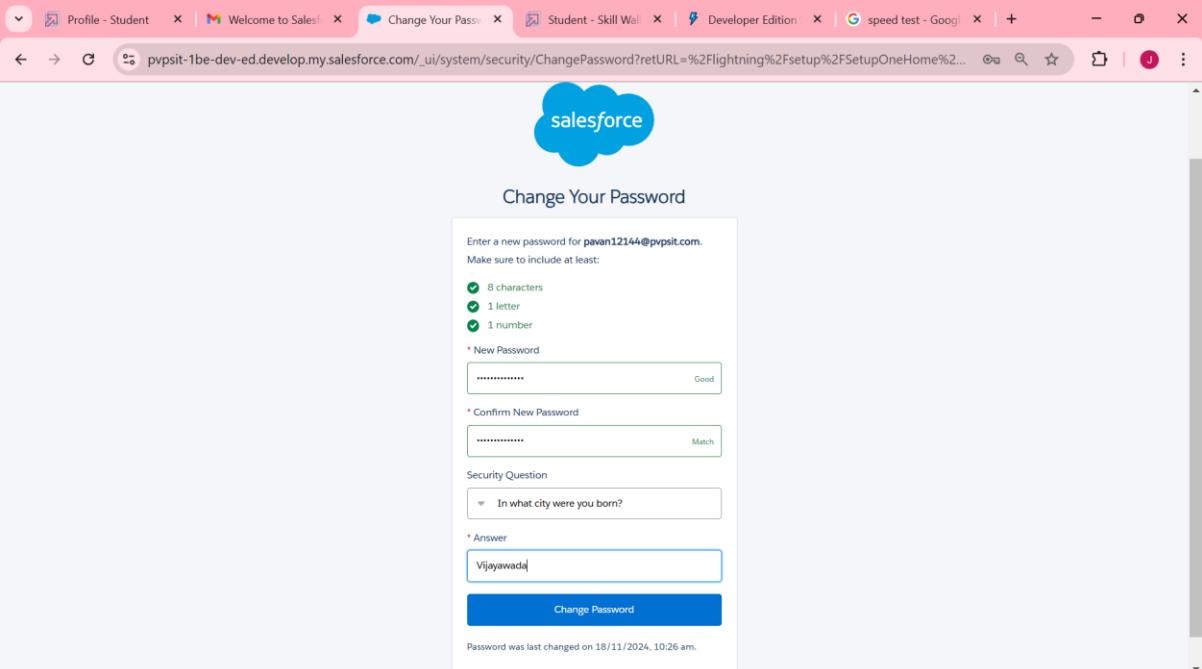


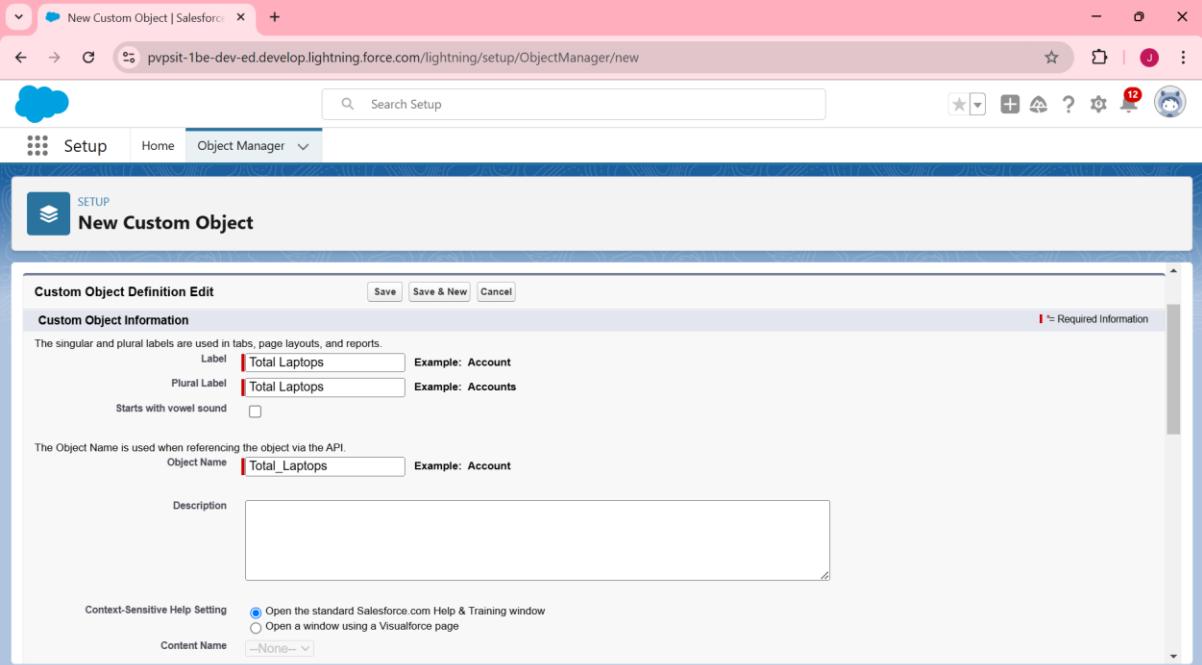
Laptop Rental App

Step : Sign up into salesforce.com using credentials and activate the account.



The screenshot shows the 'Change Your Password' page in the Salesforce interface. The URL is pvpst-1be-dev-ed.my.salesforce.com/_ui/system/security/ChangePassword?retURL=%2Flightning%2Fsetup%2FSetupOneHome%2.... The page title is 'Change Your Password'. It prompts the user to enter a new password for `pavan12144@pvpst.com`, specifying requirements: 8 characters, 1 letter, and 1 number. The 'New Password' field is marked as 'Good'. The 'Confirm New Password' field is marked as 'Match'. A 'Security Question' section asks 'In what city were you born?' with the answer 'Vijayawada' entered. An 'Answer' field is also present. A blue 'Change Password' button is at the bottom. A note at the bottom states 'Password was last changed on 18/11/2024, 10:26 am.'

Step: Creating Total Laptop object.



The screenshot shows the 'New Custom Object' page in the Salesforce Setup interface. The URL is pvpst-1be-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new. The page title is 'New Custom Object'. The 'Custom Object Definition Edit' screen displays the 'Custom Object Information' section. The 'Label' field contains 'Total Laptops' with an example 'Account'. The 'Plural Label' field contains 'Total Laptops' with an example 'Accounts'. There is a checkbox for 'Starts with vowel sound' which is unchecked. The 'Object Name' field contains 'Total_Laptops' with an example 'Account'. The 'Description' field is empty. Under 'Context-Sensitive Help Setting', the radio button for 'Open the standard Salesforce.com Help & Training window' is selected. The 'Content Name' dropdown is set to 'None'. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'.

New Custom Object | Salesforce

pvpst-1be-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new

SETUP

New Custom Object

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: Total Laptops Example: Account Name

Data Type: Text Warning: If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.

Optional Features

Allow Reports
 Allow Activities
 Track Field History
 Allow in Chatter Groups
 Enable Licensing

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more](#).

Allow Sharing
 Allow Bulk API Access
 Allow Streaming API Access

Deployment Status

What is this?

New Custom Object | Salesforce

pvpst-1be-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new

SETUP

New Custom Object

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more](#).

Allow Sharing
 Allow Bulk API Access
 Allow Streaming API Access

Deployment Status

In Development Deployed

Search Status

When this setting is enabled, your users can find records of this object type when they search. [Learn more](#).

Allow Search

Object Creation Options (Available only when custom object is first created)

Add Notes and Attachments related list to default page layout
 Launch New Custom Tab Wizard after saving this custom object

Save Save & New Cancel

Step: Creating Consumer Object.

The screenshot shows the 'New Custom Object' page in the Salesforce Setup interface. The URL is pvpst1be-dev-ed.lightning.force.com/lightning/setup/ObjectManager/new. The page title is 'New Custom Object'. The 'Custom Object Definition Edit' section contains the following fields:

- Custom Object Information**:
 - Label: consumer
 - Plural Label: consumer
 - Example: Account
 - Example: Accounts
 - Starts with vowel sound:
- The Object Name is used when referencing the object via the API.
 - Object Name: consumer
 - Example: Account
- Description: (Empty text area)

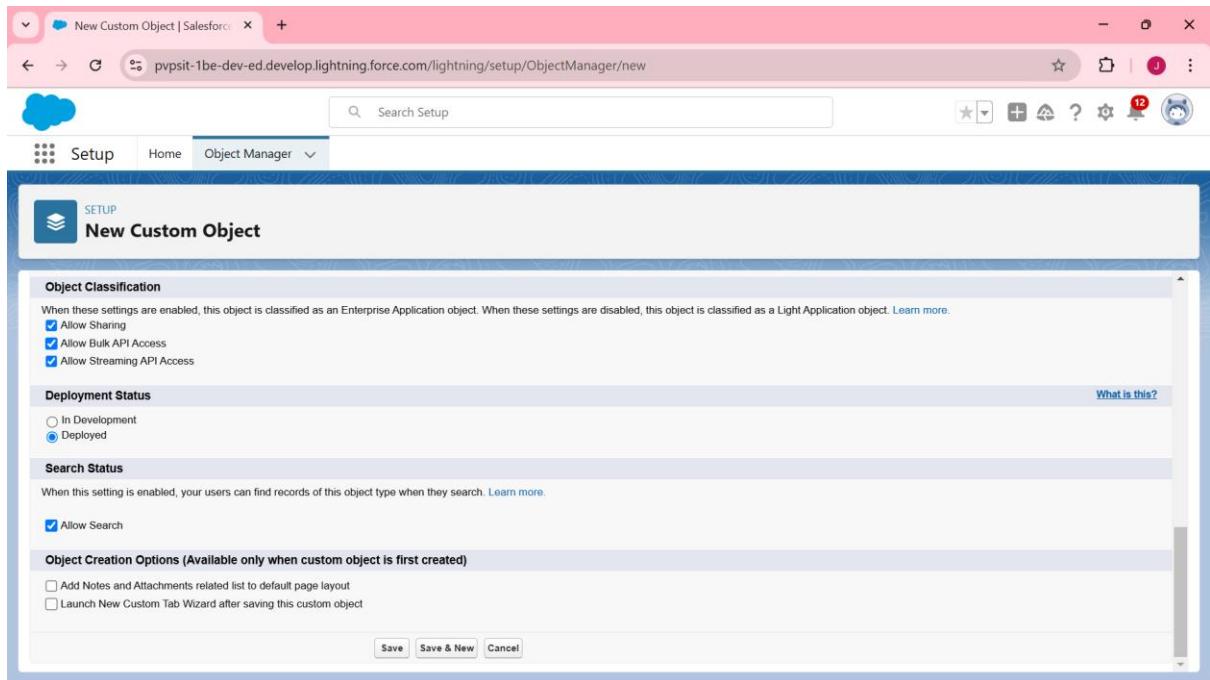
At the top right, there are 'Save', 'Save & New', and 'Cancel' buttons. A yellow banner at the top indicates: "Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more!](#) [Don't show this message again](#)".

The screenshot shows the continuation of the 'New Custom Object' page. The URL is pvpst1be-dev-ed.lightning.force.com/lightning/setup/ObjectManager/new. The page title is 'New Custom Object'. The 'Custom Object Definition Edit' section continues with:

- Context-Sensitive Help Setting**:
 - Open the standard Salesforce.com Help & Training window
 - Open a window using a Visualforce page
- Content Name**: -None-
- Enter Record Name Label and Format**:

The Record Name appears in 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: consumer_name
 - Example: Account Name
- Data Type**: Text **Warning:** If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.
- Optional Features**:
 - Allow Reports
 - Allow Activities
 - Track Field History
 - Allow in Chatter Groups
 - Enable Licensing
- Object Classification**: When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more](#).



Step: Laptop Booking Object.

New Custom Object | Salesforce

pvpst-1be-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new

Setup Home Object Manager

New Custom Object

Help for this Page

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

Custom Object Definition Edit

Custom Object Information

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

Label: Laptop Bookings Example: Account

Plural Label: Laptop Bookings Example: Accounts

Starts with vowel sound

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

Object Name: Laptop_Bookings Example: Account

Description:

Save Save & New Cancel

Required Information

New Custom Object | Salesforce

pvpst-1be-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new

Setup Home Object Manager

New Custom Object

Context-Sensitive Help Setting

Open the standard Salesforce.com Help & Training window

Open a window using a Visualforce page

Content Name: -None-

Enter Record Name Label and Format

The Record Name appears in 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: Laptop Bookings Example: Account Name

Data Type: Text **Warning:** If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.

Optional Features

Allow Reports

Allow Activities

Track Field History

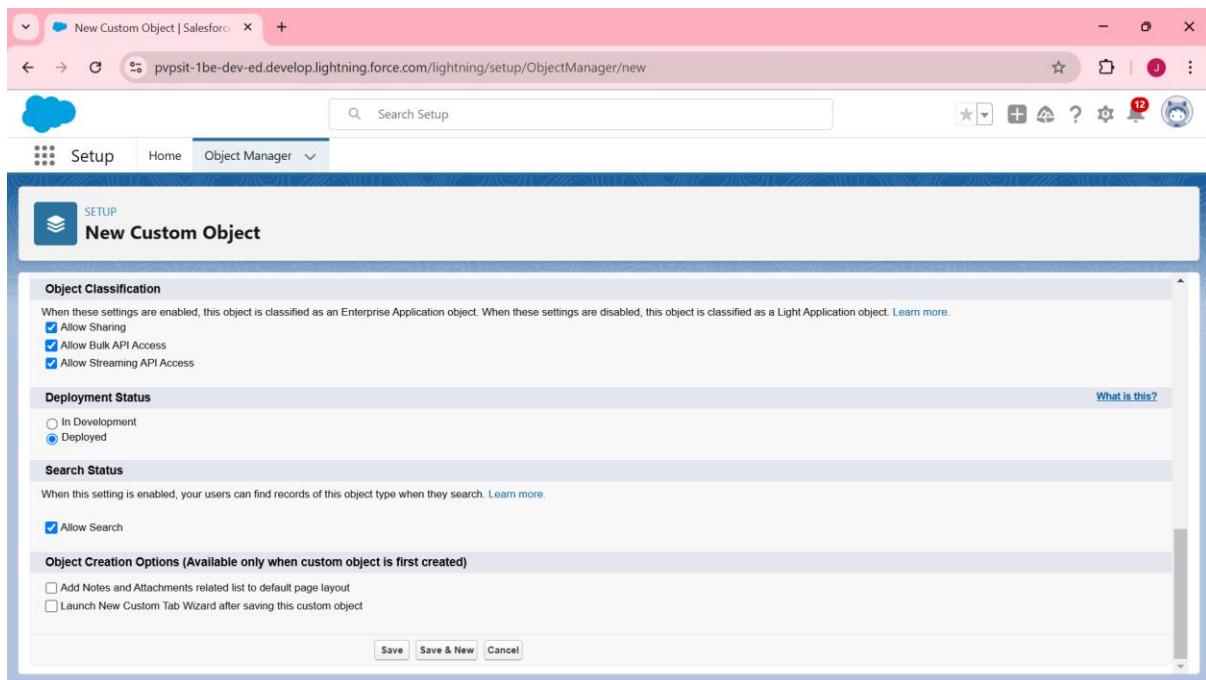
Allow in Chatter Groups

Enable Licensing

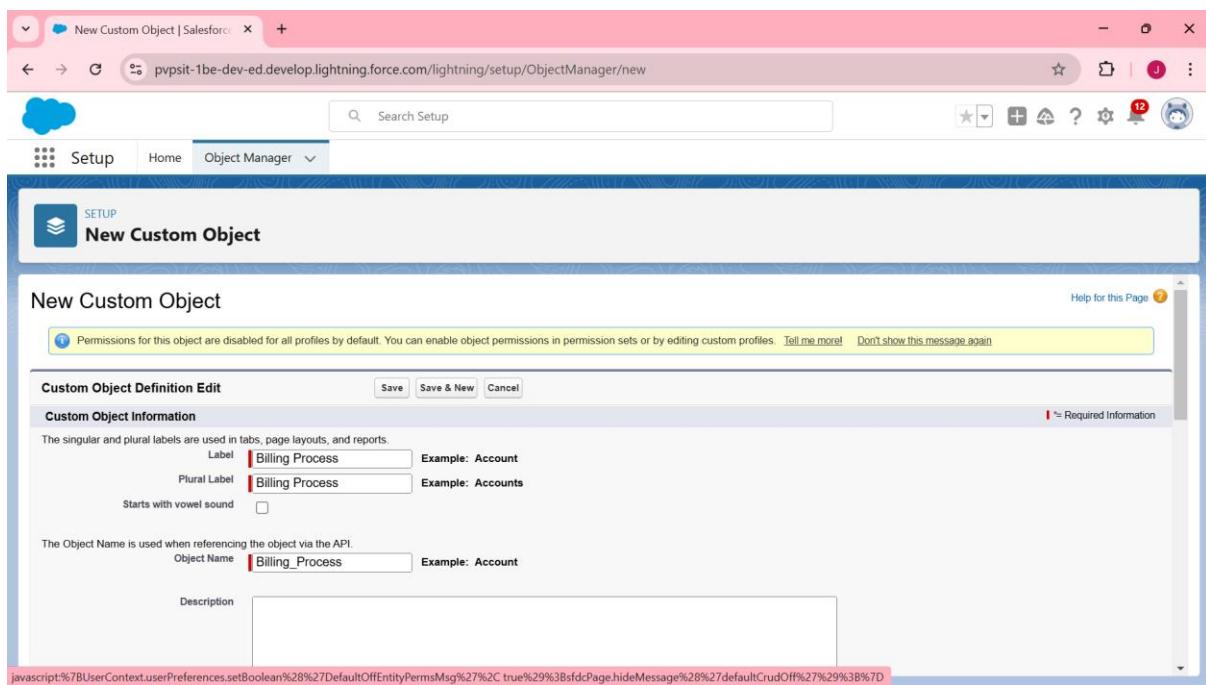
Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more](#).

Allow Sharing



Step: Creating Billing process Object.



New Custom Object | Salesforce

pvpst-1be-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new

Setup Home Object Manager

SETUP New Custom Object

Context-Sensitive Help Setting
Record Name: Billing ProcessName Example: Account Name
Content Name: None

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: Billing ProcessName Example: Account Name
Data Type: Text Warning: If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.

Optional Features
 Allow Reports
 Allow Activities
 Track Field History
 Allow in Chatter Groups
 Enable Licensing

Object Classification
When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more](#).

Allow Sharing

New Custom Object | Salesforce

pvpst-1be-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new

Setup Home Object Manager

SETUP New Custom Object

Object Classification
When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more](#).

Allow Sharing
 Allow Bulk API Access
 Allow Streaming API Access

Deployment Status
 In Development
 Deployed

Search Status
When this setting is enabled, your users can find records of this object type when they search. [Learn more](#).

Allow Search

Object Creation Options (Available only when custom object is first created)

Add Notes and Attachments related list to default page layout
 Launch New Custom Tab Wizard after saving this custom object

Save Save & New Cancel

The screenshot shows the Salesforce Object Manager interface. At the top, there's a navigation bar with tabs for 'Setup', 'Home', and 'Object Manager'. Below the navigation bar, the title 'SETUP > OBJECT MANAGER' and the object name 'Billing Process' are displayed. On the left, a sidebar lists various configuration options like 'Fields & Relationships', 'Page Layouts', and 'Record Types'. The main content area is titled 'Details' and contains fields for 'API Name' (set to 'Billing_Process__c'), 'Description' (empty), and other settings such as 'Enable Reports' (checked), 'Track Activities' (unchecked), and 'Deployment Status' (set to 'Deployed'). Buttons for 'Edit' and 'Delete' are located at the top right of the details section.

Step: Tabs.

The screenshot shows the Salesforce search interface. At the top, there's a navigation bar with tabs for 'Setup', 'Home', and 'Object Manager'. Below the navigation bar, a search bar contains the text 'tabs'. The main content area displays a search result for 'Tabs' under the 'User Interface' category. The result includes a link to 'Rename Tabs and Labels'. A large blue sidebar on the right features a house icon and a back arrow icon.

tabs

User Interface

Rename Tabs and Labels

Tabs

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

The screenshot shows the Salesforce Setup interface with the 'Tabs' page selected. The top navigation bar includes tabs for 'Profile - Student', 'Welcome to Sales...', 'Home | Salesforce', 'Student - Skill Wall', 'Tabs | Salesforce', and 'speed test - Google'. The main content area is titled 'Custom Tabs' and contains sections for 'Custom Object Tabs', 'Web Tabs', 'Visualforce Tabs', and 'Lightning Component Tabs'. Each section has a 'New' button and a 'What Is This?' link. A sidebar on the left lists 'User Interface' options: 'Rename Tabs and Labels' (selected) and 'Tabs'. A search bar at the top is empty.

The screenshot shows the 'New Custom Object Tab' wizard, Step 1: Choose Object. The top navigation bar is identical to the previous screenshot. The main content area is titled 'New Custom Object Tab' and includes fields for 'Object' (set to 'Total Laptops') and 'Tab Style' (set to 'Laptop'). It also includes an optional 'Splash Page Custom Link' field set to '-None--'. A note at the bottom says '(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.' A 'Description' field is present with a large empty text area. A 'Next' button is visible at the bottom right.

The screenshot shows the Salesforce Setup interface with the 'Tabs' tab selected. The main content area is titled 'Custom Tabs' and contains three sections: 'Custom Object Tabs', 'Web Tabs', and 'Visualforce Tabs'. The 'Custom Object Tabs' section shows a table with one entry: 'Total Laptops' (Label) under 'Tab Style' 'Laptop'. The 'Web Tabs' and 'Visualforce Tabs' sections both show a message stating 'No [Type] Tabs have been defined'.

Action	Label	Tab Style	Description
Edit Del	Total Laptops	Laptop	

The screenshot shows the 'New Custom Object Tab' configuration page. The top navigation bar includes tabs for 'Profile', 'Object', 'Label', and 'Tab Style'. The main content area is titled 'New Custom Object Tab' and is divided into 'Step 2. Add to Profiles' and 'Step 3. Set Tab Style'. Under 'Step 2', it says 'Choose the user profiles for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each profile.' A radio button is selected for 'Apply one tab visibility to all profiles' (Default On). The 'Profile' section lists several user profiles, and the 'Tab Visibility' section shows 'Default On' for all listed profiles.

Salesforce Setup - Tabs

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

New Custom Object Tab

Select an existing custom object or [create a new custom object now](#)

Object: consumer

Tab Style: People

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

Splash Page Custom Link: None

Enter a short description.

Description:

Next Cancel

User Interface

Rename Tabs and Labels

Tabs

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

Search Setup

Setup Home Object Manager

Custom Tabs | Salesforce

pvpst-1be-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2FobjectCustomTabWizard.jsp%3FretUR... 12

Salesforce Setup - Tabs

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

New Custom Object Tab

Select an existing custom object or [create a new custom object now](#)

Object: Billing Process

Tab Style: Shopping Cart

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

Splash Page Custom Link: None

Enter a short description.

Description:

Next Cancel

User Interface

Rename Tabs and Labels

Tabs

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

Search Setup

Setup Home Object Manager

Custom Tabs | Salesforce

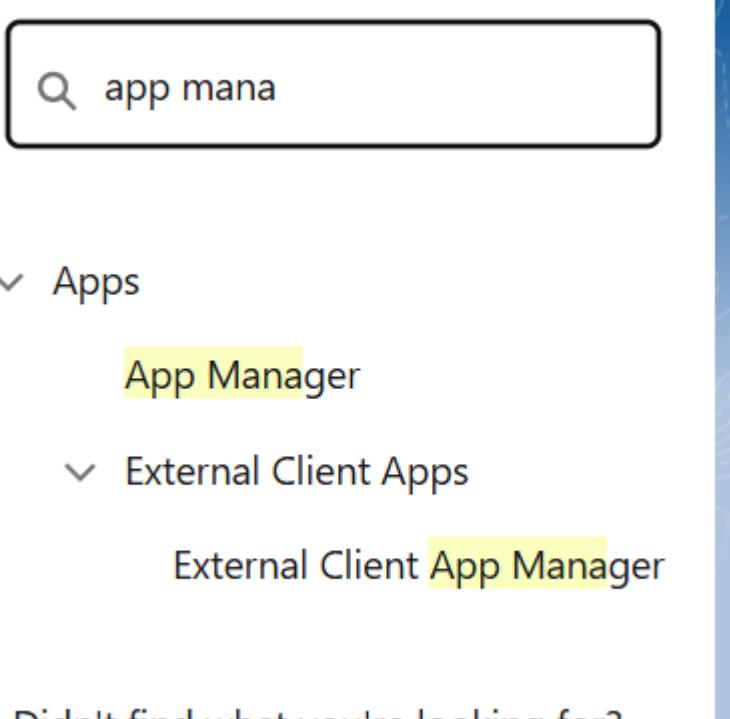
pvpst-1be-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2FobjectCustomTabWizard.jsp%3FretUR... 12

The screenshot shows the Salesforce Setup interface with the 'Tabs' tab selected. The main content area displays a form for creating a new custom object tab. The 'Object' dropdown is set to 'Laptop Bookings'. The 'Tab Style' is set to 'Presenter'. A note indicates that an optional splash page custom link can be chosen. The 'Description' field is empty. Navigation buttons 'Next' and 'Cancel' are visible at the bottom right.

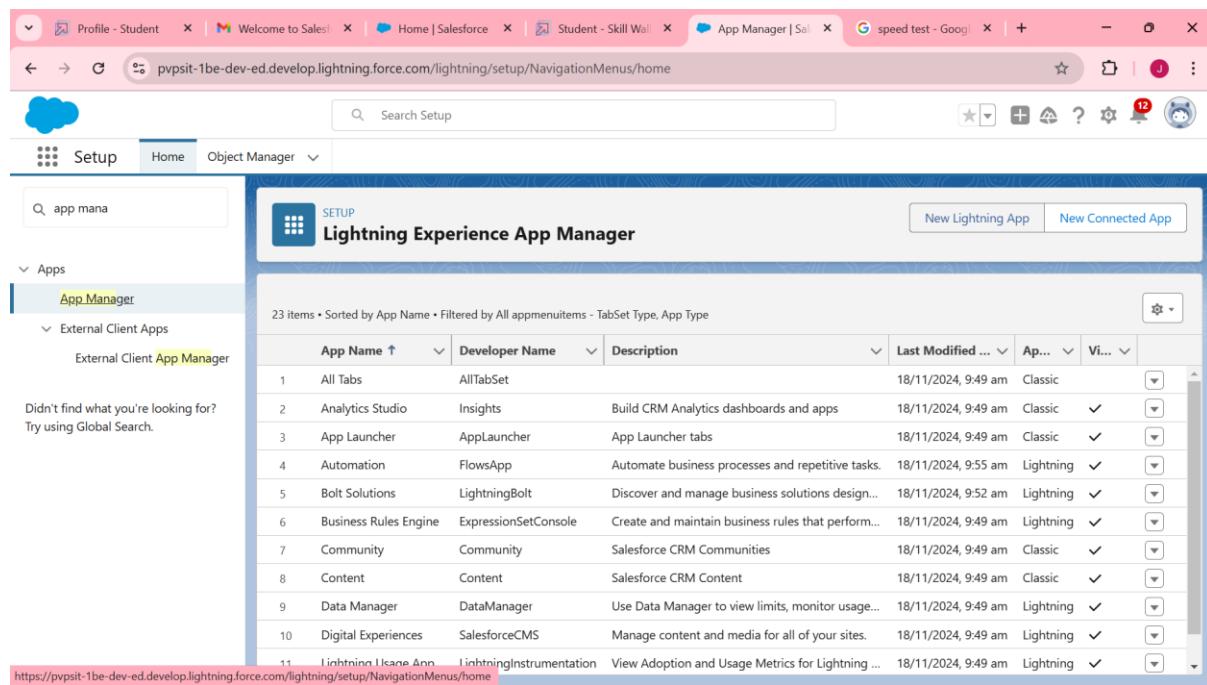
The screenshot shows the Salesforce Setup interface with the 'Custom Tabs' tab selected. The main content area displays a table of existing custom object tabs. The table includes columns for Action, Label, Tab Style, and Description. The tabs listed are: Billing Process (Shopping Cart), consumer (People), Laptop Bookings (Presenter), and Total Laptops (Laptop). A note states that no web tabs have been defined.

Action	Label	Tab Style	Description
Edit Del	Billing Process	Shopping Cart	
Edit Del	consumer	People	
Edit Del	Laptop Bookings	Presenter	
Edit Del	Total Laptops	Laptop	

Step: Creating Lightning App



The screenshot shows the Salesforce App Manager interface. At the top, there is a search bar with the placeholder text "app mana". Below the search bar, the navigation tree is visible, showing categories like "Apps" and "External Client Apps". Under "External Client Apps", the "External Client App Manager" is highlighted. A message "Didn't find what you're looking for? Try using Global Search." is displayed at the bottom of the tree.



The screenshot shows the "Lightning Experience App Manager" page within the Salesforce Setup. The URL in the browser is <https://pvpsit-1be-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home>. The page displays a list of 23 items, sorted by App Name. The columns include App Name, Developer Name, Description, Last Modified, Type, and Status. The items listed are:

App Name	Developer Name	Description	Last Modified	Type	Status
All Tabs	AllTabSet	Build CRM Analytics dashboards and apps	18/11/2024, 9:49 am	Classic	✓
Analytics Studio	Insights	Discover and manage business solutions design...	18/11/2024, 9:49 am	Classic	✓
App Launcher	AppLauncher	App Launcher tabs	18/11/2024, 9:49 am	Classic	✓
Automation	FlowsApp	Automate business processes and repetitive tasks.	18/11/2024, 9:55 am	Lightning	✓
Bolt Solutions	LightningBolt	Create and maintain business rules that perform...	18/11/2024, 9:52 am	Lightning	✓
Business Rules Engine	ExpressionSetConsole	Salesforce CRM Communities	18/11/2024, 9:49 am	Lightning	✓
Community	Community	Salesforce CRM Content	18/11/2024, 9:49 am	Classic	✓
Content	Content	Use Data Manager to view limits, monitor usage...	18/11/2024, 9:49 am	Classic	✓
Data Manager	DataManager	Manage content and media for all of your sites.	18/11/2024, 9:49 am	Lightning	✓
Digital Experiences	SalesforceCMS	View Adoption and Usage Metrics for Lightning ...	18/11/2024, 9:49 am	Lightning	✓
Lightning Usage App	LightningInstrumentation		18/11/2024, 9:49 am	Lightning	✓

Screenshot of the "New Lightning App" configuration screen.

App Details

- * App Name: LAPTOP RENTALS
- * Developer Name: LAPTOP_RENTALS
- Description: Enter a description...

App Branding

- Image: A thumbnail image of a laptop.
- Primary Color Hex: #0070D2
- Org Theme Options: Use the app's image and color instead of the org theme.

Next

Screenshot of the "App Options" configuration screen.

Navigation and Form Factor

- * Navigation Style: Standard navigation (selected)
- Supported Form Factors: Desktop and phone (selected)

Setup and Personalization

- Setup Experience: Setup (full set of Setup options) (selected)
- App Personalization Settings:
 - Disable end user personalization of nav items in this app
 - Disable temporary tabs for items outside of this app
 - Use Omni-Channel sidebar

Back **Next**

Profile - Student | Welcome to Sales| Home | Salesforce | Student - Skill Wall | App Manager | Sa| laptop images - G

pvpst-1be-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home

New Lightning App

Utility Items (Desktop Only)

Give your users quick access to productivity tools and add background utility items to your app.

Add Utility Item Utility Bar Alignment: Default

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

Back Next

9	Data Manager	Salesforce Data Manager	Use Data Manager to view limits, monitor usage...	10/11/2024, 9:45 am	Lightning
10	Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	10/11/2024, 9:49 am	Lightning
11	Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning ...	10/11/2024, 9:49 am	Lightning

New Lightning App

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

Available Items Selected Items

billin

Total Laptops
consumer
Laptop Bookings
Billing Process

Back Next

New Lightning App

User Profiles

Choose the user profiles that can access this app.

Available Profiles Selected Profiles

syste

Salesforce API Only System Integrations

System Administrator

Back Save & Finish

Screenshot of the Lightning Experience App Manager setup page.

The URL is pvpst-1be-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home.

The search bar shows "app mana".

The main content area is titled "Lightning Experience App Manager" and displays a table of 24 items, sorted by App Name. The columns include App Name, Developer Name, Description, Last Modified, App Type, and Version.

App Name	Developer Name	Description	Last Modified	App Type	Version
Analytics Studio	Insights	Build CRM Analytics dashboards and apps	18/11/2024, 9:49 am	Classic	✓
App Launcher	AppLauncher	App Launcher tabs	18/11/2024, 9:49 am	Classic	✓
Automation	FlowsApp	Automate business processes and repetitive tas...	18/11/2024, 9:55 am	Lightning	✓
Bolt Solutions	LightningBolt	Discover and manage business solutions design...	18/11/2024, 9:52 am	Lightning	✓
Business Rules Engi...	ExpressionSetConsole	Create and maintain business rules that perform...	18/11/2024, 9:49 am	Lightning	✓
Community	Community	Salesforce CRM Communities	18/11/2024, 9:49 am	Classic	✓
Content	Content	Salesforce CRM Content	18/11/2024, 9:49 am	Classic	✓
Data Manager	DataManager	Use Data Manager to view limits, monitor usage...	18/11/2024, 9:49 am	Lightning	✓
Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	18/11/2024, 9:49 am	Lightning	✓
LAPTOP RENTALS	LAPTOP_RENTALS		18/11/2024, 11:06 am	Lightning	✓
Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning ...	18/11/2024, 9:49 am	Lightning	✓

Steps: Creating Fields

Screenshot of the Object Manager setup page.

The URL is pvpst-1be-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdM000003FZyD/FieldsAndRelationships/view.

The search bar shows "consumer".

The main content area is titled "Object Manager" and displays a table of 1 item, sorted by Label.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
consumer	consumer_c	Custom Object		18/11/2024	✓

Screenshot of the Fields & Relationships section of the Object Manager setup page for the "consumer" object.

The URL is pvpst-1be-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdM000003FZyD/FieldsAndRelationships/view.

The sidebar shows navigation links: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts.

The main content area is titled "Fields & Relationships" and displays a table of 4 items, sorted by Field Label.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
consumer_name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓

Screenshot of the Salesforce Setup Object Manager for the 'consumer' object. The user is creating a new custom field.

Step 1. Choose the field type

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

Data Type

- None Selected
- Auto Number
- Formula
- Roll-Up Summary
- Lookup Relationship

Help for this Page

Step 1

Next Cancel

Screenshot of the Salesforce Setup Object Manager for the 'consumer' object. The user has selected the 'Phone' data type for the custom field.

Fields & Relationships

- Geolocation
- Number
- Percent
- Phone
- Picklist
- Picklist (Multi-Select)
- Text
- Text Area
- Text Area (Long)
- Text Area (Rich)
- Text (Encrypted)
- Time
- URL

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

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

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

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

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

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

Allows users to enter any combination of letters and numbers.

Allows users to enter up to 256 characters on separate lines.

Allows users to enter up to 131,072 characters on separate lines.

Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.

Allows users to enter any combination of letters and numbers and store them in encrypted form.

Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:50:600" are all valid times for this field.

Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

Next Cancel

Screenshot of Step 2 of 4 in the Salesforce Object Manager setup wizard for the 'consumer' object.

Step 2. Enter the details

Field Label: Phone number

Field Name: Phone_number

Description: (empty)

Help Text: (empty)

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

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

Default Value: Show Formula Editor

Use formula syntax: Enclose text and picklist value API names in double quotes : ("the_text"), include numbers without quotes : (25), show percentages as decimals : (0.10), and express date calculations in the standard format : (Today() + 7). To reference a field from a Custom Metadata type record use: \${CustomMetadata.Type__mdt}RecordName.Field__c

Step 2 of 4

Previous Next Cancel

Screenshot of Step 3 of 4 in the Salesforce Object Manager setup wizard for the 'consumer' object.

Step 3. Establish field-level security

Field Label: Phone number

Data Type: Phone

Field Name: Phone_number

Description: (empty)

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Authenticated Website	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Authenticated Portal Buyer Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Step 3 of 4

Help for this Page ?

Previous Next Cancel

Screenshot of the Salesforce Setup interface showing the creation of a new custom field for the 'consumer' object.

Object Manager - consumer

Step 4. Add to page layouts

Field Label: Phone number
Data Type: Phone
Field Name: Phone_number

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

Add Field Page Layout Name
 consumer Layout

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

Screenshot of the Salesforce Setup interface showing the creation of a new custom field for the 'consumer' object.

Object Manager - consumer

Step 1. Choose the field type

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

Data Type

None Selected

Select one of the data types below.

- Auto Number
- Formula
- Roll-Up Summary
- Lookup Relationship
- Master-Detail Relationship

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

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

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

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

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

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

Screenshot of the Salesforce Object Manager interface showing the list of objects.

Object Manager

1 Items, Sorted by Label

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
consumer	consumer_c	Custom Object		18/11/2024	✓

Screenshot of the Salesforce Object Manager Fields & Relationships page for the 'consumer' object.

Fields & Relationships

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
consumer_name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone number	Phone_number__c	Phone		

Screenshot of the Salesforce Object Manager Fields & Relationships new page for the 'consumer' object.

Fields & Relationships

- Lookup Relationship
- Master-Detail Relationship
- External Lookup Relationship
- Checkbox
- Currency
- Date
- Date/Time
- Email
- Geolocation
- Number
- Percent
- Phone
- Picklist
- Bulklist (Multi-Select)

The 'Email' field type is selected.

Screenshot of Step 2: Enter the details for a new custom field named "Email".

Step 2. Enter the details (Step 2 of 4)

Field Label: Email
Field Name: Email
Description: (empty)
Help Text: (empty)

Required: Always require a value in this field in order to save a record
Unique: Do not allow duplicate values
External ID: Set this field as the unique record identifier from an external system
Auto add to custom report type: Add this field to existing custom report types that contain this entity

Default Value: Show Formula Editor

Screenshot of Step 3: Establish field-level security for the "Email" field.

Step 3. Establish field-level security (Step 3 of 4)

Field Label: Email
Data Type: Email
Field Name: Email
Description: (empty)

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Screenshot of the Salesforce Setup - Object Manager for the 'consumer' object. The user is on Step 4 of 4, 'Add to page layouts', for a new custom field named 'Email'. The field is defined as an Email type. The user has selected the 'consumer Layout' for this field.

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

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

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

Add Field **Page Layout Name**
consumer Layout

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

Screenshot of the Salesforce Setup - Object Manager for the 'consumer' object. The user is viewing the 'Fields & Relationships' list, which shows six fields: consumer_name, Created By, Email, Last Modified By, Owner, and Phone number.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
consumer_name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Email	Email_c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone number	Phone_number_c	Phone		

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

The left sidebar shows the 'Fields & Relationships' section selected. The right pane lists various field types:

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

Each field type has a brief description below it.

Screenshot of the Salesforce Object Manager setup page for the 'consumer' object, showing the configuration of a new field.

The left sidebar shows the 'Fields & Relationships' section selected. The right pane displays 'Step 2. Enter the details' of a new field named 'Address'. The configuration includes:

- Field Label:** Address
- Field Name:** Address
- Description:** (empty)
- Help Text:** (empty)
- Required:** Always require a value in this field in order to save a record
- Auto add to custom report type:** Add this field to existing custom report types that contain this entity (1)
- Default Value:** Show Formula Editor
Use formula syntax: Enclose text and picklist value API names in double quotes: `('the_Text')`, include numbers without quotes: `(25)`, show percentages as decimals `(0.10)`, and express date calculations in the standard format: `(Today() + 7)`. To reference a field from a Custom Metadata Type record use: `$CustomMetadata_Type__mdt.Record__PName Field__c`

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

consumer

New Custom Field

Step 3. Establish field-level security Step 3 of 4

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	✓	□
Analytics Cloud Security User	✓	□
Authenticated Website	✓	□
Authenticated Website	✓	□
B2B Reordering Portal Buyer Profile	✓	□
Contract Manager	✓	□
Cross Org Data Proxy User	✓	□
Custom: Marketing Profile	✓	□

Step: Creating the field in laptops bookings object

Laptop Bookings

Fields & Relationships 4 items, Sorted by Field Label

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

The screenshot shows the Salesforce Object Manager interface for the 'Laptop Bookings' object. The left sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The 'Fields & Relationships' section is currently selected. On the right, a detailed view of the 'Fields & Relationships' section is displayed, specifically focusing on the 'External Lookup Relationship' and 'Picklist' options. The 'Picklist' option is highlighted, showing its description: 'Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.' Below this, a list of other field types is shown with their descriptions.

The screenshot shows the process of creating a new custom field named 'Laptop names' for the 'Laptop Bookings' object. The 'Fields & Relationships' section is selected in the sidebar. The main area shows the 'Step 2. Enter the details' screen of the 'New Custom Field' wizard. The 'Field Label' is set to 'Laptop names'. In the 'Values' section, the 'Enter values, with each value separated by a new line' option is selected, and a text area contains the values 'Dell', 'Acer', 'Hp', and 'Mac'. An error message 'Error: A global picklist definition must be selected' is displayed above the text area. Other options in the 'Values' section include 'Use global picklist value set' (unchecked) and checkboxes for 'Display values alphabetically, not in the order entered' and 'Use first value as default value'. The 'Field Name' is set to 'Laptop_names' and the 'Description' field is empty.

Screenshot of the Salesforce Object Manager setup page for 'Laptop Bookings'.

Step 3. Establish field-level security

Field Label: Laptop names
Data Type: Picklist
Field Name: Laptop_names
Description:

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Authenticated Website	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Authenticated Website	<input checked="" type="checkbox"/>	<input type="checkbox"/>
B2B Reordering Portal Buyer Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Step 3 of 4

Previous Next Cancel

Screenshot of the Salesforce Object Manager setup page for 'Laptop Bookings'.

New Custom Field

Step 4. Add to page layouts

Field Label: Laptop names
Data Type: Picklist
Field Name: Laptop_names
Description:

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

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

Add Field Page Layout Name
 Laptop Bookings Layout

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

Step 4 of 4

Previous Save & New Save Cancel

Screenshot of the Salesforce Setup interface showing the Object Manager for the 'Laptop Bookings' object.

The left sidebar shows the 'Fields & Relationships' section selected. The main area displays the 'Fields & Relationships' table:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Laptop Bookings	Name	Text(80)		✓
Laptop names	Laptop_names_c	Picklist		▼
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓

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

Screenshot of the Salesforce Setup interface showing the 'Fields & Relationships' configuration for the 'Laptop Bookings' object.

The left sidebar shows the 'Fields & Relationships' section selected. The main area displays the 'External Lookup Relationship' configuration:

Selected: Picklist

Descriptions for other field types:

- Checkbox: Allows users to select a True (checked) or False (unchecked) value.
- Currency: Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
- Date: Allows users to enter a date or pick a date from a popup calendar.
- Date/Time: Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
- Email: Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
- Geolocation: Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
- Number: Allows users to enter any number. Leading zeros are removed.
- Percent: Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.
- Phone: Allows users to enter any phone number. Automatically formats it as a phone number.
- Picklist: Allows users to select a value from a list you define.
- Picklist (Multi-Select): Allows users to select multiple values from a list you define.
- Text: Allows users to enter any combination of letters and numbers.
- Text Area: Allows users to enter up to 255 characters on separate lines.
- Text Area (Long): Allows users to enter up to 131,072 characters on separate lines.
- Text Area (Rich): Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.
- Text Area (Text): Allows users to enter any combination of letters and numbers and store them in encrypted form.

Laptop Bookings
New Custom Field

Step 4. Add to page layouts Step 4 of 4

Field Label: core type
Data Type: Picklist
Field Name: core_type

Add Field - Page Layout Name
✓ Laptop Bookings Layout

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

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

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

Laptop Bookings
New Custom Field

Step 3. Establish field-level security Step 3 of 4

Field Label: core type
Data Type: Picklist
Field Name: core_type

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

Profile	Visible	Read-Only
Analytics Cloud Integration User	✓	✓
Authenticated Website	✓	✗
B2B Reordering Portal Buyer Profile	✓	✗
Contract Manager	✓	✗
Cross Org Data Proxy User	✓	✗
Custom: Marketing Profile	✓	✗
Custom: Sales Profile	✓	✗
Custom: Support Profile	✓	✗
Customer Community Login User	✓	✗
Customer Community Plus Login User	✓	✗
Customer Community Plus User	✓	✗

Step: To create a fields and relationship to an laptop booking object

Profile - Student | Welcome to Sales| Home | Salesforce | Student - Skill Wall | Home | Salesforce | laptop images - G... | +

pvsit-1be-dev-ed.develop.lightning.force.com/lightning/setup/null/page?address=%2Fp%2Fddependency%2FEditDependencyUI%2Fe%3Fr...

Setup Home Service Setup Assistant Commerce Setup Assistant Hyperforce Assistant Release Updates Lightning Experience Transition Assistant Salesforce Mobile App Lightning Usage Optimizer Sales Cloud Everywhere ADMINISTRATION > Users > Data > Email PLATFORM TOOLS > Subscription Management > Apps > Feature Settings > Slack > Heroku

SETUP Search Setup

Edit Field Dependency

Help for this Page

Controlling Field: Laptop names
Dependent Field: core type

Instructions

Legend: Excluded Value (yellow), Included Value (green)

Click button to include or exclude selected values from the dependent picklist:
Include Values Exclude Values

Showing Columns: 1 - 4 (of 4) < Previous Next > View All Go to Mac				
Laptop names:	Dell	Acer	Hp	Mac
core type:	core i3	core i3	core i3	core i3
	Core i5	Core i5	Core i5	Core i5
	Core i7	Core i7	Core i7	Core i7
	Bionic chip	Bionic chip	Bionic chip	Bionic chip

Click button to include or exclude selected values from the dependent picklist:
Include Values Exclude Values

Save Cancel Preview

Profile - Student | Welcome to Sales| Home | Salesforce | Student - Skill Wall | Home | Salesforce | laptop images - G... | +

pvsit-1be-dev-ed.develop.lightning.force.com/lightning/setup/null/page?address=%2Fp%2Fddependency%2FEditDependencyUI%2Fe%3Fr...

Setup Home Service Setup Assistant Commerce Setup Assistant Hyperforce Assistant Release Updates Lightning Experience Transition Assistant Salesforce Mobile App Lightning Usage Optimizer Sales Cloud Everywhere ADMINISTRATION > Users > Data > Email PLATFORM TOOLS > Subscription Management > Apps > Feature Settings > Slack > Heroku

SETUP Search Setup

Edit Field Dependency

Help for this Page

Controlling Field: Laptop names
Dependent Field: core type

Instructions

Legend: Excluded Value (yellow), Included Value (green)

Click button to include or exclude selected values from the dependent picklist:
Include Values Exclude Values

Showing Columns: 1 - 4 (of 4) < Previous Next > View All Go to Mac				
Laptop names:	Dell	Acer	Hp	Mac
core type:	core i3	core i3	core i3	core i3
	Core i5	Core i5	Core i5	Core i5
	Core i7	Core i7	Core i7	Core i7
	Bionic chip	Bionic chip	Bionic chip	Bionic chip

Click button to include or exclude selected values from the dependent picklist:
Include Values Exclude Values

Save Cancel Preview

SETUP > OBJECT MANAGER

Laptop Bookings

Fields & Relationships

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
core type	core_type__c	Picklist	Laptop names	
Created By	CreatedById	Lookup(User)		
Laptop Bookings	Name	Text(80)		✓
Laptop names	Laptop_names__c	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓

Step: To Create a Fields & Relationship to an Laptop Booking Object

SETUP > OBJECT MANAGER

Laptop Bookings

Fields & Relationships

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

Data Type

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.

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 a 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.

Master-Detail Relationship

External Lookup Relationship

None Selected

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.

Auto Number

Formula

Roll-Up Summary

Checkbox

Currency

Date

Date/Time

Email

Geolocation

Number

Help for this Page

Step 2. Choose the related object

Select the other object to which this object is related.

Related To:

Screenshot of Step 3: Enter the label and name for the lookup field

Laptop Bookings
New Relationship

Step 3. Enter the label and name for the lookup field

Field Label: Name
Field Name: Name
Description:
Help Text:
Child Relationship Name: Laptop_Bookings
Required: Always require a value in this field in order to save a record
What to do if the lookup record is deleted?
 Clear the value of this field. You can't choose this option if you make this field required.
 Don't allow deletion of the lookup record that's part of a lookup relationship.
Auto add to custom report type: Add this field to existing custom report types that contain this entity

Lookup Filter
Optional: create a filter to limit the records available to users in the lookup field [Tell me more!](#)

Help for this Page

Step 3 of 6

Previous Next Cancel

Screenshot of Step 4: Establish field-level security for reference field

Laptop Bookings
New Relationship

Step 4. Establish field-level security for reference field

Field Label: Name
Data Type: Lookup
Field Name: Name
Description:

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Force.com - App Subscription User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Force.com - Free User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Gold Partner User	<input type="checkbox"/>	<input type="checkbox"/>
Identity User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Marketing User	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Help for this Page

Step 4 of 6

Previous Next Cancel

Laptop Bookings

New Custom Field

Step 2. Enter the details

Field Label: Amount

Length: 18

Field Name: Amount

Description:

Help Text:

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

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

Default Value: Show Formula Editor

Use formula syntax: Enclose text and picklist value API names in double quotes: ("the_value"), include numbers without quotes (25), show percentages as decimals (0.10), and express date calculations in the standard format: (Today) + 7. To reference a field from a Custom Metadata type record use: \${CustomMetadataType__Record__Name.FieldName__c}

Help for this Page

Laptop Bookings

New Custom Field

Step 2. Enter the details

Field Label: Amount

Length: 18

Field Name: Amount

Description:

Help Text:

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

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

Default Value: Show Formula Editor

Use formula syntax: Enclose text and picklist value API names in double quotes: ("the_value"), include numbers without quotes (25), show percentages as decimals (0.10), and express date calculations in the standard format: (Today) + 7. To reference a field from a Custom Metadata type record use: \${CustomMetadataType__Record__Name.FieldName__c}

Help for this Page

Laptop Bookings

New Relationship

Step 2. Choose the related object

Select the other object to which this object is related.

Related To: Total Laptops

Step 2

Help for this Page

Screenshot of the Salesforce Object Manager - Laptop Bookings page, Step 3 of 6.

Laptop Bookings New Relationship

Step 3. Enter the label and name for the lookup field

Field Label: Total No Of Laptops
Field Name: Total_No_Of_Laptops
Description:
Help Text:

Child Relationship Name: Laptop_Bookings
Required: Always require a value in this field in order to save a record
 Clear the value of this field. You can't choose this option if you make this field required.
 Don't allow deletion of the lookup record that's part of a lookup relationship.
 Add this field to existing custom report types that contain this entity

Lookup Filter: Optionally, create a filter to limit the records available to users in the lookup field [Tell me more!](#)
[Show Filter Settings](#)

Help for this Page

Screenshot of the Salesforce Object Manager - Laptop Bookings page, Step 3 of 6.

Laptop Bookings New Relationship

Step 3. Enter the label and name for the lookup field

Field Label: Total No Of Laptops
Field Name: Total_No_Of_Laptops
Description:
Help Text:

Child Relationship Name: Laptop_Bookings
Required: Always require a value in this field in order to save a record
 Clear the value of this field. You can't choose this option if you make this field required.
 Don't allow deletion of the lookup record that's part of a lookup relationship.
 Add this field to existing custom report types that contain this entity

Lookup Filter: Optionally, create a filter to limit the records available to users in the lookup field [Tell me more!](#)
[Show Filter Settings](#)

Help for this Page

Screenshot of the Salesforce Setup interface showing the creation of a new custom field for the 'Laptop Bookings' object.

The page title is "Laptop Bookings New Custom Field".

Step 2. Enter the details

Field Label: email

Field Name: email

Description: (empty)

Help Text: (empty)

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

Unique: Do not allow duplicate values

External ID: Set this field as the unique record identifier from an external system

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

Default Value: Show Formula Editor

Use formula syntax. Enclose text and picklist value API names in double quotes ("The_Value"), include numbers without quotes (25), show percentages as decimals (.05), and express date calculations in the standard format: (Today() + 7). To reference a field from a custom metadata type record use: <CustomMetadata>.type__refRecordName.FieldName

Step 2 of 4

Buttons: Previous, Next, Cancel

Screenshot of the Salesforce Setup interface showing the addition of a new custom field to page layouts for the 'Laptop Bookings' object.

The page title is "Laptop Bookings New Custom Field".

Step 4. Add to page layouts

Field Label: email

Data Type: Email

Field Name: email

Description: (empty)

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

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

Add Field Page Layout Name

Laptop Bookings Layout

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

Step 4 of 4

Buttons: Previous, Save & New, Save, Cancel

Screenshot of the Salesforce Setup Object Manager for the Laptop Bookings object.

Laptop Bookings

Step 4. Add to page layouts (Step 4 of 4)

Field Label: email
Data Type: Email
Field Name: email

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

Add Field Page Layout Name
 Laptop Bookings Layout

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

Help for this Page

Previous Save & New Save Cancel

Fields & Relationships

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules
- Scoping Rules
- Object Access
- Triggers
- Flow Triggers

Screenshot of the Salesforce Setup Object Manager for the Total Laptops object.

Total Laptops

Step 3. Define the summary calculation (Step 3 of 5)

Required Information

Select Object to Summarize
Master Object: Total Laptops
Summarized Object: Laptop Bookings

Select Roll-Up Type
 COUNT
 SUM
 MIN
 MAX
Field to Aggregate: None

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

Help for this Page

Previous Next Cancel

Fields & Relationships

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules
- Scoping Rules
- Object Access
- Triggers
- Flow Triggers

Screenshot of the Salesforce Setup interface showing the creation of a new custom field for the 'Total Laptops' object.

Object Manager > **Total Laptops** > **New Custom Field**

Step 5. Add to page layouts (Step 5 of 5)

Field Label: Laptops delivered
Data Type: Roll-Up Summary
Field Name: Laptops_delivered

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

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

Add Field Page Layout Name
 Total Laptops Layout

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

Previous | Save & New | Save | Cancel

Screenshot of the Salesforce Setup interface showing the creation of a new custom field for the 'Laptop Bookings' object.

Object Manager > **Laptop Bookings** > **New Custom Field**

Step 2. Choose output type (Step 2 of 5)

Field Label: Laptops Available
Field Name: Laptops_Available

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

Formula Return Type:

None Selected
 Checkbox
 Currency
 Date
 DateTime
 Number
 Percent
 Text
 Time
 Options

Select one of the data types below:

Calculate a boolean value
Example: `TOGGLE([BooleanField])`

Calculate a dollar or other currency amount and automatically format the field as a currency amount
Example: `Gross Margin - Amount - Cost__c`

Calculate a date, for example, by adding or subtracting days to other dates
Example: `Reminder Date + Close Date - 7`

Calculate a datetime, for example, by adding a number of hours or days to another datetime
Example: `Next = NOW() + 1`

Calculate a numeric value
Example: `Fahrenheit = 1.8 * Celsius__c + 32`

Calculate a percent and automatically add the percent sign to the number
Example: `Discount = (Amount - Discount_Amount__c) / Amount`

Create a time, for example, by concatenating other text fields
Example: `Full Name = First Name + " " + Last Name`

Calculate a time, for example, by adding a number of hours to another time
Example: `Next = TIMEVALUE(NOW()) + 1`

Decimal Places: 0 Example: 999

Previous | Next | Cancel

Screenshot of the Salesforce Object Manager interface for the Laptop Bookings object.

The left sidebar shows the "Fields & Relationships" section selected. A formula field named "Laptops Available (Number)" is being edited. The formula is:

```
Laptops Available (Number) = COUNT(Laptops__c WHERE Status__c = 'Delivered')
```

The formula editor includes tabs for "Simple Formula" and "Advanced Formula". A function library on the right lists various mathematical and logical functions like ABS, ACOS, ADDMONTHS, AND, ASCII, ASIN, etc. A "Check Syntax" button is present at the bottom of the formula input area.

Screenshot of the Salesforce Object Manager interface for the Laptop Bookings object, showing the creation of a new custom field.

The left sidebar shows the "Fields & Relationships" section selected. A new custom field is being created with the following details:

- Name:** Laptop Bookings
- Type:** New Custom Field
- Step 5: Add to page layouts**
- Field Label:** Laptops Available
- Data Type:** Formula
- Field Name:** Laptops_Available
- Description:** (empty)

The "Add Field" section contains two checked options: "Page Layout Name" and "Laptop Bookings Layout".

At the bottom, there are buttons for "Previous", "Save & New", "Save", and "Cancel".

Screenshot of the Salesforce Object Manager interface showing the 'Fields & Relationships' section for the 'Laptop Bookings' object.

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

The main content area displays various field types under 'Formula' and 'Fields & Relationships' categories:

- Formula** (under 'Fields & Relationships'):
 - 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 the object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
 - Master-Detail Relationship: Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:
 - The relationship field is required on all detail records.
 - The ownership and sharing of a detail record are determined by the master record.
 - When a user deletes the master record, all detail records are deleted.
 - You can create rollup summary fields on the master record to summarize the detail records.
 - External Lookup Relationship: Creates a relationship that links the object to an external object whose data is stored outside the Salesforce org.
- Fields & Relationships** (under 'Fields & Relationships'):
 - Checkbox: Allows users to select a True (checked) or False (unchecked) value.
 - Currency: Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
 - Date: Allows users to enter a date or pick a date from a pop-up calendar.
 - Date/Time: Allows users to enter a date and time, or pick a date from a pop-up calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
 - Email: Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
 - Geolocation: Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
 - Number: Allows users to enter any number. Leading zeros are removed.
 - Percent: Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.
 - Phone: Allows users to enter any phone number. Automatically formats it as a phone number.
 - Picklist: Allows users to select a value from a list you define.
 - Picklist (Multi-Select): Allows users to select multiple values from a list you define.
 - Text: Allows users to enter any combination of letters and numbers.
 - Text Area: Allows users to enter up to 255 characters on separate lines.
 - Text Area (Long): Allows users to enter up to 131,072 characters on separate lines.

Screenshot of the Salesforce Object Manager interface showing 'Step 2: Enter the details' for creating a new field named 'How many months'.

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

The main content area shows the configuration for the 'How many months' field:

- Field Label:** How many months
- Values:**
 - Use global picklist value set (radio button)
 - Enter values, with each value separated by a new line** (radio button, selected)
- Field Name:** how_many_months
- Description:** (empty text area)
- Help Text:** (empty text area)
- Required:** Always require a value in this field in order to save a record (checkbox checked)
- Auto add to custom report type:** Add this field to existing custom report types that contain this entity (checkbox checked)
- Default Value:** Show Formula Editor (button)

The formula editor shows the following code:

```
Use formula syntax. Enclose text and picker value API names in double quotes. Use _Name_ to include numbers without quotes. You can also use the @Id, @Type, and @RecordId variables to reference the current record. Today() is a function that returns the current date. $CustomMetadataType__r is a reference to a field from a Custom Metadata type record use $CustomMetadataType__r.Id RecordName.Field__c
```

Laptop Bookings
New Custom Field

Step 4 of 4

Field Label: how many months
Data Type: Picklist
Field Name: how_many_months
Description:

Add Field Page Layout Name: Laptop Bookings Layout

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

Step: Creation of Fields & Relationship for Billing Process Object

Billing Process
New Relationship

Step 1 of 6

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

Data Type

- None Selected
- Auto Number
- Formula
- Roll Up Summary
- Lookup Relationship
- Master-Detail Relationship
- External Lookup Relationship

Master-Detail Relationship

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

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 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 and summarize the detail records.

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

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

External Relationship

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

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

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

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

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

Allows users to enter 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.

Step 2 of 6

Select the other object to which this object is related.

Related To: consumer

Screenshot of Step 3: Enter the label and name for the lookup field

Billing Process New Relationship

Step 3. Enter the label and name for the lookup field

Field Label: Name
Field Name: Name
Description:
Help Text:
Child Relationship Name: Billing_Process
Sharing Setting:
 Read Only: Allows users with at least Read access to the Master record to create, edit, or delete related Detail records.
 ReadWrite: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.
Allow reparenting:
 Child records can be reparented to other parent records after they are created
 Auto add to custom report type
Lookup Filter:
Optional, create a filter to limit the records available to users in the lookup field. [Tell me more!](#)

Screenshot of Step 6: Add custom related lists

Billing Process New Relationship

Step 6. Add custom related lists

Field Label: Name
Data Type: Master-Detail
Field Name: Name
Description:
Related List Label: Billing Process
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:
 consumer Layout
 Append related list to users' existing personal customizations

Screenshot of Step 1: Choose the field type

Billing Process

Step 1. Choose the field type

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

Data Type

- None Selected Select one of the data types below.
- Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
- Formula A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
- Roll-Up Summary A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
- Lookup Relationship Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a pop-up list. The other object is the source of the values in the list.
 - The relationship field is required on all detail records.
 - The ownership and sharing of a detail record are determined by the master record.
 - You can create roll-up summary fields on the master record to summarize the detail records.
 - You can create lookup summary fields on the master record to summarize the detail records.
 - The relationship field allows users to click on a lookup icon to select a value from a pop-up list. The master object is the source of the values in the list.
- 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.
 - You can create roll-up summary fields on the master record to summarize the detail records.
 - You can create lookup summary fields on the master record to summarize the detail records.
- External Lookup Relationship Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.
- Checkbox Allows users to select a True (checked) or False (unchecked) value.
- Currency Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
- Date Allows users to enter a date or pick a date from a pop-up calendar.
- Date/Time Allows users to enter a date and time, or pick a date from a pop-up calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
- Email Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
- Geolocation Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.

Billing Process

New Relationship

Step 2. Choose the related object

Select the other object to which this object is related.

Related To

Step 2

Previous Next Cancel

Billing Process

New Relationship

Step 3. Enter the label and name for the lookup field

Step 3 of 6

Field Label

Field Name

Description

Help Text

Child Relationship Name

Required Always require a value in this field in order to save a record
 Clear the value of this field. You can't choose this option if you make this field required.
 Don't allow deletion of the lookup record that's part of a lookup relationship.
 Add this field to existing custom report types that contain this entry

Lookup Filter

Optionally, create a filter to limit the records available to users in the lookup field. [Tell me more!](#)

[Show Filter Settings](#)

Screenshot of the Salesforce Object Manager Fields & Relationships page for the Billing Process object.

The left sidebar shows the following categories:

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

The main content area displays a list of field types:

- Formula
- Roll-Up Summary
- Lookup Relationship
- Master-Detail Relationship
- External Lookup Relationship
- Checkbox
- Currency
- Date
- Date/Time
- Email
- Geolocation
- Number
- Percent
- Phone
- Picklist (selected)
- Picklist (Multi-Select)
- Text
- Text Area
- Text Area (Long)

Each field type has a brief description and usage notes.

Screenshot of the Step 2: Enter the details page for creating a new field.

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

The main form fields are:

- Field Label: Payment Mode
- Values:
 - Use global picklist value set
 - Enter values, with each value separated by a new line
 - Cash
 - Check
 - Credit card
 - Debit card
- Field Name: Payment_Mode
- Description
- Help Text
- Required:
 - Always require a value in this field in order to save a record
 - Add this field to existing custom report types that contain this entity
- Default Value:

Show Formula Editor

Use formula syntax: Enclose text and picker value API names in double quotes: "Text_Value". Include numbers without quotes. If you want to use a formula as an API name, enclose it in single quotes: 'Text_Value'. If you want to reference a field from a Custom Metadata type record use \${CustomMetadataType__r.RecordName.FieldName}

Step 2 of 4

Profile - Stud... | Welcome to S... | Home | Salesf... | Student - Skill... | Billing Process | laptop image... | speed test - G... | +

pvpst-1be-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdM000003FWYw/FieldsAndRelationships/new

Setup Home Object Manager

Search Setup

Billing Process

Step 2. Enter the details

Field Label: [i](#)

Values: Use global picklist value set
 Enter values, with each value separated by a new line

Cash
Check
Credit card
Debit card

Display values alphabetically, not in the order entered
 Use first value as default value
 Restrict picklist to the values defined in the value set [i](#)

Field Name: [i](#)

Description:

Help Text:

Required: Always require a value in this field in order to save a record
 Auto add to custom report type [i](#)
 Add this field to existing custom report types that contain this entity [i](#)

Default Value: [Show Formula Editor](#)

Use formula syntax. Enclose set and global picklist API names in double quotes ("Name"). Include "Name" without quotes if the field name is the same as the API name. Any values enclosed in the expression must be in quotes ("Value"). You can reference a field from a Custom Metadata type record using \$CustomMetadataType__mdt RecordName.FieldName

Step 2 of 4

Previous Next Cancel

Profile - Stud... | Welcome to S... | Home | Salesf... | Student - Skill... | Billing Process | laptop image... | speed test - G... | +

pvpst-1be-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdM000003FWYw/FieldsAndRelationships/new

Setup Home Object Manager

Search Setup

Billing Process

New Custom Field

Step 1. Choose the field type

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 selects the master record, all detail records for that master record are displayed in a list.
- You can use a master-detail relationship to summarize the detail records.

External Lookup Relationship 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.

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

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

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

Help for this Page [i](#)

Step 1

Next Cancel

The screenshot shows the Salesforce Object Manager Fields & Relationships page for the Billing Process object. On the left, a sidebar lists various setup options like Page Layouts, Lightning Record Pages, and Buttons, Links, and Actions. The main area is titled 'Billing Process' and shows a field configuration for a field named 'Amount'. The 'Field Label' is set to 'Amount'. Below it, there's a note about adding the field to custom report types. A large section titled 'Formula Return Type' contains a list of options: None Selected, Checkbox, Currency, Date, Date/Time, Number (which is selected), Percent, Text, and Time. Each option has a brief description and examples. At the bottom of this section is an 'Options' panel with a 'Decimal Places' dropdown set to 2 and an 'Example' field showing '999.00'. Navigation buttons 'Previous', 'Next', and 'Cancel' are at the bottom right.

This screenshot shows the same page as above, but the 'Formula Return Type' section is collapsed. Instead, the main area features a formula editor. It includes a text input field with the placeholder 'Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula subtab to use additional fields, operators, and functions.', an example field with 'Fahrenheit = 1.8 * Celsius_c + 32' and a 'More Examples...' link, and tabs for 'Simple Formula' and 'Advanced Formula'. Below the input field is a 'Description' section with a 'Check Syntax' button and a note about no syntax errors found. To the right, a sidebar titled 'Getting Started Operators & Functions' lists various functions like ABS, ACOS, ADDMONTHS, AND, ASCII, and ASIN, with an 'Insert Selected Function' button. The sidebar also includes a 'All Function Categories' dropdown.

Step: Creating the field in Total Laptops object

Object Manager					
Label	API Name	Type	Description	Last Modified	Deployed
Total Laptops	Total_Laptops__c	Custom Object		18/11/2024	✓

Profile - Student | Welcome to S | Home | Sales | Student - Skill | Total Laptops | laptop image | speed test - G | + | - | X | ↻ | → | C | pvsit-1be-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdM000003FZdF/FieldsAndRelationships/new | Search Setup | ☆ | ☰ | ? | ☰ | 12 | 🐱

Setup | Home | Object Manager

SETUP > OBJECT MANAGER Total Laptops

Details

Fields & Relationships

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules

Step 1. Choose the field type

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

Data Type

None Selected Select one of the data types below.

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

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

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

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

- 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.

Master-Detail Relationship The relationship field allows users to click on a lookup icon to select a value from a pop-up list. The master object is the source of the values in the list.

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

Step 1

Next | Cancel

Object Manager					
Label	API Name	Type	Description	Last Modified	Deployed
Total Laptops	Total_Laptops__c	Custom Object		18/11/2024	✓

Profile - Student | Welcome to S | Home | Sales | Student - Skill | Total Laptops | laptop image | speed test - G | + | - | X | ↻ | → | C | pvsit-1be-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdM000003FZdF/FieldsAndRelationships/new | Search Setup | ☆ | ☰ | ? | ☰ | 12 | 🐱

Setup | Home | Object Manager

SETUP > OBJECT MANAGER Total Laptops

Details

Fields & Relationships

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules
- Scoping Rules
- Object Access

Simple Formula

Laptops Available (Number) = `50 - laptops_delivered__c`

Insert Field | Insert Operator | Functions

ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN

Insert Selected Function

Check Syntax: No syntax errors in merge fields or functions. (Compiled size: 36 characters)

Description

Help Text

VALIDATION RULE:

Step: Creating the validation rule for phone number field in consumer object

The screenshot shows the Salesforce Object Manager interface. At the top, there are several tabs: Profile - Student, Welcome to Sales!, Home | Sales!, Student - Skill, Object Manager (which is active), laptop image, speed test, and a few others. Below the tabs is a navigation bar with icons for Setup, Home, and Object Manager.

The main area displays a table of objects. One row is selected for the 'consumer' object, which is identified as a 'Custom Object'. The 'Last Modified' date is listed as 18/11/2024. To the right of the table, there are 'Edit' and 'Delete' buttons.

At the bottom of the page, there is a section titled 'Validation Rules' with a sub-section '0 Items, Sorted by Rule Name'. A 'New' button is located in the top right corner of this section.

Object Label	Object Name	Type
Change Request	ChangeRequest	Standard Object
Change Request Related Issue	ChangeRequestRelatedIssue	Standard Object
Change Request Related Item	ChangeRequestRelatedItem	Standard Object
Communication Subscription	CommSubscription	Standard Object
Communication Subscription Channel Type	CommSubscriptionChannelType	Standard Object
Communication Subscription Consent	CommSubscriptionConsent	Standard Object
Communication Subscription Timing	CommSubscriptionTiming	Standard Object
consumer	consumer__c	Custom Object
Consumption Rate	ConsumptionRate	Standard Object
Consumption Schedule	ConsumptionSchedule	Standard Object
Contact	Contact	Standard Object
Contact Point Address	ContactPointAddress	Standard Object
Contact Point Consent	ContactPointConsent	Standard Object
Contact Point Email	ContactPointEmail	Standard Object
Contact Point Phone	ContactPointPhone	Standard Object

The screenshot shows the Salesforce Object Manager interface for creating a Validation Rule. The left sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, etc. The main area is titled "consumer Validation Rule".

Validation Rule Edit

- Rule Name:** Phonenumeroremailblankrule
- Active:**
- Description:** 'phone number and email number should not be blank'
- Error Condition Formula:**

```
OR( ISBLANK( phone_number ), ISBLANK( email ) )
```

Example: [Discount_Percent_c>0.30] More Examples...
Display an error if Discount is more than 30%
If this formula expression is true, display the text defined in the Error Message area

Functions: ABS, ACOS, ADDMONTHS, AND, ASCII, ASIN, Insert Selected Function, ABS(number), Returns the absolute value of a number, a number without its sign
- Error Message:**

Example: [Discount percent cannot exceed 30%]
This message will appear when Error Condition formula is true
Error Message: Please fill the phone number and email id

Help on this function

Check Syntax: No errors found

Save | **Save & New** | **Cancel**

PROFILES:

Step: owner Profile

The screenshot shows the Salesforce Setup interface for managing Profiles. The left sidebar has 'Setup' selected under 'Profiles'. The main area is titled 'Profiles' and shows a table of existing profiles. The columns are 'Action', 'Profile Name', 'User License', and 'Custom'. The table includes rows for 'Salesforce API Only System Integrations', 'Silver Partner User', 'Solution Manager', 'Standard Platform User', 'Standard User' (which is selected), and 'System Administrator'. A navigation bar at the bottom indicates '1 of 6' and '0 Selected'.

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit Det...	Salesforce API Only System Integrations	Salesforce Integration	<input checked="" 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"/>

The screenshot shows the 'Clone Profile' dialog. At the top, it says 'You must select an existing profile to clone from.' Below that, there are fields for 'Existing Profile' (set to 'Standard User'), 'User License' (set to 'Salesforce'), and 'Profile Name' (set to 'owner'). At the bottom are 'Save' and 'Cancel' buttons.

You must select an existing profile to clone from.

Existing Profile	Standard User
User License	Salesforce
Profile Name	<input type="text" value="owner"/>

Save Cancel

The screenshot shows the Salesforce Setup - Profiles page. On the left, there's a sidebar with a search bar and sections for Users and Profiles. A message says "Didn't find what you're looking for? Try using Global Search." The main content area is titled "Profiles". It contains several sections:

- Custom Object Permissions:** Shows checkboxes for various objects like Ideas, Images, Incidents, Individuals, Inventory Reservations, Work Plans, etc., under categories like Basic Access, Create, Edit, Delete, View All, and Modify All.
- Session Settings:** Set "Session Times Out After" to "2 hours of inactivity" and "Session Security Level Required at Login" to "None".
- Password Policies:** Set "User passwords expire in" to "90 days", "Enforce password history" to "3 passwords remembered", and "Minimum password length" to "8".

Step: Agent Profile

The screenshot shows the "Clone Profile" dialog box. It asks "You must select an existing profile to clone from." and lists the following details:

- Existing Profile: Standard Platform User
- User License: Salesforce Platform
- Profile Name: Agent

At the bottom are "Save" and "Cancel" buttons.

The screenshot shows the "Profiles" page again, but now for the "Agent" profile. It displays the same sections as the previous screenshot, including:

- Custom Object Permissions:** Similar to the previous screenshot, showing permissions for various objects.
- Session Settings:** Set "Session Times Out After" to "2 hours of inactivity" and "Session Security Level Required at Login" to "None".
- Password Policies:** Set "User passwords expire in" to "90 days", "Enforce password history" to "3 passwords remembered", and "Minimum password length" to "8".

ROLES AND HIERARCHY

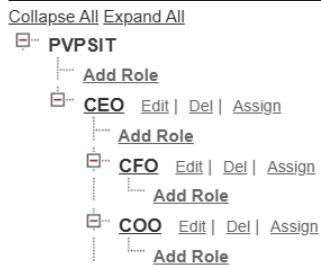
Step: Creating owner Role

The screenshot shows the Salesforce Setup interface for Roles. On the left, a sidebar lists categories like Users, Feature Settings, Sales, Service, and Case Teams. Under Sales, 'Contact Roles' is expanded, showing options for Contracts, Opportunities, and Cases. The main content area is titled 'Understanding Roles' and displays a sample role hierarchy. At the top level is 'Executive Staff' with three roles: 'CEO - President', 'CFO - VP, Sales', and 'VP, Marketing'. Arrows point down to the next level, which includes 'Western Sales Director', 'Eastern Sales Director', and 'International Sales Director'. Arrows point down again to the third level, which includes 'Western Sales Rep', 'Eastern Sales Rep', and 'International Sales Rep'. Each role has a brief description of its permissions. A 'Set Up Roles' button and a 'Don't show this page again' checkbox are at the bottom.

Creating the Role Hierarchy

You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.

Your Organization's Role Hierarchy



Role Edit New Role

The 'Role Edit' form for creating a new role. The 'Label' field contains 'owner'. The 'Role Name' field also contains 'owner'. The 'This role reports to' field is set to 'CEO'. The 'Role Name as displayed on reports' field is empty. At the bottom are 'Save', 'Save & New', and 'Cancel' buttons.

Role Edit New Role

Role Edit

Label	Agent
Role Name	Agent
This role reports to	owner
Role Name as displayed on reports	

Buttons: Save | Save & New | Cancel

USERS:

Step: Create User

The screenshot shows the Salesforce Setup interface for managing users. The left sidebar navigation includes 'Setup' (selected), 'Home', and 'Object Manager'. Under 'Users', there are links for 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', and 'Users' (selected). The main content area is titled 'All Users' and displays a list of existing users with columns for Action, Full Name, Alias, Username, Role, Active status, and Profile. A 'New User' button is at the top right of the user list.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty_00ddm00000fxog5uad_9a5grxt8dyg@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	Pavan Kumar Jammu	jJava	pavan12144@expsit.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	User_Integration	integ	integration@00ddm00000fxbg5uad.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightssecurity@00ddm00000fxbg5uad.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

Screenshot of the Salesforce Setup interface showing the 'New User' creation page.

User Edit

General Information

- First Name: vicky
- Last Name: y
- Alias: vy
- Email: 21501a0567@pvpst.ac.in
- Username: 21501a0567@pvpst.ac.in
- Nickname: User173191779234690851
- Title:
- Company:
- Department:
- Division:

Role: owner

User License: Salesforce

Profile: owner

Active:

Marketing User:

Offline User:

Knowledge User:

Flow User:

Service Cloud User:

Site.com Contributor User:

Site.com Publisher User:

WDC User:

Data.com User Type: --None--

Data.com Monthly Addition Limit: Default Limit (300)

Accessibility Mode (Classic Only):

Screenshot of the Salesforce Setup interface showing the 'User Edit' page for a different user.

User Edit

General Information

- First Name: ram
- Last Name: ram
- Alias: irram
- Email: 21501a0567@pvpst.ac.in
- Username: 21501a0567@pvpst.ac.in
- Nickname: User173191797399822279
- Title:
- Company:
- Department:
- Division:

Role: Agent

User License: Salesforce Platform

Profile: Standard Platform User

Active:

Marketing User:

Offline User:

Knowledge User:

Flow User:

Service Cloud User:

Site.com Contributor User:

Site.com Publisher User:

WDC User:

Data.com User Type: --None--

Data.com Monthly Addition Limit: Default Limit (300)

Accessibility Mode (Classic Only):

High-Contrast Palette on Charts:

FLows:

Step: Create a Flow on dell laptop

Screenshot of the Salesforce Setup interface showing the 'Flows' section.

Flows

Try the Automation Lightning App!

These new features are available only in the Automation Lightning app:

- Search for automations
- Sort your list views with more options
- Organize your automations with categories and subcategories

If you don't see the Ann launcher check that Enable the Automation Lightning App is selected in [Process Automation Settings](#).





Configure Start

X

Select Object

Select the object whose records trigger the flow when they're created, updated, or deleted.

* Object

Laptop Bookings

Configure Trigger

* Trigger the Flow When:

- A record is created
- A record is updated
- A record is created or updated
- A record is deleted



Configure Start

X

Select Object

Select the object whose records trigger the flow when they're created, updated, or deleted.

* Object

Laptop Bookings

Configure Trigger

* Trigger the Flow When:

- A record is created
- A record is updated
- A record is created or updated
- A record is deleted

Decision

* Label * API Name

Description

Outcomes For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.

OUTCOME ORDER	Label	Outcome API Name	Delete Outcome
1 dell	<input type="text" value="dell"/>	<input type="text" value="dell"/>	Delete Outcome
2 acer	<input type="text"/>	<input type="text"/>	
3 hp	<input type="text"/>	<input type="text"/>	
4 mac	<input type="text"/>	<input type="text"/>	
Default Outcome	<input type="text"/>	<input type="text"/>	

Condition Requirements to Execute Outcome

Resource Operator Value

[+ Add Condition](#)

When to Execute Outcome i

If the condition requirements are met
 Only if the record that triggered the flow to run is updated to meet the condition requirements

Decision

* Label * API Name

Description

Outcomes For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.

OUTCOME ORDER	Label	Outcome API Name	Delete Outcome
1 dell core i5	<input type="text" value="dell core i5"/>	<input type="text" value="dell_core_i5"/>	Delete Outcome
2 dell core i3	<input type="text"/>	<input type="text"/>	
3 dell core i5	<input type="text"/>	<input type="text"/>	
4 dell core i7	<input type="text"/>	<input type="text"/>	
Default Outcome	<input type="text"/>	<input type="text"/>	

Condition Requirements to Execute Outcome

Resource Operator Value

[+ Add Condition](#)

When to Execute Outcome i

If the condition requirements are met
 Only if the record that triggered the flow to run is updated to meet the condition requirements

Decision

* Label

* API Name

Description

Outcomes For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.

OUTCOME ORDER	Label	Outcome API Name
	dell core i7	dell_core_i7
1	dell core i3	
2	dell core i5	
3	dell core i7	

Condition Requirements to Execute Outcome

Resource Operator Value

When to Execute Outcome
 If the condition requirements are met
 Only if the record that triggered the flow to run is updated to meet the condition requirements

Decision

* Label

* API Name

Description

Outcomes For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.

OUTCOME ORDER	Label	Outcome API Name	Delete Outcome
1	dell 1(i3)	dell_1_i3	<input type="button" value="Delete Outcome"/>
2	dell 2(i3)		
3	dell 3(i3)		
4	dell 4(i3)		
5	dell 5(i3)		

OUTCOME DETAILS

* Label

* Outcome API Name

Condition Requirements to Execute Outcome

Resource Operator Value

OUTCOME DETAILS

[Delete Outcome](#)

* Label

dell 2(i3)

* Outcome API Name [i](#)

dell_2_i3

Condition Requirements to Execute Outcome

All Conditions Are Met (AND) ▾

Resource

...kings_c > how many months X

Operator

Equals

Value

2

[+ Add Condition](#)

When to Execute Outcome [i](#)

Outcomes For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.

OUTCOME ORDER



dell 1(i3)

dell 2(i3)

dell 3(i3)

dell 4(i3)

dell 5(i3)

Default Outcome

OUTCOME DETAILS

[Delete Outcome](#)

* Label

dell 3(i3)

* Outcome API Name [i](#)

dell_3_i3

Condition Requirements to Execute Outcome

All Conditions Are Met (AND) ▾

Resource

...kings_c > how many months X

Operator

Equals

Value

3

[+ Add Condition](#)

OUTCOME ORDER



dell 1(i3)

dell 2(i3)

dell 3(i3)

dell 4(i3)

dell 5(i3)

Default Outcome

OUTCOME DETAILS

[Delete Outcome](#)

* Label

dell 4(i3)

* Outcome API Name [i](#)

dell_4_i3

Condition Requirements to Execute Outcome

All Conditions Are Met (AND) ▾

Resource

...kings_c > how many months X

Operator

Equals

Value

4

[+ Add Condition](#)

OUTCOMES For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.

OUTCOME ORDER	OUTCOME DETAILS	
dell 1(i3)	* Label dell 5(i3)	* Outcome API Name dell_5_i3
dell 2(i3)		
dell 3(i3)	Condition Requirements to Execute Outcome All Conditions Are Met (AND)	
dell 4(i3)		
dell 5(i3)	Resource ...kings_c > how many months Equals 5 + Add Condition	
Default Outcome		

When to Execute Outcome

Update Records

* Label	* API Name
one month of dell i3 rate	one_month_of_dell_i3_rate

Description

*** How to Find Records to Update and Set Their Values**

- Use the laptop bookings record that triggered the flow
- Update records related to the laptop bookings record that triggered the flow
- Use the IDs and all field values from a record or record collection
- Specify conditions to identify records, and set fields individually

Set Filter Conditions

Condition Requirements to Update Record

None—Always Update Record

Set Field Values for the Laptop Bookings Record

Field	Value
Amount_c	1000



Update Records

X

* Label

two month of dell i3 rate

* API Name 

two_month_of_dell_i3_rate

Description



* How to Find Records to Update and Set Their Values

- Use the laptop bookings record that triggered the flow
- Update records related to the laptop bookings record that triggered the flow
- Use the IDs and all field values from a record or record collection
- Specify conditions to identify records, and set fields individually

Set Filter Conditions

Condition Requirements to Update Record

None—Always Update Record



Set Field Values for the Laptop Bookings Record

Field

Amount_c

Value

2000



 Add Field



Update Records

X

* Label

three month of dell i3 rate

* API Name

three_month_of_dell_i3_rate

Description

* How to Find Records to Update and Set Their Values

- Use the laptop bookings record that triggered the flow
- Update records related to the laptop bookings record that triggered the flow
- Use the IDs and all field values from a record or record collection
- Specify conditions to identify records, and set fields individually

Set Filter Conditions

Condition Requirements to Update Record

None—Always Update Record



Set Field Values for the Laptop Bookings Record

Field

Amount_c

Value

3000



+ Add Field



Update Records

X

* Label

four month of dell i5 rate

* API Name i

four_month_of_dell_i5_rate

Description

T

four month of dell i5 rate

* How to Find Records to Update and Set Their Values

- Use the laptop bookings record that triggered the flow
- Update records related to the laptop bookings record that triggered the flow
- Use the IDs and all field values from a record or record collection
- Specify conditions to identify records, and set fields individually

Set Filter Conditions

Condition Requirements to Update Record

None—Always Update Record



Set Field Values for the Laptop Bookings Record

Field

Amount_c

Value

6000



+ Add Field

 Update Records X

* Label	* API Name (i)
five month of dell i5 rate	five_month_of_dell_i5_rate

Description

*** How to Find Records to Update and Set Their Values**

- Use the laptop bookings record that triggered the flow
 - Update records related to the laptop bookings record that triggered the flow
 - Use the IDs and all field values from a record or record collection
 - Specify conditions to identify records, and set fields individually
-

Set Filter Conditions

Condition Requirements to Update Record

None—Always Update Record ▼

Set Field Values for the Laptop Bookings Record

Field	Value	Remove
Amount_c	7000	✖

+ Add Field

Dell i7

Update Records

* Label

one month of dell i7 rate

* API Name 

one_month_of_dell_i7_rate

Description

* How to Find Records to Update and Set Their Values

- Use the laptop bookings record that triggered the flow
- Update records related to the laptop bookings record that triggered the flow
- Use the IDs and all field values from a record or record collection
- Specify conditions to identify records, and set fields individually

Set Filter Conditions

Condition Requirements to Update Record

None—Always Update Record 

Set Field Values for the Laptop Bookings Record

Field

Amount_c

Value

2000



 Add Field

Update Records

* Label

one month of dell i7 rate

* API Name 

one_month_of_dell_i7_rate

Description

* How to Find Records to Update and Set Their Values

- Use the laptop bookings record that triggered the flow
- Update records related to the laptop bookings record that triggered the flow
- Use the IDs and all field values from a record or record collection
- Specify conditions to identify records, and set fields individually

Set Filter Conditions

Condition Requirements to Update Record

None—Always Update Record 

Set Field Values for the Laptop Bookings Record

Field

Amount_c

Value

2000



 Add Field

 Update Records X

* Label

* API Name i

Description

*** How to Find Records to Update and Set Their Values**

Use the laptop bookings record that triggered the flow

Update records related to the laptop bookings record that triggered the flow

Use the IDs and all field values from a record or record collection

Specify conditions to identify records, and set fields individually

Set Filter Conditions

Condition Requirements to Update Record

Set Field Values for the Laptop Bookings Record

Field	Value	
<input type="text" value="Amount_c"/>	<input type="text" value="6000"/>	←

Update Records

* Label * API Name i

four month of dell i7 rate four_month_of_dell_i7_rate

Description

*** How to Find Records to Update and Set Their Values**

Use the laptop bookings record that triggered the flow
 Update records related to the laptop bookings record that triggered the flow
 Use the IDs and all field values from a record or record collection
 Specify conditions to identify records, and set fields individually

Set Filter Conditions

Condition Requirements to Update Record

None—Always Update Record ▾

Set Field Values for the Laptop Bookings Record

Field	Value	Remove
Amount_c	8000	

+ Add Field

Update Records

*** Label** five month of dell i7 rate *** API Name** five_month_of_dell_i7_rate

Description

*** How to Find Records to Update and Set Their Values**

Use the laptop bookings record that triggered the flow
 Update records related to the laptop bookings record that triggered the flow
 Use the IDs and all field values from a record or record collection
 Specify conditions to identify records, and set fields individually

Set Filter Conditions

Condition Requirements to Update Record

None—Always Update Record ▾

Set Field Values for the Laptop Bookings Record

Field	Value
Amount_c	10000

+ Add Field

APEX:

Edit Bucket Column

* Field: Amount * Bucket Name: types of versions

	Range	Bucket	
<input type="button" value="Add ►"/>	<= * 900	* Bucket Name basic	X
<input type="button" value="Add ►"/>	> 900 to * 1500	* Bucket Name intermediate	X
<input type="button" value="Add ►"/>	> 1,500 to * 10000	* Bucket Name high	X
	> 10,000	* Bucket Name very high	X

Treat empty Amount values in the report as zeros. * = Required

Add Items

Available Items

Favorites

All 1

Q dash

Dashboards X

1 item selected

Dashboards

Enable Field Editing Add Chart

Edit LAPTOP RENTALS App Navigation Items

Personalize your nav bar for this app. Reorder items, and rename or remove items you've added.
[Learn More](#)

1 item added to your list. Save your updates.

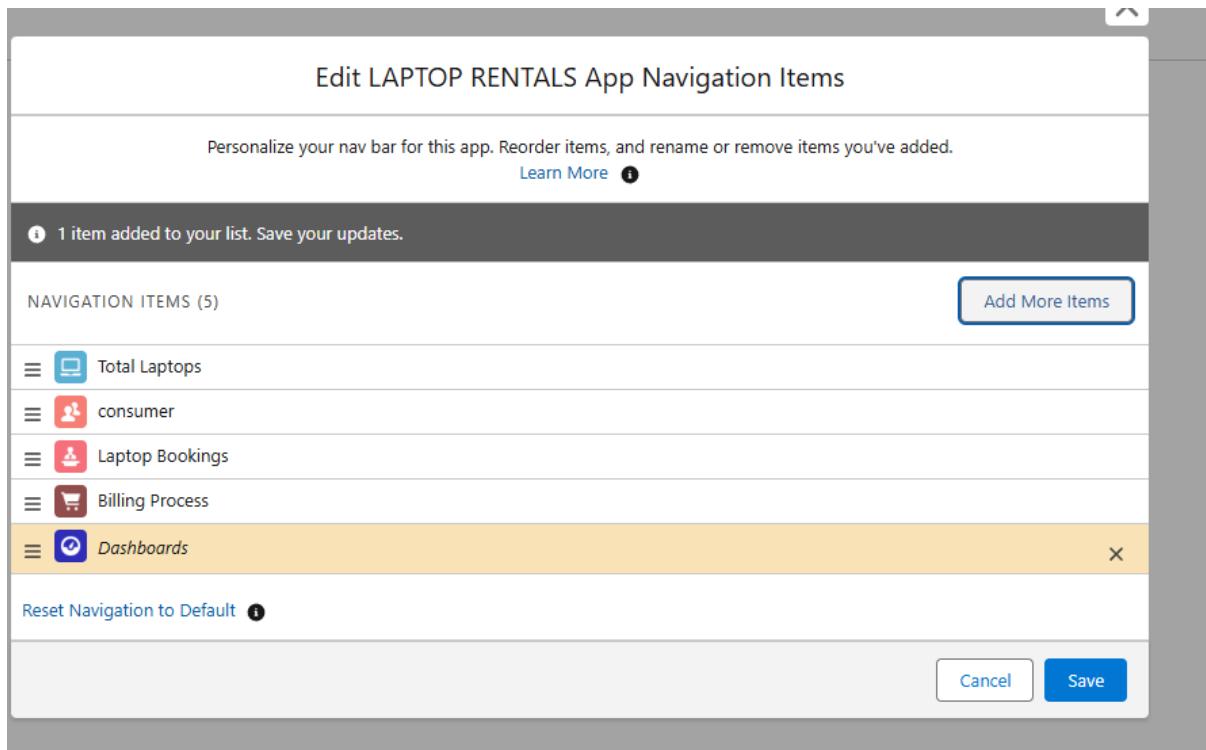
NAVIGATION ITEMS (5)

- Total Laptops
- consumer
- Laptop Bookings
- Billing Process
- Dashboards

Add More Items

Reset Navigation to Default

Cancel Save

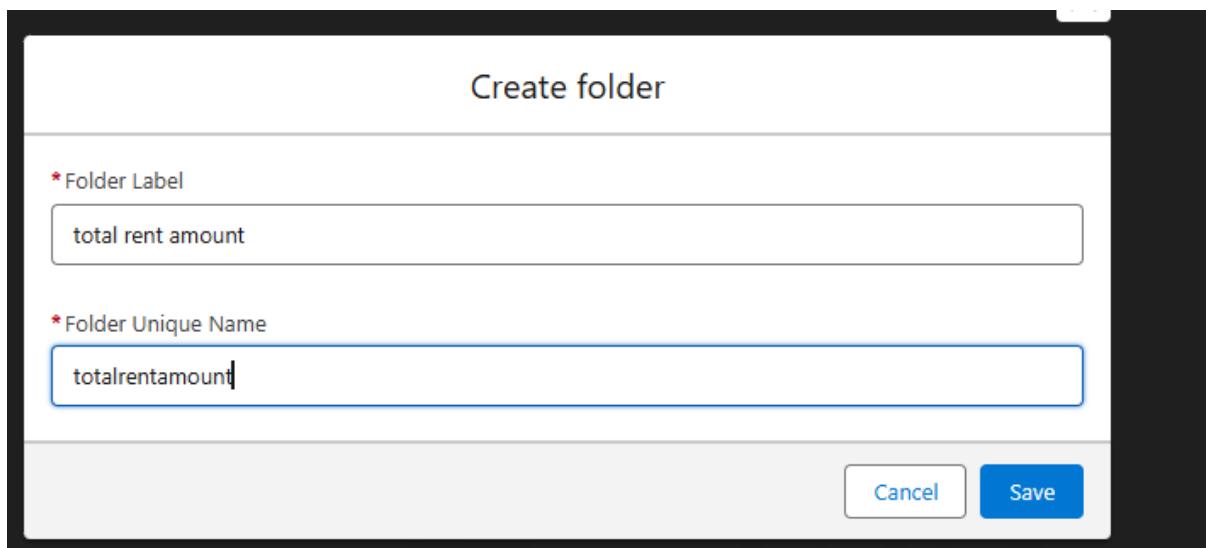


Create folder

* Folder Label

* Folder Unique Name

Cancel Save



New Dashboard

* Name

Description

Folder
 Select Folder

Cancel Create

