

Naan Mudhalvan
Salesforce Developer(Course)
Assignment

Name : KAVITHA M
Naan Mudhalvan id : au620120104046
Year & Dep : IV Year & CSE
Batch : 2024
Zone no : Zone 8

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

WhatsApp

New Custom Object | Sales

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

GmailYouTubeMapsGlobal NetAcad...Edube Interactive...

Setup

Home

Object Manager

Search Setup

Help for this Page

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

SaveSave & NewCancel

Custom Object 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 | SalesSales Force Developer assi...Salesforce

20:56

WhatsApp

New Custom Object | Sales

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

GmailYouTubeMapsGlobal NetAcad...Edube Interactive...

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SaveSave & NewCancel

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

LabelDepartmentExample: Account

Plural LabelDepartmentsExample: Accounts

Starts with vowel sound☐

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Object NameDepartmentExample: Account

Description

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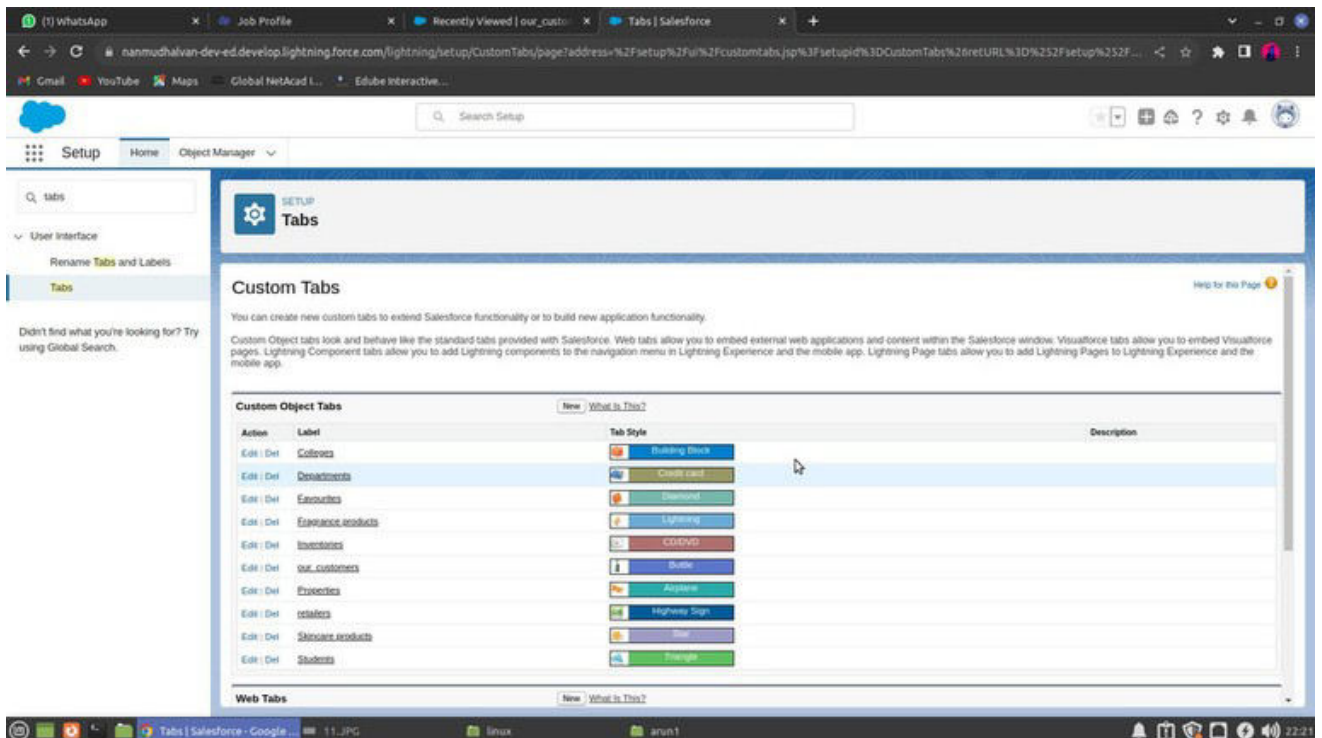
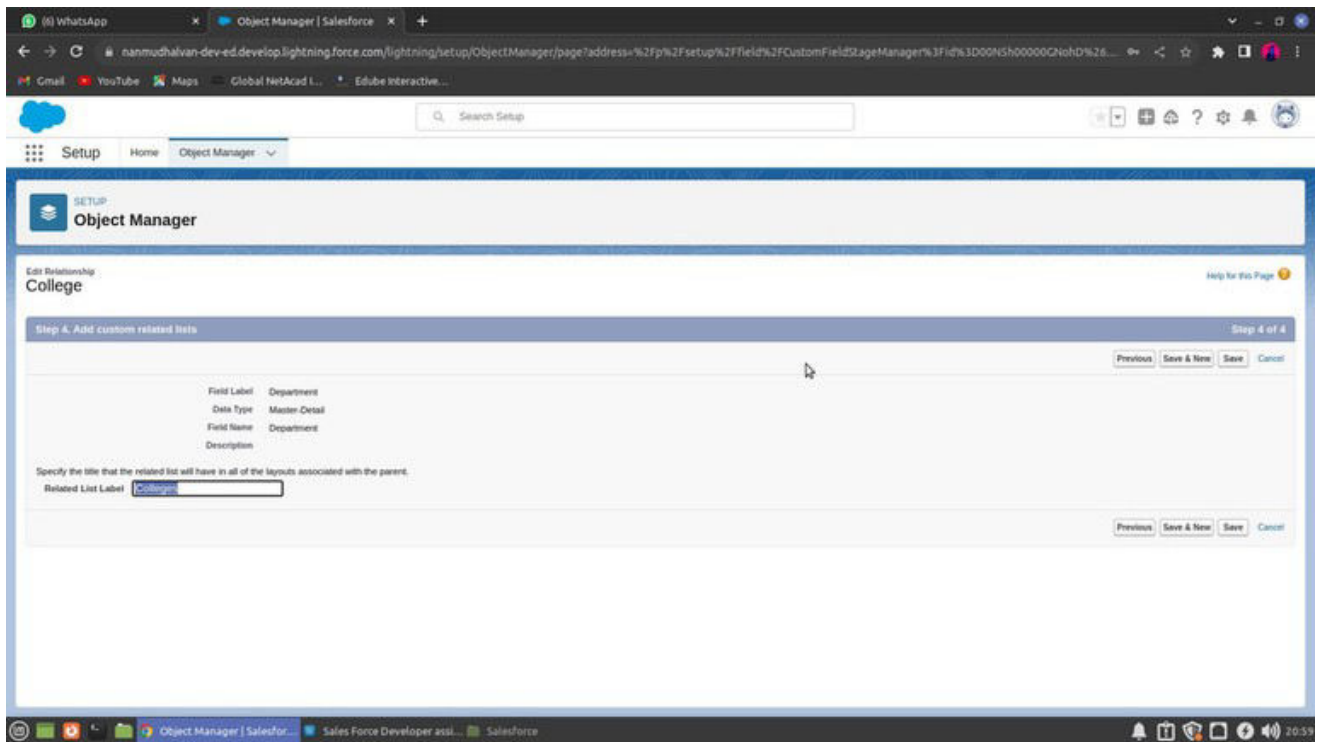
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Enter Record Name Label and Format

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New Custom Object | SalesSales Force Developer assi...Salesforce

20:57



nanmodhalvan-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0113h00000jnJJ/FieldsAndRelationships/new

Setup Home Object Manager

SETUP > OBJECT MANAGER

Department

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

- ☐ 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 report 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

nanmodhalvan-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0113h00000jnJJ/FieldsAndRelationships/new

Setup Home Object Manager

SETUP > OBJECT MANAGER

Department

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

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Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

New Custom Field

Step 2: Enter the details

Step 2 of 4

Field Label: Dept_email

Field Name: Dept_email

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: Formula text and picklist value left names in double quotes. {PICKLIST} include picklist values without quotes. {DATE} show percentages as decimals. {DATE} and response date calculations in the standard format. {TODAY} + 7. To reference a field from a Custom Metadata type record use: \$CustomMetadataType__my_record__FieldName__c

Previous Next Cancel

Setup > OBJECT MANAGER

Department

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Fields & Relationships

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Buttons, Links, and Actions

Compact Layouts

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Flow Triggers

- ☐ Currency
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- ☐ Percent
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- ☐ 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.

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Cancel

Setup > OBJECT MANAGER

Department

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Department

New Custom Field

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 formula syntax: Enclose text and visible 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} + 1. To reference a field from a Custom-Related type record use: {Custom-RelatedType__r}. {Custom-RelatedTypeField__c}

Previous Next Cancel

Setup > OBJECT MANAGER
Department

Details

Fields & Relationships

7 items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Department Name	Name	Text(80)		✓
Dept_email	Dept_email__c	Email		
Dept_No.	Dept_No__c	Phone		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Total_Count	Total_Count__c	Roll-Up Summary (COUNT College)		

Setup > OBJECT MANAGER
Department

Details

Fields & Relationships

Roll-up Summary

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.

Setup Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Department

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

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

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

Add Related List	Page Layout Name
<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

College 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.

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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.

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- 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.

Setup Search Setup

Setup Home Object Manager

College

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

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Search Layouts

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(30)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(UserGroup)		✓
Total Count	Total_Count__c	Roll-Up Summary (COUNT Department)		

Setup Search Setup

Setup Home Object Manager

app m

Apps

App Manager

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

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

Search Setup

Apps

User Interface

App

Didn't find what you were looking for? Use the Global Search bar.

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

Next

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

Search Setup

Apps

User Interface

App

Didn't find what you were looking for? Use the Global Search bar.

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

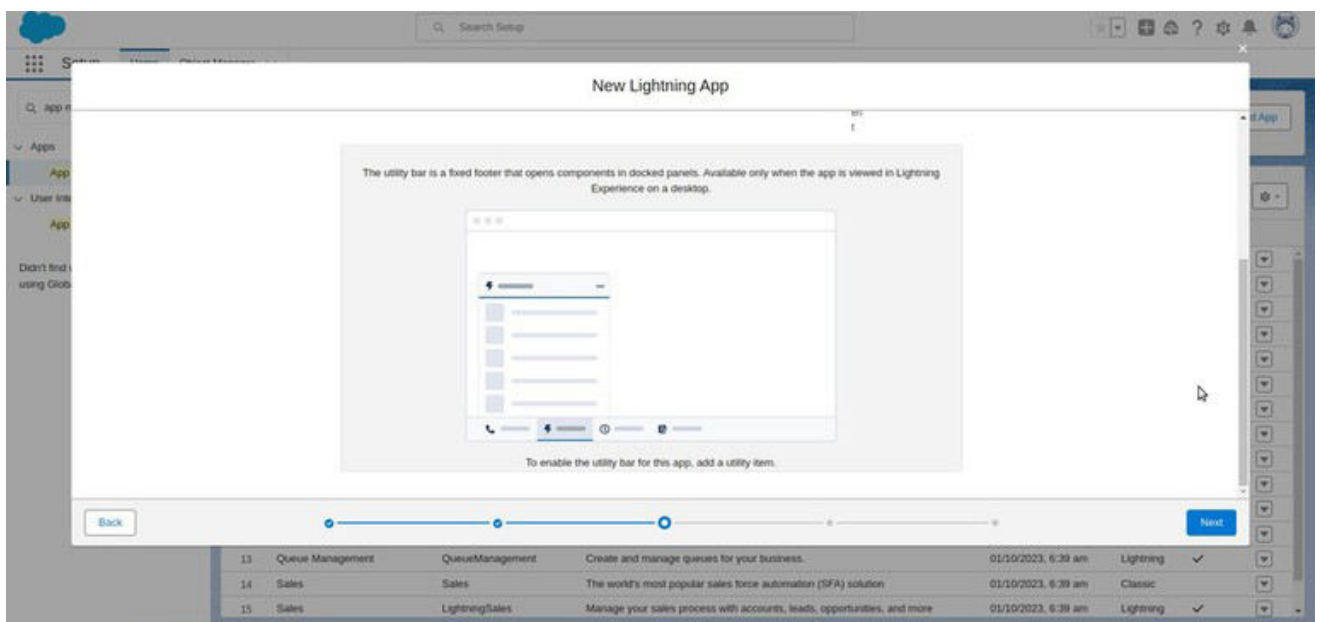
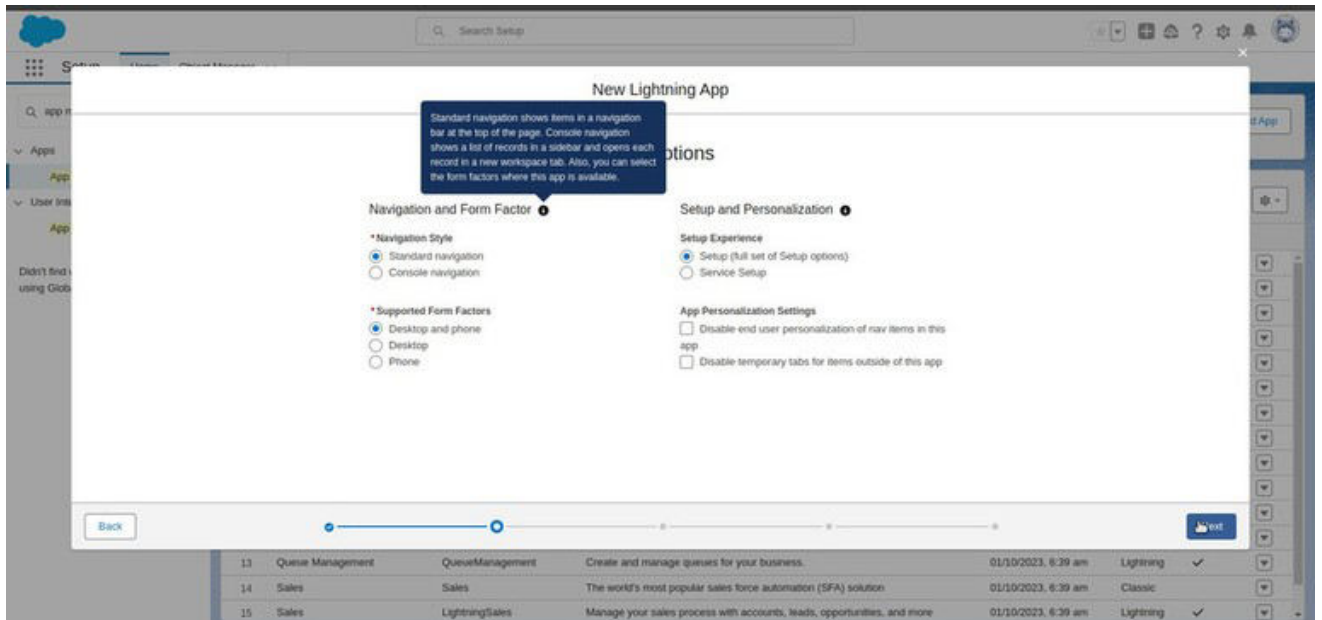
Org Theme Options

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

App Launcher Preview

Next

13	Queue Management	QueueManagement	Create and manage queues for your business.	01/10/2023, 6:39 am	Lightning	✓
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15	Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	01/10/2023, 6:39 am	Lightning	✓



New Lightning App

App Details

*App Name [?]
My_App

*Developer Name [?]
My_App

Description [?]
Enter a description...

App Branding

Image [?]
Upload

Primary Color Hex Value [?]
#0070D2

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

App Launcher Preview

My My_App

Next

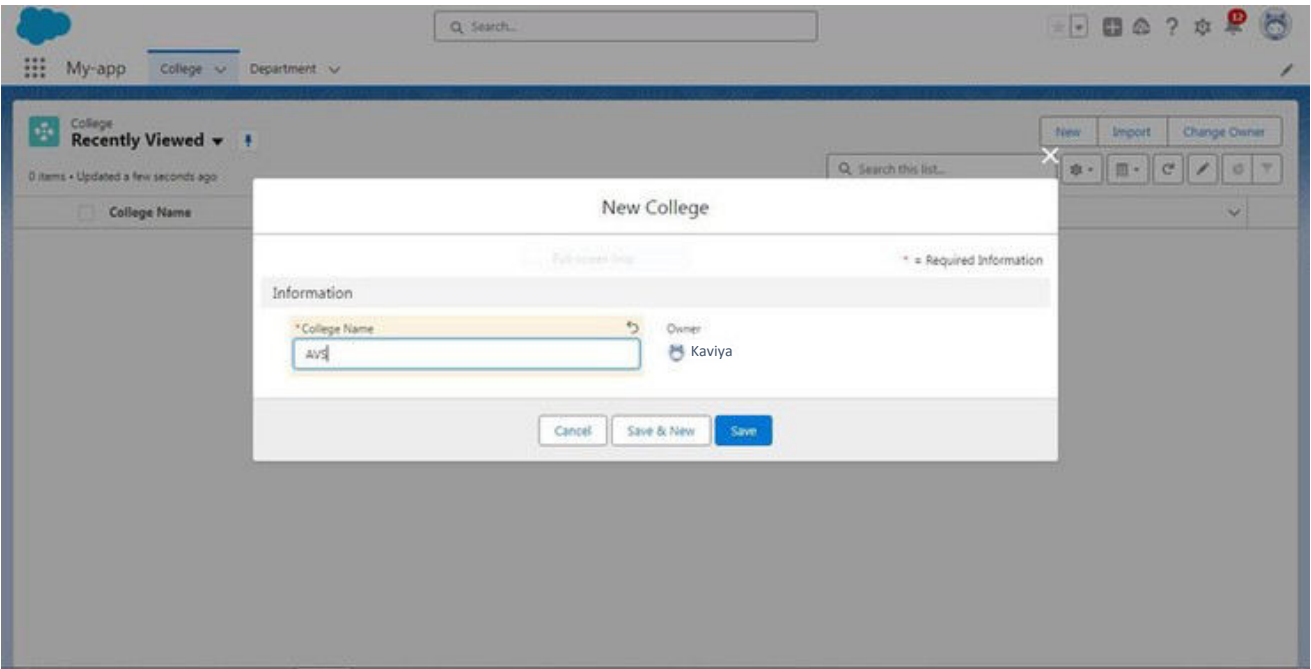
ID	Name	Label	Description	Created Date	Theme	Status
13	Queue Management	QueueManagement	Create and manage queues for your business.	01/10/2023, 6:39 am	Lightning	✓
14	Sales	Sales	The world's most popular sales force automation (SFA) solution	01/10/2023, 6:39 am	Classic	✓
15	Sales	LightningSales	Manage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


The screenshot shows the Salesforce Lightning App Builder interface. A modal window titled "New Lightning App" is open, displaying two panels: "Available Pages" and "Selected Pages".

- Available Pages:** Contains a search bar with "sy" and a list of pages, including "Salesforce API Only System Integrations".
- Selected Pages:** Contains a list of pages, including "System Administrator".

Below the panels is a progress bar with five steps, and a "Save & Finish" button. The background shows the Salesforce App Manager interface with a sidebar on the left and a table of Lightning App configurations at the bottom.

ID	Name	Page	Description	Created At	Version	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	✓














My-app

College

Department







College

AVS

New Contact

Edit

New Opportunity

Related

Details


College Name

AVS

Total Count


0

Owner

Kaviya


Full access, full

Created By


Kaviya

18/10/2023, 3:28 pm

Last Modified By

Kaviya








18/10/2023, 3:28 pm





My-app

College

Department







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

Edit

Email

cse@gmail.com

Edit

Phone

1234567899

Edit

College

AVS


Edit

Created By

Kaviya 18/10/2023, 3:29 pm

Last Modified By

Kaviya 18/10/2023, 3:29 pm










My-app

College

Department

Search...



College

AVS

New ContactEditNew Opportunity

Related

Details

College Name

AVS

Edit

Total Count

1

Created By

Kaviya 18/10/2023, 3:28 pm

Last Modified By

Kaviya 18/10/2023, 3:29 pm

Owner

Kaviya

Edit

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.

Browser tabs: (2) WhatsApp, Job Profile, New Custom Object | Salesforce, Lightning Experience | Salesforce

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

Search Setup

Setup Home Object Manager

SETUP New Custom Object

New Custom Object

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

Custom Object Definition Edit Save Save & New Cancel

Custom Object Information Required Information

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

Label: Example: Account

Plural Label: Example: Accounts

Starts with vowel sound ☐

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

Object Name: Example: Account

Description:

Context-Sensitive Help Setting

☒ Open the standard Salesforce.com Help & Training window

☐ Open a window using a Visualforce page

Content Name:

Enter Record Name Label and Format

The Record Name appears in page layouts, 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.

Taskbar: 1.JPG, New Custom Object | Sales..., arun2, NM assignment, 22:29

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

Address bar: nanmudhalvan-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0113h000000j0s1/Details/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER Details

Details Edit Delete

Details

Description:

API Name: Enable Reports ☐

Custom ☒ Track Activities ☐

Singular Label: Track Field History ☐

Plural Label: Deployment Status:

Help Settings:

Left Sidebar:

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

Taskbar: 2.JPG, Details | Salesforce - Goog..., arun2, NM assignment, 22:30

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)		✓

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

Setup > OBJECT MANAGER
Details

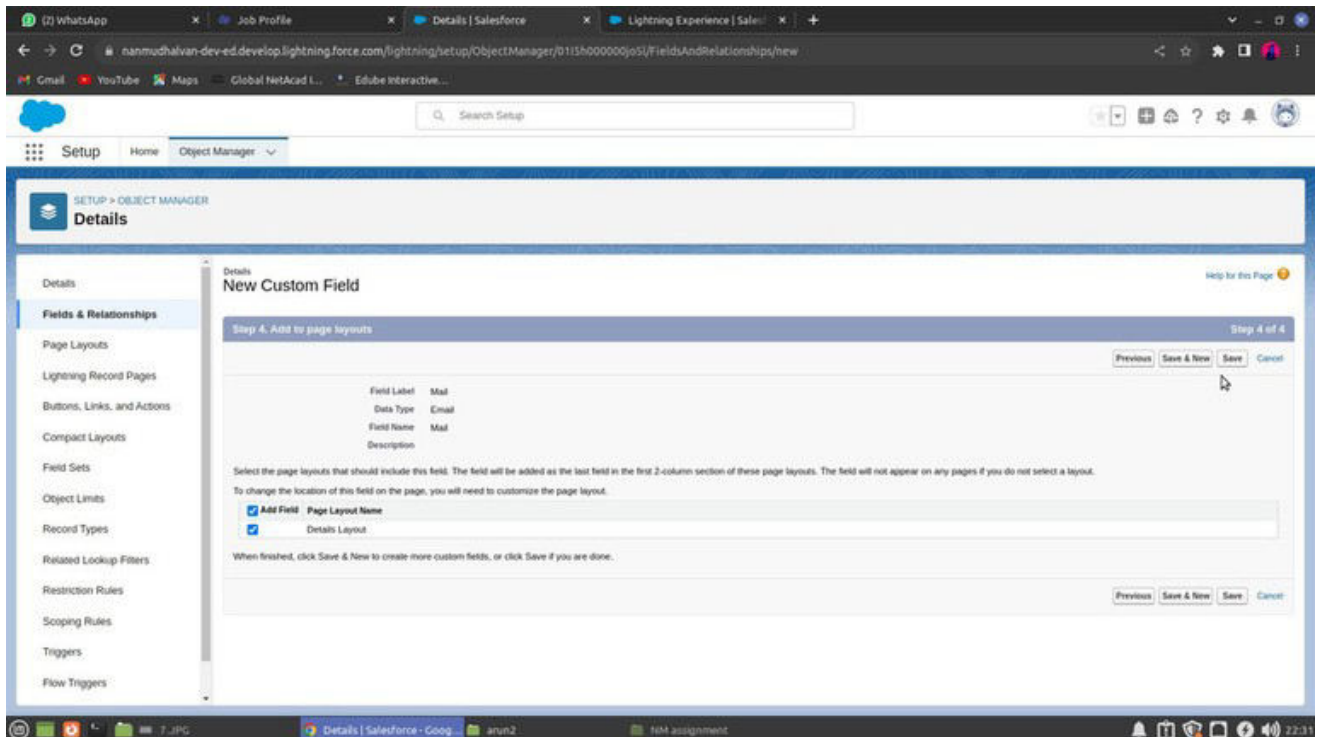
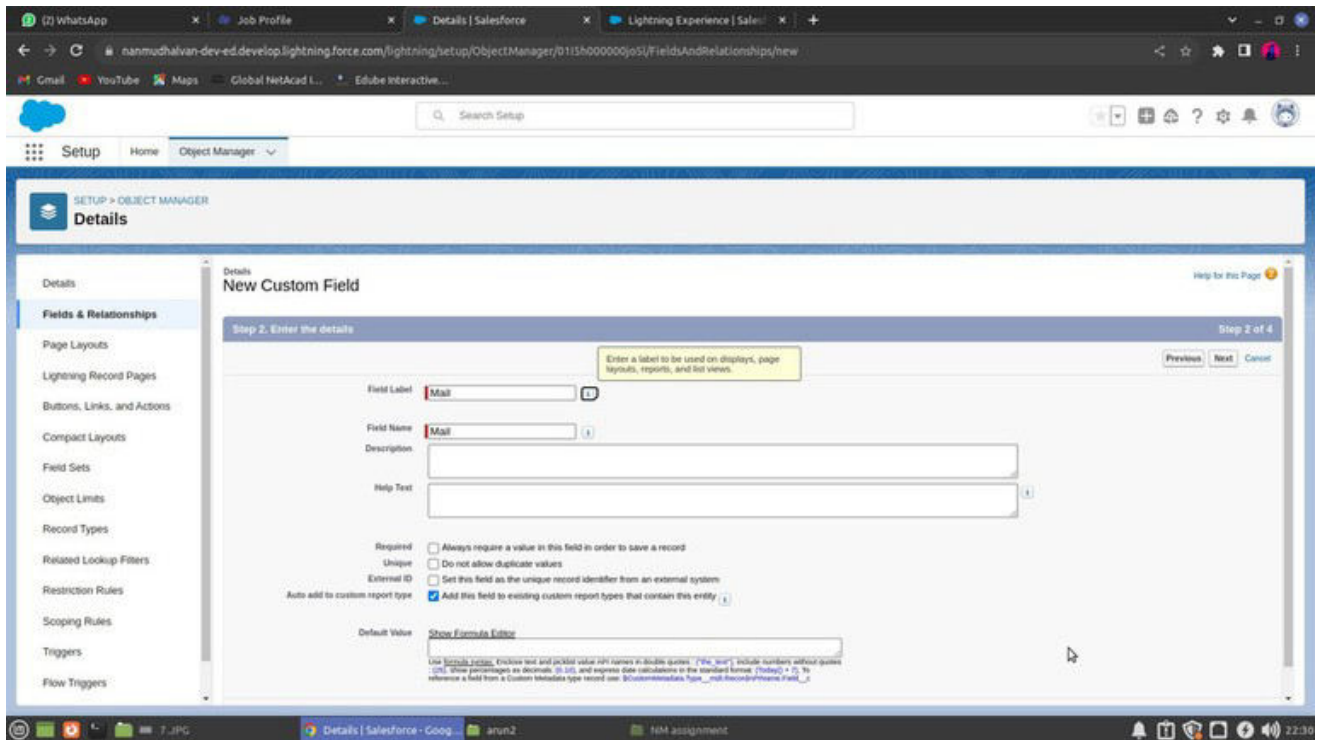
Fields & Relationships

Relationships

- ☐ Lookup Relationship
Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
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Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:
 - The ownership 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.

Field Types

- ☐ 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

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- ☐ 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, "15" 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

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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 formulas to create calculated fields. Enclose text and visible value API names in double quotes (""). Exclude numbers without quotes. Show percentages as decimals (0.25), and express date calculations in the standard format (Today) + 7. To reference a field from a Custom-Related type record, use: CustomRelatedType__r.FieldNameOrFormulaField__c

Previous Next Cancel

Setup > OBJECT MANAGER
Details

Details

New Custom Field

Step 4: Add to page layouts

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

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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.

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Flow Triggers

New Custom Field

Step 2: Enter the details

Field Label: Date

Field Name: Date

Description:

Help Text:

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

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

Default Value: Show Formula Editor

Use formula syntax. Enclose text and object value API names in double quotes (""). Include numbers without quotes. Use percentages as decimals (0.01), and express date calculations in the standard format: (Today) + 7. To reference a field from a Custom Metadata type record use: \$CustomMetadata.Type__c.\$CustomMetadataField__c

Previous Next Cancel

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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 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

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Flow Triggers

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

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

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

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

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

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

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

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

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

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

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

Allows users to enter any combination of letters and numbers.

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

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

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

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

Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:50.000" 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

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New Custom Field

Step 2. Enter the details

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:

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New Custom Field

Step 4 of 4

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

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

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

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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 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 page](#)

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%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 Blocks	
Edit Del	Donations	Credit card	
Edit Del	Details	Lightning	
Edit Del	Exercises	Document	
Edit Del	Expenditure products	Lightning	
Edit Del	Inventories	COVID	
Edit Del	our customers	Button	
Edit Del	Properties	AppIcon	
Edit Del	relations	Highway Sign	
Edit Del	Skincare products	Star	
Edit Del	Students	Triangle	

Setup | Home | Object Manager

Search Setup

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		Ajmal Akram	17/10/2023, 1:11 pm
Create a Case	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Create Order Summary Flow	Autolaunched Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Create Process Exception Flow	Autolaunched Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			

Flow 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 ...

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

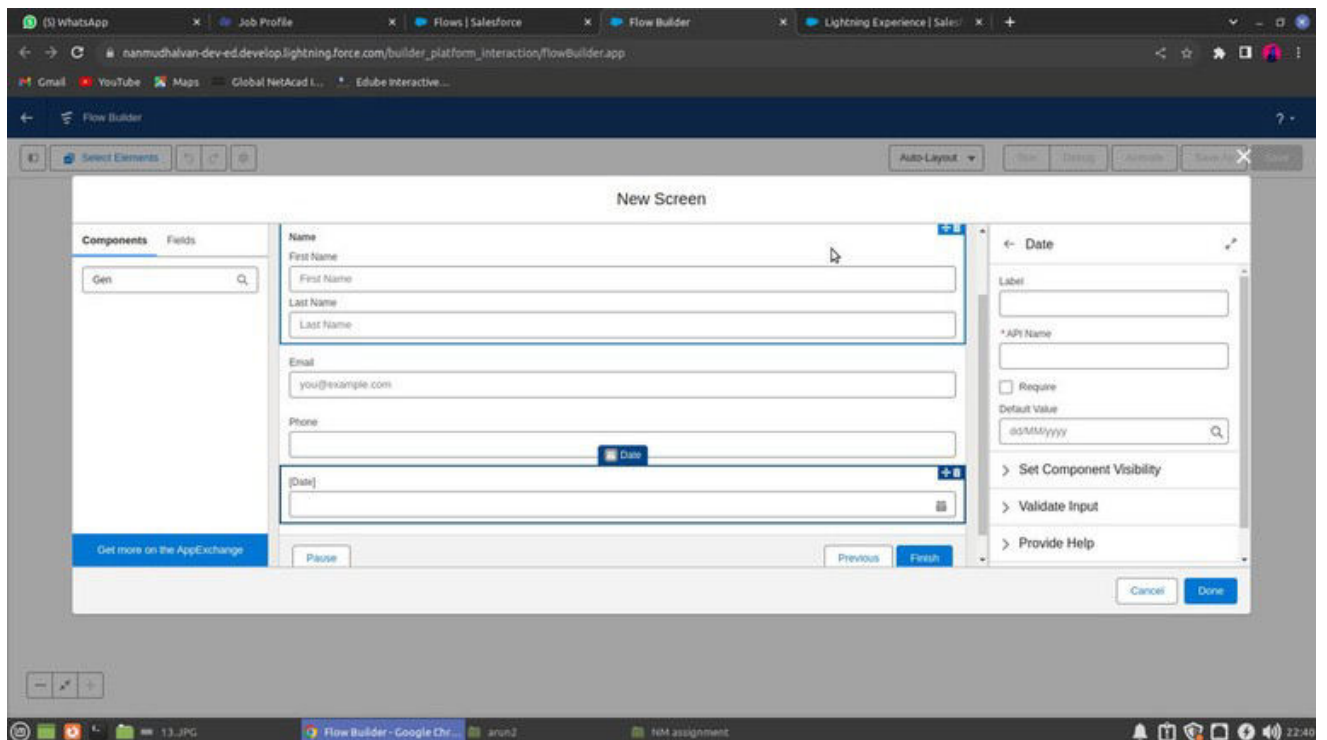
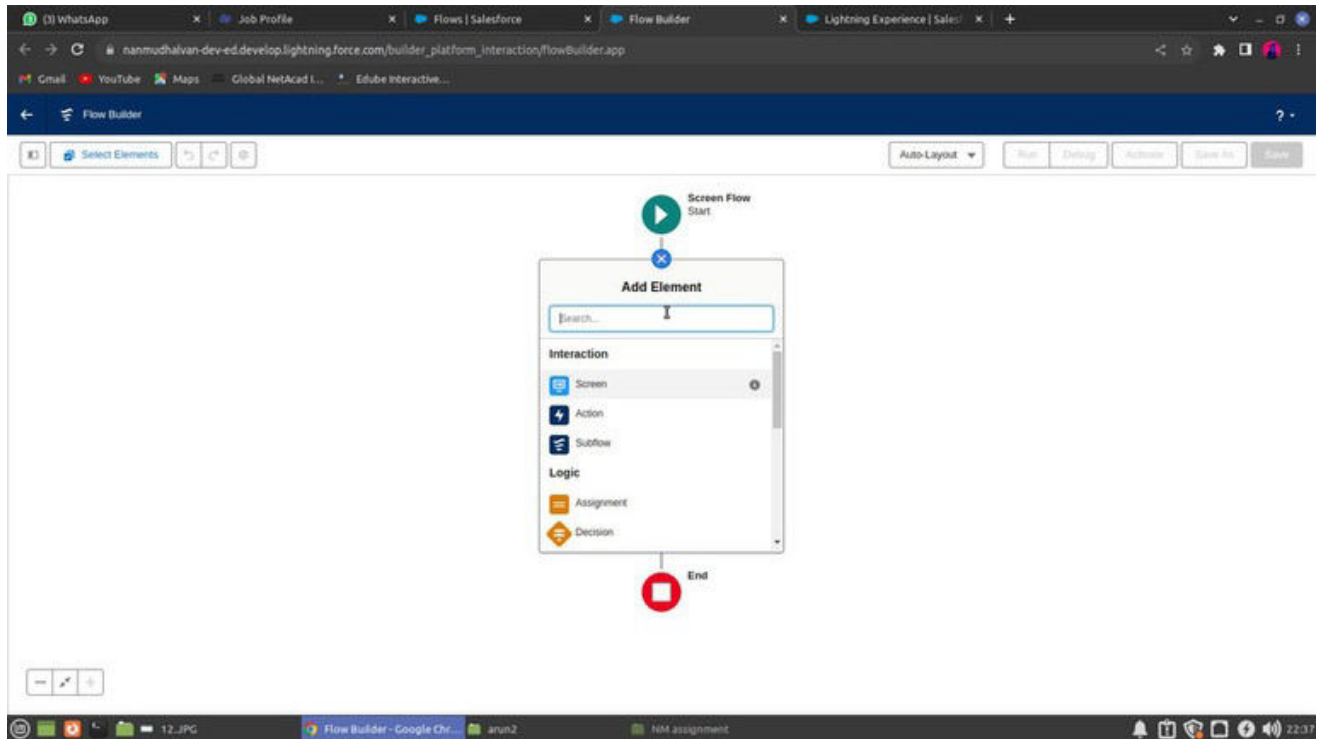
Schedule-Triggered Flow
Launches at a specified time and frequency for each record in a batch. This autolaunched flow runs in the background.

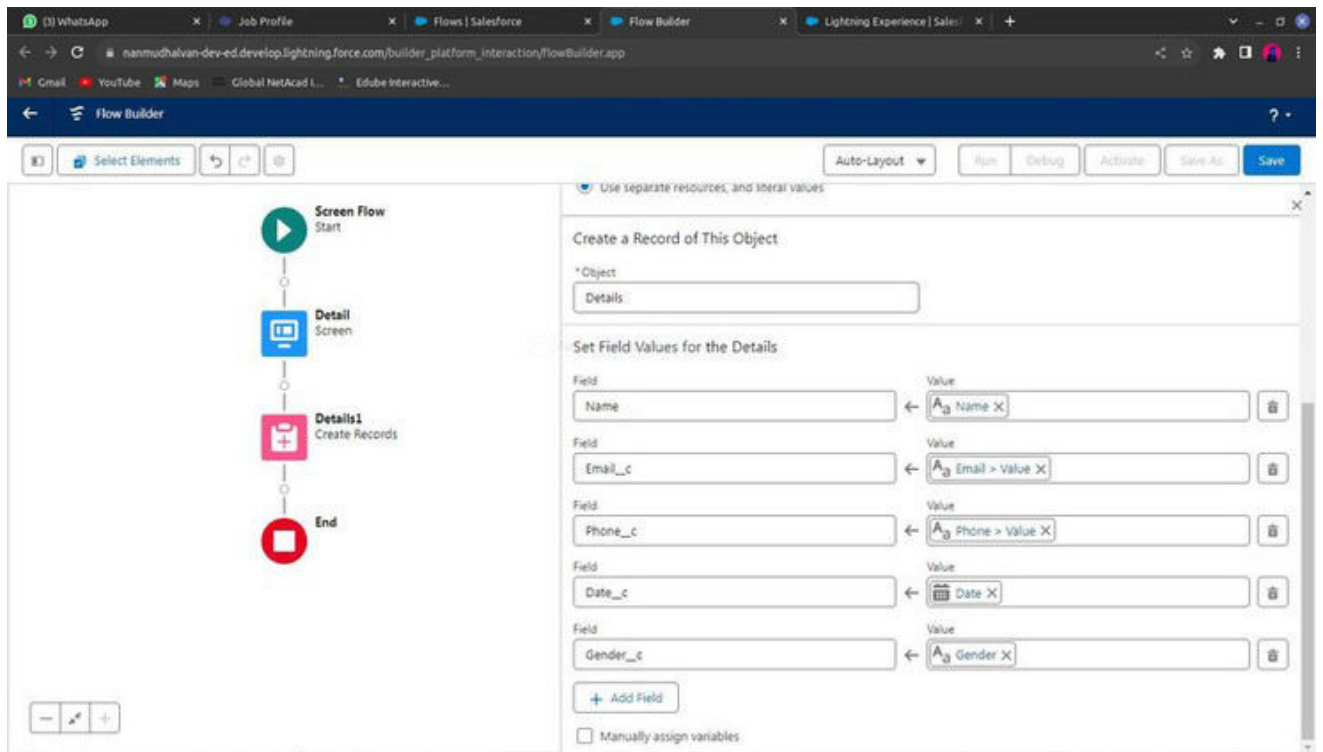
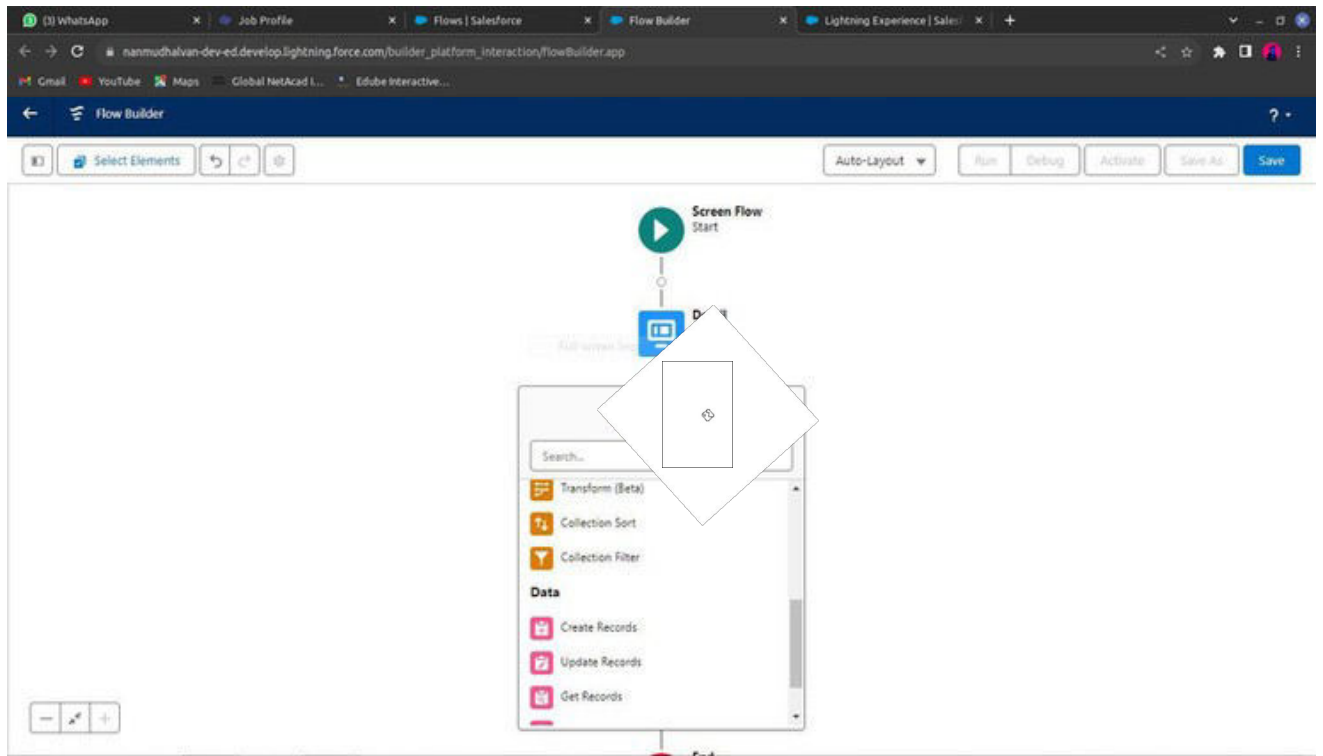
Platform Event--Triggered Flow
Launches when a platform event message is received. This autolaunched flow runs in the background.

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

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

Create





(3) WhatsAppJob ProfileFlows | SalesforceFlow BuilderLightning Experience | Sales

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

GmailYouTubeMapsGlobal NetAcad L...Edube Interactive...

Details12

NameKAajmviayla

EKaviya@gmail.com

P

D

G

Female

Next

(3) WhatsAppJob ProfileFlows | SalesforceFlow BuilderLightning Experience | Sales

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

GmailYouTubeMapsGlobal NetAcad L...Edube Interactive...

Search...

My-appCollegeDepartmentDetails

DetailsKaviya

New ContactEditNew Opportunity

RelatedDetails

Details NameKaviya

Kaviya@gmail.com

Female

Kaviya

OwnerKaviya

Last Modified ByKaviya · 18/10/2023, 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.

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

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

Navigation: Setup, Home, Object Manager

SETUP New Custom Object

New Custom Object

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

Custom Object Definition Edit

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 news feeds, 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.

Taskbar: 1.JPG, New Custom Object | Sales..., arun3, NM assignment, 22:43

Browser tabs: (S) WhatsApp, Job Profile, Tabs | Salesforce, Lightning Experience | Sales...

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

Navigation: Setup, Home, Object Manager

Search: tabs

User Interface

Rename Tabs and Labels

Tabs

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

SETUP Tabs

New Custom Object Tab

Help for this Page

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 page](#).

Object Management

Tab Style Canvas

(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

Taskbar: Tabs | Salesforce - Google..., 2.JPG, arun3, NM assignment, 22:44

Screenshot of the Salesforce Setup interface showing the 'Tabs' configuration page. The browser tabs include WhatsApp, Job Profile, Tabs | Salesforce, and Lightning Experience | Sales. The URL is nanudhalvan-dev-ed.develop.lightning.force.com/lightning/setup/CustomTab/page?address=%2Fsetup%2Fui%2FcustomTab.jsp%3FsetupId%3DCustomTab%26retURL%3D%252Fsetup%252F... The left sidebar shows the 'Setup' menu with 'User Interface' expanded and 'Rename Tabs and Labels' selected. The main content area is titled 'SETUP Tabs' and contains a table of 'Custom Object Tabs' and a section for 'Web Tabs'.

Action	Label	Tab Style	Description
Edit Del	Colleges	Building Block	
Edit Del	Departments	Credit Card	
Edit Del	Details	Lightning	
Edit Del	Enquiries	Dashboard	
Edit Del	Expense products	Lightning	
Edit Del	Inventories	CD/DVD	
Edit Del	Macademics	Calendar	
Edit Del	our customers	Books	
Edit Del	Properties	Assess	
Edit Del	retails	Highway Sign	
Edit Del	Service products	File	
Edit Del	Students	Envelope	

Web Tabs

No Web Tabs have been defined

Screenshot of the Salesforce Flow Builder interface. The browser tabs include WhatsApp, Job Profile, Flows | Salesforce, Flow Builder, and Lightning Experience | Sales. The URL is nanudhalvan-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.app. The left sidebar shows the 'My-app' menu with 'Recently Viewed' selected. The main content area is titled 'Management' and shows a list of items with a 'Management Name' column. A message at the bottom states: 'You haven't viewed any Management recently. Try switching list views.'

Management

Recently Viewed

0 items • Updated a few seconds ago

☐ Management Name

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

Setup

Profiles

Profiles

Profiles

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

Page 1 of 1

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
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

Setup

Search Setup

Hyperforce Assistant

Users

Profiles

Data

Mass Transfer Approval Requests

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Data.com

Prospector Preferences

Prospector Users

Functions

Marketing

Lead Processes

Sales

Products

Asset Settings

SETUP Profiles

Contact Point Consents

Contact Point Emails

Streaming Channels

User External Credentials

Custom Object Permissions

	Object Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
College	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Department	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Details

Management

Session Settings

Session Times Out After: 2 hours of inactivity

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

Password Policies

User passwords expire in: 90 days

Enforce password history: 3 passwords remembered

Minimum password length: 8

Setup

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Hyperforce Assistant

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

Profile Detail

Name: Manager

User License: Salesforce Platform

Description:

Created By: Admin | 18/10/2023, 3:47 pm

Modified By: Admin | 18/10/2023, 3:48 pm

Custom Profile: ☒

Page Layouts

Standard Object Layouts	Object Milestone	Operating Hours	Order
Global: Global Layout [View Assignment]	Object Milestone Layout: Object Milestone Layout [View Assignment]	Operating Hours Layout: Operating Hours Layout [View Assignment]	Order Layout: 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: nanmudhalvan-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.app

Page header: Search Setup

Left sidebar: Setup, Home, Object Manager. Search: user. Users: Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, Users (selected), Feature Settings, Data.com, Service, Embedded Service.

New User

Sub-screen link: Add screen link

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

Page header: Search Setup

Left sidebar: Setup, Home, Object Manager. Search: user. Users: Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, Users (selected), Feature Settings, Data.com, Service, Embedded Service.

New User

Sub-screen link: Add screen link

Help for this Page

User Edit: Save, Save & New, Cancel

General Information

First Name: manager
Last Name: 2
Alias: m2
Email: managerxyz@gmail.com
Username: managerxyz@gmail.com
Nickname: User1697624453758508865
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](#)

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

New

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

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Setup Home Object Manager

per

Hyperforce Assistant

Lightning Experience Transition Assistant

Users

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Functions

Sales

Accounts

Person Accounts

Salesforce Scheduler

Assignment Policies

Salesforce Scheduler

SETUP Permission Sets

Permission Set manager12

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

Permission Set Overview

Property	Value
Description	
License	
Session Activation Required	<input type="checkbox"/>
Permission Set Groups Added To	0
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

Setup Home Object Manager

per

Hyperforce Assistant
Lightning Experience Transition Assistant

Users

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Permission Sets

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Settings

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Sales

Accounts

Person Accounts

Salesforce Scheduler

Assignment Policies

Salesforce Scheduler

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

Setup Home Object Manager

per

Hyperforce Assistant
Lightning Experience Transition Assistant

Users

Permission Set Groups

Permission Sets

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Digital Experiences

Settings

Functions

Sales

Accounts

Person Accounts

Salesforce Scheduler

Assignment Policies

Salesforce Scheduler

Select Users to Assign

All Users

1 item selected

Search this list...

	Full Name	Username	Role	A...	Profile
<input type="checkbox"/>	Kaviya	anunj@123@gmail.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>		chatty00d5j00000dq4hgeat3yy9pn6v4mm@chatters...		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	consumer 1	cl1 cons143@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	consumer
<input type="checkbox"/>	Integration User	integ integration@00d5j00000dq4hgeat3yy9pn6v4mm@chatters...		<input checked="" type="checkbox"/>	Analytics Cloud Integration Us...
<input checked="" type="checkbox"/>	manager 1	m1 managersabcabc@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Manager

Cancel Next

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

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

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 SET "MANAGER12"

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.

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. [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 name layouts, list views, related lists, and search results. For example, the Record Name for Account is "Browser 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/CustomTab/page?address=%2Fsetup%2Fui%2FobjectCustomTabWizard.jsp%3FretURL%3D%252F011SH0000000jo7D%252Fset...

Setup Home Object Manager

SETUP Tabs

New Custom Object Tab

Step 1. Enter the Details Step 1 of 3

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

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

Object

Tab Style [Create](#)

(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/0115h000000j07D/Details/view

Search Setup

Setup Home 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

Edit Delete

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

https://nanmudhalvan-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115h000000j07D/Details/view

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

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

Search Setup

Setup Home Object Manager

New Custom Object

Help for this Page

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

Custom Object Definition Edit

Save Save & New Cancel

Custom Object Information

Required Information

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

Label Example: Account

Plural Label Example: Accounts

Starts with vowel sound ☐

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

Object Name Example: Account

Description

Context-Sensitive Help Setting

☒ Open the standard Salesforce.com Help & Training window

☐ Open a window using a Visualforce page

Content Name

Enter Record Name Label and Format

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

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

Address bar: 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](#)

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

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.

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](#)

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

Customer

New Relationship

Help for this Page

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

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

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 \(0\)](#) |
 [Enabled Apex Class Access \(0\)](#) |
 [Enabled Visualforce Page Access \(0\)](#) |
 [Enabled External Data Source Access \(0\)](#) |
 [Enabled Named Credential Access \(0\)](#) |
 [Enabled External Credential Provider Access \(0\)](#) |
 [Enabled Custom Metadata Type Access \(0\)](#) |
 [Enabled Custom Settings Definitions Access \(0\)](#) |
 [Enabled Flow Access \(0\)](#) |
 [Enabled Service Resource Status Access \(0\)](#) |
 [Enabled Custom Permissions \(0\)](#)

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

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

Page Layouts

Standard Object Layouts	Global	Object Milestone
Email Application	Global Layout View Assignment	Object Milestone Layout View Assignment
Home Page Layout	Not Assigned View Assignment	Operating Hours Layout View Assignment
	Home Page Default View Assignment	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](#)

Setup | Home | Object Manager

Search Setup

Hyperforce Assistant

Users

Profiles

Data

Mass Transfer Approval Requests

Feature Settings

Data.com

Prospector Preferences

Prospector Users

Functions

Marketing

Lead Processes

Sales

Products

Asset Settings

SETUP Profiles

Profile Edit Management

Set the permissions and page layouts for this profile.

Profile Edit

Name: Management

User License: Salesforce Platform

Description:

Custom Profile: ☒

Save Save & New Cancel

Custom App Settings

Visible Default

App	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

Setup | Home | Object Manager

Search Setup

Hyperforce Assistant

Users

Profiles

Data

Mass Transfer Approval Requests

Feature Settings

Data.com

Prospector Preferences

Prospector Users

Functions

Marketing

Lead Processes

Sales

Products

Asset Settings

SETUP Profiles

Custom Object Permissions

	Object 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"/>

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

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

Full-screen help Help for this Page

User Edit Save Save & New Cancel

General Information

First Name: manager

Last Name: bank

Alias: mbank

Email: managerbank@gmail.com

Username: managerbank@gmail.com

Nickname: User1697625040398307733

Title:

Company:

Department:

Division:

Role: <None Specified>

User License: Partner App Subscription

Profile: Partner App Subscription User

Active: ☒

Marketing User: ☐

Offline User: ☐

Knowledge User: ☐

Flow User: ☐

Service Cloud User: ☐

Site.com Contributor User: ☐

Site.com Publisher User: ☐

WDC User: ☐

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

Search: prof

Profiles

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

SETUP Profiles

Sales Manager

Full-screen help Help for this Page

Profile Edit Save Save & New Cancel

Name: Sales Manager

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"/>

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

Service Provider Access

Setup

Search Setup

Users

Profiles

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

SETUP Profiles

Contact Point Addresses ☐ ☐ ☐ ☐ ☐ ☐

Contact Point Consents ☒ ☒ ☒ ☒ ☐ ☐

Contact Point Emails ☒ ☒ ☒ ☒ ☐ ☐

Setters ☒ ☒ ☒ ☒ ☐ ☐

Streaming Channels ☒ ☒ ☒ ☒ ☐ ☐

User External Credentials ☐ ☐ ☐ ☐ ☐ ☐

Custom Object Permissions

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Blank	<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:

Setup

Search Setup

Users

Profiles

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

SETUP Users

New User

Full screen help

Help for this Page

User Edit

General Information

First Name:

Last Name:

Alias:

Email:

Username:

Nickname:

Title:

Company:

Department:

Division:

Role:

User License:

Profile:

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

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"/>	Buylt	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"/>	CMD High Scale Flow Integration User	Allows integration user to access features specific to CS...	Cloud Integration User
<input type="checkbox"/>	CRM User	Denotes that the user is a Sales Cloud or Service Cloud u...	CRM User
<input type="checkbox"/>	Commerce Admin	Allow access to commerce admin features.	Commerce Admin Permission Set License Seats
<input type="checkbox"/>	Contact Center Admin	Manage Service Cloud Voice contact centers that use Am...	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Agent	Access agent features in Service Cloud Voice contact cent...	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Supervisor	Access supervisor features in Service Cloud Voice contact...	Service Cloud Voice User
<input type="checkbox"/>	Experience Profile Manager		Salesforce
<input type="checkbox"/>	Facility Manager	Lets users create, read, edit, and delete locations, subloa...	Facility Manager

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

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 Set 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	donj 15/10/2023, 4:06 pm
Permission Set Groups Added To	Last Modified By	donj 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

Setup

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Salesforce Scheduler

Assignment Policies

Salesforce Scheduler

SETUP

Permission Sets

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

Setup

Search Setup

Hyperforce Assistant

Lightning Experience Transition Assistant

Users

Permission Set Groups

Permission Sets

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All Users

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<input type="checkbox"/>	Chatter Expert	chatter00d5j00000d04hgeat13yy9pn6v4mm@c...		Chatter Free User
<input type="checkbox"/>	consumer 1	c1 cons143@gmail.com	Marketing Team	consumer
<input type="checkbox"/>	Integration User	integ integration@00d5j00000d04hgeat...		Analytics Cloud Integration User
<input type="checkbox"/>	manager 1	m1 managerabcabc@gmail.com	Marketing Team	Manager
<input type="checkbox"/>	manager 2	m2 managerxyzxyz@gmail.com	Marketing Team	Solution Manager
<input checked="" type="checkbox"/>	manager bank	mbank managerbank123@gmail.com	Marketing Team	Salesforce API Only System Integratio...

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


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