

0. Search Setup

B D ?

12

Setup

Home

Object Manager v

SETUP> OBJECT MANAGER

Appointment

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

Details

Description

API Name

Appointment\_ c

Custom

v

Singular Label

Appointment

Plural Label

Appointments

Enable Reports

v

Track Activities

Track Field History

v

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help

Window

Edit

Delete

Service records

Details	Details	<a>Edit</a> <a>Delete</a>
Fields & Relationships	Description	
Page Layouts	API Name	Enable Reports
Lightning Record Pages	Service_records_c	<input checked="" type="checkbox"/>
Buttons, Links, and Actions	Custom	Track Activities
Compact Layouts	<input checked="" type="checkbox"/>	
Field Sets	Singular Label	Track Field History
Object Limits	Service records	<input checked="" type="checkbox"/>
Record Types	Plural Label	Deployment Status
Related Lookup Filters	Service records	Deployed
Search Layouts		Help Settings
		Standard salesforce.com Help Window

Q. Search Setup

Billing details and feedback

Details	Details	<a>Edit</a> <a>Delete</a>
Fields & Relationships	Description	
Page Layouts	API Name	Enable Reports
Lightning Record Pages	Billing_details_and_feedback_c	<input checked="" type="checkbox"/>
Buttons, Links, and Actions	Custom	Track Activities
Compact Layouts	<input checked="" type="checkbox"/>	
Field Sets	Singular Label	Track Field History
Object Limits	Billing details and feedback	<input checked="" type="checkbox"/>
Record Types	Plural Label	Deployment Status
Related Lookup Filters	Billing details and feedback	Deployed
Search Layouts		Help Settings
List View Button Layout		Standard salesforce.com Help Window



a\_tabs

User Interface

Rename Tabs and Labels

Tabs

Didn't find what you're looking for?  
Try using [Global Search](#).



## New Custom Object Tab

### Step 1. Enter the Details

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 ob](#)

Object Appointment

Tab Style-

(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

J.. tabs

User Interiace

Rename Tabs and labels

Tabs

dn't find what you're looking for?  
/ using Global Search.

# SETUP Tabs

## Step 3. Add to Custom Apps

Step 3 of 3

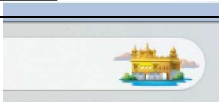
Choose the custom apps for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each Custom App.

Custom App	<input type="checkbox"/> Include Tab
Platform (standard_Platform)	<input type="checkbox"/>
Sales (standard_Sales)	<input checked="" type="checkbox"/>
Service (standard_Service)	<input checked="" type="checkbox"/>
Marketing CRM Classic (standard_Markeling)	<input checked="" type="checkbox"/>
Sample Console (standard_ServiceConsole)	<input type="checkbox"/>
High Volume Customer Portal User	<input checked="" type="checkbox"/>
Authenticated Website User	<input checked="" type="checkbox"/>
App Launcher (standard_Applauncher)	<input checked="" type="checkbox"/>
Community (standard!_Community)	<input type="checkbox"/>
Site.com (standard_Sites}	<input checked="" type="checkbox"/>
Salesforce Chatter (standard_ Chatter)	<input checked="" type="checkbox"/>

867°F  
Mostly clear



Q Search



() Search Setup



!!! Setup Home Object Manager v

O.. tabs

v UserIntrriace

Rename Tabs and Labels

Tabs

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

## SETUP grabs

### Custom Tabs

[Help for this Page](#)

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

#### Custom Object Tabs

[Edit/ Del](#)

A

Tab Style



Desc. is Off

[Edit/ Del](#) [Billing: Initial Issue/Overseas](#)

[Edit/ Del](#)



#### Web Tabs

#### Visualforce Tabs

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Setup

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Object Manager

Cl. app

Salesforce Mobile App

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Mass Transfer Approval Requests

Apps

App Manager

AppExchange Marketplace

Connected Apps

Connected Apps OAuth Usage

Manage Connected Apps

External Client Apps

External Client App Manager

OAuth Usage

Settings

SETUP

Lightning Experience App Manager

24 items • Sorted by App Name • Filtered by All app menu items - TabSet Type, App Type

App Name	Developer Name	Description
All Tabs	AllTabSet	
Analytics Studio	Insights	Build CRM Analytics dashboards and apps
App Launcher	Applauncher	App Launcher tabs
Automation	FlowsApp	Automate business processes and repetitive tasks.
Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.
Business Rules Engine	ExpressionSetConsole	Create and maintain business rules that perform complex lookups and c
Community	Community	Salesforce CRM Communities
Content	Content	Salesforce CRM Content
Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.
10 Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.
11 Garage Management	Garage_Management	
12 Lightning Experience	LightningExperience	View Adoption and Usage Metrics for Lightning Experience
13 Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.

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Lightning Bolt

II SETUP

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11 Garage Management	Garage_Management	
12 Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience
13 Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.

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SalesforceMobileApp

Mass Transfer Approval Requests

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App Manager

AppExchangeMarketplace

ConnectedApps

ConnectedAppsOAuth Usage

ManageConnectedApps

InternalClientApps

External Client App Manager

OAuth Usage

Settings

Lightning Bolt

Flow Category

SETUP

Lightning Experience App Manager

New Lightning App

New Connected App

24Items•SortedbyAppName•filteredbyAllappmenutems

TabSetTypeAppType

App Name t	Developer Name	Description	Modified..	Ap...	T.1..
All Tabs	AllTabSet		06/01/2025,8:09pm	Classic	G
Analytics Studio	Insights	BuildCRMAnalyticsdashboardsandapps	06/01/2025,8:09pm	Classic	V G
App Launcher	AppLauncher	App Launcher tabs	06/01/2025,8:09pm	Classic	V G
Automation	FlowsApp	Automatebusiness processes and repetitive tasks.	06/01/2025,8:15pm	Lightning	V G
Bot Solutions	LightningBolt	Discover and manage business solutionsdesignedforyourindustry.	06/01/2025,8:11pm	Lightning	V G
BusinessRuff'sEngine	ExpressionSetConsole	Createandmaintainbusinessrulesthatperformcomplexlookupsandcalculations.	06/01/2025,8:09pm	Lightning	V G
Community	Community	Salesforce CRM Communities	06/01/2025,8:09pm	Classic	V G
Content	SalesforceCRMContent	SalesforceCRMContent	06/01/2025,8:09pm	Classic	V G
Digital Experiences	Digital Experiences	UseDigital Experiences to view limits, monitor usage, and manage recipes.	06/01/2025,8:09pm	Lightning	V G
Digital Experiences	SalesforceCMS	Manage content and metadataforallsites.	06/01/2025,8:09pm	Lightning	V G
Garage Management	Garage_Management		06/01/2025,10:02pm	Lightning	V G
Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	06/01/2025,8:09pm	Lightning	V G
Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	06/01/2025,8:09pm	Classic	V G

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Setup Home Object Manager V

Object Manager

2 terms, Sorted by Label

Customer

Customer Details

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED
Customer	Customer	Standard Object		
Customer Details	Customer_Details_c	Custom Object		06/01/2025



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Setup

Home

Object Manager v

SETUP> OBJECT MANAGER

## Customer Details

Details

**Fields & Relationships**

Page Layouts

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Buttons, Links, and Actions

Compact Layouts

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0 Geolocation

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

0 Number

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

0 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.

0 Picklist

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

Q Picklist (Multi-Select)

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

0Text

Allows users to enter any combination of letters and numbers.

0 Text Area

Allows users to enter up to 255 characters on separate lines.

0 Text Area (Long)

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

0 Text Area (Rich)

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

0 Text (Encrypted).....

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

0Time

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.

0 URL

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



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## Customer Details

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Field Label Phone number J.

Field Name Phone number

Description

Help Text

Required ☐ Always require a value in this field in order to save a record  
Auto add to custom report type **13** Add this field to existing custom report types that contain this entity

Default Value Show formula Editor

Use formula syntax: Enclose text and list value API names in double quotes ("the\_f1 : (25), show percentages as decimals: (U.10), and express date calculations in the standard, reference a field from a Custom Metadata type record using: SCustomMetadata\_Type\_\_mc

[Previous](#) [Next](#) [Cancel](#)



SETUP> OBJECT MANAGER

## Customer Details

## 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

## New Custom Field

### Step 4. Add to page layouts

Step 4 of 4

Previous Save & New Save Cancel

Field Label	Phone number
-------------	--------------

Data Type	Phone
-----------	-------

Field Name Phone\_number

### 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.

**!!J** Add Field Page Layout Name

Customer Details Layout

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

[Previous](#) [Save&](#) [Save](#) [Cancel](#)

SETUP> OBJECT MANAGER

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[ 0. Quick Find

11 New Deleted Fields Field Dependenc

FIELD LABEL

FIELD NAME

DATA TYPE

CONTRO LUNG

Created By

Created ById

Lookup(User)

Customer Details Name

Name

Text(80)

Last Modified By

LastModifiedById

Lookup(User)

Owner

Ow11erId

Lookup(User,Group)

Phone number

Phone\_number\_c

Phone

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Restriction Rules

Scoping Rules

Customer Details

New Relationship

Step 3 Enter the label and name for the lookup field

Customer Details

Customer Details

Description

HelpTut

Child Relationship Name

Customer Details

Auto add to custom report type

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.

Show Filter Settings

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Fields & Relationships

61 items, Sorted by Field Label

Fields & Relationships

Page Layouts

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Compact layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Field O\_c\_ick\_F\_in\_d\_

New

Deleted Fields

Field Dependencies

Self History Tool

Created By	CreatedBy	Lookup(User)
Customer Details	Customer_Details_c	Lookup(CustomerDetails)
Customer Details Name		Text(80)
Last Modified By	LastModifiedBy	Lookup(User)
	OwnerId	Lookup(User,Group)
Phone number	Phone_number_c	Phone

Flow Builder

Free-Form

Run

Debug

Save As New Version

Save

Toolbox

S.mentl Manager

New Flow

Select how you'd like to start building your automation.

Start From Scratch

Select type, automation type and start building on an empty canvas.

Use a Template

Select a pre-built flow and customize it to fit your needs.

Flow Builder

Save

Toolbox

a menu Manager

Select Type

Recommended

Screen Flow

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

Schedule-Triggered Flow

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

Autolaunched Flow (No Trigger)

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

All Flow Types

Autolaunched Flow (No Trigger)

Record-Triggered Flow

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

Platform Event-Triggered Flow

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

Record-Triggered Orchestration

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

Autolaunched Orchestration (No Trigger)

Flow Builder

Useful Elements

Auto Layout

Run | Debug | View Tests | Save As New Version | Save | Activate

Start  
Record-Triggered Flow

Object: Billing details and feedback  
Trigger: A record is created or updated  
Optimize for: Actions and Related Records  
+ Add Scheduled Path(s) (Optional)  
[?] Open Flow Trigger Explorer for Billing details...

Configure Start

A record is created or updated

A record is updated

A record is created or updated

A record is deleted

Set Entry Conditions

Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the Only when a record is updated to meet the condition requirements option for When to Run the Flow for Updated Records.

Condition Requirements

\*Optimize the flow for:

Fast Field Updates

Update fields on the record that triggers the flow to run. This high-performance flow runs before the record is saved to the database.

Actions and Related Records

Update a record and perform actions, like send an email. This more flexible flow runs after the record is saved to the database.

Include a Run Asynchronously path to access an external system after the original transaction for the triggering record is successfully committed

Toolbox

Manager

Q Search this flow.

New Resource

Text Template (1)

Alert

Update Records (1)

Amount Update

Update Records

How to find records to update: 1. Set their values 2. Use the billing details, not feedback record that triggered the flow 3. Update records related to the billing details and feedback record that triggered the flow 4. Use the ID and all field values from a record or record collection 5. Specify location to identify records and fields individually

Set Filter Conditions

Condition Requirements to Update Records

All Conditions Set (AND)

Open

Set Field Values for the Billing details and feedback Record

Garage Management | Customer Details | Appointments | Billing details and feedback | Service records

Customer Details

Recently Viewed

0 items - Updated a few seconds ago

Customer Details Name