

Naan Mudhalvan Salesforce Developer (Course) Assignment

Name: Swathi.K

Naan Mudhalvan id: EBD671D26E9E5EAA08A488B18952DDAB

Year and Dept: 4th year and CSE

Batch: 2024

Zone.no: Zone 8

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

WhatsApp | New Custom Object | Sales | +

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

Record Name Example: Account Name

WhatsApp | New Custom Object | Sales | +

nanudhalvan-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 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

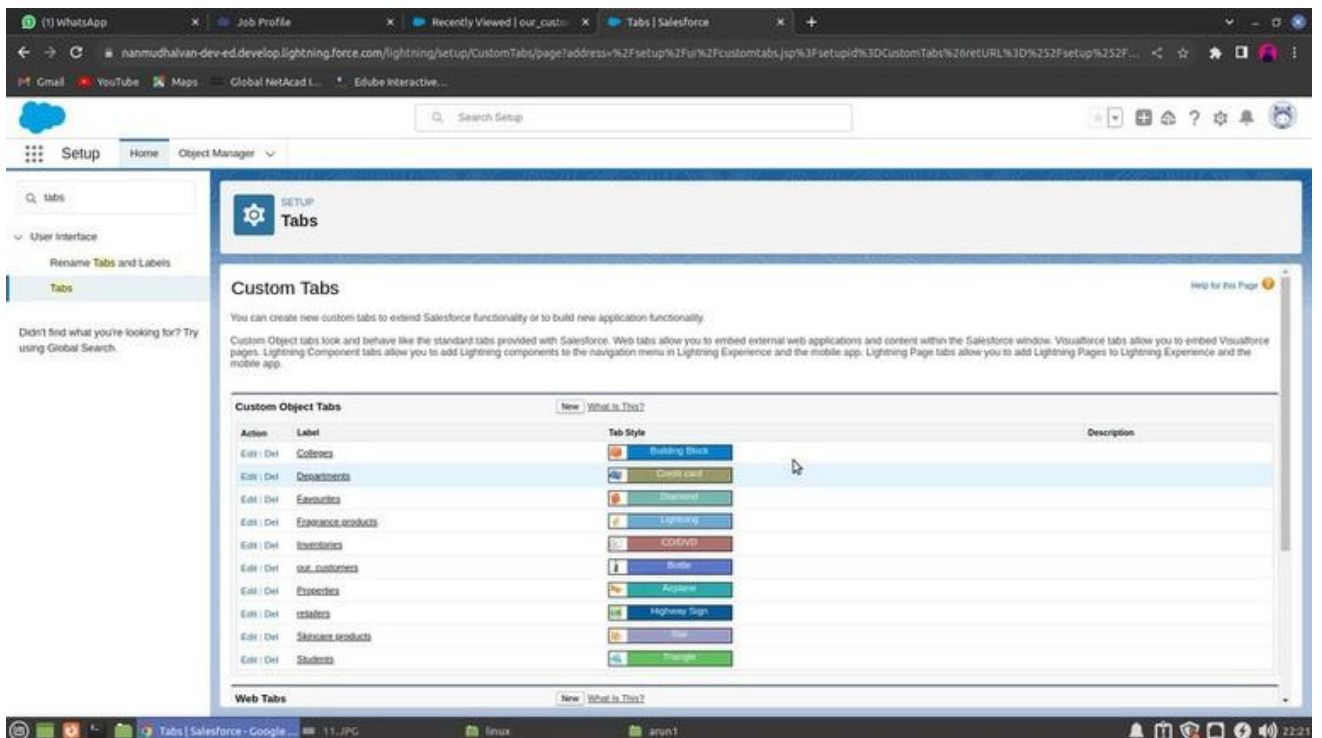
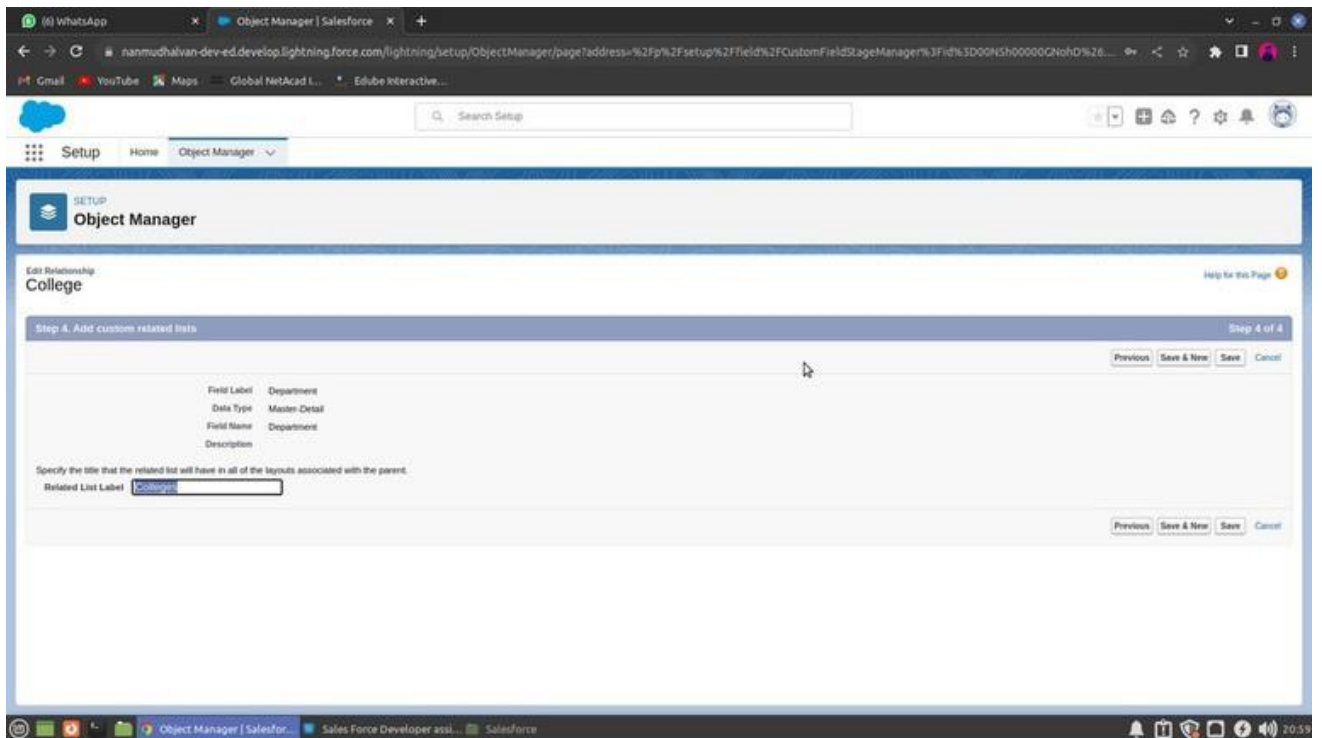
Context Sensitive Help Setting ☒ Open the standard Salesforce.com Help & Training window ☐ Open a window using a Visualforce page

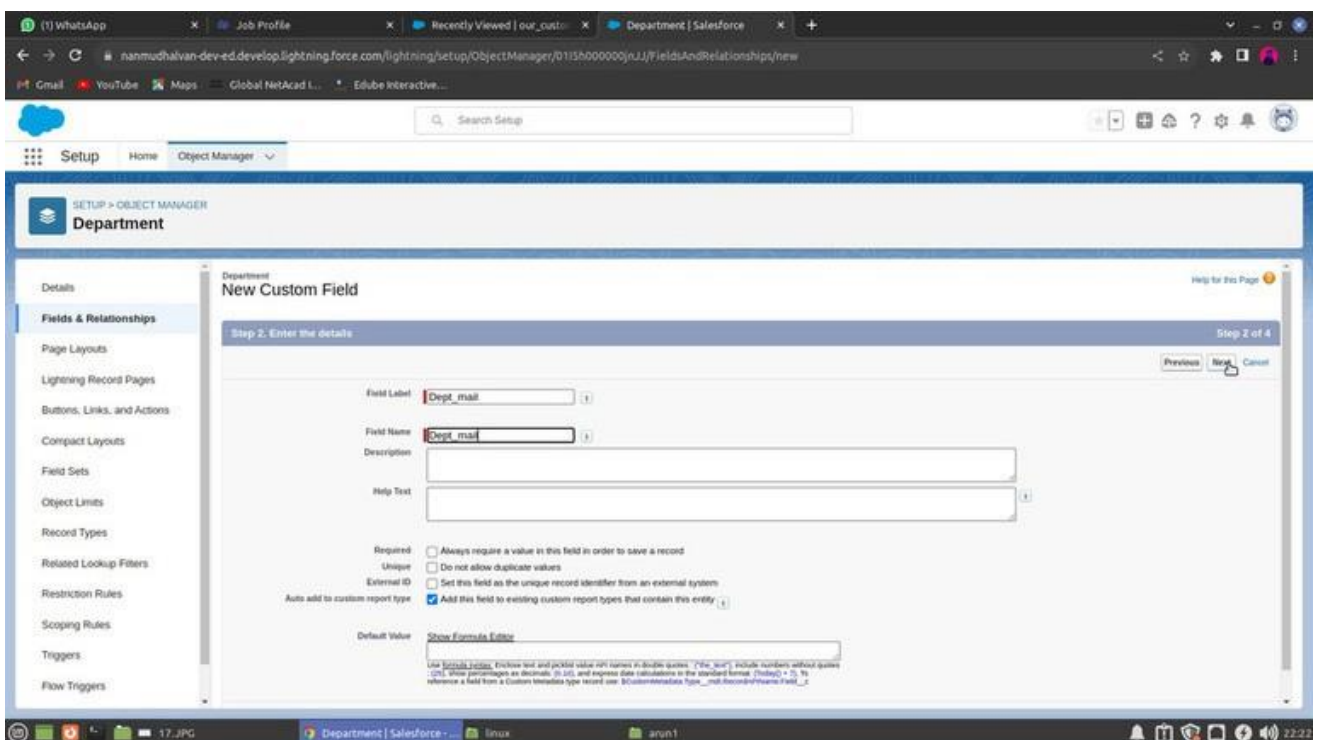
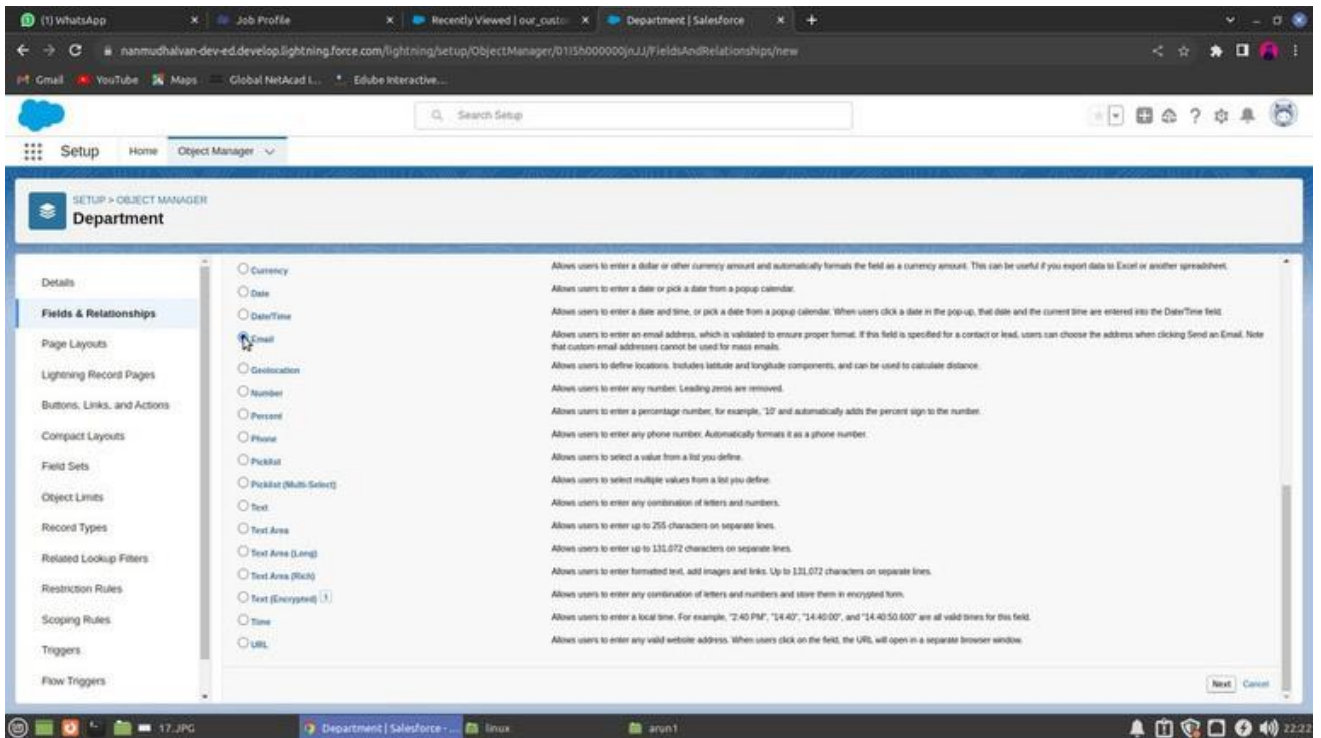
Content Name

Enter Record Name Label and Format

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

Record Name Example: Account Name





Setup > OBJECT MANAGER
Department

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

- ☐ Currency
- ☐ 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
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 formulas, merge fields, text, and picklist values. Names in double quotes ("like, text") include numbers without quotes. Picklist values are case-sensitive. To reference a field from a Custom Metadata type record, use: \$CustomMetadata.Type__c__RecordName.Field__c

Previous Next Cancel

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. 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 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

Data Type

Select one of the data types below.

- ☐ None Selected
- ☐ Auto Number

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

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

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

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

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

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

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

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

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

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

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

Setup Search Setup

Setup Home Object Manager

College

Details

Fields & Relationships

5 Items, Sorted by Field Label

Quick Find

New Deleted Fields Field Dependencies Set History Tracking

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

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Setup Search Setup

Setup Home Object Manager

Lightning Experience App Manager

New Lightning App New Connected App

22 Items • Sorted by App Name • Filtered by All app:nutems - 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	✓

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

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

Search Setup

Apps

User Interface

App

Didn't find what you were looking for?

New Lightning App

App Details & Branding

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

App Details

*App Name ⁱ
Name your app...

*Developer Name ⁱ
Enter a developer name...

Description ⁱ
Enter a description...

App Branding

Image ⁱ

Upload

Primary Color Hex Value ⁱ

#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?

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 ⁱ
My_College

*Developer Name ⁱ
My_College

Description ⁱ
Enter a description...

App Branding

Image ⁱ

Upload

Primary Color Hex Value ⁱ

#0070D2

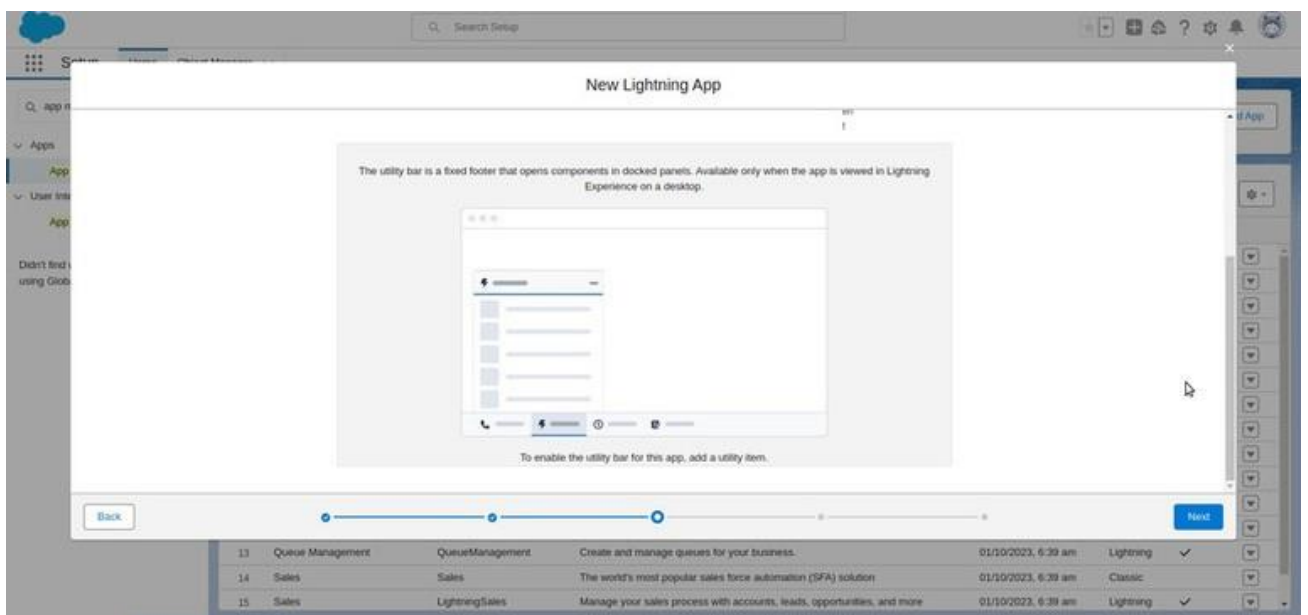
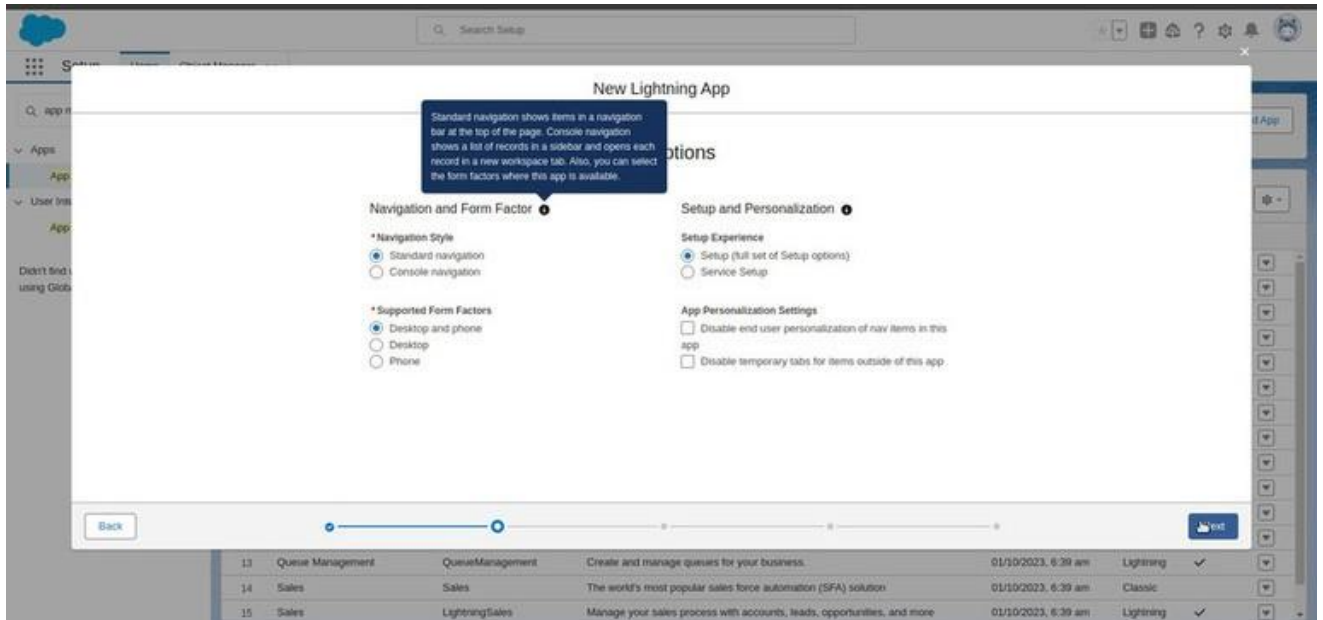
Org Theme Options

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

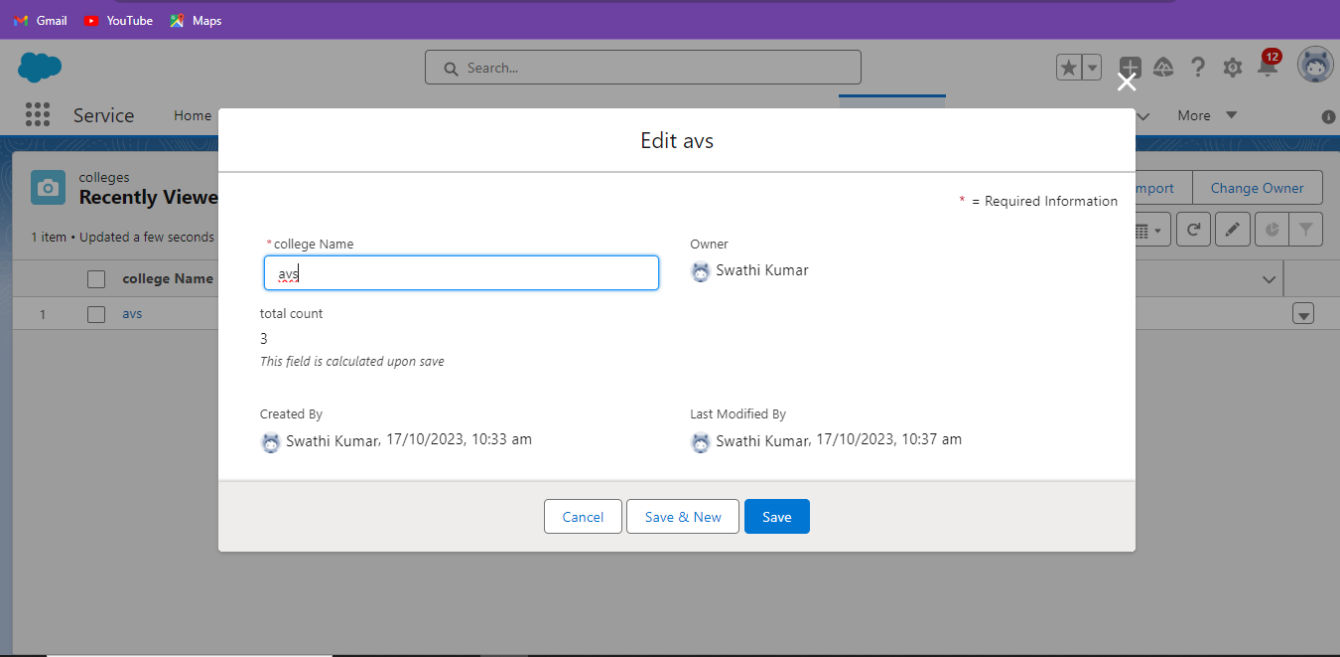
App Launcher Preview


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	✓









The screenshot shows the Salesforce Lightning App Builder interface. A 'New Lightning App' window is open, displaying a search bar with the text 'sy'. Below the search bar, there is a list of 'Salesforce API Only System Integrations'. To the right, a 'System Administrator' role is selected. The interface includes a sidebar with navigation options such as 'App', 'Data', 'Mass', 'Resp', 'Apps', 'App', 'App', 'Con', 'U', 'M', 'Ede', 'S', 'Ligh', 'R', 'U', 'Mob', and a bottom table with columns for ID, Name, Description, and Date.





Search...



ServiceHomeChatterAccountsContactsCasesReportsDashboardscollegesdepartmentsBankMore

college
avs

New ContactEditNew Opportunity

Related

Details

college Name
avs


Owner
Swathi Kumar

total count
3







Created By
Swathi Kumar, 17/10/2023, 10:33 am

Last Modified By
Swathi Kumar, 17/10/2023, 10:37 am

GmailYouTubeMaps



Search...



ServiceHomeChatterAccountsContactsCasesReportsDashboardscollegesdepartmentsBankMore

departments
Recently Viewed

3 items • Updated a few seconds ago

☐ depart Name

☐ CSE

☐ MECH

☐ EEE

Edit EEE

* = Required Information

* depart Name
EEE

college
avs


Created By
Swathi Kumar, 17/10/2023, 10:35 am


Last Modified By
Swathi Kumar, 17/10/2023, 10:35 am

Cancel

Save & New

Save

 college
avs

[New Contact](#) [Edit](#) [New Opportunity](#) 

Related

Details


college Name

avs


total count

3


Created By

 Swathi Kumar, 17/10/2023, 10:33 am

Owner

 Swathi Kumar

Last Modified By

 Swathi Kumar, 17/10/2023, 10:37 am

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, Details | Salesforce, Lightning Experience | Sales | +

Address bar: nanmudhalvan-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0113h000000j0sJ/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
Details

Details

Fields & Relationships
4 items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

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

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

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

Address bar: nanmudhalvan-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0113h000000j0sJ/FieldsAndRelationships/new

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
Details

Details

Fields & Relationships

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

Relationships

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

☐ Picklist (Multi-Select)
Allows users to select multiple values from a list you define.

☐ Text
Allows users to enter any combination of letters and numbers.

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

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

New Custom Field

Step 2: Enter the details Step 2 of 4

Field Label: Enter a label to be used on displays, page layouts, reports, and list views.

Field Name:

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: Use formula syntax. Enclose text and partial value not names in double quotes. ("file_name") include numbers without quotes. (%), show percentages as decimals, (c, j), and express date calculations in the standard format: (today) + 10. To reference a field from a Custom Metadata type record use: \$CustomMetadataType__md.RecordName.Field__c

Previous Next Cancel

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

New Custom Field

Step 4: Add to page layouts Step 4 of 4

Field Label: Mail

Data Type: Email

Field Name: Mail

Description:

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

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

☒ Add Field ☐ Page Layout Name

☒ Details Layout

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

Previous Save & New Save Cancel

Setup > OBJECT MANAGER

Details

Details

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 export data to Excel or another spreadsheet.

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

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

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

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

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

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

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

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

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

Allows users to enter any combination of letters and numbers.

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

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

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

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

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

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

Next Cancel

Setup > OBJECT MANAGER

Details

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

New Custom Field

Help for this Page

Step 2 of 4

Step 2. Enter the details

Field Label: Phone

Field Name: phone

Description:

Help Text:

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

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

Default Value: Show Formula Editor

Use formula syntax. Enclose text and picklist value names in double quotes ("file_text"). Include numbers without quotes. Use percent signs as decimals (0.33), and express date calculations in the standard format: "Today" + 9. To reference a field from a Custom Metadata type record use: \$CustomMetadata.Type__mdf.RecordInstance.Field__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

Setup > OBJECT MANAGER
Details

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

☐ Currency
☒ Date
☐ DateTime
☐ Email
☐ Geolocation
☐ Number
☐ 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", and "14:40:00" 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.

Save Cancel

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

Setup Home Object Manager

Details

Details

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 quoted value API names in double quotes (""). Use numbers without quotes. Use formulas to calculate values. Use the standard format: {Field} + 1. To reference a field from a custom metadata type record use: {CustomMetadataType__c}. To reference a field from a custom metadata type record use: {CustomMetadataType__c}. To reference a field from a custom metadata type record use: {CustomMetadataType__c}.

Previous Next Cancel

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

Setup Home Object Manager

Details

Details

New Custom Field

Step 4: Add to page layouts

Field Label: Date

Field 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

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

Address bar: nanmudhalvan-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115h000000j0s5/FieldsAndRelationships/new

Search Setup

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

- ☐ Checkbox
- ☐ 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" are all valid times for this field.

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

Next Cancel

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

Address bar: nanmudhalvan-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115h000000j0s5/FieldsAndRelationships/new

Search Setup

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: 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:

Previous Next 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

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

New Custom Field

Step 4. Add to page layouts

Previous Save & New **New** Cancel

Field Label	Gender
Data Type	Picklist
Field Name	Gender
Description	

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

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

☒ Add Field ☐ Page Layout Name

☒ Details Layout

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

Previous Save & New **Save** Cancel

Setup > OBJECT MANAGER

Details

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

8 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Date	Date__c	Date		
Details Name	Name	Text(80)		✓
Gender	Gender__c	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Mail	Mail__c	Email		
Owner	OwnerId	Lookup(User,Group)		✓
Phone	Phone__c	Phone		

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

Setup Home Object Manager

Search Setup

Setup Tabs

New Custom Object Tab

Step 1. Enter the Details

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

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

Object Details

Tab Style Lightning

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

Splash Page Custom Link --None--

Enter a short description.

Description

Next Cancel

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

Setup Home Object Manager

Search Setup

Setup Tabs

Custom Tabs

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

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

Custom Object Tabs

New What Is This?

Action	Label	Tab Style	Description
Edit Del	Collores	Building Block	
Edit Del	Decorations	Credit card	
Edit Del	Details	Lightning	
Edit Del	Facilities	Document	
Edit Del	Expenditure products	Lightning	
Edit Del	Inventory	CONFID	
Edit Del	out_customers	Book	
Edit Del	Properties	Anytime	
Edit Del	relationships	Highway Sign	
Edit Del	Skincare products	Star	
Edit Del	Students	Triangle	

Setup

Search Setup

Flow Trigger Explorer New Flow

Flow Definitions

All Flows

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

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

Flow Builder

New Flow

Core All + Templates

Screen Flow

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

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.

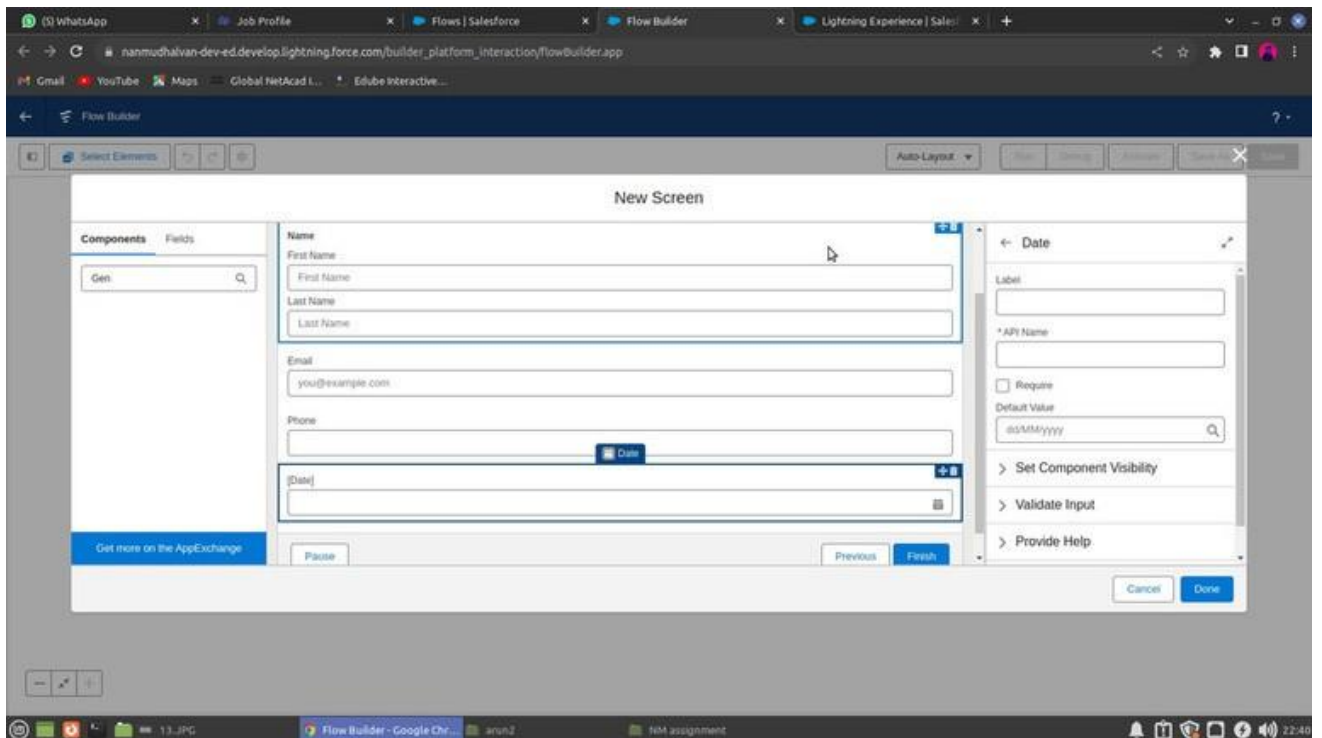
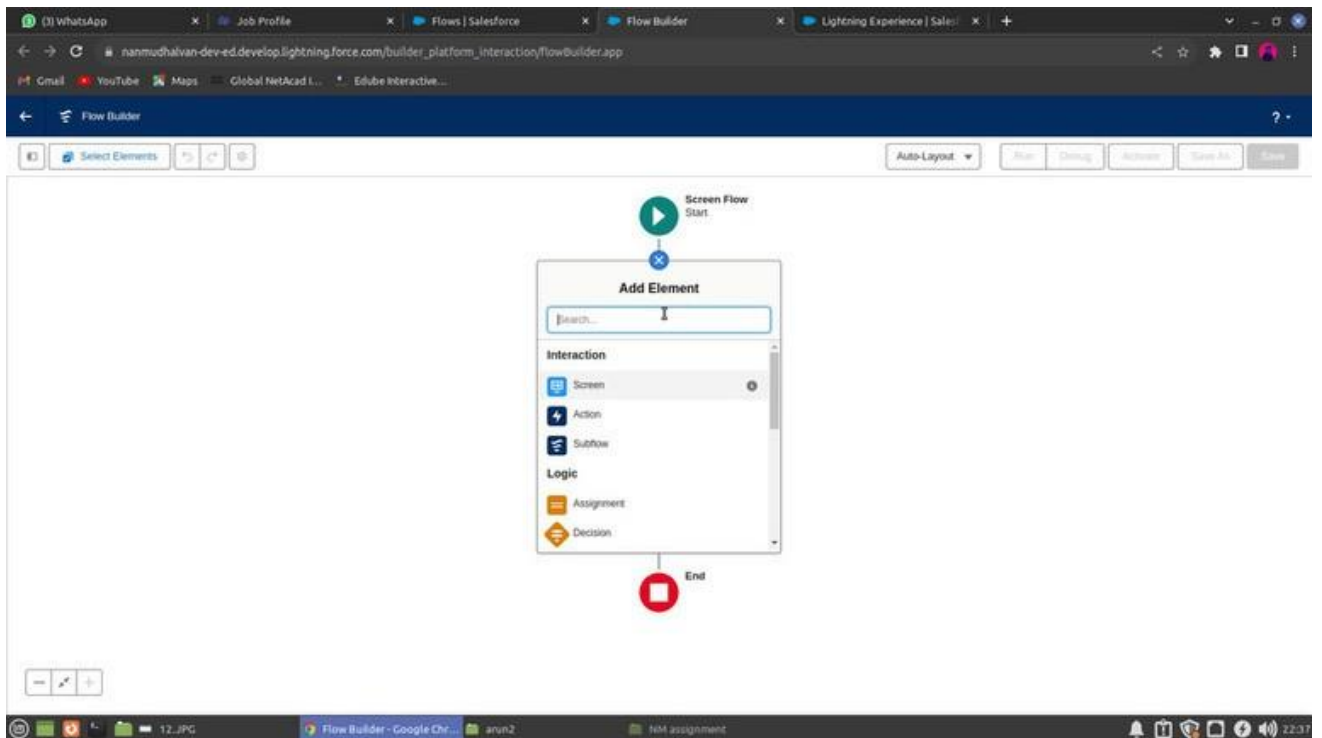
Autolaunched Flow (No Trigger)

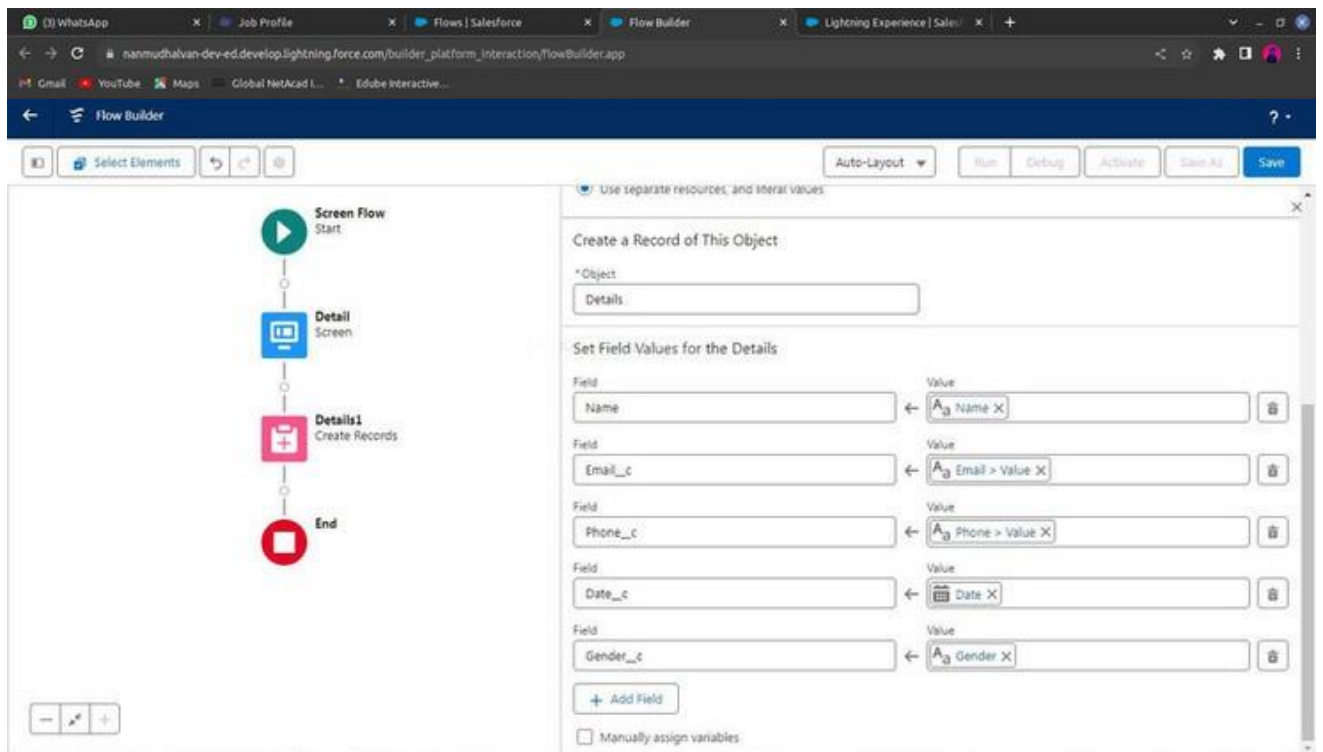
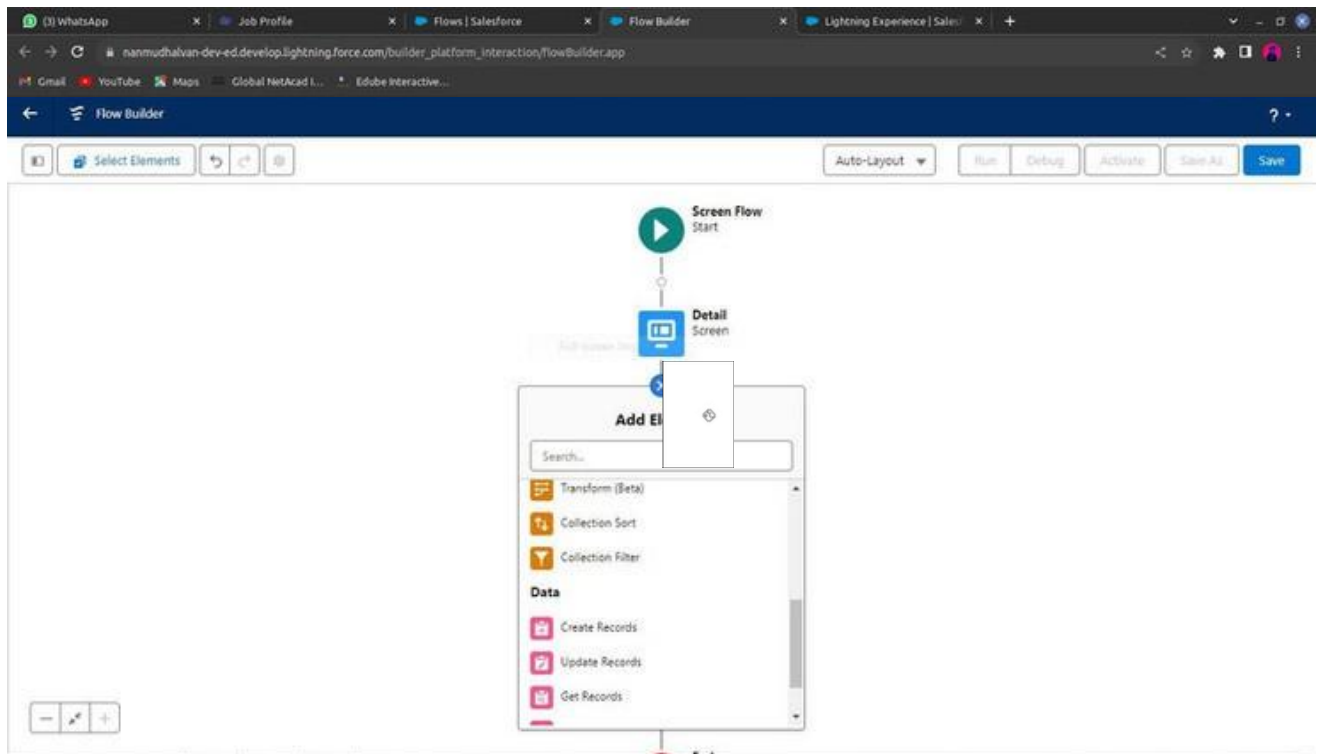
Launches when invoked by Apex, processes, REST API, and more. This autolaunched flow runs in the background.

Record-Triggered Orchestration

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

Create






Related	Details
Details Name	
kumar	
Email	
abs@cd.com	
Phone	
1232567818	
Date	
18/10/2023	
Gender	
Male	
Created By	
Swathi Kumar, 17/10/2023, 12:27 pm	

← → ↺

avsengineeringcollege88-dev-ed.develop.lightning.force.com/lightning/r/Details_c/a055h00001aH5mwAAC/view

🔍 📄 ⭐ ⚙️ ⬇️ 🗑️ 🧑

Gmail YouTube Maps




🔍 Search...

★ + 🔔 ? ⚙️ 🔔 12 🧑

⋮ Service

Home Chatter Accounts ▾ Contacts ▾ Cases ▾ Reports ▾ Dashboards ▾ colleges ▾ departments ▾ Details ▾ + More ▾ ⓘ

 Details

kumar

New Contact Edit New Opportunity ▾

Related

Details

Details Name

kumar

Email

abs@cd.com

Phone

1232567818

Date

18/10/2023

Gender

Male

Created By

Swathi Kumar, 17/10/2023, 12:27 pm

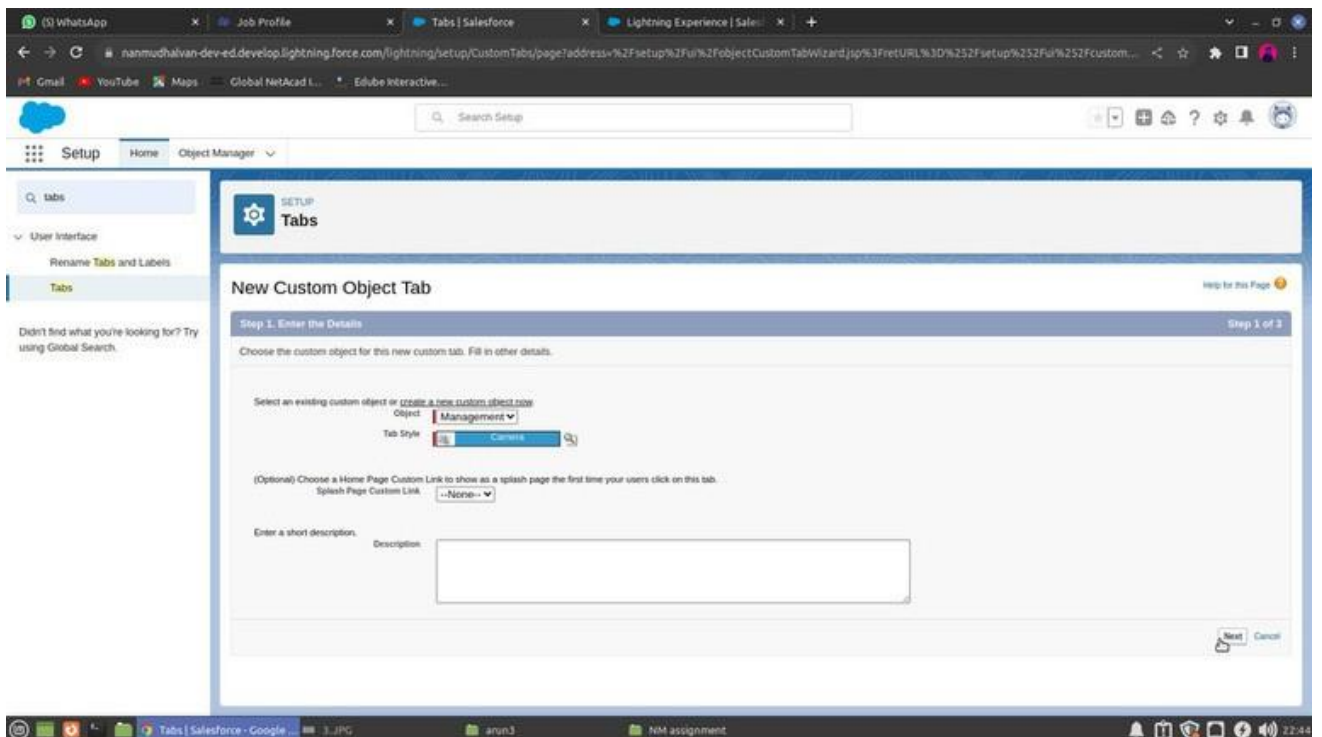
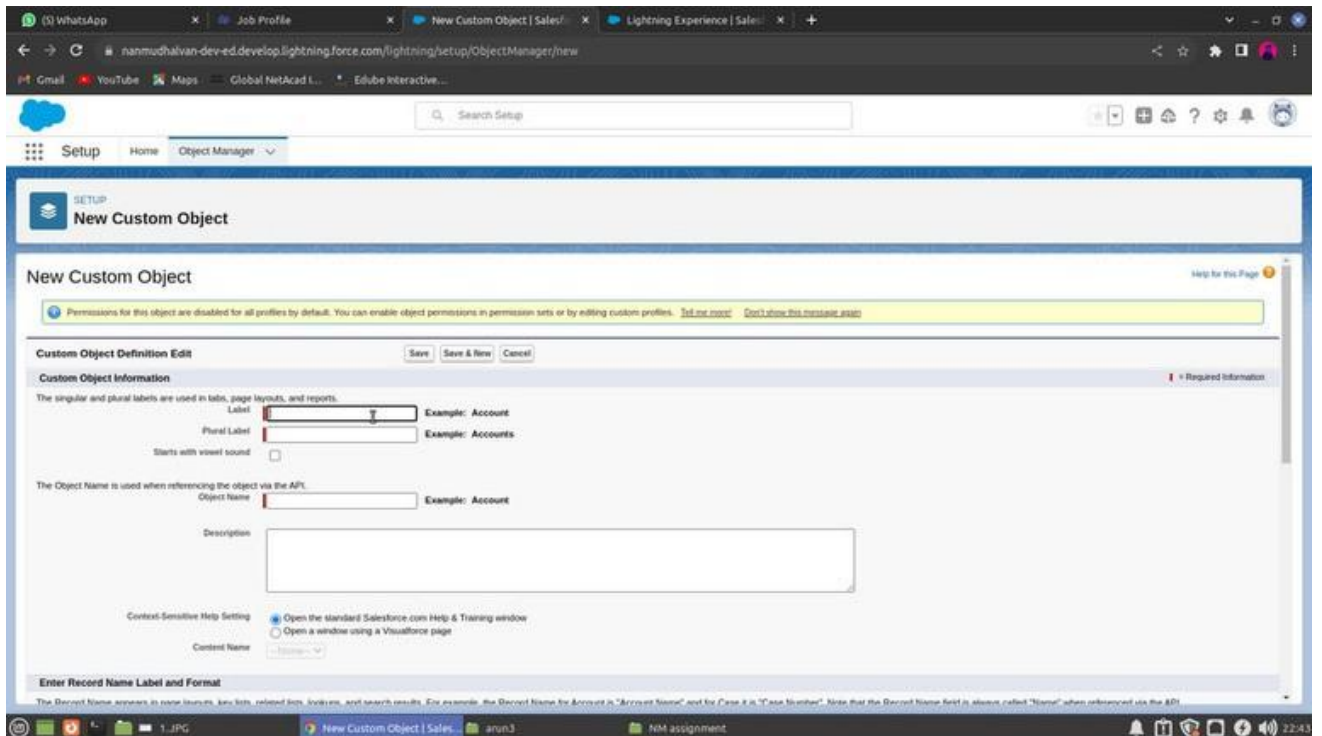
Owner

Swathi Kumar

Last Modified By

Swathi Kumar, 29/10/2023, 4:02 pm

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



Setup | Home | Object Manager

Search Setup

Setup Tabs

Custom Object Tabs

Action	Label	Tab Style	Description
Edit Del	Collores	Bulking Block	
Edit Del	Departments	Credit card	
Edit Del	Details	Lightning	
Edit Del	Enactures	Shannon	
Edit Del	Expanance products	Lightning	
Edit Del	Inventories	COOVD	
Edit Del	Managements	Camera	
Edit Del	our customers	Boile	
Edit Del	Procedures	Anytime	
Edit Del	relaters	Highway sign	
Edit Del	Skincare products	Real	
Edit Del	Students	Tranpage	

Web Tabs

No Web Tabs have been defined

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

Management

Recently Viewed

0 items • Updated a few seconds ago

Management Name

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

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

Hyperforce Assistant

Users

Profiles

Data

Mass Transfer Approval Requests

Feature Settings

Data.com

Prospector Preferences

Prospector Users

Functions

Marketing

Lead Processes

Sales

Products

Asset Settings

SETUP Profiles

Profiles

All Profiles Edit Delete Create New View

New Profile

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

1-6 of 6 0 Selected 4 Previous Next 99 Page 1 of 1

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

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 Manager

Set the permissions and page layouts for this profile.

Profile Edit Save Save & New Cancel

Name Manager

User License Salesforce Platform

Description

Custom Profile ☒

Custom App Settings

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

Service Provider Access

Setup

Search Setup

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

Contact Point Consents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Emails	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Streaming Channels	<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			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:

Session Security Level Required at Login:

Password Policies

User passwords expire in:

Enforce password history:

Minimum password length:

Setup

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 Manager

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

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

[Learn More](#)

[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	10/10/2023, 3:47 pm	Modified	10/10/2023, 3:48 pm

Page Layouts

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

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

New User

User Edit Save Save & New Cancel

General Information

First Name: manager
Last Name: 1
Alias: m1
Email: manager.aaa@gmail.com
Username: manager.aaa@gmail.com
Nickname: 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

Search Setup

Setup Home Object Manager

Search: user

Users

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

New User

User Edit Save Save & New Cancel

General Information

First Name: manager
Last Name: 2
Alias: m2
Email: managerxyz.xyz@gmail.com
Username: managerxyz.xyz@gmail.com
Nickname: User1697624453759508865
Title:
Company:
Department:
Division:

Role: Marketing Team
User License: Salesforce
Profile: Solution Manager

Active: ☒
Marketing User: ☐
Offline User: ☐
Knowledge User: ☐
Flow User: ☐
Service Cloud User: ☐
Site.com Contributor User: ☐
Site.com Publisher User: ☐
WDC User: ☐

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

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

Search Setup

Setup Home Object Manager

per

Hyperforce Assistant

Lightning Experience Transition Assistant

Users

Permission Set Groups

Permission Sets

Feature Settings

Digital Experiences

Settings

Functions

Sales

Accounts

Person Accounts

Salesforce Scheduler

Assignment Policies

Salesforce Scheduler

SETUP Permission Sets

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

All Permission Sets Edit Delete Create New View

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

1-25 of 30 0 Selected

Page 1 of 2

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

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

Search Setup

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 manager12

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

Permission Set Overview

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

WhatsAppJob ProfileFlows | SalesforceFlow BuilderLightning Experience | Sales

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

GmailYouTubeMapsGlobal NetAcad i...Edube Interactive...

GmailYouTubeMaps

Search Setup

SetupHomeObject Manager

permi

Users

Permission Set Groups

Permission Sets

Custom Code

Custom Permissions

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

SETUP

Permission Sets

Permission Set Manager12

Find Settings...CloneEdit PropertiesManage AssignmentsView Summary (Beta)

Permission Set Overview > Object SettingsAccounts

AccountsSaveCancel

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"/>

Type here to search

31°C Rain showers16:0529-10-2023

GmailYouTubeMaps

Search Setup

SetupHomeObject Manager

user

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

SETUP

Users

All Users

On this page you can create, view, and manage users.
To get more licenses, use the Your Account app. [Let's Go](#)

View: All UsersEditCreate New View

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | All

New UserReset Password(s)Add Multiple Users

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	1_Bank	b1	bank1234@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Bank
<input type="checkbox"/> Edit	1_Customer	c1	customer1234@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Customer
<input checked="" type="checkbox"/> Edit	1_Manager	m1	manager4234@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Manager
<input type="checkbox"/> Edit	2_Manager	m2	manager.b23@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Contract Manager
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chattv.00d5h0000081f1nhea.p2cvy8dxjvhv@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User

Setup Home Object Manager

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	✓	Salesforce Platform	Never Expires

Cancel Back Assign

Setup Home Object Manager

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

manager12

Current Assignments

Add Assignment

Full Name	Active	Role	Profile	User License	Expires On
manager 1	✓	Marketing Team	Manager	Salesforce Platform	

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

Setup Home Object Manager

New Custom Object

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

Custom Object Definition Edit

Save Save & New Cancel

Custom Object Information

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

Label Example: Account

Plural Label Example: Accounts

Starts with vowel sound ☐

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

Object Name Example: Account

Description

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

Content Name

Enter Record Name Label and Format

The Record Name appears in page layouts, list views, related 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.

Setup Home Object Manager

New Custom Object Tab

Step 1 of 3

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

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

Object

Tab Style

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

Splash Page Custom Link

Enter a short description.

Description

Next Cancel

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

Address bar: nanmudhalvan-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0113h000000j07D/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

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

URL: https://nanmudhalvan-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0113h000000j07D/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

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

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

Address bar: 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](#)

Navigation: Setup, Home, Object Manager

Section: SETUP > OBJECT MANAGER Customer

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.

Main Content: Add custom field

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

Data Type

Select one of the data types below:

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

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

Address bar: 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](#)

Navigation: Setup, Home, Object Manager

Section: SETUP > OBJECT MANAGER Customer

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.

Main Content: New Relationship

Step 6. Add custom related lists

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

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

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

Add Related List: Page Layout Name
☒ Bank Layout

☒ Append related list to users' existing personal customizations

Buttons: Previous, Save & New, Save, Cancel

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

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

Search Setup

Setup Home Object Manager

Hyperforce Assistant

Users

Profiles

Data

Mass Transfer Approval Requests

Feature Settings

Data.com

Prospector Preferences

Prospector Users

Functions

Marketing

Lead Processes

Sales

Products

Asset Settings

SETUP Profiles

Profile: Standard Platform User

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

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

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

Profile Detail

Edit Clone View Users

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

Page Layouts

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

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

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

Search Setup

Setup Home Object Manager

Hyperforce Assistant

Users

Profiles

Data

Mass Transfer Approval Requests

Feature Settings

Data.com

Prospector Preferences

Prospector Users

Functions

Marketing

Lead Processes

Sales

Products

Asset Settings

SETUP Profiles

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

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

Save Cancel

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: Save Save & New Cancel

Name: Management

User License: Salesforce Platform

Description:

Custom Profile: ☒

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	Standard 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

Setup Home Object Manager

Search Setup

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

User Edit

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: ☐

Setup Home Object Manager

Search Setup

prof

Users

Profiles

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

SETUP Profiles

Sales Manager

Profile Edit

Name: Sales Manager

User License: Salesforce Platform

Description:

Custom Profile: ☒

Custom App Settings

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

Service Provider Access

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

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

1-25 of 31 0 Selected 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	don.j 15/10/2023, 4:06 pm
Permission Set Groups Added To	Last Modified By	don.j 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

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

Search Setup

Setup | Home | Object Manager

Search: per

Hyperforce Assistant
Lightning Experience Transition Assistant

Users

- Permission Set Groups
- Permission Sets**
- 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 | Object Settings | **Accounts**

Accounts Save Cancel

Object Permissions

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

Field Permissions

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

Search Setup

Setup | Home | Object Manager

Search: user

Users

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

All Users

1 item selected

Search this list...

	Full Name ↑	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Chatter Expert	Chatter	chatty00d5j00000dpedgeat.xpp33et8ipjd@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	Consumer 1	c1	cons21@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Consumer
<input type="checkbox"/>	Integration User	integ	integration@00d5j00000dpedgeat.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	John Teddy	jtedd	jt513@gmail.com	Vehicle Manager	<input checked="" type="checkbox"/>	Vehicle Manager
<input checked="" type="checkbox"/>	Manager 1	m1	manager0121@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Manager
<input type="checkbox"/>	Providers 1	p1	prov12@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Provider
<input type="checkbox"/>	SANDHIYA RAJA	SRAJA	sandhiya@avs.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Security User	sec	insightssecurity@00d5j00000dpedgeat.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

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

Address bar: nanudhalvan-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...

Total Life Time Value	Name
Full-screen Snap	

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