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Salesforce Developer(Course)  
Assignment

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Year & Dep : 4th year & IT

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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.

The screenshot displays the 'New Custom Object' setup page in Salesforce. The page is titled 'New Custom Object' and includes a search bar at the top. Below the title, there is a section for 'Custom Object Definition Edit' with buttons for 'Save', 'Save & New', and 'Cancel'. The 'Custom Object Information' section contains the following fields:

- Label:** College (Example: Account)
- Plural Label:** Colleges (Example: Accounts)
- Starts with vowel sound:** ☐
- Object Name:** College (Example: Account)
- Description:** (Empty text area)
- Context Sensitive Help Setting:** ☒ Open the standard Salesforce.com Help & Training window, ☐ Open a window using a Visualforce page
- Context Name:** (Dropdown menu)

Below the 'Custom Object Information' section is the 'Enter Record Name Label and Format' section. It includes a note: '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.' The fields are:

- Record Name:** College Name (Example: Account Name)

The bottom of the page shows the taskbar with various application icons and the system clock indicating 20:58.

WhatsApp | New Custom Object | Sales | +

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

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. [Get me more](#) [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, key lists, related lists, link lists, 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.

WhatsApp | Object Manager | Salesforce | +

nanmudhalvan-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/page?address=%2Fp%2Fsetup%2Ffield%2FCustomFieldStageManager%3Fid%3D000HSh00000QNhD%26...

Setup Home Object Manager

## SETUP Object Manager

### Edit Relationship College

Help for this Page

#### Step 4. Add custom related lists

Previous Save & New Save Cancel

Field Label	Department
Date Type	Master-Detail
Field Name	Department
Description	

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

Related List Label:

Previous Save & New Save Cancel

Setup

Custom Tabs

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

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

Custom Object Tabs

Action	Label	Tab Style	Description
Edit   Del	Codones	Building Block	
Edit   Del	Departments	Classic card	
Edit   Del	Essexvictoria	Classic card	
Edit   Del	Essexvictoria products	Lightning	
Edit   Del	Inventories	Classic card	
Edit   Del	our customers	Classic card	
Edit   Del	Properties	Classic card	
Edit   Del	relaters	Classic card	
Edit   Del	Skinner products	Classic card	
Edit   Del	Students	Classic card	

Web Tabs

Setup

Object Manager

Department

Fields & Relationships

- 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.

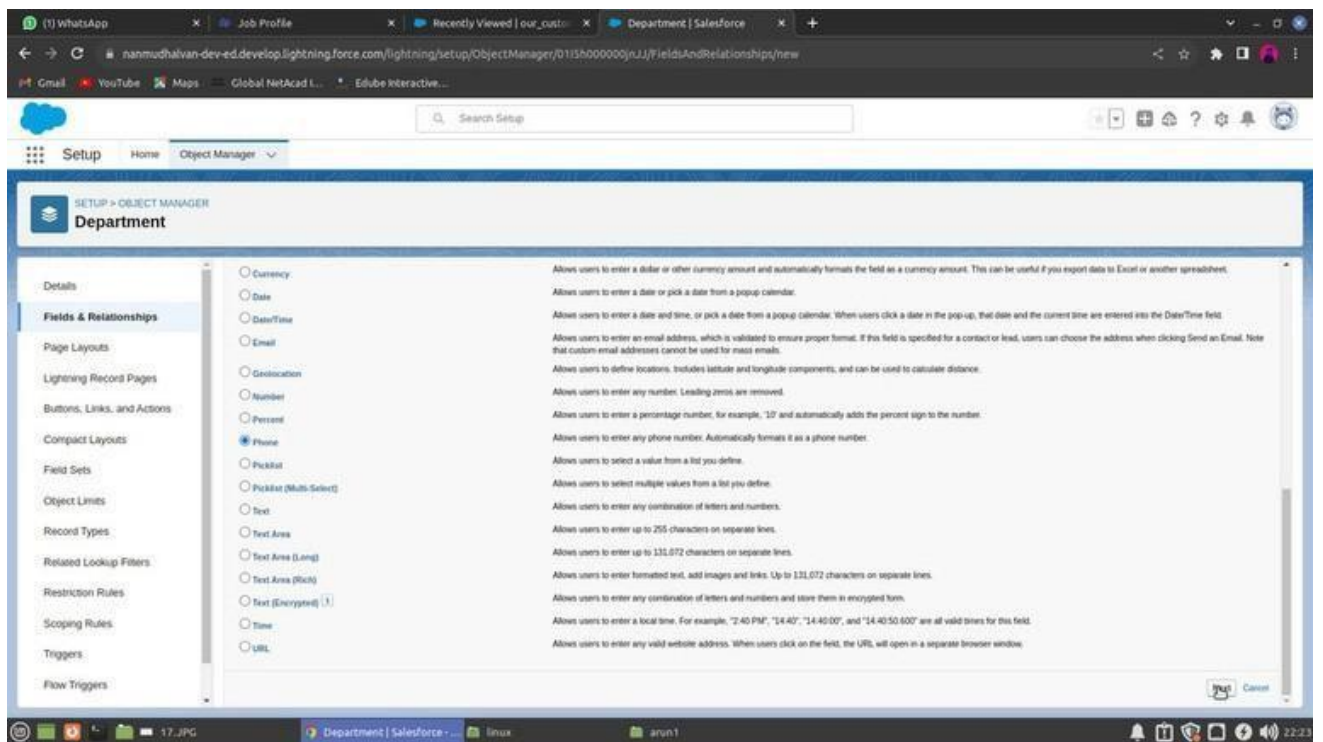
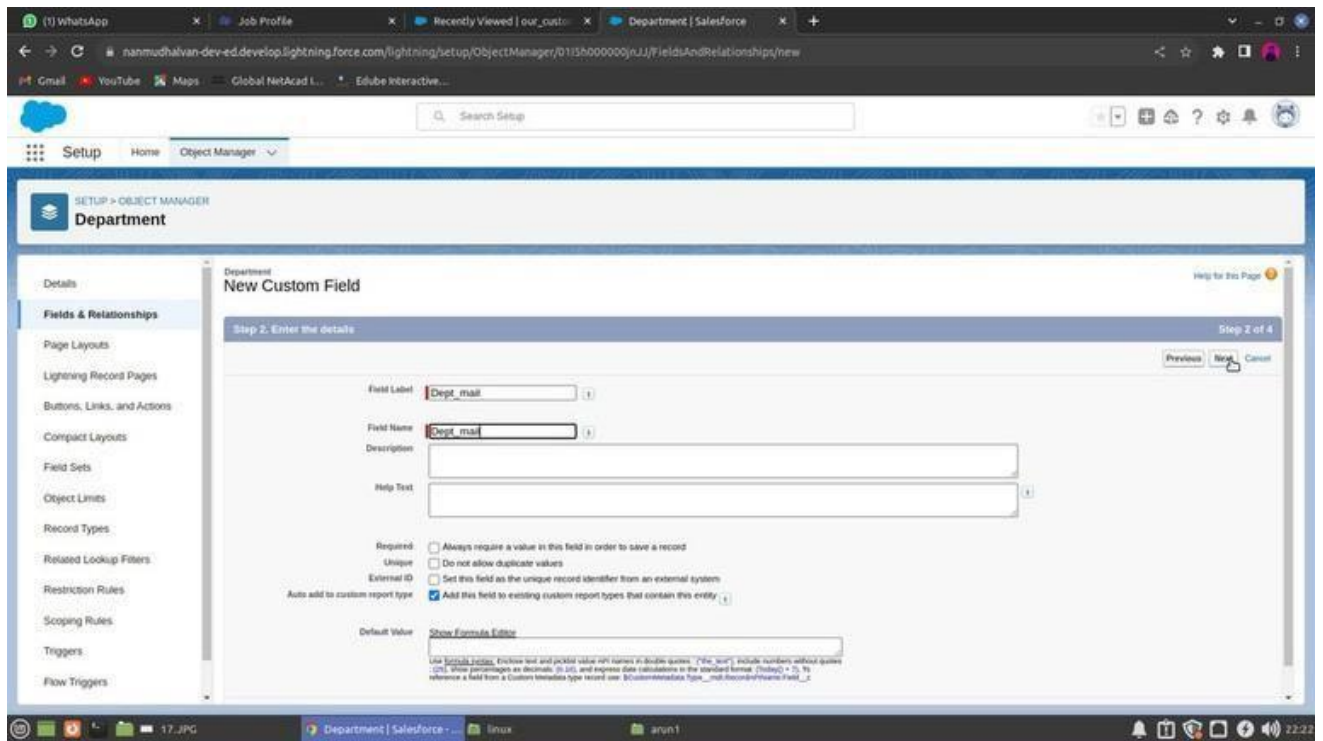
Allows users to enter up to 131,072 characters on separate lines.

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, "7:40 PM", "14:40", 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.





Setup | Object Manager | Department | New Custom Field

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 to create, combine text and picklist values, roll up summary values, and perform calculations. For example, to calculate the sum of two fields, use the formula: {Field\_A} + {Field\_B}. To reference a field from a Custom Metadata type record, use: {CustomMetadataType\_\_c\_\_RecordName\_\_Field\_\_c}.

Previous Next Cancel

Setup | Object Manager | Department | 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(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)		

[Setup](#)
[Home](#)
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**SETUP > OBJECT MANAGER**  
**Department**

[Details](#)  
[Fields & Relationships](#)  
[Page Layouts](#)  
[Lightning Record Pages](#)  
[Buttons, Links, and Actions](#)  
[Compact Layouts](#)  
[Field Sets](#)  
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[Record Types](#)  
[Related Lookup Filters](#)  
[Restriction Rules](#)

Full screen help [Next](#) [Cancel](#)

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

Data Type	
<input type="radio"/> None Selected	Select one of the data types below.
<input type="radio"/> Auto Number	A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
<input type="radio"/> 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.
<input type="radio"/> 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.
<input type="radio"/> 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.
<input checked="" type="radio"/> Master-Detail Relationship	<p>Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:</p> <ul style="list-style-type: none"> <li>The relationship field is required on all detail records.</li> <li>The ownership and sharing of a detail record are determined by the master record.</li> <li>When a user deletes the master record, all detail records are deleted.</li> <li>You can create rollup summary fields on the master record to summarize the detail records.</li> </ul> <p>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.</p>
<input type="radio"/> External Lookup Relationship	Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

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**SETUP > OBJECT MANAGER**  
**Department**

[Details](#)  
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[Record Types](#)  
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[Restriction Rules](#)

Full screen help [Help for this Page](#)

**Department**  
**New Relationship**

Step 6 of 6

Step 6. Add custom related lists.

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](#)





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

**Step 3. Define the summary calculation** Full-screen Page Step 3 of 5

Previous Next Cancel

**Select Object to Summarize** Required Information

Master Object College

Summarized Object Department

**Select Roll-Up Type**

☒ COUNT

☐ SUM

☐ MIN

☐ MAX

Field to Aggregate None

**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 Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER  
College

Details

**Fields & Relationships** Full-screen Page  New Deleted Fields Field Dependencies Set History Tracking

5 Items, Sorted by Field Label

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

Setup | Home | Object Manager

Search Setup

app m

Apps

App Manager

User Interface

App Menu

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

SETUP Lightning Experience App Manager

New Lightning App New Connected App

22 items • Sorted by App Name • Filtered by All appmenutems - 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://namudhalvan-dev-ed.develop.lightning.force.com/one/one.app#/setup/NavigationMenu/home>

Setup | Home | Object Manager

Search Setup

app m

Apps

App Manager

User Interface

App Menu

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

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 <sup>?</sup>  
Name your app...

\* Developer Name <sup>?</sup>  
Enter a developer name...

Description <sup>?</sup>  
Enter a description...

**App Branding**

Image <sup>?</sup>

Primary Color Hex Value <sup>?</sup>  
#007002

Upload

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	✓

**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**

[Next](#)

ID	Label	Page Layout	Page Name	Page URL	Page Type	Page Icon	Page Color	Page 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	✓		

**New Lightning App**

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

**Navigation and Form Factors**

\*Navigation Style

- ☒ Standard navigation
- ☐ Console navigation

\*Supported Form Factors

- ☒ Desktop and phone
- ☐ Desktop
- ☐ Phone

**Setup and Personalization**

Setup Experience

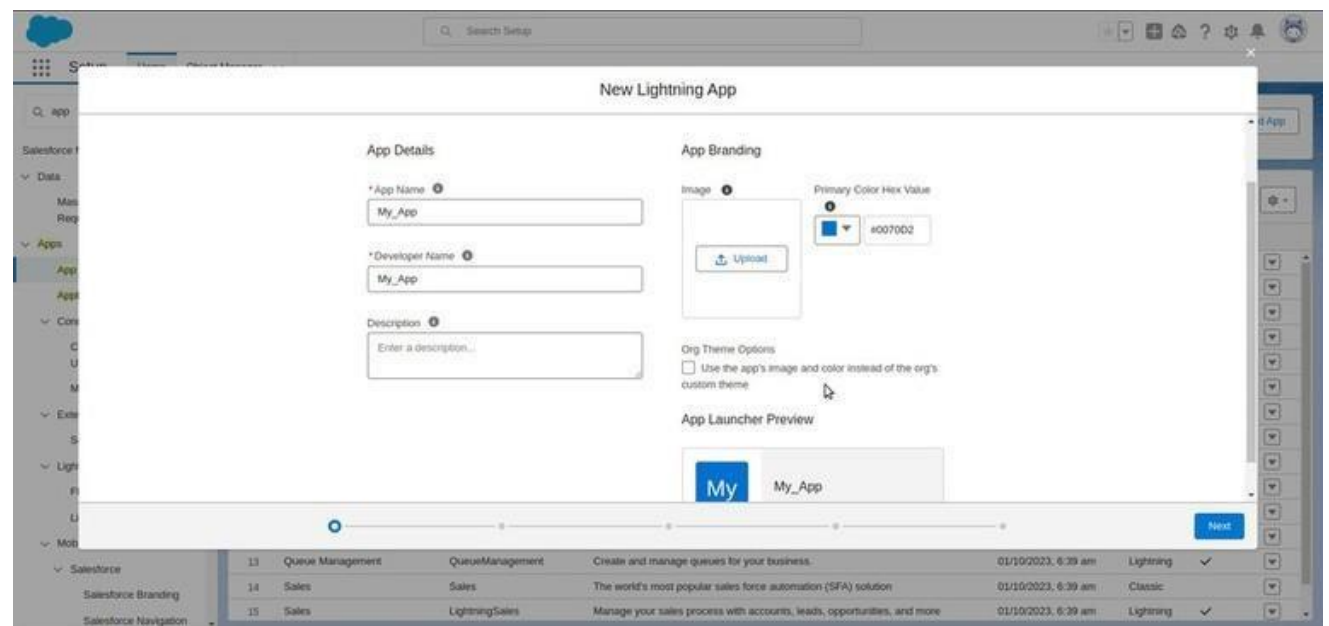
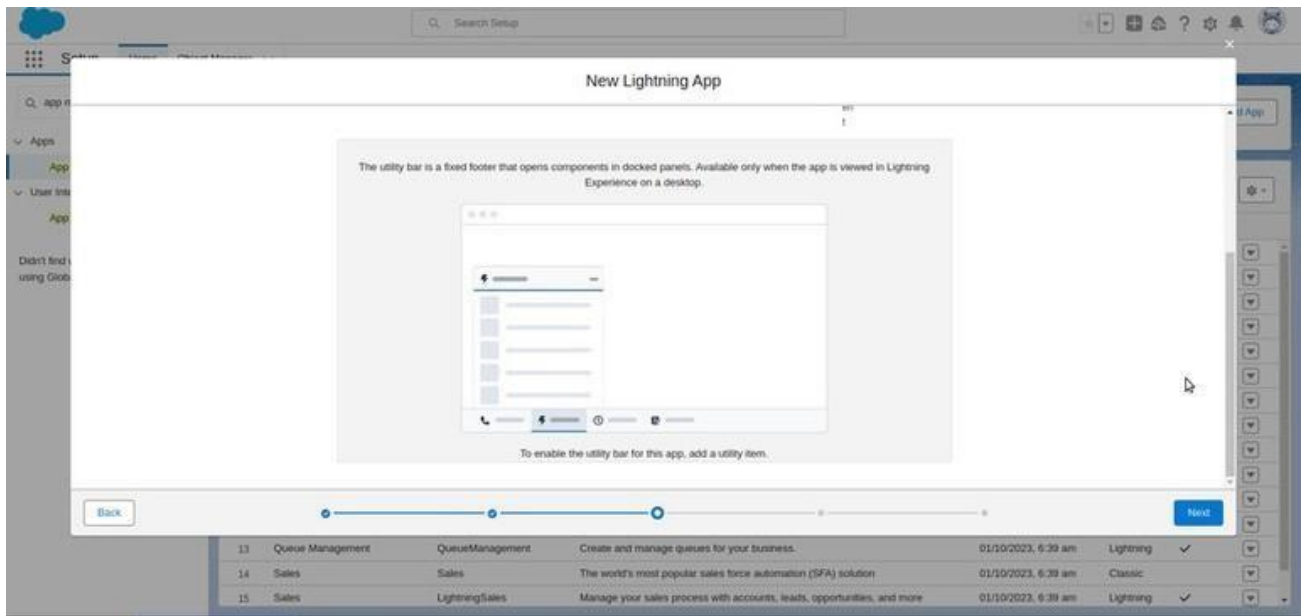
- ☒ Setup (full set of Setup options)
- ☐ Service Setup

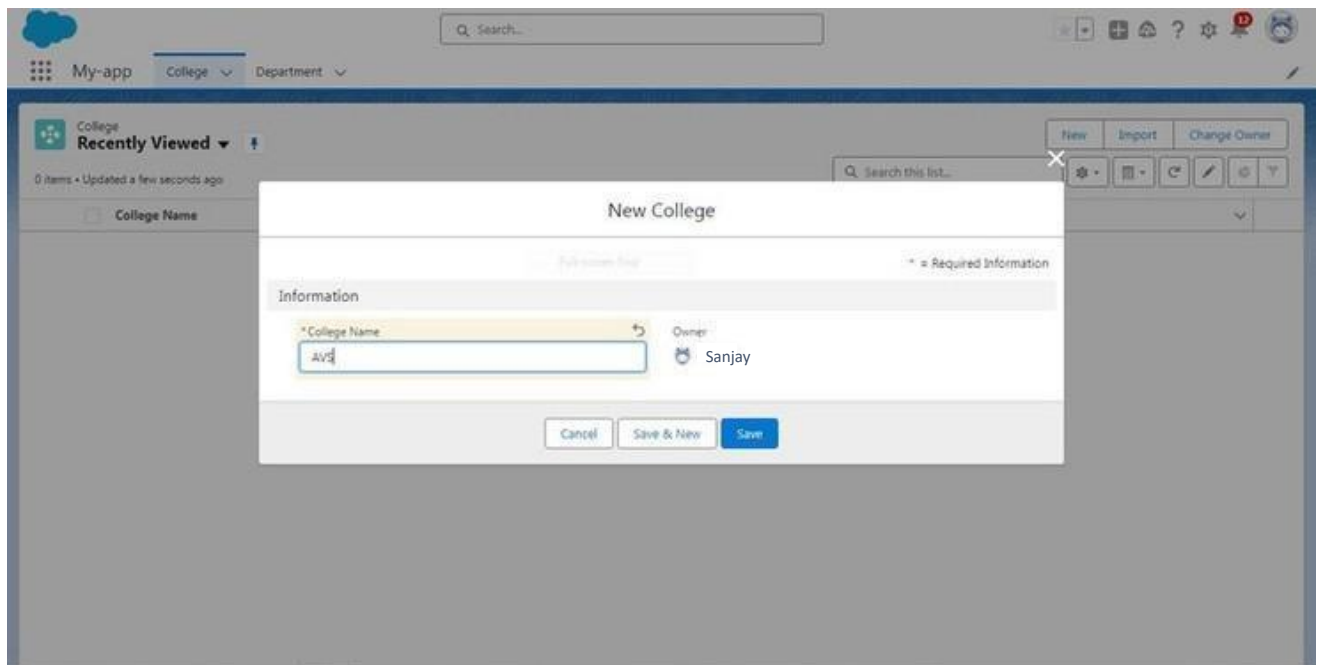
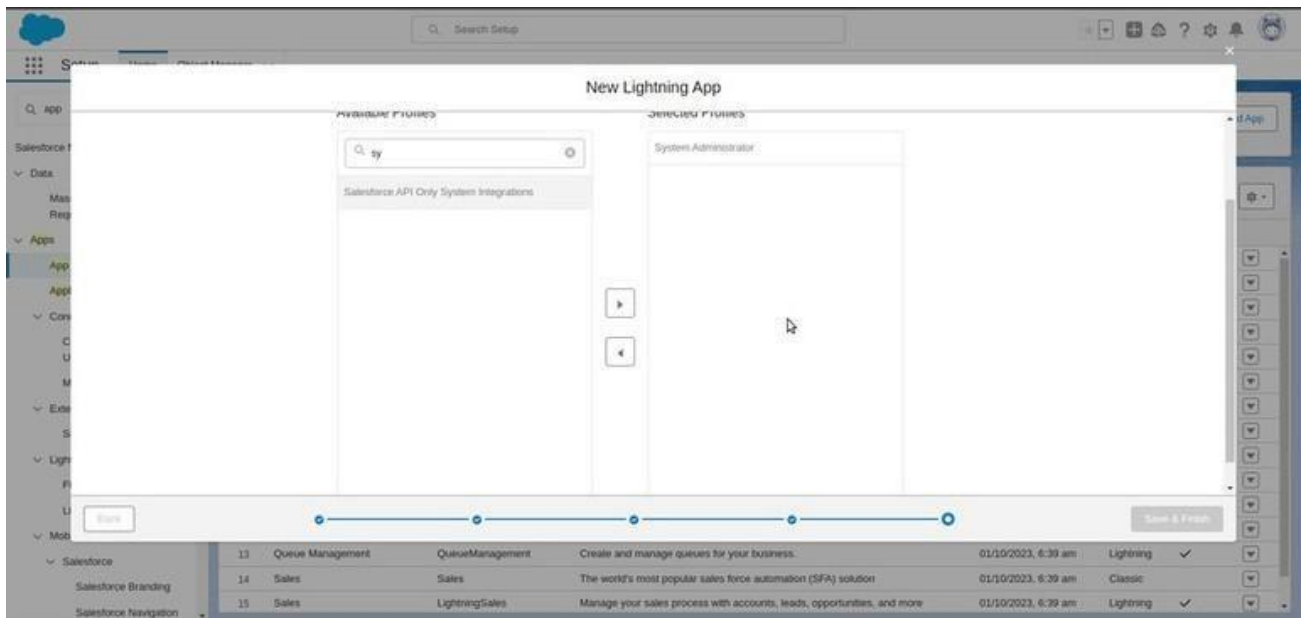
App Personalization Settings

- ☐ Disable end user personalization of nav items in this app
- ☐ Disable temporary tabs for items outside of this app


Back

Next
















My-app

College

Department

Q Search...



College AVS

New Contact Edit New Opportunity

Related

Details

College Name

AVS

Total Count

0

Created By


Vignesh 18/10/2023, 3:28 pm

Owner

Vignesh

Last Modified By

Vignesh 18/10/2023, 3:28 pm










My-app

College

Department

Q 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 ContactEditNew Opportunity

Related

Details

Department Name

CSE

Full access link

Email

cse@gmail.com

Phone

1234567899

College


AVS

Created By

Vignesh 18/10/2023, 3:29 pm

Last Modified By

Vignesh 18/10/2023, 3:29 pm










My-app

College

Department

Search...



College AVS

New ContactEditNew Opportunity

Related

Details

College Name

AVS

Owner

Vignesh

Full access link

Total Count

1

Created By

Vignesh 18/10/2023, 3:28 pm

Last Modified By

Vignesh 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.

The screenshot shows the Salesforce 'New Custom Object' setup page. The browser tabs include 'WhatsApp', 'Job Profile', 'New Custom Object | Sales...', and 'Lightning Experience | Sales...'. The address bar shows the URL: 'nanmudhalvan-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new'. The page title is 'New Custom Object'. A yellow warning banner states: '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 me more](#) [Don't show this message again](#)'. Below the banner is the 'Custom Object Definition Edit' section with 'Save', 'Save & New', and 'Cancel' buttons. The 'Custom Object Information' section includes: 'The singular and plural labels are used in tabs, page layouts, and reports.' with fields for 'Label' (set to 'Details', example 'Account') and 'Plural Label' (set to 'Details', example 'Accounts'); 'Starts with vowel sound' checkbox (unchecked); 'The Object Name is used when referencing the object via the API.' with 'Object Name' (set to 'Details', example 'Account') and a 'Description' text area; 'Context-Sensitive Help Setting' with radio buttons for 'Open the standard Salesforce.com Help & Training window' (selected) and 'Open a window using a Visualforce page'; and 'Context Name' (set to 'Details'). At the bottom, the 'Enter Record Name Label and Format' section explains the 'Record Name' field, with examples for 'Account' and 'Case'.

Setup Home Object Manager

## Details

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

2.JPG

Details

Description

API Name: Details\_c

Custom

✓

Singular Label: Details

Plural Label: Details

Enable Reports

Track Activities

Track Field History

Deployment Status: Deployed

Help Settings: Standard salesforce.com Help Window

Edit Delete

Setup Home Object Manager

## Details

Details

Fields & Relationships

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Scoping Rules

Triggers

Flow Triggers

7.JPG

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	CreatedBy	Lookup(User)		
Details Name	Name	Text(80)		✓
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓

Setup > OBJECT MANAGER

## Details

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

☐ 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

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

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Flow Triggers

### 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 Editor: Enclose text and picklist values with single quotes ("the test"). Include numbers without quotes. (24). When percentages are decimals, (0.14), and express date calculations in the standard format: (Today() + 7). To reference a field from a Custom Metadata type record, use: \$CustomMetadata.Type\_\_c.myRecordOfEvents.Field\_\_c



Setup > OBJECT MANAGER

## Details

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

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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

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

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Restriction Rules

Scoping Rules

Triggers

Flow Triggers

☐ Currency

☐ Date

☐ Date/Time

☐ Email

☐ Geolocation

☐ Number

☐ Percent

☒ Phone

☐ Picklist

☐ Picklist (Multi-Select)

☐ Text

☐ Text Area

☐ Text Area (Long)

☐ Text Area (Rich)

☐ Text (Encrypted) (X)

☐ 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, "7:40 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 Home Object Manager

## Details

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

### New Custom Field

Step 2 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 to create, combine text and picklist values, perform calculations, and more. For example, you can create a formula field that calculates the sum of two other fields. For more information, see [Formula Fields](#).

Previous Next Cancel

Setup Home Object Manager

## Details

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

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Triggers

Flow Triggers

### New Custom Field

Step 4 of 4

Field Label: Phone

Data Type: Phone

Field Name: Phone

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

Page Layouts

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Buttons, Links, and Actions

Compact Layouts

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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

Setup > OBJECT MANAGER

## Details

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

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Triggers

Flow Triggers

### New Custom Field

Help for this Page

Step 2 of 4

Step 2: Enter the details

Field Label:  (1)

Field Name:  (1)

Description:

Help Text:  (1)

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 (1)

Default Value:

Use formulas, picklists, Enclose text and picklist value API names in double quotes ("file\_name"). Include numbers without quotes (10). When percentages do decimals (0.15), and express date calculations in the standard format (Today) + 7. To reference a field from a Custom Metadata type record use \$CustomMetadataType\_\_c.recordName.Field\_\_c

Previous Next Cancel

Setup > OBJECT MANAGER

## Details

Details

Fields & Relationships

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Buttons, Links, and Actions

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Restriction Rules

Scoping Rules

Triggers

Flow Triggers

### New Custom Field

Step 4. Add to page layouts Step 4 of 4

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 ☐ 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

Page Layouts

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Record Types

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Scoping Rules

Triggers

Flow Triggers

☐ Checkmark

☐ 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.

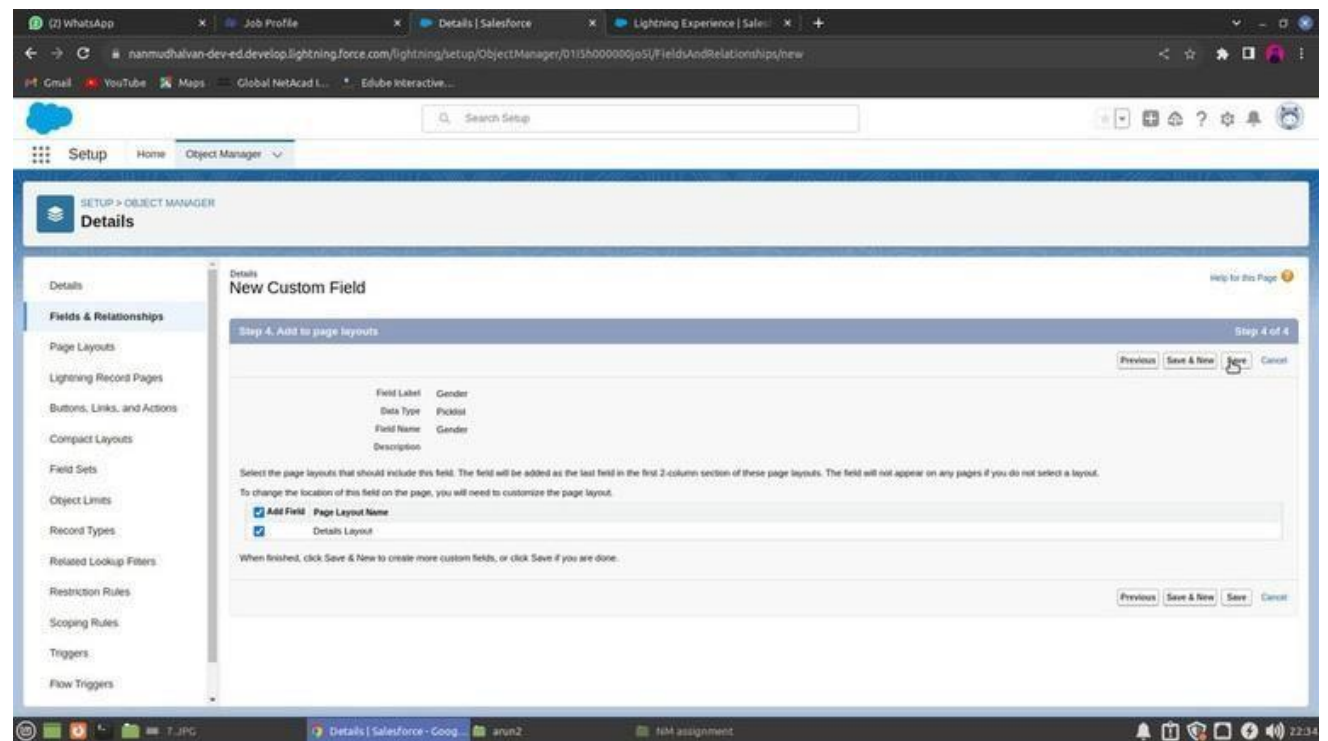
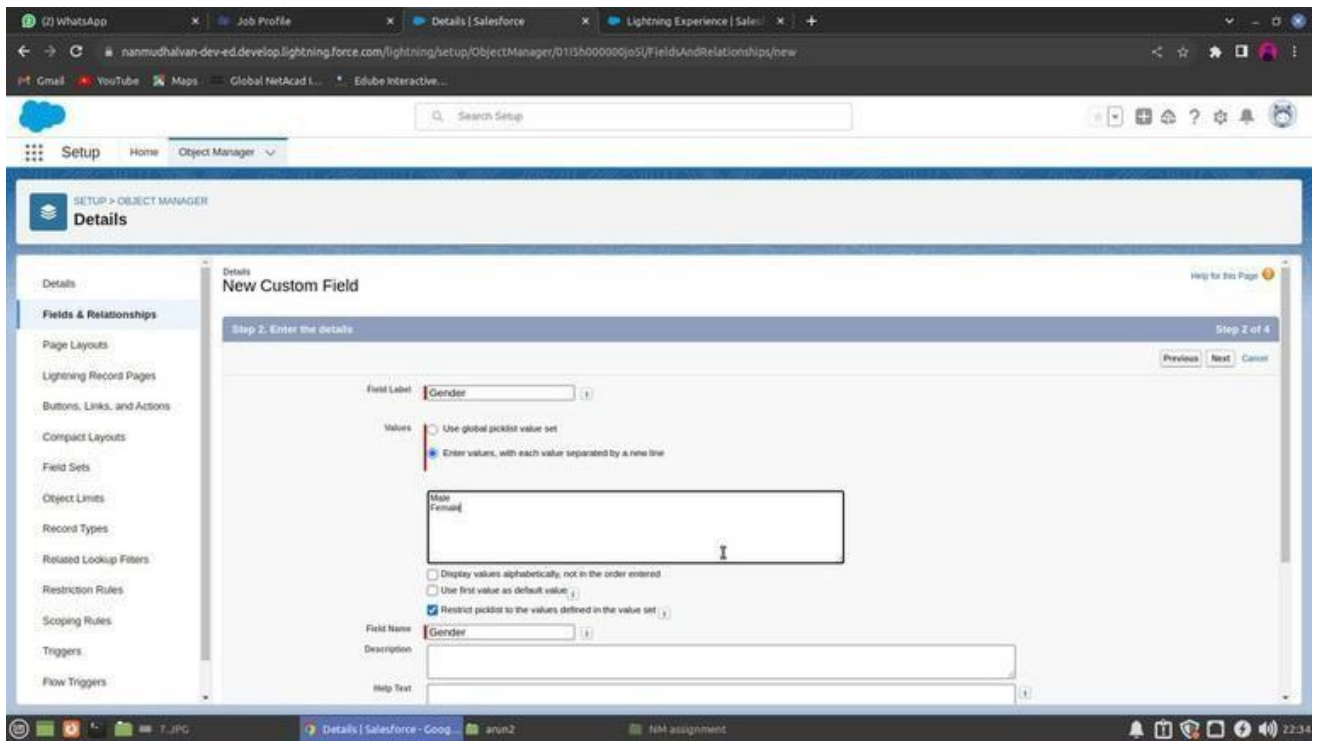
Allows users to enter any combination of letters and numbers and store them in encrypted form.

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](#)







Screenshot of the Salesforce Setup page, specifically the "Details" section for an object. The page shows a list of fields and their relationships.

**Fields & Relationships**

8 Items, Sorted by Field Label

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		

Screenshot of the Salesforce Setup page, specifically the "New Custom Object Tab" wizard. The page shows the "Step 1. Enter the Details" section.

**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: 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: [Text Box]

Setup | Home | Object Manager

Search Setup

Setup

Custom Tabs

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

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

Custom Object Tabs

Action	Label	Tab Style	Description
Edit   Del	Colours	Building Block	
Edit   Del	Departments	Credit card	
Edit   Del	Details	Lightning	
Edit   Del	Facilities	Diagram	
Edit   Del	Finance products	Lightning	
Edit   Del	Inventories	CD/DVD	
Edit   Del	out customers	Route	
Edit   Del	Properties	Apparel	
Edit   Del	retailing	Highway Sign	
Edit   Del	Skincare products	Star	
Edit   Del	Students	Triangle	

Setup | Home | Object Manager

Search Setup

Setup

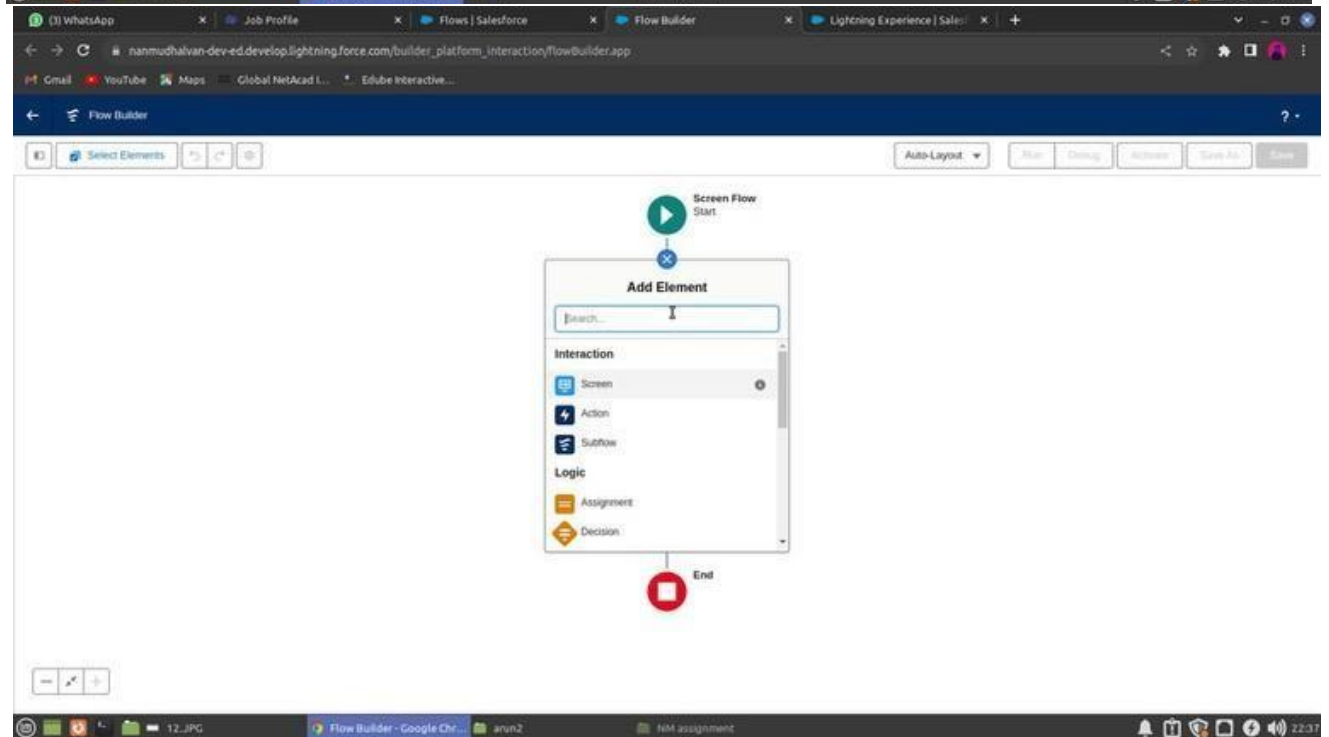
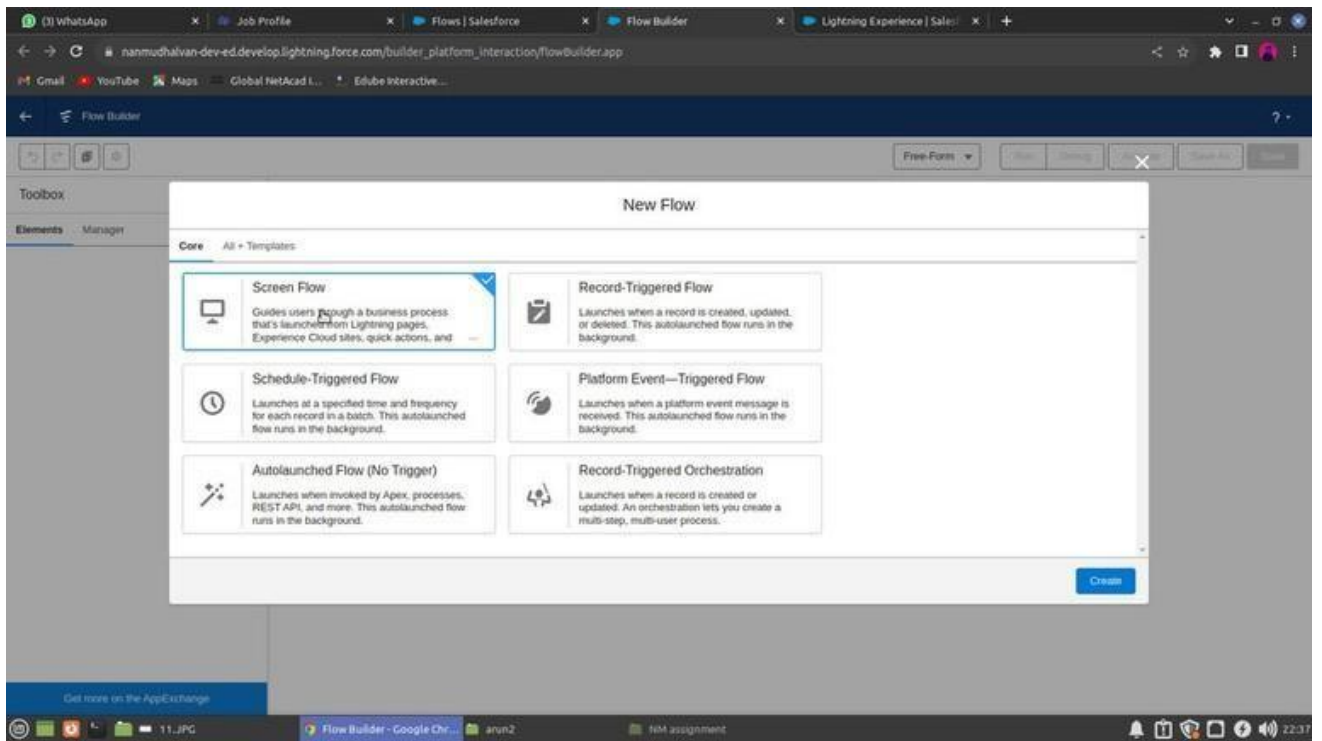
Flows

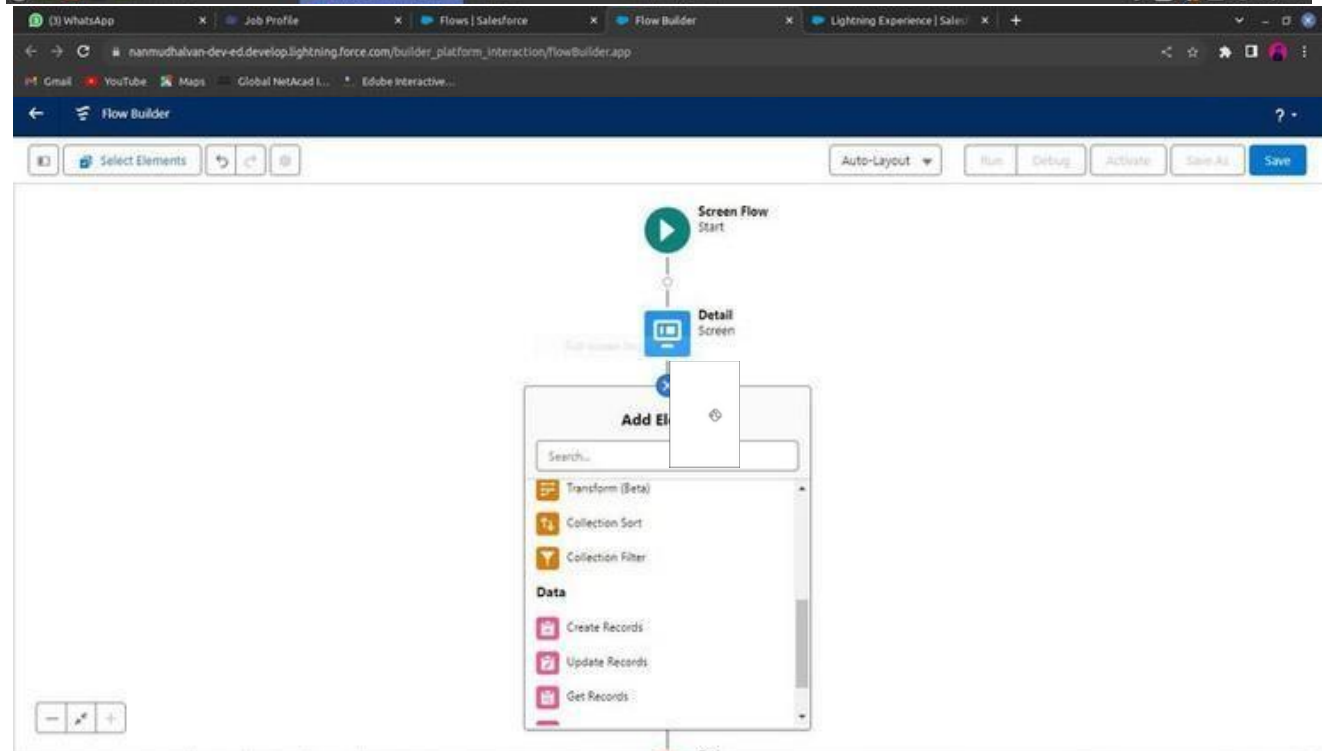
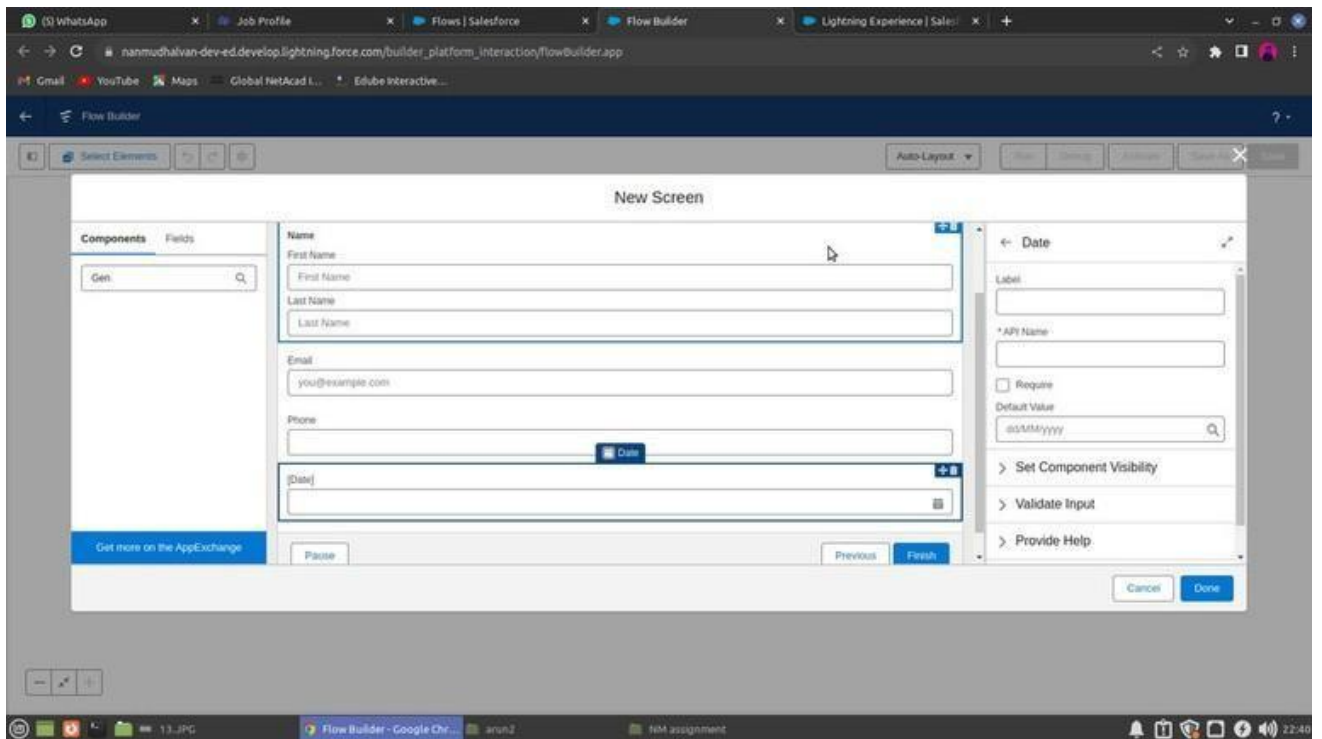
Flow Definitions

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			
Consultantec	Screen Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Unmanaged		Aymal 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 interface showing a flow diagram and configuration options.

**Flow Diagram:**

- Screen Flow Start
- Detail Screen
- Details1 Create Records
- End

**Configuration Panel:**

Use separate resources and literal values

Create a Record of This Object

\*Object: Details

Set Field Values for the Details

Field	Value
Name	A <sub>3</sub> Name X
Email_c	A <sub>3</sub> Email > Value X
Phone_c	A <sub>3</sub> Phone > Value X
Date_c	Date X
Gender_c	A <sub>3</sub> Gender X

+ Add Field

☐ Manually assign variables

Details12

Name: Vignesh

Email: Vigneshc0987@gmail.com

Phone: 1234567890

Date: 18-Oct-2023

Gender: male

Next



3) WhatsAppJob ProfileFlows | SalesforceFlow BuilderLightning Experience | Sales

nanmudhalvan-dev-ed.develop.lightning.force.com/builder\_platform\_interaction/flowBuilder.app

GmailYouTubeMapsGlobal NetAcad Ecube Interactive

Search

My-appCollegeDepartmentDetails

Details

sanjay

New ContactEditNew Opportunity

RelatedDetails

Details Name

Owner

Full screen image

Avignesh

Avignesh

Email

Vigneshc0987@gmail.com

Phone

1234567890

Date

18/10/2023

Gender

Male

Created By

Last Modified By

Avignesh-8/10/2023, 3:42 pm

Avignesh-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.

The screenshot shows the Salesforce 'New Custom Object' setup page. The browser tabs include 'WhatsApp', 'Job Profile', 'New Custom Object | Sales...', and 'Lightning Experience | Sales...'. The URL is 'nanmudhalvan-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new'. The page title is 'New Custom Object'. A yellow banner at the top states: '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](#)'. Below this is the 'Custom Object Definition Edit' section with 'Save', 'Save & New', and 'Cancel' buttons. The 'Custom Object Information' section includes fields for 'Label' (Example: Account), 'Plural Label' (Example: Accounts), 'Starts with vowel sound' (checkbox), 'Object Name' (Example: Account), and 'Description'. At the bottom, there are 'Context-Sensitive Help Setting' options: 'Open the standard Salesforce.com Help & Training window' (selected) and 'Open a window using a Visualforce page'. A 'Content Name' dropdown is also present. A footer note explains the 'Record Name' field: 'The Record Name appears in page layouts, key lists, related lists, analyses, 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/lightning/setup/CustomTabs/page/address+%2Fsetup%2Fui%2FobjectCustomTabWizard.jsp%3FretURL%3D%252Fsetup%252Fui%252Fcustom...

Setup Home Object Manager

Search Setup

Setup Tabs

### New Custom Object Tab

Step 1 of 3

Step 1. Enter the Details

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

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

Object: Management

Tab Style: Camera

(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%3DCustomTab%26retURL%3D%252Fsetup%252Fui%252Fcustom...

Setup Home Object Manager

Search Setup

Setup Tabs

Custom Object Tabs

Action	Label	Tab Style	Description
Edit   Del	Colleges	Building Block	
Edit   Del	Departments	Credit card	
Edit   Del	Details	Lightning	
Edit   Del	Environments	Starboard	
Edit   Del	Esqurance products	Lightning	
Edit   Del	Inventories	CD/DVD	
Edit   Del	Managements	Camera	
Edit   Del	Our customers	Book	
Edit   Del	Proceedings	Airplane	
Edit   Del	retailers	Highway Sign	
Edit   Del	Skincare products	Star	
Edit   Del	Students	Triangle	

Web Tabs

No Web Tabs have been defined

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 bar: Search...

Navigation: My-app, Recently Viewed, College, Department, Details, Management

### Management

Recently Viewed

0 items • Updated a few seconds ago

Buttons: New, Import, Change Owner

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: nanudhalvan-dev-ed.develop.lightning.force.com/builder\_platform\_interaction/flowBuilder.app

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

Search bar: Search Setup

Navigation: Setup, Home, Object Manager

### 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

### Profiles

All Profiles | Edit | Delete | Create New View

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 | Previous Next

Page 1 of 1

Setup Home Object Manager

Search Setup

Hyperforce Assistant

Users

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Mass Transfer Approval Requests

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Prospector Preferences

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Products

Asset Settings

## SETUP Profiles

Profile Edit Manager

Set the permissions and page layouts for this profile.

Profile Edit

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"/>	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

Hyperforce Assistant

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Asset Settings

## 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
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"/>
Department	<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



Setup Home Object Manager

Search Setup

Profiles

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.

[Login IP Ranges](#) | [Enabled Apex Class Access](#) | [Enabled Validation 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](#) [Delete](#) [View Users](#)

Name	Manager	Custom Profile	<input checked="" type="checkbox"/>
User License	Salesforce Platform		
Description			
Created By	Admin	Modified By	Admin
Created	16/10/2023, 3:47 pm	Modified	16/10/2023, 3:48 pm

**Page Layouts**

Standard Object Layouts	Global	Global Layout <a href="#">View Assignment</a>	Object Milestone	Object Milestone Layout <a href="#">View Assignment</a>
Email Application	Not Assigned	<a href="#">View Assignment</a>	Operating Hours	Operating Hours Layout <a href="#">View Assignment</a>
Home Page Layout	Home Page Default		Order	Order Layout

Setup Home Object Manager

Search Setup

Users

New User

User Edit [Save](#) [Save & New](#) [Cancel](#)

**General Information**

First Name	manager	Role	Marketing Team
Last Name	1	User License	Salesforce Platform
Alias	m1	Profile	Manager
Email	manager.aaa@gmail.com	Active	<input checked="" type="checkbox"/>
Username	manager.aaa@gmail.com	Marketing User	<input checked="" type="checkbox"/>
Nickname	User1697624338709764377	Offline User	<input type="checkbox"/>
Title		Knowledge User	<input type="checkbox"/>
Company		Flow User	<input type="checkbox"/>
Department		Service Cloud User	<input type="checkbox"/>
Division		Site.com Contributor User	<input type="checkbox"/>
		Site.com Publisher User	<input type="checkbox"/>
		WDC User	<input type="checkbox"/>

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

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: 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.

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

### Permission Sets

Help for this Page

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"/> 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	CMD 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

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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](#)

Setup Home Object Manager

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Assignment Policies

Salesforce Scheduler

### SETUP Permission Sets

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	<input type="checkbox"/>	Created By	apex_d, 10/10/2023, 3:52 pm
Permission Set Groups Added To		Last Modified By	apex_d, 10/10/2023, 3:52 pm

#### Apps

**Assigned Area**  
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**

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](#)

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Salesforce Scheduler

### SETUP Permission Sets

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

Setup

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Salesforce Scheduler

Assignment Policies

Salesforce Scheduler

### Select Users to Assign

All Users

1 item selected

Search this list...

	Full Name	AI...	Username	Role	A...	Profile
<input type="checkbox"/>	Vignesh	AJ	vignesh12345@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.com		<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

Setup

Search Setup

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

### 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

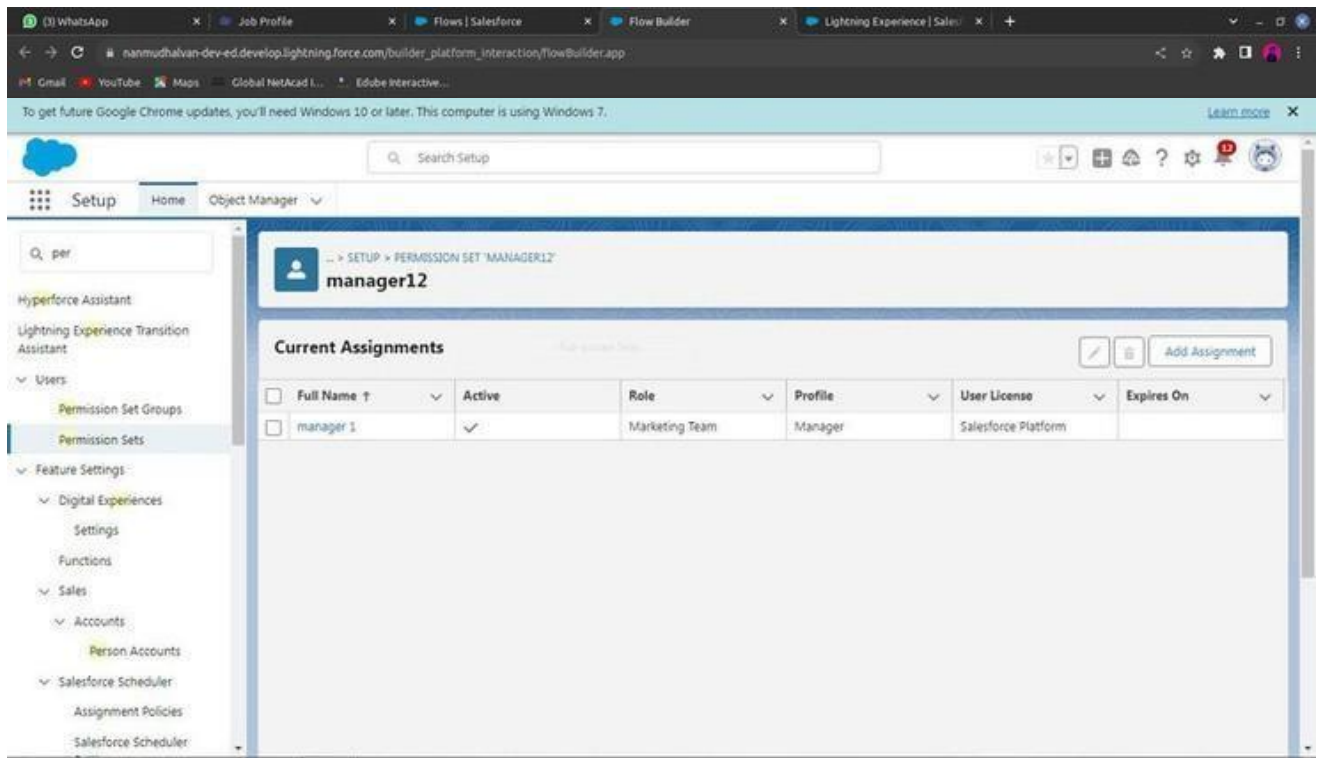
Full Name	Role	Profile	Active	User License	Expires On
manager 1	Marketing Team	Manager	<input checked="" type="checkbox"/>	Salesforce Platform	Never Expires

Cancel

Back

Assign





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



Lightning Experience | Sales

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

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 page layouts, new lists, related lists, linkages, 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.

Lightning Experience | Sales

nanmudhalvan-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2FobjectCustomTabWizard.jsp%3FretURL%3D%252F015h0000000070%253Fset...

Setup Home Object Manager

Search Setup

Setup Tabs

## New Custom Object Tab

Step 1 of 3

### Step 1. Enter the Details

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

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

Object

Tab Style

(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

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/015h000000j07D/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

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 | +

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. [Tell me more!](#) [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, tab 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.

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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

Full-screen help

Next Cancel

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 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.

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

Full-screen help

Help for this Page

Step 6 of 6

Step 6. Add custom related lists

Previous Save & New Save Cancel

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

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

Related List Label Customer

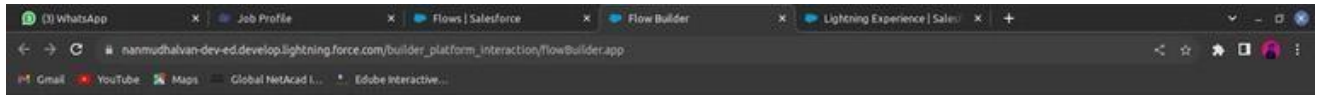
These are the page layouts that will include this field. Because this is a Master-Detail relationship, the field is required:

Add Related List Page Layout Name

☒ Bank Layout

☒ Append related list to users' existing personal customizations

Previous Save & New Save Cancel



**Profiles**

**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.

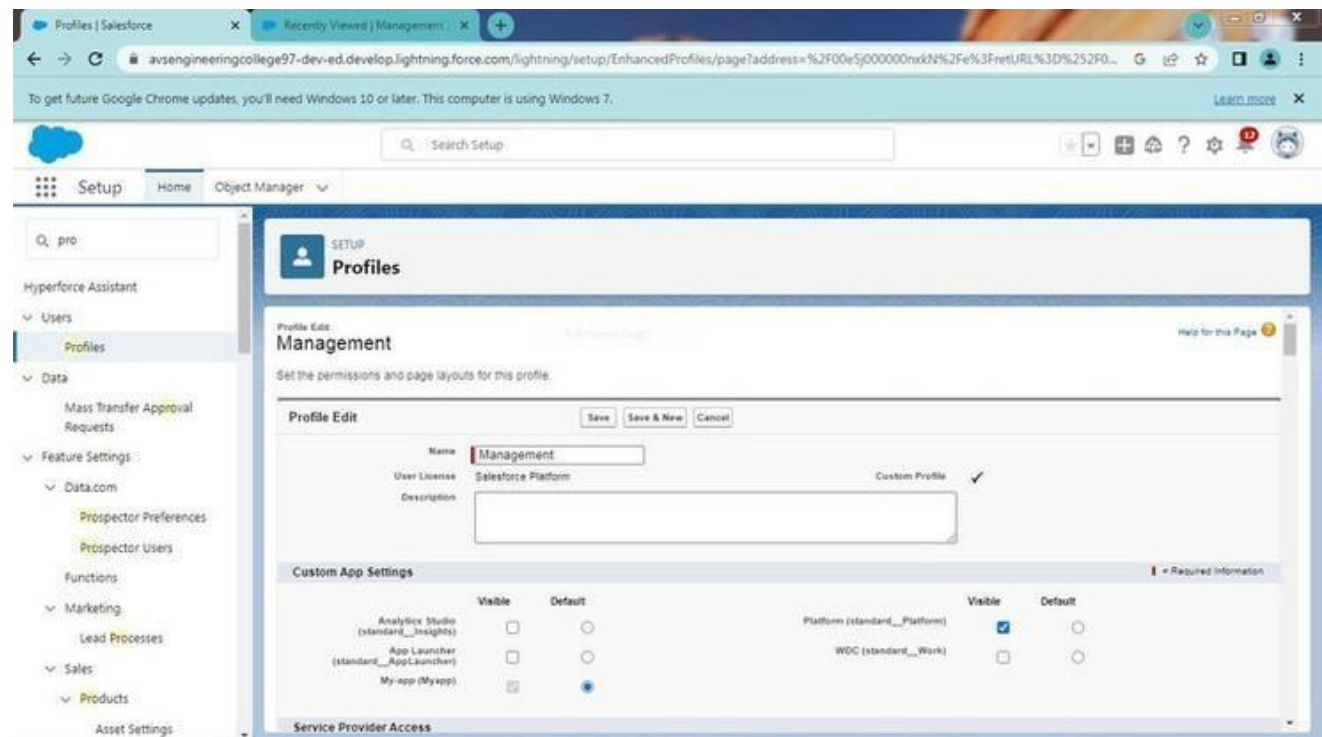
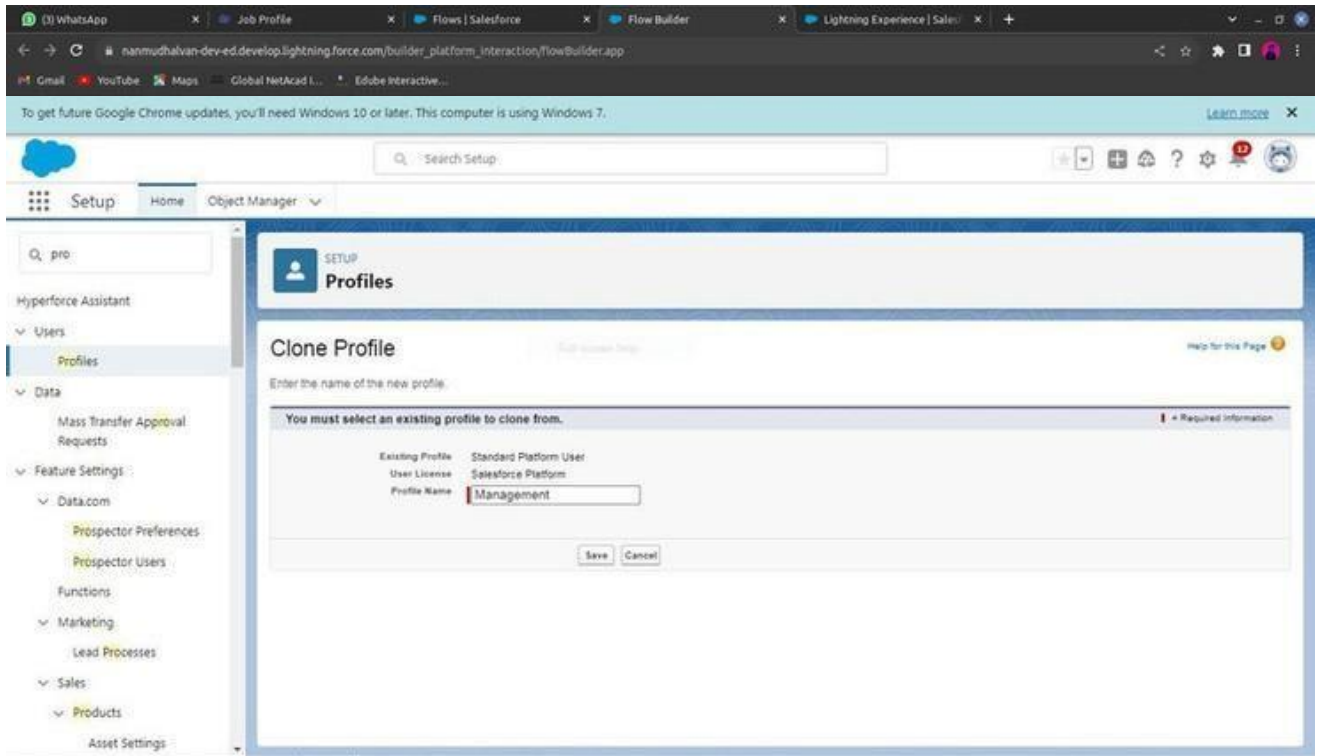
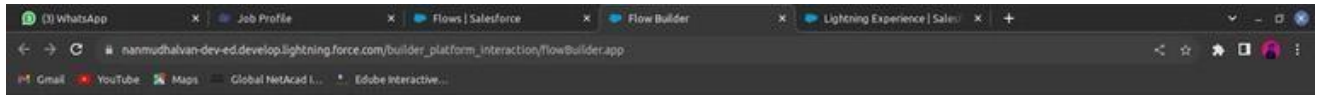
[Login IP Ranges](#) | [Enabled Apex Class Access](#) | [Enabled Validation Rule Access](#) | [Enabled External Data Source Access](#) | [Enabled Named Credential Access](#) | [Enabled External Credential Provider Access](#) | [Enabled Custom Metadata Type Access](#) | [Enabled Custom Settings Definition Access](#) | [Enabled Flow Access](#) | [Enabled Service Presence Status Access](#) | [Enabled Custom Permissions](#)

**Profile Detail**

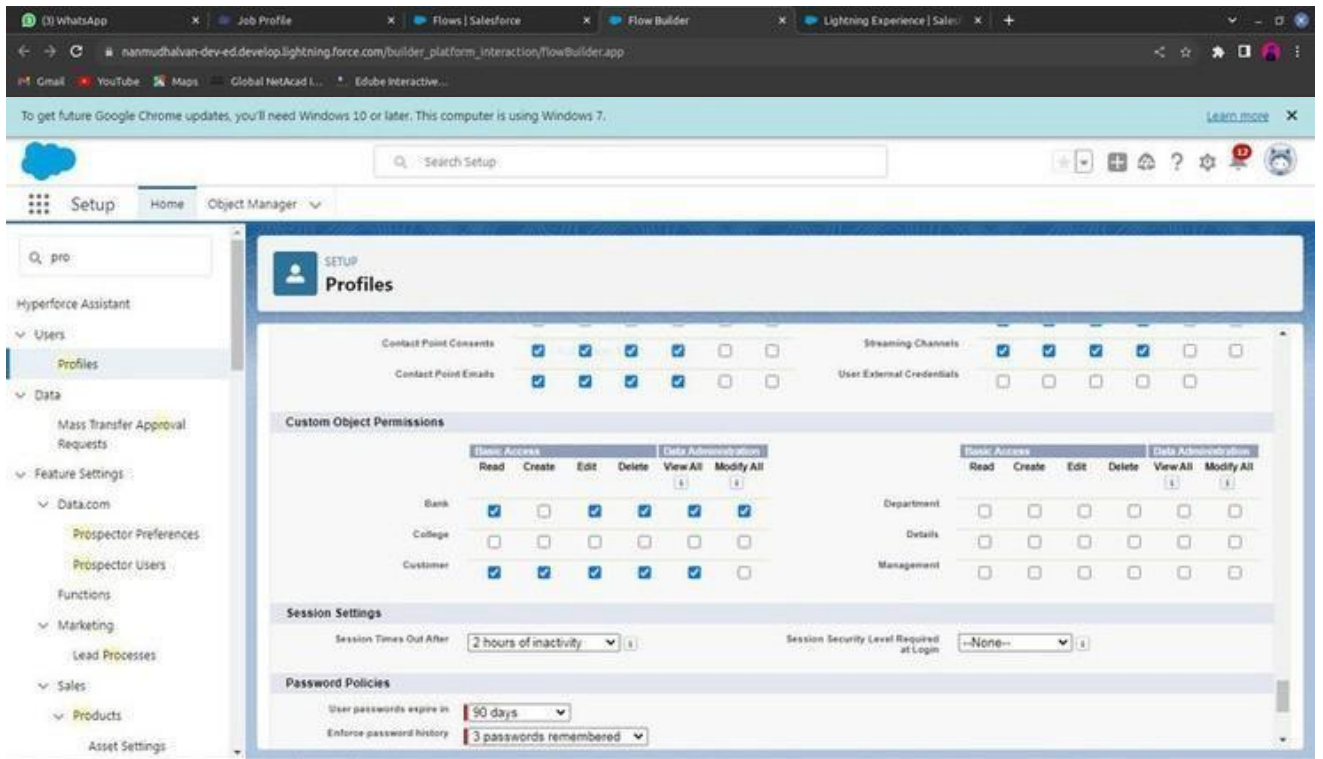
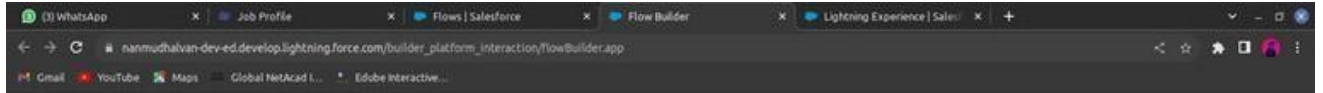
Name	User License	Custom Profile
Standard Platform User	Salesforce Platform	<input type="checkbox"/>
Created By	salesforce.com, inc. 17/10/2023, 10:41 am	
Modified By	Admin 18/10/2023, 3:34 pm	

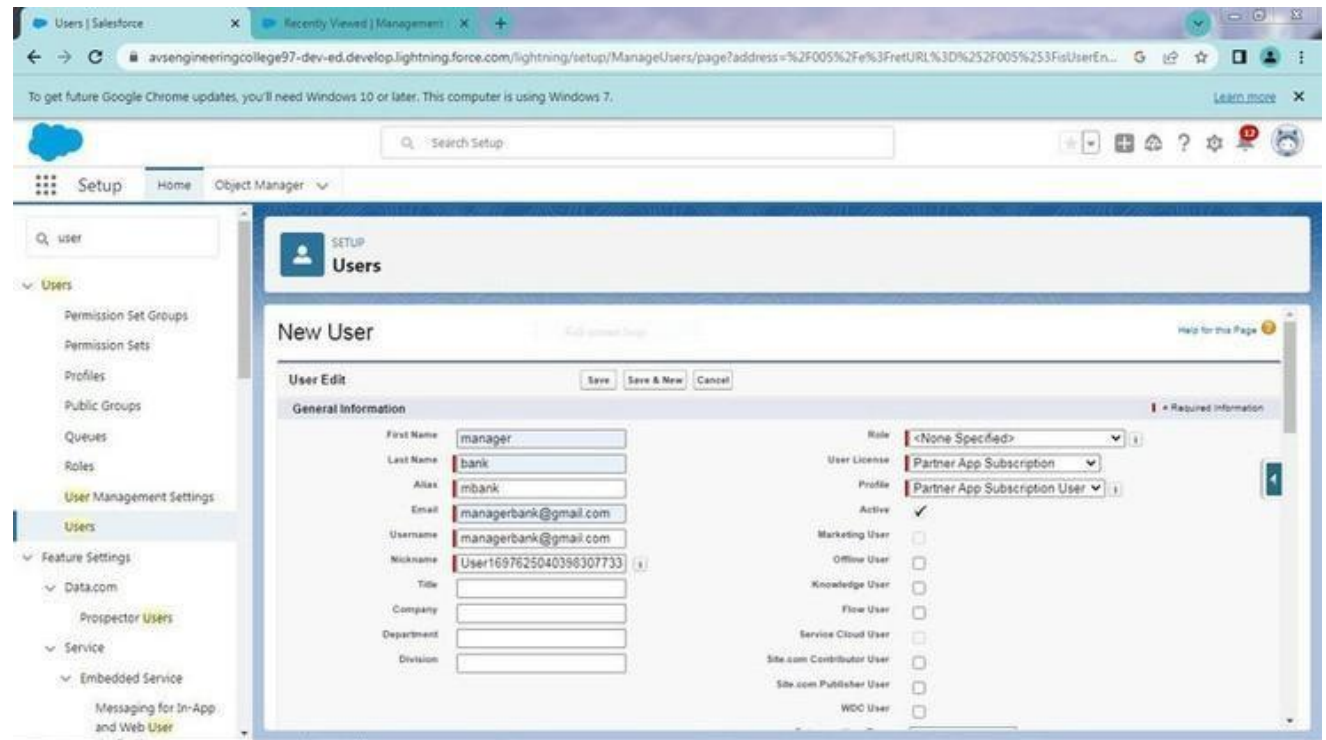
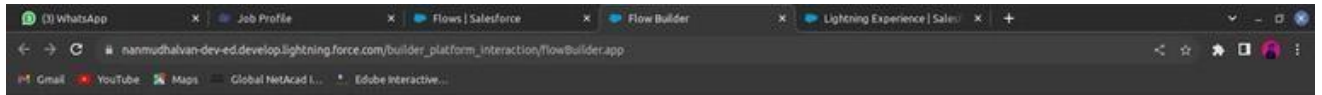
**Page Layouts**

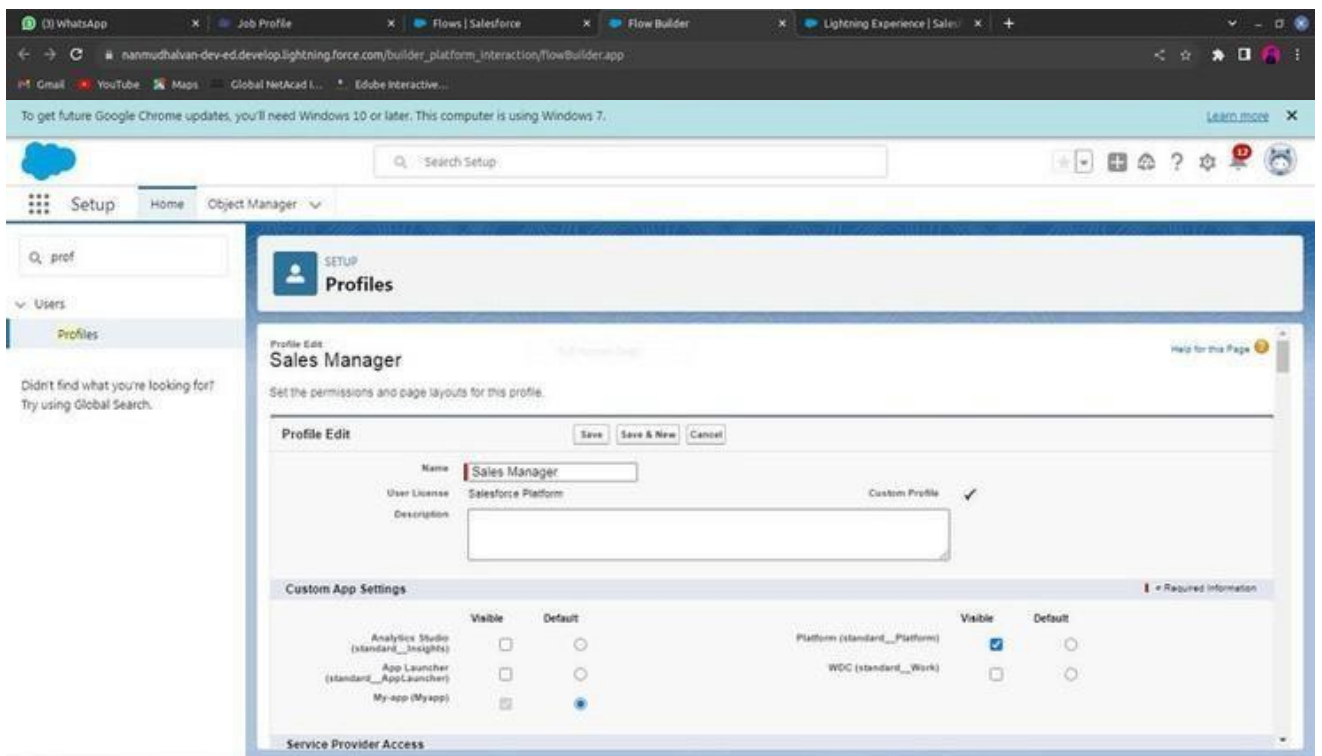
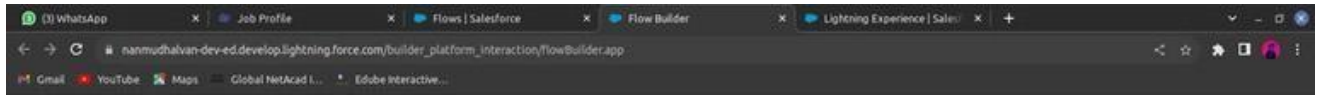
Standard Object Layouts	Global	Object Milestone
Global Layout	<a href="#">View Assignment</a>	<a href="#">Object Milestone Layout</a>
Email Application	Not Assigned	<a href="#">Operating Hours Layout</a>
Home Page Layout	Home Page Default	<a href="#">Order Layout</a>

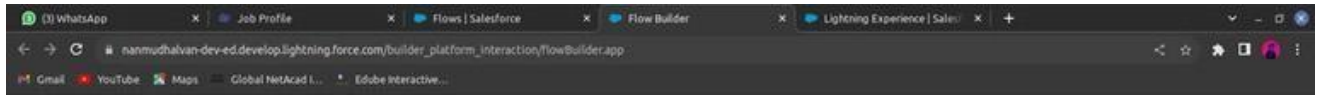












Profiles | Salesforce

Recently Viewed | Management

avsengineeringcollege97-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j000000nx0X%2Fe%3FretURL%3D%252F0...

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Search Setup

Setup Home Object Manager

Search: prof

Users

Profiles

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

### SETUP Profiles

Contact Point Addresses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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"/>

Sellers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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 checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
College	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
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"/>

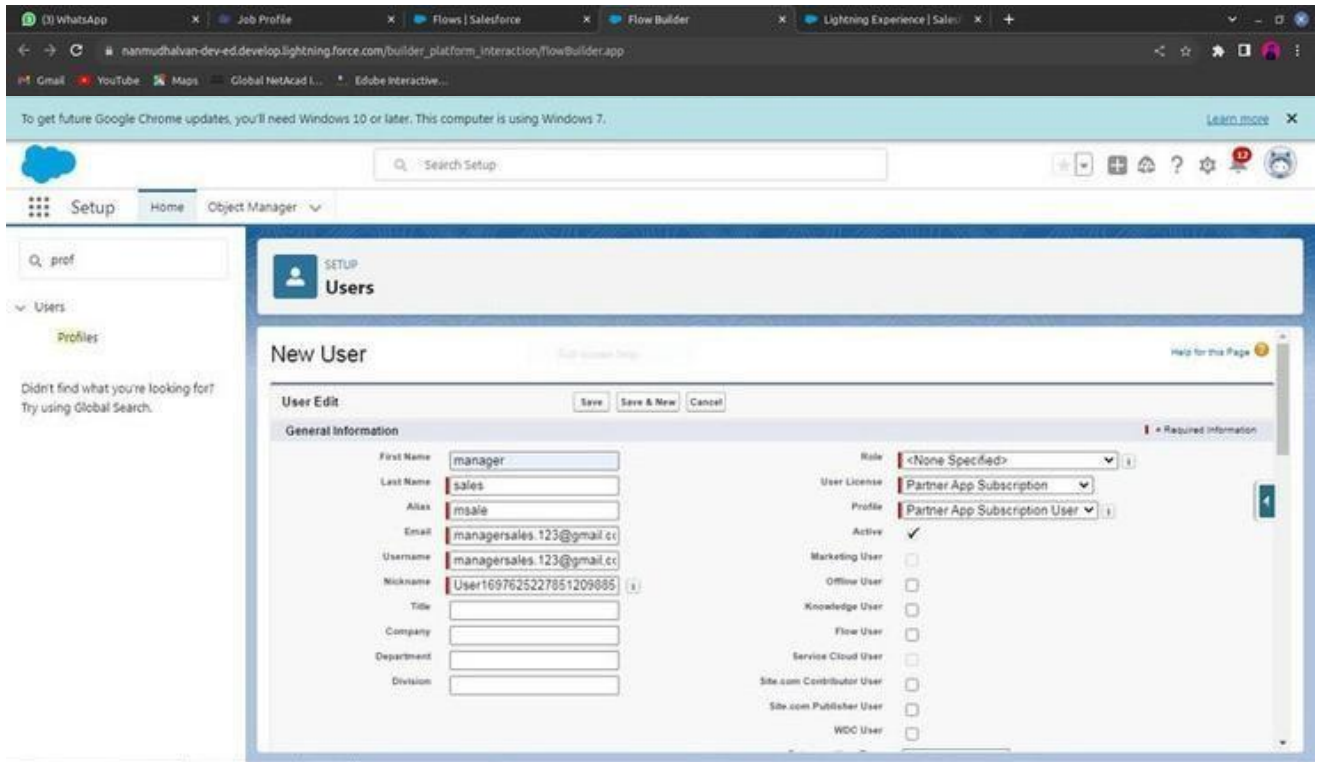
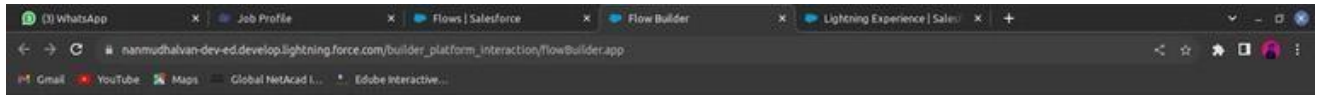
#### Session Settings

Session Times Out After:

Session Security Level Required at Login:

#### Password Policies

User passwords expire in:





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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"/>	Clone	Buyer	Allows access to the store. Lets users see products and...	B2B Buyer Permission Set One Seat
<input type="checkbox"/>	Clone	Buyer Manager	Includes all Buyer capabilities, and allows access to ma...	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 C3...	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

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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**

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

#### Permission Set Overview

Description	License	API Name	managerbanksales
Session Activation Required		Namespace Prefix	
Permission Set Groups Added To	0	Created By	admin, 15/10/2023, 4:06 pm
		Last Modified By	admin, 15/10/2023, 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**

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

Permission Set Overview Object Settings Accounts

#### Accounts

Save Cancel

#### Object Permissions

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

#### Field Permissions

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

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

Address bar: nanmudhalvan-dev-ed.develop.lightning.force.com/builder\_platform\_interaction/flowBuilder.app

Notification: 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

Search: per

Left sidebar menu:

- 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

Table: All Users

1 item selected

Search this list...

	Full Name ↑	AL...	Username	Role	A...	Profile
<input type="checkbox"/>	Vignesh		arunj@123gmail.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Chatter Expert	Chatter	chatty00d3j00000dq4hgast13yy9pn4y4nm@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@00d3j00000dq4hgast.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	manager 1	m1	managerabc.abc@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Manager
<input type="checkbox"/>	manager 2	m2	managervyzxyz@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...

Buttons: Cancel, Next

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

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, Delete, Copy, Edit, Print

Total Life Time Value	Name
Full-screen Snap	
You haven't viewed any Customers recently. Try switching list views.	