

# **Naan Mudhalvan Salesforce Developer (Course) Assignment**

Name: PAVITHRA G

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Year and Dept: 4<sup>th</sup> 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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Object Name  Example: Account

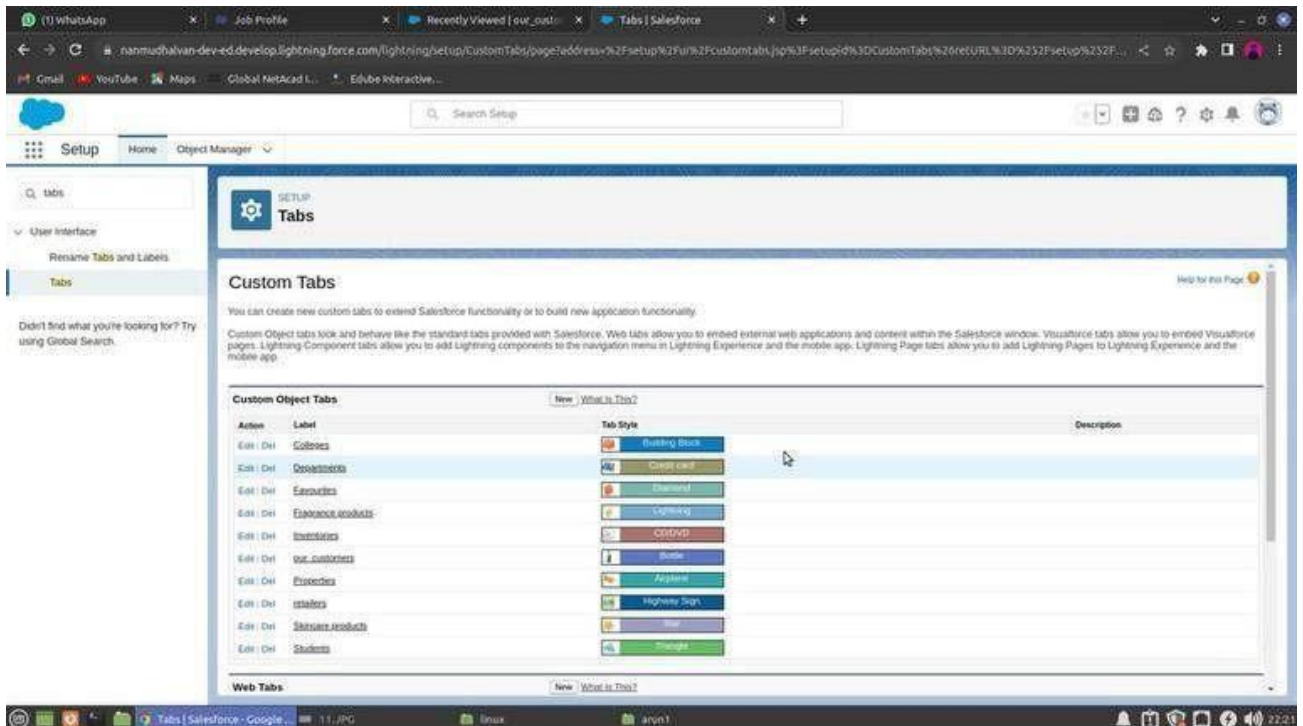
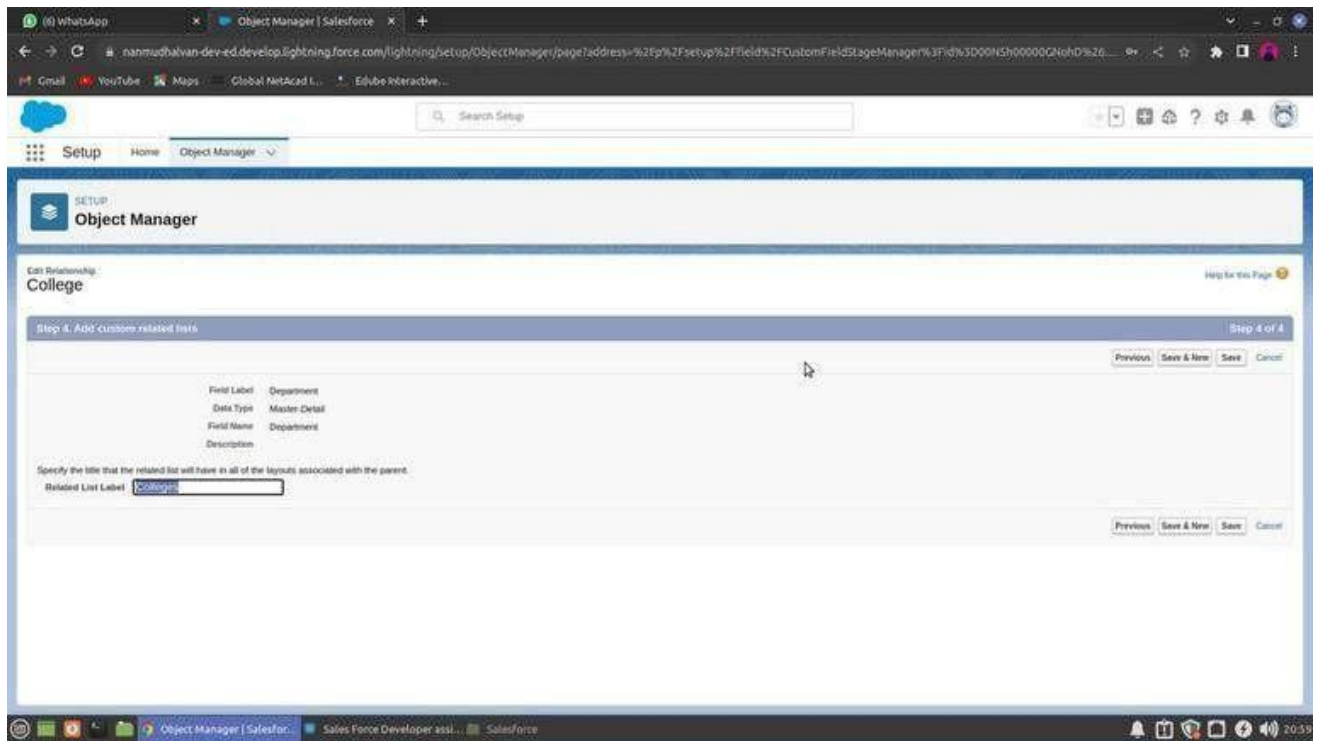
Description

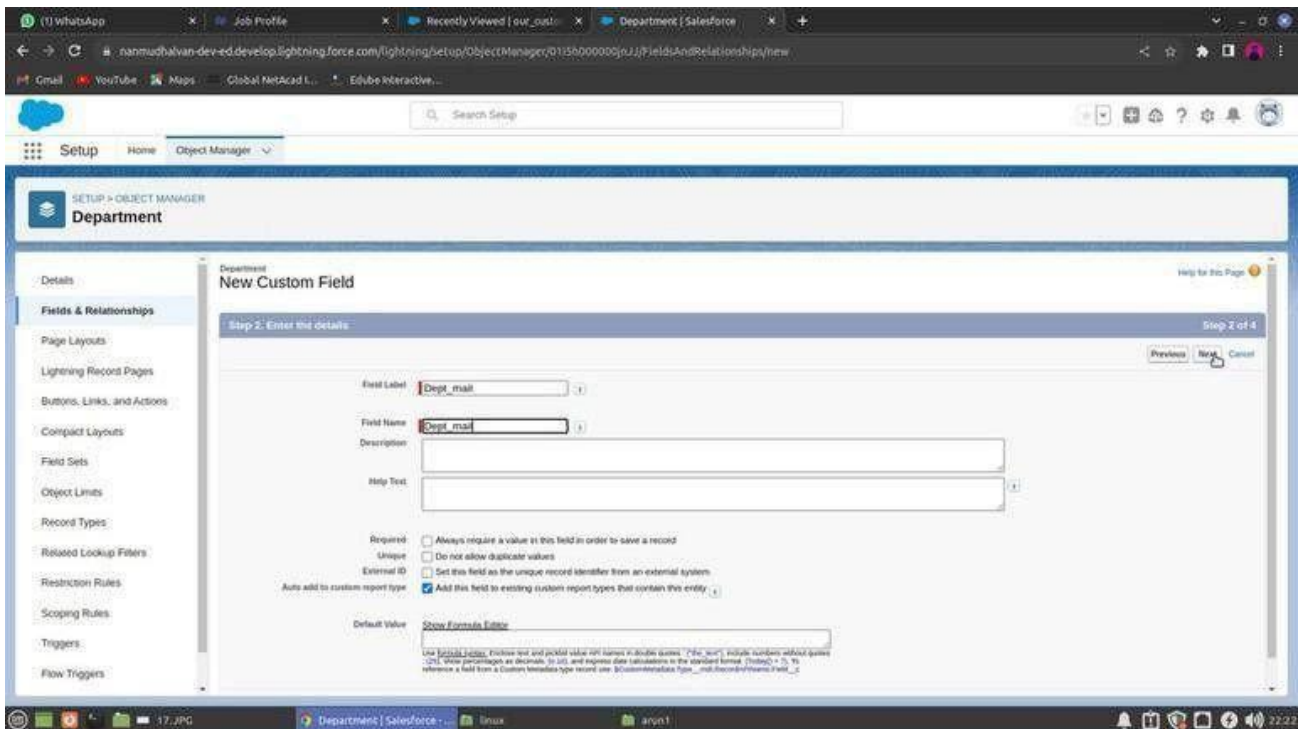
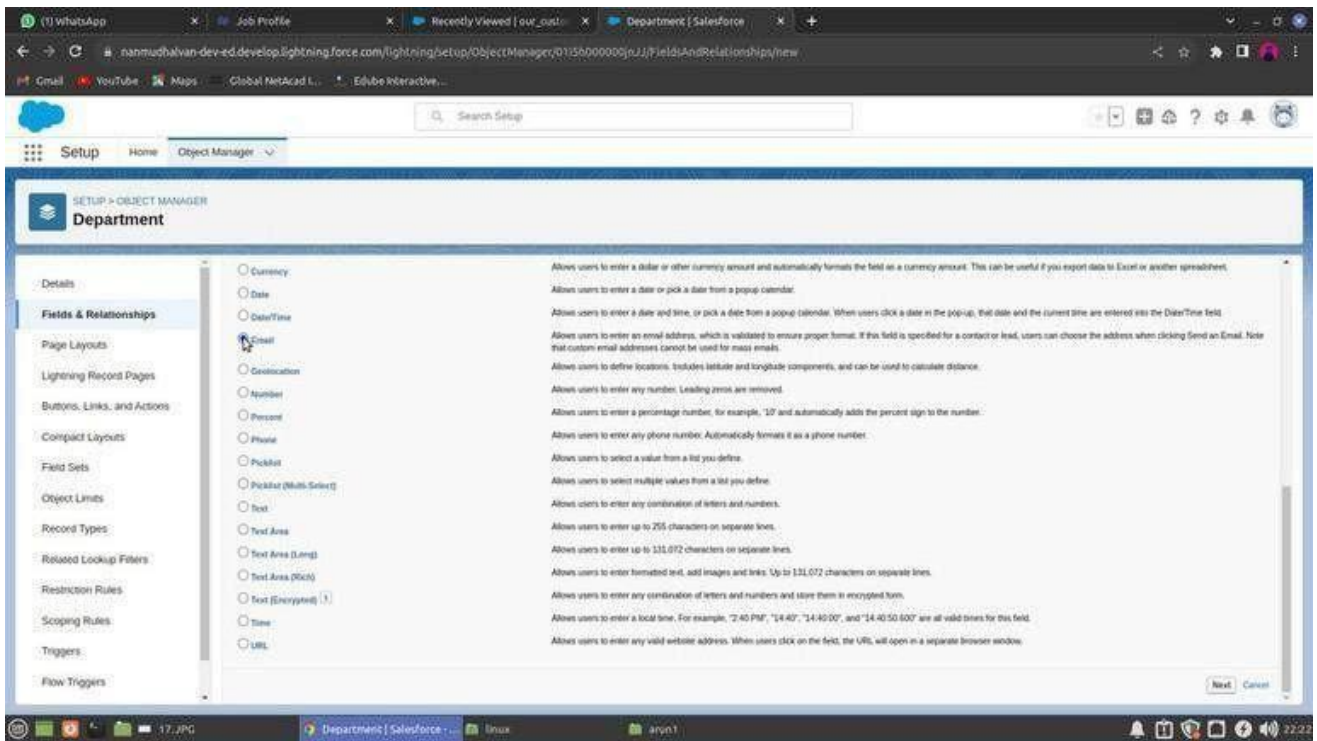
Context Sensitive Help Setting ☒ Open the standard Salesforce.com Help & Training window ☐ Open a window using a Visualforce page

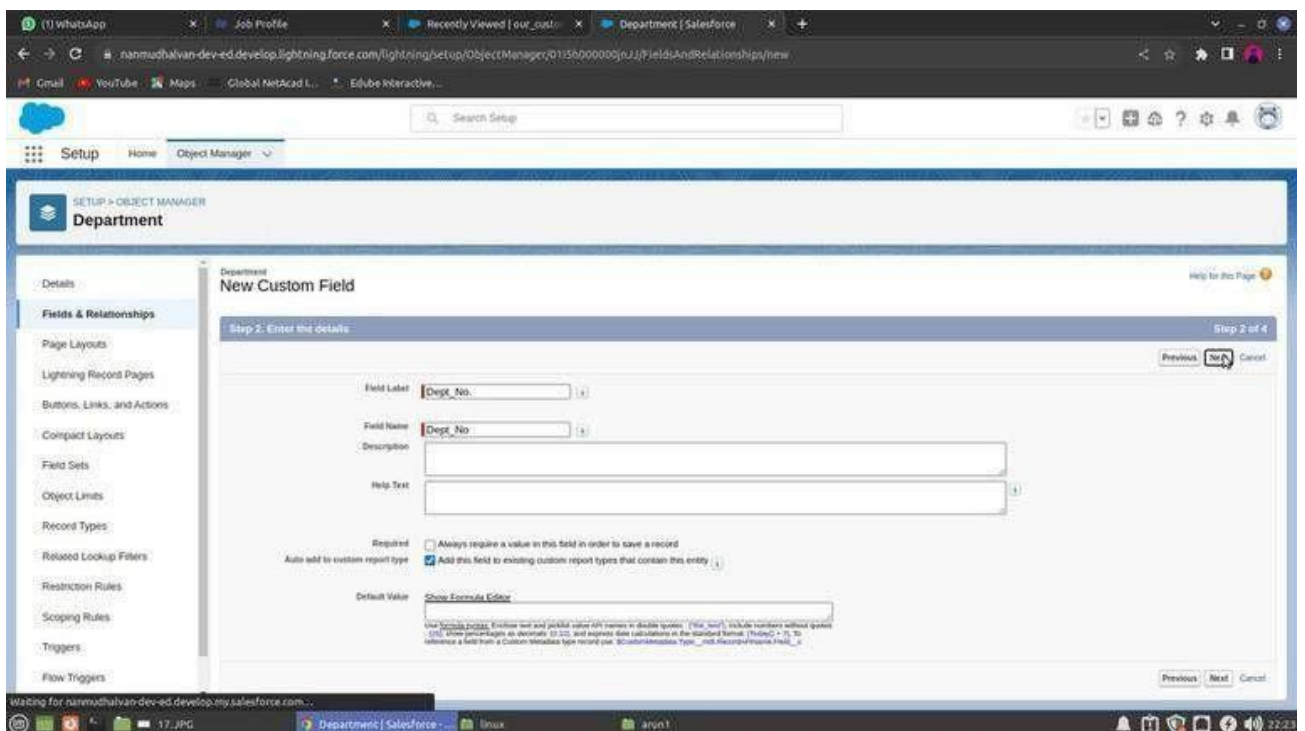
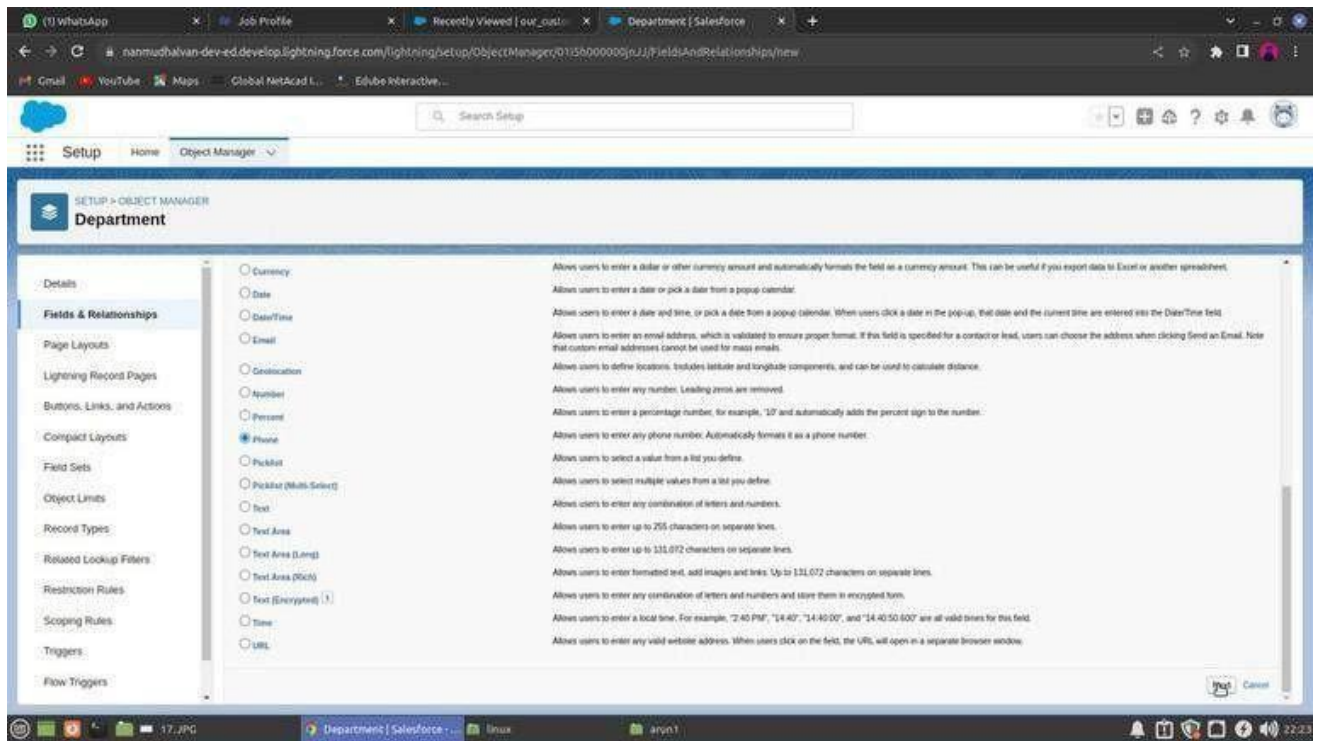
Content Name

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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**

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

Department

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Department

New Relationship

Step 6 of 6: Add custom related lists

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

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

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

Add Related List: Page Layout Name  
☒ College Layout

☒ Append related list to users' existing personal customizations

Previous Save & New Save Cancel

Setup Home 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

Data Type

None Selected

Auto Number

Formula

☒ Roll-Up Summary

Lookup Relationship

Master-Detail Relationship

External Lookup Relationship

Checkbox

Currency

Date

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.

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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- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

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

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

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

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

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



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 Field

Help for this Page

Step 2. Enter the details

Step 2 of 5

Previous Next Cancel

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

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Object Limits

Record Types

Related Lookup Filters

Search Layouts

College

### New Custom Field

Roll-up Summary Field

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

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

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)		

Setup Home Object Manager

Lightning Experience App Manager

New Lightning App New Connected App

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

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

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

**New Lightning App**

### App Details & Branding

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

#### App Details

\*App Name ⓘ

\*Developer Name ⓘ

Description ⓘ

#### App Branding

Image ⓘ

Primary Color Hex Value ⓘ

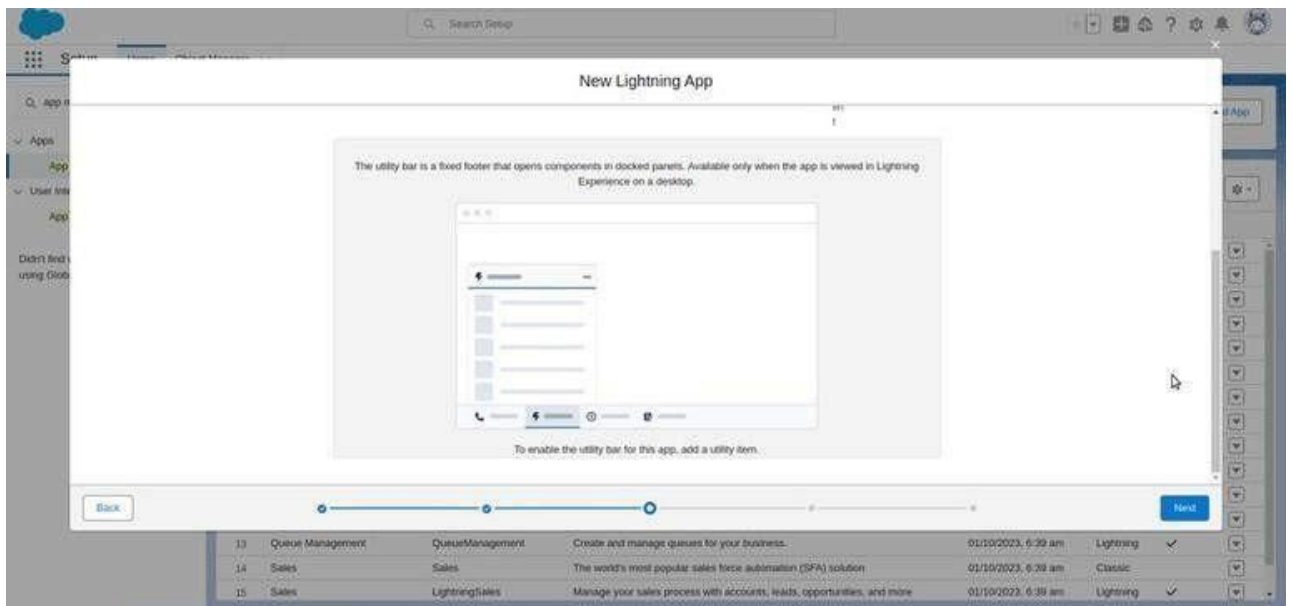
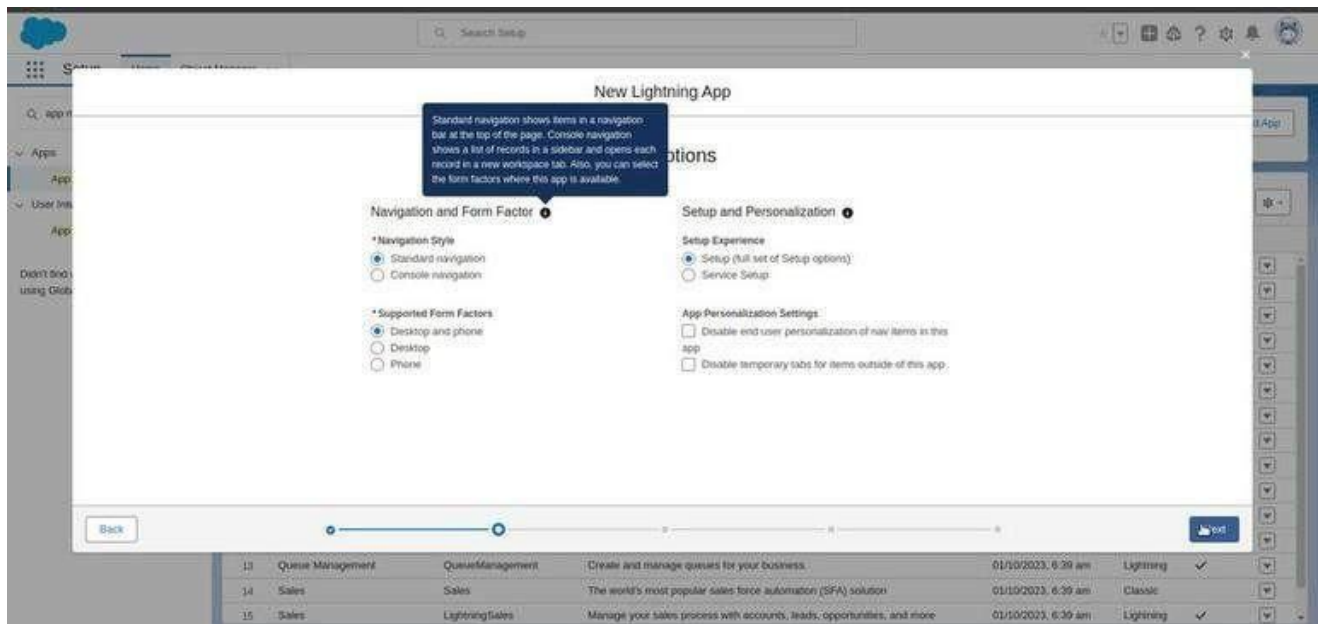
Org Theme Options

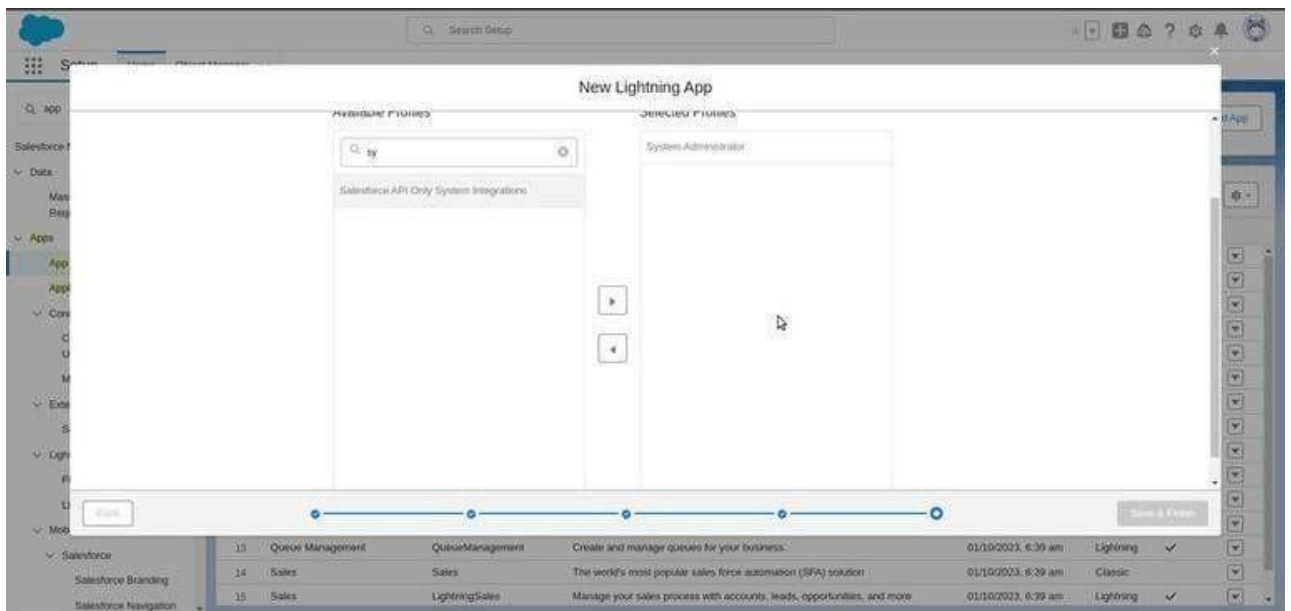
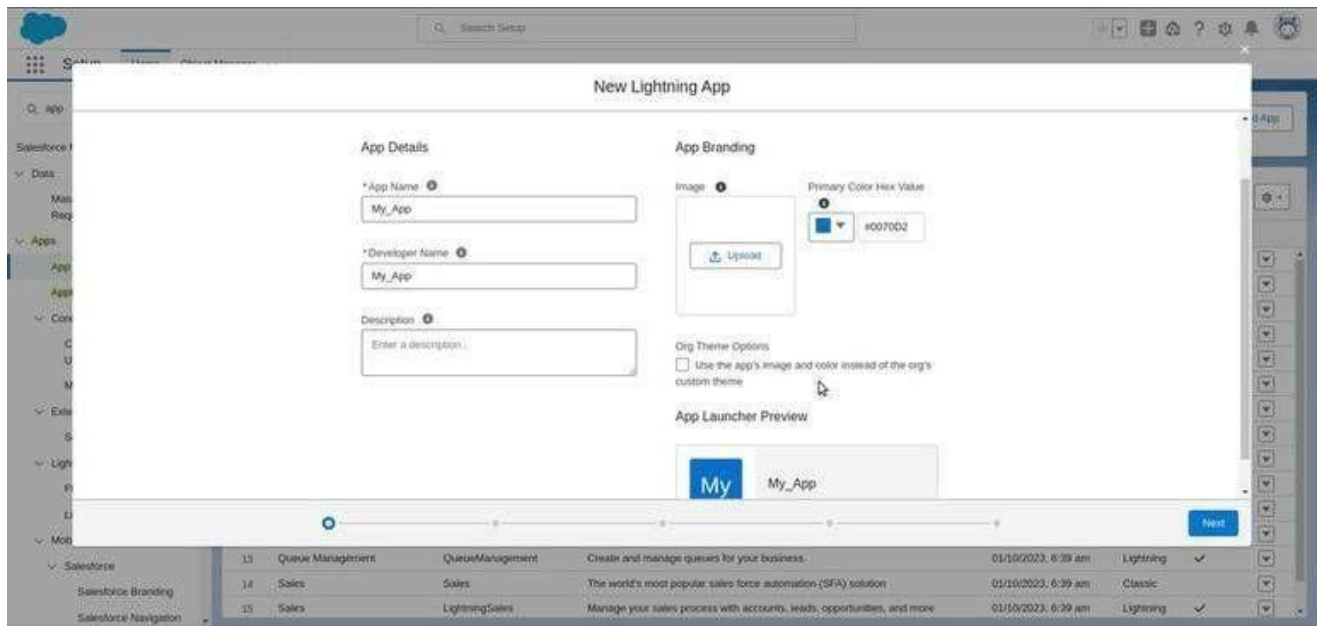
☐ Use the app's image and color instead of the org's custom theme

**App Launcher Preview**

[Next](#)

ID	App Name	App Icon	App Description	App Color	App Status
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 ✓







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

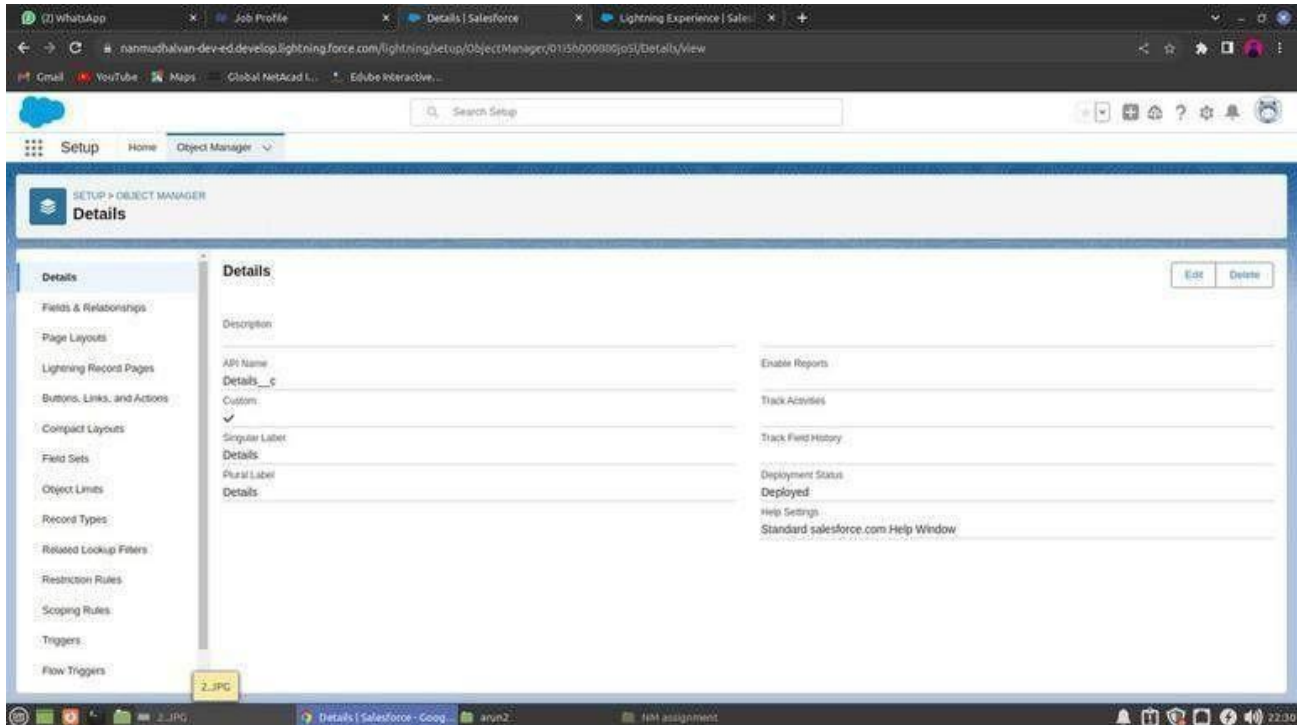
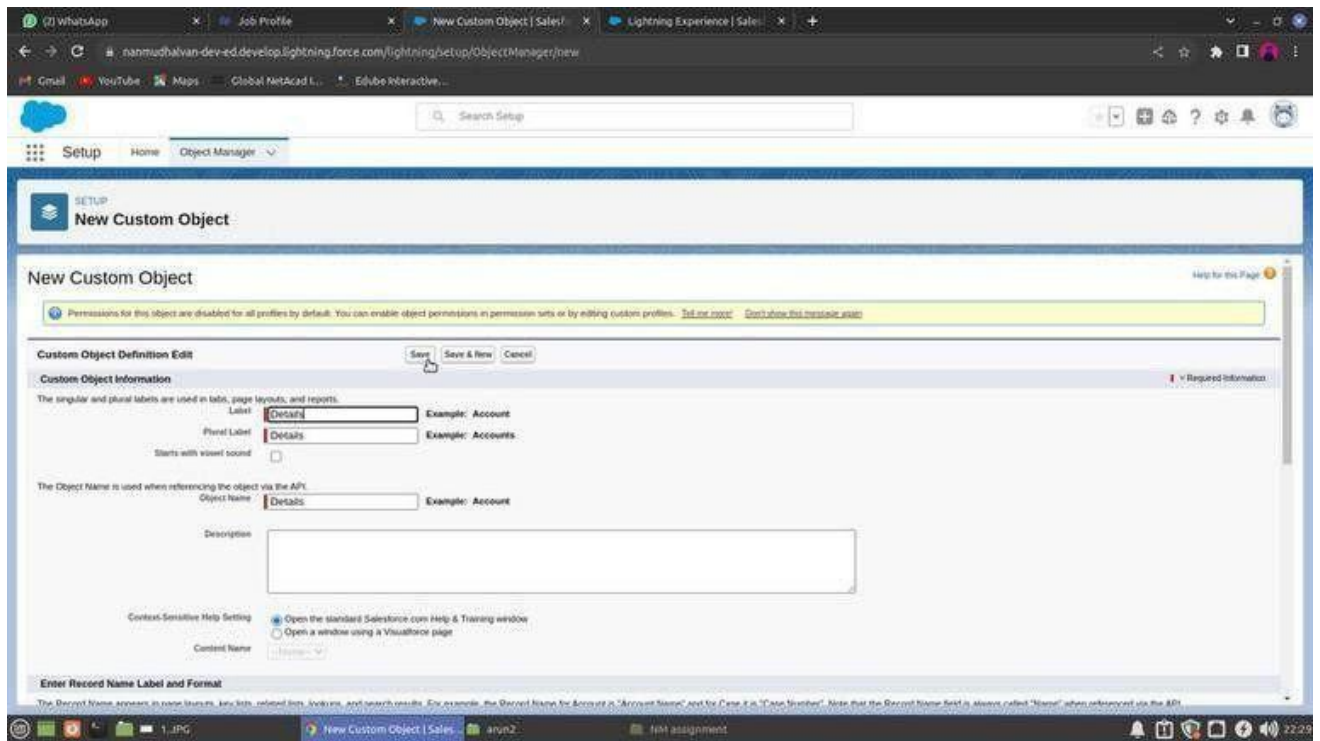
Owner

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

Taskbar: Details | Salesforce - Coog... | anur2... | 1PM assignment | 22:30

Setup > OBJECT MANAGER

## Details

Fields & Relationships

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.

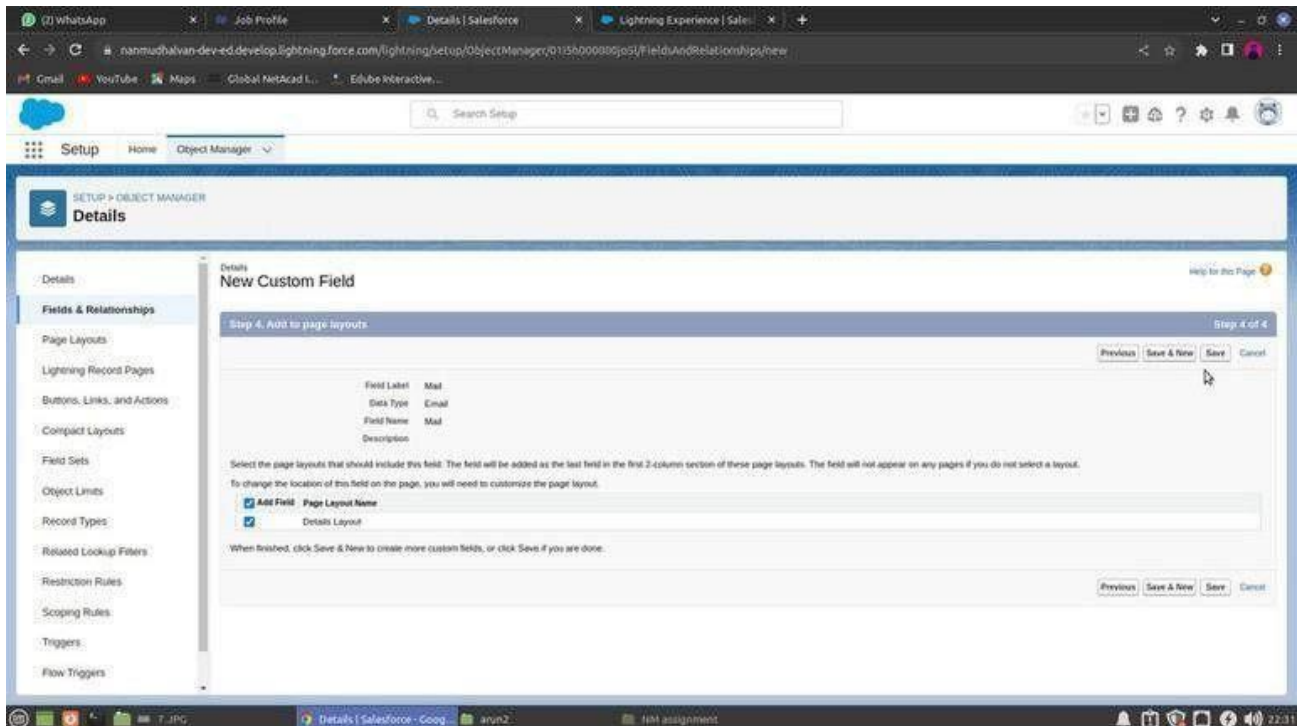
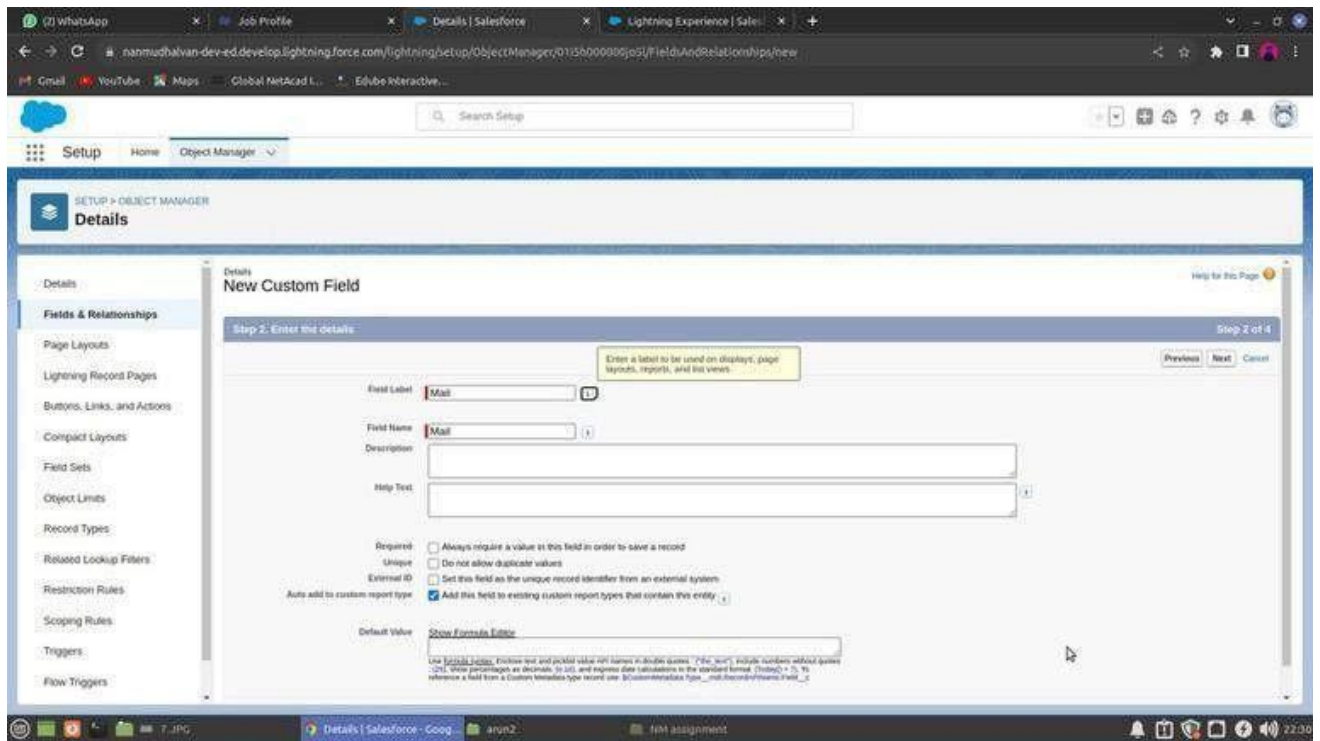
Allows users to select a value from a list you define.

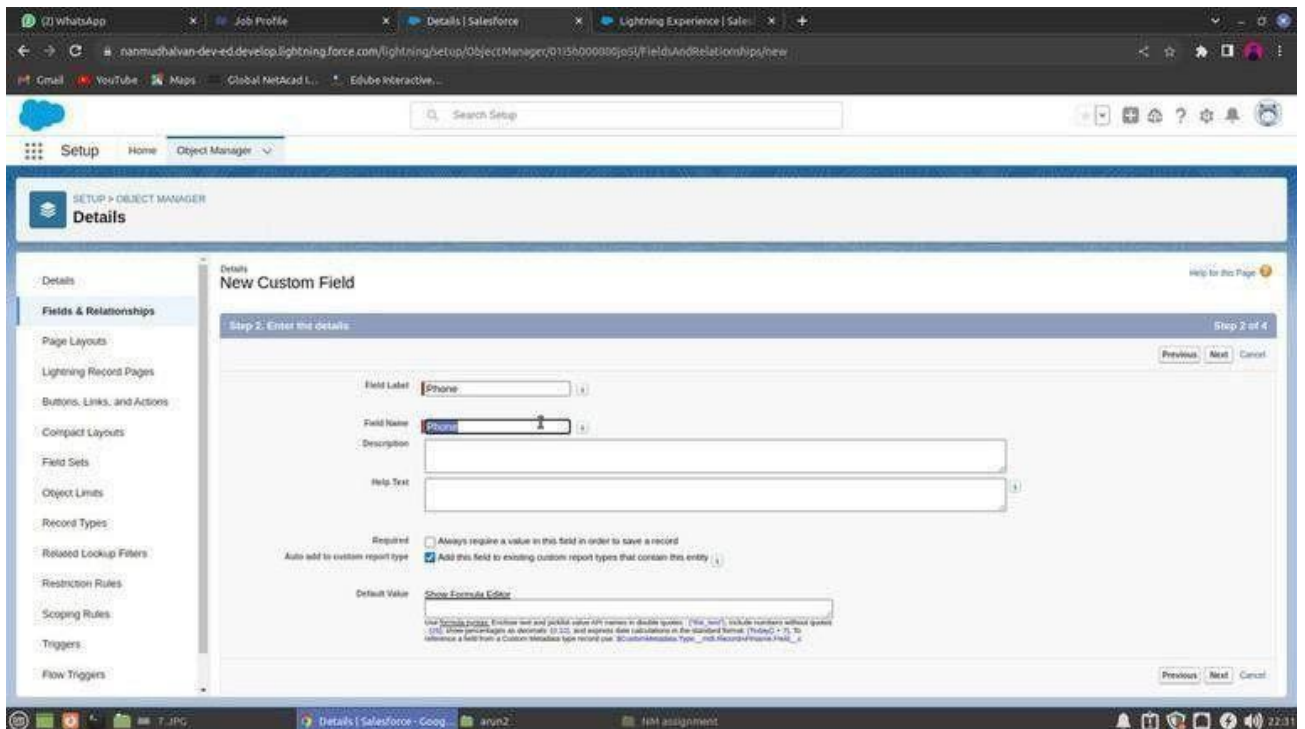
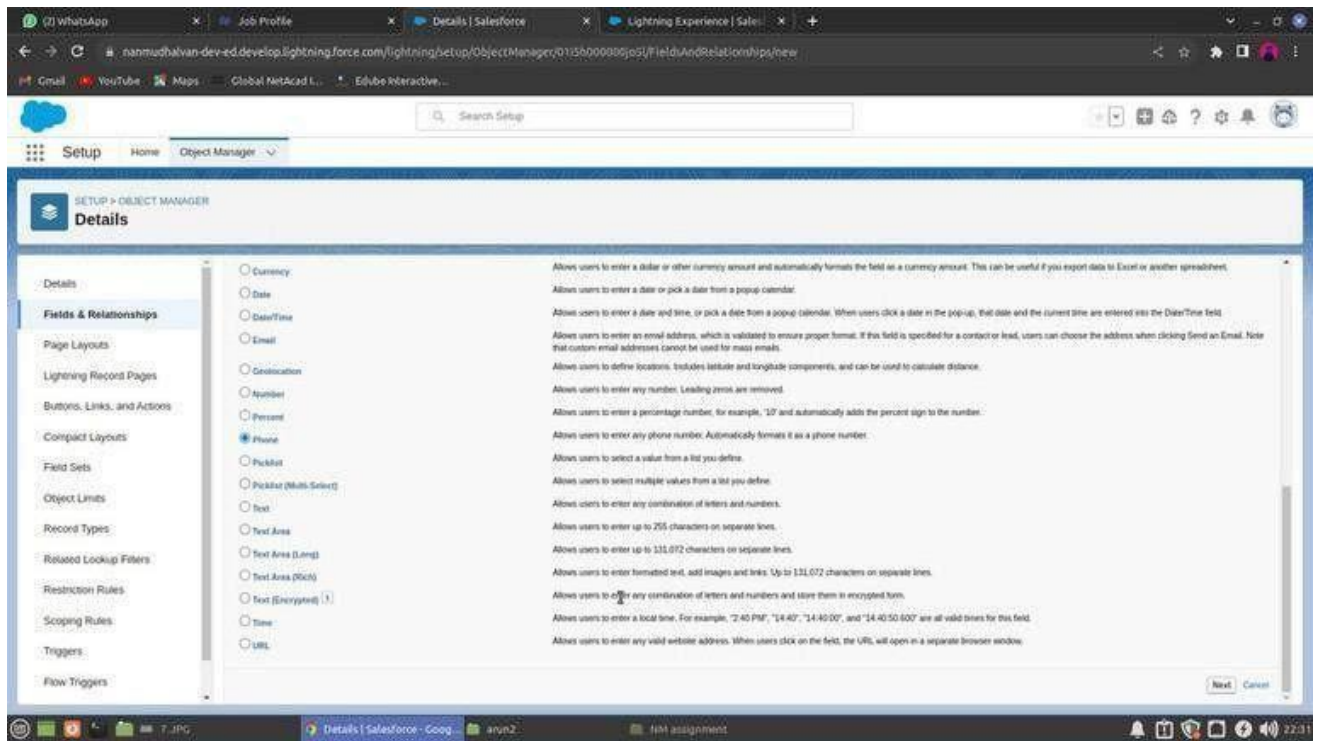
Allows users to select multiple values from a list you define.

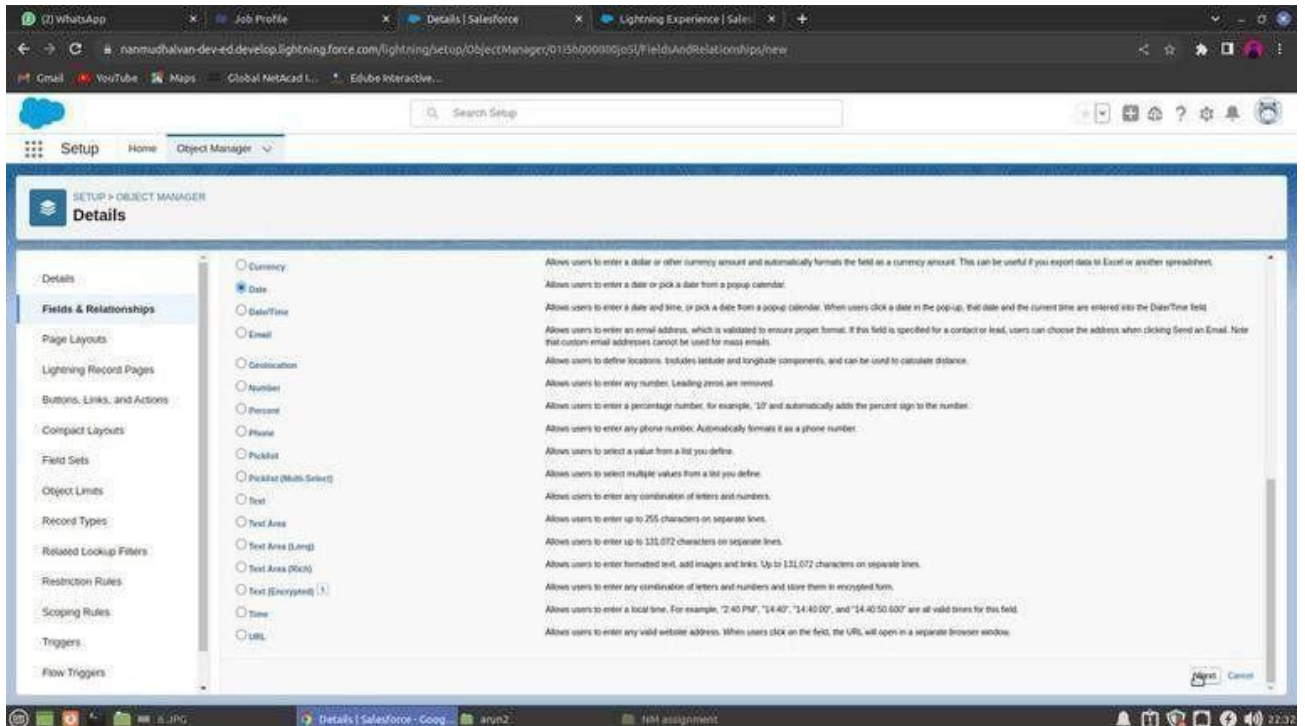
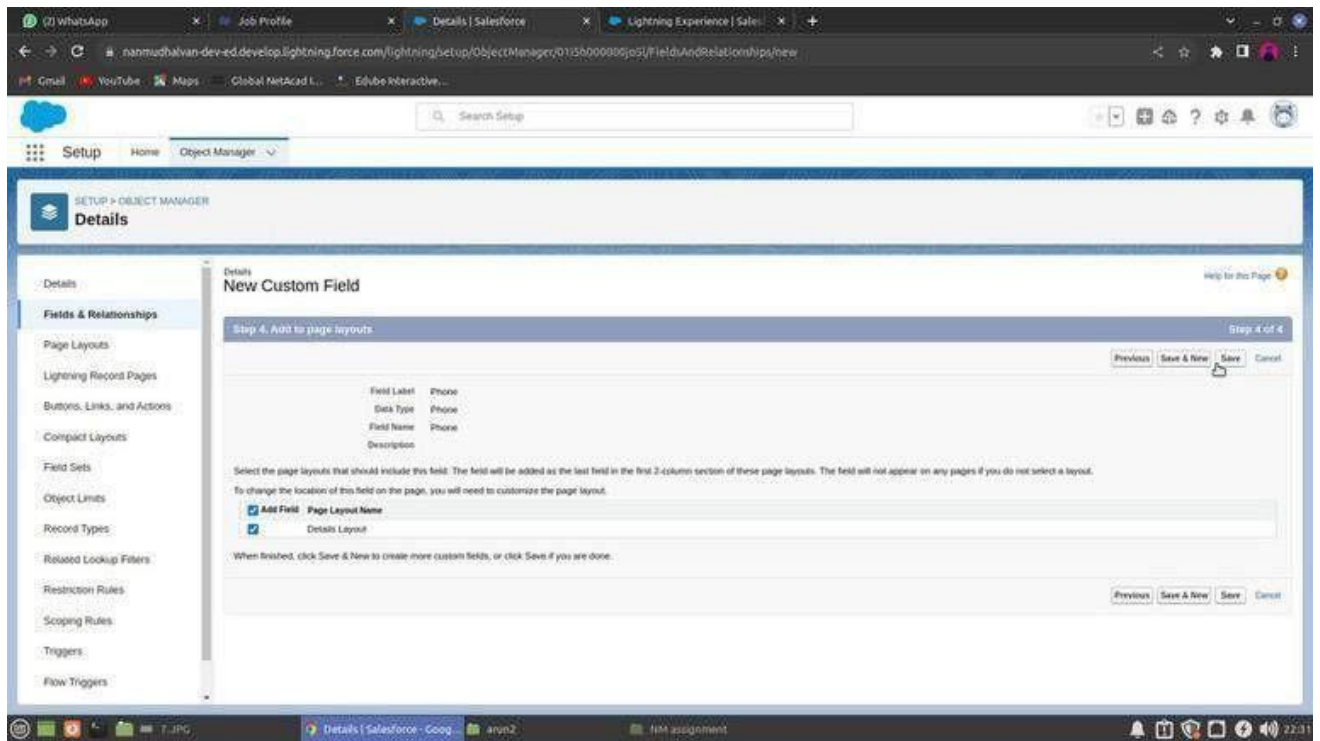
Allows users to enter any combination of letters and numbers.

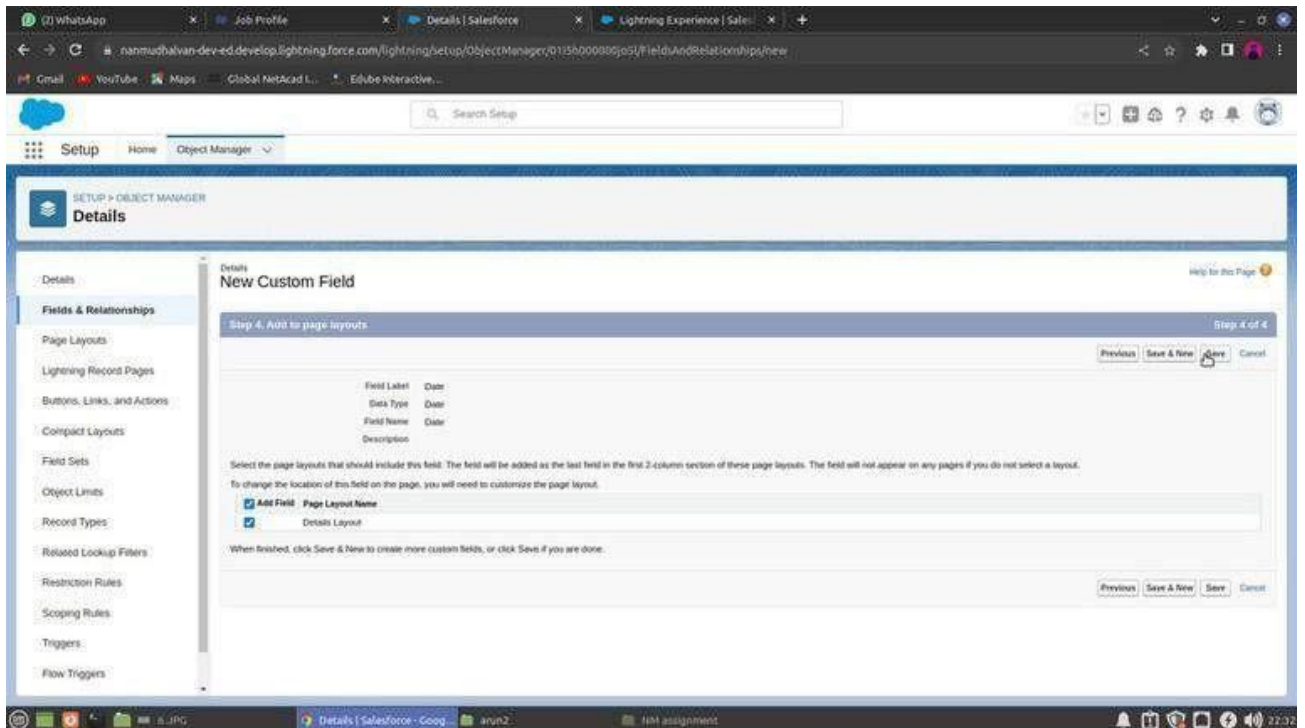
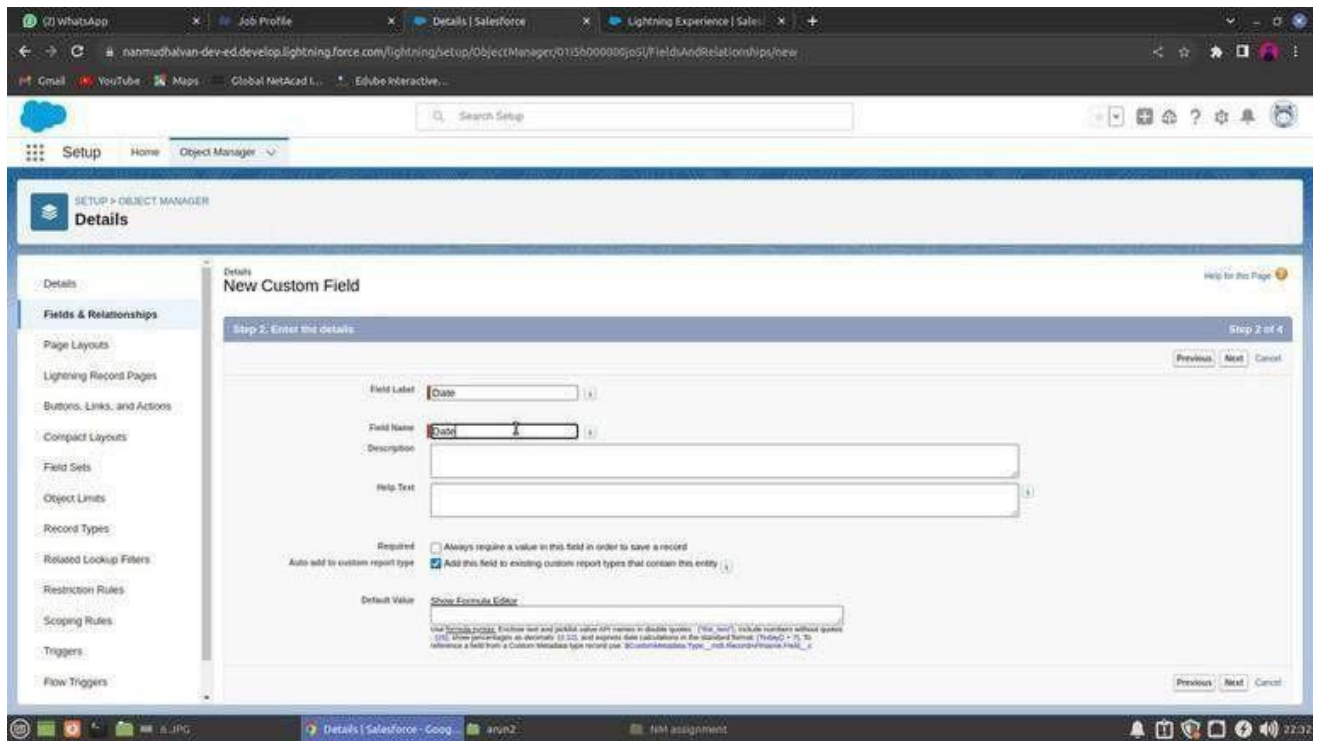
Taskbar: Details | Salesforce - Coog... | anur2... | 1PM assignment | 22:30



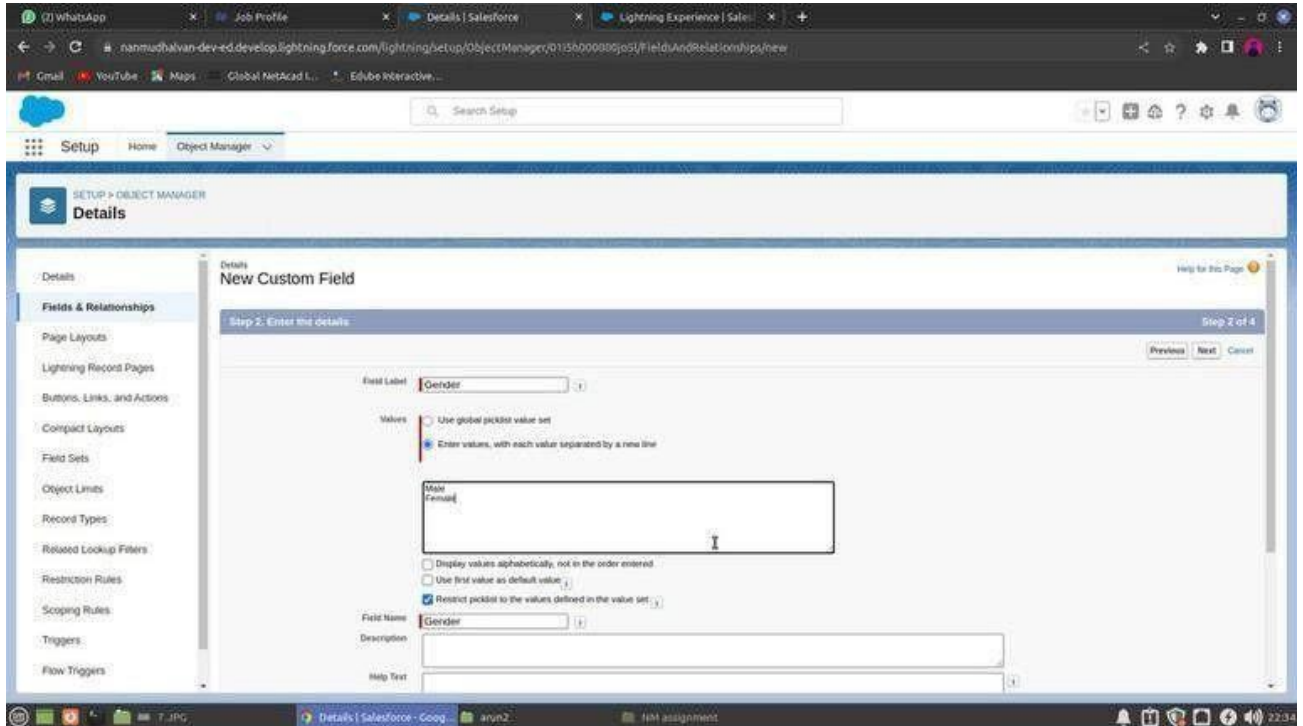
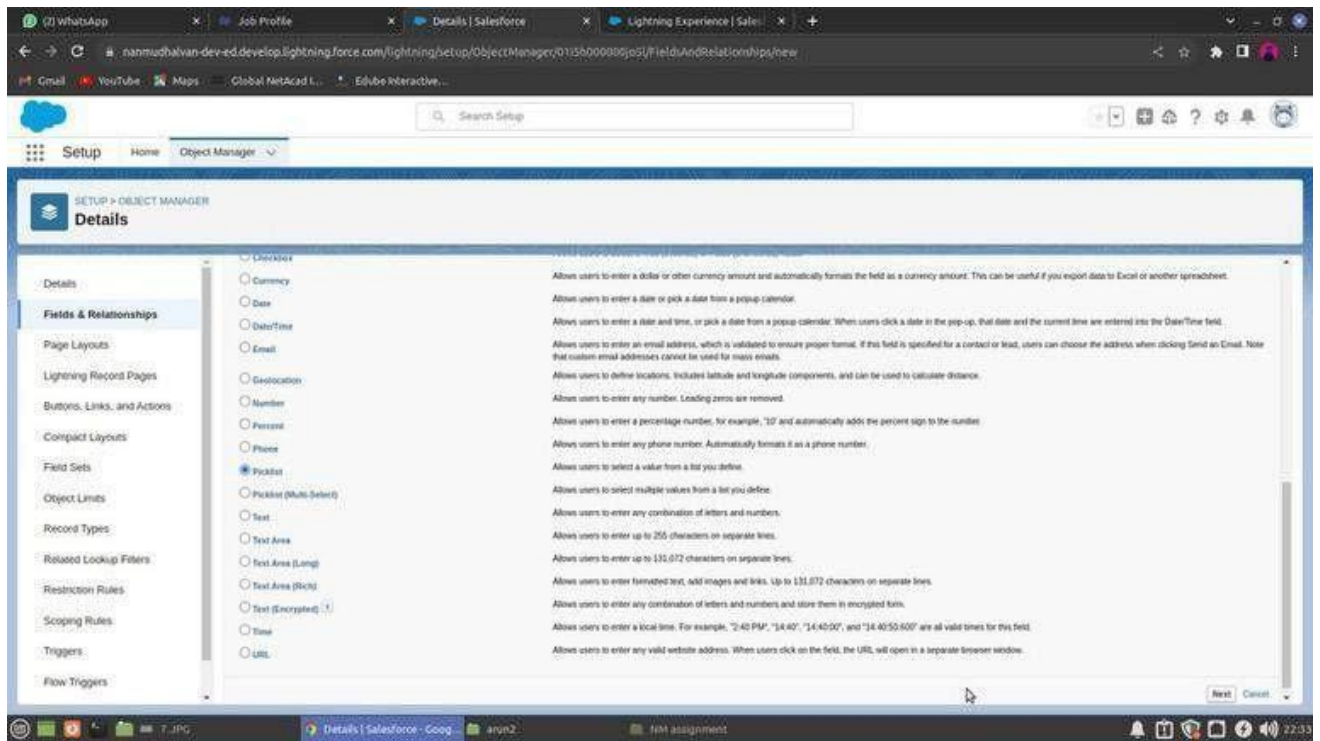




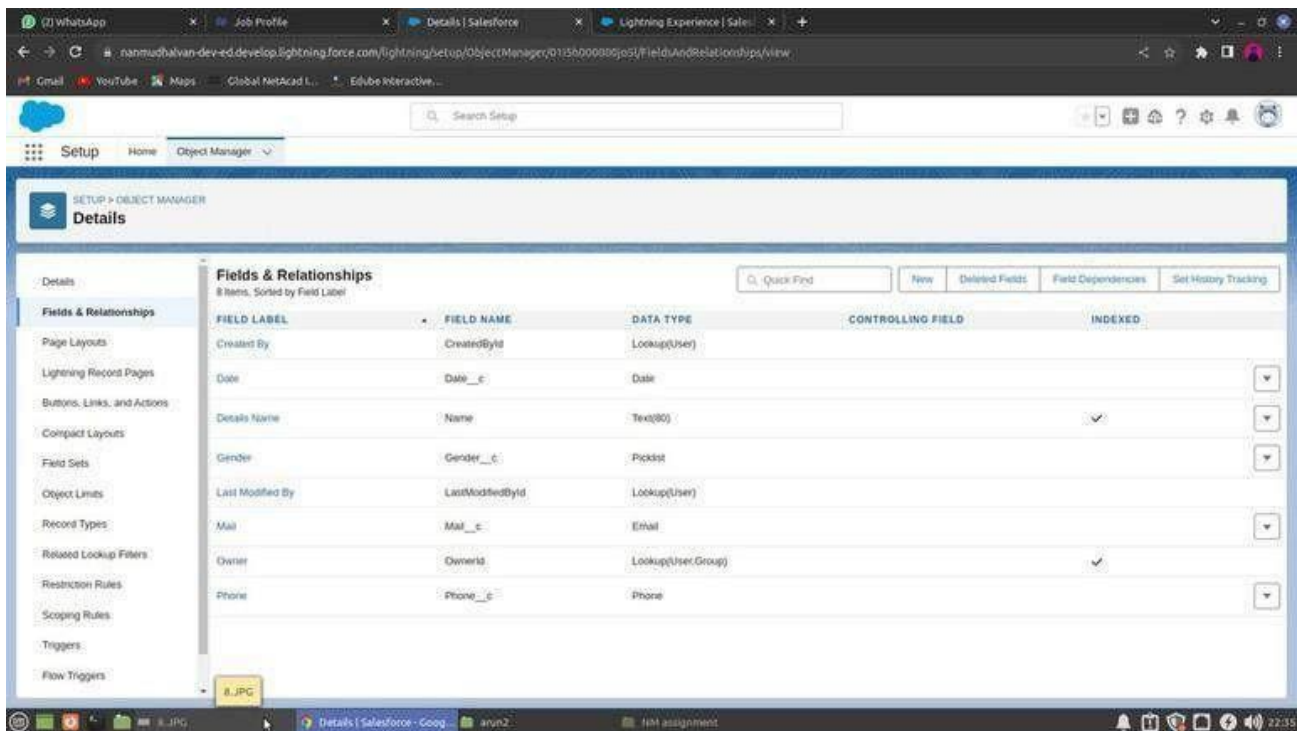
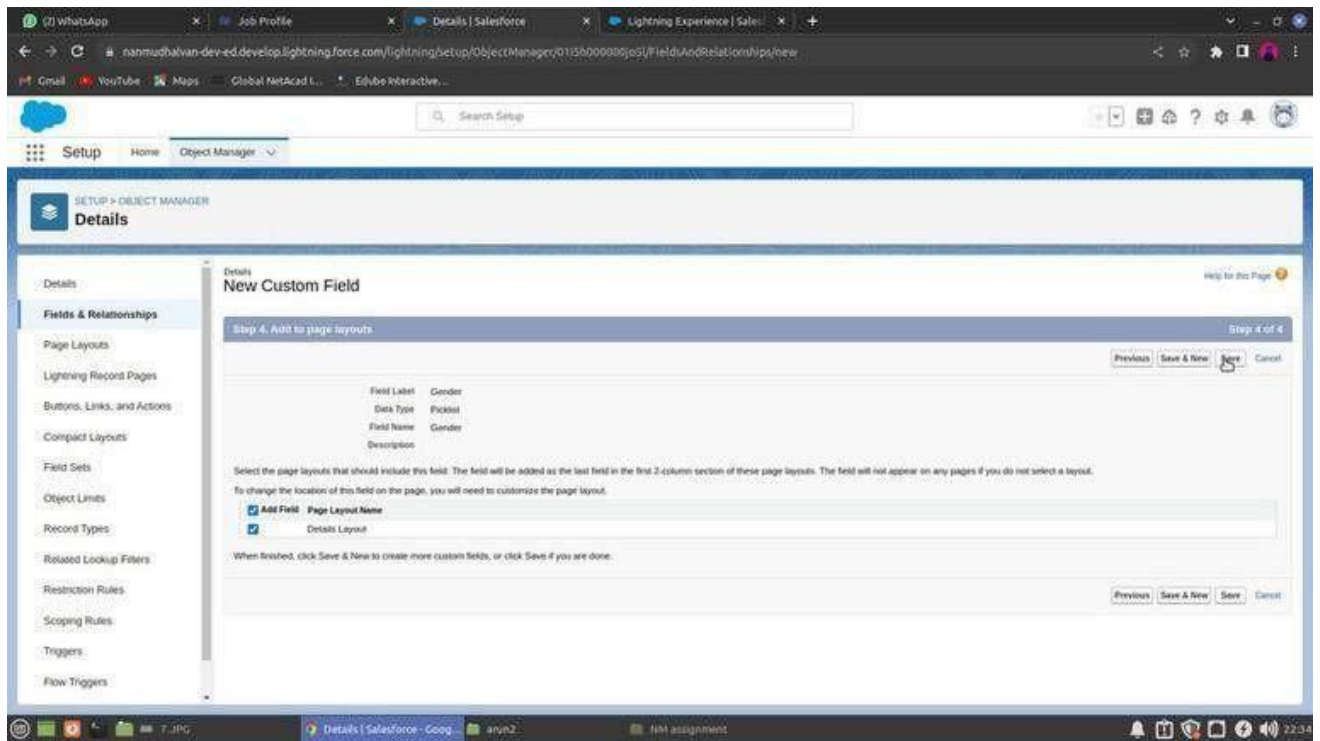


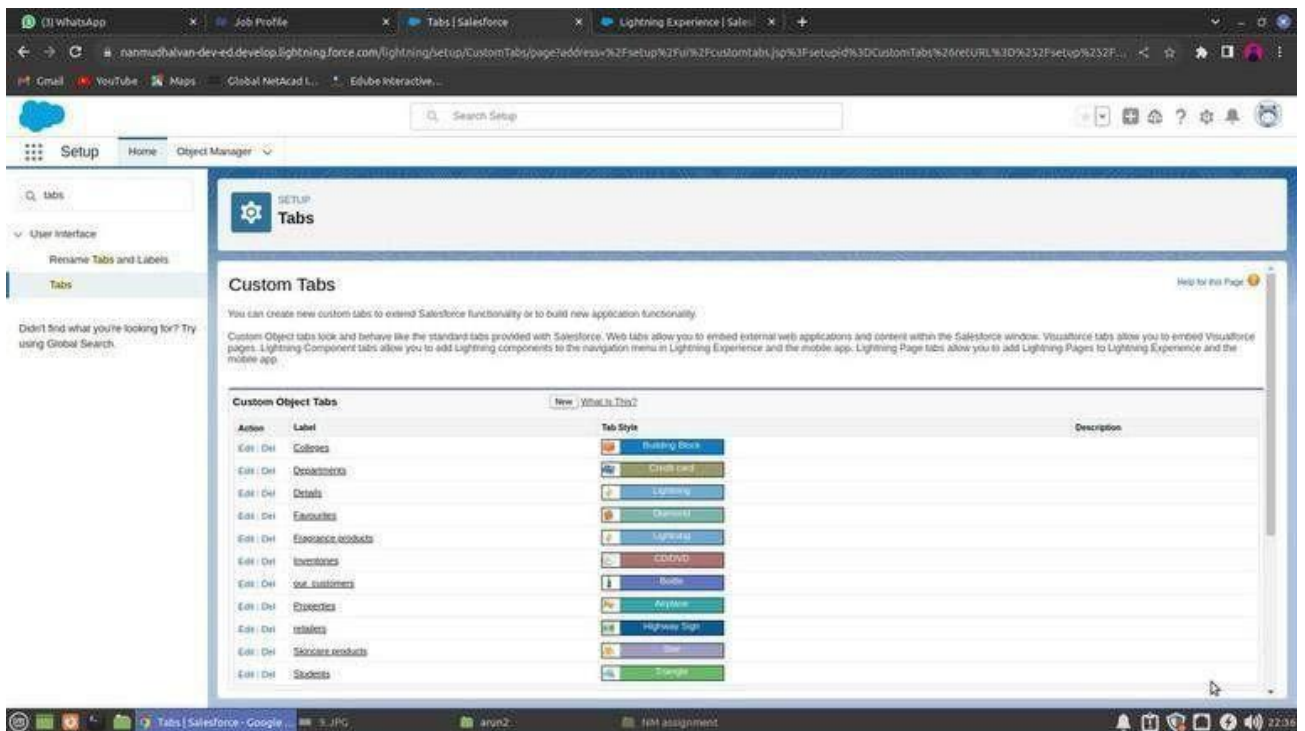
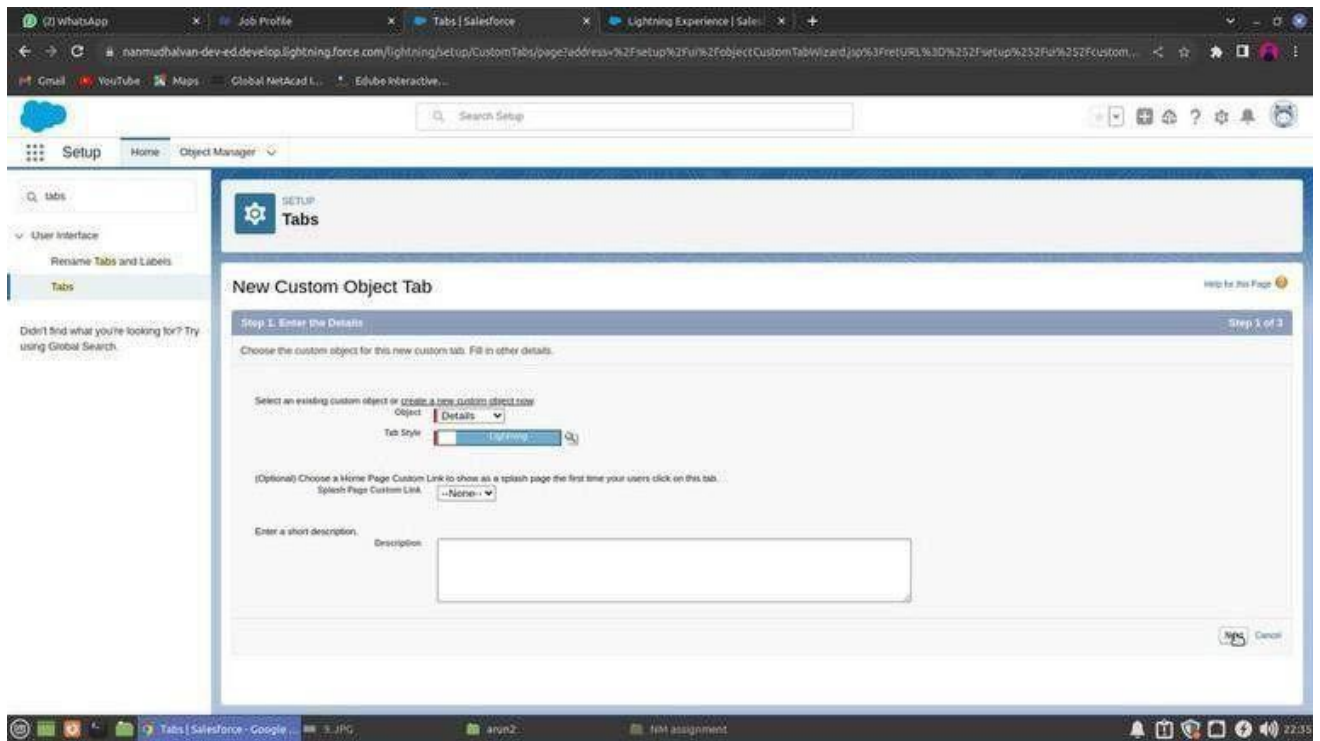












Setup | Home | Object Manager

Flow

Apps

Lightning Bolt

Flow Category

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

Flow Builder

New Flow

Core All + Templates

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

**Record-Triggered Flow**  
Launches when a record is created, updated, or deleted. This autolaunched flow runs in the background.

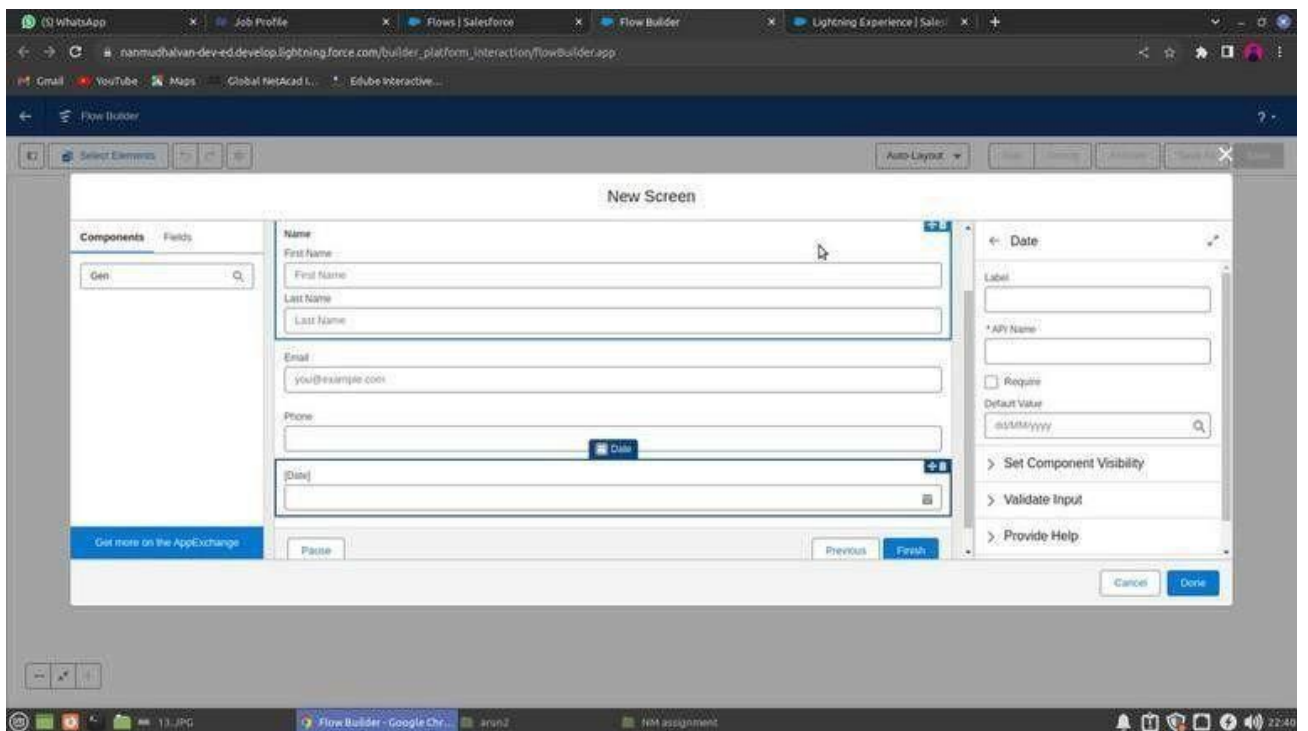
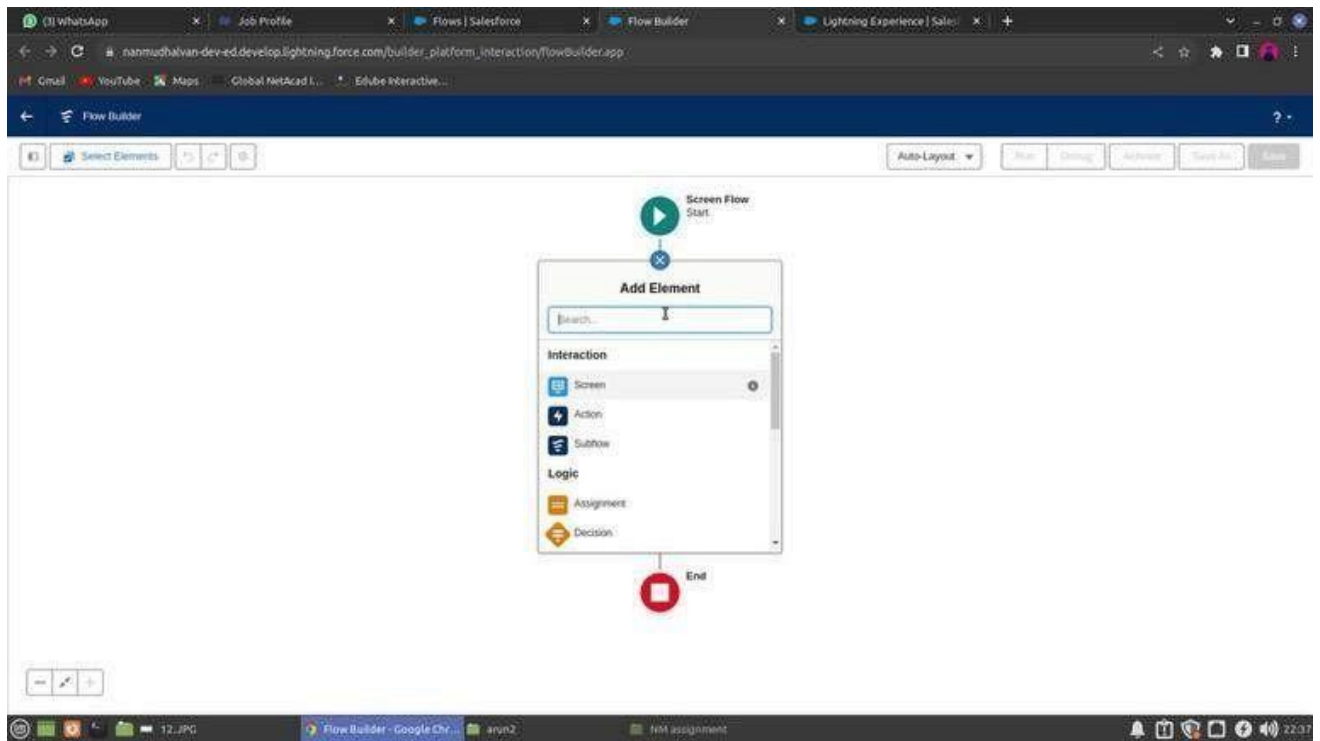
**Schedule-Triggered Flow**  
Launches at a specified time and frequency for each record in a batch. This autolaunched flow runs in the background.

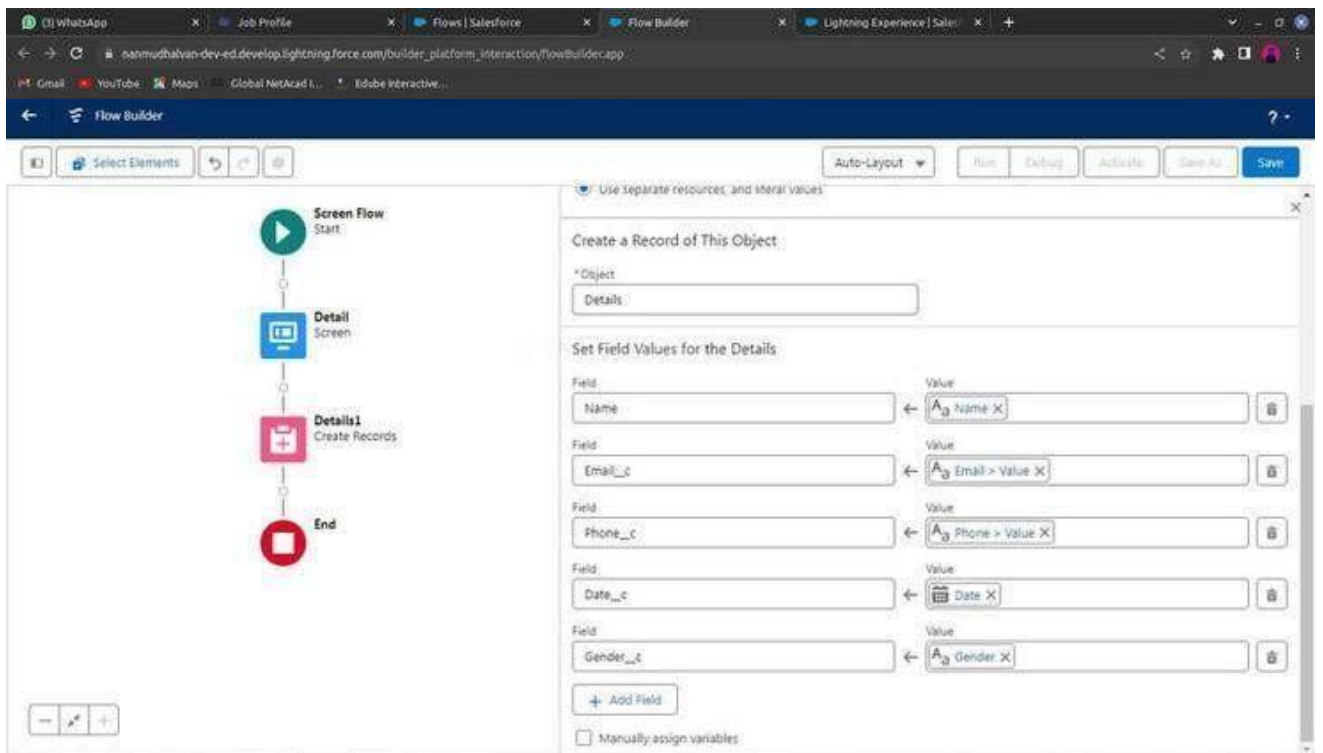
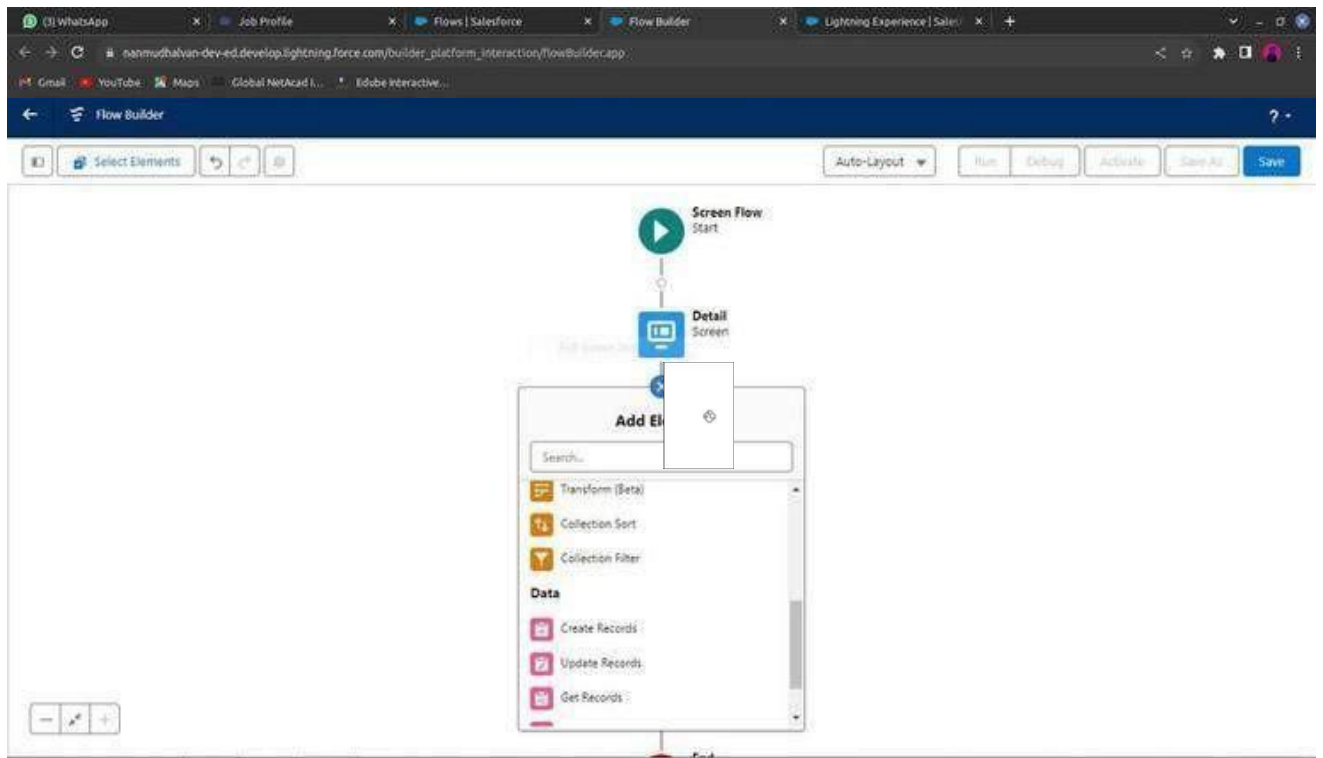
**Platform Event—Triggered Flow**  
Launches when a platform event message is received. This autolaunched flow runs in the background.

**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

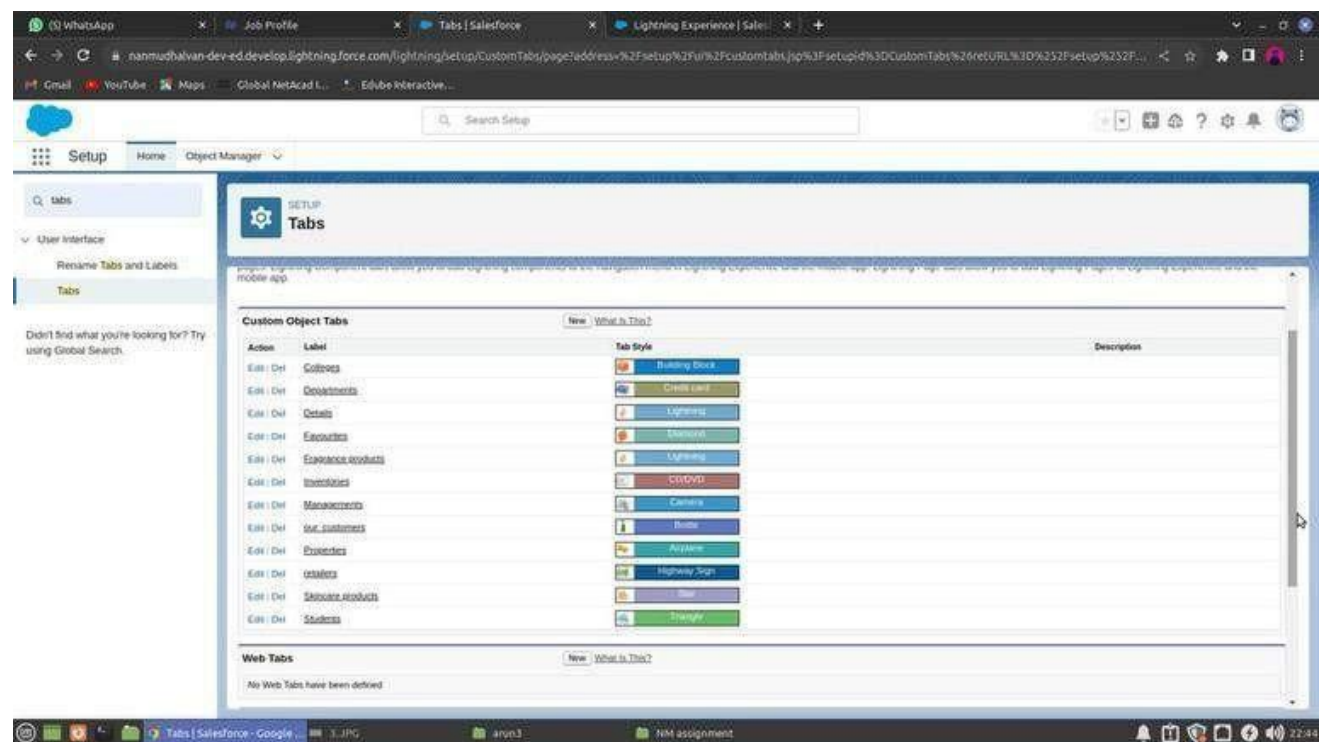
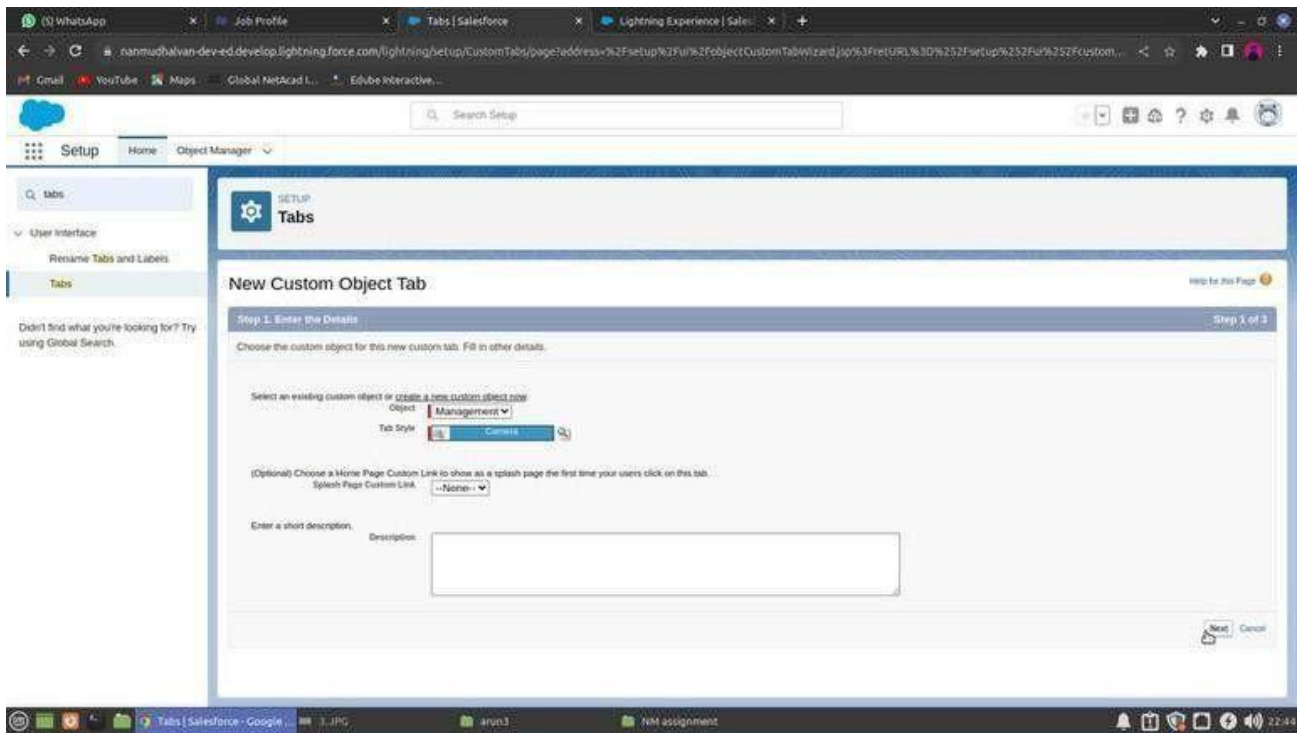
Related

Details

Name	sathishkumar	Owner	SATHISH KUMAR S
Email	sathishsk2003@gmail.com		
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.

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...](#) [Don't show this message again](#)'. The 'Custom Object Definition Edit' section has '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'. The 'Context-Sensitive Help Setting' section has two options: 'Open the standard Salesforce.com Help & Training window' (selected) and 'Open a window using a Visualforce page'. The 'Content Name' field is set to 'Name'. At the bottom, the 'Enter Record Name Label and Format' section has a note: 'The Record Name appears in page layouts, lists, lists, related lists, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.'



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](https://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](https://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

Users

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Mass Transfer Approval Requests

Feature Settings

Data.com

Prospector Preferences

Prospector Users

Functions

Marketing

Lead Processes

Sales

Products

Asset Settings

## SETUP Profiles

Profile Edit Manager

Set the permissions and page layouts for this profile.

Profile Edit

Name: Manager

User License: Salesforce Platform

Description:

Custom Profile: ☒

Custom App Settings

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

Service Provider Access

Setup | Home | Object Manager

Search Setup

Hyperforce Assistant

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Products

Asset Settings

## SETUP Profiles

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

Service Provider Access

Contact Point Consents

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

Streaming Channels

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

Custom Object Permissions

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

Session Settings

Session Times Out After: 2 hours of inactivity

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

Password Policies

User passwords expire in: 90 days

Enforce password history: 3 passwords remembered

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 Type, 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** Edit Clone Delete View Users

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

**Page Layouts**

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

Setup Home Object Manager

Search Setup

Users

New User

User Edit Save Save & New Cancel

**General Information**

First Name	manager	Role	Marketing Team
Last Name	1	User License	Salesforce Platform
Alias	mt	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: ☐

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Search Setup

Setup Home Object Manager

per

Hyperforce Assistant

Lightning Experience Transition Assistant

Users

Permission Set Groups

Permission Sets

Feature Settings

Digital Experiences

Settings

Functions

Sales

Accounts

Person Accounts

Salesforce Scheduler

Assignment Policies

Salesforce Scheduler

## SETUP Permission Sets

### Permission 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

Hyperforce Assistant  
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Settings  
Functions  
Sales  
Accounts  
Person Accounts  
Salesforce Scheduler  
Assignment Policies  
Salesforce Scheduler

### SETUP Permission Sets

Permission Set: **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

Hyperforce Assistant  
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Accounts  
Person Accounts  
Salesforce Scheduler  
Assignment Policies  
Salesforce Scheduler

### SETUP Permission Sets

Permission Set: **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

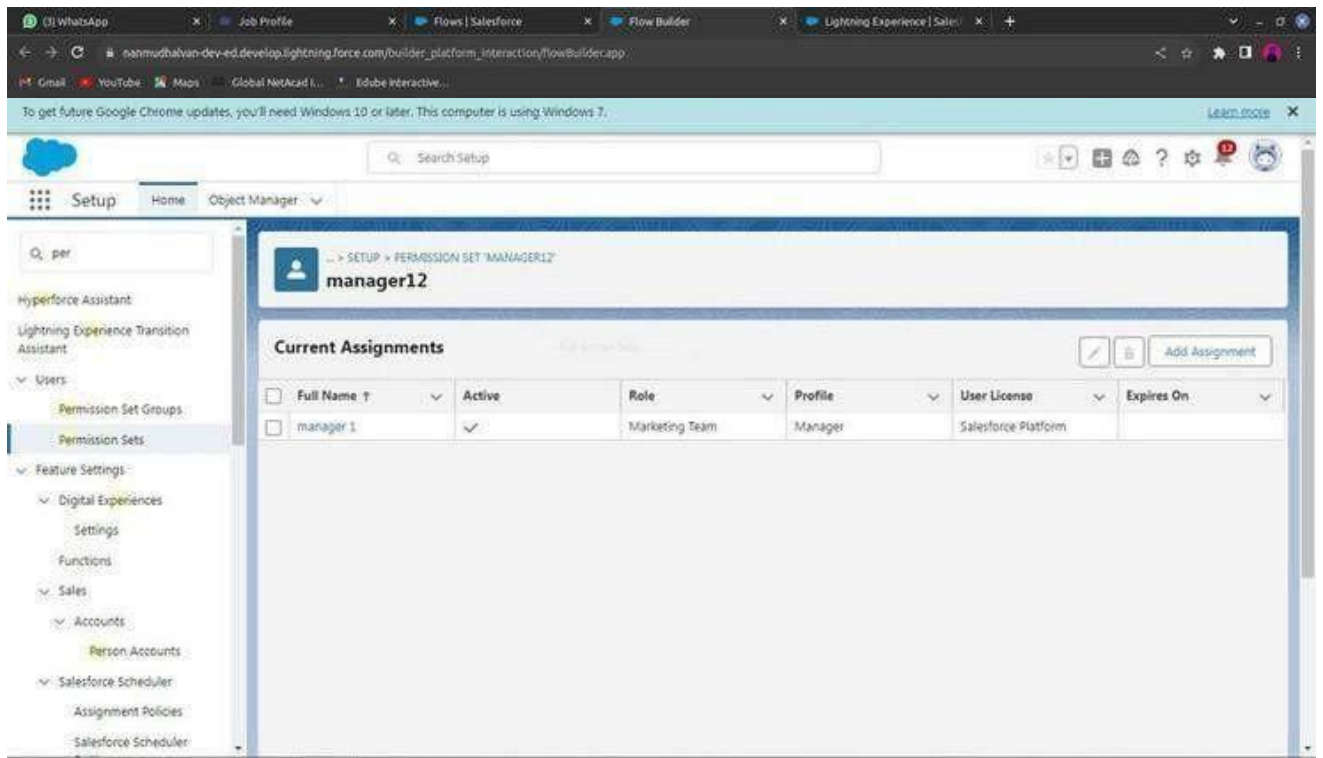
Select a time zone...

Selected Users

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

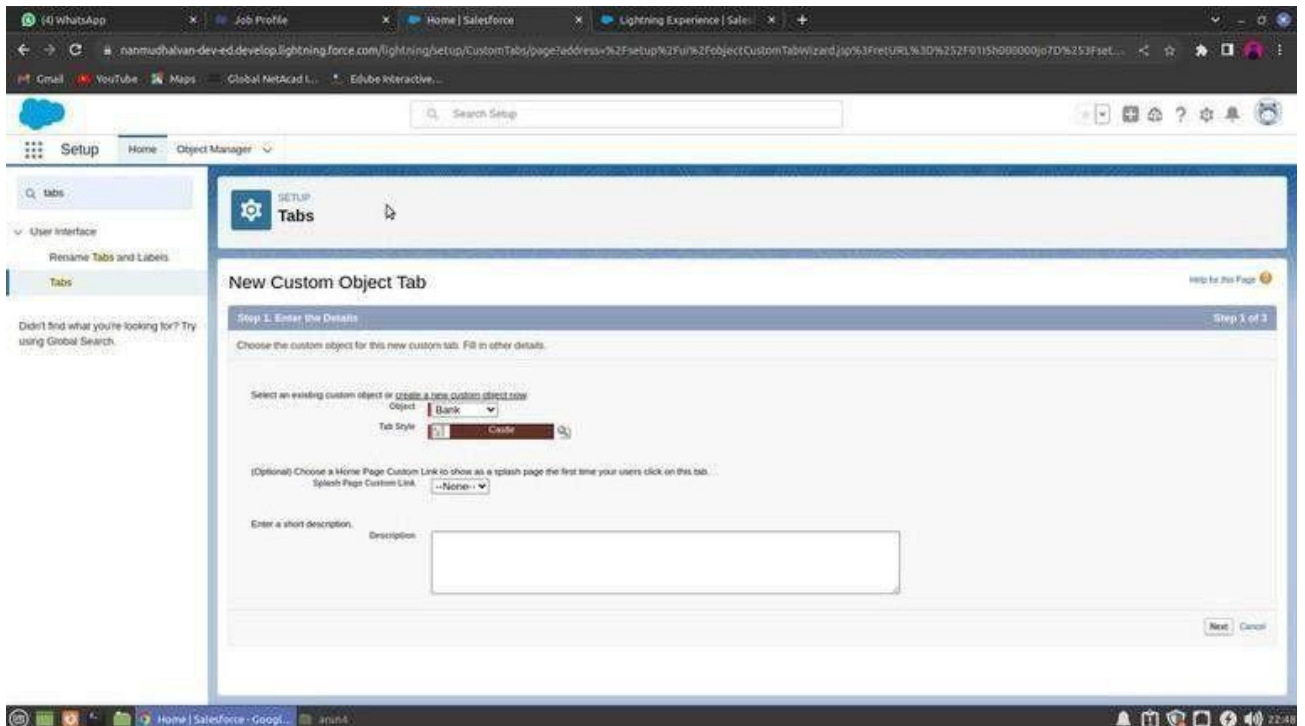
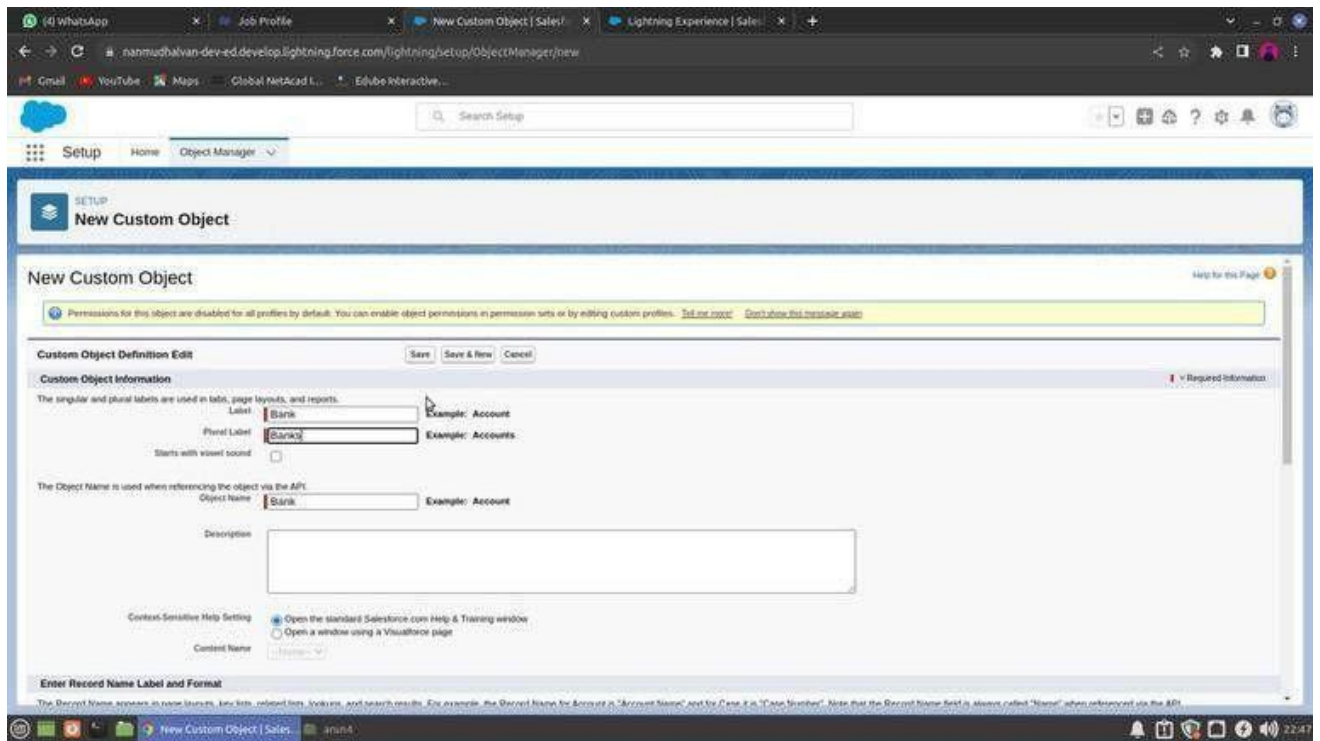
Cancel Back Assign

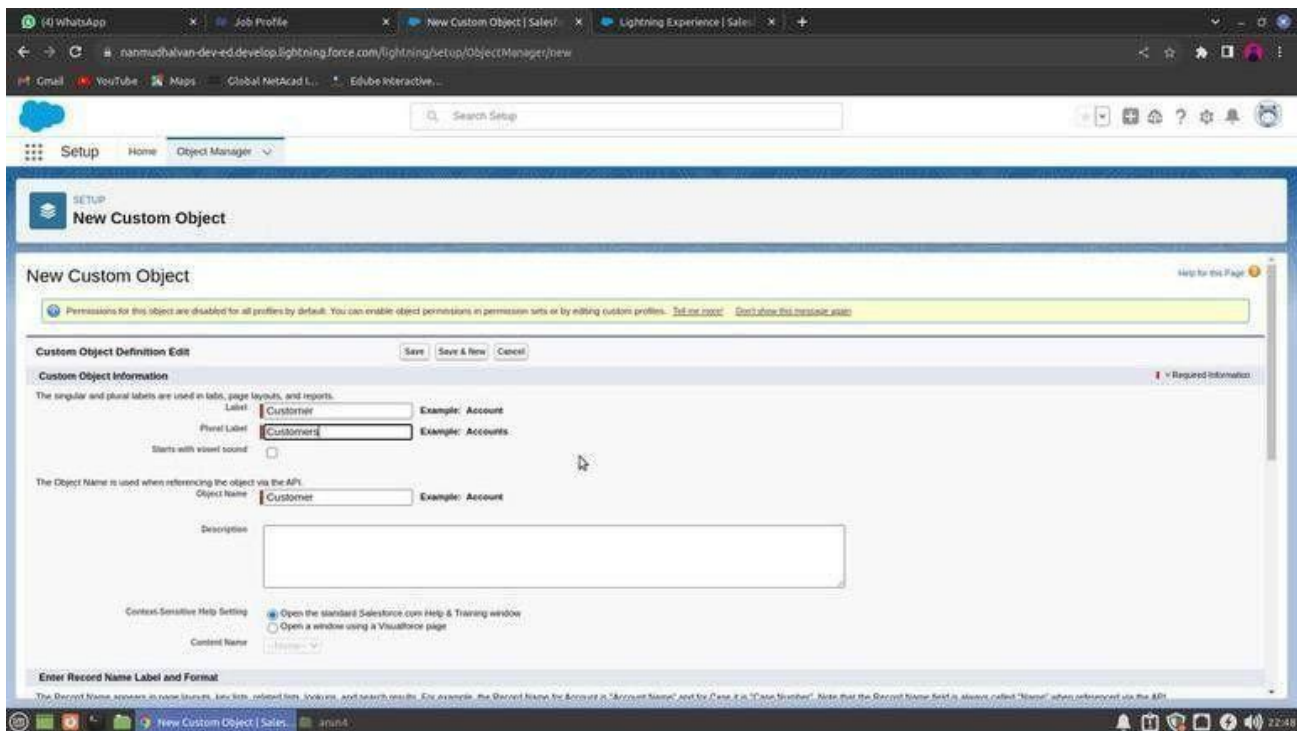
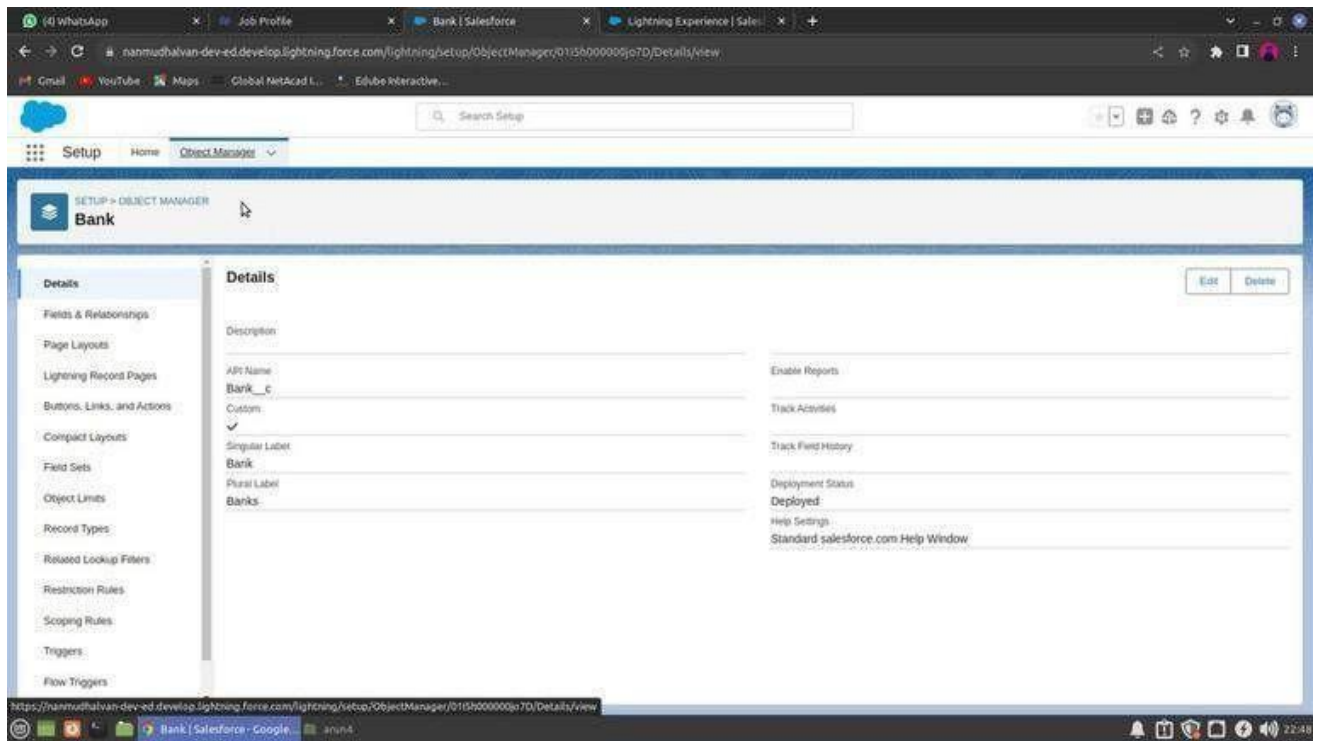


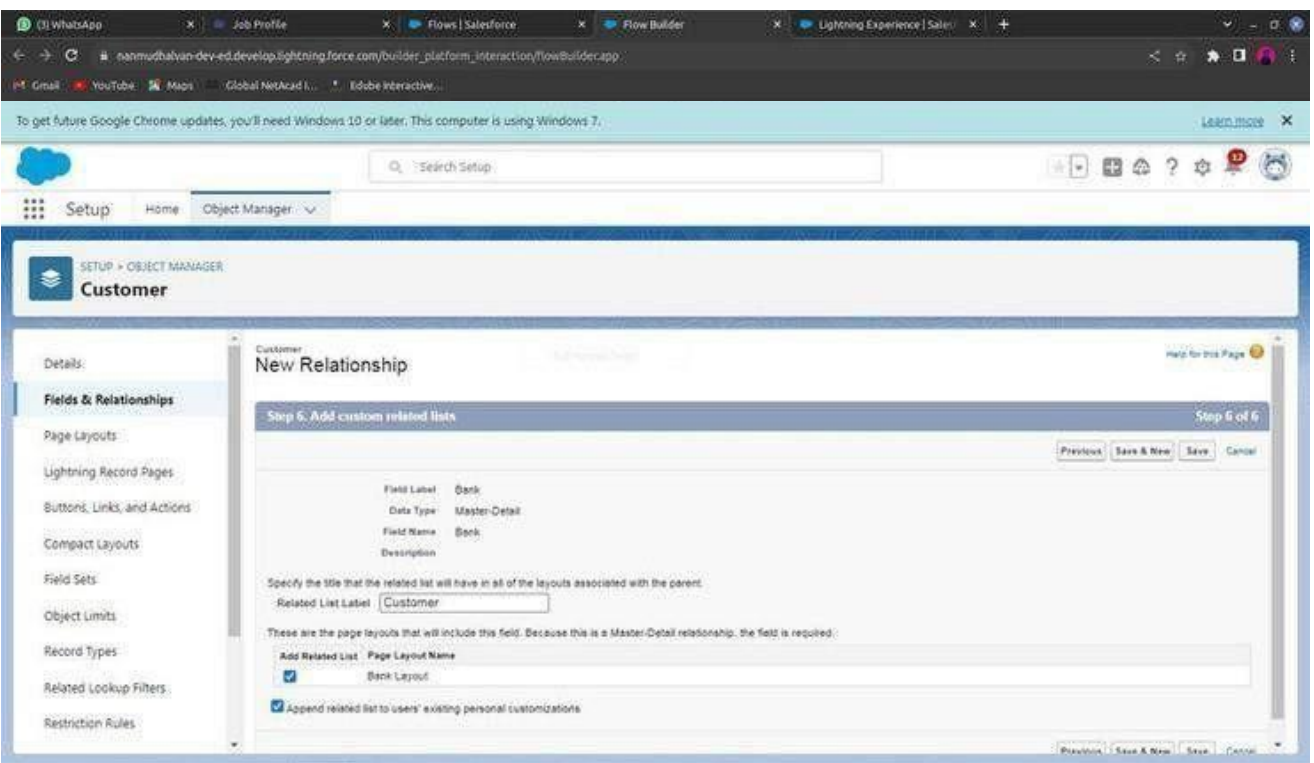
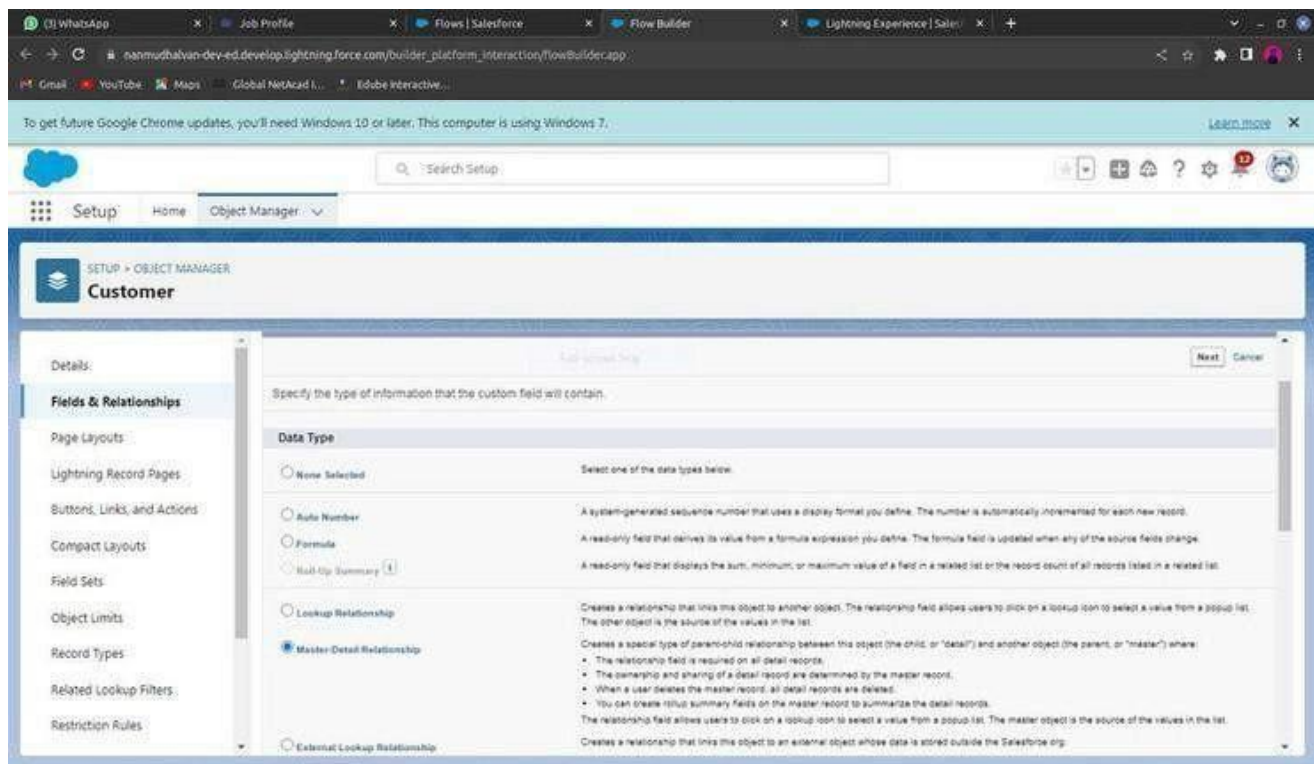


4. Create a screen flow for a basic survey to fill in the details for any form.











**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](#)

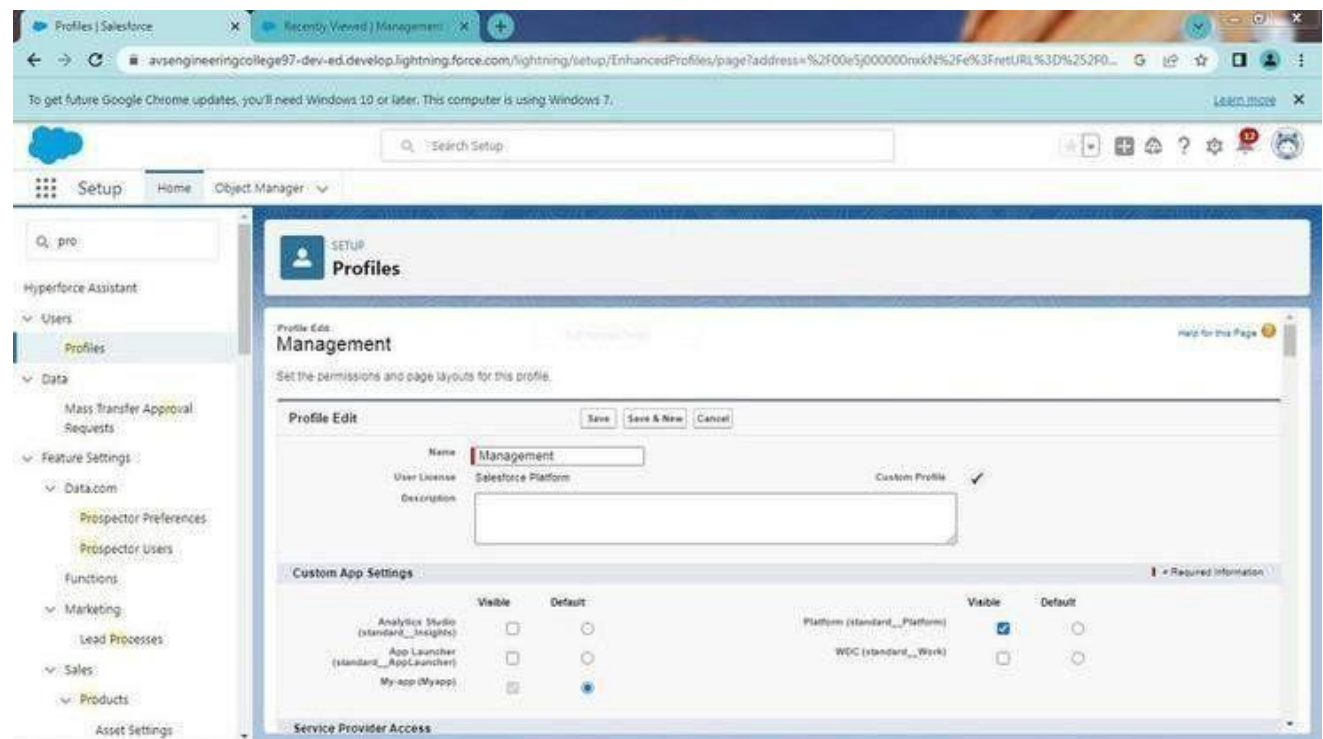
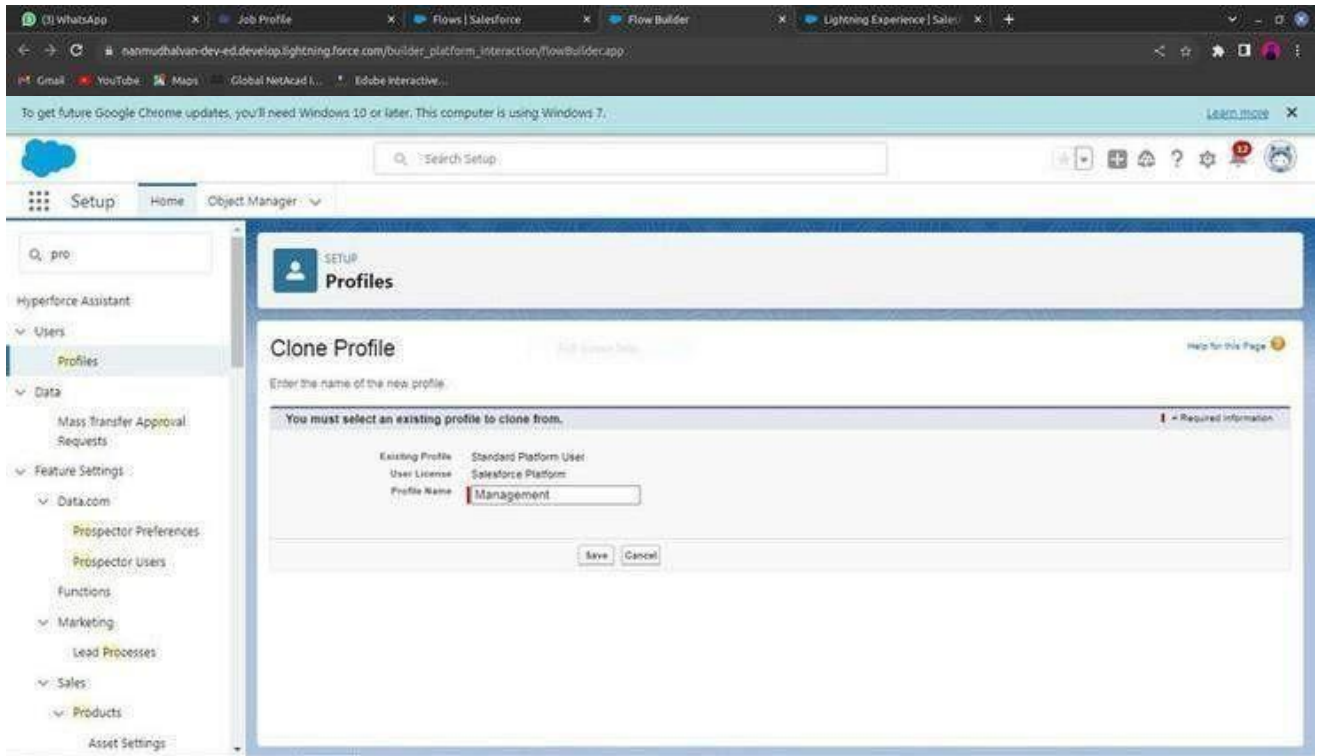
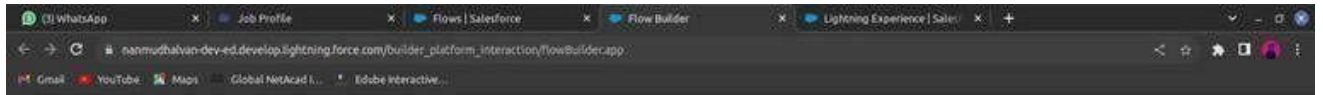
**Profile Detail**

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**

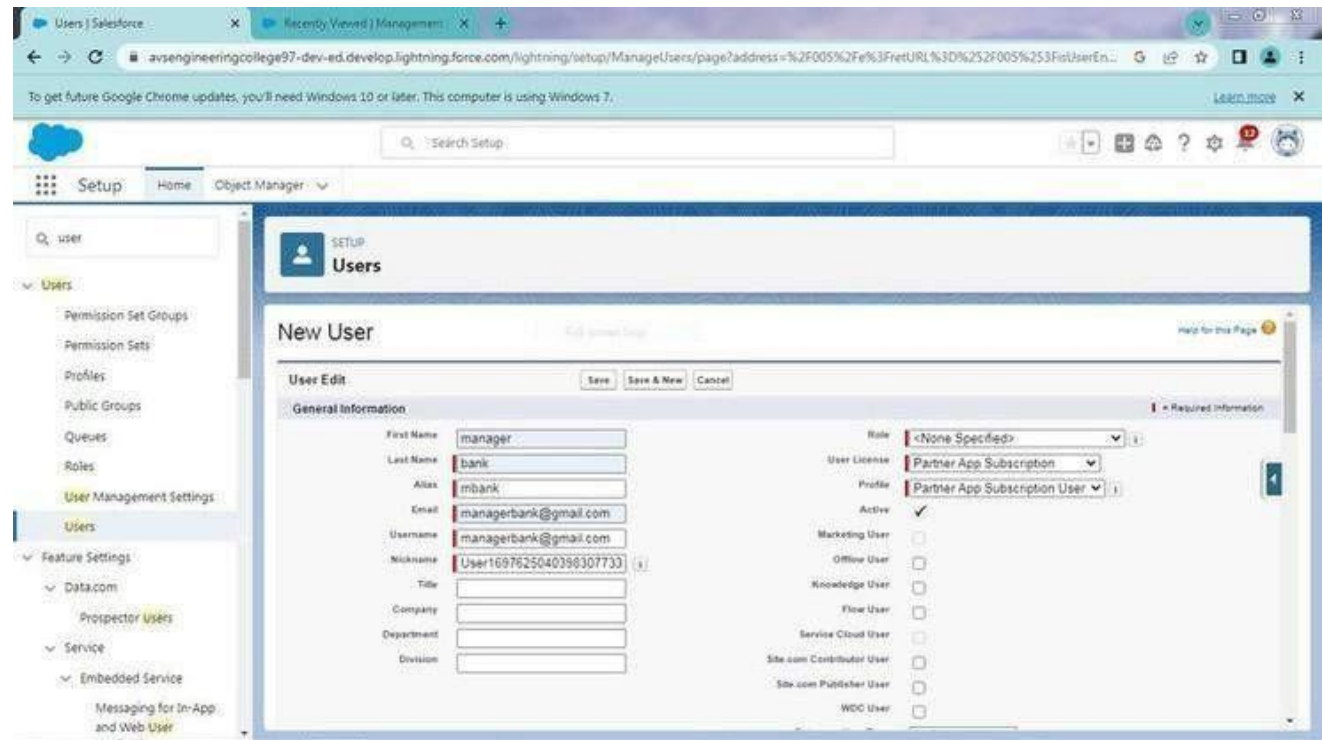
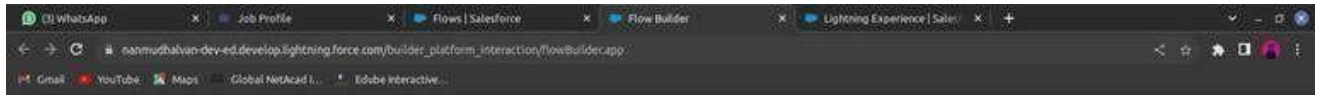
Standard Object Layouts	Global	Object Milestone	Operating Hours	Order
Global Layout	<a href="#">View Assignment</a>	Object Milestone Layout	Operating Hours Layout	Order Layout
Email Application	Not Assigned			
Home Page Layout	Home Page Default			

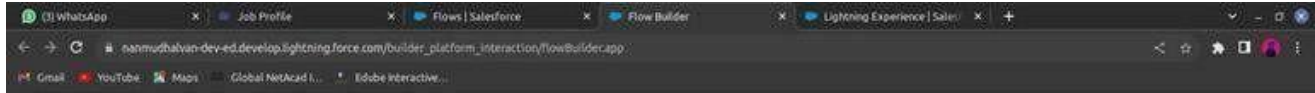












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Search Setup

Setup Home Object Manager

Q: prof

Users

Profiles

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

## SETUP Profiles

Profile Edit [Full-Featured Setup](#) [Help for this Page](#)

### Sales Manager

Set the permissions and page layouts for this profile.

**Profile Edit** [Save](#) [Save & New](#) [Cancel](#)

Name:

User License:

Custom Profile: ☒

Description:

**Custom App Settings** [+ Required Information](#)

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

**Service Provider Access**



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"/>

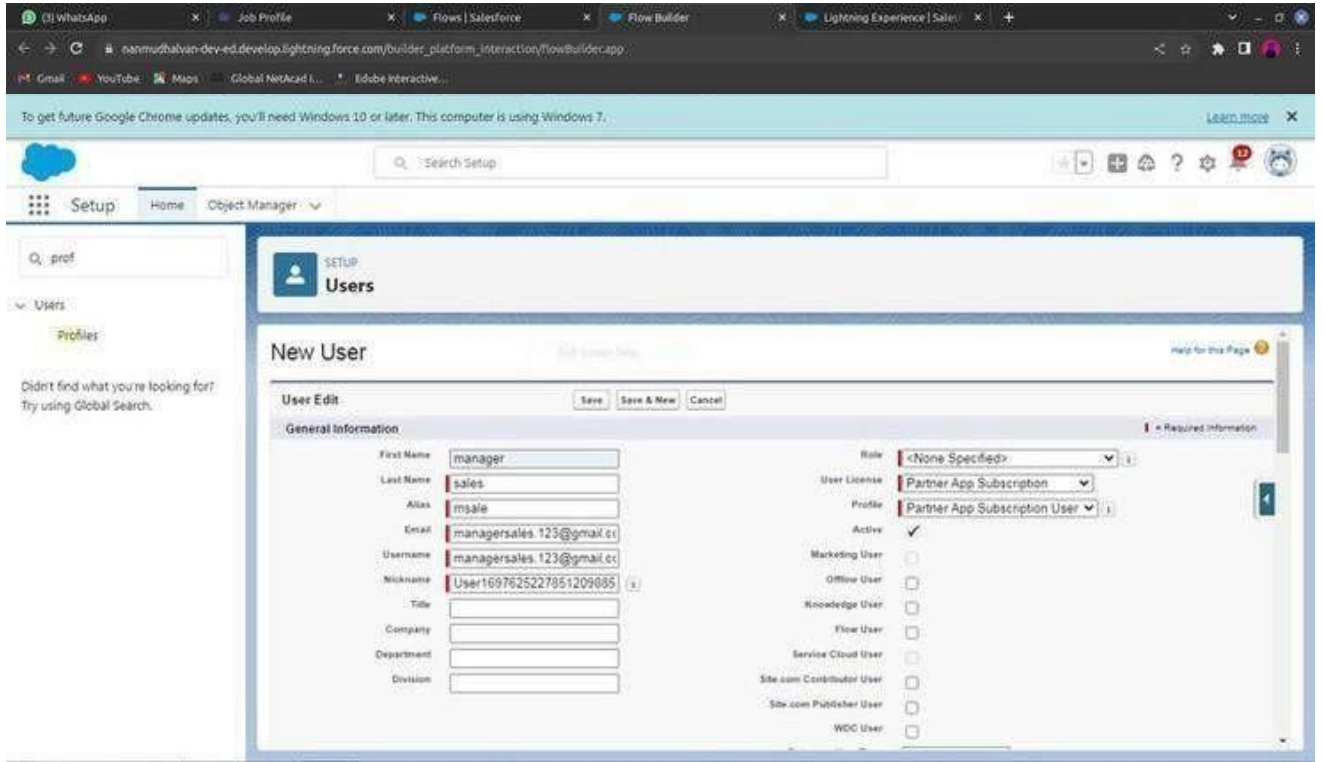
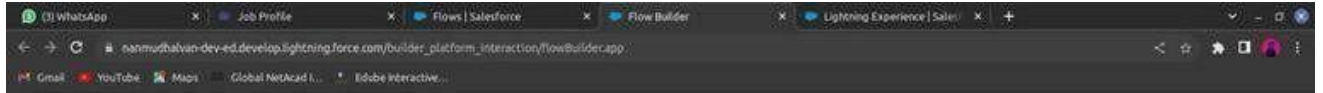
#### Session Settings

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](#)

Search Setup

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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
License		Namespace Prefix	
Session Activation Required	<input type="checkbox"/>	Created By	apex, 10/10/2023, 4:06 pm
Permission Set Groups Added To	0	Last Modified By	apex, 10/10/2023, 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 checked="" 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.