

LAB EVALUATION 1

Divija 102018056 CSBS – 3

Object 1

The screenshot shows the Salesforce Setup interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager'. A search bar is also present. Below the navigation bar, the 'Object Manager' section is active, showing 'New Custom Object'. A message states: 'Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more!](#) [Don't show this message again](#)'. The 'Custom Object Definition Edit' section has buttons for 'Save', 'Save & New', and 'Cancel'. Under 'Custom Object Information', there are fields for 'Label' (Obj56), 'Plural Label' (obj56s), 'Starts with vowel sound' (checkbox), 'Object Name' (Obj56), and 'Description' (First description of the object). A red circle with a '1' is next to the description field. At the bottom, there are links for 'Context-Sensitive Help Setting' and 'Open the standard Salesforce.com Help & Training window'.

The screenshot shows the Salesforce Setup interface for the 'Obj56' custom object. The left sidebar lists various setup options: 'Details', 'Fields & Relationships', 'Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', 'Compact Layouts', 'Field Sets', 'Object Limits', 'Record Types', 'Related Lookup Filters', 'Triggers', and 'Flow Triggers'. The 'Details' section is selected, showing the 'Description' (First description of the object), 'API Name' (Obj56_c), 'Custom' checkbox, 'Singular Label' (Obj56), 'Plural Label' (obj56s), 'Enable Reports', 'Track Activities', 'Track Field History', 'Deployment Status' (Deployed), 'Help Settings', and 'Standard salesforce.com Help Window'.

Making custom field

The screenshot shows the Salesforce Setup interface for creating a new custom field. The left sidebar lists various setup options: 'Details', 'Fields & Relationships', 'Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', 'Compact Layouts', 'Field Sets', 'Object Limits', 'Record Types', 'Related Lookup Filters', 'Triggers', and 'Flow Triggers'. The 'Fields & Relationships' section is selected, showing 'New Custom Field'. The 'Step 2. Enter the details' section has buttons for 'Previous', 'Next', and 'Cancel'. There are fields for 'Field Label' (First name), 'Length' (50), 'Field Name' (First_name), 'Description' (Enter your name), and 'Help Text'. A red circle with a '1' is next to the description field. At the bottom, there are checkboxes for 'Required' and 'Unique', and a note: 'Treat "ABC" and "abc" as duplicate values (case insensitive)'.

Obj56

Obj56

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Triggers

Flow Triggers

Validation Rules

Obj56

New Custom Field

Help for this Page

Step 4. Add to page layouts

Previous

Save & New

Save

Cancel

Field Label	First name
Data Type	Text
Description	Enter your name

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

☒ Obj56 Layout

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

Previous

Save & New

Save

Cancel

Obj56

Obj56

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Triggers

Flow Triggers

Validation Rules

Obj56

New Custom Field

Help for this Page

Step 2. Enter the details

Previous

Next

Cancel

Field Label	number
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Please enter the length of the number and the number of decimal places. For example, a number with a length of 8 and 2 decimal places can accept values up to "12345678.90".

Length

18

Decimal Places

0

Number of digits to the left of the decimal point

Number of digits to the right of the decimal point

Field Name	number
Description	
Help Text	

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

Obj56

Obj56

Details

Fields & Relationships

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Related Lookup Filters

Triggers

Flow Triggers

Validation Rules

Obj56

New Custom Field

Help for this Page

Step 3. Establish field-level security

Previous

Next

Cancel

Field Label	last name
Data Type	Text
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	<input checked="" type="checkbox"/> Visible	<input type="checkbox"/> Read-Only
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
CPQ Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
End User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Executive Sponsor	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Identity User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Marketing User	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Obj56

Obj56

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Triggers

Flow Triggers

Validation Rules

Fields & Relationships

7 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
First name	First_name__c	Text(50)		
Last Modified By	LastModifiedBy	Lookup(User)		
last name	last_name__c	Text(50)		
number	number__c	Number(18, 0)		
Obj56 Name	Name	Text(80)		✓
Owner	OwnerId	Lookup(User,Group)		✓

Creating Tab:

The screenshot shows the Salesforce Setup interface. On the left is a navigation menu with categories like Setup Home, ADMINISTRATION, and PLATFORM TOOLS. The main content area is titled 'SETUP Tabs' and shows 'Step 1. Enter the Details' for creating a new custom tab. It includes a dropdown for 'Object' (set to 'Obj56'), a 'Tab Style' selector (set to 'Umbrella'), an optional 'Splash Page Custom Link' (set to '--None--'), and a text area for 'Description'. 'Next' and 'Cancel' buttons are at the bottom right.

This screenshot shows the 'Custom Tabs' page in Salesforce. It provides an overview of how custom tabs can be used to extend functionality. Below the text, there are three sections: 'Custom Object Tabs' with a table of existing tabs, 'Web Tabs' (currently empty), and 'Visualforce Tabs' (currently empty). Each section has a 'New' button and a 'What Is This?' link.

Action	Label	Tab Style	Description
Edit Del	Accounts	Bank	
Edit Del	Candidates	People	Candidate details
Edit Del	obj56s	Umbrella	

The screenshot shows a 'New Obj56' record creation dialog box. It has a title bar 'New Obj56' and a close button. The 'Information' section contains four fields: 'Obj56 Name' (value: 'hello'), 'First name' (value: 'Lab'), 'number' (value: '12,345,678'), and 'last name' (value: 'Evaluation'). The 'Owner' field shows 'Divija Arora'. At the bottom are 'Cancel', 'Save & New', and 'Save' buttons.

Get StartedCheck Out Top Features

Leave FeedbackDays left in trial

Search...

Obj56 "hello" was created.

SalesHomeLeadsAccountsContactsOpportunitiesDashboardsCalendarAccountsobj56s

Obj56hello

New ContactEditNew

RelatedDetails

Obj56 Namehello

First nameLab

number12,345,678

last nameEvaluation

Created ByDivija Arora, 2/21/2023, 10:17 PM

OwnerDivija Arora

Last Modified ByDivija Arora, 2/21/2023, 10:17 PM

OBJECT 2

SETUPObject Manager

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

SaveSave & NewCancel

Custom Object Information

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

Labeltest56Example: Account

Plural Labeltest56sExample: Accounts

Starts with vowel sound☐

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

Object Name: test56Example: Account

Description: Second Object for Lab evaluation

Context-Sensitive Help Setting

☒ Open the standard Salesforce.com Help & Training window

☐ Open a window using a Visualforce page

SETUP > OBJECT MANAGERtest56

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Triggers

Flow Triggers

Validation Rules

Details

DescriptionSecond Object for Lab evaluation

API Name: test56__cCustom

Singular Label: test56

Plural Label: test56s

Enable Reports

Track Activities

Track Field History

Deployment Status: Deployed

Help Settings: Standard salesforce.com Help Window

Edit

Making custom field

test56

test56

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Triggers

Flow Triggers

Validation Rules

New Custom Field

Step 2 of 4

Step 2. Enter the details

Field Label: number

Field Name: number

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

test56

test56

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Triggers

Flow Triggers

Validation Rules

New Custom Field

Step 3 of 4

Step 3. Establish field-level security

Field Label: number

Data Type: Phone

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	<input checked="" type="checkbox"/> Visible	<input type="checkbox"/> Read-Only
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
CPQ Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
End User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Executive Sponsor	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Identity User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Marketing User	<input checked="" type="checkbox"/>	<input type="checkbox"/>

test56

test56

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Triggers

Flow Triggers

Validation Rules

New Custom Field

Step 2 of 4

Step 2. Enter the details

Field Label: First name

Length: 50

Field Name: First_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)

SETUP > OBJECT MANAGER

test56

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Triggers

Flow Triggers

Fields & Relationships

6 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
First name	First_name__c	Text(50)		
Last Modified By	LastModifiedById	Lookup(User)		
number	number__c	Phone		
Owner	OwnerId	Lookup(User,Group)		✓
test56 Name	Name	Text(80)		✓

Creating Tab:

Search Setup

Setup

Home

Object Manager

Quick Find

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Release Updates

Salesforce Mobile App

Lightning Usage

Optimizer

Manage Subscription

ADMINISTRATION

Users

Data

Email

PLATFORM TOOLS

Apps

Feature Settings

Einstein

SETUP

Tabs

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

test56

Tab Style

Fan

(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

Search Setup

Setup

Home

Object Manager

Quick Find

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Release Updates

Salesforce Mobile App

Lightning Usage

Optimizer

Manage Subscription

ADMINISTRATION

Users

Data

Email

PLATFORM TOOLS

Apps

Feature Settings

SETUP

Tabs

Custom Tabs

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

New

What Is This?

Action	Label	Tab Style	Description
Edit Del	Accounts	Bank	
Edit Del	Candidates	People	Candidate details
Edit Del	obj56a	Unbranded	
Edit Del	test56a	Fan	

Web Tabs

New

What Is This?

No Web Tabs have been defined

Visualforce Tabs

New

What Is This?

Get StartedCheck Out Top Features

Leave FeedbackDays left in trial9Subscribe Now

Search...

SalesHomeLeadsAccountsContactsOpportunitiesQuotesCampaignsForecastsReportsDashboardsCalendarAccounts

test56Recently Viewed0 items • Updated a few seconds ago

test56 Name

New test56

Information

test56 NameJpmc

number8437484298

First nameDivija

OwnerDivija Arora

CancelSave & NewSave

NewImportChange Owner

To Do ListPhoneNotes

Get StartedCheck Out Top Features

Leave FeedbackDays left in trial9Subscribe Now

Search...

SalesHomeLeadsAccountsContactsOpportunitiesQuotesCampaignsForecastsReportsDashboardsCalendarAccounts

test56Jpmc

New ContactEdit

test56 Jpmc was created.

RelatedDetails

test56 NameJpmc

number(843) 748-4298

First nameDivija

Created ByDivija Arora • 2/21/2023, 10:19 PM

OwnerDivija Arora

Last Modified ByDivija Arora • 2/21/2023, 10:19 PM