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Salesforce Developer(Course)  
Assignment

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Year & Dep : 4th year & IT  
Batch : 2024  
Zone no : Zone 8

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

Screenshot of the Salesforce Setup interface showing the creation of a new custom object named "College".

**New Custom Object**

Custom Object Definition Edit

**Custom Object Information**

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

**Label:** College (Example: Account)  
**Plural Label:** Colleges (Example: Accounts)  
**Starts with vowel sound:**

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

**Object Name:** College (Example: Account)

**Description:**

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

Help for this Page

Screenshot of the Salesforce Setup interface showing the creation of a new custom object named "Department".

**New Custom Object**

Custom Object Definition Edit

**Custom Object Information**

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

**Label:** Department (Example: Account)  
**Plural Label:** Departments (Example: Accounts)  
**Starts with vowel sound:**

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

**Object Name:** Department (Example: Account)

**Description:**

**Content-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.

Help for this Page

Screenshot of the Salesforce Object Manager setup page for the 'College' object.

**Object Manager** - Step 4 of 4

**Step 4. Add custom related lists**

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

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

Buttons: Previous, Save & New, Save, Cancel

Help for this Page

Setup Home Object Manager

Search Setup

College

Help for this Page

Previous Save & New Save Cancel

20.59

Screenshot of the Salesforce Tabs setup page.

**Tabs** - Step 1 of 1

**Custom Tabs**

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

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

**Custom Object Tabs**

Action	Label	Tab Style	Description
Edit   Del	Colleges	Building Block	
Edit   Del	Departments	Credit card	
Edit   Del	Employees	Diamond	
Edit   Del	Expenditure products	Lightning	
Edit   Del	Inventories	CD/DVD	
Edit   Del	our_customers	Bottle	
Edit   Del	Properties	Airplane	
Edit   Del	retailers	Highway Sign	
Edit   Del	Skincare products	Mail	
Edit   Del	Students	Triangle	

**Web Tabs**

Action	Label	Tab Style	Description
New	What Is This?		

Help for this Page

Setup Home Object Manager

Search Setup

Custom Tabs

Help for this Page

Custom Object Tabs

New What Is This?

Action Label Tab Style Description

Edit | Del Colleges Building Block

Edit | Del Departments Credit card

Edit | Del Employees Diamond

Edit | Del Expenditure products Lightning

Edit | Del Inventories CD/DVD

Edit | Del our\_customers Bottle

Edit | Del Properties Airplane

Edit | Del retailers Highway Sign

Edit | Del Skincare products Mail

Edit | Del Students Triangle

New What Is This?

Web Tabs

New What Is This?

22.21

Screenshot of the Salesforce Object Manager interface for the 'Department' object.

The left sidebar shows the following navigation:

- Details
- Fields & Relationships** (selected)
- 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

The main content area displays various field types with their descriptions:

- 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 pop-up calendar.
- Date/Time: Allows users to enter a date and time, or pick a date from a pop-up calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
- Email: Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
- Geolocation: Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
- Number: Allows users to enter any number. Leading zeros are removed.
- Percent: Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.
- Phone: Allows users to enter any phone number. Automatically formats it as a phone number.
- Picklist: Allows users to select a value from a list you define.
- Picklist (Multi-Select): Allows users to select multiple values from a list you define.
- Text: Allows users to enter any combination of letters and numbers.
- Text Area: Allows users to enter up to 255 characters on separate lines.
- Text Area (Long): Allows users to enter up to 131,072 characters on separate lines.
- Text Area (Rich): Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.
- Text (Encrypted): Allows users to enter any combination of letters and numbers and store them in encrypted form.
- Time: Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:50:600" are all valid times for this field.
- URL: Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

At the bottom right of the main content area are 'Next' and 'Cancel' buttons.

Screenshot of the 'New Custom Field' configuration page for the 'Department' object.

The left sidebar shows the same navigation as the previous screenshot.

The main content area is titled 'Step 2. Enter the details' and includes the following fields:

- Field Label:  (with a small info icon)
- Field Name:  (with a small info icon)
- Description: (empty text area)
- Help Text: (empty text area)
- 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 (with a small info icon)

Below these settings is a 'Default Value' section with a 'Show Formula Editor' button. A tooltip for the formula editor explains its syntax: "Use formula syntax. Enclose text and picklist value with names in double quotes. '{!the\_field}' include numbers without quotes. {!PI} show percentages as decimal. {!TODAY} and express date calculations in the standard format: {!TODAY} + 7. To reference a field from a Custom Metadata type record use: \${CustomMetadataType\_\_r.records[0].field\_\_c}"

At the top right of the configuration page are 'Step 2 of 4', 'Previous', 'Next', and 'Cancel' buttons.

Screenshot of the Salesforce Object Manager - Department page showing various field types and their descriptions.

**Fields & Relationships**

- Currency
- Date
- Date/Time
- Email
- Geolocation
- Number
- Percent
- Phone**
- Picklist
- Picklist (Multi-Select)
- Text
- Text Area
- Text Area (Long)
- Text Area (Rich)
- Text (Encrypted) (1)
- Time
- URL

Descriptions for each field type:

- 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 pop-up calendar.
- Allows users to enter a date and time, or pick a date from a pop-up 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.

Screenshot of the Salesforce Object Manager - Department page showing the creation of a new custom field.

**New Custom Field**

**Step 2. Enter the details**

Field Label: Dept\_No.

Field Name: Dept\_No

Description:

Help Text:

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

Auto add to custom report type:  Add this field to existing custom report types that contain this entity (1)

Default Value: Show Formula Editor

Use formula editor. Enclose text and picklist value with quotes in double quotes ("Dept\_No"). Include modulus without quotes (%). Shows percentages as decimal (.10), and performs date calculations in the standard format (Today() \* 7). To reference a field from a Custom-Metadata type record use: \$CustomMetadata.Type\_\_mdt.AliasName\$Field\_\_c

Next Cancel

(1) WhatsApp X Job Profile X Recently Viewed | our\_customers X Department | Salesforce +

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

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

Scoping Rules

Triggers

Flow Triggers

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)		▼

Quick Find New Deleted Fields Field Dependencies Set History Tracking

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

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

Full-screen Snp

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

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

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

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

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

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

Next 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

### 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  
 College Layout  
 Append related list to users' existing personal customizations

Help for this Page

Step 6 of 6

Previous Save & New Save Cancel

Previous Save & New Save Cancel

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

Full-screen Setup

Select one of the data types below.

None Selected

Auto Number

Formula

Roll-Up Summary

Lookup Relationship

Master-Detail Relationship

External Lookup Relationship

Checkbox

Currency

Date

File

Long Text

Long Text (Rich Text)

Number

Percent

Phone

Text

URL

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

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

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

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

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

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

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

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

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

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

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

Cloud icon

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 New Custom Field

Step 2. Enter the details Step 2 of 5

Field Label: Total Count

Field Name: Total\_Count

Description:

Help Text:

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

Previous Next Cancel

Cloud icon

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER College

Details

**Fields & Relationships**

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts

Step 3. Define the summary calculation Step 3 of 5

Select Object to Summarize

Master Object: College  
Summarized Object: Department

Select Roll-Up Type

COUNT  
 SUM  
 MIN  
 MAX

Field to Aggregate: None

Filter Criteria

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

Previous Next Cancel

Cloud icon

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

Fields & Relationships

5 items, Sorted by Field Label

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

Cloud icon

Setup Home Object Manager

Q app m

Apps

App Manager

User Interface

App Menu

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

SETUP

Lightning Experience App Manager

New Lightning App New Connected App

22 items • Sorted by App Name • Filtered by All appmitems - TabSet Type

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

<https://na0.salesforce-dev-ed.lightning.force.com/lightning/app/#/setup/nav/ribbonMenu/home>

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

\* Developer Name

Description

**App Branding**

Image  Primary Color Hex Value

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	<input checked="" type="checkbox"/>
14	Sales	Sales	The world's most popular sales force automation (SFA) solution	01/10/2023, 6:39 am	Classic	<input type="checkbox"/>
15	Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	01/10/2023, 6:39 am	Lightning	<input checked="" type="checkbox"/>

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

\* Developer Name

Description

**App Branding**

Image  Primary Color Hex Value

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	<input checked="" type="checkbox"/>
14	Sales	Sales	The world's most popular sales force automation (SFA) solution	01/10/2023, 6:39 am	Classic	<input type="checkbox"/>
15	Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	01/10/2023, 6:39 am	Lightning	<input checked="" type="checkbox"/>

**New Lightning App**

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

**Navigation and Form Factor**

**Setup and Personalization**

**Setup Experience**

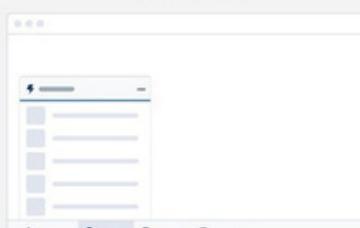
**App Personalization Settings**

**Back** **Next**

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

**New Lightning App**

The utility bar is a fixed footer that opens components in docked panels. Available only when the app is viewed in Lightning Experience on a desktop.



To enable the utility bar for this app, add a utility item.

**Back** **Next**

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

**New Lightning App**

**App Details**

\* App Name: My\_App

\* Developer Name: My\_App

Description: Enter a description...

**App Branding**

Image:  Upload

Primary Color Hex Value: #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

13 Queue Management QueueManagement Create and manage queues for your business. 01/10/2023, 6:39 am Lightning ✓

14 Sales Sales The world's most popular sales force automation (SFA) solution 01/10/2023, 6:39 am Classic ✓

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

**New Lightning App**

**Available Profiles**

sy

Salesforce API Only System Integrations

**Selected Profiles**

System Administrator

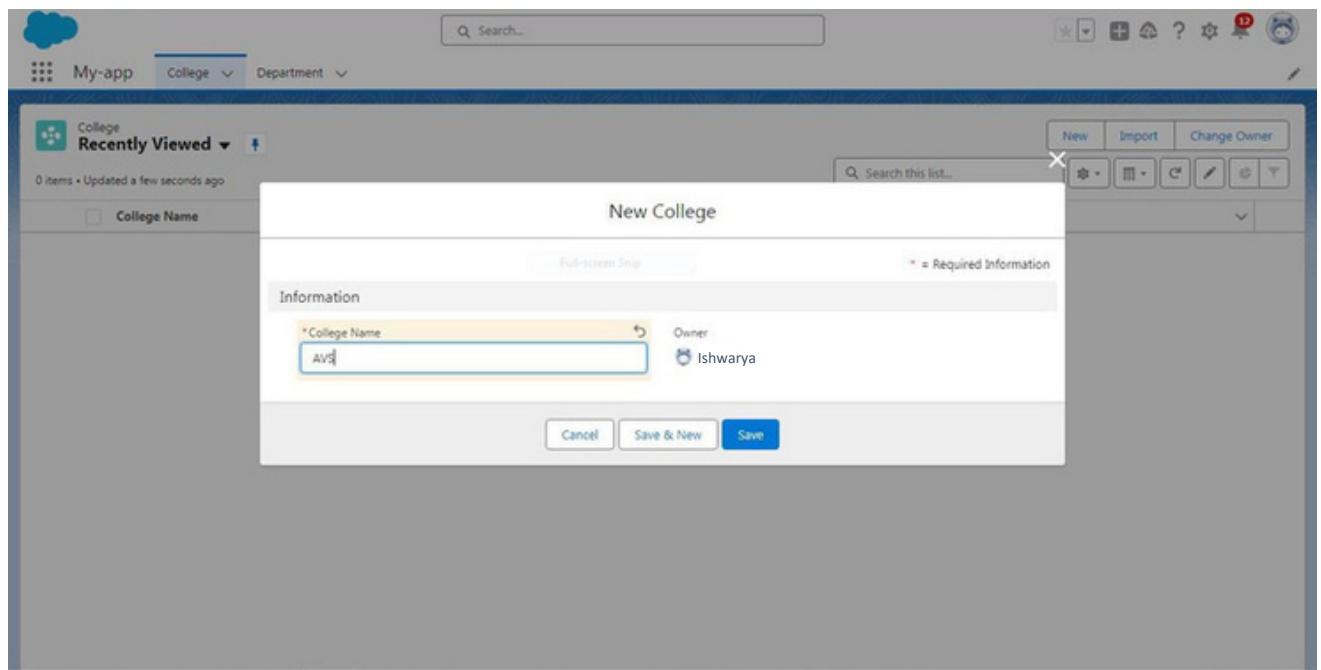
Save & Finish

Back

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 ✓



This screenshot shows a CRM application interface. At the top, there's a navigation bar with a cloud icon, the text "My-app", and dropdown menus for "College" and "Department". A search bar is located at the top right. Below the header, the main area displays a record for a college named "AVS". The record includes fields for "College Name" (AVS), "Total Count" (0), and two timestamped activity logs: "Created By" (Ishwarya) on 18/10/2023, 3:28 pm, and "Last Modified By" (Ishwarya) on the same date and time. There are tabs for "Related" and "Details", with "Details" being the active tab.

This screenshot shows a CRM application interface with a modal window titled "New Department". The modal has a "Information" section containing fields for "Department Name" (CSE), "Email" (cse@gmail.com), "Phone" (1234567899), and "College" (AVS). A note indicates that the "College" field is required. The background shows a sidebar with a "Recently Viewed" section and a toolbar with various icons.

My-app College Department

Department CSE was created.

Related Details

Department Name  
CSE

Email  
cse@gmail.com

Phone  
1234567899

College  
AVS

Created By  
Ishwarya 18/10/2023, 3:29 pm

Last Modified By  
Ishwarya 18/10/2023, 3:29 pm

New Contact Edit New Opportunity

My-app College Department

College AVS

Related Details

College Name  
AVS

Total Count  
1

Created By  
Ishwarya 18/10/2023, 3:28 pm

Last Modified By  
Ishwarya 18/10/2023, 3:29 pm

New Contact Edit New Opportunity

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.

Screenshot of the Salesforce Setup interface showing the creation of a new custom object named "Details".

The "Custom Object Definition Edit" section includes:

- Custom Object Information:** Label: Details, Plural Label: Details, Starts with vowel sound:
- Object Name:** Object Name: Details, Example: Account
- Description:** A large text area for entering a description.
- Content-Sensitive Help Setting:** Open the standard Salesforce.com Help & Training window (selected).
- Content Name:** None

A message at the top states: "Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles." Buttons for Save, Save & New, and Cancel are available.

The browser address bar shows: nanmudhalvan-dev-ed.lightning.force.com/lightning/setup/ObjectManager/new

Screenshot of the Salesforce Setup interface showing the "Details" object details page.

The left sidebar lists various configuration options under "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, and Flow Triggers.

The main "Details" section displays the following settings:

- Description:** A text input field.
- API Name:** Details\_c
- Custom:** ✓
- Singular Label:** Details
- Plural Label:** Details
- Enable Reports:** A checkbox.
- Track Activities:** A checkbox.
- Track Field History:** A checkbox.
- Deployment Status:** Deployed
- Help Settings:** Standard salesforce.com Help Window

Buttons for Edit and Delete are located in the top right corner.

The browser address bar shows: nanmudhalvan-dev-ed.lightning.force.com/lightning/setup/ObjectManager/015h000000j0s1/Details/View

WhatsApp | Job Profile | Details | Salesforce | Lightning Experience | Sales| +

nanmudhalvan-dev-ed.lightning.force.com/lightning/setup/ObjectManager/011sh000000j05/FieldsAndRelationships/view

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

Setup Home Object Manager

SETUP > OBJECT MANAGER Details

**Fields & Relationships**  
4 items, Sorted by Field Label

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

Quick Find New Deleted Fields Field Dependencies Set History Tracking

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

7.JPG Details | Salesforce - Google arun2 NM assignment

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nanmudhalvan-dev-ed.lightning.force.com/lightning/setup/ObjectManager/011sh000000j05/FieldsAndRelationships/new

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Setup Home Object Manager

SETUP > OBJECT MANAGER Details

**Fields & Relationships**

- Lookup Relationship
- Master Detail Relationship
- External Lookup Relationship
- Checkbox
- Currency
- Date
- DateTime
- Email
- Geolocation
- Number
- Percent
- Phone
- Picklist
- Picklist (Multi-Select)
- Text

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

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

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

The relationship field allows users to click on a lookup icon to summarize the detail records. The master object is the source of the values in the list.

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

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

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

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

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

7.JPG Details | Salesforce - Google arun2 NM assignment

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Cloud Setup Home Object Manager Search Setup

SETUP > OBJECT MANAGER Details

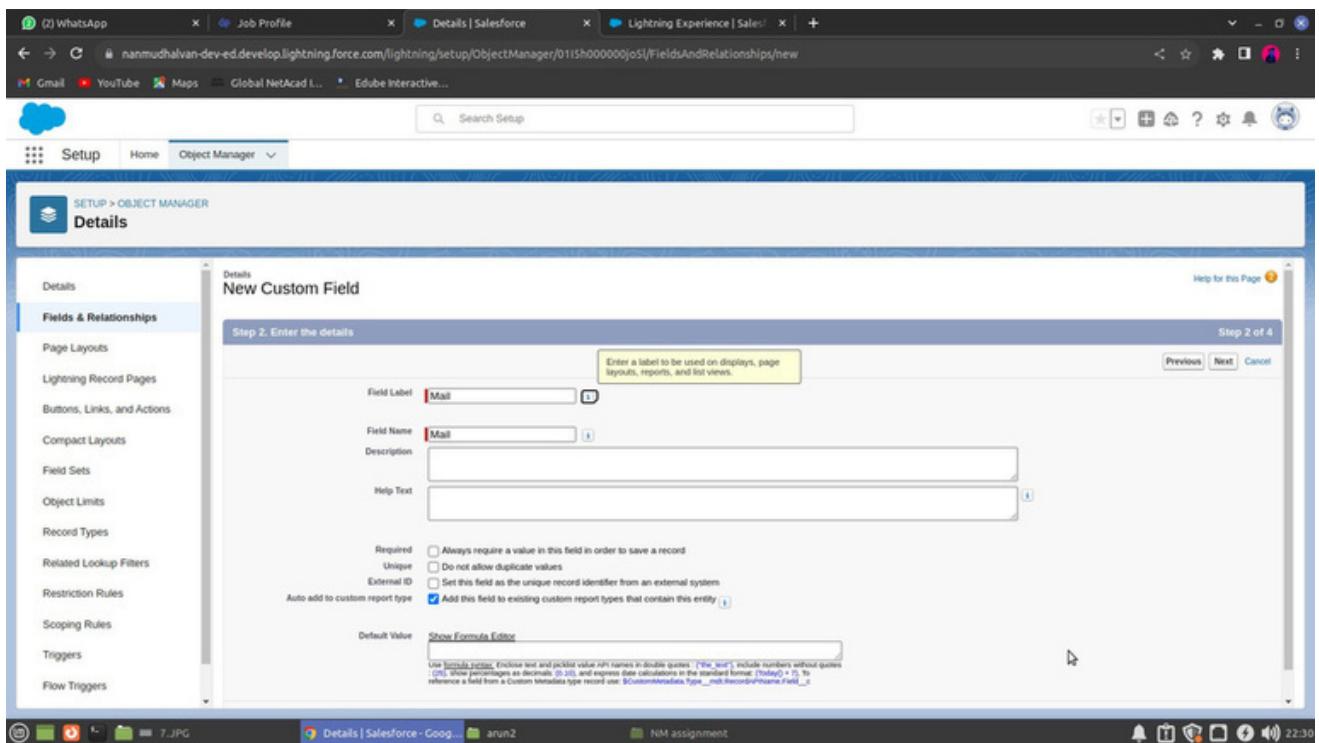
Details New Custom Field Step 2 of 4

Field Label: Mail  
Field Name: Mail  
Description:  
Help Text:  
Required:  Always require a value in this field in order to save a record  
Unique:  Do not allow duplicate values  
External ID:  Set this field as the unique record identifier from an external system  
Auto add to custom report type:  Add this field to existing custom report types that contain this entity  
Default Value: Show Formula Editor

Help for this Page

Previous Next Cancel

7.JPG Details | Salesforce - Google arun2 NM assignment 22:30



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Cloud Setup Home Object Manager Search Setup

SETUP > OBJECT MANAGER Details

Details New Custom Field Step 4 of 4

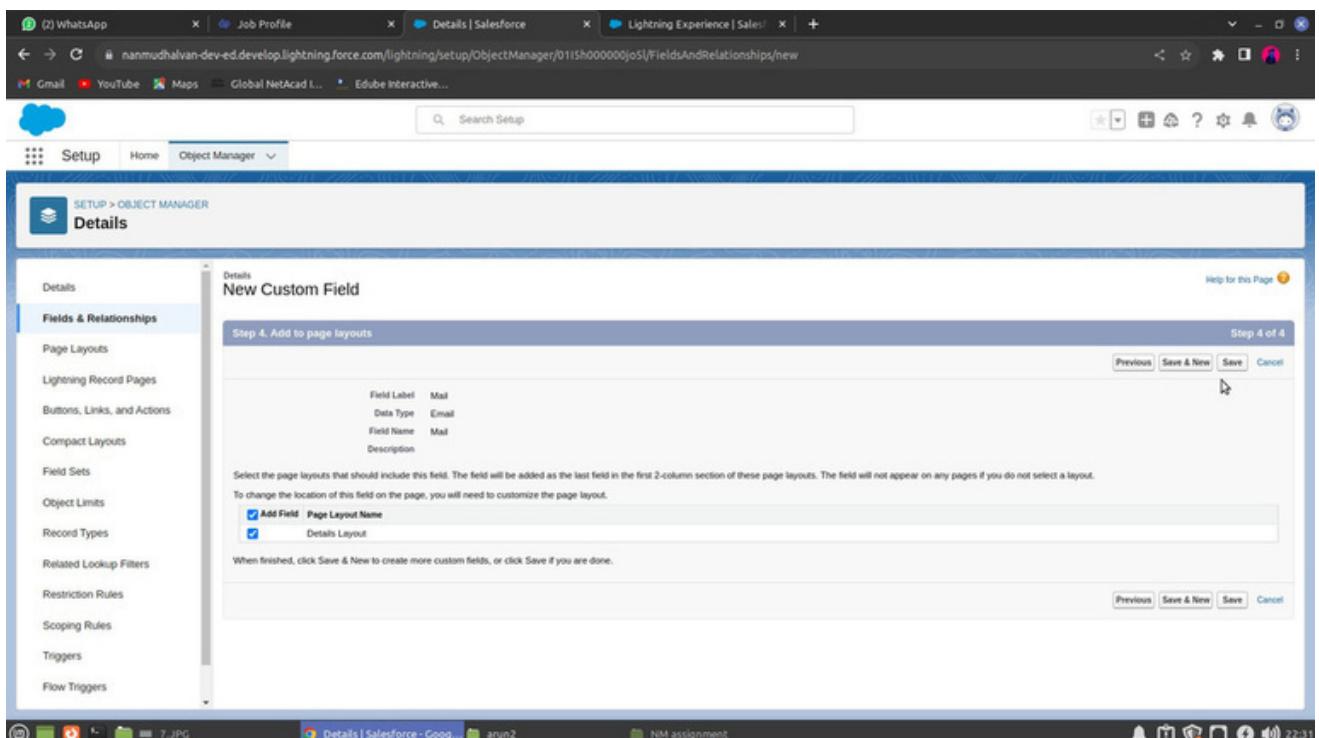
Field Label: Mail  
Data Type: Email  
Field Name: Mail  
Description:

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

7.JPG Details | Salesforce - Google arun2 NM assignment 22:31



Screenshot of the Salesforce Object Manager - Details page for a custom object.

The left sidebar shows navigation links: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, Scoping Rules, Triggers, and Flow Triggers.

The main content area displays a list of field types:

- 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. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
- Date/Time: 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.
- Email: Allows users to define location. Includes latitude and longitude components, and can be used to calculate distance.
- Geolocation: Allows users to enter any number. Leading zeros are removed.
- Number: Allows users to enter a percentage number, for example, '2%' and automatically adds the percent sign to the number.
- Percent: Allows users to enter any phone number. Automatically formats it as a phone number.
- Picklist: Allows users to select a value from a list you define.
- Picklist (Multi-Select): Allows users to select multiple values from a list you define.
- Text: Allows users to enter any combination of letters and numbers.
- Text Area: Allows users to enter up to 255 characters on separate lines.
- Text Area (Long): Allows users to enter up to 131,072 characters on separate lines.
- Text Area (Rich): Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.
- Text (Encrypted): Allows users to enter any combination of letters and numbers and store them in encrypted form.
- Time: Allows users to enter a local time. For example, '2:40 PM', '14:40', '14:40:00', and '14:40:50.600' are all valid times for this field.
- URL: Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

Buttons at the bottom right: Next, Cancel.

Screenshot of the Salesforce Object Manager - Details page for Step 2: Enter the details of a New Custom Field.

The left sidebar shows navigation links: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, Scoping Rules, Triggers, and Flow Triggers.

The main content area shows the "Step 2. Enter the details" section for a "New Custom Field".

Form fields:

- Field Label: Phone
- Field Name: Phone
- Description: (empty)
- Help Text: (empty)

Required settings:

- Always require a value in this field in order to save a record:
- Add this field to existing custom report types that contain this entity:

Default Value: Show Formula Editor

Help text for Default Value:

Use formula editing. Enclose text and picklist value API names in double quotes ('The word'), include numbers without quotes (123), show percentages as decimal (.123), and express date calculations in the standard format (Today() + 7). To reference a field from a Custom Metadata type record use: \${CustomMetadataType\_\_r.RecordId}/Phone\_\_c

Buttons at the top right: Help for this Page, Step 2 of 4, Previous, Next, Cancel.

Buttons at the bottom right: Previous, Next, Cancel.

Salesforce Setup Page - Details of a New Custom Field

The page shows the 'Details' tab selected under 'Fields & Relationships'. The field being created is named 'Phone' with a label 'Phone'. It is set to be added to the 'Details Layout'. The status bar indicates 'Step 4 of 4'.

Details of 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.

Help for this Page

Salesforce Setup Page - Fields & Relationships

The page shows the 'Fields & Relationships' tab selected under 'Fields & Relationships'. A list of field types is shown on the left, each with a brief description on the right.

Field Type	Description
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, '17' and automatically adds the percent sign to the number.
Phone	Allows users to enter any phone number. Automatically formats it as a phone number.
Picklist	Allows users to select a value from a list you define.
Picklist (Multi-Select)	Allows users to select multiple values from a list you define.
Text	Allows users to enter any combination of letters and numbers.
Text Area	Allows users to enter up to 255 characters on separate lines.
Text Area (Long)	Allows users to enter up to 131,072 characters on separate lines.
Text Area (Rich)	Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.
Text (Encrypted) 	Allows users to enter any combination of letters and numbers and store them in encrypted form.
Time	Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:50.600" are all valid times for this field.
URL	Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

Salesforce Setup - Details | Object Manager

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 editor. Enclose text and picklist value API names in double quotes ('the\_text'), include numbers without quotes ('123'), show percentages as decimal (.123), and express date calculations in the standard format (Today() + 7). To reference a field from a Custom Metadata type record use: \${CustomMetadataType\_\_mdt.RecordName.FieldName}

Help for this Page

Previous Next Cancel

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

Salesforce Setup - Details | Object Manager

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

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

Screenshot of the Salesforce Setup interface showing the "Fields & Relationships" section of the Object Manager.

The left sidebar shows navigation links: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, Scoping Rules, Triggers, and Flow Triggers.

The main content area displays a list of field types:

- 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

Each field type has a brief description:

- Checklist: 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.
- Currency: Allows users to enter a date or pick a date from a popup calendar.
- Date: 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.
- Date/Time: 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.
- Email: Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
- Geolocation: Allows users to enter any number. Leading zeros are removed.
- Number: Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.
- Percent: Allows users to enter any phone number. Automatically formats it as a phone number.
- Phone: Allows users to select a value from a list you define.
- Picklist (selected): Allows users to select multiple values from a list you define.
- Picklist (Multi-Select): Allows users to enter any combination of letters and numbers.
- Text: Allows users to enter up to 255 characters on separate lines.
- Text Area (Long): Allows users to enter up to 131,072 characters on separate lines.
- Text Area (Rich): Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.
- Text (Encrypted): Allows users to enter any combination of letters and numbers and store them in encrypted form.
- Time: Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:50.600" are all valid times for this field.
- URL: Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

At the bottom right are "Next" and "Cancel" buttons.

Screenshot of the Salesforce Setup interface showing the "New Custom Field" configuration page.

The left sidebar shows navigation links: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, Scoping Rules, Triggers, and Flow Triggers.

The main content area shows "Step 2. Enter the details" for a "New Custom Field".

Form fields include:

- Field Label: Gender
- Values:
  - Use global picklist value set (radio button)
  - Enter values, with each value separated by a new line (radio button, selected)
- Value entries:
  - Male
  - Female
- Checkboxes:
  - Display values alphabetically, not in the order entered
  - Use first value as default value
  - Restrict picklist to the values defined in the value set (checkbox, selected)
- Field Name: Gender
- Description: (empty)
- Help Text: (empty)

At the top right is "Help for this Page" and at the bottom right are "Previous", "Next", and "Cancel" buttons.

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nanmudhalvan-dev-ed.lightning.force.com/lightning/setup/ObjectManager/015h000000j0S/FieldsAndRelationships/new

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Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER Details

Details 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

7.JPG Details | Salesforce - Google arun2 NM assignment

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nanmudhalvan-dev-ed.lightning.force.com/lightning/setup/ObjectManager/015h000000j0S/FieldsAndRelationships/view

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Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER Details

Fields & Relationships 8 items. Sorted by Field Label

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

8.JPG

7.JPG Details | Salesforce - Google arun2 NM assignment

Salesforce 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:

Help for this Page

Next Cancel

\_tabs

User Interface

Rename Tabs and Labels

Tabs

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

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Search Setup

Setup Home Object Manager

22:35

Salesforce 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

Action	Label	Tab Style	Description
Edit   Del	Collections	Building Block	
Edit   Del	Debts	Credit card	
Edit   Del	Details	Lightning	
Edit   Del	Favorites	Diamond	
Edit   Del	Expense products	Lightning	
Edit   Del	Inventories	CD/DVD	
Edit   Del	our customers	Bottle	
Edit   Del	Properties	Airplane	
Edit   Del	retailers	Highway Sign	
Edit   Del	Skincare products	Star	
Edit   Del	Students	Triangle	

New What Is This?

Help for this Page

\_tabs

User Interface

Rename Tabs and Labels

Tabs

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Setup Home Object Manager

22:36

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nanmudhalvan-dev-ed.lightning.force.com/lightning/setup/flows/home

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Cloud Setup Home Object Manager

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	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			

10.JPG Flows | Salesforce - Google Chrome arun2 NM assignment 22:37

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

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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.

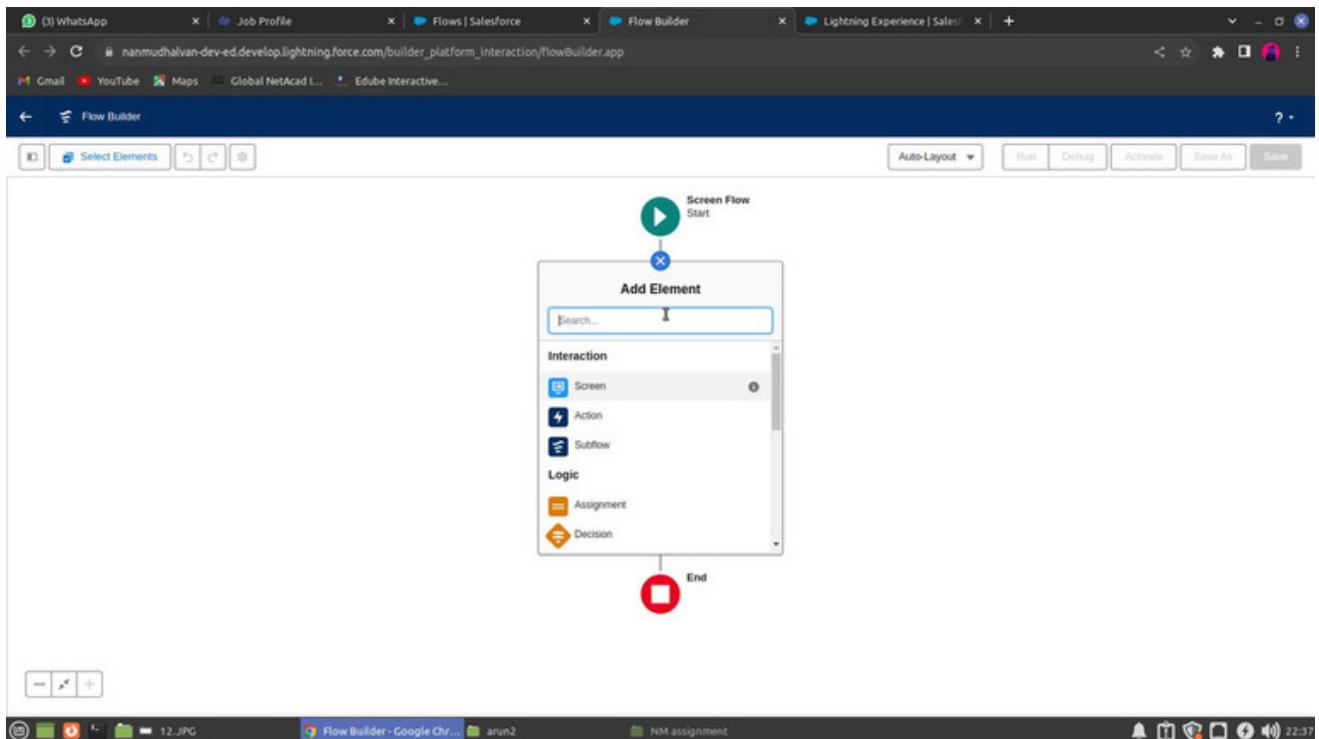
Autolaunched Flow (No Trigger)  
Launches when invoked by Apex, processes, REST API, and more. This autolaunched flow runs in the background.

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

Create

Get more on the AppExchange

11.JPG Flow Builder - Google Chrome arun2 NM assignment 22:37



New Screen

Components	Fields
Gen	<p>Name</p> <p>First Name First Name</p> <p>Last Name Last Name</p> <p>Email you@example.com</p> <p>Phone</p> <p>[Date]</p>

Get more on the AppExchange

Date

Label

API Name

Require

Default Value

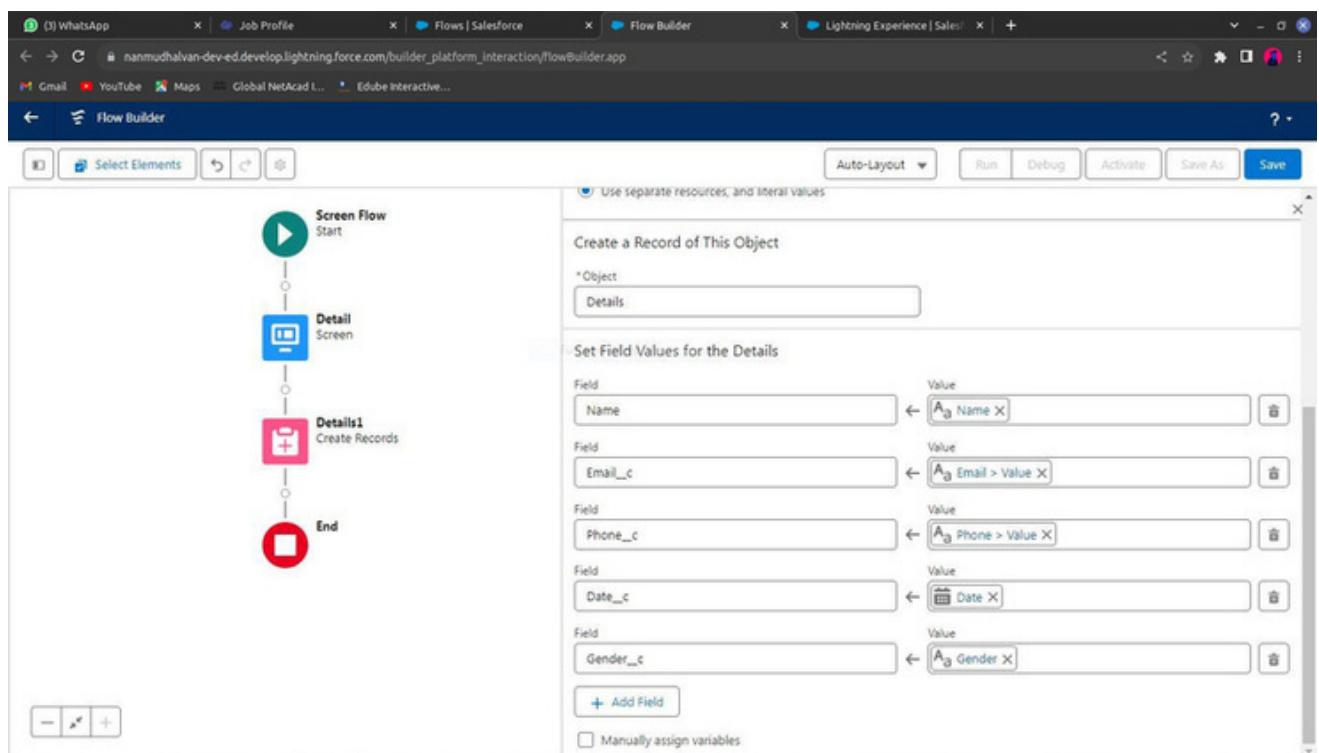
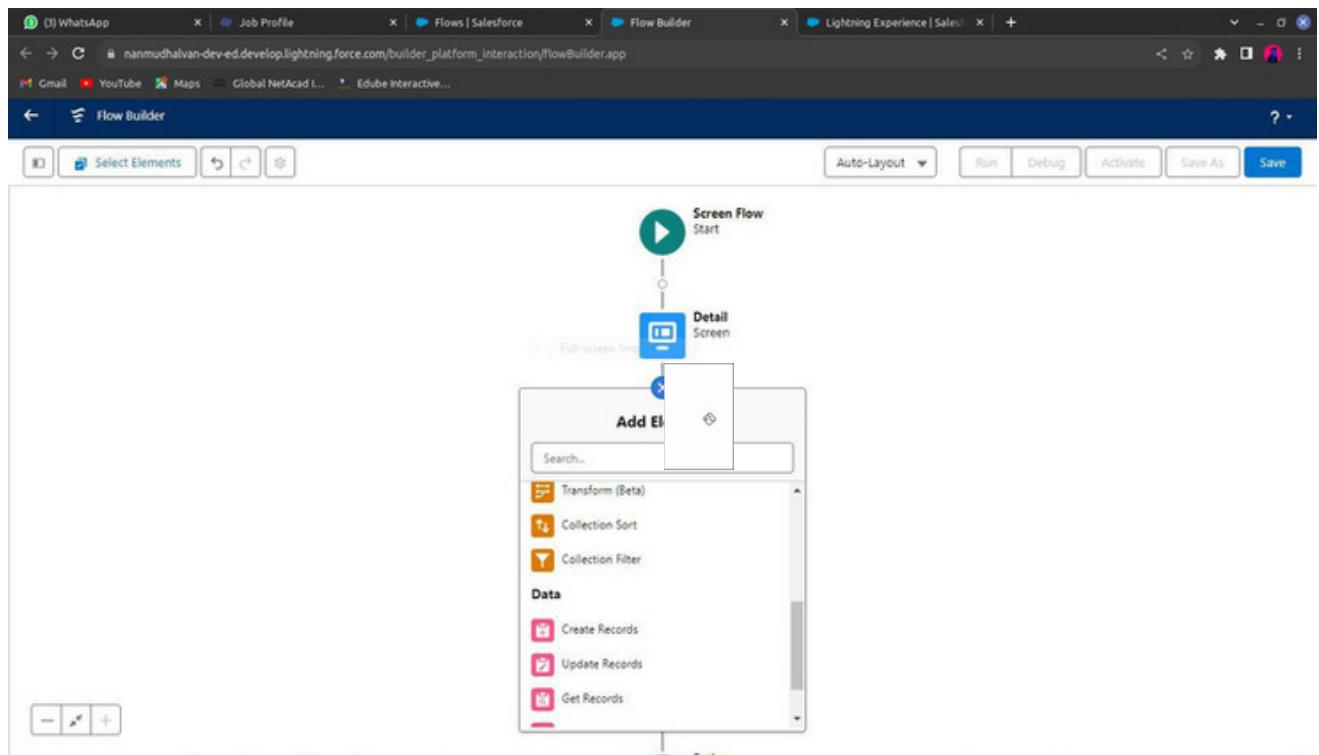
ddMMyyyy

Set Component Visibility

Validate Input

Provide Help

Cancel Done



Details12

Name	Ishwarya
Email	Ishwarya@gmail.com
Phone	1234567890
Date	18-Oct-2023
Gender	Female

[Next](#)

My-app

Details	Ishwarya	<a href="#">New Contact</a>	<a href="#">Edit</a>	<a href="#">New Opportunity</a>																
<table border="1"> <tr> <td>Related</td> <td>Details</td> </tr> <tr> <td>Details Name</td> <td>Ishwarya</td> </tr> <tr> <td>Email</td> <td>Ishwarya@gmail.com</td> </tr> <tr> <td>Phone</td> <td>1234567890</td> </tr> <tr> <td>Date</td> <td>18/10/2023</td> </tr> <tr> <td>Gender</td> <td>Female</td> </tr> <tr> <td>Created By</td> <td>Ishwarya 18/10/2023, 3:42 pm</td> </tr> <tr> <td>Last Modified By</td> <td>Ishwarya 18/10/2023, 3:42 pm</td> </tr> </table>					Related	Details	Details Name	Ishwarya	Email	Ishwarya@gmail.com	Phone	1234567890	Date	18/10/2023	Gender	Female	Created By	Ishwarya 18/10/2023, 3:42 pm	Last Modified By	Ishwarya 18/10/2023, 3:42 pm
Related	Details																			
Details Name	Ishwarya																			
Email	Ishwarya@gmail.com																			
Phone	1234567890																			
Date	18/10/2023																			
Gender	Female																			
Created By	Ishwarya 18/10/2023, 3:42 pm																			
Last Modified By	Ishwarya 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.

Screenshot of the Salesforce Setup interface showing the "New Custom Object" page.

The page title is "SETUP New Custom Object".

Custom Object Definition Edit

**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:  None

Enter Record Name Label and Format

The Record Name appears in name dropdowns, New Sicht, Related Lists, Analytics, 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 also called "Name" when referenced via the API.

Save | Save & New | Cancel

Help for this Page

Screenshot of the Salesforce Setup interface showing the "Tabs" page.

The sidebar shows "tabs" selected under "User Interface".

The main area title is "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:  Management

Tab Style:  Camera

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

Splash Page Custom Link:  None

Enter a short description.

Description:

Next | Cancel

Salesforce Setup interface showing the 'Tabs' section.

**Custom Object Tabs**

Action	Label	Tab Style	Description
Edit   Del	Colleves	Building Block	
Edit   Del	Deasments	Credit card	
Edit   Del	Details	Lightning	
Edit   Del	Favorites	Diamond	
Edit   Del	Erurance_products	Lightning	
Edit   Del	Inventories	CD/DVD	
Edit   Del	Managements	Camera	
Edit   Del	our_customers	Bottle	
Edit   Del	Properties	Airplane	
Edit   Del	retailers	Highway Sign	
Edit   Del	Skincare_products	Star	
Edit   Del	Students	Triangle	

**Web Tabs**

No Web Tabs have been defined.

Bottom Taskbar:

- Icons for WhatsApp, Job Profile, Flows, Flow Builder, Lightning Experience, and others.
- File Explorer icon: 3.JPG
- User Profile: arun3
- Assignment: NM assignment
- System icons: Bell, Help, Home, etc.
- Time: 22:44

Salesforce Setup interface showing the 'Management' section under 'Recently Viewed'.

**Management**

**Recently Viewed**

0 items • Updated a few seconds ago

Management Name

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

Bottom Taskbar:

- Icons for WhatsApp, Job Profile, Flows, Flow Builder, Lightning Experience, and others.
- File Explorer icon: 3.JPG
- User Profile: arun3
- Assignment: NM assignment
- System icons: Bell, Help, Home, etc.
- Time: 22:44

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Search Setup

Setup Home Object Manager

Q pro

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"/>	Salesforce API Only System Integrations	Salesforce Integration	<input type="checkbox"/>
<input type="checkbox"/>	Silver Panther User	Silver Panther	<input type="checkbox"/>
<input type="checkbox"/>	Solution Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/>	Standard Platform User	Salesforce Platform	<input type="checkbox"/>
<input type="checkbox"/>	Standard User	Salesforce	<input type="checkbox"/>
<input type="checkbox"/>	System Administrator	Salesforce	<input type="checkbox"/>

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 Other All

1-6 of 6 0 Selected 4 Previous Next > 10 Page 1 of 1

Help for this Page

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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	Custom Profile
Description				<input checked="" type="checkbox"/>

Custom App Settings \* Required Information

	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

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Search Setup

Setup Home Object Manager

Profiles

Contact Point Consents Full Read Write Modify Delete View All

Contact Point Emails Full Read Write Modify Delete View All

Streaming Channels Full Read Write Modify Delete View All

User External Credentials Full Read Write Modify Delete View All

Custom Object Permissions

	Basic Access	Read	Create	Edit	Delete	View All	Data Administration
College							
Department							
Details							
Management							

Session Settings

Session Times Out After 2 hours of inactivity

Session Security Level Required at Login None

Password Policies

User passwords expire in 90 days

Enforce password history 3 passwords remembered

Minimum password length 8

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

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Search Setup

Setup Home Object Manager

Profiles

Profile Manager

Full-screen Screenshot Help for this Page

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

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

Login IP Ranges | Enabled Apex Class Access | Enabled Visualforce Page Access | Enabled External Data Source Access | Enabled Named Credential Access | Enabled External Credential Principal Access | Enabled Custom Metadata Type Access | Enabled Custom Setting Definitions Access | Enabled Flow Access | Enabled Service Presence Status Access | Enabled Custom Permissions

Profile Detail

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

Page Layouts

Standard Object Layouts

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

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

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Learn more

Cloud Search Setup Object Manager

Setup Home Object Manager

Q user

v Users

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

v Feature Settings

- v Data.com
- Prospector Users
- v Service

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

SETUP

Users

New User

User Edit

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:

Help for this Page

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Q user

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- Permission Set Groups
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- Roles
- User Management Settings
- Users**

v Feature Settings

- v Data.com
- Prospector Users
- v Service

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

SETUP

Users

New User

User Edit

General Information

First Name: manager  
Last Name: 2  
Alias: m2  
Email: managerxyz. xyz@gmail.com  
Username: managerxyz. xyz@gmail.com  
Nickname: User1697624453758508665  
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:

Help for this Page

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Search Setup

Setup Home Object Manager

Q per

Hyperforce Assistant

Lightning Experience Transition Assistant

Users

Permission Set Groups

Permission Sets

Feature Settings

Digital Experiences

Settings

Functions

Sales

Accounts

Person Accounts

Salesforce Scheduler

Assignment Policies

Salesforce Scheduler

SETUP Permission Sets

Permission Sets Full-screen Setup Help for this Page

All Permission Sets Edit | Delete | Create New View

New

Action	Permission Set Label	Description	License
<input type="checkbox"/>	B2B	Allows access to the store. Lets users see products and c...	B2B Buyer Permission Set One Seat
<input type="checkbox"/>	Buyer Manager	Includes all Buyer capabilities, and allows access to mana...	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/>	C360 High Scale Flow Integration User	Allows integration user to access features specific to C360...	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, subloca...	Facility Manager

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 Other All

1-25 of 30 0 Selected Page 1 of 2

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Search Setup

Setup Home Object Manager

Q 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

manager12 Full-screen Setup Video Tutorial | Help for this Page

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

Permission Set Overview

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

Apps

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

Aligned 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

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Cloud icon

Search Setup

Setup Home Object Manager

Q per

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Users

- Permission Set Groups
- Permission Sets**

Feature Settings

- Digital Experiences
  - Settings
  - Functions
- Sales
  - Accounts
    - Person Accounts
- Salesforce Scheduler
  - Assignment Policies
  - Salesforce Scheduler

manager12

Full-screen Help Video Tutorial | Help for this Page

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

Permission Set Overview > Object Settings Accounts

Save | Cancel

Accounts

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"/>

Object Permissions

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

Field Permissions

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

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Cloud icon

Search Setup

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Users

- Permission Set Groups
- Permission Sets**

Feature Settings

- Digital Experiences
  - Settings
  - Functions
- Sales
  - Accounts
    - Person Accounts
- Salesforce Scheduler
  - Assignment Policies
  - Salesforce Scheduler

Select Users to Assign

All Users

1 item selected

Full Name ↑ All ↓ Role A... Profile

Full Name	All	Role	A...	Profile
Ishwarya	AJ	Ishwarya@gmail.com	<input checked="" type="checkbox"/>	System Administrator
Chatter Expert	Chatter	chatty.00d5j00000dq4hgeat3yy9pn6u4mm@chatter.s...	<input checked="" type="checkbox"/>	Chatter Free User
consumer_1	c1	cons143@gmail.com	<input checked="" type="checkbox"/>	Marketing Team consumer
Integration User	integ	integration@00d5j00000dq4hgeat	<input checked="" type="checkbox"/>	Analytics Cloud Integration Us...
manager_1	m1	managerabcabc@gmail.com	<input checked="" type="checkbox"/>	Marketing Team Manager

Cancel Next

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Cloud Search Setup Home Object Manager

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 Full-screen tips

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

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Cloud Search Setup Home Object Manager

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 Full-screen tips

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

Add Assignment

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

Screenshot of the Salesforce Setup interface showing the "New Custom Object" page.

The page title is "SETUP New Custom Object".

Custom Object Definition Edit

**Custom Object Information**

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

**Label:** Bank (Example: Account)

**Plural Label:** Banks (Example: Accounts)

**Starts with vowel sound:**

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

**Object Name:** Barik (Example: Account)

**Description:**

**Content Name:**  (Content-Sensitive Help Setting)  
Open the standard Salesforce.com Help & Training window  
Open a window using a Visualforce page

**Enter Record Name Label and Format**

The Record Name appears in name lists, 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.

Save Save & New Cancel

Help for this Page

Screenshot of the Salesforce Setup interface showing the "Tabs" page.

The sidebar shows "User Interface" and "Tabs" is selected.

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:** Bank (dropdown menu)

**Tab Style:**  Cards (radio button)

(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

Screenshot of the Salesforce Object Manager setup page for the 'Bank' object.

**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**

**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**

https://nanmudhalvan-dev-ed.lightning.force.com/lightning/setup/ObjectManager/015h000000jo7D/Details/view

Screenshot of the 'New Custom Object' setup 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**

**Custom Object Information**

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

**Label**: Customer | Example: Account  
**Plural Label**: Customers | Example: Accounts  
**Starts with vowel sound**:

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

**Object Name**: Customer | Example: Account

**Description**

**Context-Sensitive Help Setting**

Open the standard Salesforce.com Help & Training window  
 Open a window using a Visualforce page

**Content Name**: None

Enter Record Name Label and Format

The Record Name appears in name searches, save lists, related lists, inline edit, 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.

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

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Cloud Search Setup

Setup Home Object Manager

SETUP > 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 Snp

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

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

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

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

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

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

Next Cancel

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Cloud Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER Customer

Details

**Fields & Relationships**

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

New Relationship

Step 6 of 6

Help for this Page

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

Previous Save & New Save Cancel

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Search Setup

Setup Home Object Manager

Profiles

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

Standard Platform User

Full-screen Setup Help for this Page

Profile Detail

Name: Standard Platform User

User License: Salesforce Platform

Created By: salesforce.com, Inc., 17/10/2023, 10:41 am

Modified By: Admin, 18/10/2023, 3:34 pm

Custom Profile

Page Layouts

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

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Products

Asset Settings

Clone Profile

Full-screen Setup Help for this Page

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

WhatsApp Job Profile Flows | Salesforce Flow Builder Lightning Experience | Sales...

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

**Profiles**

Management

Set the permissions and page layouts for this profile.

Profile Edit

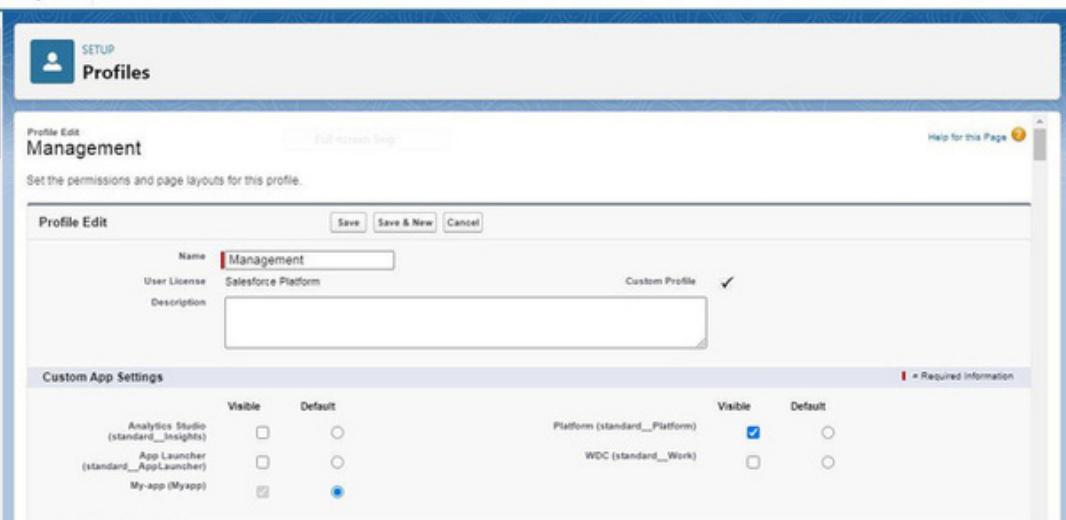
Name: Management User License: Salesforce Platform Description: Custom Profile

Custom App Settings

	Visible	Default	Visible	Default	
Analytics Studio (standard_Insights)	<input type="checkbox"/>	<input checked="" type="radio"/>	Platform (standard_Platform)	<input checked="" type="checkbox"/>	<input type="radio"/>
App Launcher (standard_AppLauncher)	<input type="checkbox"/>	<input checked="" 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

Required Information



WhatsApp Job Profile Flows | Salesforce Flow Builder Lightning Experience | Sales...

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

**Profiles**

Contact Point Consents

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"/>
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

User External Credentials	<input type="checkbox"/>					
User External Credentials	<input type="checkbox"/>					

Custom Object Permissions

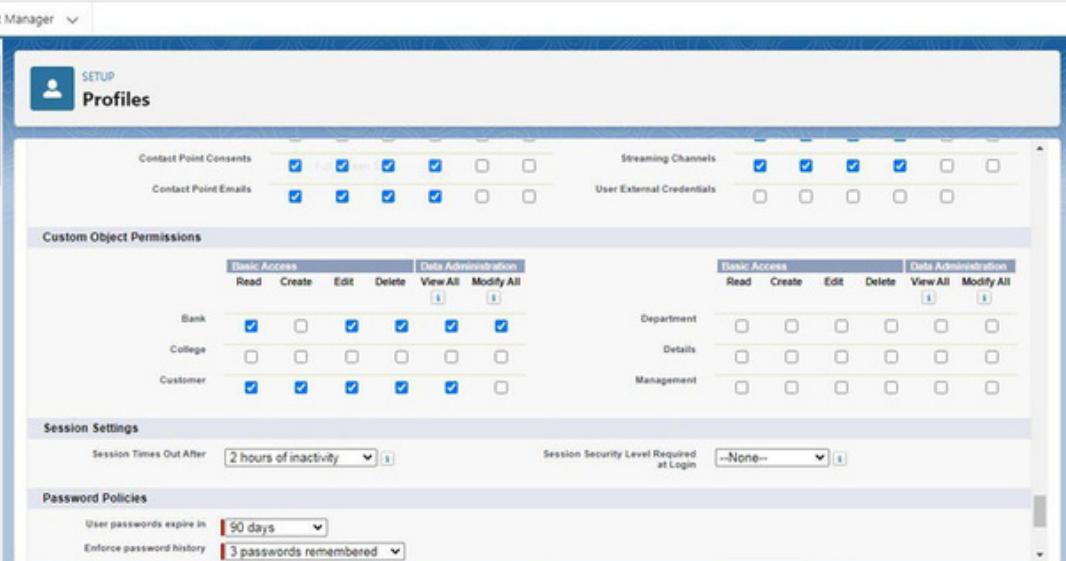
Object	Basic Access					Data Administration						
	Read	Create	Edit	Delete	View All	Modify All	Read	Create	Edit	Delete	View All	Modify All
Bank	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>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



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

Cloud Search Setup Object Manager

Q user

SETUP Users

New User Full-screen Help Help for this Page

User Edit Save Save & New Cancel

General Information \* Required Information

First Name	manager	Role	<None Specified>
Last Name	bank	User License	Partner App Subscription
Alias	mbank	Profile	Partner App Subscription User
Email	managerbank@gmail.com	Active	<input checked="" type="checkbox"/>
Username	managerbank@gmail.com	Marketing User	<input type="checkbox"/>
Nickname	User1697625040398307733	Offline User	<input type="checkbox"/>
Title		Knowledge User	<input type="checkbox"/>
Company		Flow User	<input type="checkbox"/>
Department		Service Cloud User	<input type="checkbox"/>
Division		Site.com Contributor User	<input type="checkbox"/>
		Site.com Publisher User	<input type="checkbox"/>
		WDC User	<input type="checkbox"/>

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

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Cloud Search Setup Object Manager

Q prof

SETUP Profiles

Sales Manager Full-screen Help Help for this Page

Profile Edit Save Save & New Cancel

Name Sales Manager User License Salesforce Platform Custom Profile

Description

Custom App Settings \* Required Information

	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

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Search Setup

Setup Home Object Manager

Q. pref

Users Profiles

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

**Profiles**

Contact Point Addresses Contact Point Consents Contact Point Emails

Sellers Streaming Channels User External Credentials

**Custom Object Permissions**

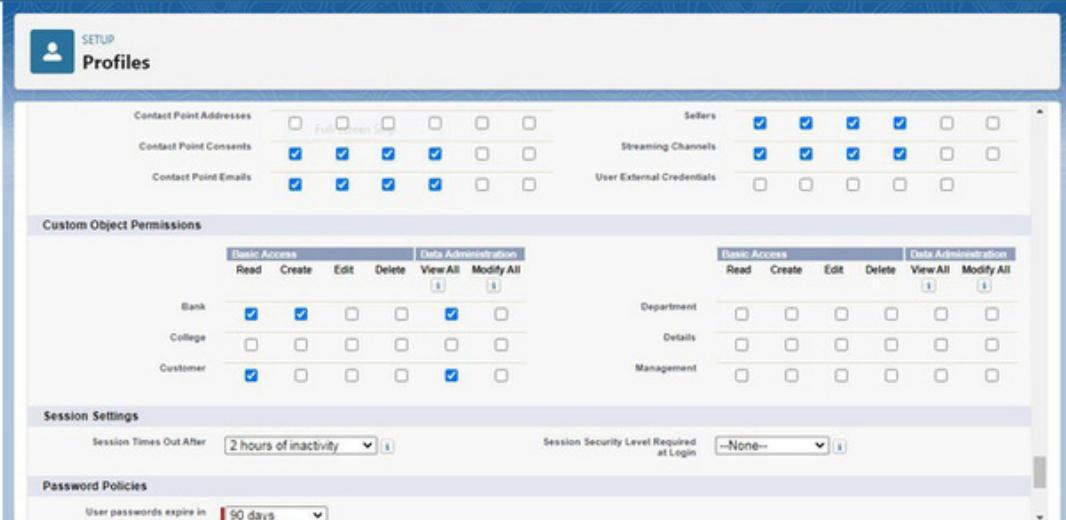
	Basic Access					Data Administration						
	Read	Create	Edit	Delete	View All	Modify All	Read	Create	Edit	Delete	View All	Modify All
Bank	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input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

**Session Settings**

Session Times Out After: 2 hours of inactivity Session Security Level Required at Login: None

**Password Policies**

User passwords expire in: 90 days



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Search Setup

Setup Home Object Manager

Q. pref

Users Profiles

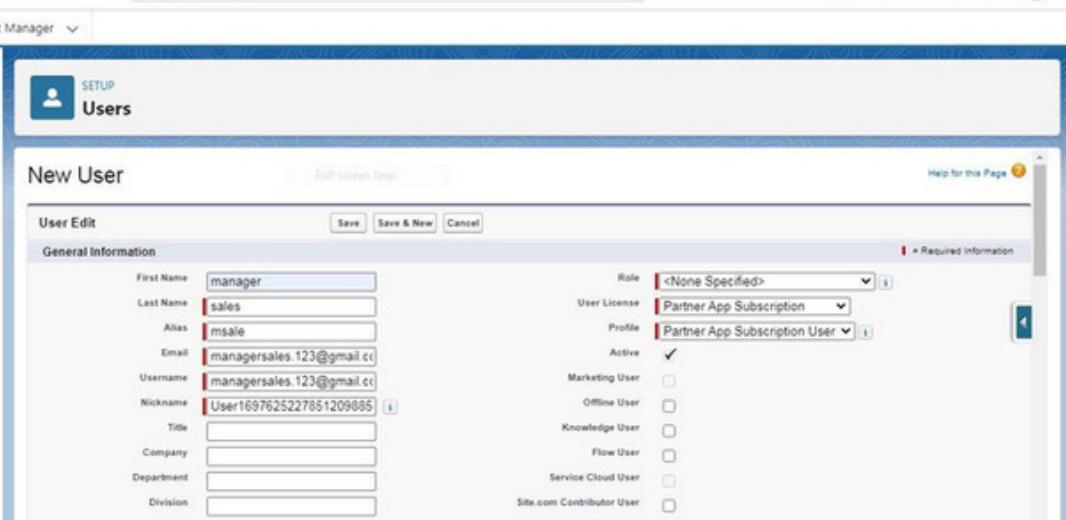
Didn't find what you're looking for? Try using Global Search.

**New User**

User Edit Save Save & New Cancel

**General Information**

First Name: manager	Role: <None Specified>
Last Name: sales	User License: Partner App Subscription
Alias: msale	Profile: Partner App Subscription User
Email: managersales.123@gmail.com	Active: <input checked="" type="checkbox"/>
Username: managersales.123@gmail.com	Marketing User: <input type="checkbox"/>
Nickname: User1697625227851209885	Offline User: <input type="checkbox"/>
Title:	Knowledge User: <input type="checkbox"/>
Company:	Flow User: <input type="checkbox"/>
Department:	Service Cloud User: <input type="checkbox"/>
Division:	Site.com Contributor User: <input type="checkbox"/>
	Site.com Publisher User: <input type="checkbox"/>
	WDC User: <input type="checkbox"/>



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Salesforce Scheduler

Permission Sets

## 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"/>	Buyer	Allows access to the store. Lets users see products and...	B2B Buyer Permission Set One Seat
<input type="checkbox"/>	Buyer Manager	Includes all Buyer capabilities, and allows access to ma...	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/>	C360 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"/>	Del   Clone	Excellence Profile Manager	Salesforce
<input type="checkbox"/>	Facility Manager	Lets users create, read, edit, and delete locations, subloc...	Facility Manager

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 Other

1-25 of 31 0 Selected

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Permission Sets

## Permission Sets

managerbanksales

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

Full-screen Setup Video Tutorial | Help for this Page

### Permission Set Overview

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

### Apps

Assigned Apps  
Assigned Connected Apps  
Object Settings  
App Permissions  
Apex Class Access

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SETUP

Permission Set managerbanksales

Full-screen View Video Tutorial | Help for this Page

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

Permission Set Overview > Object Settings Accounts

Accounts Save Cancel

Object Permissions

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

Field Permissions

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

All Users

1 item selected

Search this list...

Full Name	Role	A...	Profile
Ishwarya	Ishwarya@gmail.com		System Administrator
Chatter Expert	Chatter	chatty:00d5j00000dq4hgeat.t3yyipn6v4mm@...	Chatter Free User
consumer 1	c1	cons143@gmail.com	Marketing Team
Integration User	integ	integration@00d5j00000dq4hgeat.com	Analytics Cloud Integration User
manager 1	m1	managerabcabc@gmail.com	Marketing Team
manager 2	m2	managerxyzxyz@gmail.com	Manager
manager bank	mbank	managerbank123@gmail.com	Marketing Team

Cancel Next

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Person Accounts

Salesforce Scheduler

Assignment Policies

Salesforce Scheduler

All Users

1 item selected

Search this list...

Full Name	Role	A...	Profile
Ishwarya	Ishwarya@gmail.com		System Administrator
Chatter Expert	Chatter	chatty:00d5j00000dq4hgeat.t3yyipn6v4mm@...	Chatter Free User
consumer 1	c1	cons143@gmail.com	Marketing Team
Integration User	integ	integration@00d5j00000dq4hgeat.com	Analytics Cloud Integration User
manager 1	m1	managerabcabc@gmail.com	Marketing Team
manager 2	m2	managerxyzxyz@gmail.com	Manager
manager bank	mbank	managerbank123@gmail.com	Marketing Team

Cancel Next

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Cloud My-app Recently Viewed College Department Details Management Customers Bank

Customers Recently Viewed ▾

0 items • Updated a few seconds ago

Total Life Time Value Name

Full-screen Sip

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

The screenshot shows the Salesforce Lightning Experience interface. At the top, there's a navigation bar with tabs like WhatsApp, Job Profile, Flows, Flow Builder, and Lightning Experience. Below that is a secondary navigation bar with categories like My-app, Recently Viewed, College, Department, Details, Management, Customers, and Bank. Under the Customers category, there's a sub-section titled 'Recently Viewed' with a dropdown arrow. It displays a message: '0 items • Updated a few seconds ago'. Below this, there's a search bar labeled 'Search this list...' and a set of icons for filtering and sorting. A large empty area below the search bar contains the message: 'You haven't viewed any Customers recently. Try switching list views.' There's also a 'Full-screen Sip' button at the bottom of this message area.