SOLVED! "Can't connect to loca | Home | Microsoft 365 | Home | Salesforce | (15) Assignments | Microsoft Te | New Tab

https://pict-9c-dev-ed.develop.lightning.force.com/lightning/setup/SetupOneHome/home

Search Setup

Setup | Home | Object Manager

Quick Find

- Setup Home
- Service Setup Assistant
- Multi-Factor Authentication Assistant
- Release Updates
- Lightning Experience Transition Assistant
- Salesforce Mobile App
- Lightning Usage
- Optimizer

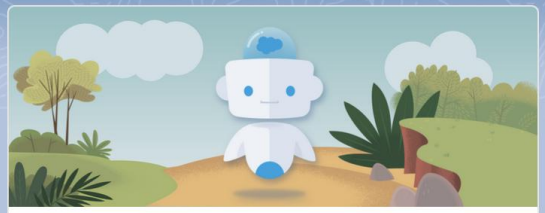
ADMINISTRATION

- Users
- Data
- Email

PLATFORM TOOLS

- Subscription Management
- Apps
- Feature Settings
- Slack
- MuleSoft
- Einstein

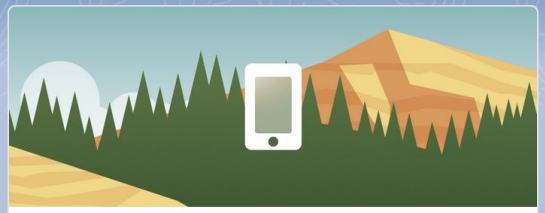
SETUP
Home



Get Started with Einstein Bots

Launch an AI-powered bot to automate your digital connections.

Get Started



Mobile Publisher

Use the Mobile Publisher to create your own branded mobile app.

Learn More

Real-time Collaborative Docs

Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce.

Get Started

Most Recently Used

10 items

NAME	TYPE
user	Custom Object Definition
Sales_App	Custom App
calc	Apex Class

Stay ahead of incidents

Help your teams proactively respond to large-scale disruptions with the free Customer Service Incident Management solution from Service Cloud.

Dismiss | Get Started

Shreyas Vidhate
pict-9c-dev-ed.develop.my.salesforce.com
Settings | Log Out

DISPLAY DENSITY
- ✓ Comfy
- Compact

OPTIONS
- Switch to Salesforce Classic
- Add Username

https://pict-9c-dev-ed.develop.lightning.force.com/ltng/switcher?destination=classic&referrer=/lightning/setup/SetupOneHome/home

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https://pict-9c-dev-ed.develop.my.salesforce.com/setup/forcecomHomepage.apexp?setupid=ForceCom&re

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Search... Search

Switch to Lightning Experience | Shreyas Vidhate | Setup | Help | Sales_App

Home | Contacts | +

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apps

Expand All | Collapse All

Administer

Manage Apps
- Connected Apps
- Connected Apps OAuth Usage
- App Menu

Google Apps
- Google Apps Settings

Build

Create
- Apps

Help for this Page

Getting Started

Dismiss ×

Build App

Generate a basic app with just one step, and then easily extend that app with clicks or code.

Add App

Salesforce Lightning

Turn on the power, speed, and simplicity of the new Salesforce user experience

Get Started

Recent Items beta

Name	Type	Object
calc	Apex Class	
SFDC_DevConsole	Debug Level	
Shreyas Vidhate	User	
user	Custom Object Definition	
Sales_App	Custom App	
Customer	Custom Object Definition	
User	Custom Object Definition	
Users	Custom Tab Definition	User
E_Commerce	Custom App	
DOB_Regulation	Validation Rule	Customer

Quick Links

salesforce appexchange

Recommended Apps Show All

https://pict-9c-dev-ed.develop.my.salesforce.com/02u?retURL=/ui/setup/Setup?setupid=DevTools&setupid=TabSet

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https://pict-9c-dev-ed.develop.my.salesforce.com/02u?retURL=%2Fui%2Fsetup%2FSetup%3Fsetupid%3D

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Salesforce Mobile Quick Start

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Apps

Help for this Page

An *app* is a group of tabs that work as a unit to provide functionality. Users can switch between apps using the app dropdown menu at the top-right corner of every page.

You can customize existing apps to match the way you work, or build new apps by grouping standard and custom tabs.

Custom apps work in conjunction with User Profile Tab Visibility settings. View User Profiles now.

Apps

Quick Start | New | Reorder | Apps Help

New Apps

Action	App Label	Console	Custom	Description
Edit	All Tabs			
Edit	Analytics Studio			Build CRM Analytics dashboards and apps
Edit	App Launcher			App Launcher tabs
Edit	Community			Salesforce CRM Communities
Edit	Content			Salesforce CRM Content
Edit | Del	E_Commerce		✓	
Edit | Del	ISP		✓	
Edit	Marketing			Best-in-class on-demand marketing automation
Edit	Platform			The fundamental Lightning Platform
Edit	Sales			The world's most popular sales force automation (SFA) solution
Edit | Del	Sales_App		✓	
Edit	Salesforce Chatter			The Salesforce Chatter social network, including profiles and feeds
Edit	Sample Console	✓		(Salesforce Classic) Lets agents work with multiple records on one screen
Edit	Service			Manage customer service with accounts, contacts, cases, and more

SOLVED! "Can't connect to loca | Home | Microsoft 365 | New Custom App ~ Salesforce | (15) Assignments | Microsoft Te | New Tab

https://pict-9c-dev-ed.develop.my.salesforce.com/ui/setup/tab/TabSetWizard?retURL=%2F02u%3FretURL

Search... Search

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New Custom App

Help for this Page

Step 1. Select Type — **Step 1 of 5**

Select the type of app to create.

- (•) Custom app
- ( ) Console

Next | Cancel

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New Custom App

Help for this Page

Step 2. Enter the Details — Step 2 of 5

Fill in the fields below to define the custom app.

Custom App Information — = Required Information

App Label: New_Sales_App

App Name: New_Sales_App

Description:

Previous | Next | Cancel

Next

SOLVED! "Can't connect to loca | Home | Microsoft 365 | New Custom App ~ Salesforce | (15) Assignments | Microsoft Te | New Tab

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New Custom App

Help for this Page

Step 3. Choose the Image Source for the Custom App Logo — Step 3 of 5

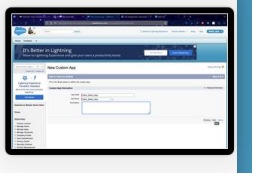
Optionally, specify a logo for this custom app. To do so, choose an image file from the document library.

The file size of a custom app logo must be smaller than 20 KB. (For comparison, the salesforce.com logo is about 3 KB). To upload an image file, add a new document to the Documents tab. Image dimensions should be a maximum of 300 pixels wide by 55 pixels high for best results. Larger images will be resized and may appear distorted.

Insert an Image

Previous | Next | Cancel

Next



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Home Contacts +

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- Translation Workbench
- Data Management
- Mobile Administration

New Custom App

Help for this Page

Step 4. Choose the Tabs

Step 4 of 5

Choose the tabs to include in this custom app.

Available Tabs

Campaigns
Card Payment Methods
Cases
Chatter
Groups
Communication Subscriptions
Communication Subscription C
Communication Subscription C
Communication Subscription T
Consumption Schedules
Contact Point Consent
Contact Point Type Consent
Contact Requests
Content

Add
Remove

Selected Tabs

Home
Contacts

Up
Down

Default Landing Tab Home

Previous | Next | Cancel

Next

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https://pict-9c-dev-ed.develop.my.salesforce.com/ui/setup/tab/TabSetWizard

- Picklist Value Sets
- Packages
- Report Types
- Tabs
- Service Cloud Launch Pad
- Action Link Templates
- **Global Actions**
- **Workflow & Approvals**

- **Develop**
- **Lightning Bolt**
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- Lightning App Builder
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- Automated Process Actions
- Case Escalations
- Entitlement Processes
- API Usage Notifications
- Mass Emails
- Email Snapshots
- **Jobs**
- **Logs**

Minimum Access - Salesforce		
Partner App Subscription User	☑	☑
Partner Community Login User	☑	☑
Partner Community User	☑	☑
Read Only	☑	☑
Salesforce API Only System Integrations	☑	☑
Silver Partner User	☑	☑
Solution Manager	☑	☑
Standard Platform User	☑	☑
Standard User	☑	☑
System Administrator	☑	☑

Previous | Save | Cancel

Save

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- Search Layouts
- Record Types
- Limits
- Buttons, Links, and Actions

Object State Transition

- Fields
- Related Lookup Filters
- Validation Rules
- Triggers
- Page Layouts
- Field Sets
- Compact Layouts
- Search Layouts
- Record Types
- Limits
- Buttons, Links, and Actions

Object State Value

- Fields
- Related Lookup Filters
- Validation Rules
- Triggers
- Page Layouts
- Field Sets
- Compact Layouts
- Search Layouts
- Record Types
- Limits
- Buttons, Links, and Actions

Create

- Objects
- Big Objects

Develop

- External Objects

New custom object | Reset users' passwords | Enable Chatter feeds

Security

- New profile
- New permission set
- Add roles

Data

- Import accounts & contacts
- Import custom objects
- Mass delete records

Extract valuable insights from conversational data and improve your customer journey,...

Community

Dismiss ×

Resources

Collaborate & Discuss
Join the conversation.

User Groups
Connect with customers in your area.

Find Answers

Post your questions to the Community.

Ask a Question

Contribute Ideas

Share & vote for ideas to improve the product.

Post an Idea

Release Resources

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https://pict-9c-dev-ed.develop.my.salesforce.com/p/setup/custent/CustomObjectsPage?retURL=/ui/setup/Setup?setupid=DevTools&setupid=CustomObjects

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https://pict-9c-dev-ed.develop.my.salesforce.com/p/setup/custent/CustomObjectsPage?retURL=%2Fui%2F

Search... Search

Switch to Lightning Experience | Shreyas Vidhate | Setup | Help | New_Sales_App

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Custom Objects

Help for this Page

Custom objects are database tables that allow you to store data specific to your organization in Salesforce. You can use custom objects to extend Salesforce functionality or to build new application functionality.

Once you have created a custom object, you can create a custom tab, custom related lists, reports, and dashboards for users to interact with the custom object data. You can also access custom object data through the API.

New Custom Object | Schema Builder

Action	Label	Master Object	New Custom Object	Deployed	Description
Edit | Del	Customer			✓	
Edit | Del	User			✓	
Edit | Del	user			✓	

SOLVED! "Can't connect to loca | Home | Microsoft 365 | New Custom Object ~ Salesforc | (15) Assignments | Microsoft Te | New Tab

https://pict-9c-dev-ed.develop.my.salesforce.com/01I/e?setupid=CustomObjects&retURL=%2Fp%2Fsetup%

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- Data Management
- Mobile Administration
- Desktop Administration
- Outlook Integration and Sync
- Gmail Integration and Sync
- Email Administration
- Google Apps
- Analytics
- Data.com Administration

Build

- Customize
- Create

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

Custom Object Definition Edit

Save | Save & New | Cancel

Custom Object Information

= Required Information

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

Label: Object — Example: Account

Plural Label: Objects — Example: Accounts

Starts with vowel sound: ☑

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

Object Name: Object — Example: Account

Description:

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: Object Name — Example: Account Name

Data Type: Auto Number

Display Format: O-{000} — Example: A-{0000} What Is This?

Starting Number:

Optional Features

- ☐ Allow Reports
- ☐ Allow Activities
- ☐ Track Field History
- ☐ Allow in Chatter Groups

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- Email Administration
- Google Apps
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- Data.com Administration

Build

- Customize
- Create
  - Apps
  - Custom Labels
  - Interaction Log Layouts
  - Objects
  - Big Objects
  - Picklist Value Sets
  - Packages
  - Report Types
  - Tabs

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

Object Name Object **Example: Account**

Description

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 Object Name **Example: Account Name**

Data Type Auto Number

Display Format O-{000} **Example: A-{0000}** What Is This?

Starting Number 1

1

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.

- [x] Allow Sharing
- [x] Allow Bulk API Access
- [x] Allow Streaming API Access

Deployment Status

- ( ) In Development
- (●) Deployed

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https://pict-9c-dev-ed.develop.my.salesforce.com/01I5i000002VlxW?setupid=CustomObjects

Search... Search

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Home | Contacts | +

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tabs

Expand All | Collapse All

Build

- Customize
  - Tab Names and Labels
    - Rename Tabs and Labels
- Create
  - Tabs

Custom Object

Object

Help for this Page

Standard Fields [4] | Custom Fields & Relationships [0] | Validation Rules [0] | Page Layouts [1] | Field Sets [0] | Compact Layouts [1] | Buttons, Links, and Actions [8] | Record Types [0] | Apex Sharing Reasons [0] | Apex Sharing Recalculation [0] | Object Limits [10]

Custom Object Definition Detail

Edit | Delete

Singular Label	Object	Description	
Plural Label	Objects	Enable Reports	☐
Object Name	Object	Track Activities	☐
API Name	Object__c	Allow in Chatter Groups	☐
		Allow Sharing	✓
		Allow Bulk API Access	✓
		Allow Streaming API Access	✓
		Track Field History	☐
		Enable Licensing	☐
		Deployment Status	Deployed
		Allow Search	☐
		Help Settings	Standard salesforce.com Help Window
Created By	Shreyas Vidhate, 10/05/2023, 10:54 pm	Modified By	Shreyas Vidhate, 10/05/2023, 10:54 pm

Standard Fields

Standard Fields Help

Action	Field Label	Field Name	Data Type	Controlling Field	Indexed
	Created By	CreatedBy	Lookup(User)		
	Last Modified By	LastModifiedBy	Lookup(User)		
			Auto Number		✓

https://pict-9c-dev-ed.develop.my.salesforce.com/setup/ui/customtabs.jsp?setupid=CustomTabs&retURL=/ui/setup/Setup?setupid=DevTools

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New Custom Object Tab

Help for this Page

Step 1. Enter the Details — **Step 1 of 3**

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

Select an existing custom object or create a new custom object now.

Object Object

Tab Style CRT TV

(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

SOLVED! "Can't connect to loca | Home | Microsoft 365 | New Custom Object Tab ~ Sales | (15) Assignments | Microsoft Te | New Tab

https://pict-9c-dev-ed.develop.my.salesforce.com/setup/ui/objectCustomTabWizard.jsp

- Customize
- Create
  - Apps
  - Custom Labels
  - Interaction Log Layouts
  - Objects
  - Big Objects
  - Picklist Value Sets
  - Packages
  - Report Types
  - Tabs
  - Service Cloud Launch Pad
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- Entitlement Processes

Gold Partner User	Default On
High Volume Customer Portal	Default On
High Volume Customer Portal User	Default On
Identity User	Default On
Marketing User	Default On
Minimum Access - Salesforce	Default On
Partner App Subscription User	Default On
Partner Community Login User	Default On
Partner Community User	Default On
Read Only	Default On
Salesforce API Only System Integrations	Default On
Silver Partner User	Default On
Solution Manager	Default On
Standard Platform User	Default On
Standard User	Default On
System Administrator	Default On

Previous Next Cancel

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https://pict-9c-dev-ed.develop.my.salesforce.com/setup/ui/objectCustomTabWizard.jsp

- Gmail Integration and Sync
- Email Administration
- Google Apps
- Analytics
- Data.com Administration

Build

- Customize
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Deploy

- Deployment Settings
- Deployment Status

Monitor

- System Overview

Data Manager (standard__DataManager)	☑
Subscription Management (standard__RevenueCloudConsole)	☑
Salesforce Scheduler Setup (standard__LightningScheduler)	☑
Bolt Solutions (standard__LightningBolt)	☑
ISP (ISP)	☑
E_Commerce (E_Commerce)	☑
Sales_App (Sales_App)	☑
New_Sales_App (New_Sales_App)	☑

☑ Append tab to users' existing personal customizations

Previous | Save | Cancel

Save

SOLVED! "Can't connect to loca | Home | Microsoft 365 | Objects: Home ~ Salesforce - D | (15) Assignments | Microsoft Te | New Tab

https://pict-9c-dev-ed.develop.my.salesforce.com/a03/o

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Search... Search

Switch to Lightning Experience | Shreyas Vidhate | Setup | Help | New_Sales_App

Home | Contacts | Objects | +

Create New...

Recent Items

- Shreyas Vidhate
- C-0003
- C-0001
- C-0002

Recycle Bin

Objects
Home

Help for this Page

View: All Go! Edit | Create New View

Recent Objects

New

Recently Viewed

No recent records. Click Go or select a view from the dropdown to display records.

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Create New...

Recent Items

- Shreyas Vidhate
- C-0003
- C-0001
- C-0002

Recycle Bin

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Help for this Page

View: All Go! Edit | Create New View

Recent Objects

New

No recent records. Click Go or select a view from the dropdown to display records.

force.com

View Fields + New

View and manage the fields for this object

View Record Types

View Validation Rules

View Approvals

Edit App

Edit Tab

Edit Columns

Import Data

Turn off menu

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https://pict-9c-dev-ed.develop.my.salesforce.com/01I5i000002VlxW?setupid=CustomObjects#01I5i000002VlxW_CustomFieldRelatedList_target

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Build

- Customize
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- Develop
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  - Canvas App Previewer
  - Installed Packages
  - Package Usage

Action	Field Label	Field Name	Data Type	Controlling Field	Indexed
	Created By	CreatedBy	Lookup(User)		
	Last Modified By	LastModifiedBy	Lookup(User)		
Edit	Object Name	Name	Auto Number		✓
Edit	Owner	Owner	Lookup(User,Group)		✓

Custom Fields & Relationships

New | Field Dependencies | Custom Fields & Relationships Help

New Custom Fields & Relationships

No custom fields defined

Related Lookup Filters

No related lookup filters defined.

Validation Rules

New | Validation Rules Help

No validation rules defined.

Triggers

New | Triggers Help

No triggers defined

Page Layouts

New | Page Layout Assignment | Page Layouts Help

Action	Page Layout Name	Created By	Modified By
Edit | Del	Object Layout	Shreyas Vidhate, 10/05/2023, 10:54 pm	Shreyas Vidhate, 10/05/2023, 10:54 pm

Field Sets

New | Field Sets Help

No field sets defined.

Compact Layouts

New | Compact Layout Assignment | Compact Layouts Help

Action	Label	API Name	Primary	Modified By
	System Default	SYSTEM	✓	

Search Layouts

Search Layouts Help

Action	Layout	Columns Displayed	Buttons Displayed	Modified By
Edit	Search Results	Object Name		Shreyas Vidhate, 10/05/2023, 10:54 pm
Edit	Lookup Dialogs	Object Name	N/A	Shreyas Vidhate, 10/05/2023, 10:54 pm

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  - AppExchange Marketplace

Deploy

- Deployment Settings
- Deployment Status

Monitor

- System Overview

	Date/Time field.
Email	Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
Geolocation	Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
Number	Allows users to enter any number. Leading zeros are removed.
Percent	Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.
Phone	Allows users to enter any phone number. Automatically formats it as a phone number.
Picklist	Allows users to select a value from a list you define.
Picklist (Multi-Select)	Allows users to select multiple values from a list you define.
Text	Allows users to enter any combination of letters and numbers.
Text Area	Allows users to enter up to 255 characters on separate lines.
Text Area (Long)	Allows users to enter up to 131,072 characters on separate lines.
Text Area (Rich)	Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.
Text (Encrypted)	Allows users to enter any combination of letters and numbers and store them in encrypted form.
Time	Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:50.600" are all valid times for this field.
URL	Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

Next Cancel

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Build

New Custom Field

Step 2. Enter the details

Step 2 of 4

Previous Next Cancel

Field Label: Name

Please enter the maximum length for a text field below.

Length: 15

Field Name: Name

Description:

Help Text:

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

Unique: ☐ Do not allow duplicate values

- ◉ Treat "ABC" and "abc" as duplicate values (case insensitive)
- ○ Treat "ABC" and "abc" as different values (case sensitive)

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_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.RecordAPIName.Field__c

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None Selected	Select one of the data types below.
Auto Number	A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
Formula	A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
Roll-Up Summary	A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
Lookup Relationship	Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
Master-Detail Relationship	Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where: • The relationship field is required on all detail records. • The ownership and sharing of a detail record are determined by the master record. • When a user deletes the master record, all detail records are deleted. • You can create rollup summary fields on the master record to summarize the detail records. The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.
External Lookup Relationship	Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.
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.
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Object

New Custom Field

Help for this Page

Step 2. Enter the details

Step 2 of 4

Previous | Next | Cancel

Field Label: Email_Id

Field Name: Email_Id

Description:

Help Text:

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

Unique: ☑ Do not allow duplicate values

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

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

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.RecordAPIName.Field__c

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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.
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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 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.
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Object

New Custom Field

Help for this Page

Step 2. Enter the details

Step 2 of 4

Previous Next Cancel

Field Label: DOB

Field Name: DOB

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_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.RecordAPIName.Field__c

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Object

New Custom Field

Help for this Page

Step 1. Choose the field type

Step 1

Next | Cancel

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

Data Type

None Selected	Select one of the data types below.
Auto Number	A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
Formula	A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
Roll-Up Summary	A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
Lookup Relationship	Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
Master-Detail Relationship	Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where: • The relationship field is required on all detail records. • The ownership and sharing of a detail record are determined by the master record. • When a user deletes the master record, all detail records are deleted. • You can create rollup summary fields on the master record to summarize the detail records. The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.
External Lookup Relationship	Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

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Object

New Custom Field

Help for this Page

Step 2. Choose output type

Step 2 of 5

Previous | Next | Cancel

Field Label: Age

Field Name: Age

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

Formula Return Type

○ None Selected	Select one of the data types below.
○ Checkbox	Calculate a boolean value Example: TODAY() > CloseDate
○ Currency	Calculate a dollar or other currency amount and automatically format the field as a currency amount. Example: Gross Margin = Amount - Cost__c
○ Date	Calculate a date, for example, by adding or subtracting days to other dates. Example: Reminder Date = CloseDate - 7
○ Date/Time	Calculate a date/time, for example, by adding a number of hours or days to another date/time. Example: Next = NOW() + 1
◉ Number	Calculate a numeric value. Example: Fahrenheit = 1.8 * Celsius__c + 32
○ Percent	Calculate a percent and automatically add the percent sign to the number. Example: Discount = (Amount - Discounted_Amount__c) / Amount
○ Text	Create a text string, for example, by concatenating other text fields. Example: Full Name = LastName & ", " & FirstName
○ Time	Calculate a time, for example, by adding a number of hours to another time. Example: Next = TIMEVALUE(NOW()) + 1
Options	Decimal Places 2 Example: 999.00

Previous | Next | Cancel

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Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula subtab to use additional fields, operators, and functions.

Example: Fahrenheit = 1.8 * Celsius__c + 32 More Examples...

Quick Tips

- Getting Started
- Operators & Functions

Simple Formula | Advanced Formula

Insert Field | Insert Operator

Age (Number) =

```
( TODAY()  -  DOB__c )/365
```

Functions

-- All Function Categories

ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN

Insert Selected Function

Check Syntax No syntax errors in merge fields or functions. (Compiled size: 39 characters)

Description

Help Text

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Master-Detail Relationship	Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where: • The relationship field is required on all detail records. • The ownership and sharing of a detail record are determined by the master record. • When a user deletes the master record, all detail records are deleted. • You can create rollup summary fields on the master record to summarize the detail records. The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.
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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 (Encrypted)	Allows users to enter any combination of letters and numbers and store them in encrypted form.
Time	Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:50.600" are all valid times for this field.
URL	Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

Next Cancel

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Get Started

Salesforce Mobile Quick Start

Home

Administer

- Release Updates
- Manage Users
- Manage Apps
- Manage Territories
- Company Profile
- Data Classification
- Privacy Center
- Security Controls
- Domain Management

Object

New Custom Field

Help for this Page

Step 2. Enter the details — Step 2 of 4

Previous | Next | Cancel

Field Label: Gender

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

Male
Female
Other

- ☐ Display values alphabetically, not in the order entered
- ☐ Use first value as default value
- ☑ Restrict picklist to the values defined in the value set

Field Name: Gender

Description:

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Create New...

Recent Items

- Shreyas Vidhate
- C-0003
- C-0001
- C-0002

Recycle Bin

Objects
Home

Help for this Page

View: All Go! Edit | Create New View

Recent Objects

New

No recent records. Click Go or select a view from the dropdown to display records.

force.com

- View Fields
- View Object
- View Record Types
- View Validation Rules + New

View and manage validation rules for this object

- Edit App
- Edit Tab
- Edit Columns
- Import Data

Turn off menu

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Expand All | Collapse All

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- Gmail Integration and Sync
- Email Administration
- Google Apps
- Analytics
- Data.com Administration

Build

- Customize

Define a validation rule by specifying an error condition and a corresponding error message. The error condition is written as a Boolean formula expression that returns true or false. When the formula expression returns true, the save will be aborted and the error message will be displayed. The user can correct the error and try again.

Validation Rule Edit

Save | Save & New | Cancel

Rule Name: DOB_Check

Active: ☑

Description:

Quick Tips
- Operators & Functions

Error Condition Formula

= Required Information

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

Insert Field | Insert Operator

```
YEAR( DOB__c ) > 2020
```

Check Syntax

Functions

-- All Function Categories

UNIXTIMESTAMP
UPPER
VALUE
VLOOKUP
WEEKDAY
YEAR

Insert Selected Function

YEAR(date)

Returns the year of a date, a number between 1900 and 9999

Help on this function

Error Message

Example: Discount percent cannot exceed 30%

This message will appear when Error Condition formula is **true**

Error Message: Invalid DOB

This error message can either appear at the top of the page or below a specific field on the page

Error Location: ◉ Top of Page ○ Field

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- Outlook Integration and Sync
- Gmail Integration and Sync
- Email Administration
- Google Apps
- Analytics
- Data.com Administration

Build

- Customize
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  - Custom Labels
  - Interaction Log Layouts
  - Objects
  - Big Objects
  - Picklist Value Sets
  - Packages
  - Report Types
  - Tabs
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  - Action Link Templates
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- Develop
- Lightning Bolt
- Schema Builder
- Lightning App Builder
- Canvas App Previewer
- Installed Packages
- Package Usage
- AppExchange Marketplace

Deploy

- Deployment Settings
- Deployment Status

Monitor

Example: Discount percent cannot exceed 30%

This message will appear when Error Condition formula is **true**

Error Message Invalid DOB

This error message can either appear at the top of the page or below a specific field on the page

Error Location ○ Top of Page ◉ Field DOB

Save | Save & New | Cancel

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Object Validation Rule

Back to Object

Help for this Page

Validation Rule Detail

Edit | Clone

Rule Name	DOB_Check	Active	✓
Error Condition Formula	YEAR(DOB__c) > 2020		
Error Message	Invalid DOB	Error Location	DOB
Description			
Created By	Shreyas Vidhate, 10/05/2023, 11:16 pm	Modified By	Shreyas Vidhate, 10/05/2023, 11:16 pm

Edit | Clone

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Create New...

Recent Items

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- Shreyas Vidhate
- C-0003
- C-0001
- C-0002

Recycle Bin

Object
O-001

« Back to List: Custom Object Definitions

Edit Layout | Printable View | Help for this Page

Object Detail

Edit | Delete | Clone | Sharing

Object Name	O-001	Owner	Shreyas Vidhate [Change]
Name	Shreyas		
Email_Id	example@test.com		
DOB	31/03/2020		
Age	3		
Gender	Male		
Created By	Shreyas Vidhate, 10/05/2023, 11:19 pm	Last Modified By	Shreyas Vidhate, 10/05/2023, 11:19 pm

Edit | Delete | Clone | Sharing

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Create New...

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Recycle Bin

Object Edit

New Object

Help for this Page

Object Edit

Save | Save & New | Cancel

Error: Invalid Data.
Review all error messages below to correct your data.

Information

= Required Information

Name	Example	Owner	Shreyas Vidhate
Email_Id	acv@gh.com		
DOB	12/05/2023 [10/05/2023] Error: Invalid DOB		
Gender	Female		

Save | Save & New | Cancel

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