

The screenshot shows a web browser window with multiple tabs open. The active tab is 'Developer Edition Signup' at developer.salesforce.com/signup. The page has a dark blue header with the text 'Sign up for your Salesforce Developer Edition' and 'A Salesforce Platform environment for free.' Below the header, there is a form for entering personal information. The form fields include:

- First Name*: Jammu
- Last Name*: Pavan Kumar
- Email*: 21501a0567@pvsit.ac.in
- Role*: Developer
- Company*: PVPSIT
- Country/Region*: India
- State/Province*: Andhra Pradesh
- Postal Code*: 520007
- Username*: pavan1214@company.com

Below the form, there is a note about username requirements and a checked checkbox for agreeing to the Main Services Agreement and Salesforce Program Agreement.

Sign up for your Salesforce Developer Edition

A Salesforce Platform environment for free.

Complete the form to get access to the Salesforce Developer Edition.

First Name*

Jammu

Last Name*

Pavan Kumar

Email*

21501a0567@pvpsit.ac.in

Role*

Developer



Company*

PVPSIT

Country/Region*

India



State/Province*

Andhra Pradesh



Postal Code*

520007

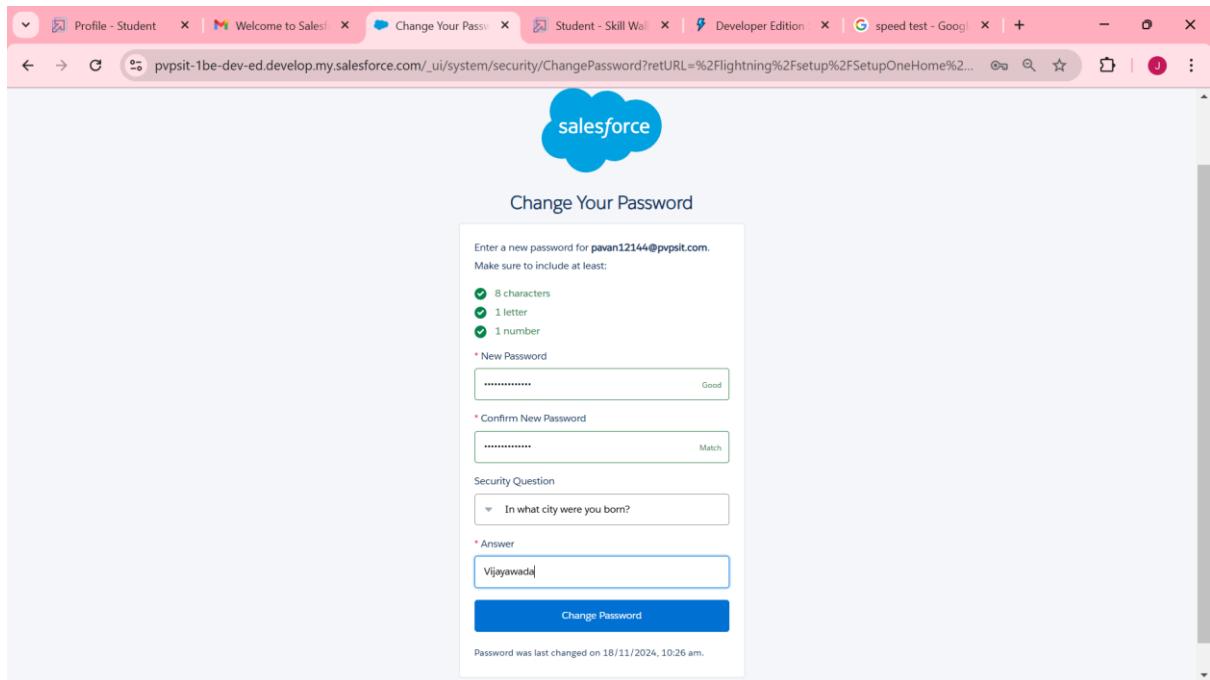
Username*

pavan1214@company.com

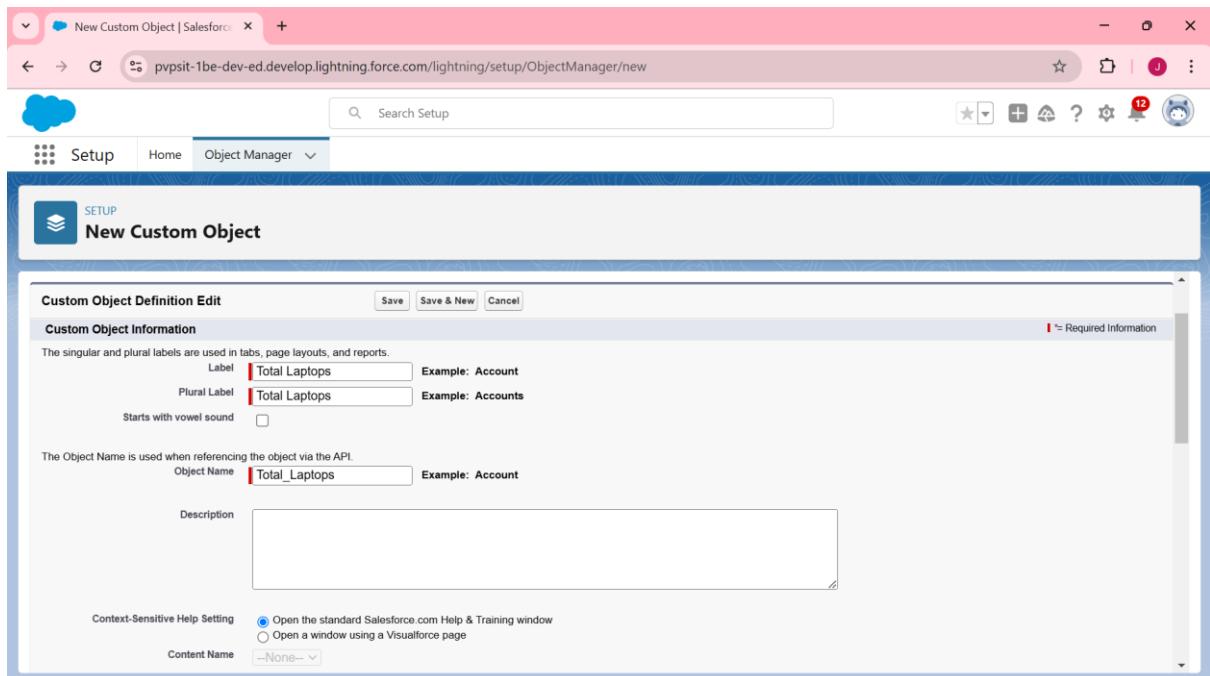
Your username must be in the form of an email address (it does not have to be real). It must be unique and cannot be associated with another Salesforce login credential. [Read more about username recommendations.](#)



I agree to the [Main Services Agreement – Developer Services](#) and [Salesforce Program Agreement](#).



Password : salesforce@123



The screenshot shows the Salesforce Setup interface for creating a new custom object. The top navigation bar includes tabs for Setup, Home, and Object Manager. The main title is "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: Example: Account Name

Data Type: 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?](#)

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

Buttons: Save, Save & New, Cancel

Consumer object

New Custom Object | Salesforce

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

SETUP

New Custom Object

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: consumer Example: Account

Plural Label: consumer Example: Accounts

Starts with vowel sound

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

Object Name: consumer Example: Account

Description:

New Custom Object | Salesforce

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

SETUP

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: 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.

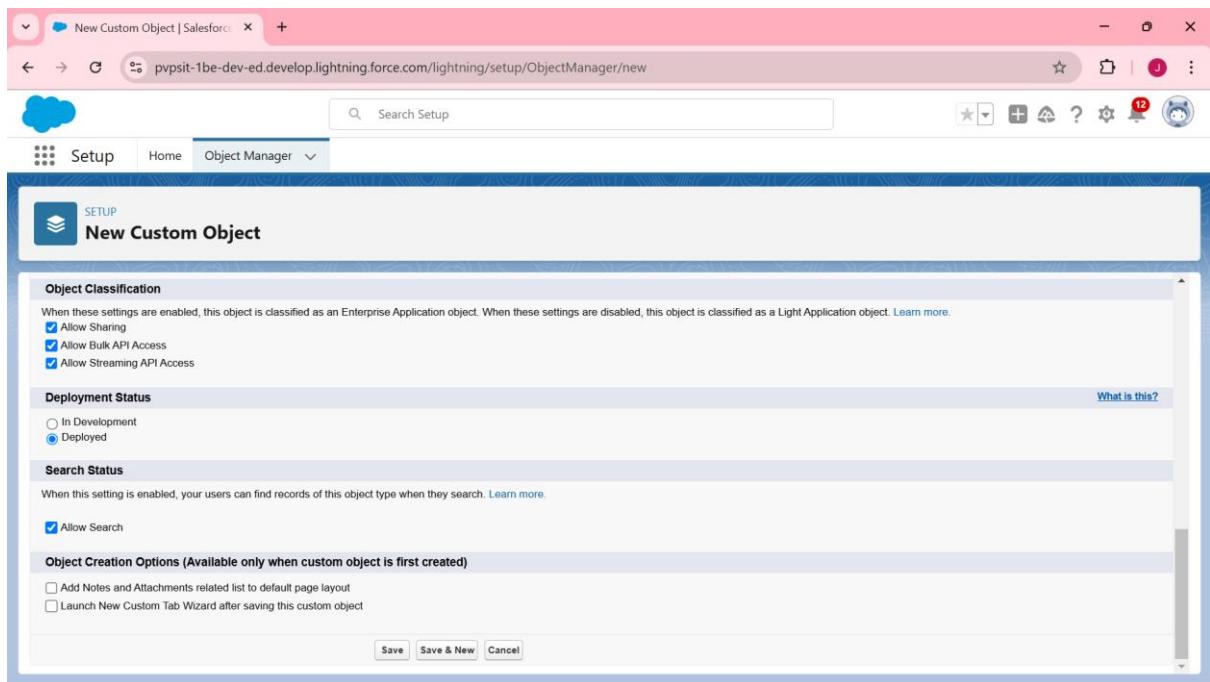
Optional Features

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](#).

Allow Sharing



Laptop bookings object

New Custom Object | Salesforce

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

SETUP

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	<input type="checkbox"/>		

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

Object Name	Laptop_Bookings	Example:	Account
-------------	-----------------	----------	---------

Description

Context-Sensitive Help Setting

- Open the standard Salesforce.com Help & Training window
- Open a window using a Visualforce page

Content Name

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

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

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

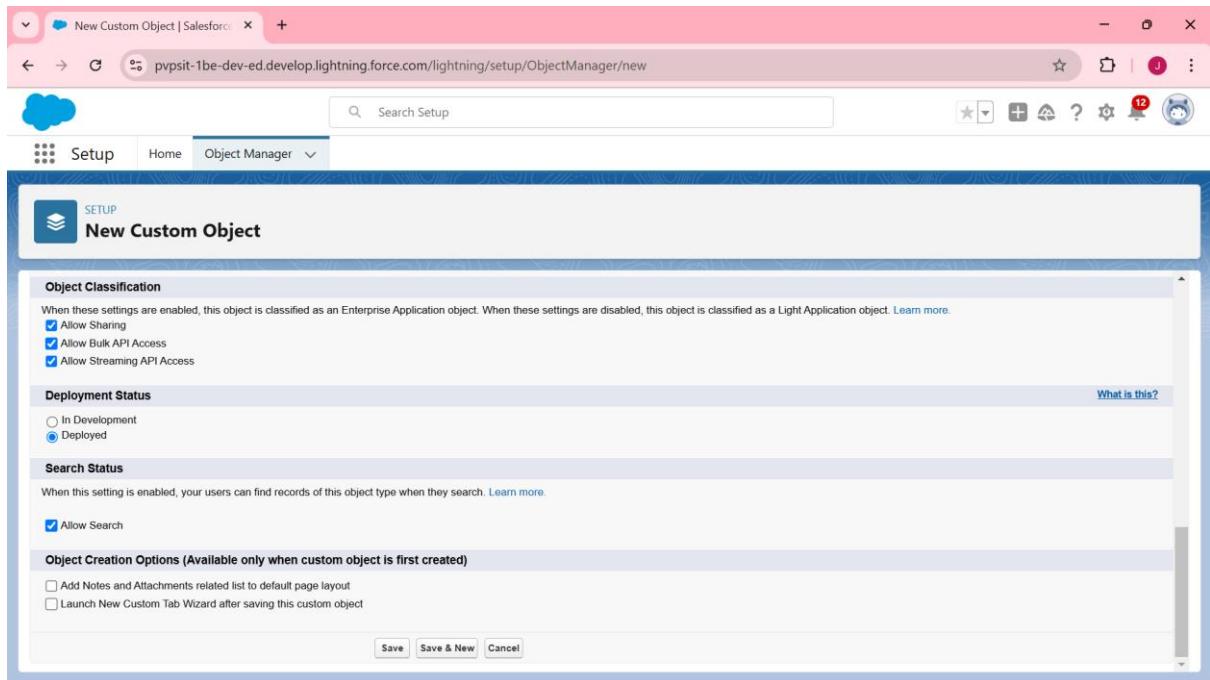
When this setting is enabled, your users can find records of this object type when they search. [Learn more.](#)

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



Billing Process

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.

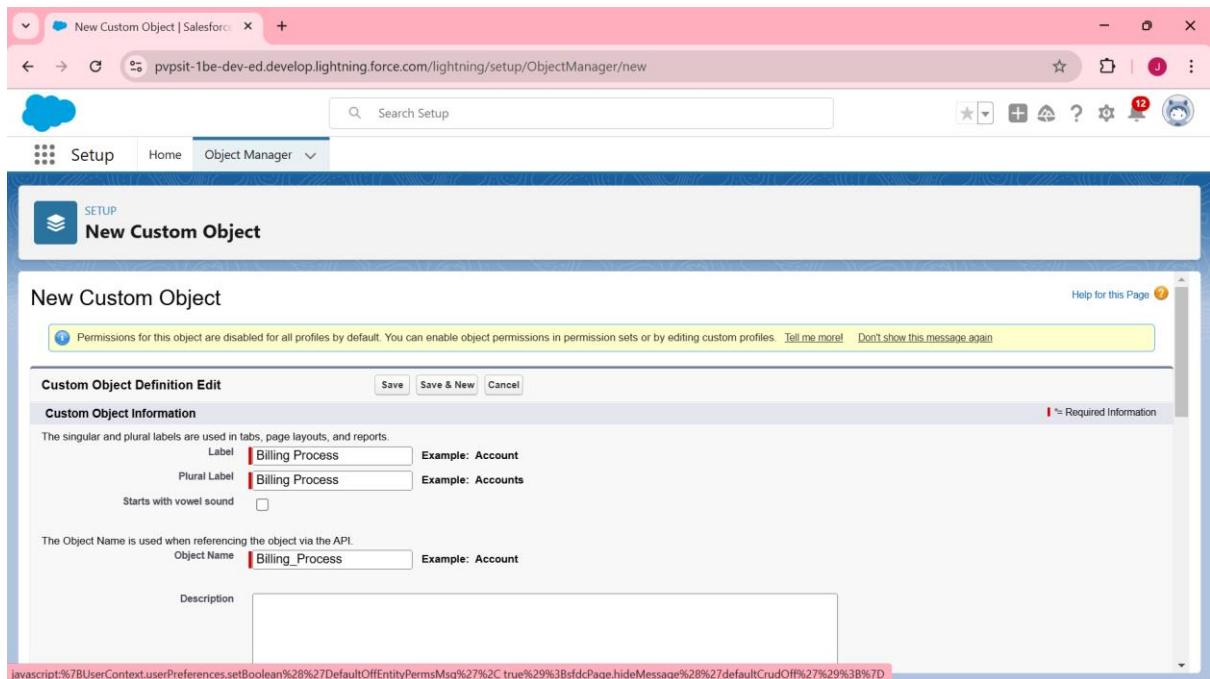
Label Example: Account
Plural Label Example: Accounts
Starts with vowel sound

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

Object Name Example: Account

Description

javascript:%7BUserContext.userPreferences.setBoolean%28%27DefaultOffEntityPermsMsg%27%2C true%29%3BsfdcPage.hideMessage%28%27defaultCrudOff%27%29%3B%7D



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

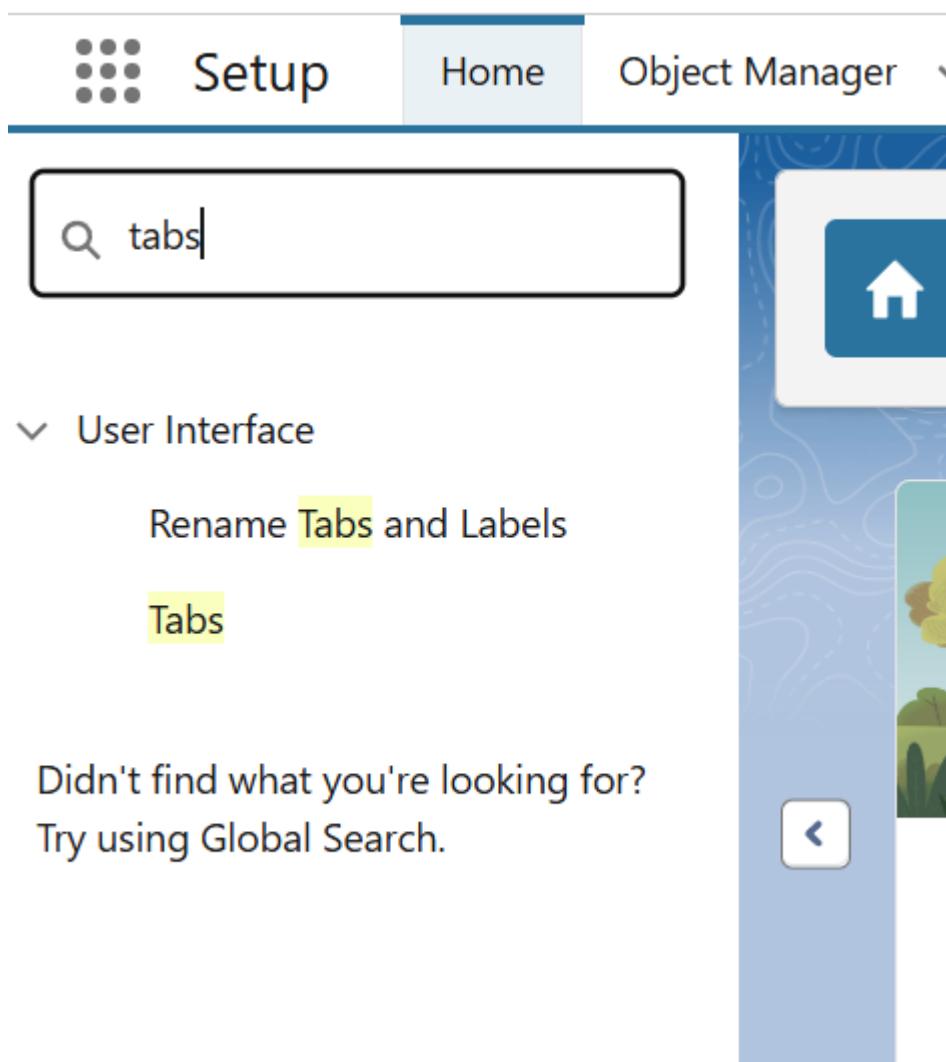
The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes tabs for 'Setup', 'Home', and 'Object Manager'. The main title is 'SETUP > OBJECT MANAGER' followed by 'Billing Process'. On the left, a sidebar lists various configuration options: Fields & Relationships, Page 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 'Details' and contains the following fields:

Description	
API Name	<input type="text" value="Billing_Process__c"/>
Custom	<input checked="" type="checkbox"/>
Singular Label	<input type="text" value="Billing Process"/>
Plural Label	<input type="text" value="Billing Process"/>
Enable Reports	<input checked="" type="checkbox"/>
Track Activities	
Track Field History	<input checked="" type="checkbox"/>
Deployment Status	<input type="text" value="Deployed"/>
Help Settings	<input type="text" value="Standard salesforce.com Help Window"/>

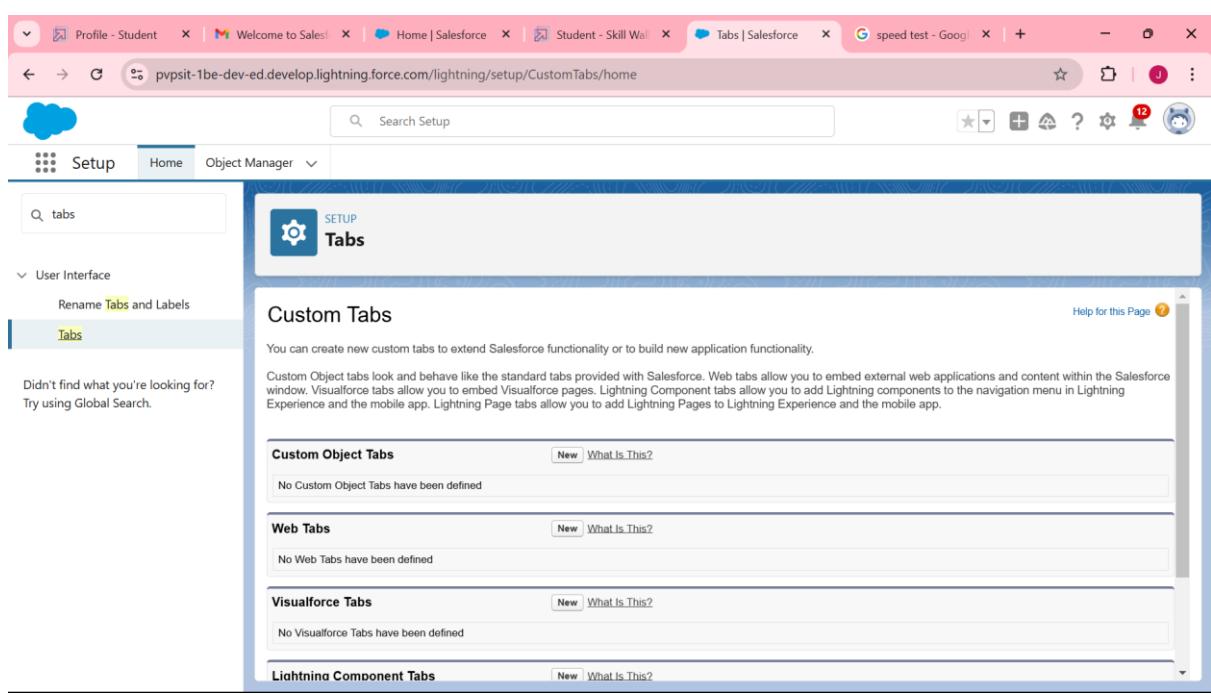
At the bottom right of the main content area are 'Edit' and 'Delete' buttons.

TABS

Salesforce Setup interface showing the search bar with "tabs" entered. A sidebar on the left shows "User Interface" sections: "Rename Tabs and Labels" and "Tabs". A large image on the right illustrates a mobile device screen with a home tab icon.



Screenshot of a web browser showing the Salesforce Setup page for Custom Tabs. The search bar contains "tabs". The "Tabs" section is selected in the sidebar. The main content area displays information about Custom Tabs and lists sections for Custom Object Tabs, Web Tabs, Visualforce Tabs, and Lightning Component Tabs, all of which currently have no items defined.



Salesforce Setup screenshot showing the 'Tabs' configuration page.

The URL in the browser is pvpst-1be-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2FobjectCustomTabWizard.jsp%3FretUR...

The page title is "SETUP Tabs".

The main content area displays the "New Custom Object Tab" configuration form:

- Object:** Total Laptops
- Tab Style:** Laptop
- (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
- Description:** (Empty text area)

At the bottom right of the form are "Next" and "Cancel" buttons.

The screenshot shows the Salesforce Setup interface with the 'Tabs' wizard open. The title bar says 'SETUP Tabs'. The main area is titled 'New Custom Object Tab' and 'Step 2. Add to Profiles'. It asks to choose user profiles for the new tab. A radio button is selected for 'Apply one tab visibility to all profiles | Default On'. Below this is a table mapping profiles to tab visibility settings. The profiles listed include Analytics Cloud Integration User, Analytics Cloud Security User, Authenticated Website, B2B Reordering Portal Buyer Profile, Contract Manager, and Cross Org Data Proxy User. Each profile has a dropdown menu set to 'Default On'.

The screenshot shows the Salesforce Setup interface with the 'Tabs' wizard open. The title bar says 'SETUP Tabs'. The main area is titled 'Step 3. Add to Custom Apps'. It asks to choose custom apps for the new tab. A checkbox labeled 'Include Tab' is checked. Below is a table listing standard custom apps. Each app has an 'Include Tab' checkbox next to it, which is unchecked for all listed items.

Custom App	Include Tab
Platform (standard_Platform)	<input type="checkbox"/>
Sales (standard_Sales)	<input type="checkbox"/>
Service (standard_Service)	<input type="checkbox"/>
Marketing CRM Classic (standard_Marketing)	<input type="checkbox"/>
Sample Console (standard_ServiceConsole)	<input type="checkbox"/>
High Volume Customer Portal User	<input type="checkbox"/>
Authenticated Website User	<input type="checkbox"/>
App Launcher (standard_AppLauncher)	<input type="checkbox"/>
Community (standard_Community)	<input type="checkbox"/>
Site.com (standard_Sites)	<input type="checkbox"/>

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 has a search bar and a toolbar with icons for star, plus, question mark, gear, and refresh. The left sidebar shows 'User Interface' sections for 'Rename Tabs and Labels' and 'Tabs'. A message says 'Didn't find what you're looking for? Try using Global Search.' The central panel is titled 'Custom Tabs' and contains sections for 'Custom Object Tabs', 'Web Tabs', and 'Visualforce Tabs'. The 'Custom Object Tabs' section lists a single entry: 'Total Laptops' with a tab style of 'Laptop'.

Tabs ---- Consumer

The screenshot shows the Salesforce Setup interface with the 'New Custom Object Tab' wizard open. The top navigation bar and sidebar are identical to the previous screenshot. The central panel is titled 'Choose the custom object for this new custom tab. Fill in other details.' It has a header 'New Custom Object Tab' with a note 'Required Information'. The 'Object' dropdown is set to 'Consumer'. The 'Tab Style' section shows 'People' selected. Below that, it says '(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.' The 'Splash Page Custom Link' dropdown is set to '--None--'. There is a text input field for 'Description' which is empty. At the bottom right are 'Next' and 'Cancel' buttons.

The screenshot shows the Salesforce Setup interface with the 'Tabs' wizard open. The title bar says 'SETUP Tabs'. The main area is titled 'New Custom Object Tab' and 'Step 2 of 3'. It asks to choose user profiles for the new tab. A radio button is selected for 'Apply one tab visibility to all profiles | Default On'. Below this is a table mapping profiles to tab visibility settings. The profiles listed are: Analytics Cloud Integration User, Analytics Cloud Security User, Authenticated Website, B2B Reordering Portal Buyer Profile, Contract Manager, and Cross Org Data Proxy User. Each profile has a dropdown menu set to 'Default On'.

The screenshot shows the Salesforce Setup interface with the 'Tabs' wizard open. The title bar says 'SETUP Tabs'. The main area is titled 'Step 3. Add to Custom Apps' and 'Step 3 of 3'. It asks to choose custom apps for the new tab. A table lists various standard and custom apps with checkboxes for 'Include Tab'. The apps listed are: Platform (standard_Platform), Sales (standard_Sales), Service (standard_Service), Marketing CRM Classic (standard_Marketing), Sample Console (standard_ServiceConsole), High Volume Customer Portal User, Authenticated Website User, App Launcher (standard_AppLauncher), Community (standard_Community), and Site.com (standard_Sites). The 'Include Tab' checkbox is unchecked for all items.

The screenshot shows the Salesforce Setup interface with the 'Tabs' page selected. The left sidebar has 'User Interface' expanded, with 'Tabs' selected. A search bar at the top right contains 'Search Setup'. The main content area is titled 'SETUP Tabs' and lists various standard tabs: Sales Console, Service Console, Sales, Lightning Usage App, Digital Experience, Queue Management, Data Manager, Subscription Management, Business Rules Engine, Salesforce Scheduler Setup, Bolt Solutions, and Automation. A checkbox 'Append tab to users' existing personal customizations' is checked. At the bottom right are 'Previous', 'Save', and 'Cancel' buttons.

Tabs ---- billing process

The screenshot shows the 'New Custom Object Tab' wizard, Step 1: Choose the custom object for this new custom tab. It asks to select an existing custom object or create a new one. The 'Object' dropdown is set to 'Billing Process'. The 'Tab Style' dropdown is set to 'Shopping Cart'. Below, it says '(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.' with a 'Splash Page Custom Link' dropdown set to 'None'. There is also a 'Description' input field. At the bottom right are 'Next' and 'Cancel' buttons.

Screenshot of the Salesforce Setup interface showing the 'Tabs' setup wizard.

The title bar shows multiple tabs: Profile - Student, Welcome to Sales!, Home | Salesforce, Student - Skill Wall, Tabs | Salesforce, speed test - Google, and others.

The main area displays the 'New Custom Object Tab' screen under 'Step 2. Add to Profiles'.

Step 2. Add to Profiles (Step 2 of 3)

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.

Apply one tab visibility to all profiles (Default On) Apply a different tab visibility for each profile

Profile	Tab Visibility
Analytics Cloud Integration User	Default On
Analytics Cloud Security User	Default On
Authenticated Website	Default On
Authenticated Website	Default On
B2B Reordering Portal Buyer Profile	Default On
Contract Manager	Default On
Cross Org Data Proxy User	Default On

Screenshot of the Salesforce Setup interface showing the 'Tabs' setup wizard.

The title bar shows multiple tabs: Profile - Student, Welcome to Sales!, Home | Salesforce, Student - Skill Wall, Tabs | Salesforce, speed test - Google, and others.

The main area displays the 'Step 3. Add to Custom Apps' screen.

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	Include Tab
Platform (standard_Platform)	<input type="checkbox"/>
Sales (standard_Sales)	<input type="checkbox"/>
Service (standard_Service)	<input type="checkbox"/>
Marketing CRM Classic (standard_Marketing)	<input type="checkbox"/>
Sample Console (standard_ServiceConsole)	<input type="checkbox"/>
High Volume Customer Portal User	<input type="checkbox"/>
Authenticated Website User	<input type="checkbox"/>
App Launcher (standard_AppLauncher)	<input type="checkbox"/>
Community (standard_Community)	<input type="checkbox"/>
Site.com (standard_Sites)	<input type="checkbox"/>

The screenshot shows the Salesforce Setup interface with the 'Tabs' page selected. The left sidebar has 'User Interface' expanded, with 'Tabs' selected. A search bar at the top right contains 'Search Setup'. The main content area is titled 'SETUP Tabs' and lists various standard tabs. A checkbox at the bottom left is checked, labeled 'Append tab to users' existing personal customizations'. At the bottom right are 'Previous', 'Save', and 'Cancel' buttons.

Tab Name	Action Column
Sales Console (standard__LightningSalesConsole)	<input type="checkbox"/>
Service Console (standard__LightningService)	<input type="checkbox"/>
Sales (standard__LightningSales)	<input type="checkbox"/>
Lightning Usage App (standard__LightningInstrumentation)	<input type="checkbox"/>
Digital Experience (standard__SalesforceCMS)	<input type="checkbox"/>
Queue Management (standard__QueueManagement)	<input type="checkbox"/>
Data Manager (standard__DataManager)	<input type="checkbox"/>
Subscription Management (standard__RevenueCloudConsole)	<input type="checkbox"/>
Business Rules Engine (standard__ExpressionSetConsole)	<input type="checkbox"/>
Salesforce Scheduler Setup (standard__LightningScheduler)	<input type="checkbox"/>
Bolt Solutions (standard__LightningBolt)	<input type="checkbox"/>
Automation (standard__FlowsApp)	<input type="checkbox"/>

Tab -----Laptop Bookings

The screenshot shows the 'New Custom Object Tab' configuration page. The 'Object' dropdown is set to 'Laptop Bookings'. The 'Tab Style' dropdown is set to 'Presenter'. An optional 'Splash Page Custom Link' field is set to '--None--'. A large text input field for 'Description' is empty. At the bottom right are 'Next' and 'Cancel' buttons.

The screenshot shows the Salesforce Setup interface with the 'Tabs' wizard open. The title bar says 'SETUP Tabs'. The main area is titled 'New Custom Object Tab' and 'Step 2. Add to Profiles'. It asks to choose user profiles for the new tab. A radio button is selected for 'Apply one tab visibility to all profiles | Default On'. Below this is a table mapping profiles to tab visibility settings.

Profile	Tab Visibility
Analytics Cloud Integration User	Default On
Analytics Cloud Security User	Default On
Authenticated Website	Default On
Authenticated Website	Default On
B2B Reordering Portal Buyer Profile	Default On
Contract Manager	Default On
Cross Org Data Proxy User	Default On

The screenshot shows the Salesforce Setup interface with the 'Tabs' wizard open. The title bar says 'SETUP Tabs'. The main area is titled 'Step 3. Add to Custom Apps'. It asks to choose custom apps for the new tab. A checkbox labeled 'Include Tab' is checked. Below is a table listing standard custom apps.

Custom App	Include Tab
Platform (standard_Platform)	<input type="checkbox"/>
Sales (standard_Sales)	<input type="checkbox"/>
Service (standard_Service)	<input type="checkbox"/>
Marketing CRM Classic (standard_Marketing)	<input type="checkbox"/>
Sample Console (standard_ServiceConsole)	<input type="checkbox"/>
High Volume Customer Portal User	<input type="checkbox"/>
Authenticated Website User	<input type="checkbox"/>
App Launcher (standard_AppLauncher)	<input type="checkbox"/>
Community (standard_Community)	<input type="checkbox"/>
Site.com (standard_Sites)	<input type="checkbox"/>

The screenshot shows the Salesforce Setup interface with the 'Tabs' page selected. The left sidebar has 'User Interface' expanded, with 'Tabs' selected. The main content area displays a list of standard tabs:

- Sales Console (standard__LightningSalesConsole)
- Service Console (standard__LightningService)
- Sales (standard__LightningSales)
- Lightning Usage App (standard__LightningInstrumentation)
- Digital Experience (standard__SalesforceCMS)
- Queue Management (standard__QueueManagement)
- Data Manager (standard__DataManager)
- Subscription Management (standard__RevenueCloudConsole)
- Business Rules Engine (standard__ExpressionSetConsole)
- Salesforce Scheduler Setup (standard__LightningScheduler)
- Bolt Solutions (standard__LightningBolt)
- Automation (standard__FlowsApp)

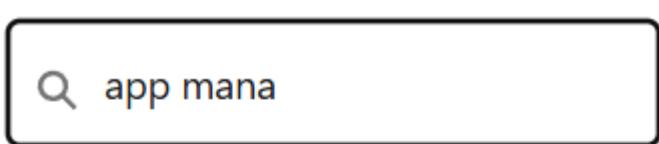
A checkbox at the bottom left is checked, labeled 'Append tab to users' existing personal customizations'. At the bottom right are 'Previous', 'Save', and 'Cancel' buttons.

The screenshot shows the Salesforce Setup interface with the 'Custom Tabs' page selected. The left sidebar has 'User Interface' expanded, with 'Custom Tabs' selected. The main content area displays a message: "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." Below this is a section titled "Custom Object Tabs" with a table:

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	

Below this is a section titled "Web Tabs" with a message: "No Web Tabs have been defined".

Lightning app



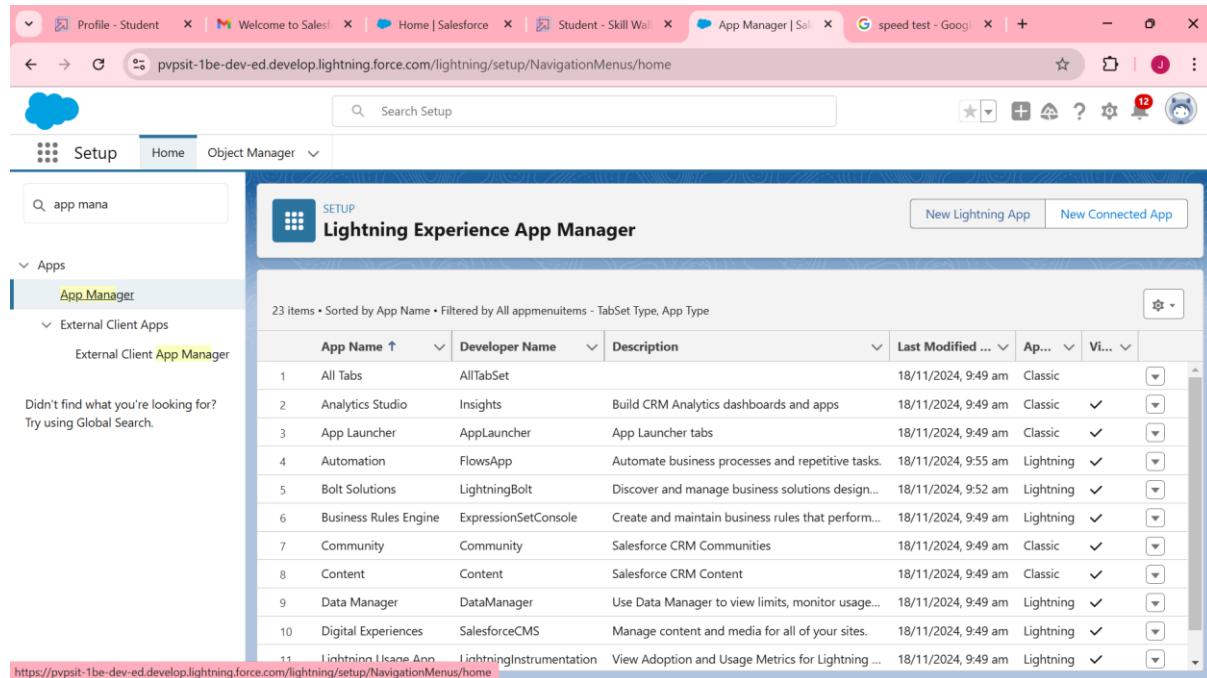
_APPS

App Manager

External Client Apps

External Client App Manager

Didn't find what you're looking for?



A screenshot of the Salesforce Lightning Experience App Manager page. The URL in the browser is `https://pvpst-1be-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home`. The page title is "Lightning Experience App Manager". A search bar at the top left contains "app mana". The main content area shows a table of 23 items, sorted by App Name. The columns are: App Name, Developer Name, Description, Last Modified, Type, and several checkboxes. The table includes rows for All Tabs, Analytics Studio, App Launcher, Automation, Bolt Solutions, Business Rules Engine, Community, Content, Data Manager, Digital Experiences, and Lightning Usage App.

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

Screenshot of the Salesforce App Manager interface showing the creation of a new Lightning App.

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

The page title is "New Lightning App".

App Details section:

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

App Branding section:

- Image: A thumbnail image of a laptop.
- Primary Color Hex Value: #0070D2

Org Theme Options:

- Use the app's image and color instead of the org theme

Buttons at the bottom right:

- Next

Bottom navigation bar:

- Data Manager
- Marketing Cloud
- Use Data Manager to view limits, monitor usage... 10/11/2024, 9:49 am Lightning
- 10 Digital Experiences SalesforceCMS Manage content and media for all of your sites. 18/11/2024, 9:49 am Lightning
- 11 Lightning Usage App LightningInstrumentation View Adoption and Usage Metrics for Lightning ... 18/11/2024, 9:49 am Lightning

Screenshot of the "New Lightning App" configuration screen in the Salesforce Setup.

App Options

Navigation and Form Factor

- Navigation Style:** Standard navigation (selected)
- Console navigation

Supported Form Factors:

- Desktop and phone (selected)
- Desktop
- Phone

Setup and Personalization

Setup Experience:

- Setup (full set of Setup options) (selected)
- Service Setup

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**

The status bar at the bottom shows: Data Manager, Data Manager, Use Data Manager to view limits, monitor usage... 10/11/2024, 9:45 am, Lightning, etc.

Screenshot of the "Utility Items (Desktop Only)" configuration screen in the Salesforce Setup.

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**

The status bar at the bottom shows: Data Manager, Data Manager, Use Data Manager to view limits, monitor usage... 10/11/2024, 9:45 am, Lightning, etc.

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

Total Laptops
consumer
Laptop Bookings
Billing Process

New Lightning App

User Profiles

Choose the user profiles that can access this app.

Available Profiles

Salesforce API Only System Integrations

Selected Profiles

System Administrator

Profile - Student | Welcome to Sales! | Home | Salesforce | Student - Skill Wall | App Manager | Sales | laptop images - Google | +

Search Setup

Setup | Home | Object Manager

Q app mana

Lightning Experience App Manager

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

App Name	Developer Name	Description	Last Modified ...	Ap...	Vi...
2 Analytics Studio	Insights	Build CRM Analytics dashboards and apps	18/11/2024, 9:49 am	Classic	<input checked="" type="checkbox"/>
3 App Launcher	AppLauncher	App Launcher tabs	18/11/2024, 9:49 am	Classic	<input checked="" type="checkbox"/>
4 Automation	FlowsApp	Automate business processes and repetitive tas...	18/11/2024, 9:55 am	Lightning	<input checked="" type="checkbox"/>
5 Bolt Solutions	LightningBolt	Discover and manage business solutions design...	18/11/2024, 9:52 am	Lightning	<input checked="" type="checkbox"/>
6 Business Rules Engi...	ExpressionSetConsole	Create and maintain business rules that perform...	18/11/2024, 9:49 am	Lightning	<input checked="" type="checkbox"/>
7 Community	Community	Salesforce CRM Communities	18/11/2024, 9:49 am	Classic	<input checked="" type="checkbox"/>
8 Content	Content	Salesforce CRM Content	18/11/2024, 9:49 am	Classic	<input checked="" type="checkbox"/>
9 Data Manager	DataManager	Use Data Manager to view limits, monitor usage...	18/11/2024, 9:49 am	Lightning	<input checked="" type="checkbox"/>
10 Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	18/11/2024, 9:49 am	Lightning	<input checked="" type="checkbox"/>
11 LAPTOP RENTALS	LAPTOP_RENTALS		18/11/2024, 11:06 am	Lightning	<input checked="" type="checkbox"/>
12 Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning ...	18/11/2024, 9:49 am	Lightning	<input checked="" type="checkbox"/>

Fields

Creating the field in consumer object

The screenshot shows two screenshots of the Salesforce setup interface. The top screenshot is the 'Object Manager' page, showing a single item named 'consumer' which is a 'Custom Object'. The bottom screenshot is the 'Fields & Relationships' page for the 'consumer' object, listing four fields: 'consumer_name' (Name, Text(80), indexed), 'Created By' (CreatedById, Lookup(User)), 'Last Modified By' (LastModifiedById, Lookup(User)), and 'Owner' (OwnerId, Lookup(User,Group)).

Object Manager

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

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)		✓

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

Data Type

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

Help for this Page

Screenshot of the Salesforce Setup Object Manager for the 'consumer' object. The user has selected 'Lookup Relationship' as the field type.

Fields & Relationships

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

Next Cancel

The screenshot shows the Salesforce Object Manager setup screen for the 'consumer' object. The left sidebar lists various configuration options under 'Fields & Relationships'. The main area displays 'Step 2. Enter the details' of a new field named 'Phone_number'. The field is defined with the following properties:

- 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

A formula syntax help text is visible below the default value input field:

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

Screenshot of Step 3: Establish field-level security for the 'Phone number' custom field on the 'consumer' object.

Field Label: Phone number
Data Type: Phone
Field Name: Phone_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
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	✓	□

Help for this Page ?

Screenshot of Step 4: Add to page layouts for the 'Phone number' custom field on the 'consumer' object.

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.

Add Field Page Layout Name
✓ consumer Layout

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

Help for this Page ?

Screenshot of the Salesforce Setup Object Manager for the 'consumer' object.

Left Sidebar:

- 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

Main Content Area:

consumer 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.

- 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

Buttons: Help for this Page, Next, Cancel

Screenshot of the Salesforce Object Manager.

Top Navigation:

- Setup
- Home
- Object Manager

Search Bar: consumer

Create: Create ▾

Table:

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

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

The left sidebar shows the following navigation items:

- 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

The main content area displays the 'Fields & Relationships' table:

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 interface showing the Field Types section for the 'consumer' object.

The left sidebar shows the following navigation items:

- 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

The main content area displays the 'Field Types' section:

- Lookup Relationship**: 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 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 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.
- 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.

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"/>

The screenshot shows the Salesforce Setup interface for the 'Object Manager'. The left sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, and Record Types. Under 'Fields & Relationships', 'New Custom Field' is selected. The main content area displays 'Step 4. Add to page layouts' of a 4-step process. The field configuration is as follows:

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

A note below says: "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." A checkbox labeled "Add Field" is checked, and the "Page Layout Name" dropdown contains "consumer Layout". At the bottom, there are buttons for "Previous", "Save & New", "Save", and "Cancel".

Screenshot of the Salesforce Object Manager interface for the 'consumer' object.

The left sidebar shows the 'Fields & Relationships' section under 'Details'.

The main area displays the 'Fields & Relationships' table:

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 interface for the 'consumer' object, showing the 'Fields & Relationships' configuration screen.

The left sidebar shows the 'Fields & Relationships' section under 'Details'.

The right pane displays a list of field types with their descriptions:

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

Descriptions for each field type:

- 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.

Buttons at the bottom right: Next, Cancel.

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

Step 2. Enter the details

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

Default Value: Show Formula Editor

Use formula syntax: Enclose text and picklist value API names in double quotes ('The_Text'), include numbers without quotes : (2), show percentages as decimals (.10), and express date calculations in the standard format: (Today) + 7. To reference a field from a Custom Metadata type record use: \${CustomMetadata_Type__md.RecordApiName.FieldName__c}

Buttons: Previous, Next, Cancel

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

Step 3. Establish field-level security

Field Label: Address

Data Type: Text Area

Field Name: Address

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 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"/>

Buttons: Previous, Next, Cancel

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

The page shows the 'New Custom Field' configuration screen, Step 4 of 4. The field is named 'Address' with a Text Area data type. It is being added to the 'consumer Layout'.

Field Label	Address
Data Type	Text Area
Field Name	Address
Description	

Instructions indicate that the field will be added as the last field in the first 2-column section of the page layout. To change the location, customize the page layout.

Buttons at the bottom include 'Add Field', 'Page Layout Name' (set to consumer Layout), and 'Save & New'.

Screenshot of the Salesforce Setup interface showing the 'Fields & Relationships' list for the 'consumer' object.

The list displays various fields, including:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address_c	Text Area(255)		
consumer_name	Name	Text(80)		✓
Created By	CreatedBy	Lookup(User)		
Email	Email_c	Email		
Last Modified By	LastModifiedBy	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.

Fields & Relationships section selected in the sidebar.

Field Type Options:

- 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.

Step 2. Enter the details (Step 2 of 4) configuration for the 'consumer_Status' field.

Field Label: consumer Status

Values: Enter values, with each value separated by a new line
 Student
 Employee
 Others

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: consumer_Status

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. ('Name'), include numbers without quotes. (10), show percentages as decimals (.10), and express date calculations in the standard format: (Today) + 7, To reference a field from a Custom Metadata type record use \${CustomMetadata_Type__not RecordAPIName:Field__c}

The screenshot shows the Salesforce Setup interface for creating a new custom field named "consumer_Status". The left sidebar lists various setup categories under "Fields & Relationships". The main panel is titled "Step 3. Establish field-level security" and displays the following details:

Field Label	consumer Status
Data Type	Picklist
Field Name	consumer_Status
Description	(empty)

Below this, a table titled "Field-Level Security for Profile" lists ten user profiles with checkboxes for "Visible" and "Read-Only" permissions. Most profiles have both checkboxes checked.

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	✓	✗

The screenshot shows the Salesforce Setup interface for creating a new custom field named "consumer_Status". The left sidebar lists various setup categories under "Fields & Relationships". The main panel is titled "Step 4. Add to page layouts" and displays the following details:

Field Label	consumer Status
Data Type	Picklist
Field Name	consumer_Status
Description	(empty)

Below this, a table titled "Add Field" lists one page layout: "consumer Layout". A note below says "When finished, click Save & New to create more custom fields, or click Save if you are done."

Add Field	Page Layout Name
✓	consumer Layout

Creating the field in laptops bookings object

Setup Home Object Manager

Object Manager

2 Items, Sorted by Label

Label	API Name	Type	Description	Last Modified	Deployed
Laptop Bookings	Laptop_Bookings__c	Custom Object		18/11/2024	✓

Profile - Student | Welcome to Sales| Home | Salesforce | Student - Skill Wall | Laptop Bookings | laptop images - G | + | - | ○ | X | 🔍 | ⌂ | 🗑 | 📁 | 🎯 | 🚫 | 🎯 | :

Search Setup

SETUP > OBJECT MANAGER

Laptop Bookings

Details Fields & Relationships

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)		✓

Quick Find New Deleted Fields Field Dependencies Set History Tracking

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

Profile - Student | Welcome to Sales| Home | Salesforce | Student - Skill Wall | Laptop Bookings | laptop images - G | + | - | ○ | X | 🔍 | ⌂ | 🗑 | 📁 | 🎯 | 🚫 | 🎯 | :

Search Setup

Setup Home Object Manager

Laptop Bookings

Details Fields & Relationships

Fields & Relationships

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

- External Lookup Relationship
- Checkbox
- Currency
- Date
- Date/Time
- Email
- Geolocation
- Number
- Percent
- Phone
- Picklist**
- Picklist (Multi-Select)
- Text
- Text Area
- Text Area (Long)
- Text Area (Rich)

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

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' under 'Object Manager'. The left sidebar shows 'Fields & Relationships' selected. The main form is titled 'Step 2. Enter the details' of a 'New Custom Field'.

Field Label: Laptop names

Values:

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

Error: A global picklist definition must be selected

Dell
Acer
Hp
Mac

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: Laptop_names

Description:

Screenshot of Step 3: Establish field-level security for the Laptop Bookings object.

Laptop Bookings

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

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.

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"/>

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

Screenshot of Step 4: Add to page layouts for the Laptop Bookings object.

Laptop Bookings

New Custom Field

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

Help for this Page 

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.

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

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

The left sidebar shows the following navigation:

- 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

The main content area displays the "Fields & Relationships" section with the following 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)		✓

Screenshot of the Salesforce Object Manager interface for the Laptop Bookings object, showing the "Fields & Relationships" configuration screen.

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

The main content area displays the "Fields & Relationships" configuration screen with the following table:

FIELD TYPE	DESCRIPTION
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.
Data/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.

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
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.

Previous Save & New Save Cancel

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
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"/>
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"/>
Customer Community Login User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Customer Community Plus Login User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Customer Community Plus User	<input checked="" type="checkbox"/>	<input type="checkbox"/>

To create a fields and relationship to an laptop booking object

Screenshot of the Salesforce Setup interface showing the 'Edit Field Dependency' page for the 'core type' field. The 'Controlling Field' is 'Laptop names' and the 'Dependent Field' is 'core type'. The 'Instructions' section provides guidance on using the grid to include or exclude values. The grid shows a list of laptop names (Dell, Acer, Hp) and core types (core i3, Core i5, Core i7, Bionic chip), with some values highlighted in yellow.

Screenshot of the Salesforce Setup interface showing the 'Fields & Relationships' section for the 'Laptop Bookings' object. The table lists fields such as 'core type', 'Created By', 'Laptop Bookings', 'Laptop names', 'Last Modified By', and 'Owner'. The 'core type' field is identified as the 'CONTROLLING FIELD' for the 'Laptop names' field.

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)		✓

To Create a Fields & Relationship to an Laptop Booking Object

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

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 is titled "Data Type" and asks to "Specify the type of information that the custom field will contain." It lists several options:

- 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** (selected): 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.
 - The relationship field is required on all detail records.
 - The relationship field of a detail record is 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 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.

Laptop Bookings
New Relationship

Help for this Page ?

Step 2. Choose the related object

Select the other object to which this object is related.

Related To: Consumer

Step 2

Previous Next Cancel

Previous Next Cancel

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Setup Home Object Manager

Search Setup

Laptop Bookings New Relationship

Step 3. Enter the label and name for the lookup field Step 3 of 6

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.

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!](#)

Show Filter Settings

Help for this Page

Previous Next Cancel

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

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Setup Home Object Manager

Search Setup

Laptop Bookings New Relationship

Step 4. Establish field-level security for reference field Step 4 of 6

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"/>
Identify User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Marketing User	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Help for this Page

Previous Next Cancel

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

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

Screenshot of Step 5: Add reference field to Page Layouts

Laptop Bookings New Relationship

Step 5. Add reference field to Page Layouts

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

Help for this Page

Step 5 of 6

Previous Next Cancel

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

The left sidebar shows the 'Fields & Relationships' section selected. The main area displays 'Step 6. Add custom related lists' of the 'New Relationship' wizard.

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

Related List Label: Laptop Bookings

Add Related List - Page Layout Name: consumer Layout

Append related list to users' existing personal customizations:

Buttons at the bottom: Previous, Save & New, Save, Cancel.

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

The left sidebar shows the 'Fields & Relationships' section selected. The main area displays the 'Data Type' configuration screen.

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 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.

Buttons at the bottom: Next, Cancel.

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Setup Home Object Manager

Search Setup

Help for this Page

Laptop Bookings
New Custom Field

Step 2. Enter the details Step 2 of 4

Field Label: Amount

Length: 18

Field Name: Amount

Description: Amount

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 editor: Enclose text and specific value API names in double quotes. ("Name"), include numbers without quotes (25), show percentages as decimals (.10), and express date calculations in the standard format (Today) + 7. To reference a field from a Custom Metadata type record use: \$CustomMetadataType\$Record\$FieldName\$

Previous Next Cancel

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Setup Home Object Manager

Search Setup

Help for this Page

Laptop Bookings
New Custom Field

Step 4. Add to page layouts Step 4 of 4

Field Label: Amount

Data Type: Currency

Field Name: Amount

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.

Previous Save & New Save Cancel

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Setup Home Object Manager Search Setup Help for this Page

Laptop Bookings

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 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.
 - 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.
- Master-Detail Relationship
- External Lookup Relationship Allows users to select a True (checked) or False (unchecked) value.
- Checkbox 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.
- Currency Allows users to enter a date or pick a date from a popup calendar.
- Date

Step 2. Choose the related object

Select the other object to which this object is related.

Related To

Help for this Page

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Setup Home Object Manager Search Setup Help for this Page

Laptop Bookings

New Relationship

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

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.

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!](#)

[Show Filter Settings](#)

Step 3 of 6

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Setup Home Object Manager Search Setup Help for this Page

Laptop Bookings

New Relationship

Step 6. Add custom related lists Step 6 of 6

Field Label: Total No Of Laptops
Data Type: Lookup
Field Name: Total_No_Of_Laptops

Related List Label: Laptop Bookings

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 Related List Page Layout Name: Total Laptops Layout

Append related list to users' existing personal customizations

Previous Save & New Save Cancel

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Setup Home Object Manager Search Setup Help for this Page

Laptop Bookings

Fields & Relationships

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 creation 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 roll-up 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.

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 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.

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Setup Home Object Manager

Search Setup

Help for this Page

Laptop Bookings New Custom Field

Step 2. Enter the details Step 2 of 4

Field Label: email

Field Name: email

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_Label"), include numbers without quotes (25), show percentages as decimal (.01), and express date calculations in the standard format: (Today) + 7. To reference a field from a custom metadata type record use: <CustomMetadata_Type>.RecordName.Field>

Previous Next Cancel

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pvpst-1be-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdM000003Fa9V/FieldsAndRelationships/new

Setup Home Object Manager

Search Setup

Help for this Page

Laptop Bookings New Custom Field

Step 4. Add to page layouts Step 4 of 4

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

Laptop Bookings 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 Object Manager interface for the 'Laptop Bookings' object.

The page title is 'Laptop Bookings' under 'Object Manager'. The left sidebar shows navigation links for various setup categories like Page Layouts, Lightning Record Pages, etc. The main content area displays the 'Fields & Relationships' section for the 'Laptop Bookings' object.

Fields & Relationships

9 items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount_c	Currency(18, 0)		
core type	core_type_c	Picklist	Laptop names	
Created By	CreatedById	Lookup(User)		
email	email_c	Email		
Laptop Bookings	Name	Text(80)		✓
Laptop names	Laptop_names_c	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name_c	Master-Detail(consumer)		✓
Total No Of Laptops	Total_No_Of_Laptops_c	Master-Detail(Total Laptops)		✓



SETUP > OBJECT MANAGER

Total Laptops

Step 1. Choose the field type

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

Data Type

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

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

External Lookup Relationship

The ownership and sharing of a detail record are determined by the master record.

Auto Number

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.

Formula

Allows users to enter 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

Next | Cancel | Step 1

SETUP > OBJECT MANAGER

Total Laptops

Step 2. Enter the details

Field Label:

Field Name:

Description:

Help Text:

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

Previous | Next | Cancel | Step 2 of 5

Screenshot of the Salesforce Setup Object Manager interface for creating a new custom field named "Total Laptops".

The left sidebar shows the "Fields & Relationships" section selected. The main area displays "Step 3. Define the summary calculation" of a "New Custom Field".

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

Select Roll-Up Type: COUNT (selected), SUM, MIN, MAX. Field to Aggregate: None.

Filter Criteria: All records should be included in the calculation (selected).

Help for this Page | Step 3 of 5 | Previous | Next | Cancel

Screenshot of the Salesforce Setup Object Manager interface for creating a new custom field named "Total Laptops".

The left sidebar shows the "Fields & Relationships" section selected. The main area displays "Step 5. Add to page layouts" of a "New Custom Field".

Field Label: Laptops delivered, **Data Type:** Roll-Up Summary, **Field Name:** Laptop_delivered.

Add Field Page Layout Name: Total Laptops Layout (checkbox checked).

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

Help for this Page | Step 5 of 5 | Previous | Save & New | Save | Cancel

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

Laptop Bookings

Step 1. Choose the field type

Data Type

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

Help for this Page

Step 1

Next Cancel

Screenshot of the Salesforce Setup interface showing the configuration of the formula field 'Laptops Available'.

Step 2. Choose output type

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

Formulas Return Type

- None Selected
- Checkbox
- Currency
- Date
- DateTime
- Number
- Percent
- Text
- Time
- Options

Decimal Places: 0 Example: 999

Help for this Page

Step 2 of 5

Previous Next Cancel

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

The page shows the formula editor for a field named "Laptops Available (Number)".

Formula: `0 - COUNT(Laptops_Booked__c)`

Functions panel:

- ABS
- ACOS
- ADDMONTHS
- AND
- ASCII
- ASIN

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

Fields & Relationships sidebar:

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

The page shows Step 5: Add to page layouts.

Field details:

- Field Label: Laptops Available
- Data Type: Formula
- Field Name: Laptops_Available
- 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.

Buttons at the bottom:

- Previous
- Save & New
- Save
- Cancel

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

The sidebar on the left lists various setup 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, and Flow Triggers.

The main content area displays a list of field types under the 'Formula' category:

- Roll-Up Summary
- Lookup Relationship
- Master-Detail Relationship
- External Lookup Relationship

Each item has a detailed description and a list of features or notes.

Screenshot of the Salesforce Object Manager interface showing the configuration of a new field named 'how many months'.

The sidebar on the left shows the same list of setup categories as the previous screenshot.

The main content area is titled 'Step 2: Enter the details' (Step 2 of 4).

Field Label: 'how many months'

Values:
 Use global picklist value set
 Enter values, with each value separated by a new line
1
2
3
4
5

Field Name: 'how_many_months'

Description: (empty)

Help Text: (empty)

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: Encloses text and prints placeholder values in double quotes. The text must include numbers without quotes.
Example: =Text("Hello, " & [Name]) and outputs Hello, John in the standard output. Today() + 2
reference a field from a Custom Metadata type record use \$CustomMetadataType__mdt__RecordName.FieldName

Laptop Bookings
New Custom Field

Step 4. Add to page layouts

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.

Creation of Fields & Relationship for Billing Process Object

Billing Process

Step 1. Choose the field type

Data Type: Master-Detail Relationship (selected)

External Lookup Relationship

Related To: consumer

Step 2. Choose the related object

Related To: consumer

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

Billing Process

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 (selected)
ReadWrite (unselected)
Allow reparenting (checkbox)
Auto add to custom report type (checkbox)
Lookup Filter: Show Filter Settings

Help for this Page

Screenshot of Step 6: Add custom related lists

Billing Process

Step 6. Add custom related lists

Field Label: Name
Data Type: Master-Detail
Field Name: Name
Description:
Specify the title that the related list will have in all of the layouts associated with the parent.
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

Help for this Page

Billing Process

New Relationship

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
- Master-Detail Relationship
- External Lookup Relationship

Step 2. Choose the related object

Select the other object to which this object is related.

Related To: Laptop Bookings

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

Field Label: Laptop Booking

Field Name: Laptop_Booking

Description:

Help Text:

Child Relationship Name: Billing_Process

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.

What to do if the lookup record is deleted?

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

Step 3 of 6

Billing Process

New Relationship

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

Field Label: Laptop Booking

Field Name: Laptop_Booking

Description:

Help Text:

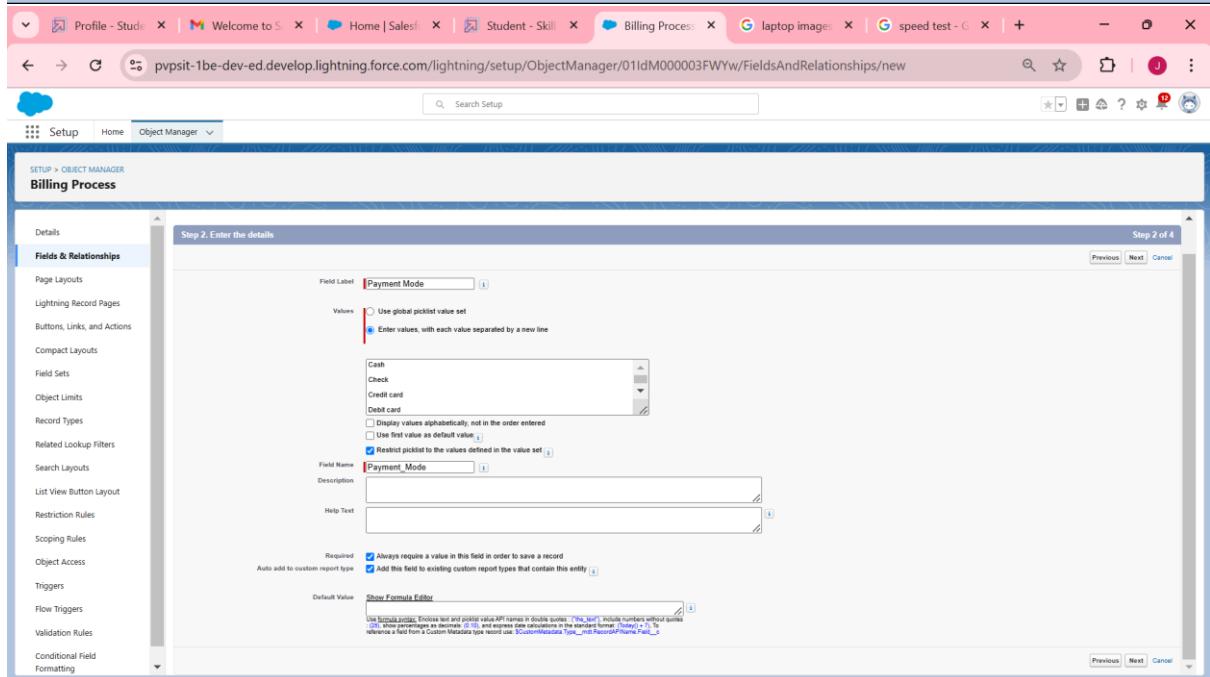
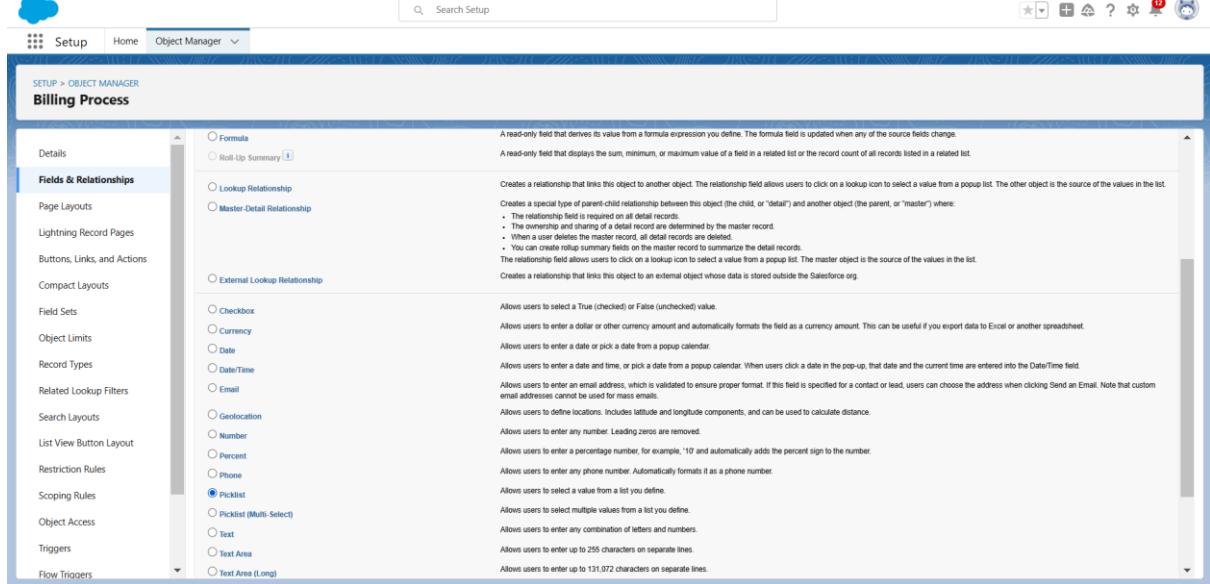
Child Relationship Name: Billing_Process

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.

What to do if the lookup record is deleted?

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

Step 3 of 6



Screenshot of the Salesforce Object Manager - Fields & Relationships step 4: Add to page layouts.

Billing Process

New Custom Field

Step 4. Add to page layouts

Field Label: Payment Mode
Data Type: Picklist
Field Name: Payment_Mode
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
 Billing Process Layout

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

Help for this Page

Step 4 of 4

Previous Save & New Save Cancel

Screenshot of the Salesforce Object Manager - Fields & Relationships step 1: Choose the field type.

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
 Auto Number
 Formula
 Roll Up Summary
 Lookup Relationship
 Master-Detail Relationship
 External Lookup Relationship
 Checkbox
 Currency
 Date

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.

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 master-detail relationship between this object (the child, or "detail") and another object (the parent, or "master") where:
• The relationship field is present on all detail records.
• The ownership and sharing of detail records 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.

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.

Help for this Page

Step 1

Next Cancel

Creating the field in Total Laptops object

SETUP Object Manager

1 Items. Sorted by Label

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Total Laptops	Total_Laptops__c	Custom Object		18/11/2024	✓

Profile - Student | Welcome to S | Home | Salesf | Student - Skill | Total Laptops | laptop image | speed test - G | +

pvsit-1be-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdM000003FZdF/FieldsAndRelationships/new

Cloud icon | Search Setup | Home | Object Manager | Step 1 | Next | Cancel

SETUP > OBJECT MANAGER

Total Laptops

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

Step 1. Choose the field type

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

Data Type

Select one of the data types below.

None Selected

Formula

Auto Number

Roll-Up Summary

Lookup Relationship

Master-Detail Relationship

External Lookup Relationship

Next | Cancel

The screenshot shows the Salesforce Object Manager interface for creating a new field named 'Laptops Available' on the 'Total Laptops' object. The 'Fields & Relationships' tab is selected. The 'Field Label' is set to 'Laptops Available' and the 'Field Name' is 'Laptops_Available'. The formula type is chosen as 'Number'. The formula is defined as 'Laptops Available (Number) = 60 - Laptops_delivered__c'. A dropdown menu on the right lists various functions such as ABS, ACOS, ADDMONTHS, AND, ASCII, ASIN, etc.

VALIDATION RULE

Creating the validation rule for phone number field in consumer object

Screenshot of the Salesforce Object Manager page:

The URL is <https://pvpst-1be-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home>

The page displays a list of objects:

Name	Type	Object 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

A context menu is open for the 'consumer' object, showing 'Edit' and 'Delete' options.

Below the list is a section titled 'Validation Rules' with 0 items.

Screenshot of the 'consumer' Validation Rule edit screen:

The URL is <https://pvpst-1be-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdM000003FZyD/ValidationRules/new>

The page title is 'consumer Validation Rule'.

The validation rule details are as follows:

Rule Name	Error Location	Error Message	Active	Modified By
Phonenumberoremailblankrule		phone number and email number should not be blank	<input checked="" type="checkbox"/>	

The 'Error Condition Formula' field contains the formula: `OR(ISBLANK(phone_number), ISBLANK(email__c))`.

The formula builder shows the following functions:

- Functions: ABS, ACOS, ADDMONTHS, AND, ASCII, ASIN
- Insert Selected Function: ABS(number)
- Help on this function: Returns the absolute value of a number, a number without its sign

Object Manager

consumer

Validation Rule

Condition: OR(ISBLANK(phone_number__c), ISBLANK(email__c))

Error Message: Please fill the phone number and email id

Help on this function: ABS(number)
Returns the absolute value of a number, a number without its sign

PROFILES

owner Profile

Profiles

Action	Profile Name	User License	Custom
<input type="checkbox"/>	Salesforce API Only System Integrations	Salesforce Integration	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Silver Partner User	Silver Partner	<input type="checkbox"/>
<input type="checkbox"/>	Solution Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/>	Standard Platform User	Salesforce Platform	<input type="checkbox"/>
<input type="checkbox"/>	Standard User	Salesforce	<input type="checkbox"/>
<input type="checkbox"/>	System Administrator	Salesforce	<input type="checkbox"/>

SETUP



Profiles

Clone Profile

Enter the name of the new profile.

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**

Profile - Studio | Welcome to S | Home | Salesf | Student - Skill | Profiles | Sales | laptop image | speed test - G | +

pvpsit-1be-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00edM000008DFD%2Fe%3FretURL%3D%25...

Setup Home Object Manager

Search Setup

Cloud icon

profiles

Users Profiles

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

SETUP

Profiles

IDEAS	WORK PLANS
Images <input checked="" type="checkbox"/>	Work Plan Templates <input checked="" type="checkbox"/>
Incidents <input type="checkbox"/>	Work Step Templates <input checked="" type="checkbox"/>
Individuals <input checked="" type="checkbox"/>	Work Types <input checked="" type="checkbox"/>
Inventory Reservations <input type="checkbox"/>	Work Type Groups <input checked="" type="checkbox"/>

Custom Object Permissions

Object	Basic Access					Data Administration					
	Read	Create	Edit	Delete	View All <small>i</small>	Modify All <small>i</small>	Read	Create	Edit	Delete	View All <small>i</small>
Billing Process	<input checked="" type="checkbox"/>										
consumer	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

User passwords expire in: 90 days

Enforce password history: 3 passwords remembered

Minimum password length: 8

Agent Profile

SETUP

Profiles

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

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

Save **Cancel**

SETUP

Profiles

Contacts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Addresses	<input type="checkbox"/>					
Contact Point Consents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Emails	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Push Topics	<input checked="" type="checkbox"/>					
Sellers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Streaming Channels	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
User External Credentials	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

Custom Object Permissions

	Basic Access					Data Administration	
	Read	Create	Edit	Delete	View All i	Modify All i	
Billing Process	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
consumer	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Laptop Bookings	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Total Laptops	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Session Settings

Session Times Out After: [i](#)

Session Security Level Required at Login: [i](#)

Password Policies

ROLES AND HIERARCHY

Creating owner Role

Screenshot of the Salesforce Setup page for Roles:

The URL is pvpsit-1be-dev-ed.lightning.force.com/lightning/setup/Roles/home

Left Sidebar:

- Setup
- Home
- Object Manager
- ROLES
- Users
- Roles
- Feature Settings
- Sales
- Contact Roles on Contracts
- Contact Roles on Opportunities
- Service
- Case Teams
- Case Team Roles
- Contact Roles on Cases

Middle Content Area:

Understanding Roles

Set up your Role Hierarchy to control how your organization reports on and accesses data.

Sample Role Hierarchy: Territory-based Sample

```

graph TD
    CEO[CEO President] --> WesternSalesDir[Western Sales Director]
    CEO --> EasternSalesDir[Eastern Sales Director]
    CEO --> InternationalSalesDir[International Sales Director]
    WesternSalesDir --> WesternSalesRep1[Western Sales Rep]
    WesternSalesDir --> WesternSalesRep2[CA Sales Rep]
    WesternSalesDir --> WesternSalesRep3[OR Sales Rep]
    EasternSalesDir --> EasternSalesRep1[Eastern Sales Rep]
    EasternSalesDir --> EasternSalesRep2[NY Sales Rep]
    EasternSalesDir --> EasternSalesRep3[MA Sales Rep]
    InternationalSalesDir --> InternationalSalesRep1[International Sales Rep]
    InternationalSalesDir --> InternationalSalesRep2[Asian Sales Rep]
    InternationalSalesDir --> InternationalSalesRep3[European Sales Rep]
  
```

Right Side:

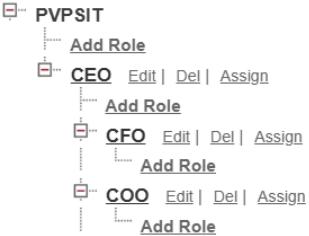
- Help for this Page
- Set Up Roles
- Don't show this page again

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

[Collapse All](#) [Expand All](#)



Role Edit
New Role

Role Edit

Label	<input type="text" value="owner"/>
Role Name	<input type="text" value="owner"/> 
This role reports to	<input type="text" value="CEO"/> 
Role Name as displayed on reports	<input type="text"/>

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

Role Edit
New Role

Role Edit

Label	<input type="text" value="Agent"/>
Role Name	<input type="text" value="Agent"/> 
This role reports to	<input type="text" value="owner"/> 
Role Name as displayed on reports	<input type="text"/>

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

USERS

Create User

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

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

Setup Home Object Manager

Search Setup

Users

All Users

Help for this Page

Action Full Name Alias Username Role Active Profile

Chatter Expert Chatter chatter@0ddm00000fbg5uad.9a5gxtdlyg@chatter.salesforce.com ✓ Chatter Free User

Payan Kumar Jammu JPava payan12144@pvpst.com ✓ System Administrator

User_Integration integ integration@0ddm00000fbg5uad.com ✓ Analytics Cloud Integration User

User_Security sec insjhsssecurity@0ddm00000fbg5uad.com ✓ Analytics Cloud Security User

New User Reset Password(s) Add Multiple Users

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

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

pvpst-1be-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005%2Fe%3FretURL%3D%252F005%253FisUse... | Help for this Page

Setup Home Object Manager

Search Setup

Users

New User

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)

User Edit

General Information

First Name	ram
Last Name	ram
Alias	rram
Email	21501a0567@pvpsit.ac.in
Username	21501a0567@pvpsit.ac.in
Nickname	User173191797399822279
Title	
Company	
Department	
Division	

Role	Agent
User License	Salesforce Platform
Profile	Standard Platform User
Active	<input checked="" type="checkbox"/>
Marketing User	<input type="checkbox"/>
Offline User	<input type="checkbox"/>
Knowledge User	<input type="checkbox"/>
Flow User	<input type="checkbox"/>
Service Cloud User	<input type="checkbox"/>
Site.com Contributor User	<input type="checkbox"/>
Site.com Publisher User	<input type="checkbox"/>
WDC User	<input type="checkbox"/>
Data.com User Type	-None--
Data.com Monthly Addition Limit	Default Limit (300)
Accessibility Mode (Classic Only)	<input type="checkbox"/>
High-Contrast Palette on Charts	<input type="checkbox"/>

FLOWWS

Create a Flow on dell laptop

Configure Start

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

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

None

* 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 any 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

 **Decision** X

***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	OUTCOME DETAILS	Delete Outcome						
1 dell	*Label <input type="text" value="dell"/> *Outcome API Name <input type="text" value="dell"/>	Delete Outcome						
2 acer								
3 hp								
4 mac								
Default Outcome	Condition Requirements to Execute Outcome <input type="button" value="All Conditions Are Met (AND)"/>							
	<table border="1"><tr><td>Resource</td><td>Operator</td><td>Value</td></tr><tr><td>..._Bookings__c > Laptop names</td><td>Equals</td><td>Dell</td></tr></table>	Resource	Operator	Value	..._Bookings__c > Laptop names	Equals	Dell	+ Add Condition
Resource	Operator	Value						
..._Bookings__c > Laptop names	Equals	Dell						
	When to Execute Outcome <input type="radio"/> If the condition requirements are met <input type="radio"/> Only if the record that triggered the flow to run is updated to meet the condition requirements							

Decision

* Label: Field should Update

* API Name: Field_should_Update

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	LAYER	Outcome API Name
	dell core i5	dell_core_i5
⋮ dell core i3		
⋮ dell core i5		
⋮ dell core i7		
Default Outcome		

Condition Requirements to Execute Outcome: All Conditions Are Met (AND)

Resource: ...ptop_Bookings_c > core type, Operator: Equals, Value: Core i5

+ Add Condition

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: Field should Update

* API Name: Field_should_Update

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	LAYER	Outcome API Name
	dell core i7	dell_core_i7
⋮ dell core i3		
⋮ dell core i5		
⋮ dell core i7		
Default Outcome		

Condition Requirements to Execute Outcome: All Conditions Are Met (AND)

Resource: ...ptop_Bookings_c > core type, Operator: Equals, Value: Core i7

+ Add Condition

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

X

* Label

months selected

* API Name i

months_selected

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	OUTCOME DETAILS
dell 1(i3)	Delete Outcome
dell 2(i3)	* Label dell 1(i3) * Outcome API Name <small>i</small> dell_1_i3
dell 3(i3)	Condition Requirements to Execute Outcome All Conditions Are Met (AND)
dell 4(i3)	Resource ...kings_c > how many months Operator Equals Value 1
dell 5(i3)	+ Add Condition
Default Outcome	

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	Operator	Value
...kings_c > how many months	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	OUTCOME DETAILS
dell 1(i3)	Delete Outcome
dell 2(i3)	* Label dell 3(i3) * Outcome API Name <small>i</small> dell_3_i3
dell 3(i3)	Condition Requirements to Execute Outcome All Conditions Are Met (AND)
dell 4(i3)	Resource ...kings_c > how many months Operator Equals Value 3
dell 5(i3)	+ Add Condition
Default Outcome	

OUTCOME ORDER i +

dell 1(i3)	OUTCOME DETAILS	Delete Outcome	
dell 2(i3)	* Label <input type="text" value="dell 4(i3)"/>	* Outcome API Name i <input type="text" value="dell_4_i3"/>	
dell 3(i3)	Condition Requirements to Execute Outcome All Conditions Are Met (AND) ▼		
dell 4(i3)	Resource <input type="text" value="...kings_c > how many months"/> X	Operator <input type="text" value="Equals"/> ▼	Value <input type="text" value="4"/> 🔍 ✖
dell 5(i3)	+ 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 i +

dell 1(i3)	OUTCOME DETAILS	Delete Outcome	
dell 2(i3)	* Label <input type="text" value="dell 5(i3)"/>	* Outcome API Name i <input type="text" value="dell_5_i3"/>	
dell 3(i3)	Condition Requirements to Execute Outcome All Conditions Are Met (AND) ▼		
dell 4(i3)	Resource <input type="text" value="...kings_c > how many months"/> X	Operator <input type="text" value="Equals"/> ▼	Value <input type="text" value="5"/> 🔍 ✖
dell 5(i3)	+ Add Condition		
When to Execute Outcome i			



Update Records

X

* Label

one month of dell i3 rate|

* API Name i

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

Amount_c

Value

1000





Update Records

X

* Label

two month of dell i3 rate

* API Name i

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 i3 rate

* API Name 

four_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

4000



 Add Field



Update Records

X

* Label

five month of dell i3 rate

* API Name ⓘ

five_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

5000



+ Add Field

Dell i5



Update Records

X

* Label

one month of dell i5 rate

* API Name i

one_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

Amount_c

Value

1000



[+ Add Field](#)

Update Records

X

* Label

two month of dell i5 rate

* API Name 

two_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

Amount_c

Value

3000



 Add Field



Update Records

X

* Label

three month of dell i5 rate

* API Name

three_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

Amount_c

Value

5000



[+ Add Field](#)



Update Records

X

* Label

four month of dell i5 rate

* API Name i

four_month_of_dell_i5_rate

Description

T

* 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

five month of dell i5 rate

* API Name i

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

Amount_c

Value

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

X

* Label

two month of dell i7 rate

* API Name 

two_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

4000



 Add Field

Update Records

X

* Label

three month of dell i7 rate

* API Name 

three_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

6000



 Add Field

Update Records

* Label: four month of dell i7 rate

* API Name: 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

X

* 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

Amount_c

Value

10000



[+ Add Field](#)

Acer

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	OUTCOME DETAILS
acer core i3	*Label <input type="text" value="acer core i3"/> *Outcome API Name <input type="text" value="acer_core_i3"/>

Default Outcome

Condition Requirements to Execute Outcome

Resource Operator Value

When to Execute Outcome

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	OUTCOME DETAILS	Delete Outcome
acer 1(i3)	*Label <input type="text" value="acer 1(i3)"/> *Outcome API Name <input type="text" value="acer_1_i3"/>	<input type="button" value="Delete Outcome"/>
acer 2(i3)		
acer 3(i3)		
acer 4(i3)		
acer 5(i3)		

Default Outcome

Condition Requirements to Execute Outcome

Resource Operator Value

When to Execute Outcome

Update Records

* Label: one month of acer i3 rate

* API Name: one_month_of_acer_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	900

+ Add Field

Similarly

 Update Records X

* Label two month of acer i3 rate	* API Name <small>i</small> two_month_of_acer_i3_rate
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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
Amount_c	← 1800 [Delete]

Hp

Decision

* Label	* API Name
Field is Update hp	Field_is_Update_hp

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	OUTCOME DETAILS
hp core i5	* Label: hp core i5 * Outcome API Name: hp_core_i5 Condition Requirements to Execute Outcome: All Conditions Are Met (AND) Resource: ...ptop_BBookings_c > core type Equals Core i5 + Add Condition
Default Outcome	

Decision

* Label	* API Name
months selected hp	months_selected_hp

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	OUTCOME DETAILS	Delete Outcome
hp 1(i5)	* Label: hp 1(i5) * Outcome API Name: hp_1_i5 Condition Requirements to Execute Outcome: All Conditions Are Met (AND) Resource: ...okings_c > how many months Equals 1 + Add Condition	Delete Outcome
hp 2(i5)		
hp 3(i5)		
hp 4(i5)		
hp 5(i5)		
Default Outcome		

Update Records

X

* Label

one month of hp i5 rate

* API Name 

one_month_of_hp_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

Amount_c

Value

1700



 Add Field

similarly

 Update Records X

* Label	* API Name i
two month of hp i5 rate	two_month_of_hp_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	3400	

[+ Add Field](#)

MAC

Decision

*Label: mac field should be updated *API Name: mac_field_should_be_updated

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	OUTCOME DETAILS		
mac laptop	*Label: mac laptop	*Outcome API Name: mac_laptop	
Default Outcome	Condition Requirements to Execute Outcome All Conditions Are Met (AND)		
	Resource: ...ptop_Bookings_c > core type <input type="button" value="Delete"/>	Operator: Equals <input type="button" value="Add Condition"/>	Value: Bionic chip <input type="button" value="Search"/> <input type="button" value="Delete"/>

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: mac months selected *API Name: mac_months_selected

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	OUTCOME DETAILS		
mac bionic chip(1)	*Label: mac bionic chip(1)	*Outcome API Name: mac_bionic_chip_1	Delete Outcome
mac bionic chip(2)			
mac bionic chip(3)			
mac bionic chip(4)			
mac bionic chip(5)			
Default Outcome	Condition Requirements to Execute Outcome All Conditions Are Met (AND)		
	Resource: ...okings_c > how many months <input type="button" value="Delete"/>	Operator: Equals <input type="button" value="Add Condition"/>	Value: 1 <input type="button" value="Search"/> <input type="button" value="Delete"/>

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

Update Records

X

* Label

one month of mac bionic

* API Name 

one_month_of_mac_bionic

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

1700



Similarly

 Update Records X

* Label	* API Name i
two month of mac bionic	two_month_of_mac_bionic

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	3400

[+ Add Field](#) Delete

APEX

Edit Bucket Column

* Field	* Bucket Name	
Amount	types of versions	
Range	Bucket	
<= *	900	* Bucket Name basic
Add ►	> 900 to *	1500
Add ►	> 1,500 to *	10000
Add ►	>	10,000
		* Bucket Name very high

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

Edit Subscription

Settings

Frequency

Daily Weekly Monthly

Time

8:00 am ▾

Attachment

[Attach File](#)

Recipients

⚠ Recipients see the same report data as the person running the report.

To add other recipients to this subscription, make sure the report is saved in a shared folder. [Learn More](#)

Run Report As

Me
 Another Person

 Jammu Pavan Kumar X

Conditions

In addition to subscribing, you can set up conditions on this report. You will be notified when conditions are met. This is optional.

Add conditions to this report

[Cancel](#)

[Save](#)

Add Items

Available Items

Favorites

All 1

Search bar: dash

1 item selected

Selected item: 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)

Add More Items

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

Reset Navigation to Default

Cancel Save

This screenshot shows the 'Edit LAPTOP RENTALS App Navigation Items' dialog. At the top, it says 'Personalize your nav bar for this app. Reorder items, and rename or remove items you've added.' Below that is a message '1 item added to your list. Save your updates.' The main area lists five navigation items: 'Total Laptops', 'consumer', 'Laptop Bookings', 'Billing Process', and 'Dashboards'. The 'Dashboards' item is highlighted with a yellow background. At the bottom are 'Cancel' and 'Save' buttons.

Create folder

* Folder Label

total rent amount

* Folder Unique Name

totalrentamount

Cancel Save

This screenshot shows the 'Create folder' dialog. It has two required fields: 'Folder Label' containing 'total rent amount' and 'Folder Unique Name' containing 'totalrentamount'. At the bottom are 'Cancel' and 'Save' buttons.

New Dashboard

* Name
data analytics of laptops

Description
total amount of data in dashboards

Folder
total rent amount

