

Naan Mudhalvan

Salesforce Developer (Course)

Assignment

Name: SREE DEVI K

Naan Mudhalvan id: 27DEE946EEBB682BC004DF0B51891ECB

Year and Dept: 4th year and CSE

Batch: 2024

Zone.no: Zone 8

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

WhatsApp | New Custom Object (Sales) | nanmudhalvan-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new

Setup | Home | Object Manager

SETUP New Custom Object

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

Custom Object Definition Edit

Save Save & New Cancel

Custom Object Information

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

Label: Example: Account

Plural Label: Example: Accounts

Starts with vowel sound: ☐

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

Object Name: Example: Account

Description:

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

Content Name:

Enter Record Name Label and Format

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

Record Name: Example: Account Name

WhatsApp | New Custom Object (Sales) | nanmudhalvan-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new

Setup | Home | Object Manager

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Save Save & New Cancel

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Object Name: Example: Account

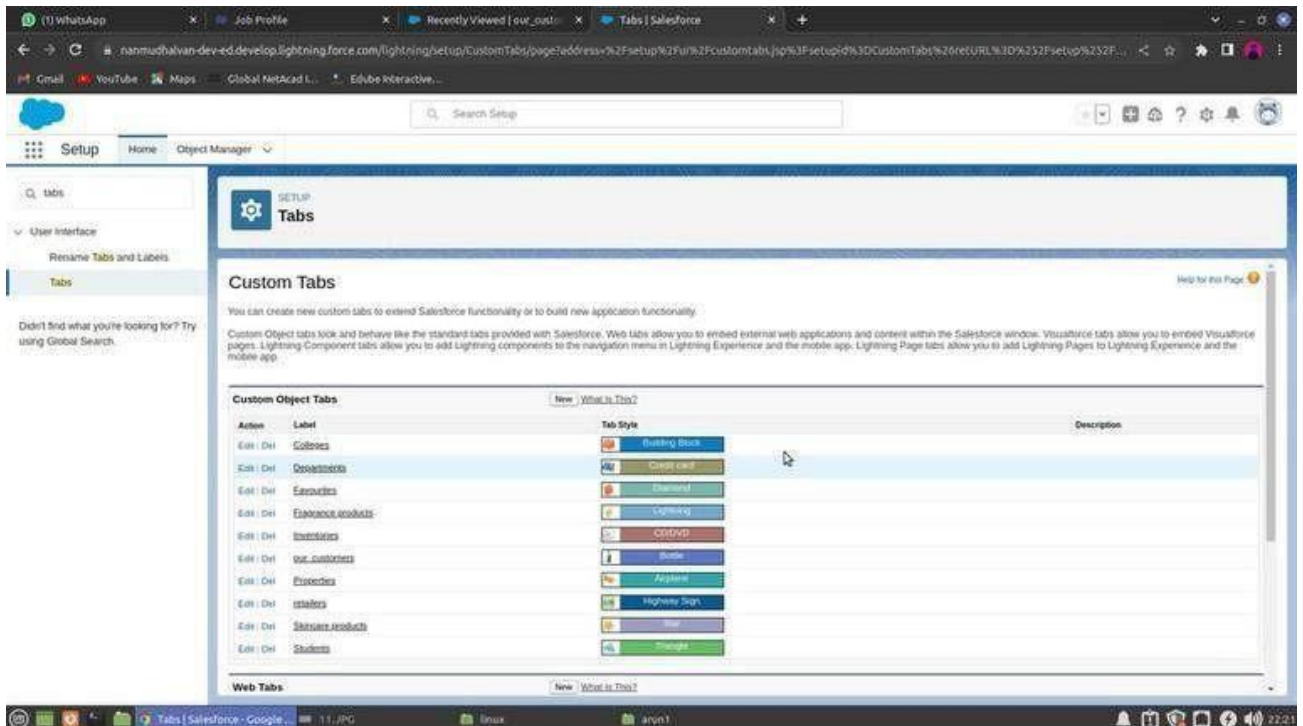
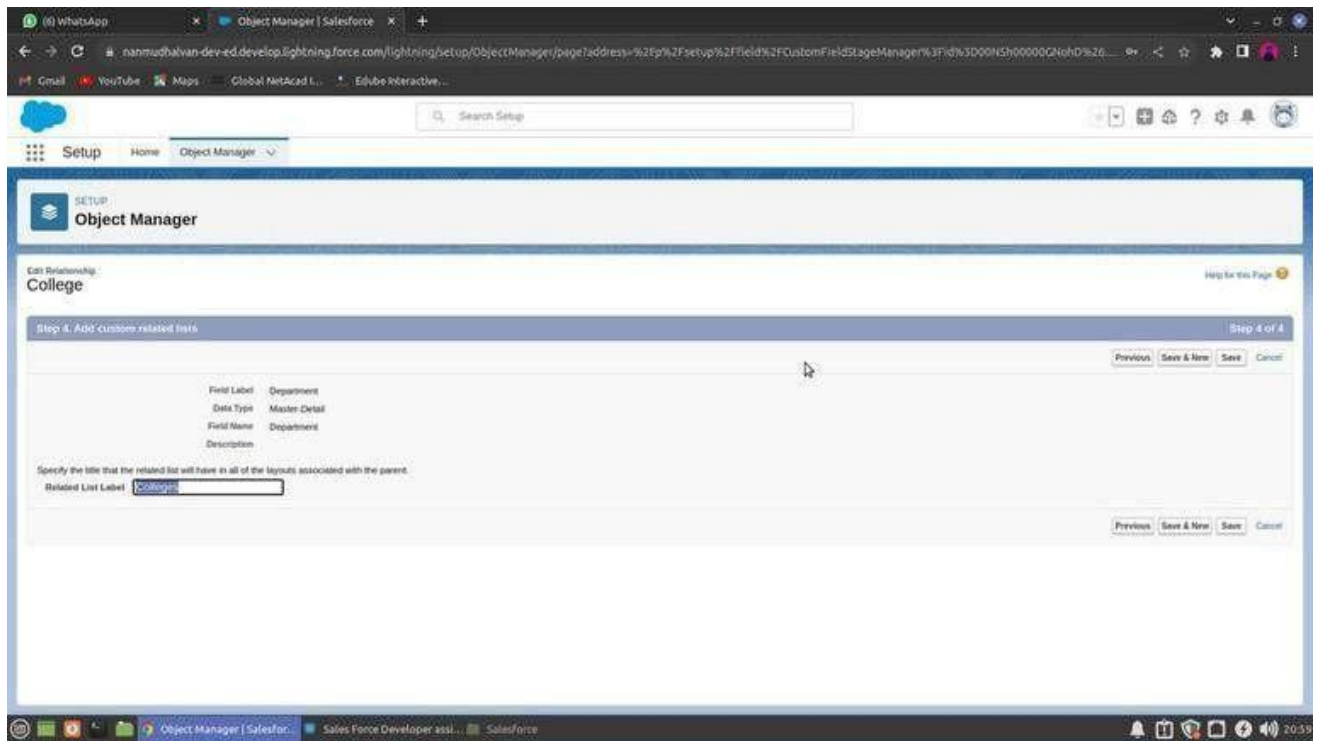
Description:

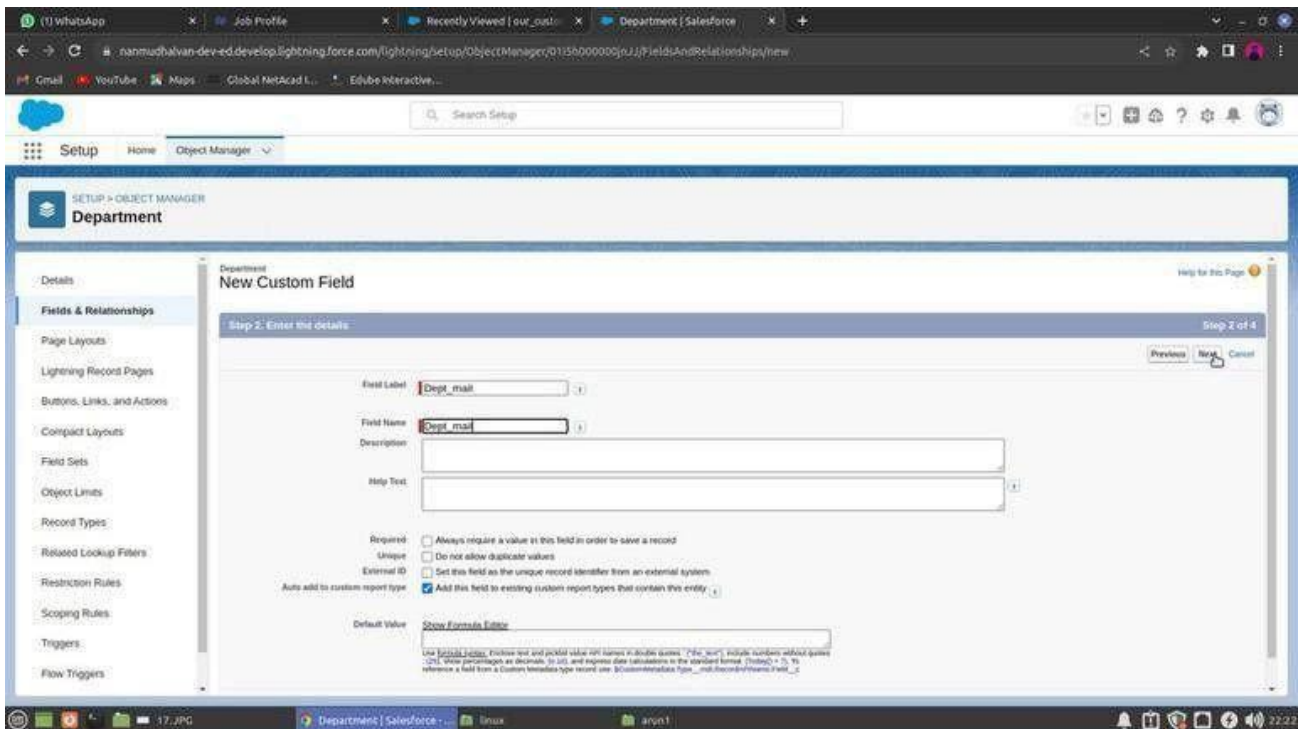
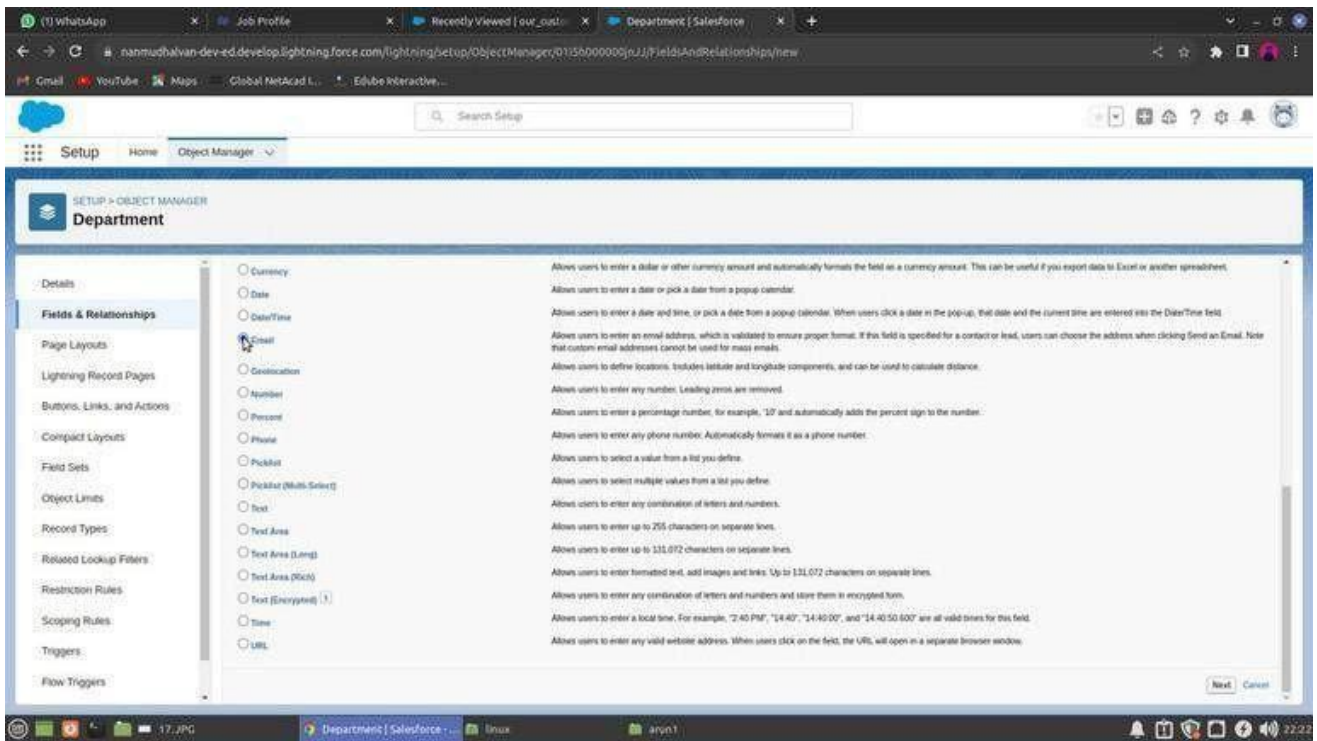
Context Sensitive Help Setting: ☒ Open the standard Salesforce.com Help & Training window ☐ Open a window using a Visualforce page

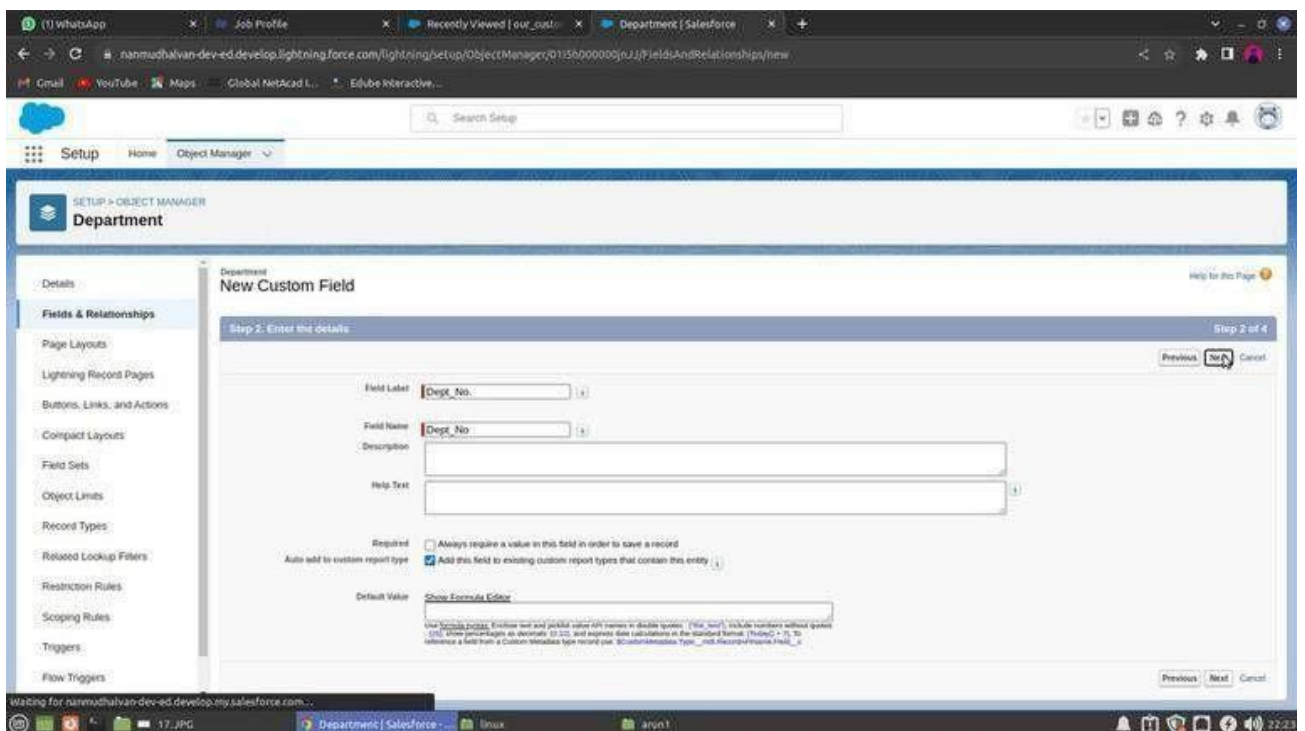
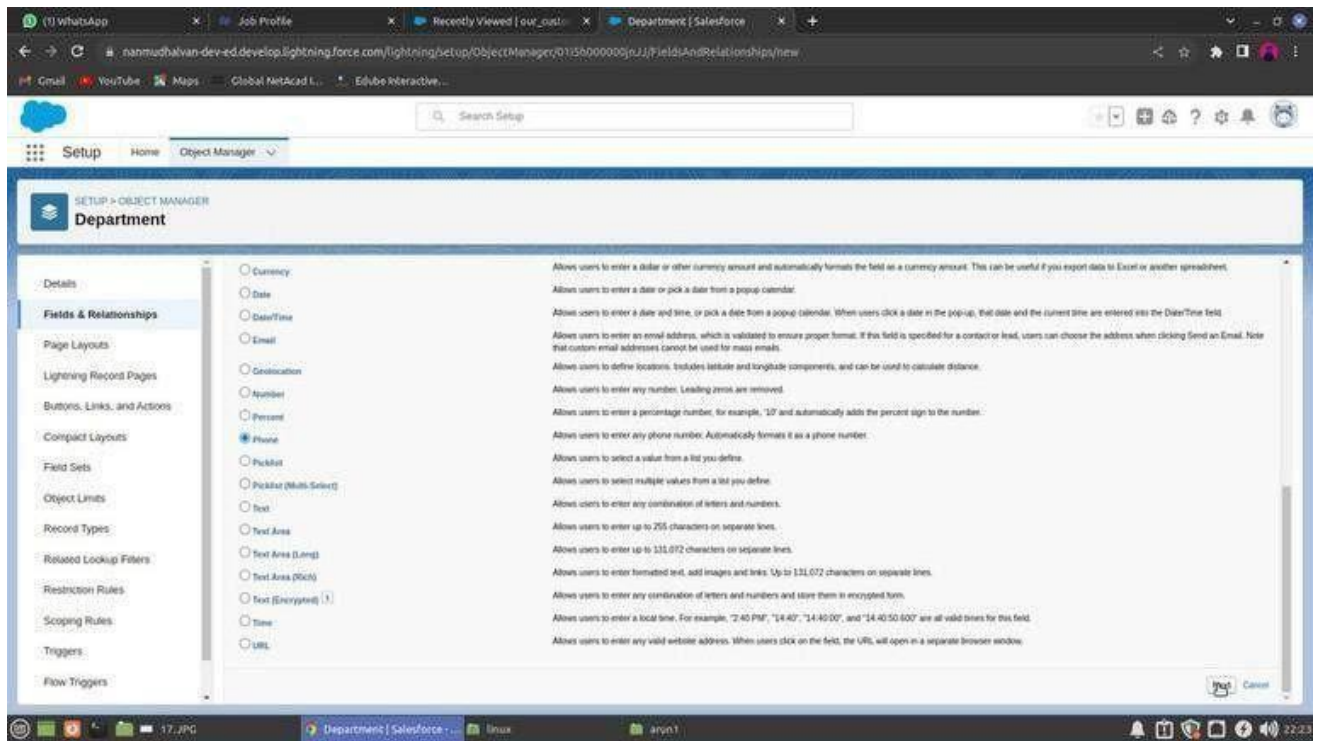
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Setup > OBJECT MANAGER
Department

Details

Fields & Relationships

7 Items, Sorted by Field Label

Quick Find

New Deleted Fields Field Dependencies Set History Tracking

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

Setup > OBJECT MANAGER
Department

Details

Fields & Relationships

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

Full Screen Edit

Next Cancel

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

Data Type

☐ None Selected

Select one of the data types below.

☐ Auto Number

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

☐ Formula

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

☐ Roll-Up Summary

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

☐ Lookup Relationship

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

☒ Master-Detail Relationship

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

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

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

☐ External Lookup Relationship

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

Setup Home Object Manager

SEARCH Setup

SETUP > OBJECT MANAGER
Department

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Department
New Relationship

Help for this Page

Step 6 of 6: Add custom related lists

Previous Save & New Save Cancel

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

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

SEARCH Setup

SETUP > OBJECT MANAGER
College

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Data Type

Select one of the data types below:

- ☐ None Selected
- ☐ Auto Number
- ☐ Formula
- ☒ Roll-Up Summary
- ☐ Lookup Relationship
- ☐ Master-Detail Relationship
- ☐ External Lookup Relationship
- ☐ Checkbox
- ☐ Currency
- ☐ Date

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

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

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

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

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

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- You can create rollup summary fields on the master record to summarize the detail records.

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

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

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

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

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

Setup Home Object Manager

Search Setup

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

Roll-up Summary

Help for this Page

Step 2. Enter the details

Step 2 of 5

Field Label: Total Count

Field Name: Total_Count

Description:

Help Text:

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

Previous Next Cancel

Setup Home Object Manager

Search Setup

College

Details:

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

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Record Types

Related Lookup Filters

Search Layouts

College

New Custom Field

Roll-up Summary

Help for this Page

Step 3. Define the summary calculation

Step 3 of 5

Previous Next Cancel

Select Object to Summarize

Master Object: College

Summarized Object: Department

Select Roll-Up Type

☒ COUNT

☐ SUM

☐ MIN

☐ MAX

Field to Aggregate:

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

College

Details

Fields & Relationships

3 items, Sorted by Field Label

Quick Find

New Deleted Fields Field Dependencies Set History Tracking

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

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Setup Home Object Manager

Lightning Experience App Manager

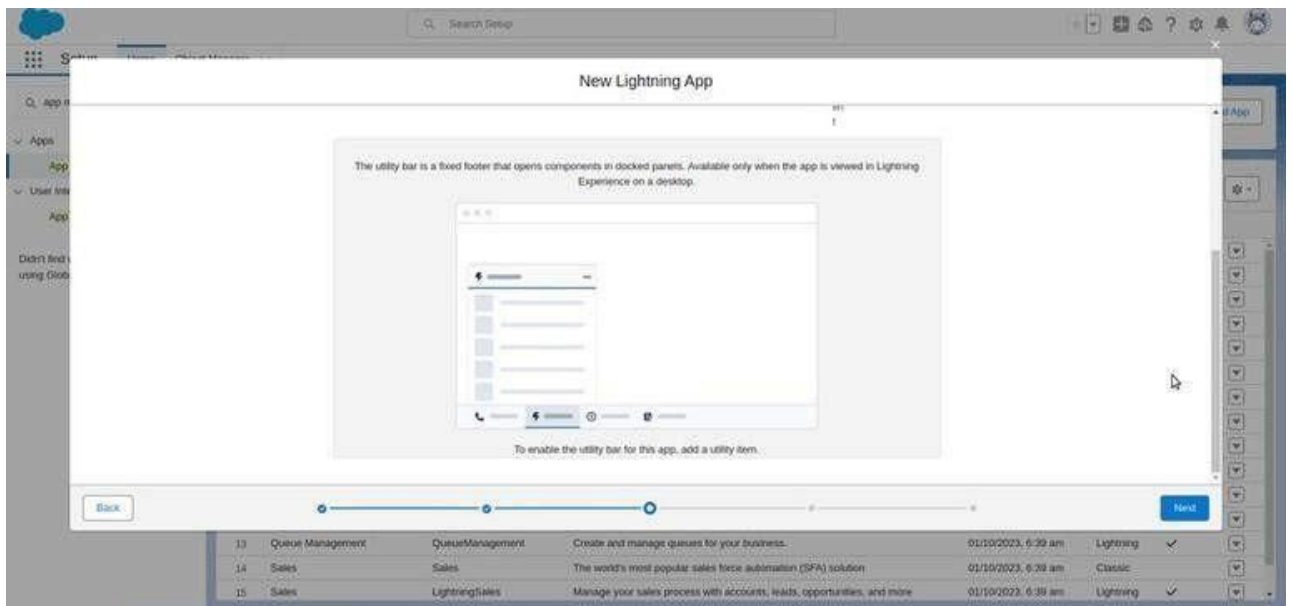
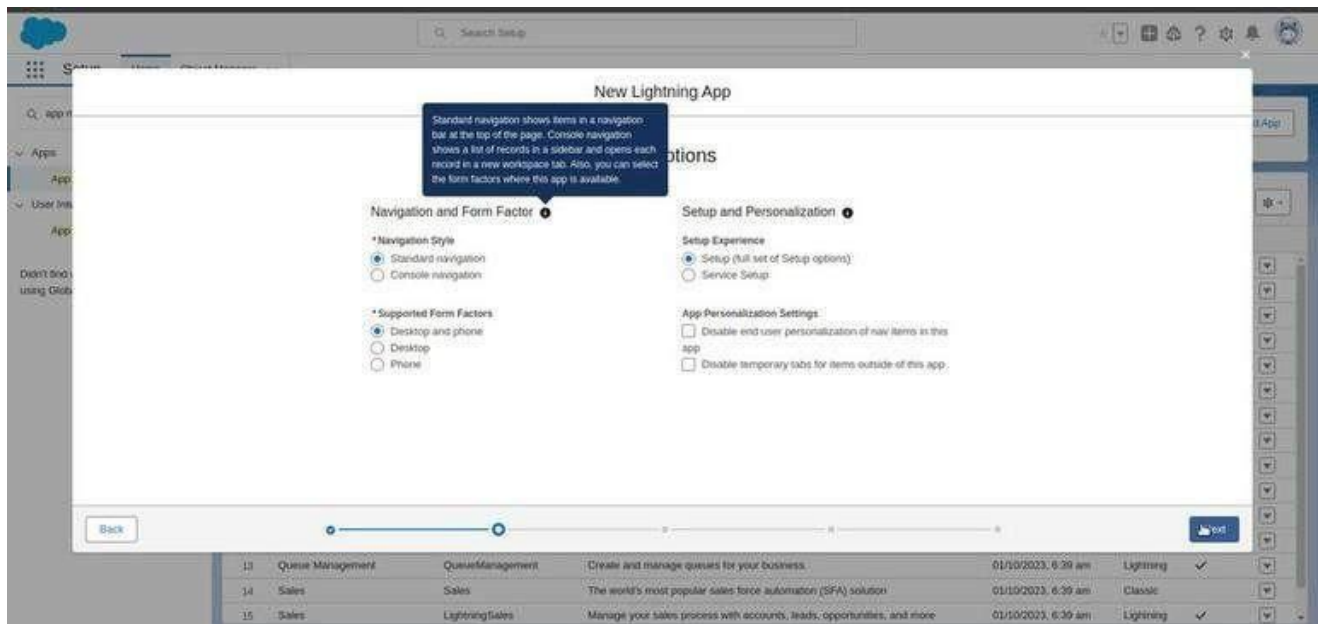
New Lightning App New Connected App

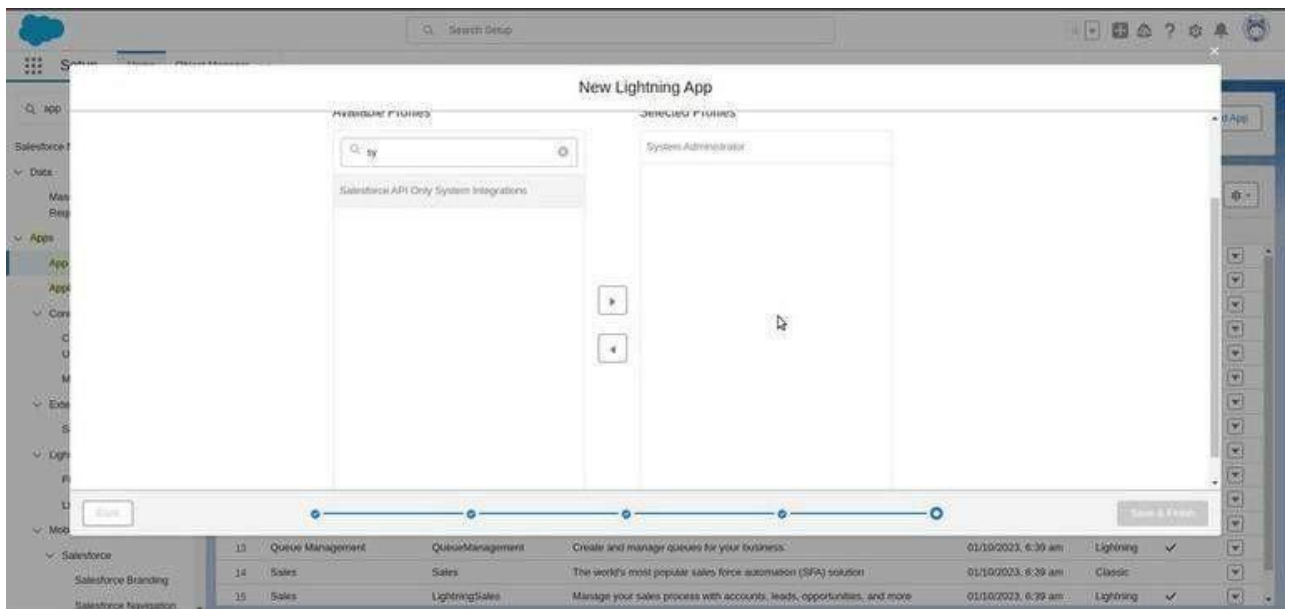
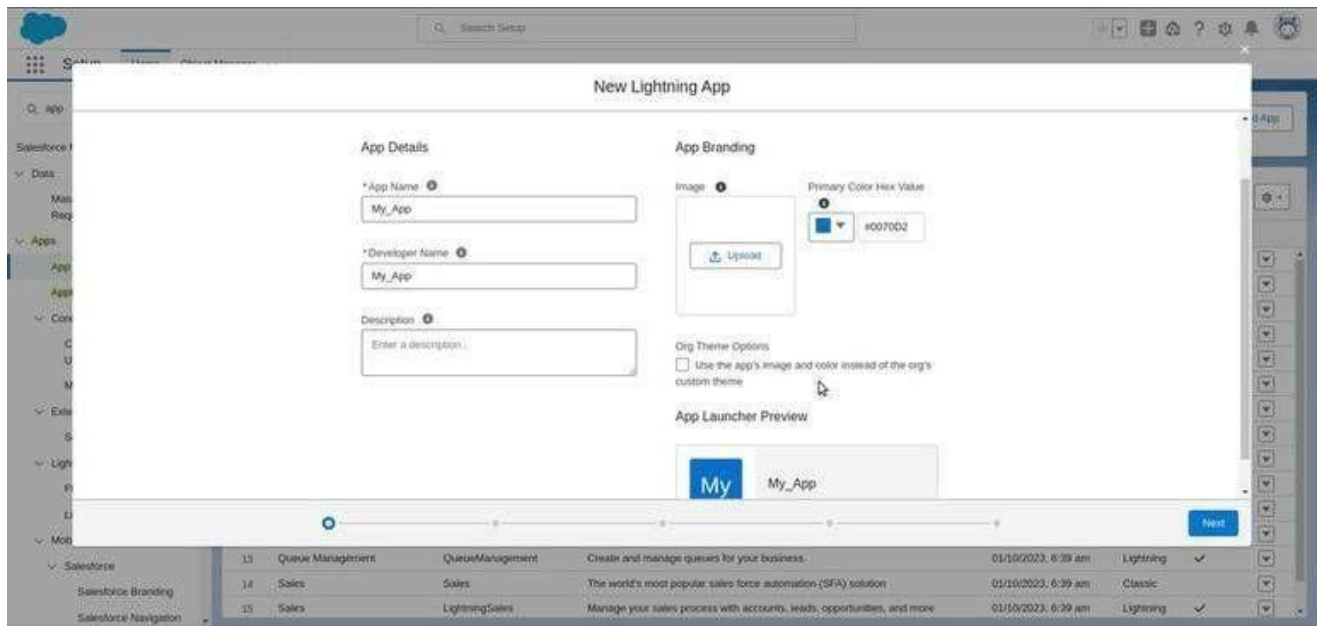
22 items • Sorted by App Name • Filtered by All app:nutems - TabSet Type

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

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

<https://na01muthalvan-dev-ed.develop.lightning.force.com/one/one.app#/setup/navigationMenu/home>





colleges

Recently Viewed

0 items • Updated a few seconds ago

college Name

New college

* college Name

AVS Engineering college

Owner

SATHISH KUMAR S

Cancel

Save & New

Save

Service

Home

Chatter

Accounts

Contacts

Cases

Reports

Dashboards

colleges

departments

Details

Providers

Consumers

Managements

Search...

colleges

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

New

Import

New department

Information

* Required 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

Total count

1

Created By

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

Owner

SATHISH KUMAR S

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.

Setup > OBJECT MANAGER

Details

Fields & Relationships

4 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

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

Details

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

Details | Salesforce - Coog... | anur2... | 22:30

Setup > OBJECT MANAGER

Details

Fields & Relationships

4 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

Relationships

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

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

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

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

Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the 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 outside email addresses cannot be used for mass emails.

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

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

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

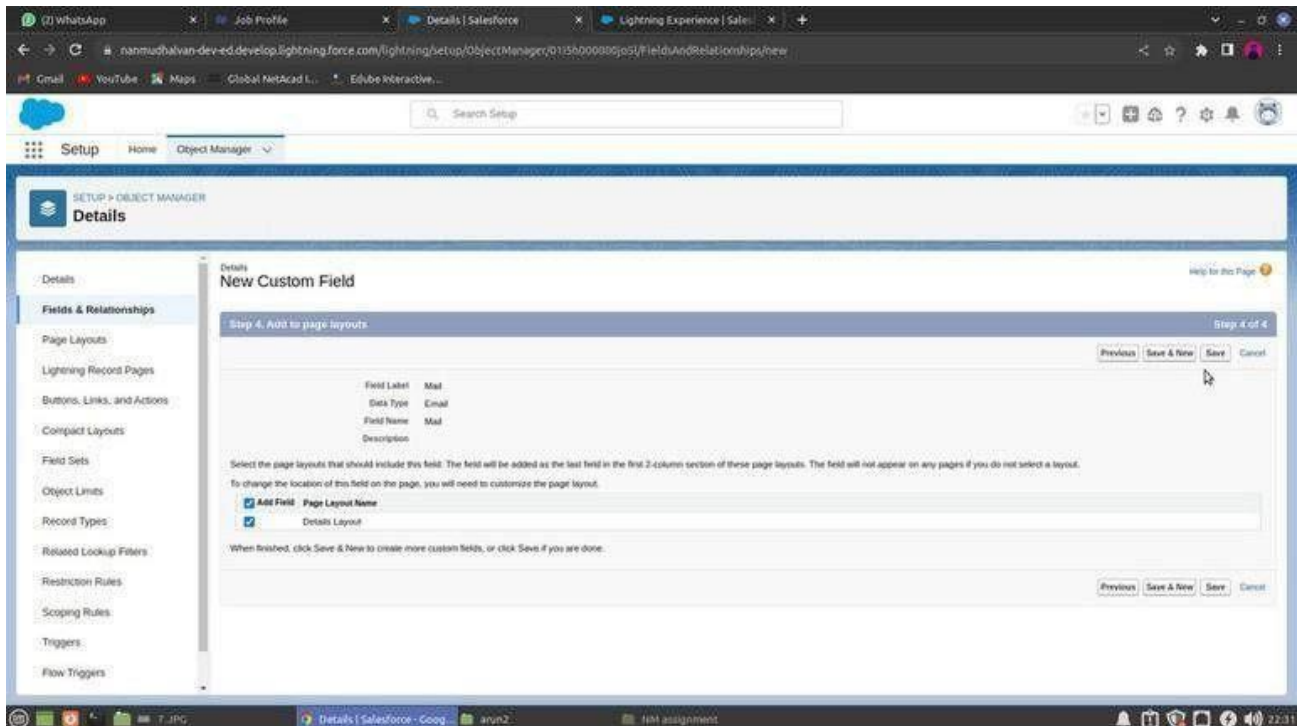
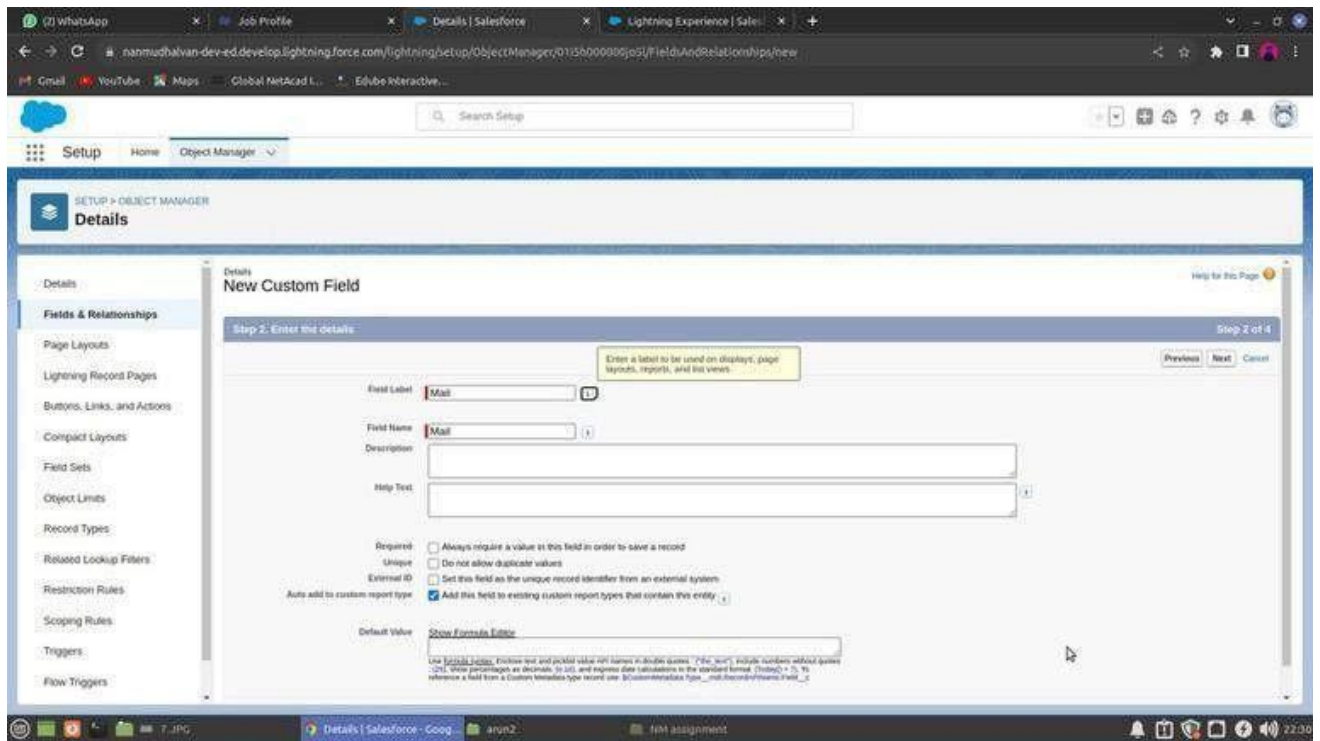
Allows users to enter any phone number. Automatically formats it as a phone number.

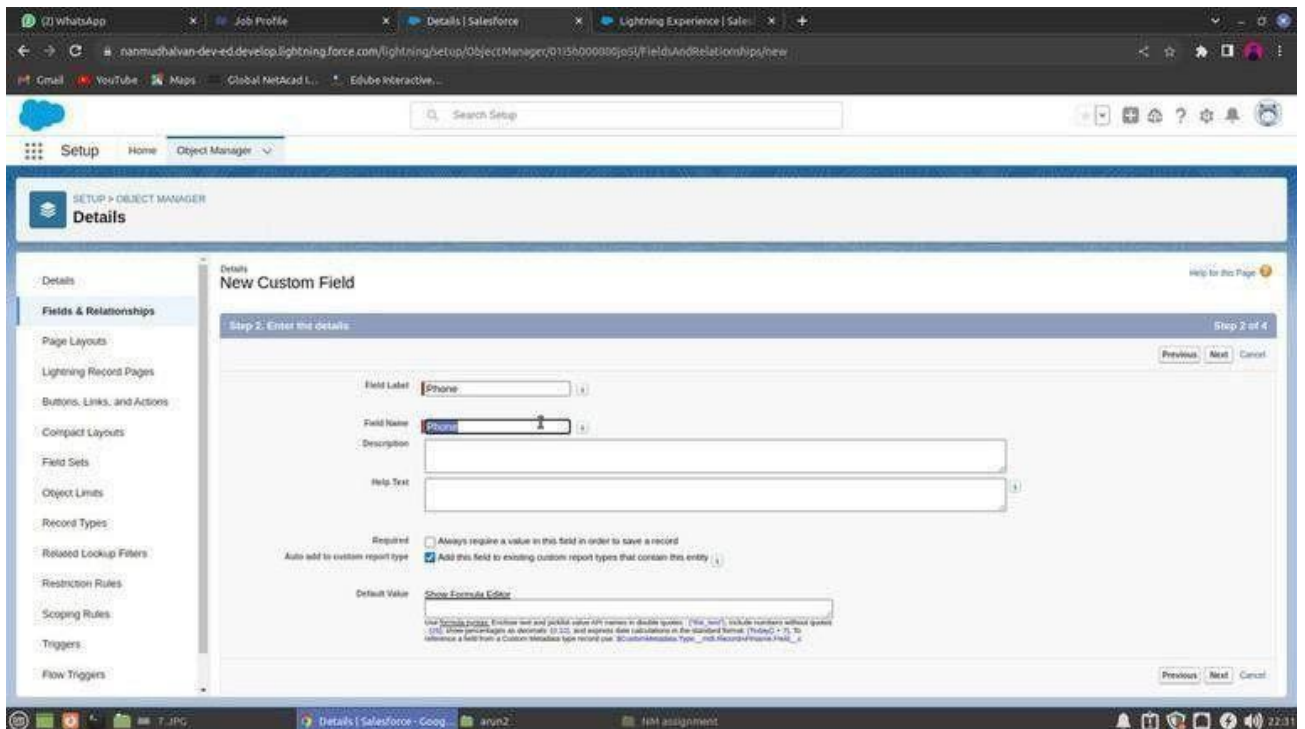
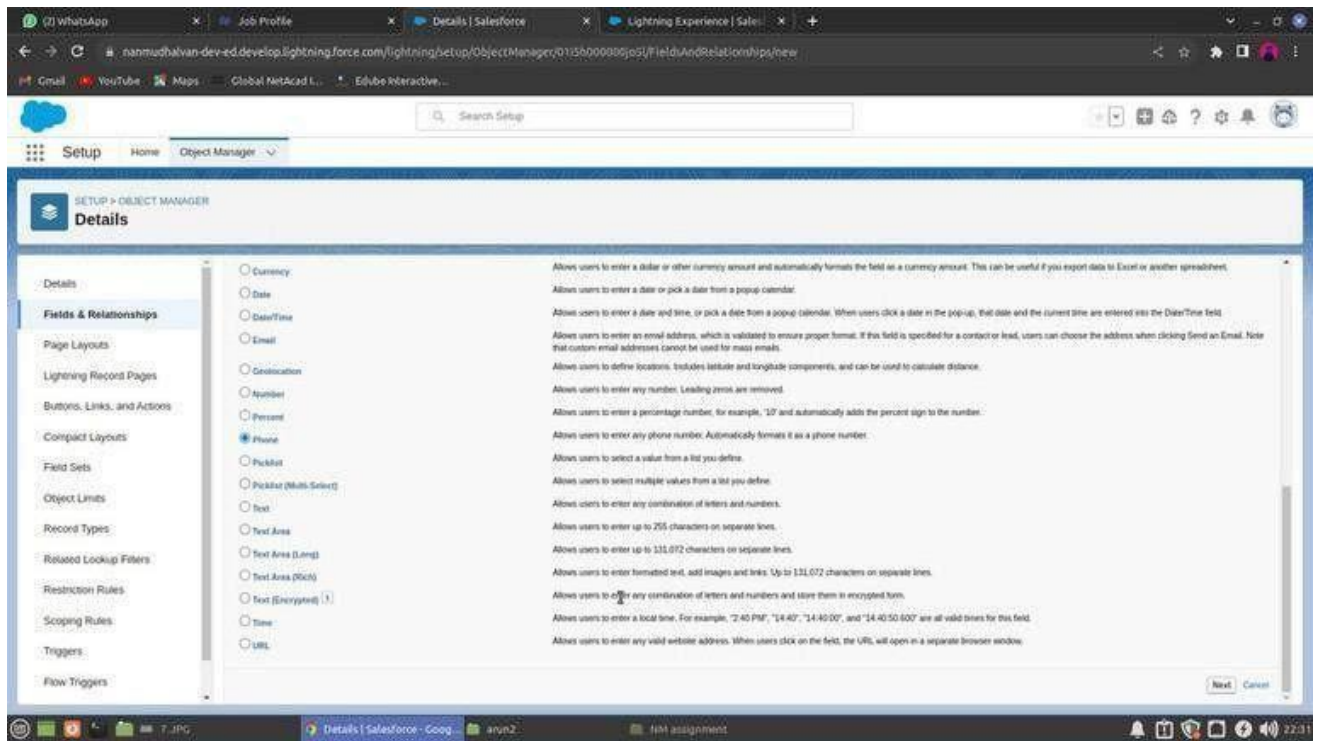
Allows users to select a value from a list you define.

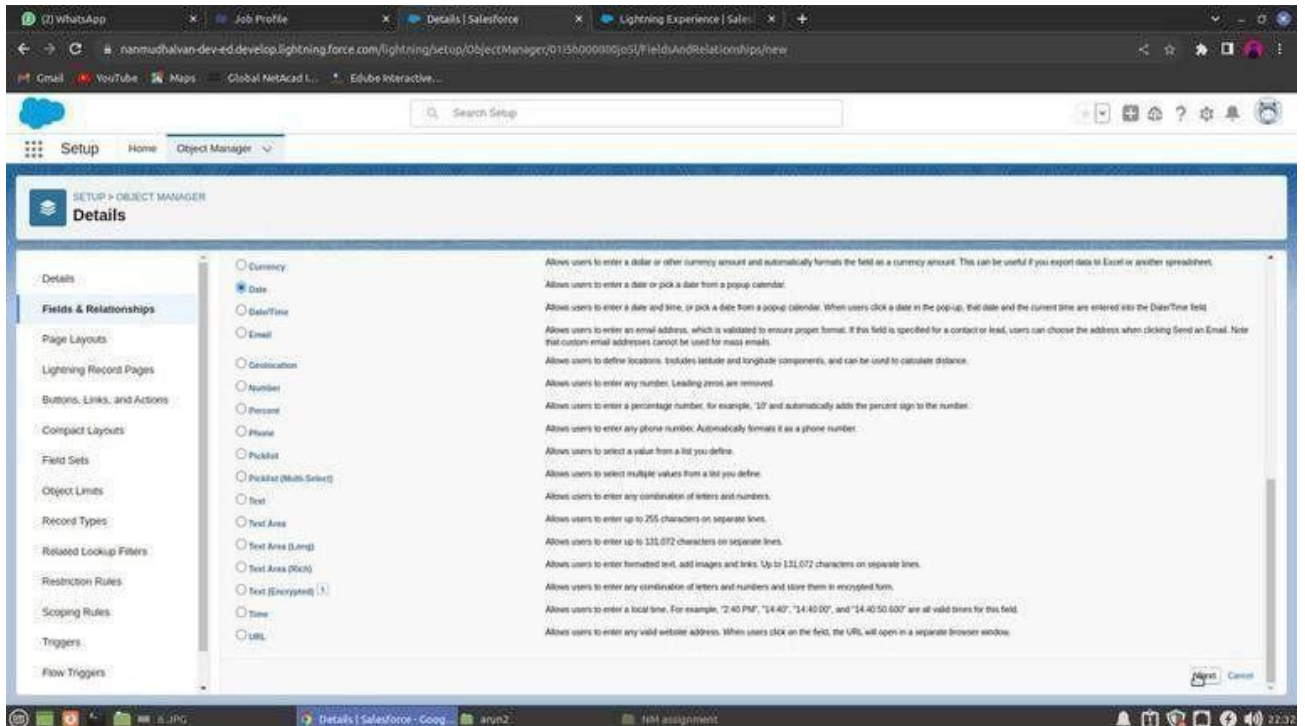
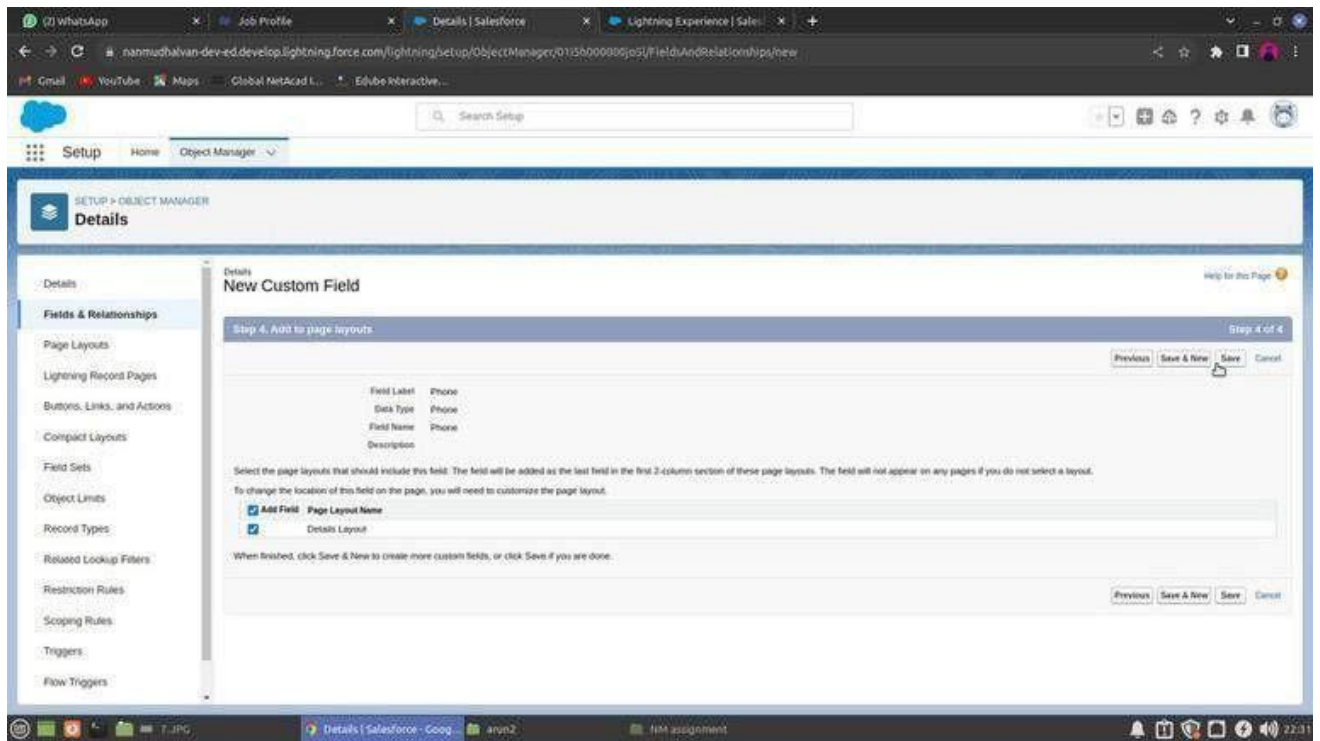
Allows users to select multiple values from a list you define.

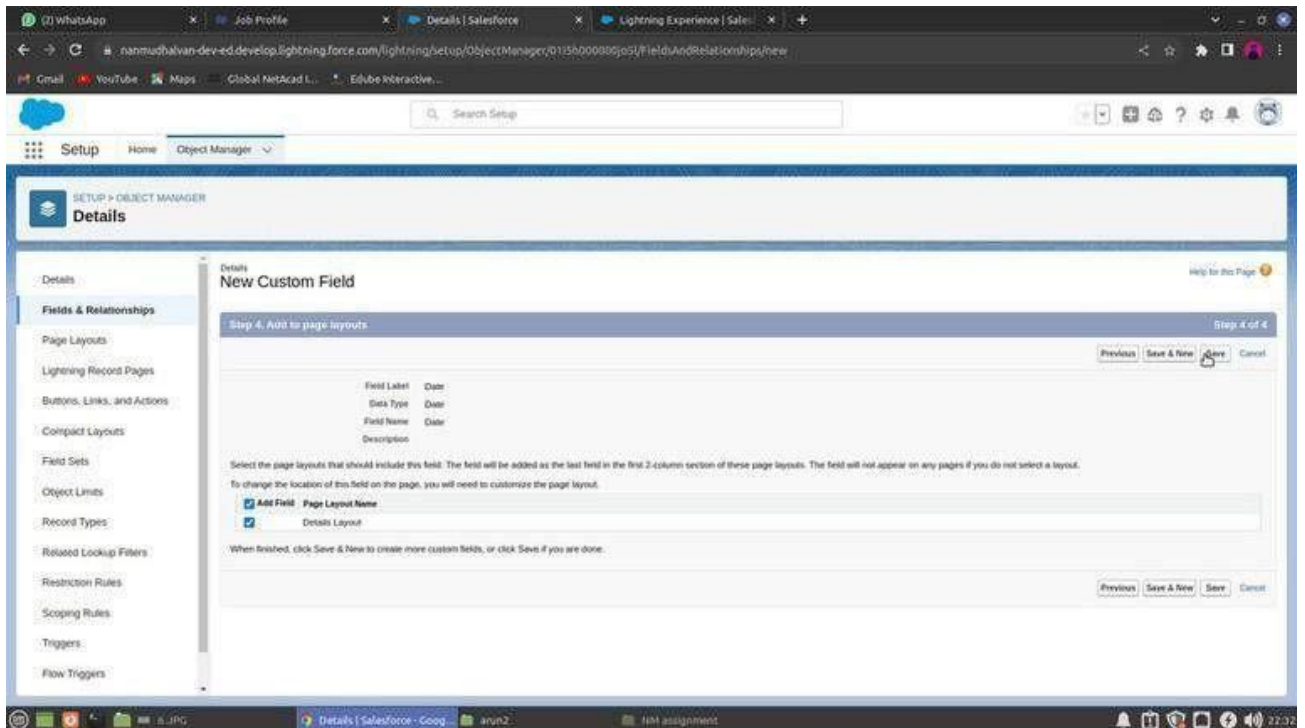
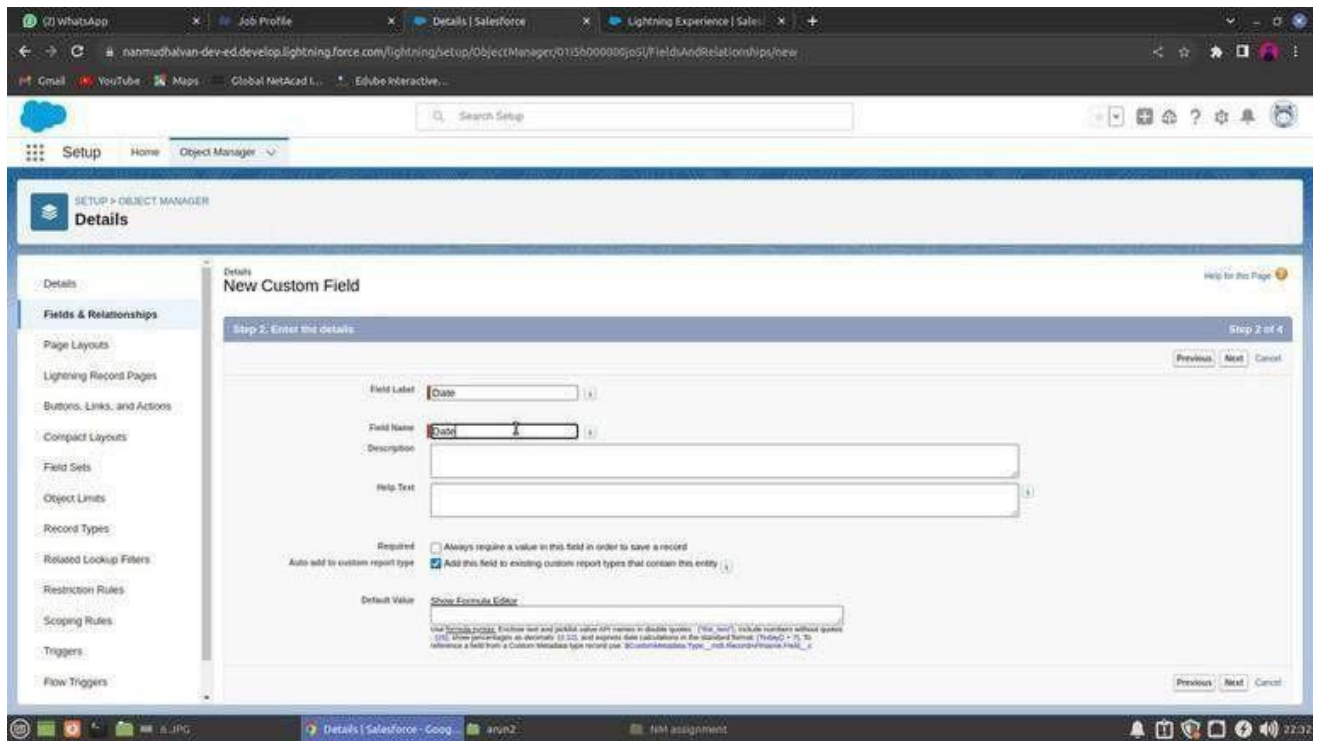
Allows users to enter any combination of letters and numbers.

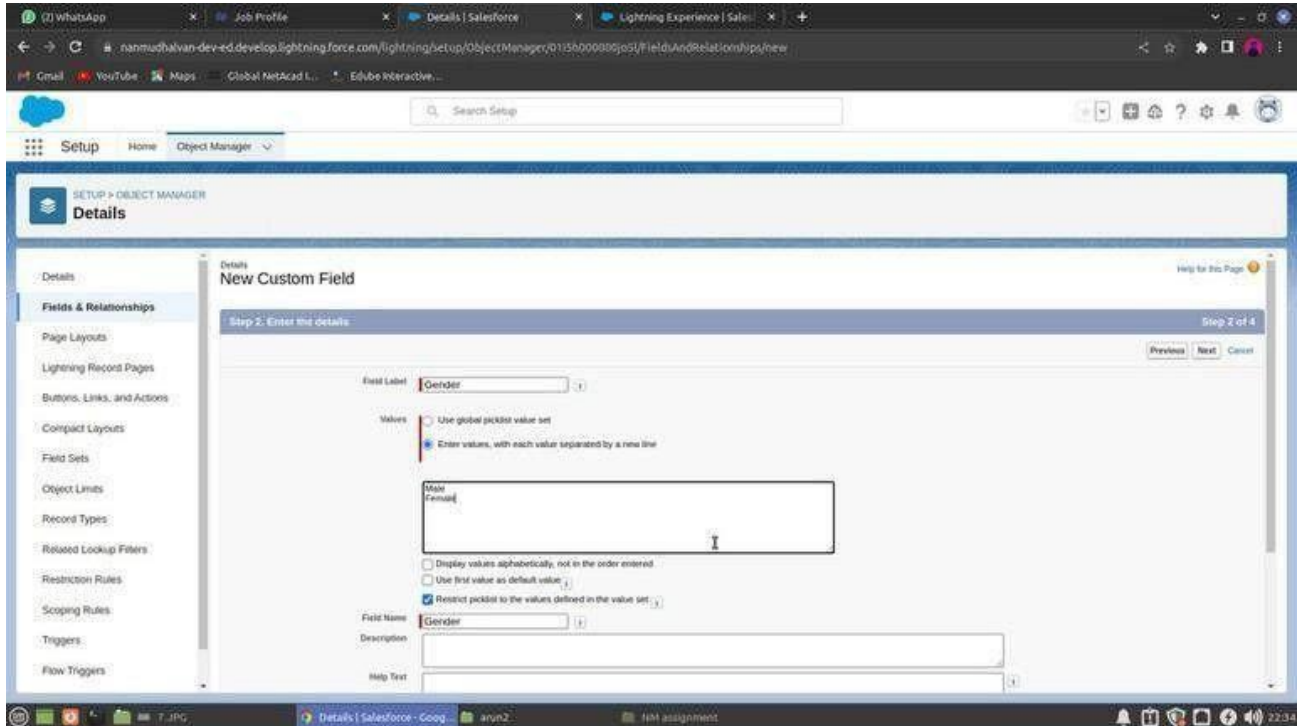
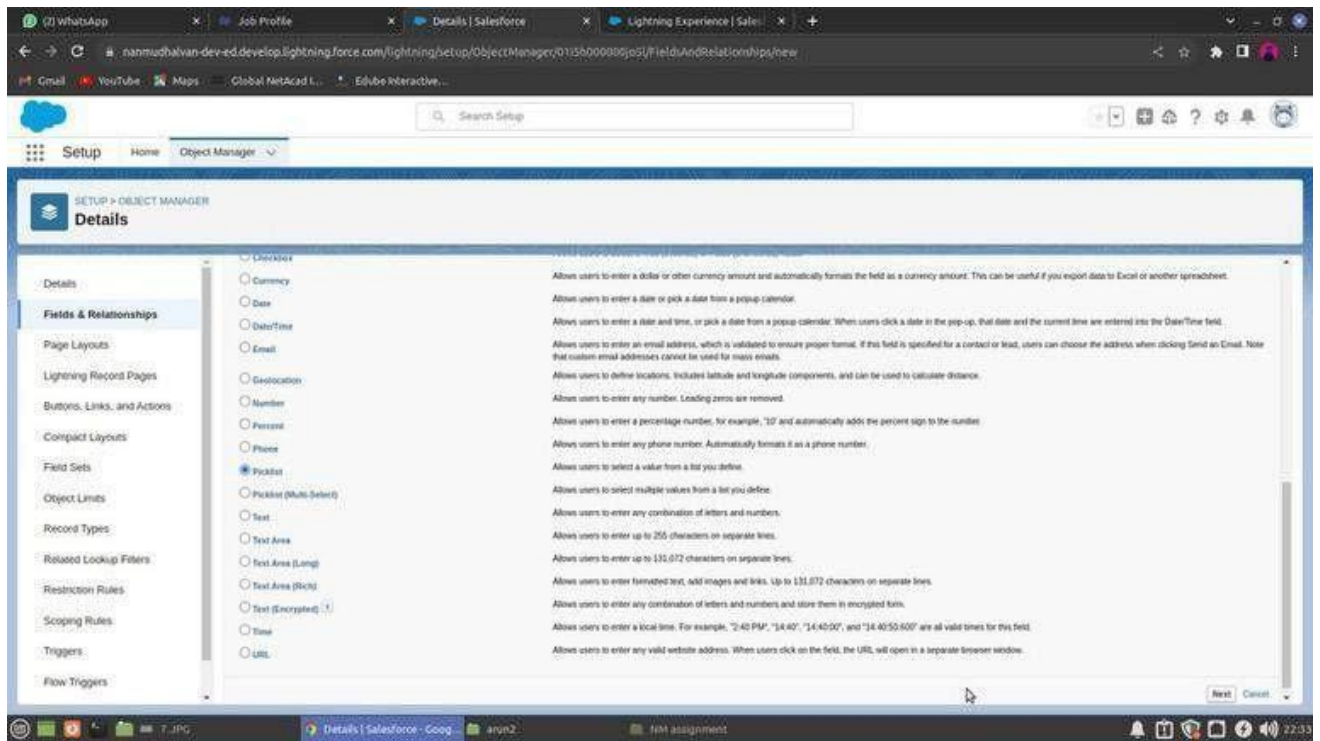
Details | Salesforce - Coog... | anur2... | 22:30

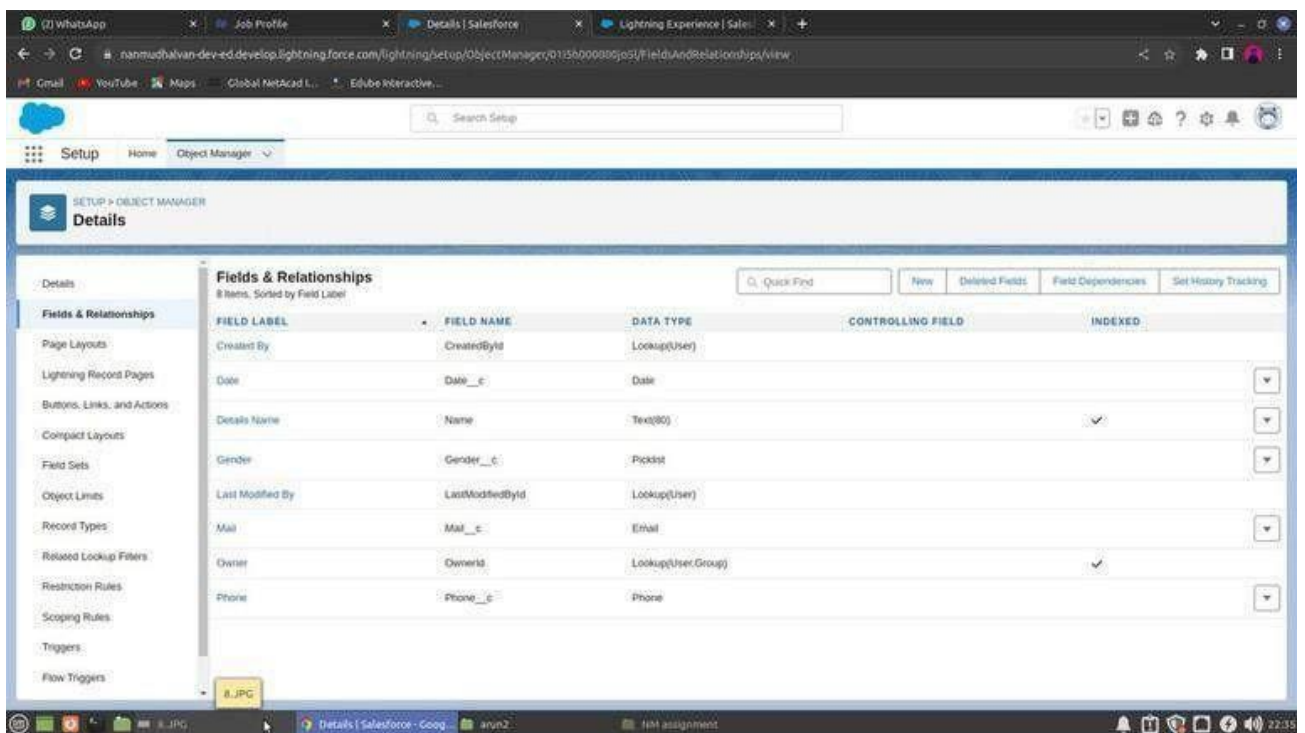
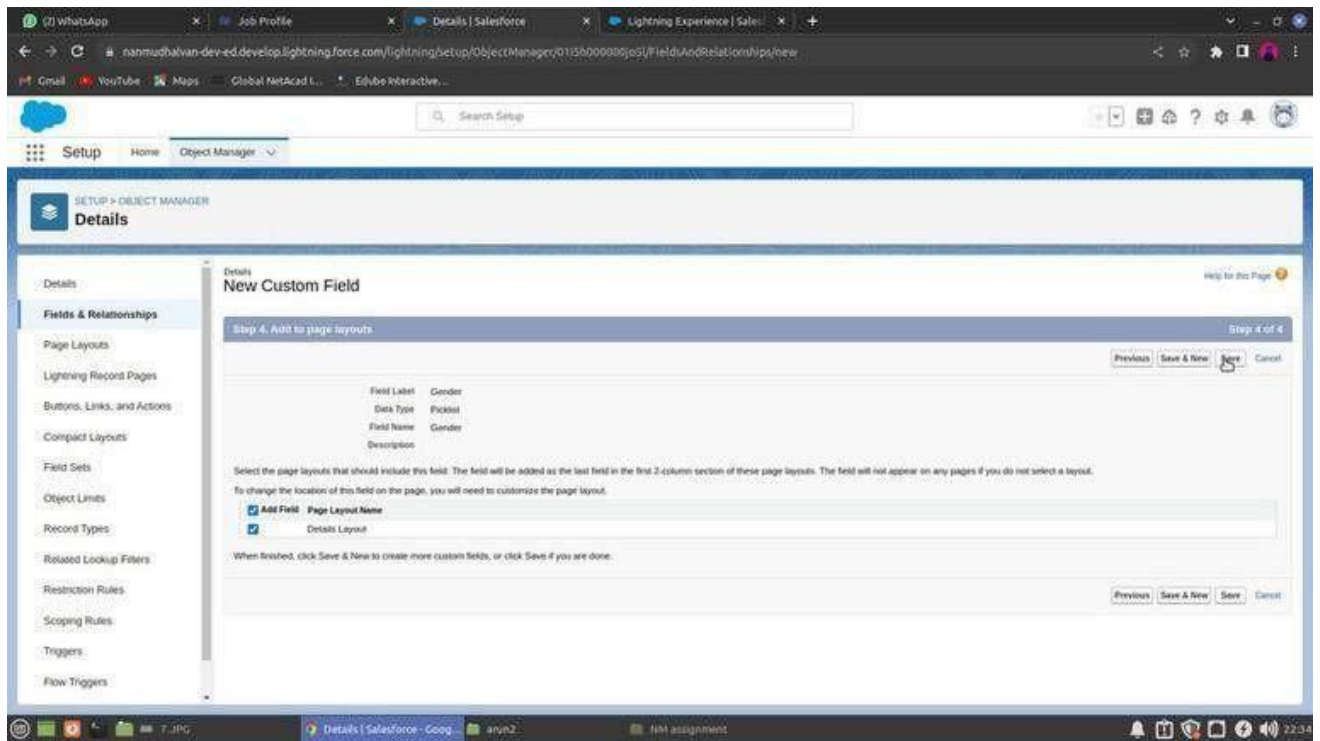


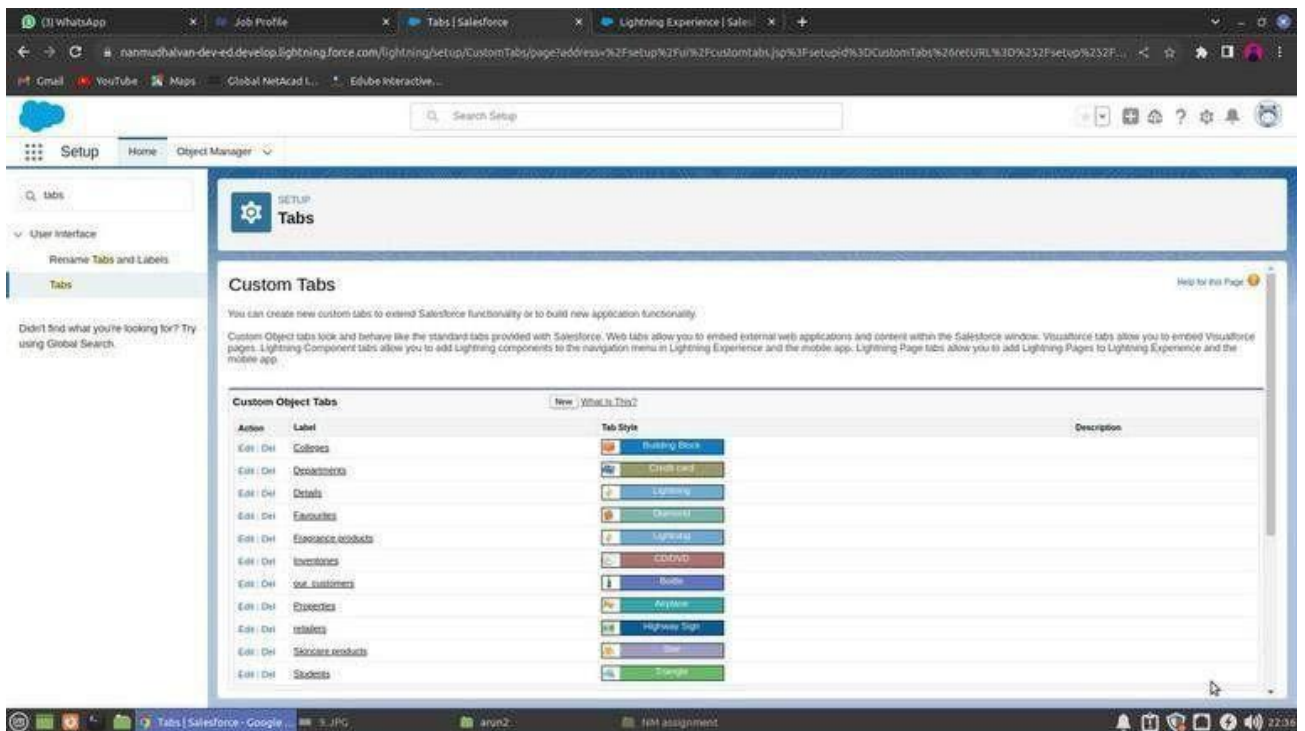
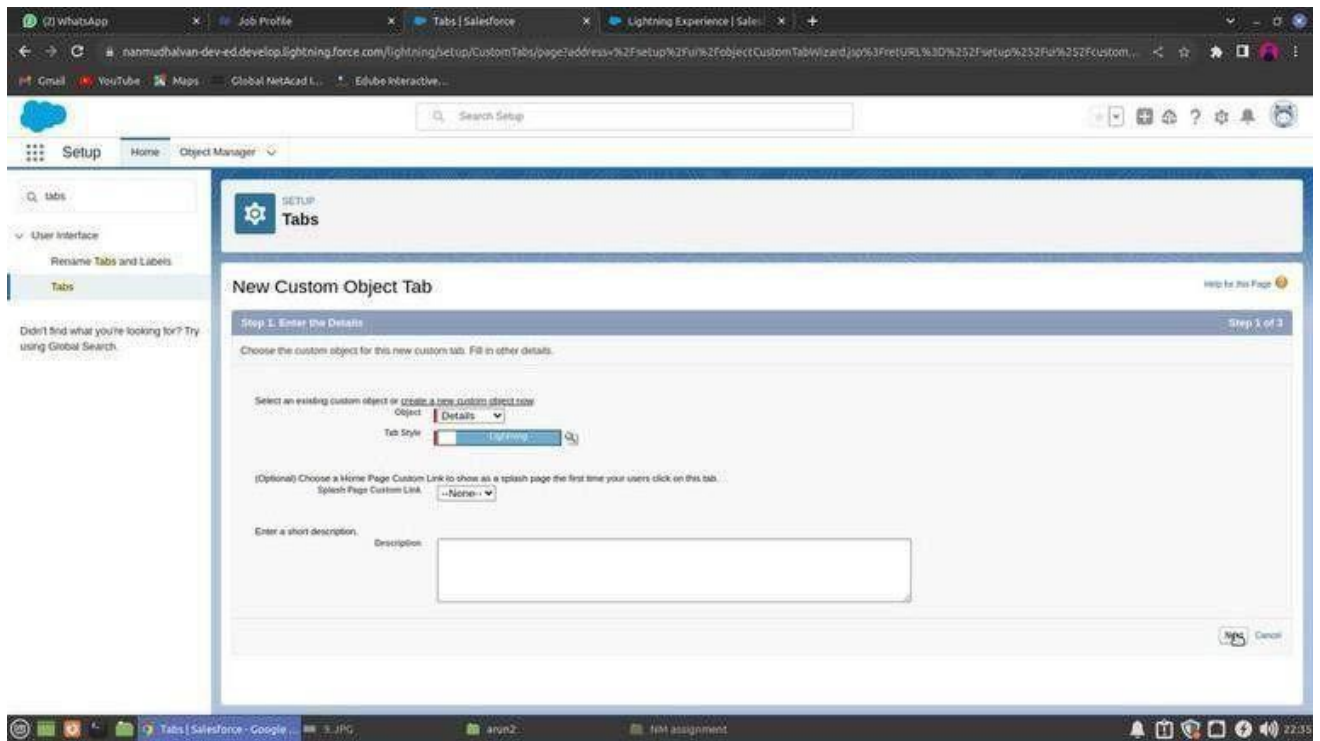












Setup

Flow

Apps

Lightning Bolt

Process Automation

Automation Home (Beta)

Exits

Migrate to Flow

Paused And Failed Flow

Interviews

Process Builder

Workflow Actions

Email Alerts

Field Updates

Outbound Messages

Send Actions

Tasks

Workflow Rules

Environments

Monitoring

SETUP

Flows

Flow Definitions

All Flows

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

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

Flow Builder

New Flow

Core All + Templates

Screen Flow

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

Record-Triggered Flow

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

Schedule-Triggered Flow

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

Platform Event—Triggered Flow

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

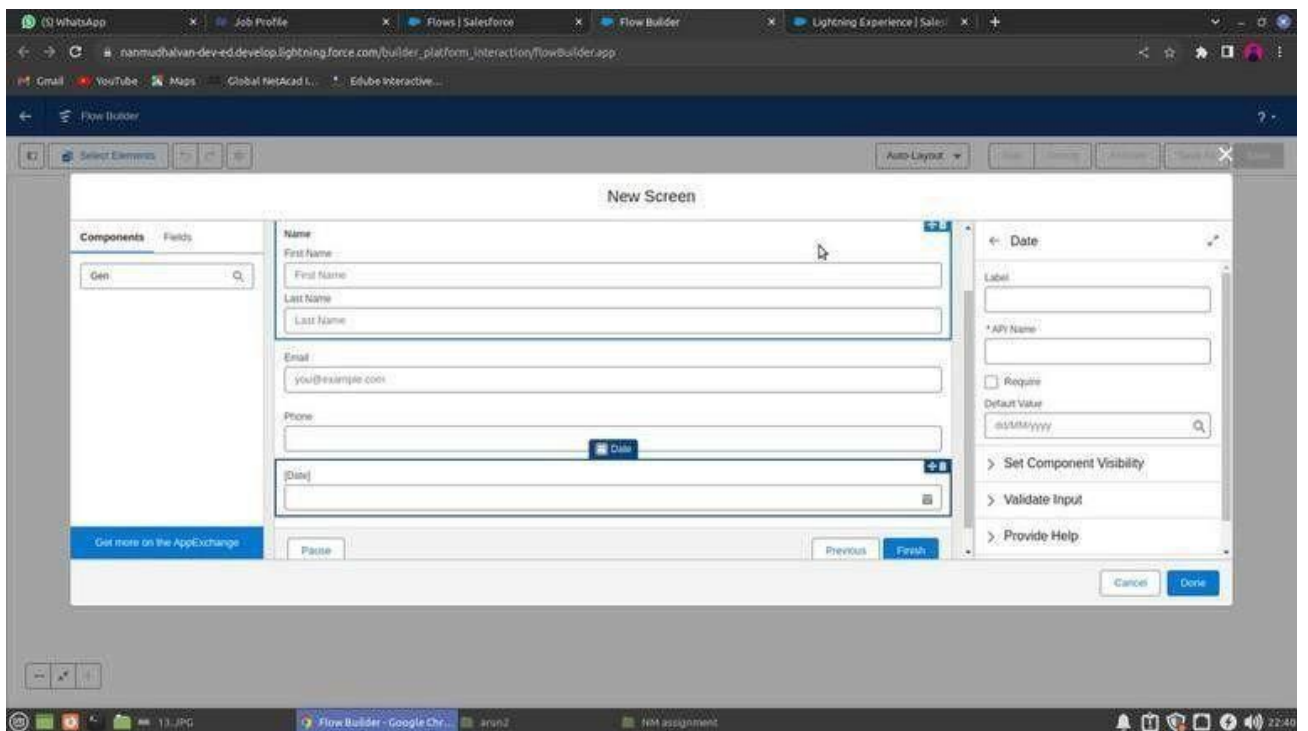
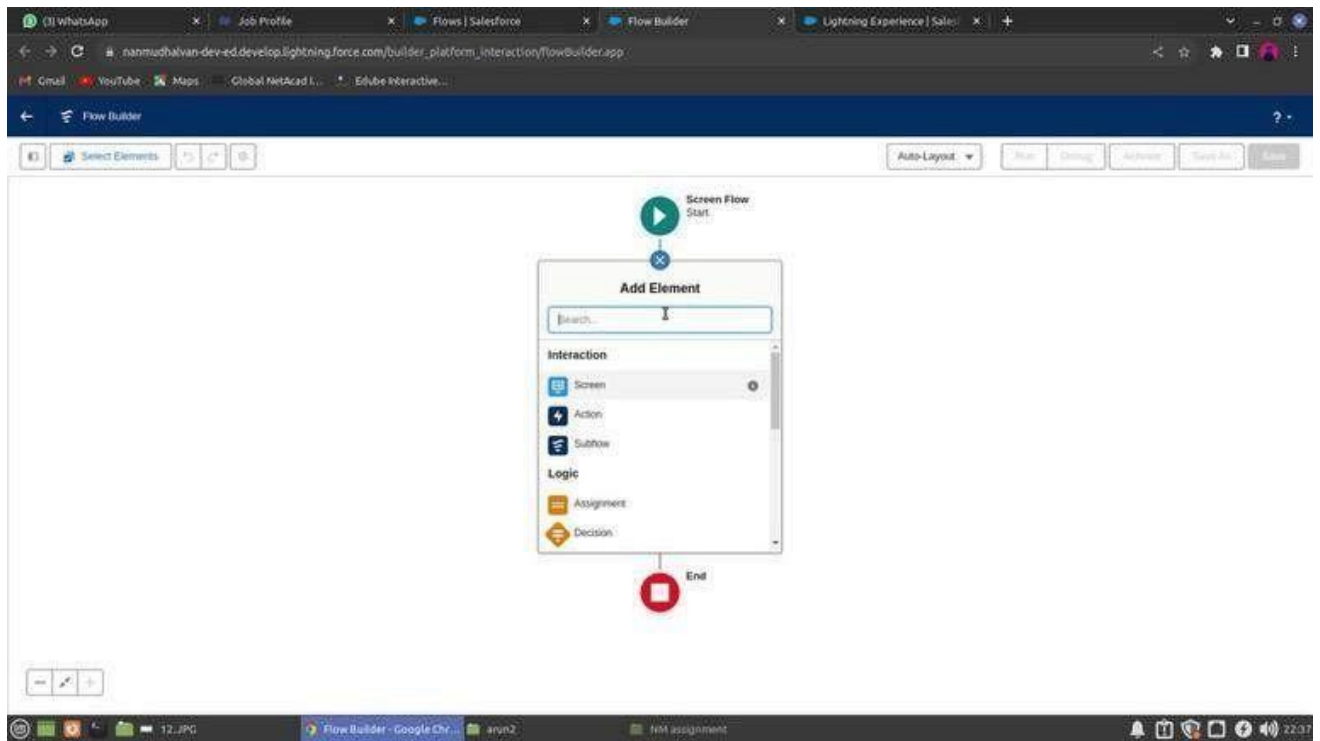
Autolaunched Flow (No Trigger)

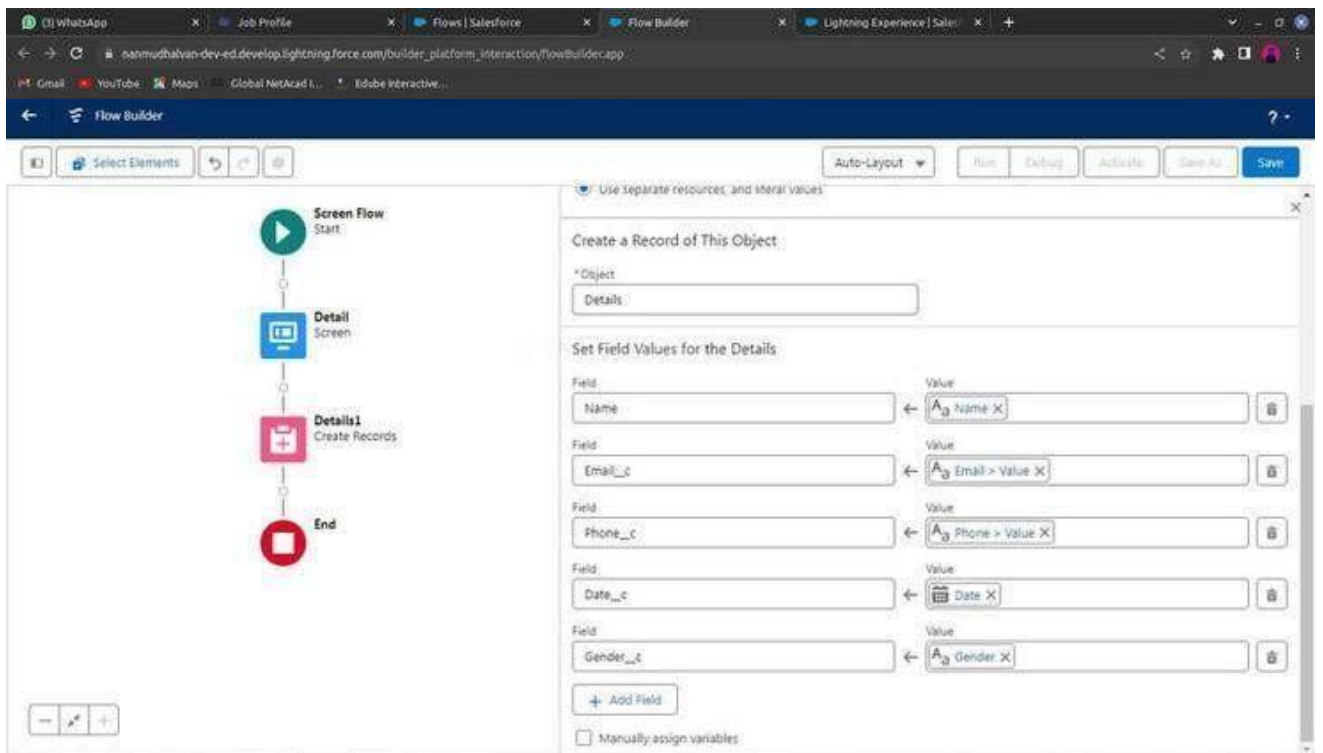
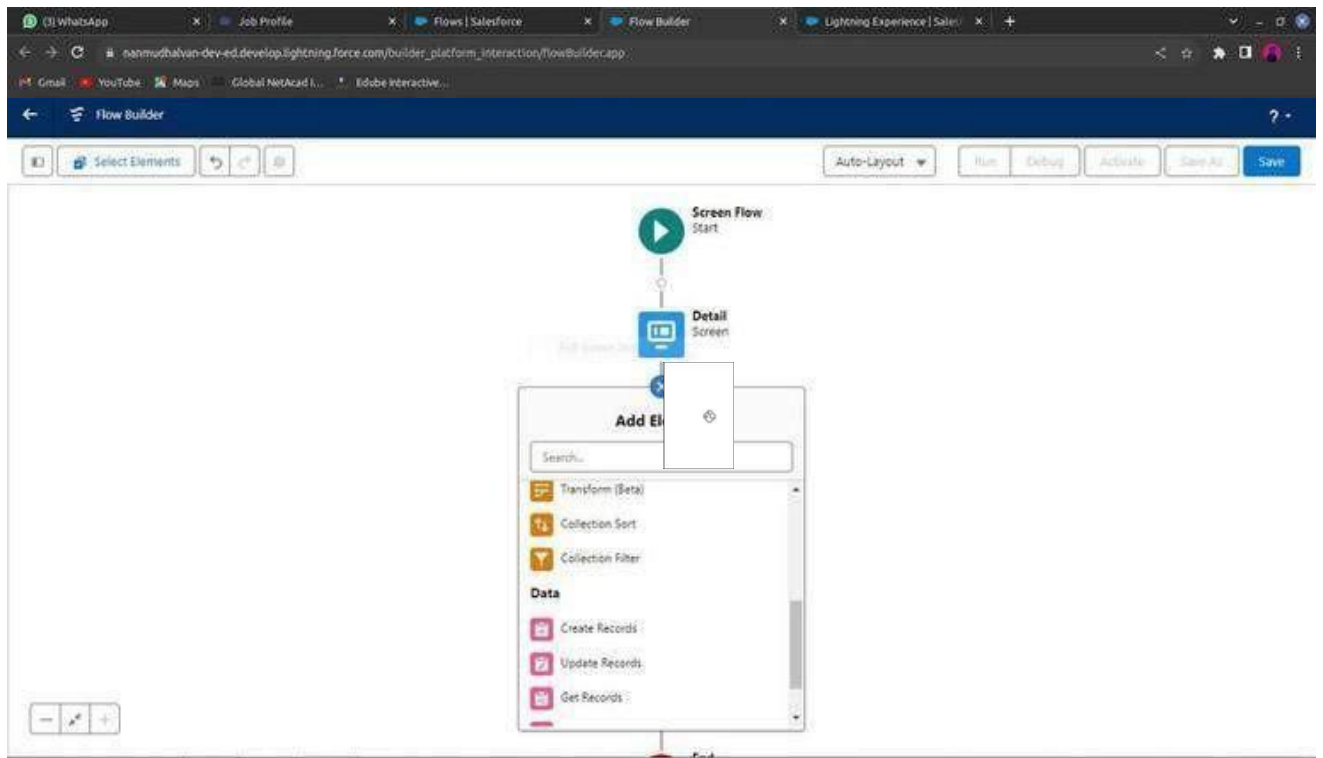
Launches when invoked by Apex, processes, REST API, and more. This autolaunched flow runs in the background.

Record-Triggered Orchestration

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

Create





details

Name

sathishkumar

Email

sathishsk2003@gmail.com

Phone

6369914154

Date

22-Sept-2002

Gender

male

Next



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

Email

sathishsk2003@gmail.com

Phone

6369914154

Date

22/09/2002

Gender

Male

Owner

SATHISH KUMAR S

Created By

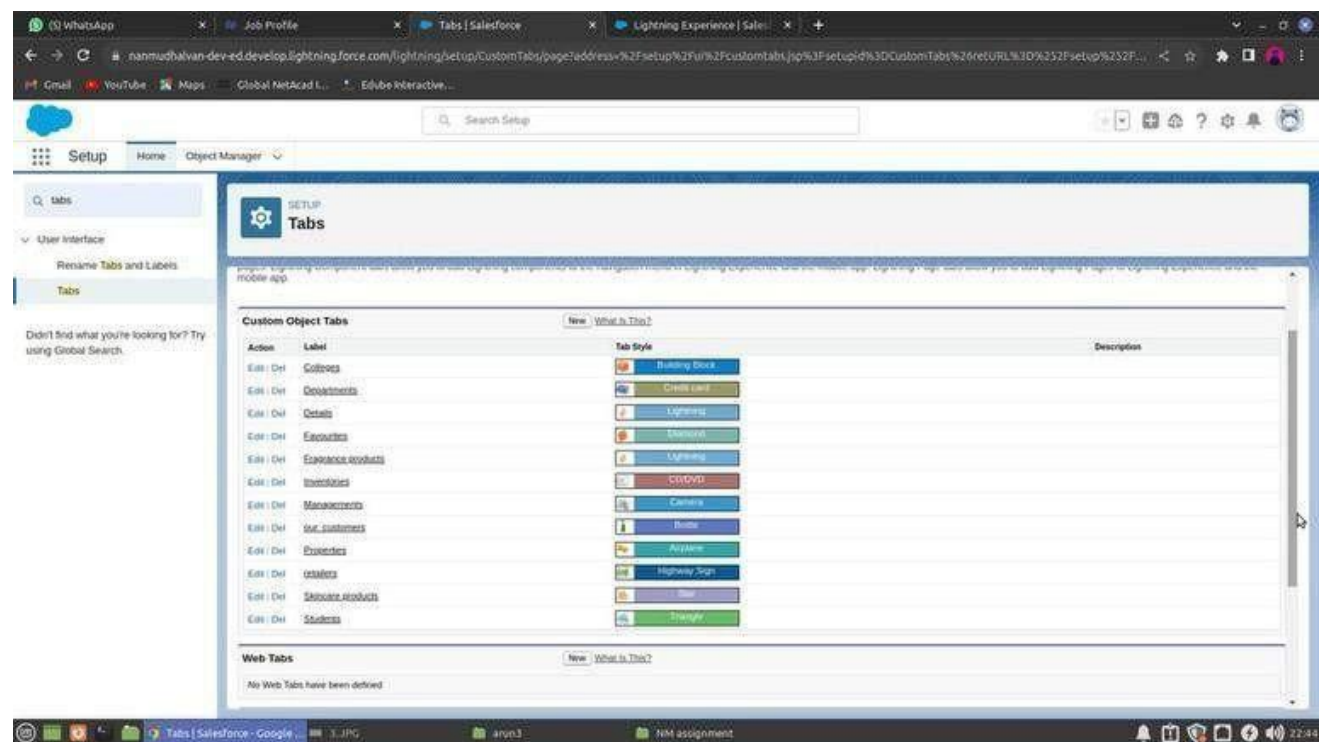
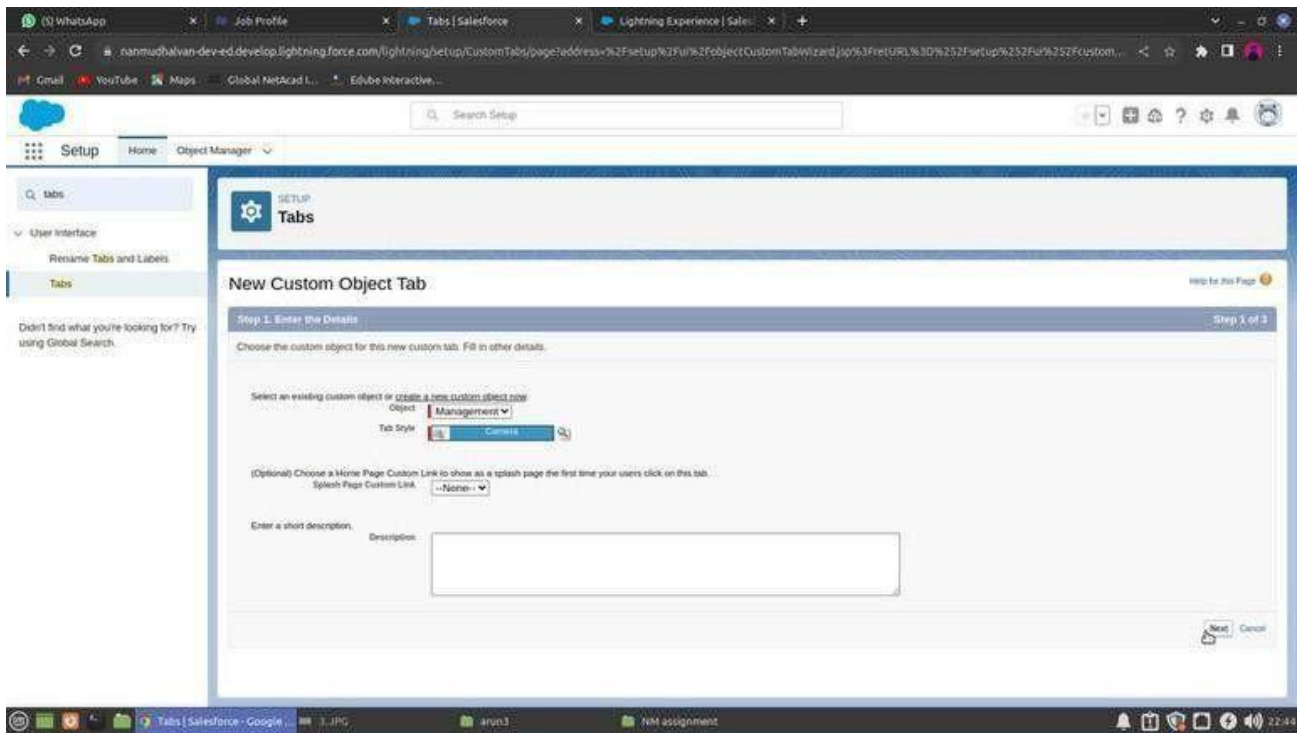
SATHISH KUMAR S, 28/10/2023, 6:50 pm

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.

The screenshot shows the Salesforce 'New Custom Object' setup page. The browser tabs include WhatsApp, Job Profile, New Custom Object | Sales, and Lightning Experience | Sales. The address bar shows the URL: nanmughalvan-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new. The page title is 'New Custom Object'. A yellow banner at the top states: 'Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Get more info](#) [Get a tour of this metadata editor](#)'. Below this is the 'Custom Object Definition Edit' section with 'Save', 'Save & New', and 'Cancel' buttons. The 'Custom Object Information' section includes fields for 'Label' (Example: Account), 'Plural Label' (Example: Accounts), 'Starts with vowel sound' (checkbox), 'Object Name' (Example: Account), and 'Description'. At the bottom, there are 'Context-Sensitive Help Setting' options: 'Open the standard Salesforce.com Help & Training window' (selected) and 'Open a window using a Visualforce page'. A footer note states: 'The Record Name appears in page layouts, lists, links, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.'



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

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

Search: Search...

Navigation: My-app, Recently Viewed, College, Department, Details, Management

Management Recently Viewed

0 items • Updated a few seconds ago

Buttons: New, Import, Change Owner

Management Name

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

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

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

Search: Search Setup

Navigation: Setup, Home, Object Manager

Hyperforce Assistant

- Users
 - Profiles
- Data
 - Mass Transfer Approval Requests
- Feature Settings
 - Data.com
 - Prospector Preferences
 - Prospector Users
 - Functions
 - Marketing
 - Lead Processes
 - Sales
 - Products
 - Asset Settings

Setup Profiles

Profiles

All Profiles | Edit | Delete | Create New View

New Profile

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

14 of 6 | 0 Selected | 14 Previous Next >

Page 1 of 1

Setup | Home | Object Manager

Search Setup

Hyperforce Assistant

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Asset Settings

Profiles

Profile Edit Manager

Set the permissions and page layouts for this profile.

Profile Edit

Name: Manager

User License: Salesforce Platform

Description:

Custom Profile: ☒

Custom App Settings

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

Service Provider Access

Setup | Home | Object Manager

Search Setup

Hyperforce Assistant

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Mass Transfer Approval Requests

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Data.com

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Prospector Users

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Asset Settings

Profiles

Custom Object Permissions

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

Session Settings

Session Times Out After: 2 hours of inactivity

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

Password Policies

User passwords expire in: 90 days

Enforce password history: 3 passwords remembered

Minimum password length: 8

Setup | Home | Object Manager

Search Setup

Profiles

Profile: Manager

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information. If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Loon IP Range Access (2) | Enabled Apex Class Access (2) | Enabled Visualforce Page Access (2) | Enabled External Data Source Access (2) | Enabled Named Credential Access (2) | Enabled External Credential Provider Access (2) | Enabled Custom Metadata Type Access (2) | Enabled Custom Settings Definitions Access (2) | Enabled Flow Access (2) | Enabled Service Password Status Access (2) | Enabled Custom Permissions (2)

Profile Detail

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

Page Layouts

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

Setup | Home | Object Manager

Search Setup

Users

New User

User Edit

General Information

First Name	manager	Role	Marketing Team
Last Name	1	User License	Salesforce Platform
Alias	m1	Profile	Manager
Email	manager.aaa@gmail.com	Active	<input checked="" type="checkbox"/>
Username	manager.aaa@gmail.com	Marketing User	<input type="checkbox"/>
Nickname	User1097624338709764377	Offline User	<input type="checkbox"/>
Title		Knowledge User	<input type="checkbox"/>
Company		Flow User	<input type="checkbox"/>
Department		Service Cloud User	<input type="checkbox"/>
Division		Site.com Contributor User	<input type="checkbox"/>
		Site.com Publisher User	<input type="checkbox"/>
		WDC User	<input type="checkbox"/>

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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

Help for this Page

User Edit Save Save & New Cancel

General Information

First Name: manager

Last Name: 2

Alias: m2

Email: managerxyz.xyz@gmail.com

Username: managerxyz.xyz@gmail.com

Nickname: User1697624453759508865

Title:

Company:

Department:

Division:

Role: Marketing Team

User License: Salesforce

Profile: Solution Manager

Active: ☒

Marketing User: ☐

Offline User: ☐

Knowledge User: ☐

Flow User: ☐

Service Cloud User: ☐

Site.com Contributor User: ☐

Site.com Publisher User: ☐

WDC User: ☐

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

Search Setup

Setup Home Object Manager

per

Hyperforce Assistant

Lightning Experience Transition Assistant

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Permission Set Groups

Permission Sets

Feature Settings

Digital Experiences

Settings

Functions

Sales

Accounts

Person Accounts

Salesforce Scheduler

Assignment Policies

Salesforce Scheduler

SETUP Permission Sets

Permission Sets

Help for this Page

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

All Permission Sets Edit Delete Create New View

New

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

1-25 of 30 0 Selected 0 4 Previous Next Page 1 of 2

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

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Search Setup

Setup Home Object Manager

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Assignment Policies
Salesforce Scheduler

SETUP Permission Sets

manager12 [Click screen help](#) [Video Tutorial | Help for this Page](#)

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

Permission Set Overview

Description		API Name	manager12
License		Namespace Prefix	
Session Activation Required	<input type="checkbox"/>	Created By	admin, 10/10/2023, 3:52 pm
Permission Set Groups Added To	0	Last Modified By	admin, 10/10/2023, 3:52 pm

Apps

Assigned Area
Settings that specify which apps are visible in the app menu

Assigned Connected Area
Settings that specify which connected apps are visible in the app menu

Object Settings
Permissions to access objects and fields, and settings such as tab availability

App Permissions
Permissions to perform app-specific actions, such as "Manage Call Centers"

Apex Class Access

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

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Search Setup

Setup Home Object Manager

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Assignment Policies
Salesforce Scheduler

SETUP Permission Sets

manager12 [Click screen help](#) [Video Tutorial | Help for this Page](#)

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

Permission Set Overview Object Settings Accounts

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

Setup Home Object Manager

Search Setup

Users

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

Feature Settings

- Data.com
 - Prospector Users
- Service
 - Embedded Service
 - Messaging for In-App and Web User Verification
- User Interface
 - Action Link Templates

All Users

1 item selected

Search this list...

	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Chatter Expert	Chatter	chatty.00d5j00000ciqpaev.ktx1n04y2af@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	Consumer 5	c5	cons5@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Consumer
<input type="checkbox"/>	Integration User	integ	integration@00d5j00000ciqpaev.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input checked="" type="checkbox"/>	Manager 1	m1	sathish11@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Manager
<input type="checkbox"/>	Manager 2	m2	manager221@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Solution Manager
<input type="checkbox"/>	Provider 1	p1	sathiskumar5100@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Provider
<input type="checkbox"/>	SATHISH KUMAR S	SS	sathishkumar103@gmail.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Security User	sec	insightssecurity@00d5j00000ciqpaev.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

Cancel Next

Setup Home Object Manager

Search Setup

Hyperforce Assistant

Lightning Experience Transition Assistant

Users

- Permission Set Groups
- Permission Sets

Feature Settings

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

Select an Expiration Option For Assigned Users

☒ No expiration date

☐ Specify the expiration date

1 Day 1 Week 30 Days 60 Days Custom Date

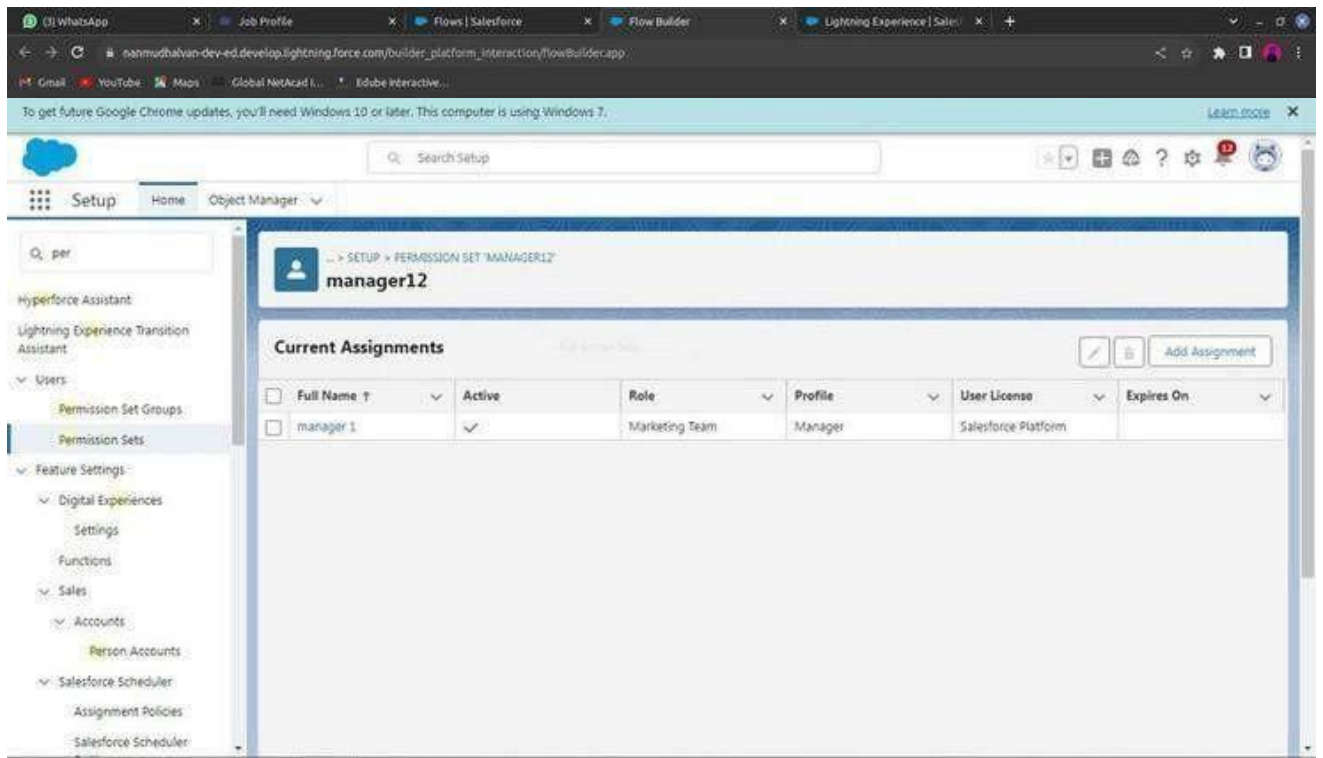
Time Zone

Select a time zone...

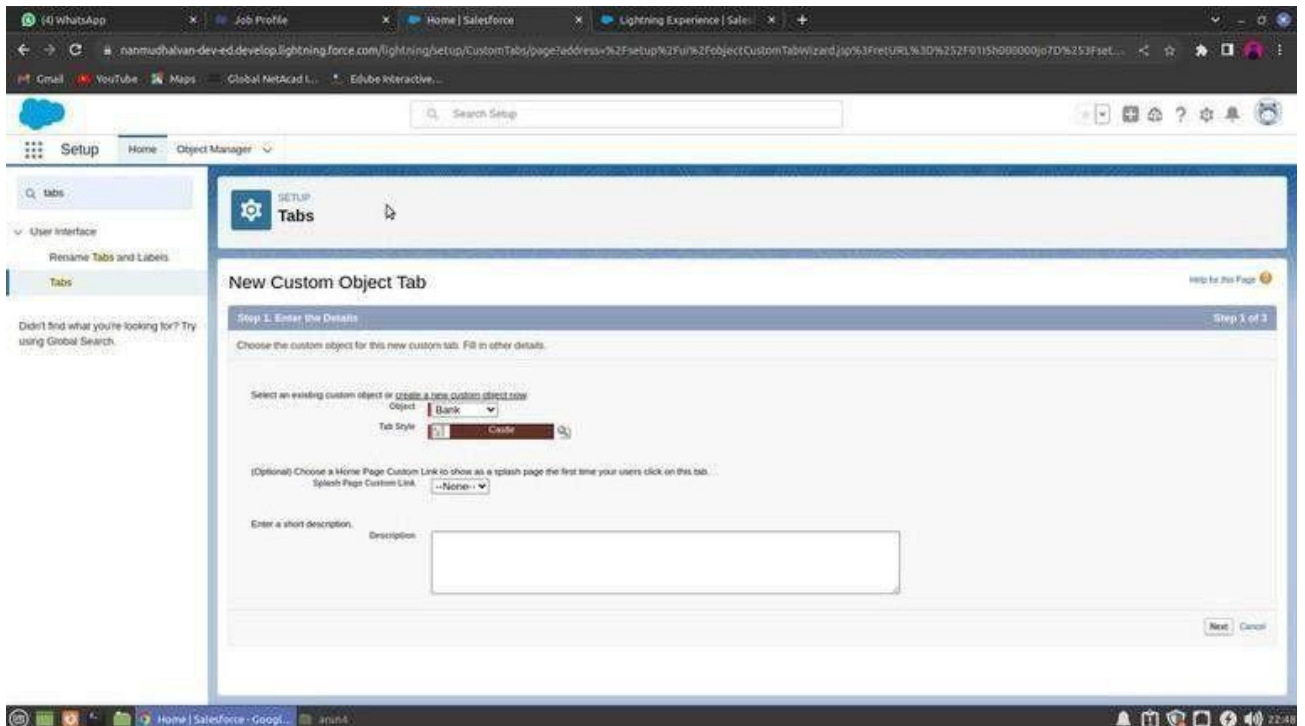
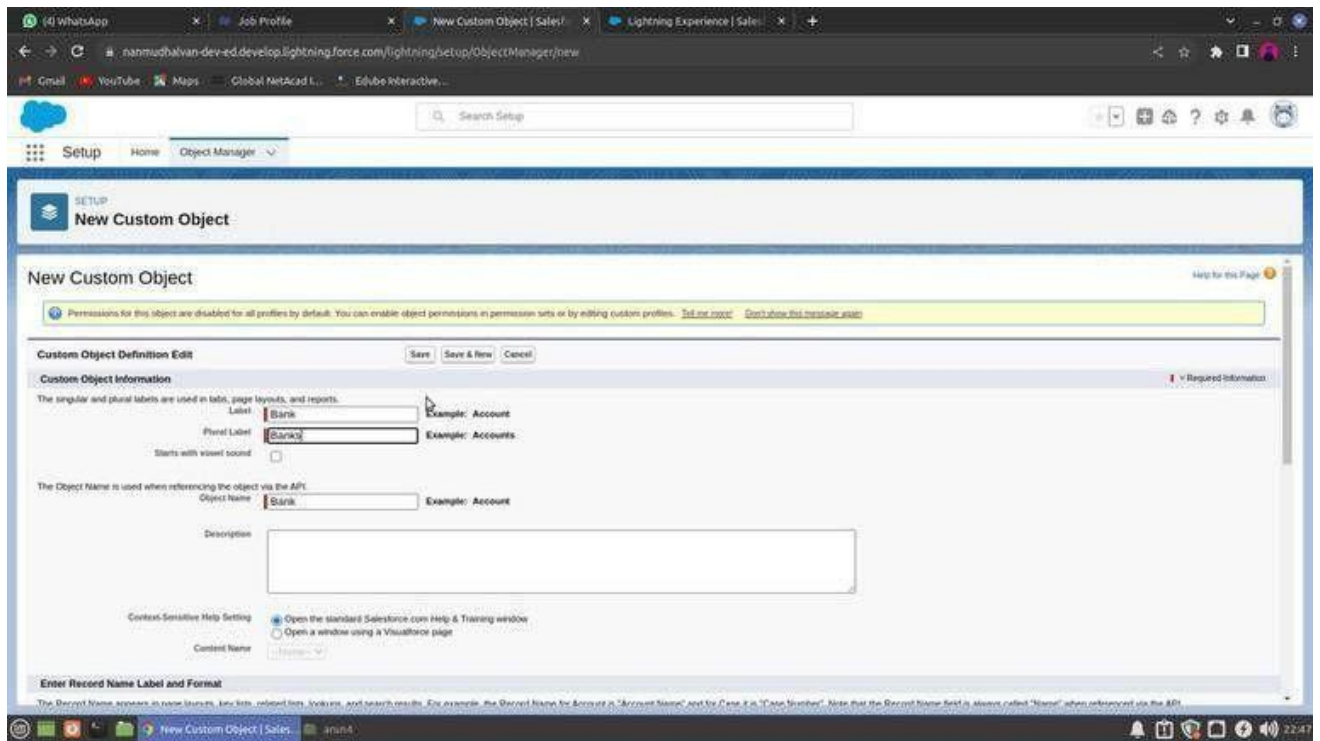
Selected Users

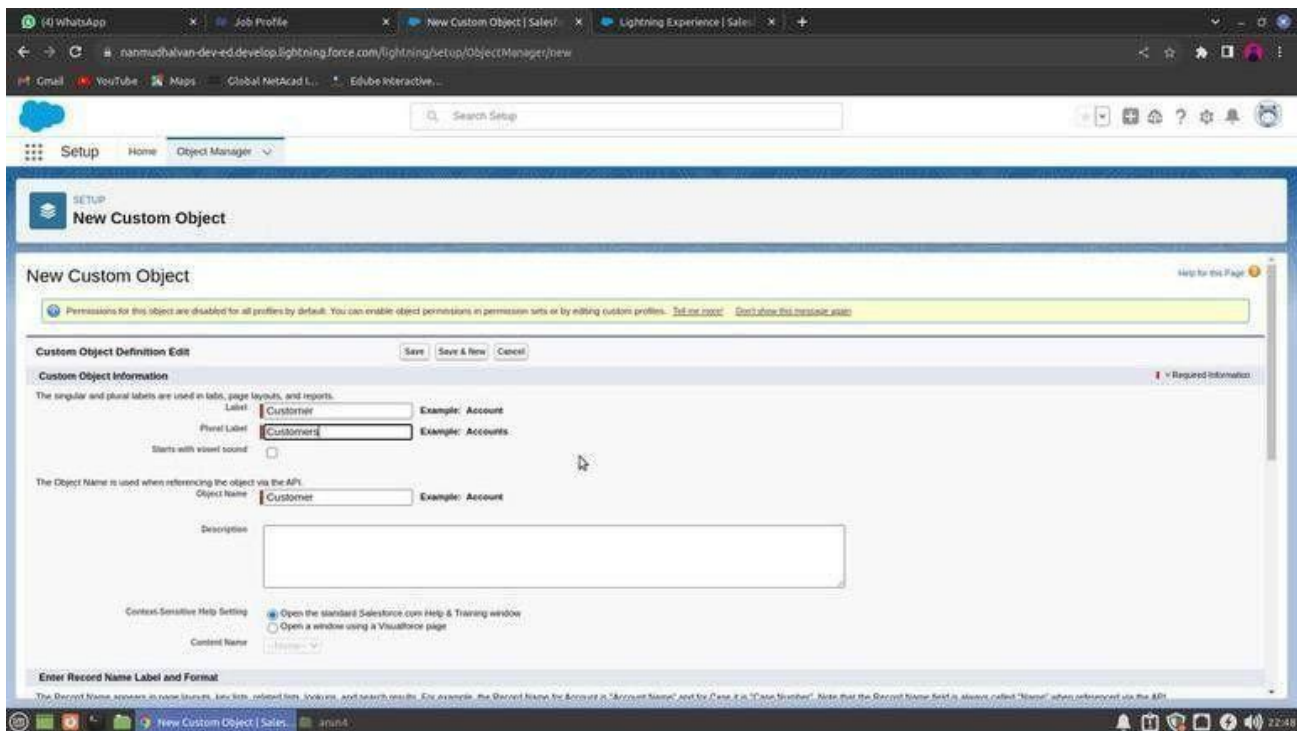
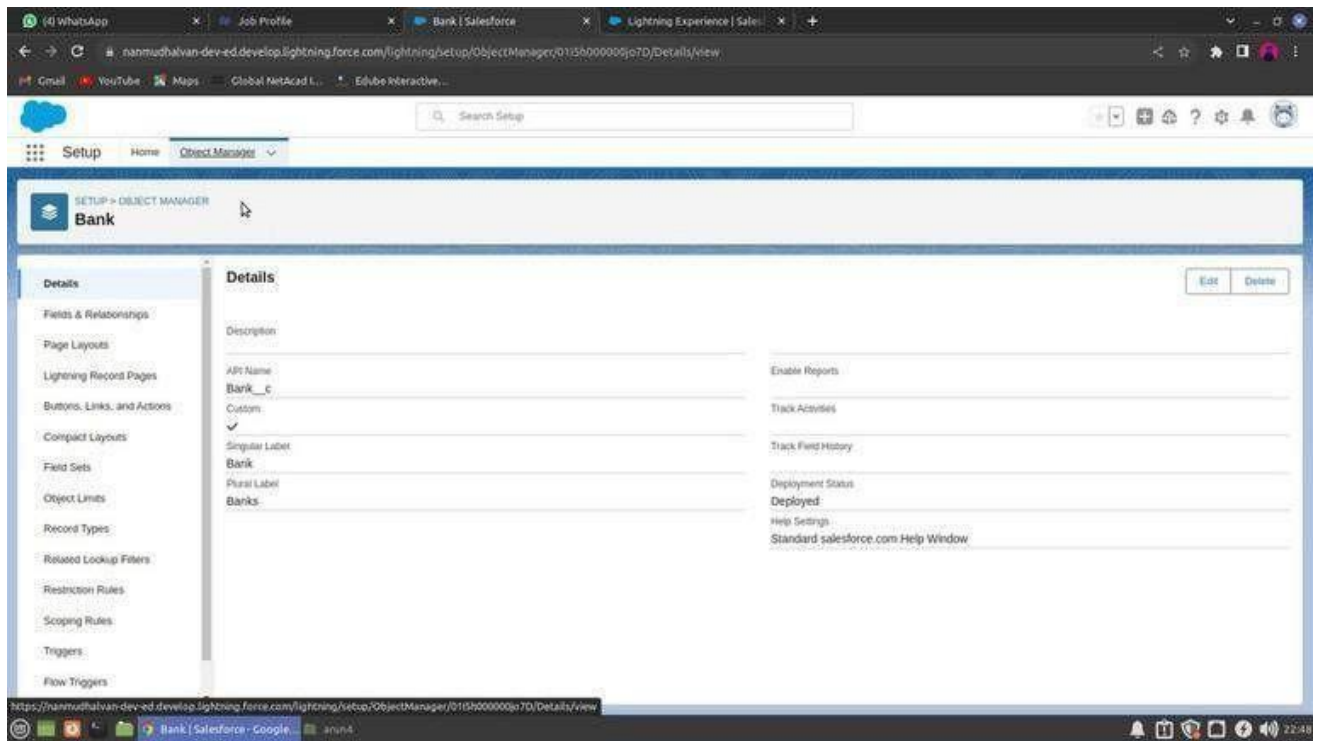
Full Name	Role	Profile	Active	User License	Expires On
manager 1	Marketing Team	Manager	<input checked="" type="checkbox"/>	Salesforce Platform	Never Expires

Cancel Back Assign



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





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Search Setup

Setup Home Object Manager

Customer

Details:

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

Subprocess Page

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

Data Type

None Selected Select one of the data types below.

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

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

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

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

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

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

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

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

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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

Customer

Details:

- Fields & Relationships
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- Buttons, Links, and Actions
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- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Restriction Rules

Customer New Relationship

Step 6 of 6: Add custom related lists

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

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

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

Add Related List Page Layout Name
Bank Layout

Append related list to users' existing personal customizations

Previous Save & New Save Cancel



Profiles

Profile: Standard Platform User

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

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

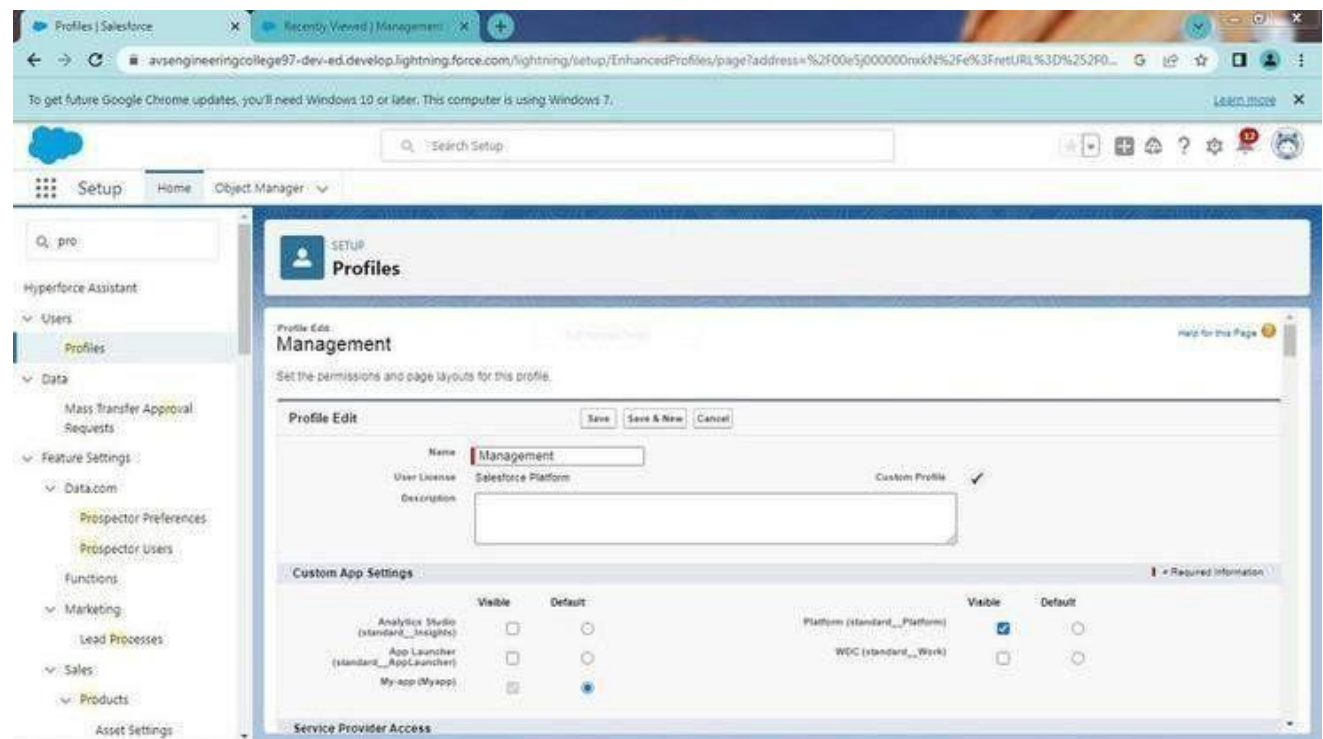
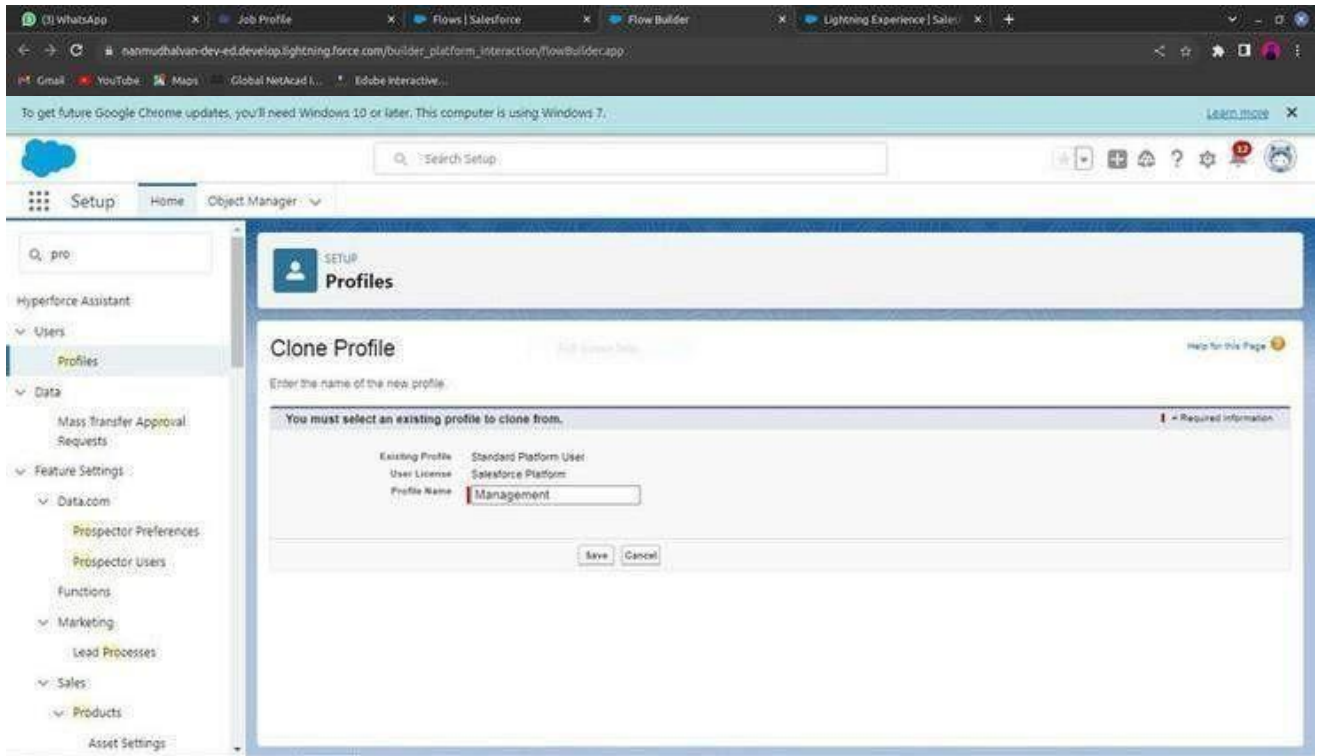
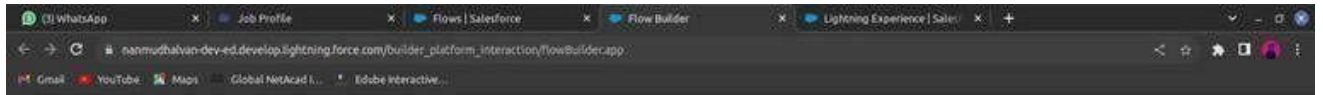
[Login IP Ranges](#) | [Enabled Flow Class Access](#) | [Enabled Validation Rule Access](#) | [Enabled External Data Source Access](#) | [Enabled Named Credential Access](#) | [Enabled External Credential Provider Access](#) | [Enabled Custom Metadata Type Access](#) | [Enabled Custom Setup Definition Access](#) | [Enabled Form Access](#) | [Enabled Service Presence Status Access](#) | [Enabled Custom Permissions](#)

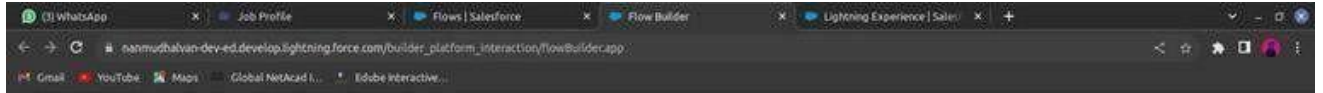
Profile Detail

Name	Standard Platform User	Custom Profile	
User License	Salesforce Platform		
Created By	salesforce.com, inc. 17/10/2023, 10:41 am	Modified By	Admin 16/10/2023, 3:34 pm

Page Layouts

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





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Search Setup

Setup Home Object Manager

Search: pro

Hyperforce Assistant

- Users
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- Data
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Profiles

Feature	Read	Create	Edit	Delete	View All	Modify All
Contact Point Consents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Emails	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Streaming Channels	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
User External Credentials	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Custom Object Permissions

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

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

Session Settings

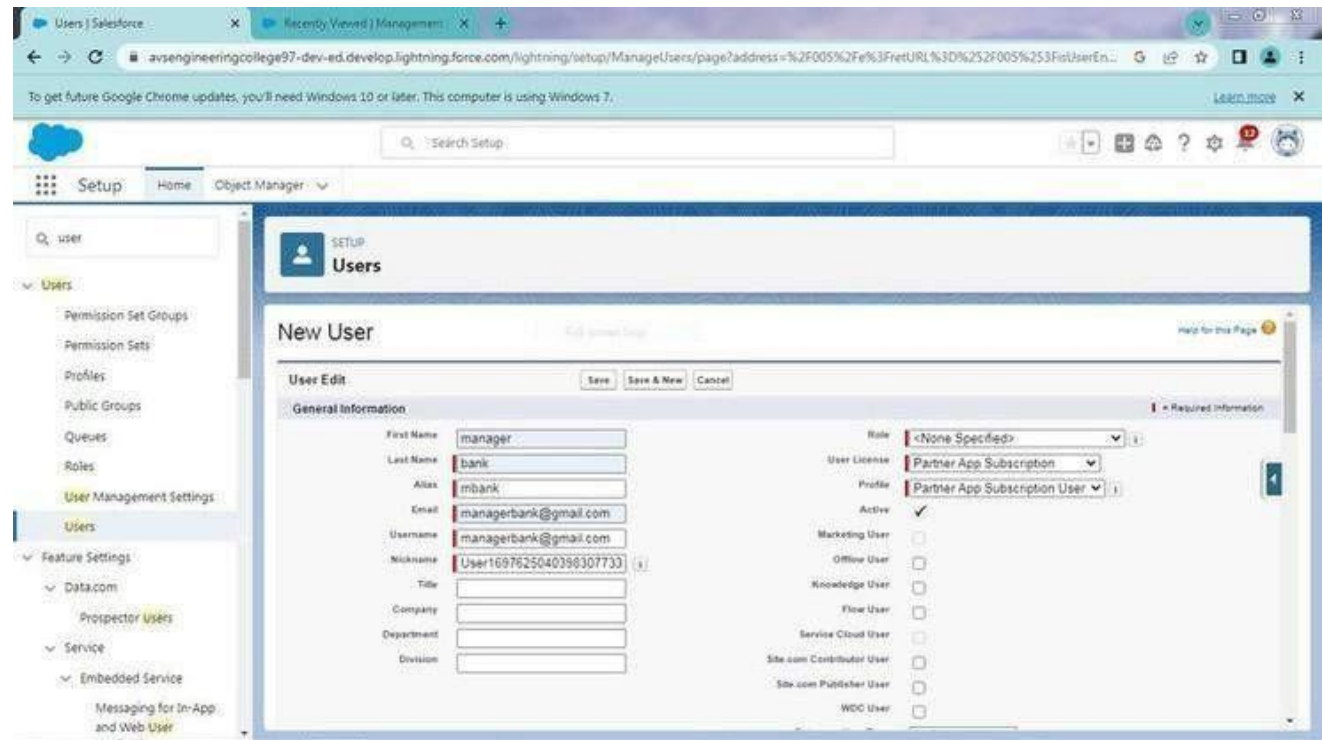
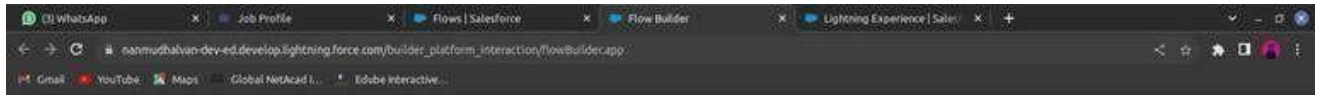
Session Times Out After: 1

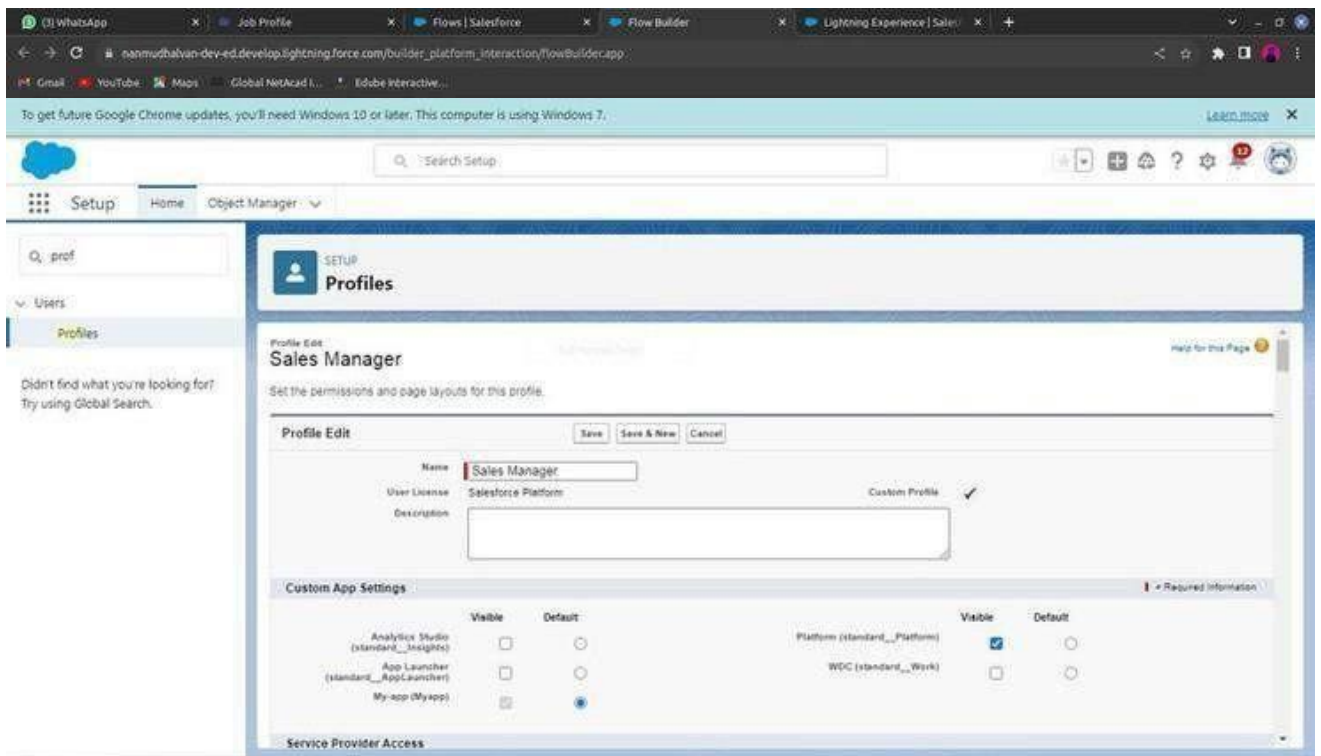
Session Security Level Required at Login: 1

Password Policies

User passwords expire in:

Enforce password history:







Profiles | Salesforce

Recently Viewed / Management

avsengineeringcollege97-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address+%2F00e5j000000nx0%2F%3FretURL%3D%252F0...

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. prof

Users

Profiles

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

SETUP Profiles

Contact Point Addresses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Consents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Emails	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Selfers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Streaming Channels	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
User External Credentials	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Custom Object Permissions

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

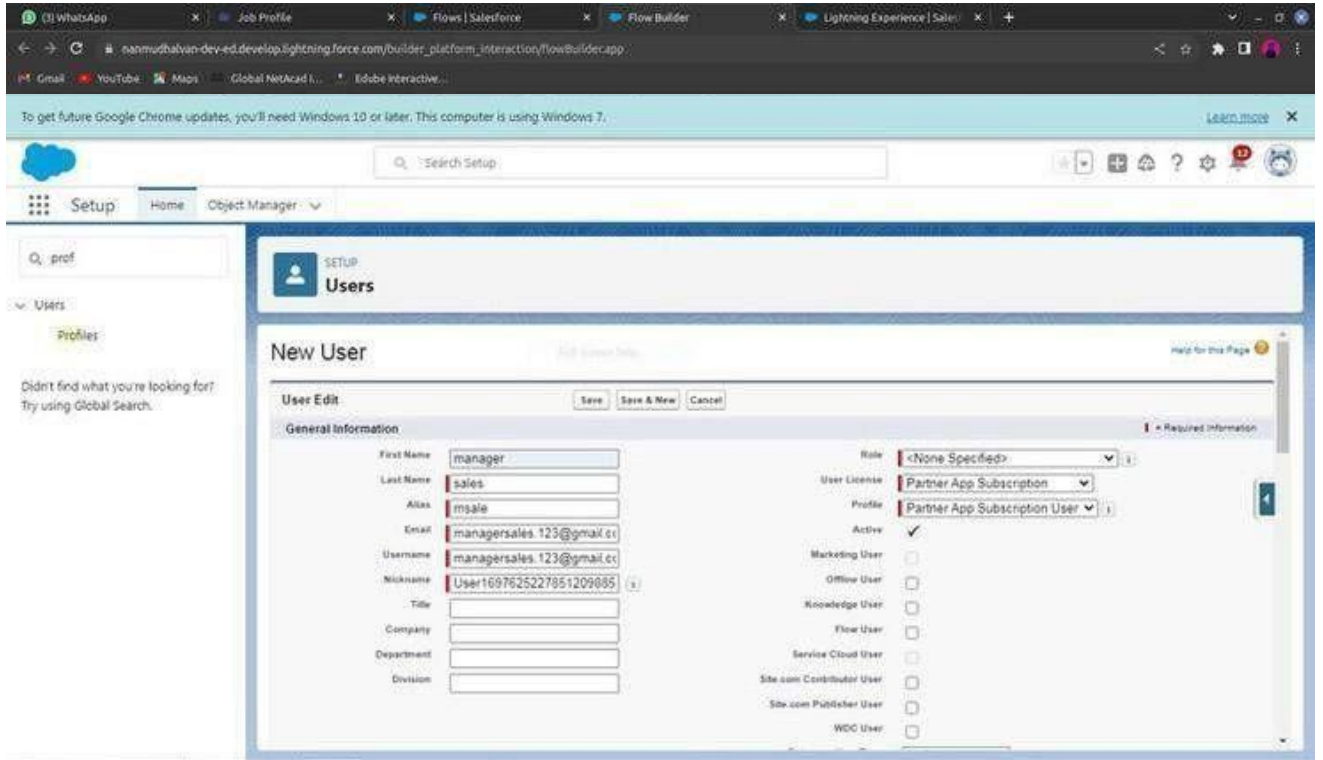
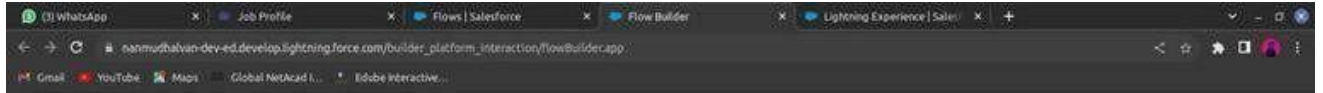
Session Settings

Session Times Out After: 2 hours of inactivity

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

Password Policies

User passwords expire in: 90 days



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

Setup Home Object Manager

per

Hyperforce Assistant
Lightning Experience Transition Assistant

Users

Permission Set Groups

Permission Sets

Feature Settings

Digital Experiences

Settings

Functions

Sales

Accounts

Person Accounts

Salesforce Scheduler

Assignment Policies

Salesforce Scheduler

SETUP Permission Sets

Permission Set: **managerbanksales** [Add Screen Info](#) [Video Tutorial](#) [Help for this Page](#)

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

Permission Set Overview

Description	API Name
managerbanksales	managerbanksales

License	Namespace Prefix
	managerbanksales

Session Activation Required	Created By
<input type="checkbox"/>	apex, 18/10/2023, 4:06 pm

Permission Set Groups Added To	Last Modified By
0	apex, 18/10/2023, 4:06 pm

Apps

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

Assigned Connected Apps
Settings that specify which connected apps are visible in the app menu

Object Settings
Permissions to access objects and fields, and settings such as tab availability

App Permissions
Permissions to perform app-specific actions, such as "Manage Call Centers"

Apex Class Access

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SETUP Permission Sets

Permission Set: **managerbanksales** [Add Screen Info](#) [Video Tutorial](#) [Help for this Page](#)

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

Permission Set Overview > Object Settings > Accounts

Accounts Save Cancel

Object Permissions

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

Field Permissions

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

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

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

Navigation bar: My-app, Recently Viewed, College, Department, Details, Management, Customers, Bank

Section: Customers Recently Viewed

0 items • Updated a few seconds ago

Search: Search this list...

Columns: Total Life Time Value, Name

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