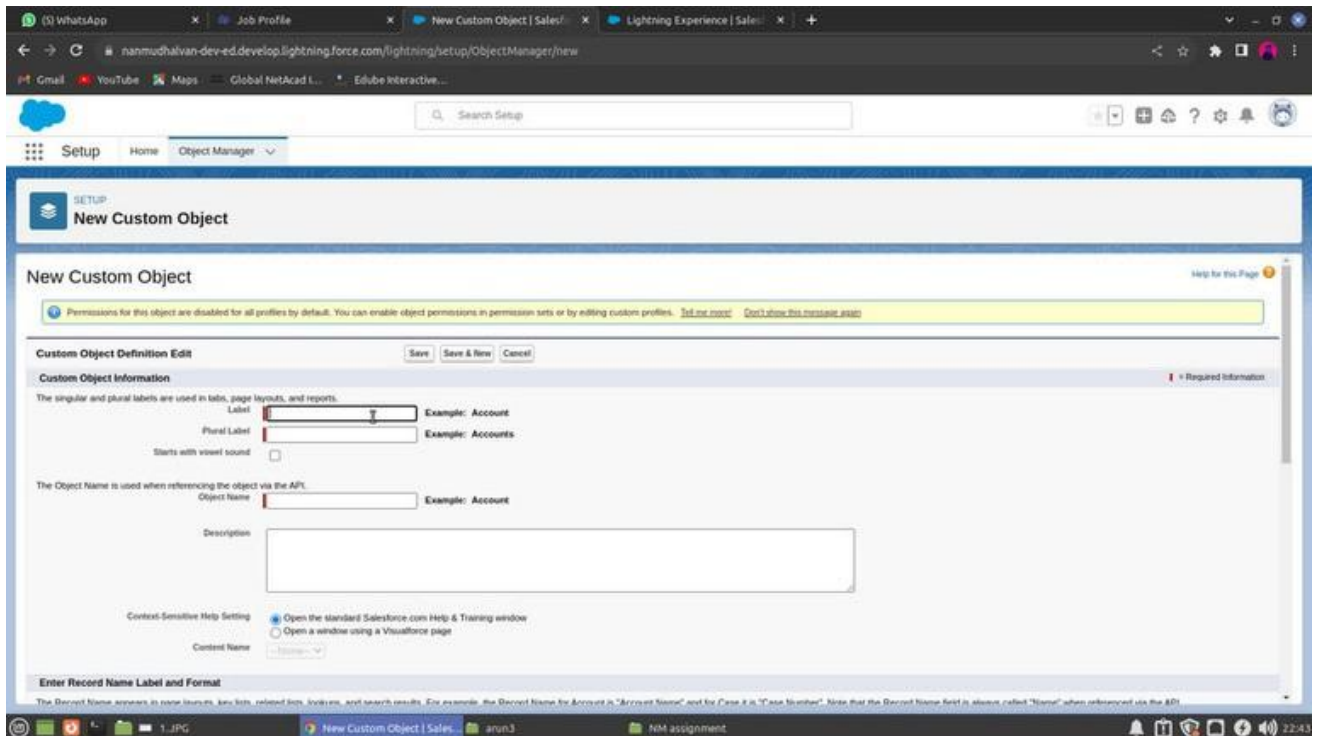
sanjay

New Contact Edit New Opportunity

Related Details

Details Name	/Sanjay	Owner	/Sanjay
Email	Sanjay@gmail.com		
Phone	1234567890		
Date	18/10/2023		
Gender	male		
Created By	/Sanjay -8/10/2023, 3:42 pm	Last Modified By	/Sanjay -8/10/2023, 3:42 pm

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



Setup | Home | Object Manager

Search Setup

Setup Tabs

Custom Object Tabs

Action	Label	Tab Style	Description
Edit Del	Collores	Bulking block	
Edit Del	Departments	Credit card	
Edit Del	Details	Lightning	
Edit Del	Enquiries	Standard	
Edit Del	Expense requests	Lightning	
Edit Del	Inventories	COOVD	
Edit Del	Managements	Camera	
Edit Del	our customers	Book	
Edit Del	Procedures	Apparel	
Edit Del	relations	Highway sign	
Edit Del	Skincare products	Beer	
Edit Del	Students	Trampoline	

Web Tabs

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

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

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

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

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"/>

1-6 of 6 0 Selected 14 Previous Next > >> Page 1 of 1

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

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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

	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"/>

Visible Default

	Visible	Default
Platform (standard__Platform)	<input checked="" type="checkbox"/>	<input type="radio"/>
WDC (standard__Work)	<input type="checkbox"/>	<input type="radio"/>

Service Provider 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

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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"/>

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

Session Settings

Session Times Out After: 2 hours of inactivity

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

Password Policies

User passwords expire in: 90 days

Enforce password history: 3 passwords remembered

Minimum password length: 8

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

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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 Ranges](#) | [Enabled Apex Class Access](#) | [Enabled Visualforce Page Access](#) | [Enabled External Data Source Access](#) | [Enabled Named Credential Access](#) | [Enabled External Credential Principal Access](#) | [Enabled Custom Metadata Type Access](#) | [Enabled Custom Settings Definition Access](#) | [Enabled Flow Access](#) | [Enabled Service Presence Status Access](#) | [Enabled Custom Permissions](#)

Profile Detail

Name	Manager	Edit Clone Delete View Users	
User License	Salesforce Platform	Custom Profile <input checked="" type="checkbox"/>	
Description			
Created By	Admin	Modified By: Admin	
Created	10/10/2023, 3:47 pm	Modified	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: nanudhalvan-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.app

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

New User

Help for this Page

User Edit Save Save & New Cancel

General Information

First Name: manager

Last Name: 1

Alias: m1

Email: manager.aaa@gmail.com

Username: manager.aaa@gmail.com

Nickname: User1697624338709764377

Title:

Company:

Department:

Division:

Role: Marketing Team

User License: Salesforce Platform

Profile: Manager

Active: ☒

Marketing User: ☐

Offline User: ☐

Knowledge User: ☐

Flow User: ☐

Service Cloud User: ☐

Site.com Contributor User: ☐

Site.com Publisher User: ☐

WDC User: ☐

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

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

New User

Help for this Page

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: User1697624453759508865

Title:

Company:

Department:

Division:

Role: Marketing Team

User License: Salesforce

Profile: Solution Manager

Active: ☒

Marketing User: ☐

Offline User: ☐

Knowledge User: ☐

Flow User: ☐

Service Cloud User: ☐

Site.com Contributor User: ☐

Site.com Publisher User: ☐

WDC User: ☐

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. [Learn more](#)

Search Setup

Setup Home Object Manager

per

Hyperforce Assistant

Lightning Experience Transition Assistant

Users

Permission Set Groups

Permission Sets

Feature Settings

Digital Experiences

Settings

Functions

Sales

Accounts

Person Accounts

Salesforce Scheduler

Assignment Policies

Salesforce Scheduler

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	Buyer	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	CRM 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"/> Del Clone	Experience Profile Manager		Salesforce
<input type="checkbox"/> Clone	Facility Manager	Lets users create, read, edit, and delete locations, subloa...	Facility Manager

1-25 of 30 0 Selected 4 Previous Next

Page 1 of 2

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. [Learn more](#)

Search Setup

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per

Hyperforce Assistant

Lightning Experience Transition Assistant

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Permission Set Groups

Permission Sets

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Digital Experiences

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Person Accounts

Salesforce Scheduler

Assignment Policies

Salesforce Scheduler

SETUP Permission Sets

manager12

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

Permission Set Overview

Property	Value
Description	
License	
Session Activation Required	<input type="checkbox"/>
Permission Set Groups Added To	
API Name	manager12
Namespace Prefix	
Created By	Admin, 18/10/2023, 3:52 pm
Last Modified By	Admin, 18/10/2023, 3:52 pm

Apps

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

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

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

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

Apex Class Access

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Salesforce Scheduler

Permission Set: manager12

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

Permission Set Overview Object Settings Accounts

Accounts

Save Cancel

Object Permissions

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

Field Permissions

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

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Salesforce Scheduler

Assignment Policies

Salesforce Scheduler

Select Users to Assign

All Users

1 item selected

Search this list...

	Full Name ↑	Alt...		Role	A...	Profile
<input type="checkbox"/>	Sanjay	AJ	Sanjay@gmail.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Chatter Expert	Chatter	chatty00d5j00000dq4hgeat13yy9pn6v4mm@chatters...		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	consumer 1	c1	cons143@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	consumer
<input type="checkbox"/>	Integration User	integ	integration@00d5j00000dq4hgeat...		<input checked="" type="checkbox"/>	Analytics Cloud Integration Us...
<input checked="" type="checkbox"/>	manager 1	m1	managerabc@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Manager

Cancel Next

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.

Setup Home Object Manager

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Salesforce Scheduler

Assignment Policies

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
manager 1	Marketing Team	Manager	✓	Salesforce Platform	Never Expires

Cancel Back Assign

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.

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Sales

Accounts

Person Accounts

Salesforce Scheduler

Assignment Policies

Salesforce Scheduler

manager12

Current Assignments

Add Assignment

Full Name	Active	Role	Profile	User License	Expires On
manager 1	✓	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 layouts, new lists, related lists, buttons, 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

Setup Tabs

New Custom Object Tab

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 users 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: nanmudhalvan-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/013h000000j07D/Details/view

Setup > Object Manager

Bank

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: 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

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

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

Setup > 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 Required Information

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

Label: Customer Example: Account

Plural Label: Customers Example: Accounts

Starts with vowel sound: ☐

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

Object Name: Customer Example: Account

Description

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

Content Name:

Enter Record Name Label and Format

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

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

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

Select one of the data types below:

☐ None Selected

☐ Auto Number

☐ Formula

☐ Roll-Up Summary

☐ Lookup Relationship

☒ Master-Detail Relationship

☐ External Lookup Relationship

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

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.

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.

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

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

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

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

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

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

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

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

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.

[Login IP Ranges](#) | [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 Definitions 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 18/10/2023, 3:34 pm
Created By	salesforce.com, inc. 17/10/2023, 10:41 am		

Page Layouts

Standard Object Layouts	Global	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

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from. Required Information

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

[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

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Products

Asset Settings

SETUP Profiles

Profile Edit Management

Set the permissions and page layouts for this profile.

Profile Edit

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

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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SETUP Profiles

Contact Point Consents

	1	2	3	4	5	6
Contact Point Consents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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

	1	2	3	4	5	6
Streaming Channels	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
User External Credentials	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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 | +

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

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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

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: User1697625040396307733

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: ☐

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

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Search Setup

Setup Home Object Manager

Search: prof

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

Description:

Custom Profile: ☒

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

Search Setup

Profiles

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"/>	Department	<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"/>	Details	<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"/>	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

Setup

Search Setup

Users

New User

User Edit

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: ☐

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

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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"/>	Buyer	Allows access to the store. Lets users see products and...	B2B Buyer Permission Set One Seat
<input type="checkbox"/>	Buyer Manager	Includes all Buyer capabilities, and allows access to ma...	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/>	C2M 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

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

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Salesforce Scheduler

SETUP

Permission Sets

managerbanksales

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

Permission Set Overview

Description	API Name	managerbanksales
License	Namespace Prefix	
Session Activation Required	Created By	adm_ 18/10/2023, 4:06 pm
Permission Set Groups Added To	Last Modified By	adm_ 18/10/2023, 4:06 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: (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

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SETUP

Permission Sets

Permission Set: **managerbanksales** [Full Screen Help](#) [View Tutorial](#) [Help for this Page](#)

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

Permission Set Overview Object Settings Accounts

Accounts Save Cancel

Object Permissions

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

Field Permissions

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

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

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

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SETUP

All Users

1 item selected

Search this list...

	Full Name	AL...		Role	A...	Profile	
<input type="checkbox"/>	Sanjay	Sanjay@gmail.com			<input checked="" type="checkbox"/>	System Administrator	
<input type="checkbox"/>	Chatter Expert	chatter00d3j00000d04hgeast3jy9pn6v4mm@c...			<input checked="" type="checkbox"/>	Chatter Free User	
<input type="checkbox"/>	consumer 1	c1 cons143@gmail.com		Marketing Team	<input checked="" type="checkbox"/>	consumer	
<input type="checkbox"/>	Integration User	integ integration@00d3j00000d04hgeast3jy9pn6v4mm@c...			<input checked="" type="checkbox"/>	Analytics Cloud Integration User	
<input type="checkbox"/>	manager 1	m1 managerabcabc@gmail.com		Marketing Team	<input checked="" type="checkbox"/>	Manager	
<input type="checkbox"/>	manager 2	m2 managerxyzxyz@gmail.com		Marketing Team	<input checked="" type="checkbox"/>	Solution Manager	
<input checked="" type="checkbox"/>	manager bank	mbank managerbank123@gmail.com		Marketing Team	<input checked="" type="checkbox"/>	Salesforce API Only System Integratio...	

Cancel Next

Browser tabs: (1) WhatsApp, Job Profile, Flows | Salesforce, Flow Builder, Lightning Experience | Sales | +

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

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...

<input type="checkbox"/> Total Life Time Value	Name
Full-screen Snap	

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