

Naan Mudhalvan

Salesforce Developer (Course)

Assignment

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Year and Dept: 4th year and CSE

Batch: 2024

Zone.no: Zone 8

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

Salesforce screenshot showing the 'New Custom Object' setup page for creating a custom object named 'College'.

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:	<input type="checkbox"/>		

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

Object Name:	College	Example:	Account
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Description:

Context-Sensitive Help Setting:

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

Content Name:

Enter Record Name Label and Format

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

Record Name:	College Name	Example:	Account Name
--------------	--------------	----------	--------------

Save | Save & New | Cancel

Salesforce screenshot showing the 'New Custom Object' setup page for creating a custom object named 'Department'.

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:	<input type="checkbox"/>		

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

Object Name:	Department	Example:	Account
--------------	------------	----------	---------

Description:

Context-Sensitive Help Setting:

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

Content Name:

Enter Record Name Label and Format

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

Record Name:	Department Name	Example:	Account Name
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Save | Save & New | Cancel

Object Manager | Salesforce

Setup Home Object Manager

Object Manager

Edit Relationship: College

Step 4: Add custom related lists Step 4 of 4

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: Courses

Previous Save & New Save Cancel

2039

This screenshot shows the 'Object Manager' setup page in Salesforce. A new custom related list is being created for the 'College' object. The list is titled 'Courses'. It is defined as a Master-Detail relationship with the 'Department' field. The 'Field Label' is set to 'Department'. The 'Data Type' is 'Master-Detail'. The 'Field Name' is 'Department'. There is a text input field for 'Description' which is currently empty. Below this, there is a note asking to specify the title for the related list in all layouts. The 'Related List Label' is set to 'Courses'. At the bottom, there are buttons for 'Previous', 'Save & New', 'Save', and 'Cancel'.

Job Profile Recently Viewed | our_outlook Tabs | Salesforce

Gmail YouTube Maps Global NetAcad ... Edubee Interactive...

Setup Home Object Manager

Q tabs

User Interface Rename Tabs and Labels

Tabs

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

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.

New What Is This?

Action	Label	Tab Style	Description
Edit Del	Courses	Building Block	
Edit Del	Commitments	Copy card	
Edit Del	Executives	Diamond	
Edit Del	Excessive products	Lightning	
Edit Del	Invoices	ODD/EVD	
Edit Del	our customers	Rule	
Edit Del	Processes	Appliance	
Edit Del	retailers	Highway Sign	
Edit Del	Skinner products	Smart	
Edit Del	Students	Thought	

New What Is This?

22:21

This screenshot shows the 'Tabs' setup page in Salesforce. It displays a table of custom tabs. The table has columns for 'Action', 'Label', 'Tab Style', and 'Description'. The 'Action' column contains 'Edit | Del' links. The 'Label' column lists various objects: 'Courses', 'Commitments', 'Executives', 'Excessive products', 'Invoices', 'our customers', 'Processes', 'retailers', 'Skinner products', and 'Students'. The 'Tab Style' column shows icons for each tab style: Building Block, Copy card, Diamond, Lightning, ODD/EVD, Rule, Appliance, Highway Sign, Smart, and Thought. The 'Description' column is empty for all rows. Below the table, there are 'New' and 'What Is This?' buttons.

Screenshot of the Salesforce Setup interface showing the 'Department' object details. The 'Fields & Relationships' tab is selected. A large table lists various field types with their descriptions:

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 pop-up calendar.
DateTime	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, the 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.
Person	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 (Long)	Allows users to enter up to 255 characters on separate lines.
Text Area (Rich)	Allows users to enter up to 131,072 characters on separate lines.
Text (Encrypted)	Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.
Time	Allows users to enter a local time. For example, '2:40 PM', '14:40', '24:40:00', 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 include 'Next' and 'Cancel'.

Screenshot of the Salesforce Setup interface showing the 'New Custom Field' creation process for the 'Department' object. Step 2: Enter the details.

Form fields:

- Field Label: Dept_email
- Field Name: Dept_email
- Description: (empty)
- Help Text: (empty)
- 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 Format Editor

Help text for Default Value:

Use formula editor. Enter one or picklist value or formula or double quotes ("PICKLIST"), include colon and backslash quotes ("\"), or enter a decimal (1.00) and express data values using the standard format (Double). To reference a field from a Custom Metadata-type record use @CustomMetadataType__Name__Field__c

Buttons at the top right: Help for this Page, Previous, Next, Cancel.

Screenshot of the Salesforce Setup interface showing the 'Fields & Relationships' section for the 'Department' object.

The left sidebar lists various configuration options:

- 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

The main content area displays a list of field types with their descriptions:

- Currency: Allows users to enter a dollar or other currency amount and automatically formats the field in 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.
- DateTime: 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 DateTime field.
- Email: Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
- Geolocation: Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
- Number: Allows users to enter any number. Leading zeros are removed.
- Percent: Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.
- Phone: Allows users to enter any phone number. Automatically formats it as a phone number.
- Picklist: Allows users to select a value from a list you define.
- Picklist (Multi-Select): Allows users to select multiple values from a list you define.
- Text: Allows users to enter 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 URLs will open in a separate browser window.

Buttons at the bottom right include 'Next' and 'Cancel'.

Screenshot of the Salesforce Setup interface showing the 'New Custom Field' step for the 'Department' object.

The left sidebar lists various configuration options:

- 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

The main content area shows 'Step 2: Enter the details' for a new custom field named 'Dept_No.' with the following settings:

- Field Label:** Dept_No.
- Field Name:** Dept_No.
- Description:** (empty)
- Help Text:** (empty)
- 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
User-defined prefixes: Enter the first and partial value API names in double quotes ("field_name"). Include numbers without quotes. (10) Show percentages as decimal (0.10), and express date calculations in the standard format (Today() + 7). To reference a field from a Custom Metadata Type record use @CustomMetadataType__Name__c@{CustomMetadataField__c}

Buttons at the bottom right include 'Previous', 'Next', and 'Cancel'.

WhatsApp Job Profile Recently Viewed | our_cust... Department | Salesforce

Cell YouTube Maps Global NetAcad... Editive Interactive...

Setup Home Object Manager

SETUP > OBJECT MANAGER Department

Details Fields & Relationships

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_Nw__c	Phone		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User/Group)		✓
Total_Count	Total_Count__c	Roll-Up Summary (COUNT College)		

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

17.JPG Department | Salesforce Linux aryn1

Setup Home Object Manager

SETUP > OBJECT MANAGER Department

Details Fields & Relationships

Fields & Relationships

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

Data Type

None Selected Select one of the data types below.

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

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

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

Lookup Relationship Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a pop-up 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.

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

Setup Home Object Manager

Department

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Department New Relationship

Step 6 of 6

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

Previous Save & New Save Cancel

Setup Home Object Manager

College

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

None Selected

Auto Number

Formula

Roll-Up Summary

Lookup Relationship

Master-Detail Relationship

External Lookup Relationship

Checkbox

Currency

Select one of the data types below.

A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record. The other object is the source of the values in the list.

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 pop-up 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 pop-up 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 pop-up calendar.

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 of 5

Step 2: Enter the details

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

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: Note

Filter Criteria:

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

Previous Next Cancel

Setup Home Object Manager

SETUP > OBJECT MANAGER
College

Fields & Relationships		Fields & Relationships				
		FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Fields & Relationships	Page Layouts	College Name	Name	Text(80)		<input checked="" type="checkbox"/>
	Lightning Record Pages	Created By	CreatedBy	Lookup(User)		<input checked="" type="checkbox"/>
	Buttons, Links, and Actions	Last Modified By	LastModifiedBy	Lookup(User)		<input checked="" type="checkbox"/>
	Compact Layouts	Owner	OwnerId	Lookup(User/Group)		<input checked="" type="checkbox"/>
	Field Sets	Total Count	Total_Count__c	Roll-Up Summary (COUNT Department)		<input checked="" type="checkbox"/>
Object Limits						
Record Types						
Related Lookup Filters						
Search Layouts						

Setup Home Object Manager

SETUP Lightning Experience App Manager

New Lightning App New Connected App

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

App Name ↑	Developer Name	Description	Last Modified Date	App T...	Visib...
All Tabs	AllTabSet	Bold CRM Analytics dashboards and apps	01/10/2023, 6:39 am	Classic	<input checked="" type="checkbox"/>
Analytics Studio	Insights	Bold CRM Analytics dashboards and apps	01/10/2023, 6:39 am	Classic	<input checked="" type="checkbox"/>
App Launcher	AppLauncher	App Launcher tabs	01/10/2023, 6:39 am	Classic	<input checked="" type="checkbox"/>
Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	01/10/2023, 6:42 am	Lightning	<input checked="" type="checkbox"/>
Community	Community	Salesforce CRM Communities	01/10/2023, 6:39 am	Classic	<input checked="" type="checkbox"/>
Content	Content	Salesforce CRM Content	01/10/2023, 6:39 am	Classic	<input checked="" type="checkbox"/>
Cosmetic store management	Cosmetic_store		17/10/2023, 11:50 am	Lightning	<input checked="" type="checkbox"/>
Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	01/10/2023, 6:39 am	Lightning	<input checked="" type="checkbox"/>
Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	01/10/2023, 6:39 am	Lightning	<input checked="" type="checkbox"/>
Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	01/10/2023, 6:39 am	Lightning	<input checked="" type="checkbox"/>
Marketing	Marketing	Best-in-class on-demand marketing automation	01/10/2023, 6:39 am	Classic	<input checked="" type="checkbox"/>
Platform	Platform	The fundamental Lightning Platform	01/10/2023, 6:39 am	Classic	<input checked="" type="checkbox"/>
Queue Management	QueueManagement	Create and manage queues for your business.	01/10/2023, 6:39 am	Lightning	<input checked="" type="checkbox"/>
Sales	Sales	The world's most popular sales force automation (SFA) solution.	01/10/2023, 6:39 am	Classic	<input checked="" type="checkbox"/>
Sales	LicensedSales	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 Branding
*App Name <small>(Required)</small> <input type="text" value="Name your app..."/>	Image <small>(Required)</small> <input type="file"/> <input type="button" value="Upload"/> Primary Color Hex Value <input type="color" value="#007002"/> #007002
*Developer Name <small>(Required)</small> <input type="text" value="Enter a developer name..."/>	Org Theme Options: <input type="checkbox"/> Use the app's image and color instead of the org's custom theme
Description <small>(Optional)</small> <input type="text" value="Enter a description..."/>	

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 Branding
*App Name <small>(Required)</small> <input type="text" value="My_College"/>	Image <small>(Required)</small> <input type="file"/> <input type="button" value="Upload"/> Primary Color Hex Value <input type="color" value="#007002"/> #007002
*Developer Name <small>(Required)</small> <input type="text" value="My_College"/>	Org Theme Options: <input type="checkbox"/> Use the app's image and color instead of the org's custom theme
Description <small>(Optional)</small> <input type="text" value="Enter a description..."/>	

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

* Navigation Style
 Standard navigation
 Console navigation

* Supported Form Factors
 Desktop and phone
 Desktop
 Phone

Setup and Personalization

Setup Experience
 Setup (full set of Setup options)
 Service Setup

App Personalization Settings
 Disable end user personalization of nav items in this app
 Disable temporary tabs for items outside of this app

Back Next

ID	Name	Type	Description	Created Date	Status	Icon	Action
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

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	Type	Description	Created Date	Status	Icon	Action
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

*App Name: My_App

*Developer Name: My_App

Description: Enter a description...

App Branding

Image: Upload

Primary Color Hex Value: #007002

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

App Launcher Preview

My My_App

Next

Available Profiles

Selected Profiles

System Administrator

Save & Finish

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

Selected Profiles

System Administrator

Save & Finish

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 ✓

Recently Viewed ▾

0 items • Updated a few seconds ago

college Name

New college

* = Required Information

Information

* college Name: AVS Engineering college

Owner: SATHISH KUMAR S

Cancel Save & New Save

Service Home Chatter Accounts Cases Reports Dashboards colleges departments Details Providers Consumers Managements

Search...

college AVS Engineering college

New Contact Edit New Opportunity

Related Details

college Name: AVS Engineering college

Owner: SATHISH KUMAR S

Total_count: 0

Created By: SATHISH KUMAR S - 28/10/2023, 6:37 pm

Last Modified By: SATHISH KUMAR S - 28/10/2023, 6:37 pm

departments
Recently Viewed ▾

0 Items • Updated a few seconds ago:

department Name
CSE

New department

* Required Information

Information

* department Name: CSE

* college: AVS Engineering college

Cancel Save & New Save

Service Home Chatter Accounts Contacts Cases Reports Dashboards colleges departments Details Providers Consumers Managements

college AVS Engineering college

New Contact Edit New Opportunity

Related Details

college Name: AVS Engineering college	Owner: SATHISH KUMAR S
Total_count: 1	
Created By: SATHISH KUMAR S, 28/10/2023, 6:37 pm	Last Modified By: SATHISH KUMAR S, 28/10/2023, 6:37 pm

2. If there is 2 user, User A and User B in the organisation and we want in Account object that User A should not see the User B Record and user B should not see User A record then apply the Security for the users.

WhatsApp Job Profile New Custom Object Lightning Experience | Sales

Setup Home Object Manager

SETUP New Custom Object

New Custom Object

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

Custom Object Definition Edit

Custom Object Information

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

Label: **Example:** Account Required Information

Plural Label: **Example:** Accounts

Starts with visual sound:

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

Object Name: **Example:** Account

Description:

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

Content Name:

Enter Record Name Label and Format

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

WhatsApp Job Profile Details | Salesforce Lightning Experience | Sales

Setup Home Object Manager

SETUP > OBJECT MANAGER Details

Details

Fields & Relationships	Details	Edit Delete
Page Layouts	Description	
Lightning Record Pages		
Buttons, Links, and Actions		
Compact Layouts		
Field Sets	API Name: <input type="text" value="Details__c"/>	Enable Reports
Object Limits	Custom: <input checked="" type="checkbox"/>	Track Activities
Record Types	Singular Label: <input type="text" value="Details"/>	Track Field History
Related Lookup Filters	Plural Label: <input type="text" value="Details"/>	Deployment Status: <input type="text" value="Deployed"/>
Restriction Rules		Help Settings: <input type="text" value="Standard Salesforce.com Help Window"/>
Scoping Rules		
Triggers		
Flow Triggers		

2.JPG

Screenshot of the Salesforce Setup interface showing the Object Manager - Details page.

The left sidebar shows navigation links: Setup, Home, Object Manager, 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 content area is titled "Fields & Relationships" and displays four items sorted by Field Label:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Details Name	Name	Text(10)		✓
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓

Buttons at the top right include Quick Find, New, Deleted Fields, Field Dependencies, and Set History Tracking.

Screenshot of the Salesforce Setup interface showing the Object Manager - Details page.

The left sidebar shows navigation links: Setup, Home, Object Manager, 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 content area is titled "Fields & Relationships" and displays a list of relationship types:

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

Below the list, detailed descriptions and allowed values for each field type are provided:

- Checkbox: Allows users to select a True (checked) or False (unchecked) value.
- Currency: Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
- Date: Allows users to enter a date or pick a date from a popup calendar.
- DateTime: Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the DateTime field.
- Email: Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
- Geolocation: Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
- Number: Allows users to enter any number. Leading zeros are removed.
- Percent: Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.
- Phone: Allows users to enter any phone number. Automatically formats it as a phone number.
- Picklist: Allows users to select a value from a list you define.
- Picklist (Multi-Select): Allows users to select multiple values from a list you define.
- Text: Allows users to enter any combination of letters and numbers.

Salesforce Setup - Job Profile - Details | Salesforce - Lightning Experience | Sales - +

WhatsApp Job Profile Details | Salesforce Lightning Experience | Sales

Cell YouTube Maps Global NetAcad ... Edit Mode Interactive...

Setup Home Object Manager

SETUP > OBJECT MANAGER Details

Details New Custom Field Step 2 of 4

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

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.

Show Formula Editor

Default Value:

Step 2 of 4

Previous Next Cancel

Details | Salesforce - Google Drive arvind NIM assignment

Salesforce Setup - Job Profile - Details | Salesforce - Lightning Experience | Sales - +

WhatsApp Job Profile Details | Salesforce Lightning Experience | Sales

Gmail YouTube Maps Global NetAcad ... Edit Mode Interactive...

Setup Home Object Manager

SETUP > OBJECT MANAGER Details

Details New Custom Field Step 4 of 4

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

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

Details | Salesforce - Google Drive arvind NIM assignment

WhatsApp Job Profile Details Lightning Experience | Sale... +

Setup Home Object Manager Search Setup

SETUP > OBJECT MANAGER Details

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

Allows users to enter a dollar or other currency amount and automatically formats the field in 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 DateTime field.

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

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

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

Allows users to enter a percentage value, 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 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 offer 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 URLs will open in a separate browser window.

Next Cancel

WhatsApp Job Profile Details Lightning Experience | Sale... +

Setup Home Object Manager Search Setup

SETUP > OBJECT MANAGER Details New Custom Field Step 2: Enter the details Step 2 of 4

Field Label: Phone
Field Name: Phone
Description:
Help Text:
Required: Always require a value in this field in order to save a record
Auto add to custom report type: Add this field to existing custom report types that contain this entry
Default Value: Choose Formula Editor
Use Formula Editor. Enclose text and picklist values in double quotes ("Text", "Value"). Include numbers without spaces (123). Enter percentages as decimal (1.23), and express date calculations in the standard format (Today() + 7). To reference a field from a Custom Metadata type record use: \$CustomMetadataType__mdcRecordName.Field__c

Previous Next Cancel

Salesforce Setup - Job Profile - Details | Salesforce - Lightning Experience | Sales - +

WhatsApp Job Profile Details | Salesforce - lightning.force.com/lightning/setup/ObjectManager/015b000000j05J FieldAndRelationships/new

Cell YouTube Maps Global NetAcad ... Edit in Interactive...

Setup Home Object Manager

SETUP > OBJECT MANAGER Details

Details New Custom Field

Step 4: Add to page layouts Step 4 of 4

Field Label: Phone
Data Type: Phone
Field Name: Phone
Description:

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

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

Add Field Page Layout Name
 Details Layout

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

Previous Save & New Save Cancel

File T.JPG Details | Salesforce - Google Drive any2.htm assignment

Salesforce Setup - Job Profile - Details | Salesforce - Lightning Experience | Sales - +

WhatsApp Job Profile Details | Salesforce - lightning.force.com/lightning/setup/ObjectManager/015b000000j05J FieldAndRelationships/new

Gmail YouTube Maps Global NetAcad ... Edit in Interactive...

Setup Home Object Manager

SETUP > OBJECT MANAGER Details

Details Fields & Relationships

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 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 "14:40:50:000" 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.

Next Cancel

File T.JPG Details | Salesforce - Google Drive any2.htm assignment

Screenshot of the Salesforce Setup interface showing the creation of a new custom field.

The page title is "SETUP > OBJECT MANAGER Details".

The left sidebar shows the "Fields & Relationships" section selected, with other options like "Page Layouts", "Lightning Record Pages", etc., listed.

The main content area is titled "New Custom Field" and is on "Step 2: Enter the details".

Form fields include:

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

Help text for Default Value:

Use Formula Editor. Enter one or multiple values separated by double quotes (""). You can include numbers without quotes (123). When references are displayed, it shows the calculated value (Today() + 123) or reference a field from a Custom Metadata type record (use @CustomMetadataType__r.getRecordValue(Field__c)).

Buttons at the bottom: Previous, Next, Cancel.

Screenshot of the Salesforce Setup interface showing the continuation of creating a new custom field.

The page title is "SETUP > OBJECT MANAGER Details".

The left sidebar shows the "Fields & Relationships" section selected.

The main content area is titled "New Custom Field" and is on "Step 4: Add to page layouts".

Form fields include:

- Field Label: Date
- Data Type: Date
- Field Name: Date
- Description: (empty)

Instructions: 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.

Checkboxes:

- Add Field Page Layout Name
- Details Layout

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

Buttons at the bottom: Previous, Save & New, Save, Cancel.

Screenshot of the Salesforce Object Manager Details page showing field types and their descriptions.

Fields & Relationships is selected in the sidebar.

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 import data to Excel or another spreadsheet.
Date	Allows users to enter a date or pick a date from a pop-up calendar.
DateTime	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 DateTime field.
Email	Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
Geolocation	Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
Number	Allows users to enter any number. Leading zeros are removed.
Percent	Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.
Phone	Allows users to enter any phone number. Automatically formats it as a phone number.
Picklist	Allows users to select a value from a list you define.
Picklist (Multi-Select)	Allows users to select multiple values from a list you define.
Text	Allows users to enter any combination of letters and numbers.
Text Area	Allows users to enter up to 256 characters on separate lines.
Text Area (Long)	Allows users to enter up to 15,072 characters on separate lines.
Text Area (Rich)	Allows users to enter formatted text, add images and links. Up to 151,072 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 '14:40:59:600' 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.

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

New Custom Field is displayed in the main area.

Step 2: Enter the details

Field Label: Gender

Values:

Use global picklist value set

Enter values, with each value separated by a new line

Male
Female

Display values alphabetically, not in the order entered

Use first value as default value

Restrict picklist to the values defined in the value set

Field Name: Gender

Description:

Help Text:

Screenshot of the Salesforce Setup interface showing the creation of a new custom field.

The page title is "SETUP > OBJECT MANAGER Details".

The left sidebar shows the "Fields & Relationships" section selected.

The main content area is titled "New Custom Field" and displays "Step 4: Add to page layouts".

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

Instructions: 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.

Layout selection:
 Add Field Page Layout Name
 Details Layout

Buttons at the bottom:
Previous Save & New Save Cancel

Screenshot of the Salesforce Setup interface showing the list of fields for the object.

The page title is "SETUP > OBJECT MANAGER Details".

The left sidebar shows the "Fields & Relationships" section selected.

The main content area is titled "Fields & Relationships" and displays a table of fields.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Date	Date_c	Date		
Details Name	Name	Text(80)		
Gender	Gender_c	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Mail	Mail_c	Email		
Owner	OwnerId	Lookup(User,Group)		
Phone	Phone_c	Phone		

Salesforce Setup - Tabs | Salesforce

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: Default

(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

Cancel

Didnt find what you're looking for? Try using Global Search.

Salesforce Setup - Tabs | Salesforce

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.

Action	Label	Tab Style	Description
Edit	Courses	Building Block	
Edit	Demographics	Credit Card	
Edit	Details	Lightning	
Edit	Favourites	Dashboard	
Edit	Experience objects	Upfront	
Edit	Invoices	COVDO	
Edit	our customers	Book	
Edit	Properties	Airline	
Edit	retailers	Highway Sign	
Edit	Skincare products	Star	
Edit	Students	Bridge	

Help for this Page

Didnt find what you're looking for? Try using Global Search.

Salesforce Setup - Flows | Salesforce - Google Chrome - any2 - HFM assignment

Flow Label Process Type Active Temp... Package State Pack... Last Modif... Last Modified Date

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

Salesforce - Job Profile - Flows | Salesforce - Google Chrome - any2 - HFM assignment

New Flow

Core All + Templates

Screen Flow Record-Triggered Flow

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

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

Schedule-Triggered Flow Platform Event—Triggered Flow

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

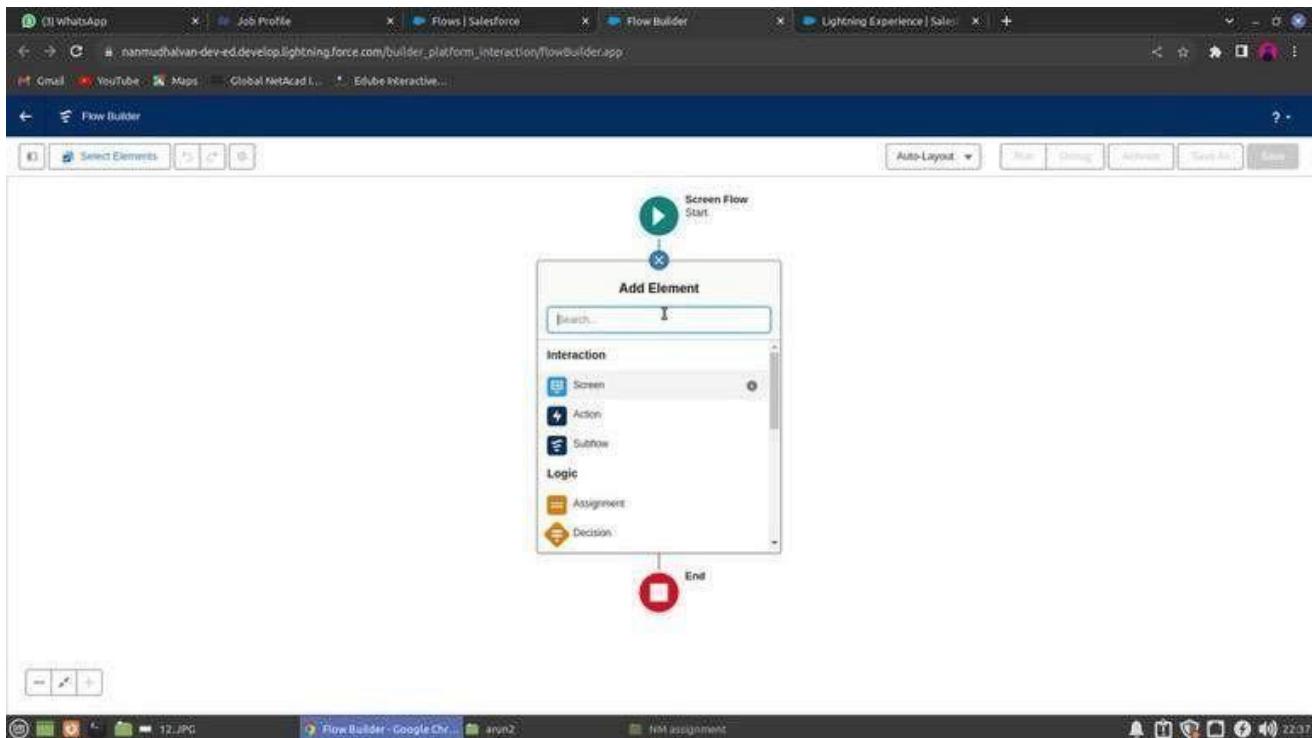
Launches when a platform event message is received. This autolaunched flow runs in the background.

Autolaunched Flow (No Trigger) Record-Triggered Orchestration

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

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

Create



New Screen

Components	Fields
Gen	First Name Last Name Email Phone

Date

Label:

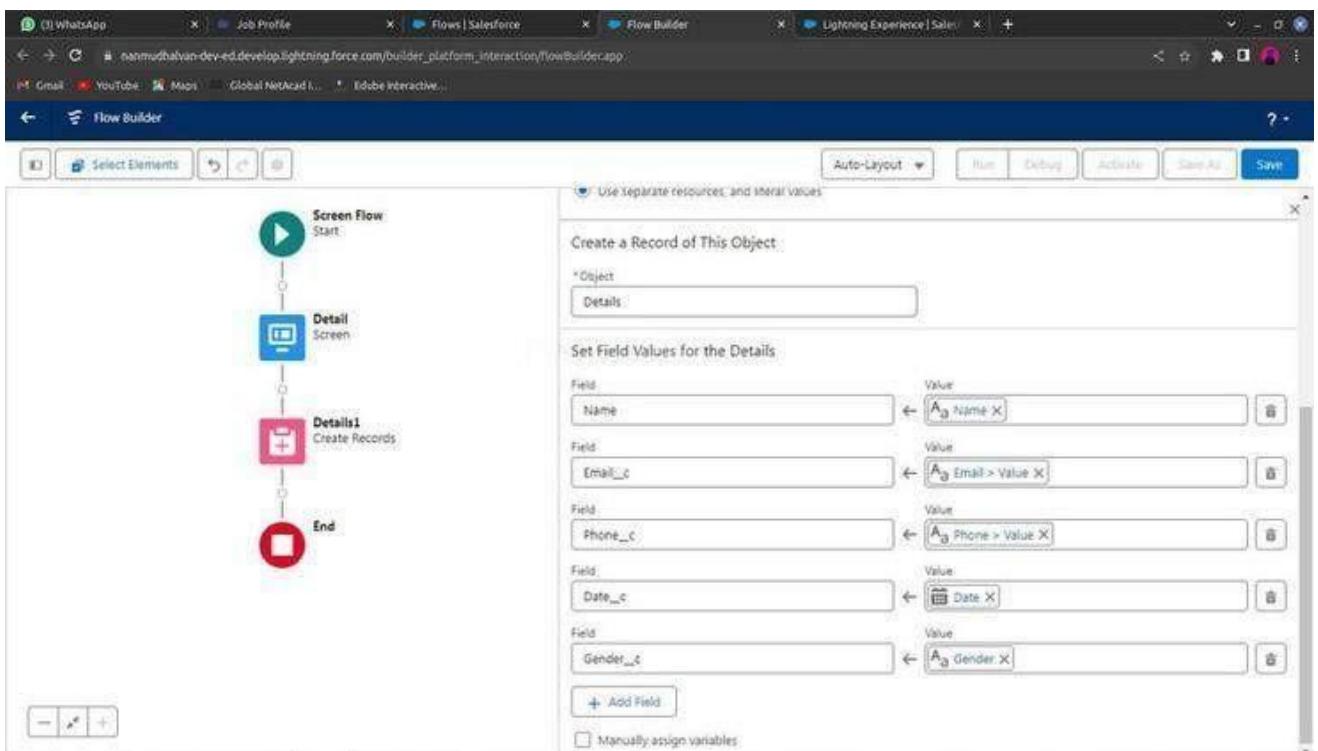
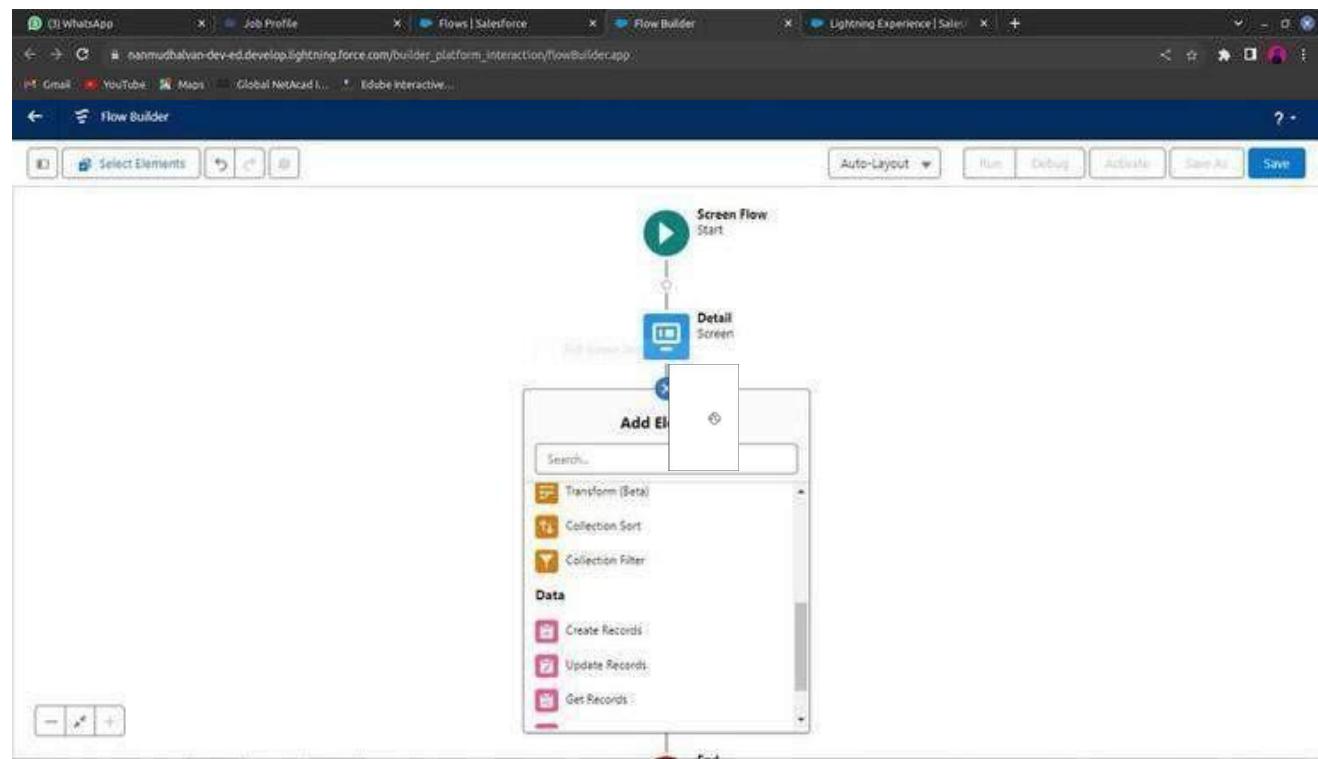
* API Name:

Require

Default Value:

> Set Component Visibility
> Validate Input
> Provide Help

Cancel Done



details

Name
sathishkumar

Email
sathishsk2003@gmail.com

Phone
6369914154

Date
22-Sept-2002

Gender
male

Next

Search...

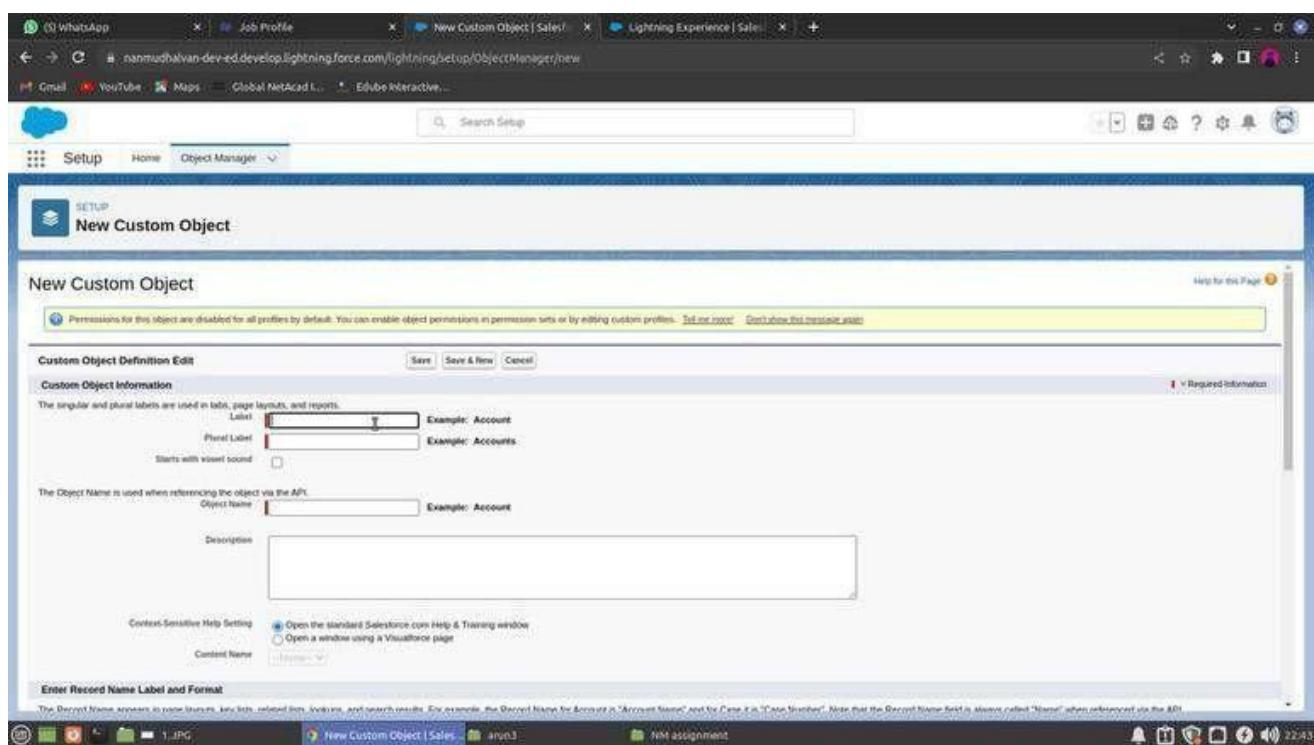
Service Home Chatter Accounts Contacts Cases Reports Dashboards colleges departments Details Providers Consumers Managements

Details: sathishkumar

New Contact Edit New Opportunity

Related		Details
Name	sathishkumar	Owner
Email	sathishsk2003@gmail.com	SATHISH KUMAR.S
Phone	6369914154	
Date	22/09/2002	
Gender	Male	
Created By	SATHISH KUMAR.S - 28/10/2023, 6:50 pm	
Last Modified By	SATHISH KUMAR.S, 28/10/2023, 6:50 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.



S WhatsApp Job Profile Tabs | Salesforce Lightning Experience | Sales...

← → C nanmudhalvan-dev-ed.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fu%2FcobjectCustomTabWizard/a%3FreURL%3D%232fsetup%252Fcustom...

Gmail YouTube Maps Global NetAcad... Edvibe Interactive...

Cloud Search Setup

Setup Home Object Manager

tabs

User Interface Rename Tabs and Labels Tabs

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

SETUP Tabs

New Custom Object Tab

Step 1. Enter the Details Step 3 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: [Classic](#)

(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

Help for this Page

S WhatsApp Job Profile Tabs | Salesforce Lightning Experience | Sales...

← → C nanmudhalvan-dev-ed.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fu%2FcobjectCustomTabWizard/a%3FreURL%3D%232fsetup%252F...

Gmail YouTube Maps Global NetAcad... Edvibe Interactive...

Cloud Search Setup

Setup Home Object Manager

tabs

User Interface Rename Tabs and Labels Tabs

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

SETUP Tabs

Custom Object Tabs

New What Is This?

Action	Label	Tab Style	Description
Edit Del	Companies		Building Block
Edit Del	Departments		Credit Card
Edit Del	Details		Lightning
Edit Del	Estimates		Diamond
Edit Del	Expense reports		Lightning
Edit Del	Inventories		CD/DVD
Edit Del	Managements		Camera
Edit Del	our customers		Phone
Edit Del	Properties		Airplane
Edit Del	orders		Highway Sign
Edit Del	Software Products		Star
Edit Del	Students		Triangle

Web Tabs

New What Is This?

No Web Tabs have been defined.

Cloud Search Setup

Help for this Page

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

My-app Recently Viewed: College Department Details Management

Management Recently Viewed

0 items Updated a few seconds ago

Management Name

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

New Import Change Owner

Search...

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. Learn more

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"/>	System Administrator	Salesforce Integration	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Silver Partner User	Silver Partner	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Standard Manager	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Standard Platinum User	Salesforce Platform	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Standard User	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/>	System Administrator	Salesforce	<input checked="" type="checkbox"/>

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

14 of 6 0 Selected Page 1 of 1

Search Setup

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

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

Profile Edit Manager

Name Manager 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"/>	WCC (standard_Work)	<input type="checkbox"/>	<input type="radio"/>
My app (Myapp)	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>			

Service Provider Access

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

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

Contact Point Contexts Streaming Channels

Contact Point Contexts	Streaming Channels
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>

Contact Point Emails User External Credentials

Contact Point Emails	User External Credentials
<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>

Custom Object Permissions

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

Session Settings

Session Timeout 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

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

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

Contact Point Contexts Streaming Channels

Contact Point Contexts	Streaming Channels
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>

Contact Point Emails User External Credentials

Contact Point Emails	User External Credentials
<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>

Custom Object Permissions

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

Session Settings

Session Timeout 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

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

Profiles

Profile Manager

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

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

Enabled IP Ranges (1) | Enabled Apex Class Access (1) | Enabled Visualforce Page Access (1) | Enabled External OData Source Access (1) | Enabled Named Credential Access (1) | Enabled External Credential Provider Access (1) | Enabled Custom Metadata Type Access (1) | Enabled Custom Setting Definition Access (1) | Enabled Flow Access (1) | Enabled Service Pipeline Status Access (1) | Enabled Custom Permissions (1)

Profile Detail

Name	Manager	Custom Profile	
User License	Salesforce Platform	<input checked="" type="checkbox"/>	
Description			
Created By	Anup_1	Modified By	Anup_1
	10/10/2023, 3:47 pm		10/10/2023, 3:48 pm

Page Layouts

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

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

user

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Datacom

Prospector Users

Service

Embedded Service

Messaging for In-App and Web User

SETUP Users

New User

User Edit

Save Save & New Cancel

General Information

First Name: manager

Last Name: t

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:

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

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Search Setup

Setup Home Object Manager

User

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Service

Embedded Service

Messaging for In-App and Web User

SETUP Users

New User

User Edit Save Save & New Cancel

General Information

First Name manager

Last Name 2

Alias m2

Email managerxyzxyz@gmail.com

Username managerxyzxyz@gmail.com

Nickname User1097624453758508865

Title

Company

Department

Division

Role Marketing Team

User License Salesforce

Profile Solution Manager

Active

Marketing User

Office User

Knowledge User

Flow User

Service Cloud User

Site.com Contributor User

Site.com Publisher User

WDC User

Help for this Page

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

per

Hyperforce Assistant

Lightning Experience Transition Assistant

Users

Permission Set Groups

Permission Sets

Digital Experiences

Settings

Functions

Sales

Accounts

Person Accounts

Salesforce Scheduler

Assignment Policies

Salesforce Scheduler

SETUP Permission Sets

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 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 Licensee 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 ce...	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	Lets users create, read, edit, and delete locations, audiob...	Salesforce
<input type="checkbox"/>	Facility Manager		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

4 Previous Next 1 of 2

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

Permission Sets

Permission Set manager12

Description: License: Session Activation Required: Permission Set Groups Added To: API Name: manager12 Namespace Prefix: Created By: Anmol_18/10/2023, 3:52 pm Last Modified By: Anmol_18/10/2023, 3:52 pm

Apps

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

Video Tutorial | Help for this Page

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Search Setup

Setup Home Object Manager

Permission Sets

Permission Set manager12

Permission Set Overview > Object Settings > Accounts

Accounts

Save Cancel

Object Permissions

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

Field Permissions

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

Setup Home Object Manager

user

All Users

1 item selected

Full Name	Alias	Username	Role	Active	Profile
Chatter Expert	Chatter	chatty@00d5j00000ciqpaeav.kbt1rt04y2af@chatter.salesforce.com	Marketing Team	✓	Chatter Free-User
Consumer 5	c5	cons5@gmail.com	Marketing Team	✓	Consumer
Integration User	integ	integration@00d5j00000ciqpaeav.com	Marketing Team	✓	Analytics Cloud Integration User
Manager 1	m1	sathish11@gmail.com	Marketing Team	✓	Manager
Manager 2	m2	manegm221@gmail.com	Marketing Team	✓	Solution Manager
Provider 1	p1	sathiskumars100@gmail.com	Marketing Team	✓	Provider
SATHISH KUMAR S	ss	sathishkumar103@gmail.com	Marketing Team	✓	System Administrator
Security User	sec	insightssecurity@00d5j00000ciqpaeav.com	Marketing Team	✓	Analytics Cloud Security User

Cancel Next

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

Search Setup

Q per:

Hyperforce Assistant

Lightning Experience Transition Assistant

Users

Permission Set Groups

Permission Sets

Digital Experiences Settings Functions

Sales Accounts Person Accounts

Salesforce Scheduler Assignment Policies

Salesforce Scheduler

Select an Expiration Option For Assigned Users

No expiration date

Specify the expiration date

1 day 1 Week 30 Days 60 Days Custom Date

Time Zone Select a time zone...

Selected Users

Full Name	Role	Profile	Active	User License	Expires On
manager 1	Marketing Team	Manager	✓	Salesforce Platform	Never Expires

Cancel Back Assign

The screenshot shows the Salesforce Setup interface. On the left, there's a sidebar with various links like 'Setup', 'Home', 'Object Manager', etc. The main area is titled 'Current Assignments' for a permission set named 'manager12'. A table displays the following data:

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

At the top right of the main area, there are buttons for 'Edit' and 'Add Assignment'.

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

WhatsApp Job Profile New Custom Object Lightning Experience | Sales

Setup Home Object Manager Search Setup

SETUP New Custom Object

New Custom Object

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

Custom Object Definition Edit

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: Bank Example: Account

Description:

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

Content Name:

Enter Record Name Label and Format

The Record Name appears in home screens, new lists, related lists, feeds, and search results. For example, the Record Name for Accounts is "Account Name" and for Case is "Case Number". Note that the Record Name field is always called "Record" when referenced via the API.

Record Name: Record Format:

Save Save & New Cancel

Help for this Page

WhatsApp Job Profile Home | Salesforce Lightning Experience | Sales

Setup Home Object Manager Search Setup

SETUP Tabs

New Custom Object Tab

Step 1: Enter the Details Step 1 of 3

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

Select an existing custom object or [Create a new custom object](#).

Object: Bank **Tab Style:** Card [\(Optional\) 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](#)

Description:

Next Cancel

WhatsApp Job Profile Bank Salesforce Lightning Experience | Sales

Cell YouTube Maps Global NetAcad... Edube Interactive...

Setup Home Object Manager

SETUP > OBJECT MANAGER Bank

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restrict Rule

Scoping Rules

Triggers

Flow Triggers

Details

Description:

API Name: Bank_c

Custom: ✓

Singular Label: Bank

Plural Label: Banks

Enable Reports

Track Activities

Track Field History

Deployment Status: Deployed

Help Settings: Standard salesforce.com Help Window

https://nanmudhalvan-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01Gh000000go7Q/Details/view

WhatsApp Job Profile New Custom Object | Sales Lightning Experience | Sales

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

Setup Home Object Manager

SETUP New Custom Object

New Custom Object

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

Custom Object Definition Edit Save Save A New Cancel

Custom Object Information

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

Singular Label: Customer Example: Account

Plural Label: Customers Example: Accounts

Starts with vowel sound:

Required Information

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:

Enter Record Name Label and Format

The Record Name appears in new records, list items, related lists, lookup, and search results. For example, the Record Name for Accounts is "Account Name" and the Name 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

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

Search Setup

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

Data Type

None Selected Select one of the data types below.

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

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

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

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

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

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

The relationship field allows users to click on a lookup icon to select a value from a pop-up 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

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

Search Setup

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: Add custom related lists Step 6 of 6

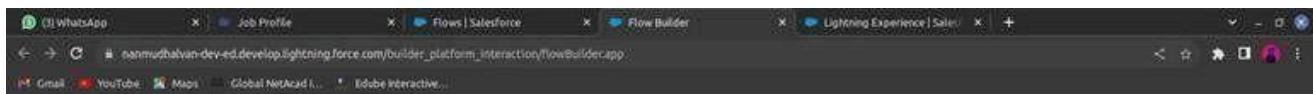
Field Label: Bank
Data Type: Master-Detail
Field Name: Bank
Description:

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
 Back Layout

Append related list to users' existing personal customizations

Previous Save & New Save Cancel



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Learn more

Cloud Search 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

Profile Standard Platform User

Full screen 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.

Enabled External Data Source Access [] Enabled External Credential Access [] Enabled External Data Source Access [] Enabled External Credential Access []
Enabled External Credential Access [] Enabled Custom Metadata Type Access [] Enabled Custom Setting Definition Access [] Enabled Page Access [] Enabled Service Presence Status Access []
Enabled Custom Permissions []

Profile Detail

Name: Standard Platform User
User License: Salesforce Platform
Created By: salesforce.com, inc., 17/10/2023, 10:41 am
Modified By: Anu J., 18/10/2023, 3:34 pm

Page Layouts

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

Screenshot of the Salesforce Setup interface showing the "Clone Profile" screen.

The left sidebar shows the navigation menu under "Users":

- Hyperforce Assistant
- Users
 - Profiles (selected)
 - Data
- Feature Settings
- Data.com
 - Prospector Preferences
 - Prospector Users
 - Functions
- Marketing
- Lead Processes
- Sales
 - Products
- Asset Settings

The main content area displays the "Clone Profile" page:

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

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

Save Cancel

Screenshot of the Salesforce Setup interface showing the "Profile Edit" screen for the "Management" profile.

The left sidebar shows the navigation menu under "Users":

- Hyperforce Assistant
- Users
 - Profiles (selected)
 - Data
- Feature Settings
- Data.com
 - Prospector Preferences
 - Prospector Users
 - Functions
- Marketing
- Lead Processes
- Sales
 - Products
- Asset Settings

The main content area displays the "Profile Edit" page for the "Management" profile:

Profile Edit: Management

Set the permissions and page layouts for this profile.

Profile Edit

Name	Management
User License	Salesforce Platform
Description	[Empty text area]

Save Save & New Cancel

Custom App Settings

	Visible	Default	Visible	Default	
Analytics Studio (standard_analytics)	<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 checked="" type="radio"/>
My app (Myapp)	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>			

Service Provider Access

The screenshot shows the Salesforce Setup interface with the following details:

- Header:** The top navigation bar includes tabs for WhatsApp, Job Profile, Flows | Salesforce, Flow Builder, and Lightning Experience | Sales.
- Breadcrumbs:** The path "nanmudhalvan-dev-ed.lightning.force.com/builder_platform_interaction/flowBuilderApp" is visible.
- Left Sidebar:** A navigation menu under "SETUP" with sections like Hyperforce Assistant, Users (selected), Data, Feature Settings, Data.com, Marketing, Lead Processes, Sales, Products, and Asset Settings.
- Main Content:** The "Profiles" page is displayed, showing settings for Contact Point Contexts, Streaming Channels, User External Credentials, and Custom Object Permissions (Bank, College, Customer, Department, Details, Management) across various object fields (Read, Create, Edit, Delete, View All, Modify All).
- Session Settings:** Session times out after 2 hours of inactivity, and session security level required at login is set to "None".
- Password Policies:** User passwords expire in 90 days, and enforce password history is set to 3 passwords remembered.

Salesforce

Recently Viewed | Management

avseengineeringcollege97-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F00S%2Fe%3FreURL%3D%252F00S%253FisUserEn...

Gmail YouTube Maps Global NetAcad... Edible Interactive...

Cloud Setup Home Object Manager

Q user

Users

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

SETUP

Users

New User

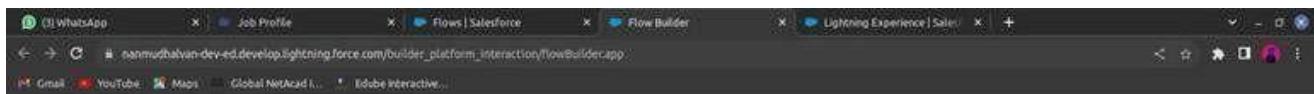
User Edit

Save Save & New Cancel

General Information

First Name: manager
Last Name: bank
Alias: imbank
Email: managerbank@gmail.com
Username: managerbank@gmail.com
Nickname: User1697625040398307733
Title:
Company:
Department:
Division:

Role: <None Specified>
User License: Partner App Subscription
Profile: Partner App Subscription User
Active:
Marketing User:
Offline User:
Knowledge User:
Flow User:
Service Cloud User:
Site.com Contributor User:
Site.com Publisher User:
WDC User:



A screenshot of the Salesforce Setup interface, specifically the Profiles page. On the left, there's a sidebar with options like Setup, Home, Object Manager, and a search bar. The main area shows a list of profiles under 'Profiles'. One profile, 'Sales Manager', is selected and shown in a detailed edit view. The 'Profile Edit' screen has a 'Sales Manager' name, 'Salesforce Platform' user license, and a checked 'Custom Profile' checkbox. In the 'Custom App Settings' section, three apps are listed: 'Analytics Studio (standard_Analytics)', 'App Launcher (standard_AppLauncher)', and 'My-app (Myapp)'. The 'Platform (standard_Platform)' app is marked as both 'Visible' and 'Default'. Other apps like 'WCC (standard_WCC)' and 'Work (standard_Work)' are also listed but not selected. At the bottom, there are 'Save', 'Save & New', and 'Cancel' buttons.

Salesforce

Recently Viewed | Management

avseengineeringcollege97-dev-ed.develop.lightning.force.com/lightning/c/setup/EnhancedProfiles/page?address=%2f00e5j000000mxk%2Fe%3FretURL%3D%252F0... G Learn more

Setup Home Object Manager

Q prof

v Users

Profiles

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

SETUP Profiles

Contact Point Addresses Contact Point Consents Contact Point Emails

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

Sellers Streaming Channels User External Credentials

	Read	Create	Edit	Delete	View All	Modify All
Department	<input type="checkbox"/>					
Details	<input type="checkbox"/>					
Management	<input type="checkbox"/>					

Custom Object Permissions

Session Settings

Session Timeout After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

User passwords expire in: 90 days

The screenshot shows the Salesforce Setup interface with the 'Profiles' page selected. On the left, there's a sidebar with 'Users' and 'Profiles' sections. The main area has a search bar and tabs for 'Contact Point Addresses', 'Contact Point Consents', and 'Contact Point Emails'. Below these are two large tables for 'Custom Object Permissions' and 'Streaming Channels'. The first table lists objects like 'Bank', 'College', 'Customer', 'Department', 'Details', and 'Management' with checkboxes for various permissions (Read, Create, Edit, Delete, View All, Modify All). The second table lists the same objects with checkboxes for streaming channels. At the bottom, there are sections for 'Session Settings' (timeout after 2 hours) and 'Password Policies' (passwords expire in 90 days).

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

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Cloud Setup Home Object Manager

Q. prof

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	rmsale	Profile	Partner App Subscription User
Email	managersales.123@gmail.com	Active	<input checked="" type="checkbox"/>
Username	managersales.123@gmail.cc	Marketing User	<input type="checkbox"/>
Nickname	User1697625227951209885	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"/>

Help for this Page

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

Learn more X

The screenshot shows the Salesforce Setup interface. The left sidebar has a 'Permission Sets' section selected under 'Users'. The main content area is titled 'Permission Sets' and displays a list of permission sets with columns for Action, Permission Set Label, Description, and License. The list includes entries like 'B2B', 'B2B Buyer Manager', 'CRM User', etc. A navigation bar at the bottom shows '1-25 of 31' and '0 Selected'.

Action	Permission Set Label	Description	License
<input type="checkbox"/>	B2B	Allows access to the store. Lets users see products and includes all Buyer capabilities, and allows access to ma...	B2B Buyer Permission Set One Seat
<input type="checkbox"/>	Buyer Manager		B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/>	CRM 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 ce...	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		Salesforce
<input type="checkbox"/>	Experience Profile Manager		
<input type="checkbox"/>	Facility Manager	Lets users create, read, edit, and delete locations, subloc...	Facility Manager

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

Learn more X

The screenshot shows the Salesforce Setup interface. The left sidebar is titled "Setup" and includes sections for "Users", "Permission Set Groups", and "Permission Sets". The "Permission Sets" section is currently selected. The main content area is titled "Permission Sets" and shows a list of permission sets. One permission set is highlighted: "managerbanksales". The details for this permission set are displayed, including its API name ("managerbanksales"), namespace prefix ("managerbanksales"), and creation and modification dates. Below the details, there are sections for "Apps" and various configuration options like "Assigned Area", "Assigned Connected Area", "Object Settings", "App Permissions", and "Apex Class Access".

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

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This screenshot shows the "Object Settings" tab for the "managerbanksales" permission set. The main content area displays the "Accounts" object settings. Under "Object Permissions", a table lists permissions for the "Account" object, with "Read" and "View All" checked. Under "Field Permissions", a table lists field-level permissions for the "Account" object, with "Name" having both "Read Access" and "Edit Access" checked.

Setup Home Object Manager

Search Setup

All Users

1 item selected

Search this list...

Full Name ↑	Alias	Username	Role	Active	Profile
Chatter Expert	Chatter	chatty/00d5j00000cjpaeav.ktx1rt04y2af@chatter.salesforce.com	Marketing Team	<input checked="" type="checkbox"/>	Chatter Free User
Consumer 5	c5	cons5@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Consumer
Integration User	integ	integration@00d5j00000cjpaeav.com	Marketing Team	<input checked="" type="checkbox"/>	Analytics Cloud Integration User
Manager 1	m1	sathish11@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Manager
Manager 2	m2	manager221@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Solution Manager
Provider 1	p1	sathiskumars100@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Provider
SATHISH KUMAR S	ss	sathishkumar103@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	System Administrator
Security User	sec	insightssecurity@00d5j00000cjpaeav.com	Marketing Team	<input checked="" type="checkbox"/>	Analytics Cloud Security User

C Cancel Next

The screenshot shows the Salesforce Lightning Experience interface. At the top, there are several tabs: WhatsApp, Job Profile, Flows | Salesforce, Flow Builder, and Lightning Experience | Sales. Below the tabs, the URL bar displays the path: /nannuthavan-dev-ed.lightning.force.com/builder_platform_interaction/flowBuilder.app. The main content area is titled "Customers Recently Viewed". It shows a message stating "0 items • Updated a few seconds ago". There is a search bar labeled "Search this list..." and a set of icons for filtering and sorting. A note below the search bar says "You haven't viewed any Customers recently. Try switching list views." The top navigation bar includes links for My-app, Recently Viewed, College, Department, Details, Management, Customers, and Bank.