

NAAN MUDHALVAN

SALESFORCE PROJECT REPORT

COLLEGE: SCAD COLLEGE OF ENGINEERING & TECHNOLOGY

BATCH – 12

NAME	NM ID	REG NO
MOHAMED ANSAR.M	B09980D66F80A168D17405B5756D1EBC	952820114333
MOHAMED ABBAS ALHAJ.A	CADFA9E7FD7A710B7394B1A99F6B4897	952820114332
NAGOOR SYED KANI .T.M	D53E066807437C496C4491143CE3E51F	952820114342

BATCH – 12

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NAGOOR SYED KANI T.M	D53E066807437C496C4491143CE3E51F	952820114342

Step 1: Create a Salesforce Account

The screenshot shows a Salesforce Chatter profile for 'Nagoor Syed Kani'. The header includes the Salesforce logo, a search bar, and navigation tabs: Home, Chatter, People, Groups, Files, Reviews, and Job Postings. The profile banner features a stylized landscape with mountains and a hot air balloon. The profile picture is a cartoon cat. The bio reads: 'Share your awesomeness with the world. (Or at least with your colleagues on Chatter.)'. Below the bio are two links: 'Learn new skills on Trailhead, the fun way to learn Salesforce.' and 'Connect with fellow Trailblazers on the Trailblazer Community.' The 'Details' section contains fields for Name, Manager, Title, Company Name, Email, and Phone. The 'Related' section shows 'Groups (0)' and 'Files (0)'.

Salesforce Chatter Home Chatter People Groups Files Reviews Job Postings

Nagoor Syed Kani Edit User Detail

Share your awesomeness with the world.
(Or at least with your colleagues on Chatter.)

Learn new skills on Trailhead, the fun way to learn Salesforce.

Connect with fellow Trailblazers on the Trailblazer Community.

Details

Name	Manager
Nagoor Syed Kani	
Title	Company Name
	Scad college of engineering and technology
Email	Phone

Related

Groups (0)

Files (0)

Step 2 : Create the Objects(JOB POSTING SITE,REVIEWS,JOB POSTING)

The screenshot shows the Salesforce Setup page for creating a new object. The header includes the Salesforce logo, a search bar, and navigation tabs: Setup, Home, and Object Manager. The 'Object Manager' tab is selected, and the 'Review' section is active. The 'Details' section contains fields for Description, API Name, Review, and Custom. The 'Related' section shows 'Enable Reports' and 'Track Activities'.

Setup Home Object Manager

Review Edit Delete

Details

Description	
API Name	
Review	
Custom	

Enable Reports

Track Activities

Review

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

List View Button Layout

Restriction Rules

Details

Description

API Name
Review__c

Custom

✓ Singular Label
Reviewer

Plural Label
Reviews

Enable Reports
✓

Track Activities

Track Field History
✓

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

Edit Delete

Step 3 : Create junction objects(JOB POSTING)

Setup Home **Object Manager**

Job Posting

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Details

Description

API Name
Job Postings__c

Enable Reports
✓

Edit Delete

Step 3 : Create junction objects(JOB POSTING)

The screenshot shows the Salesforce Setup interface for the 'Job Posting' object. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar is present. The left sidebar lists various configuration options for the object, including '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', 'List View Button Layout', and 'Restriction Rules'. The main content area is titled 'Job Posting' and contains a 'Details' section. This section includes fields for 'API Name' (Job_Posting_c), 'Custom' (checked), 'Singular Label' (Job Posting), 'Plural Label' (Job Postings), 'Enable Reports' (checked), 'Track Activities' (checked), 'Track Field History' (checked), 'Deployment Status' (Deployed), 'Help Settings' (Standard salesforce.com Help Window), and buttons for 'Edit' and 'Delete'.

Setup > OBJECT MANAGER
Job Posting

Details [Edit] [Delete]

Description

API Name
Job_Posting_c

Custom ☒

Singular Label
Job Posting

Plural Label
Job Postings

Enable Reports ☒

Track Activities ☒

Track Field History ☒

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window


The screenshot shows the Salesforce Setup interface for the 'Custom Tabs' section. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar is present. The left sidebar lists various configuration options for the 'Custom Tabs' section, including 'User Interface', 'Rename Tabs and Labels', and 'Tabs'. The main content area is titled 'Custom Tabs' and contains a 'Help for this Page' link. The text explains that custom tabs can be used to extend Salesforce functionality or build new application functionality. It also mentions that custom 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.

Setup > **Custom Tabs**







Custom Tabs [Help for this Page]

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.



Search Setup



SetupHomeObject Manager

SETUP > OBJECT MANAGER

Job Posting

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

List View Button Layout

Restriction Rules

Details

Description

API Name
Job_Posting__c

Custom

✓

Single Label
Job Posting

Plural Label
Job Postings

Enable Reports

✓

Track Activities


Track Field History

✓







Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

EditDelete



Search Setup



SetupHomeObject Manager

Q TABS

User Interface

Rename Tabs and Labels

Tabs

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

SETUP

Tabs

Custom Tabs



Help for this Page

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

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

Custom Object Tabs

New What Is This?

Action	Label	Tab Style	Description
Edit Del	Job Postings	 Multiphone	
Edit Del	Reviews	 TV Web browser	

Web Tabs

New What Is This?

No Web Tabs have been defined.

Visualforce Tabs

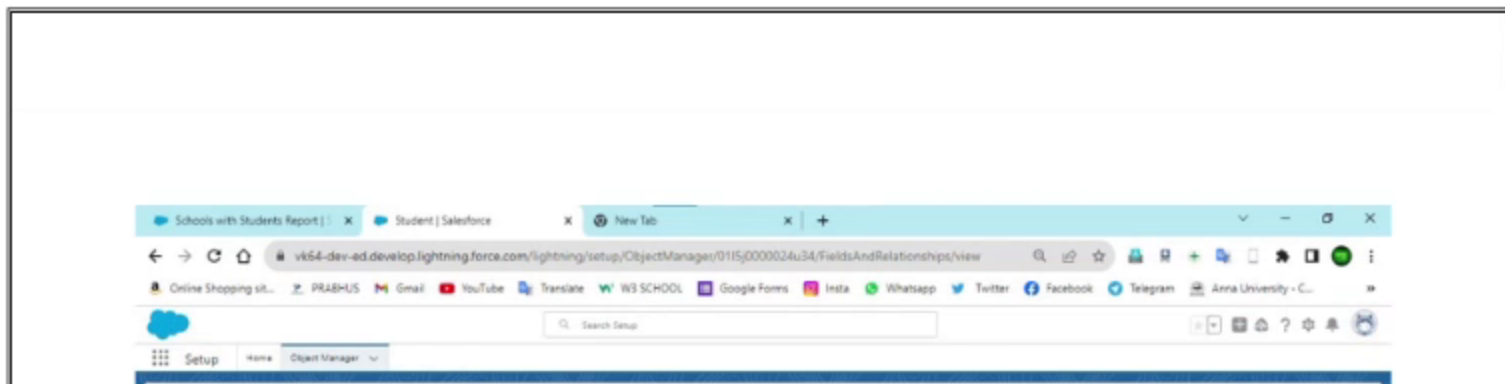
New What Is This?

No Visualforce Tabs have been defined.

Lightning Component Tabs

New What Is This?

Custom Tabs - Salesforce - Developer Edition



Schools with Students Report | Student | Salesforce | New Tab

vk64-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115/0000024u34/FieldsAndRelationships/view

Online Shopping sit... PRABHUS Gmail YouTube Translate W3 SCHOOL Google Forms Insta Whatsapp Twitter Facebook Telegram Anna University - C...

Search Setup

Setup Home Object Manager

Student

Details

Fields & Relationships

9 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Class	Class__c	Number(18, 0)		
Created By	CreatedBy__c	Lookup(User)		
E-Mail	E-Mail__c	Email		
Last Modified By	LastModifiedBy__c	Lookup(User)		
Marks	Marks__c	Number(18, 0)		
Phone Number	Phone_Number__c	Phone		
Results	Results__c	Percent		
School	School__c	Master-Detail(School)		✓
Student Name	Name	Text(30)		✓

27°C Mostly cloudy 9:26 AM 10/20/2023

Search Setup

Setup Home Object Manager

Student

Job Posting Site

Results	Results__c	Result		
List View Button Layout	School	School__c	Master-Detail(School)	✓
Restriction Rules	Student Name	Name	Text(30)	✓
Steering Rules				



SETUP - OBJECT MANAGER

Job Posting Site

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Links

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Fields & Relationships

5 Items, Sorted by Field Label

Quick Find

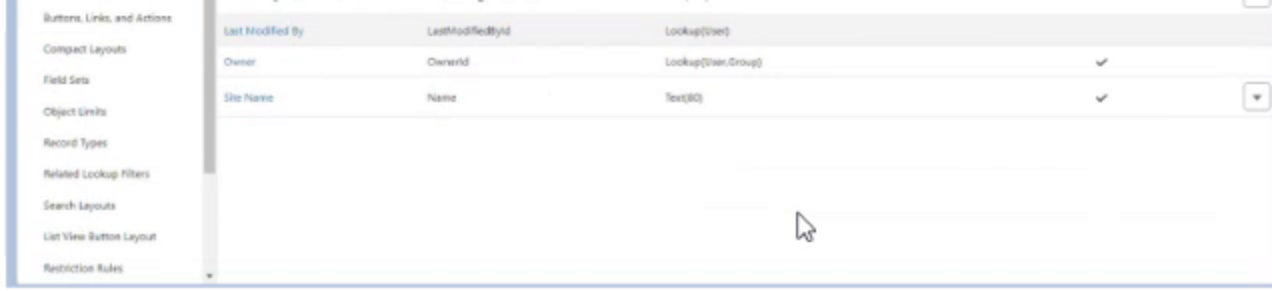
New

Deleted Fields

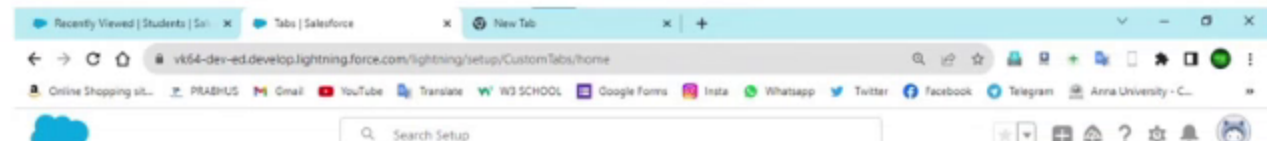
Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Job Posting Site URL	Job_Posting_Site_URL__c	URL(255)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Site Name	Name	Text(30)		✓



Step 4 : Create the Tabs for each object(JOB POSTING SITE,REVIEWS,JOB POSTING)



Step 4 : Create the Tabs for each object(JOB POSTING SITE,REVIEWS,JOB POSTING)

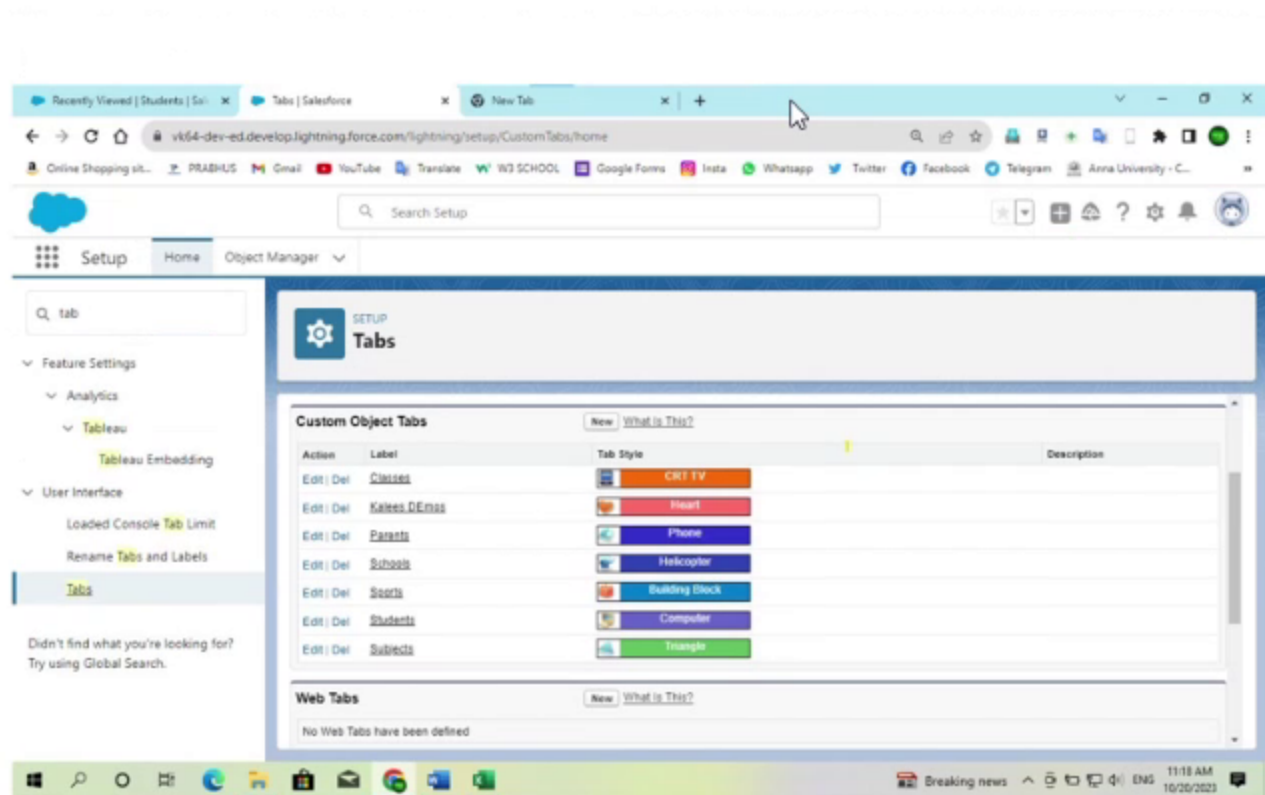
The screenshot shows the Salesforce Setup interface. On the left, the navigation menu is expanded to 'Setup', and 'Custom Object Tabs' is selected under the 'User Interface' section. The main content area displays the 'Custom Object Tabs' configuration page. It includes a table with columns for Action, Label, Tab Style, and Description. The table lists several tabs: 'Classes', 'Kalees Demos', 'Parents', 'Schools', 'Sports', 'Students', and 'Subjects'. Each tab has a corresponding icon and a color-coded label. Below the table, there is a section for 'Web Tabs' which currently shows 'No Web Tabs have been defined'.

Action	Label	Tab Style	Description
Edit Del	Classes	CRT TV	
Edit Del	Kalees Demos	Heart	
Edit Del	Parents	Phone	
Edit Del	Schools	Helicopter	
Edit Del	Sports	Building Clock	
Edit Del	Students	Computer	
Edit Del	Subjects	Triangle	

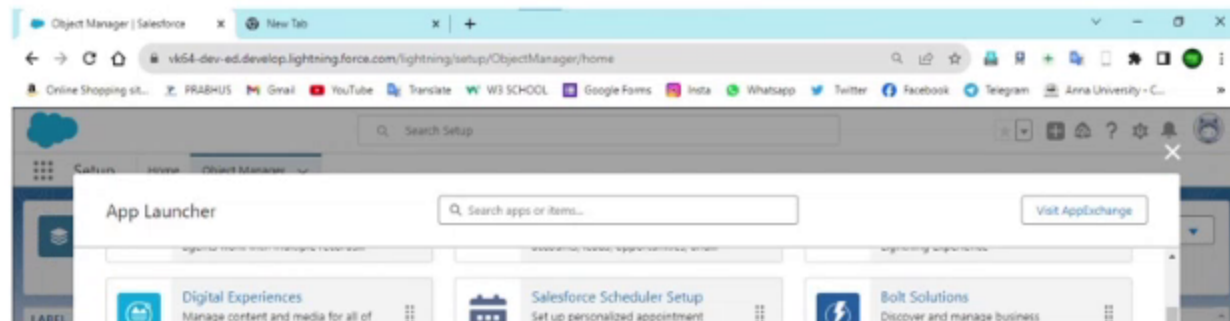
Step 5 : Create a Lightning App

The screenshot shows the Salesforce Object Manager page. The navigation menu is expanded to 'Object Manager', and 'Object Manager' is selected. The main content area displays the 'Object Manager' configuration page. It includes a table with columns for Action, Label, and Tab Style. The table lists several objects: 'Classes', 'Kalees Demos', 'Parents', 'Schools', 'Sports', 'Students', and 'Subjects'. Each object has a corresponding icon and a color-coded label. Below the table, there is a section for 'Web Tabs' which currently shows 'No Web Tabs have been defined'.

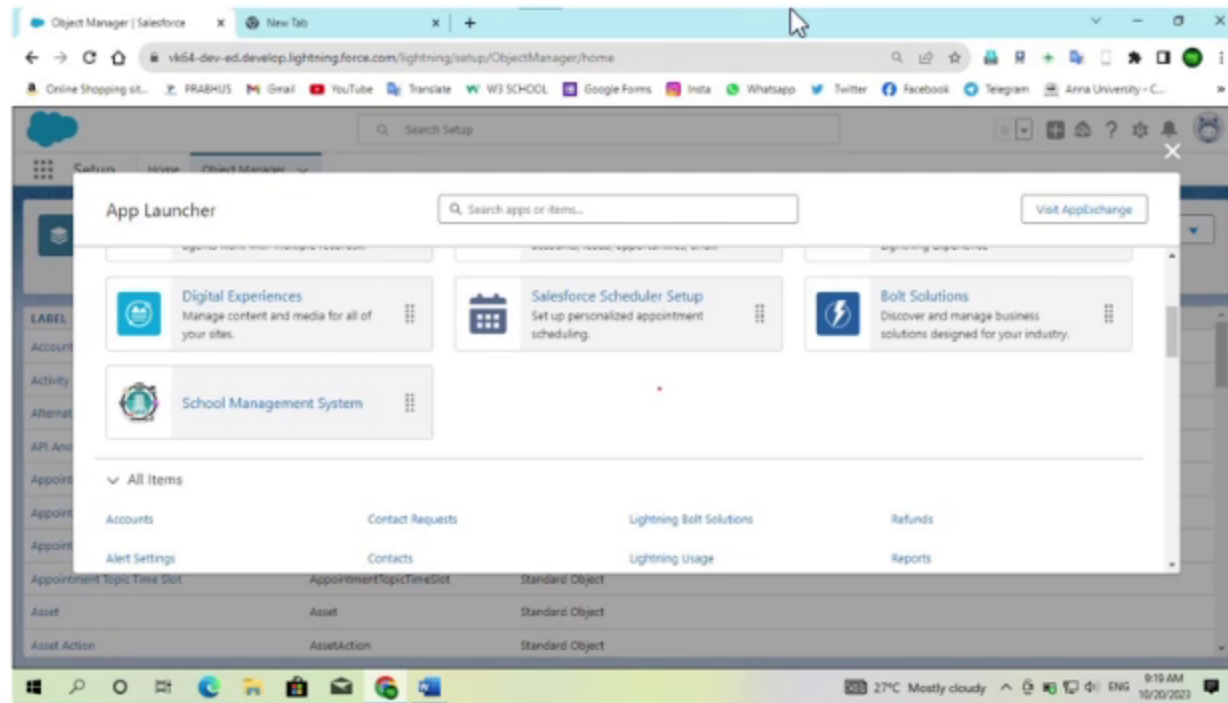
Step 4 : Create the Tabs for each object(JOB POSTING SITE,REVIEWS,JOB POSTING)



Step 5 : Create a Lightning App



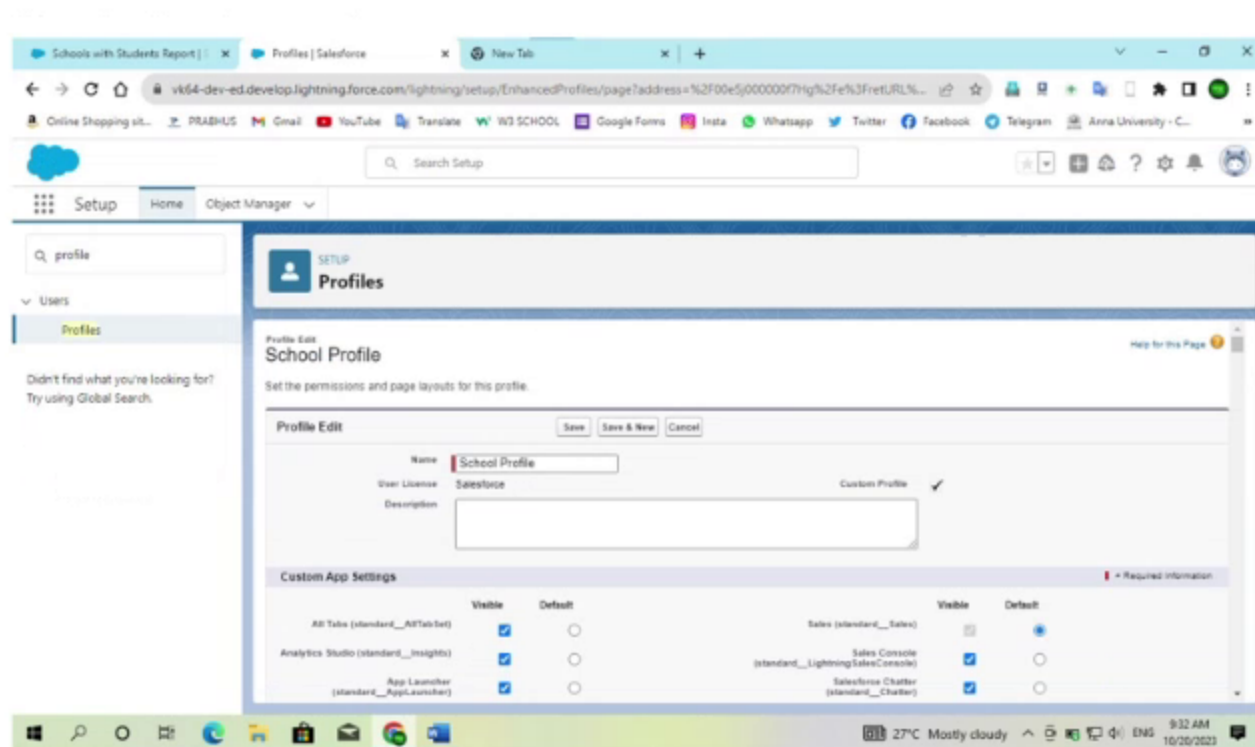
Step 5 : Create a Lightning App



Step 6 : Create the job vacant Profile



Step 6 : Create the job vacant Profile

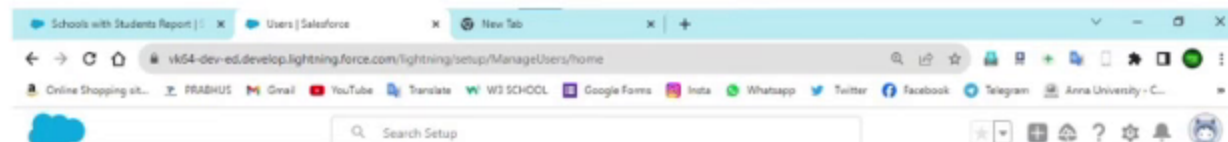


The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'profile' entered and a list of items including 'Users' and 'Profiles'. The main content area is titled 'SETUP Profiles' and 'Profile Edit School Profile'. It includes a 'Name' field with 'School Profile', a 'User License' dropdown set to 'Salesforce', and a 'Description' field. Below this is the 'Custom App Settings' section, which is a table with columns for 'Visible' and 'Default' for various apps. The table is divided into two sections: 'All Tabs' and 'Sales Console'. The 'All Tabs' section has three rows: 'All Tabs (standard__AllTabSet)', 'Analytics Studio (standard__Insights)', and 'App Launcher (standard__AppLauncher)'. The 'Sales Console' section has three rows: 'Sales (standard__Sales)', 'Sales Console (standard__LightningSalesConsole)', and 'Salesforce Chatter (standard__Chatter)'. The 'Visible' column for all items is checked, and the 'Default' column is empty. The bottom of the screen shows a Windows taskbar with the date and time as 9:32 AM on 10/20/2023.

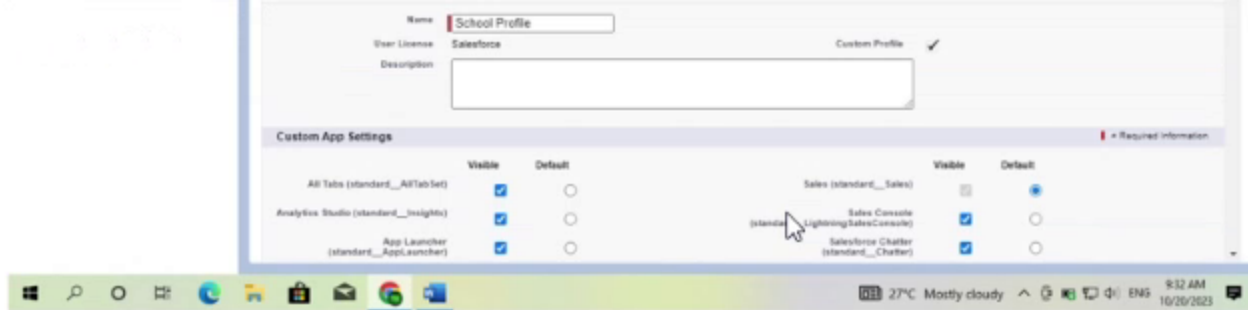
	Visible	Default
All Tabs (standard__AllTabSet)	<input checked="" type="checkbox"/>	<input type="radio"/>
Analytics Studio (standard__Insights)	<input checked="" type="checkbox"/>	<input type="radio"/>
App Launcher (standard__AppLauncher)	<input checked="" type="checkbox"/>	<input type="radio"/>

	Visible	Default
Sales (standard__Sales)	<input checked="" type="checkbox"/>	<input type="radio"/>
Sales Console (standard__LightningSalesConsole)	<input checked="" type="checkbox"/>	<input type="radio"/>
Salesforce Chatter (standard__Chatter)	<input checked="" type="checkbox"/>	<input type="radio"/>

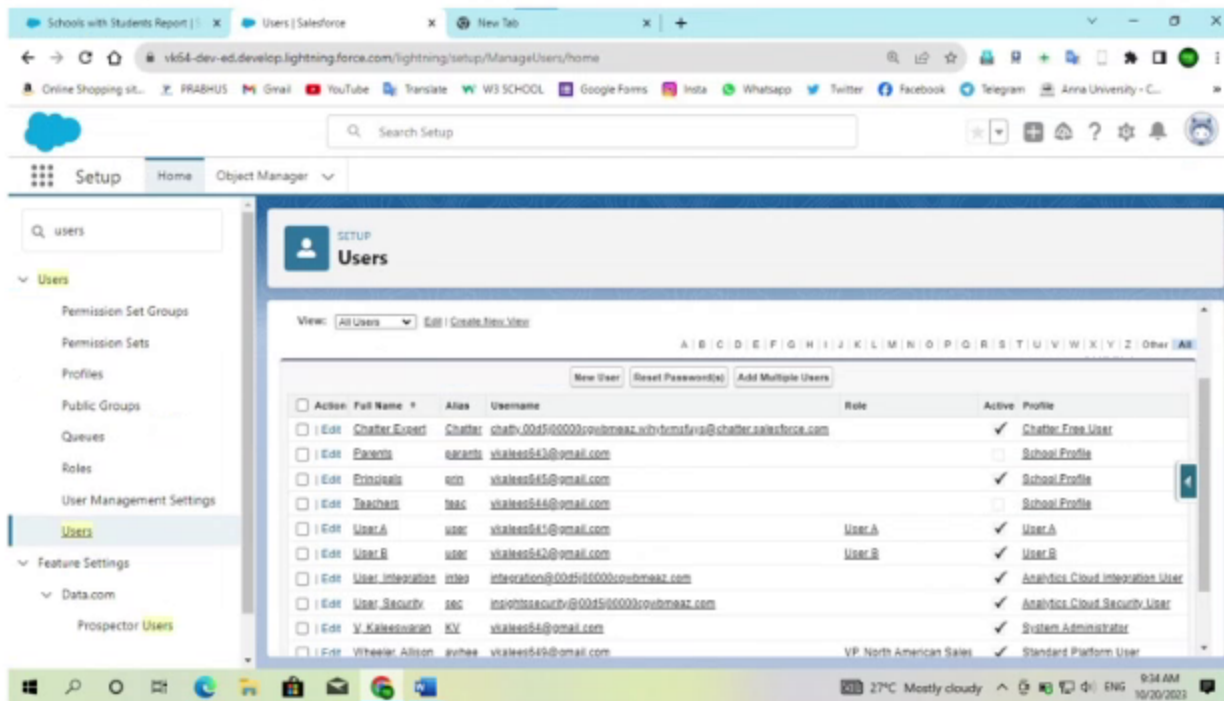
Step 7 : Create the User



The screenshot shows the Salesforce Setup interface with the 'Users' section selected in the left sidebar. The main content area is titled 'Manage Users/home'. The bottom of the screen shows a Windows taskbar with the date and time as 9:32 AM on 10/20/2023.



Step 7 : Create the User



Q users

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

View: All Users Edit Create New User

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

New User Reset Password(s) Add Multiple Users

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Euser	Chatter	chatter.0045f00003roubmeaz.vchrmefvq@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	Parents	parants	vkalees643@gmail.com		<input type="checkbox"/>	School Profile
<input type="checkbox"/> Edit	Principals	prin	vkalees645@gmail.com		<input checked="" type="checkbox"/>	School Profile
<input type="checkbox"/> Edit	Teachers	teac	vkalees644@gmail.com		<input type="checkbox"/>	School Profile
<input type="checkbox"/> Edit	User A	user	vkalees641@gmail.com	User A	<input checked="" type="checkbox"/>	User A
<input type="checkbox"/> Edit	User B	user	vkalees642@gmail.com	User B	<input checked="" type="checkbox"/>	User B
<input type="checkbox"/> Edit	User Integration	inteo	integration@0045f00003roubmeaz.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	info@ttsscourbr@0045f00003roubmeaz.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User
<input type="checkbox"/> Edit	V. Kaleswaran	KV	vkalees64@gmail.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	Wheeler, Allison	gwhee	vkalees649@gmail.com	VP, North American Sales	<input checked="" type="checkbox"/>	Standard Platform User

9:34 AM 10/20/2023

<input type="checkbox"/> Edit	Parents	parants	vkalees643@gmail.com	<input type="checkbox"/>	School Profile
<input type="checkbox"/> Edit	Principals	prin	vkalees645@gmail.com	<input checked="" type="checkbox"/>	School Profile
<input type="checkbox"/> Edit	Teachers	teac	vkalees644@gmail.com	<input type="checkbox"/>	School Profile

Step 8 : Create the Permission Set for the Users

Q permis

Setup Home Object Manager

Users

Permission Set Groups

Permission Sets

Permission Sets

Help for this Page

<input type="checkbox"/> Edit	Parents	parants	vkalees643@gmail.com	<input type="checkbox"/> School Profile
<input type="checkbox"/> Edit	Principals	prin	vkalees645@gmail.com	<input checked="" type="checkbox"/> School Profile
<input type="checkbox"/> Edit	Teachers	teac	vkalees644@gmail.com	<input type="checkbox"/> School Profile

Step 8 : Create the Permission Set for the Users

Setup Home Object Manager

Search Setup

permission

Users

Permission Set Groups

Permission Sets

Custom Code

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

Permission Sets

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

[All Permission Sets] Edit Delete Create New View

Action	Permission Set Label	Description	License
<input type="checkbox"/>	Standard Einstein Activity Capture	Access to Standard Einstein Activity Capture	Standard Einstein Activity Capture User
<input type="checkbox"/>	Stack Service User	Allows users run the flows for swarming with Service Cloud for Slack	Stack Service User
<input type="checkbox"/>	Staples	Allows access to B2C Commerce features.	Commerce User
<input type="checkbox"/>	Service Cloud User	Denotes that the user is a Service Cloud user.	Service User
<input type="checkbox"/>	Security Center Integration User	Access Security Center for integration	Cloud Integration User
<input type="checkbox"/>	Bea3 Indexing G2C User (Perm)	Allows the user to access entities indexed by Bea3 indexing pipeline.	Cloud Integration User
<input type="checkbox"/>	Salesforce Console User	Enable Salesforce Console User	Sales Console User
<input type="checkbox"/>	Salesforce Cloud Integration Admin	Gives the admin data access and the permissions to integrate Salesforce.	Cloud Integration User
<input type="checkbox"/>	Salesforce Apex User	Gives Apex Users access to analyze code for anti patterns.	Cloud Integration User
<input type="checkbox"/>	Sales Engagement Basic User	Access basic sales automation and email productivity features, includ	Sales Engagement Basic
<input type="checkbox"/>	Sales Cloud User	Denotes that the user is a Sales Cloud user.	Sales User
<input type="checkbox"/>	SCRT2 Integration User	Give SCRT2 Integration user necessary access	Cloud Integration User
<input type="checkbox"/>	Quiver Manager	Allows users create, read, edit, and delete quivered parties as well as res	Quiver Manager

1-25 of 30 0 Selected

Page 1 of 2

Online Shopping sit... PRABHUS Gmail YouTube Translate W3 SCHOOL Google Forms Insta Whatsapp Twitter Facebook Telegram Anna University - C...

Search Setup

Setup Home Object Manager

permission

Users

Permission Set Groups

Permission Sets

Custom Code

Custom Permissions

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

SETUP

Permission Sets

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

All Permission Sets Edit Delete Create New View

New

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

Action	Permission Set Label	Description	License
<input type="checkbox"/> Del Clone	Teacher Permission		

1-1 of 1 0 Selected

Page 1 of 1

27°C Mostly cloudy 9:38 AM 10/20/2023

Step 9 : Create field and relationship

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Review

Field & Relationship

Step 9 : Create field and relationship

Setup | Home | Object Manager

Search Setup

Setup - OBJECT MANAGER

Review

Details

Fields & Relationships

13 items, Sorted by Field Label

Quick Find

None Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Core	Core__c	Picklist		
Core Competencies comments	Core_Competencies_comments__c	Text Area(255)		
Created By	CreatedByM	Lookup(User)		
Experience	Experience__c	Picklist		
Experience Comments	Experience_Comments__c	Text Area(255)		
Interviewer	Interviewer__c	Lookup(Incident Related Item)		✓
Job Application	Job_Application__c	Master Detail(Job Posting Site)		✓
Last Modified By	LastModifiedByM	Lookup(User)		
Leadership Skills	Leadership_Skills__c	Picklist		

Step 10 : Create user adoption

Recently Viewed | Schools | Search

New Tab

vk64-dev-ed.develop.lightning.force.com/lightning/o/School__c/list?filterName=Recent

Online Shopping at... PRABHU'S Gmail YouTube Translate W3 SCHOOL Google Forms Insta Whatsapp Twitter Facebook Anna University - C...

Search...

School Management... Schools Students Parents Reports Dashboards

Compact Layouts	Created By	CreatedById	Lookup(User)	
Field Sets	Experience	Experience__c	Picklist	
Object Limits	Experience Comments	Experience_Comments__c	Text Area(255)	
Record Types	Interviewer	Interviewer__c	Lookup(Incident Related Item)	✓
Related Lookup Filters	Job Application	Job_Application__c	Master-Detail(Job Posting Site)	✓
Search Layouts	Last Modified By	LastModifiedById	Lookup(User)	
List View Button Layout	Leadership Skills	Leadership_Skills__c	Picklist	

Step 10 : Create user adoption

Recently Viewed | Schools | Search

vk54-dev-ed.develop.lightning.force.com/lightning/o/School__c/list?filterName=Recent

Online Shopping st... PRABHUS Gmail YouTube Translate W3 SCHOOL Google Forms Insta Whatsapp Twitter Facebook Telegram Anna University - C...

School Management... Schools Students Parents Reports Dashboards

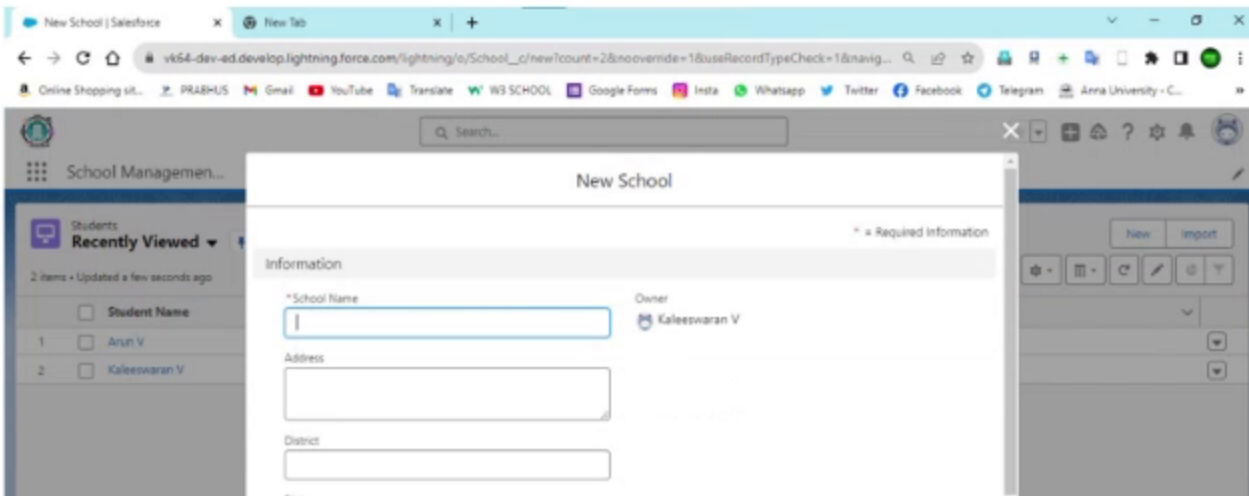
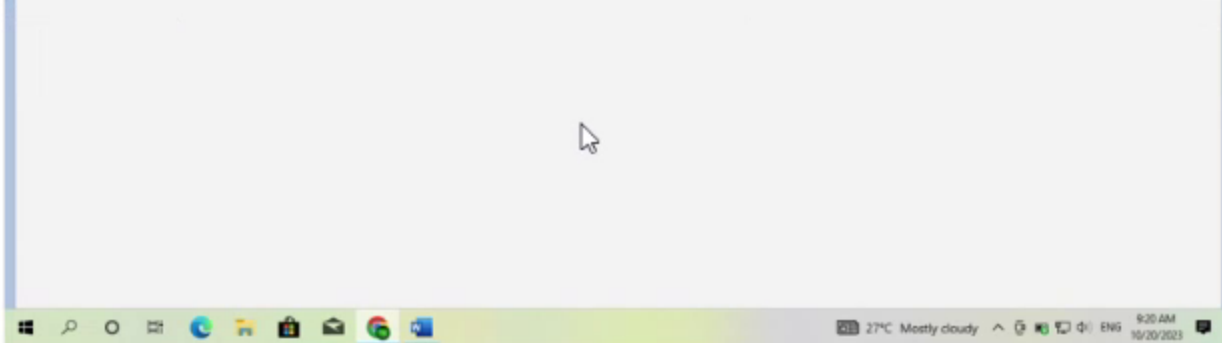
Schools Recently Viewed

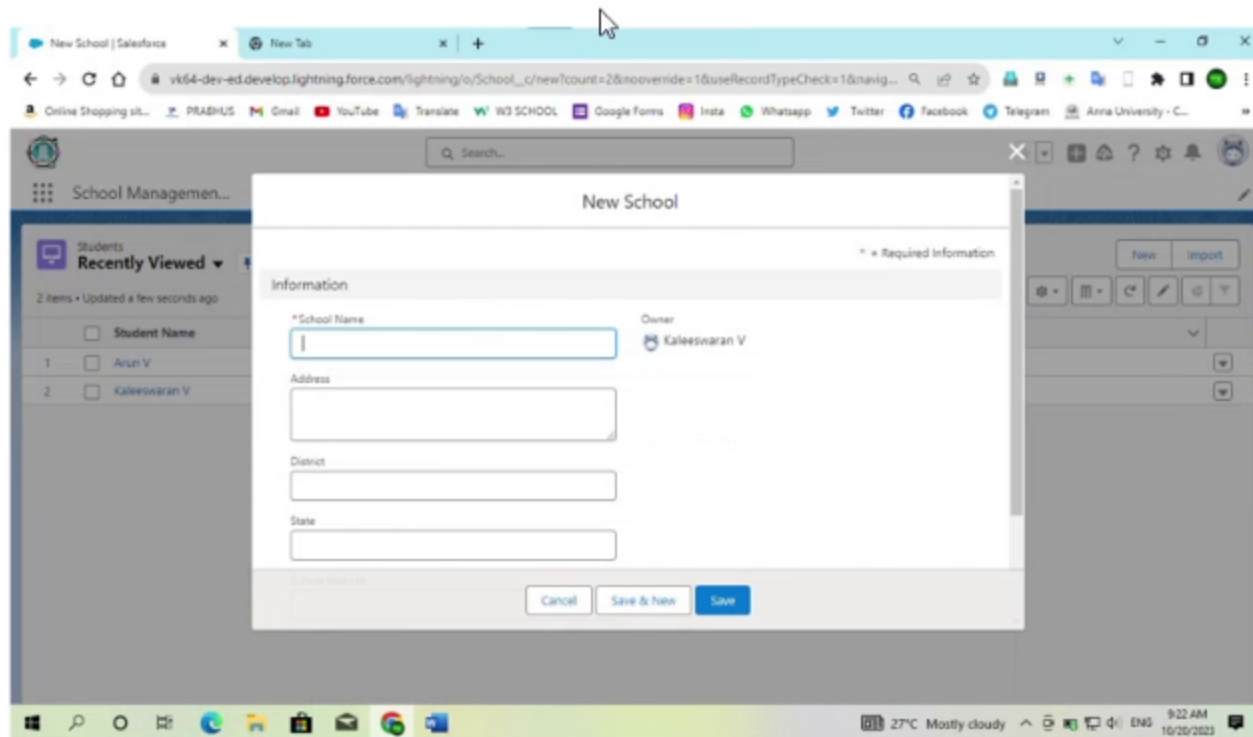
1 item • Updated a few seconds ago

Search this list...

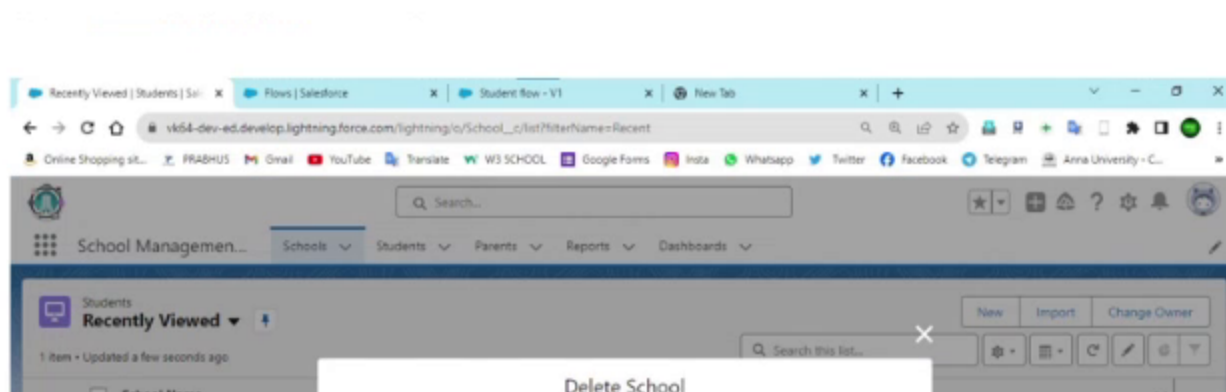
	School Name
1	R H N U S S AADITHANAR HIGHER SECONDARY SCHOOL

27°C Mostly cloudy 9:20 AM 10/20/2021

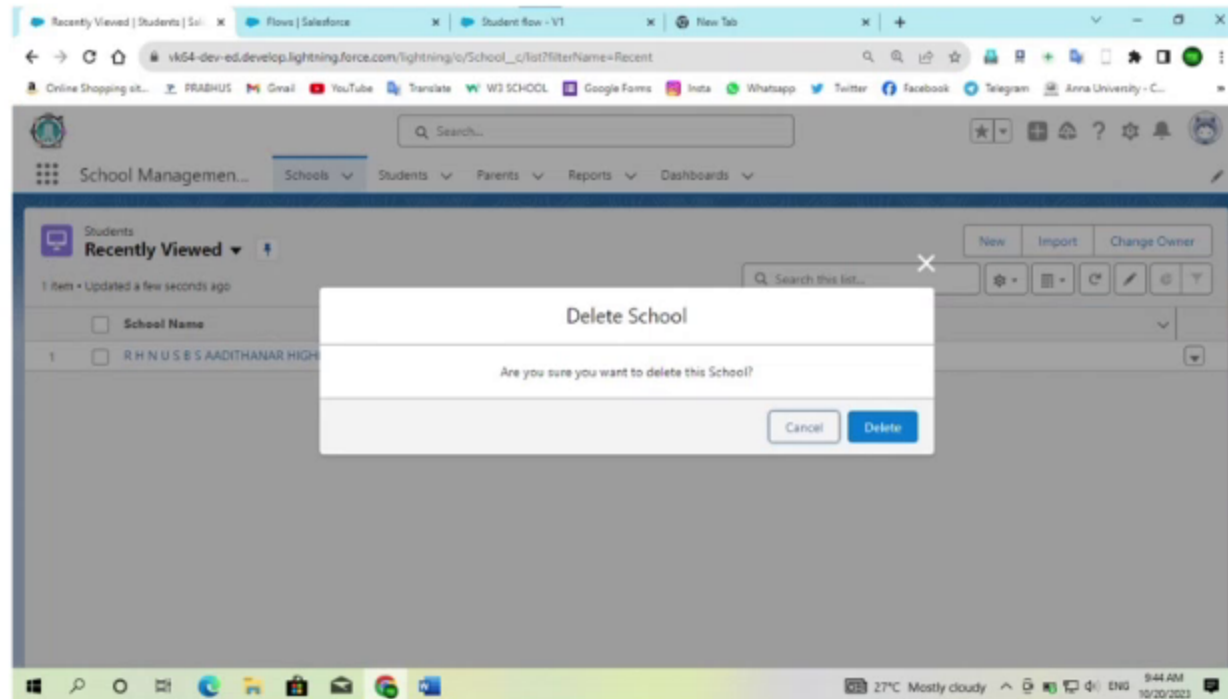




Step 11 : Delecting records



Step 11 : Deleting records





Step 12 : Create view report and dashboard

A screenshot of the Salesforce Setup interface. The left sidebar shows the navigation menu with 'Setup' selected. Under 'Feature Settings', 'Analytics' is expanded, and 'Reports & Dashboards' is selected. The main content area is titled 'Reports and Dashboards Settings' and 'Report and Dashboard User Interface Settings'. It contains several sections with checkboxes for enabling or disabling features. The 'User Interface' section includes options for floating report headers, dashboard finder, XLS export, inline editing, and changing dashboard owner. The 'Confidential Information Disclaimer Settings' section includes options to exclude disclaimers from report exports and print pages. The 'Chatter Options' section includes an option for dashboard component snapshots. The 'Unified Analytics Home' section includes options for showing preview thumbnails and enabling the unified experience.

Search Setup

Setup Home Object Manager

Q dashboard

Feature Settings

Analytics

Reports & Dashboards

Access Policies

Historical Trending

Report Types

Reporting Snapshots

Reports and Dashboards Settings

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

SETUP Reports and Dashboards Settings

Report and Dashboard User Interface Settings

Modify the behavior of the user interface for report and dashboard pages using the following settings:

User Interface

- ☒ Enable Floating Report Headers (Salesforce Classic only)
- ☒ Enable Dashboard Finder [x](#)
- ☐ Hides the option to export a report in XLS format in Lightning Experience
- ☒ Enable Inline Editing in Reports (Lightning Experience Only)
- ☐ Allow users to change dashboard owner (Lightning Experience Only)

Confidential Information Disclaimer Settings

Specify whether or not to exclude a disclaimer that says "Confidential Information - Do Not Distribute" from report outputs.

- ☐ Exclude Disclaimer from Formatted Report Exports in Lightning Experience
- ☐ Exclude Disclaimer from Report Run Pages and from Printable View Pages (Salesforce Classic Only)

Chatter Options

- ☐ Enable Dashboard Component Snapshots [x](#)

Unified Analytics Home

- ☒ Show preview thumbnails for Lightning reports and dashboards [x](#)
- ☒ Enable the Unified Experience for Analytics Home [x](#)

Setup Home Object Manager

Search Setup

dashboards

Feature Settings

Analytics

Reports & Dashboards

Access Policies

Historical Trending

Report Types

Reporting Snapshots

Reports and Dashboards Settings

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

Reports and Dashboards Settings

Report and Dashboard User Interface Settings

Modify the behavior of the user interface for report and dashboard pages using the following settings.

User Interface

- ☒ Enable Floating Report Headers (Salesforce Classic only)
- ☒ Enable Dashboard Finder
- ☐ Hide the option to export a report in XLS format in Lightning Experience
- ☒ Enable Inline Editing in Reports (Lightning Experience Only)
- ☐ Allow users to change dashboard owner (Lightning Experience Only)

Confidential Information Disclaimer Settings

Specify whether or not to exclude a disclaimer that says "Confidential Information - Do Not Distribute" from report footers.

- ☐ Exclude Disclaimer from Formatted Report Exports in Lightning Experience
- ☐ Exclude Disclaimer from Report Run Pages and from Printable View Pages (Salesforce Classic Only)

Chatter Options

- ☐ Enable Dashboard Component Snapshots

Unified Analytics Home

- ☒ Show preview thumbnails for Lightning reports and dashboards
- ☒ Enable the Unified Experience for Analytics Home

Schools with Students Rep... Developer Console Flows | Salesforce Student flow - V1 New Tab

vk64-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSPage

Online Shopping sit... PRABHUS Gmail YouTube Translate W3 SCHOOL Google Forms Insta Whatsapp Twitter Facebook Telegram Anna University - C...

File Edit Debug Test Workspace Help

Open

Entity Type	Entities	Related
Entity Type	Name Namespace	Name Extent Direction
Classes	CloseOpportunityTing...	← Subject__c SOBJECT References
Triggers	AccountAddressTrigger	
Pages	Internalmarkets	
Page Components	RestrictContactByName	
Objects		
Static Resources		
Packages		

Open Filter: Filter the repository (" = any string) Hide Managed Packages Refresh

Logs Tests Checkpoints Query Editor

User Application

Kalneswaran V Browser /aura 18/11/2023, 9:13:19 PM Success Unread 276 bytes



Schools with Students Rep... | Developer Console | Flows | Salesforce | Student flow - V1 | New Tab

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File | Edit | Debug | Test | Workspace | Help

Open

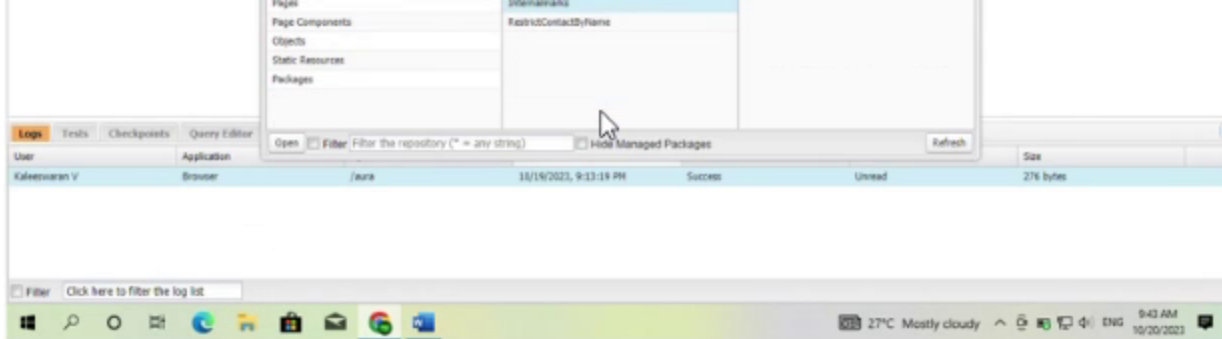
Entity Type	Entity Name	Namespace	Isolated
Entity Type	Name	Namespace	Name Extent Direction
Classes	ClosedOpportunityLog		Subject__c SOBJECT References
Triggers	AccountAddressTrigger		
Pages	Information		
Page Components	RestrictContactFullName		
Objects			
Static Resources			
Packages			

Open ☐ Filter the repository (* = any string) ☐ Hide Managed Packages Refresh

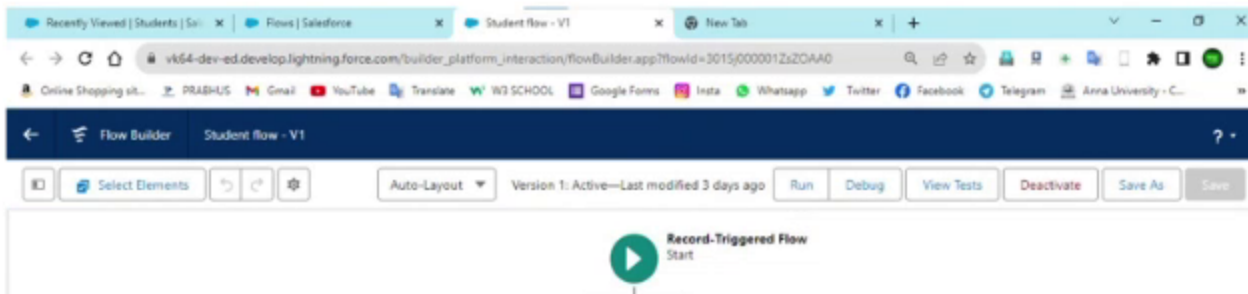
User	Application					Size
Kaleeswaran V	Browser	/aura	15/10/2023, 9:13:18 PM	Success	Unread	276 bytes

Filter Click here to filter the log list

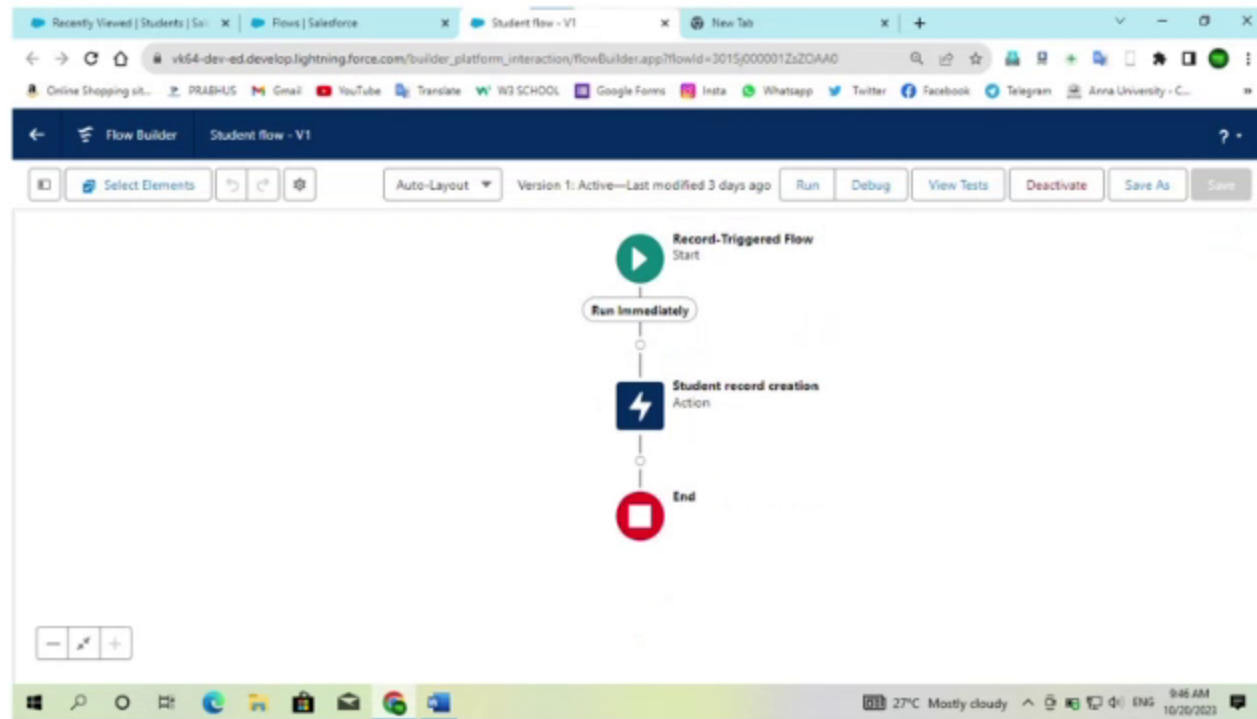
27°C Mostly cloudy 9:43 AM 10/10/2023



Step 13 : Create A flow



Step 13 : Create A flow



Step 14 : Create Reports DML Operation And Batchable

The screenshot shows the Salesforce Setup page, specifically the 'Reports and Dashboards Settings' section. The left sidebar contains a navigation menu with 'Setup', 'Home', and 'Object Manager'. The main content area is titled 'Reports and Dashboards Settings' and includes a sub-section for 'Report and Dashboard User Interface Settings'. This section allows users to modify the behavior of the user interface for report and dashboard pages. The 'User Interface' settings are listed below:

- ☒ Enable Floating Report headers (Salesforce Classic only)
- ☒ Enable Dashboard Finder

A note at the bottom states: 'The behavior of the user interface for report and dashboard pages using the following settings:'. The page also includes a search bar at the top and a 'Help for this Page' link.

Q dashboard

Feature Settings

Analytics

Reports & Dashboards

Access Policies

Historical Trending

Report Types

Reporting Snapshots

Reports and Dashboards Settings

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

SETUP

Reports and Dashboards Settings

Report and Dashboard User Interface Settings

Help for this Page

Modify the behavior of the user interface for report and dashboard pages using the following settings:

User Interface

☒ Enable Floating Report Headers (Salesforce Classic only)

☒ Enable Dashboard Finder

☐ Hide the option to export a report in XLS format in Lightning Experience

☒ Enable Inline Editing in Reports (Lightning Experience Only)

☐ Allow users to change dashboard owner (Lightning Experience Only)

Confidential Information Disclaimer Settings

Specify whether or not to exclude a disclaimer that says "Confidential Information - Do Not Distribute" from report folders.

☐ Exclude Disclaimer from Formatted Report Exports in Lightning Experience

☐ Exclude Disclaimer from Report Run Pages and from Printable View Pages (Salesforce Classic Only)

Chatter Options

☐ Enable Dashboard Component Snapshots

Unified Analytics Home

☒ Show preview thumbnails for Lightning reports and dashboards

☒ Enable the Unified Experience for Analytics Home

