

LAB- 4 ASSIGNMENT

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Search Setup

Setup Home Object Manager

Object Manager

New Custom Object

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

Custom Object Definition Edit

Save Save & New Cancel

Custom Object Information

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

Label

Account

Example: Account

Plural Label

Accounts

Example: Accounts

Starts with vowel sound

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

Object Name

Account

Example: Account

Description

new object account is created for assignment purpose

Context-Sensitive Help Setting

Open the standard Salesforce.com Help & Training window

Object Manager

46 Items. Sorted by Label

Label	API Name	Type	Description	Last Modified	Deployed
Account	Account__c	Custom Object	new object account is created for assignment purpose.	2/8/2023	✓

Setup

Tabs

New Custom Tab

Step 1. Enter the Details

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

Account

Tab Style

Blank

(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

Account

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

☐ External Lookup Relationship

☐ Checkbox

☐ Currency

☐ Date

☐ Date/Time

☐ Email

☐ Geolocation

☒ Number

☐ Percent

☐ Phone

☐ Picklist

☐ Picklist (Multi-Select)

☐ Text

☐ Text Area

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list. Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

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

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

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

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.

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 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 255 characters on separate lines.

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

Account

New Custom Field

Help for this Page

Step 2. Enter the details

Step 2 of 4

PreviousNextCancel

Field Label

number

Field Name

account number

Description

Help Text

Required

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

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

Decimal Places

Number of digits to the left of the decimal point

Number of digits to the right of the decimal point

Account

Step 3. Establish field-level security

Step 3 of 4

PreviousNextCancel

Field Label

number

Data Type

Number

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
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"/>
Minimum Access - Salesforce	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Read Only	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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

NewWhat Is This?

Action	Label	Tab Style	Description
Edit Del	Accounts	Blank	

Web Tabs

NewWhat Is This?

Account

New Custom Field

Help for this Page

Step 4. Add to page layouts

Step 4 of 4

Previous

Save & New

Save

Cancel

Field Label	number
Data Type	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.

☒ Add Field

Page Layout Name

☒

Account Layout

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

Previous

Save & New

Save

Cancel

New Account

Information

* Account Name

Owner

Divija Arora

number

Cancel

Save & New

Save

Account

12345

Related

Details

Account Name

12345

Owner

Divija Arora

number

Created By

Divija Arora

, 2/9/2023, 5:33 AM

Last Modified By

Divija Arora

, 2/9/2023, 5:33 AM