




12






Setup



Home



Object Manager

Setup Home

Service Setup Assistant

Commerce Setup Assistant

Multi-Factor Authentication Assistant

Hyperforce Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage


Optimizer

Sales Cloud Everywhere

ADMINISTRATION


> Users

> Data

SETUP

Home


Create



Get Started with Einstein Bots

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


[Get Started](#)



Mobile Publisher

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

[Learn More](#)



Real-time Collaborative Docs

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

[Get Started](#)

Most Recently Used

10 items

NAME	TYPE	OBJECT
------	------	--------

 **Object Manager**
2 items, Sorted by Label

[Schema Builder](#) [Create](#)

Label	API Name	Type	Description	Last Modified	Deployed	
Customer	Customer	Standard Object				
Our Customer	Our_Customer__c	Custom Object		21/09/2024	✓	

Validation Rules

- ☒ Allow Reports
- ☐ Allow Activities
- ☐ Track Field History
- ☐ Allow in Chatter Groups
- ☐ Enable Licensing



Search Setup



Object Manager
1 items, sorted by Label

[Schema Builder](#) [Create](#)

Label	API Name	Type	Description	Last Modified	Deployed	
other	other_c	Custom Object		21/09/2024	✓	



Search Setup



Setup Home Object Manager

Setup > OBJECT MANAGER
other

- 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
- Triggers
- Flow Triggers
- Validation Rules

Edit Custom Object
other

[Help for this Page](#)

Custom Object Definition Edit

Save Save & New Cancel

Custom Object Information

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

Be careful when changing the name or label as it may affect existing integrations and merge templates.

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

Context-Sensitive Help Setting ☒ Open the standard Salesforce.com help & Training window
☐ Open a window using a Visualforce page

Context 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 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

SETUP > OBJECT MANAGER					
Our Customer					
<div>Details</div> <div>Fields & Relationships</div> <div>Page Layouts</div> <div>Lightning Record Pages</div> <div>Buttons, Links, and Actions</div> <div>Compact Layouts</div> <div>Field Sets</div> <div>Object Limits</div> <div>Record Types</div> <div>Related Lookup Filters</div> <div>Search Layouts</div> <div>List View Button Layout</div> <div>Restriction Rules</div> <div>Scoping Rules</div> <div>Triggers</div> <div>Flow Triggers</div> <div>Validation Rules</div>	<div>Fields & Relationships</div> <div>10 Items, Sorted by Field Label</div> <div>Quick Find</div> <div>New</div> <div>Deleted Fields</div> <div>Field Dependencies</div>				
	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
	Additional Information	Additional_Information__c	Text Area(255)		
	Address	Address__c	Text Area(255)		
	Created By	CreatedById	Lookup(User)		
	Customer Id	Customer_Id__c	Auto Number		
	Customer Name	Customer_Name__c	Text(255)		
	Email Id	Email_Id__c	Email		
	Last Modified By	LastModifiedById	Lookup(User)		
	Mobile Number	Mobile_Number__c	Phone		
	Our Customer	Name	Text(80)		✓
	Owner	OwnerId	Lookup(User,Group)		✓

Details	<div>Fields & Relationships</div> <div>13 Items, Sorted by Field Label</div>					<div><div>Q, Quick Find</div><div>NewDeleted FieldsField DependenciesSet History Tracking</div></div>
Fields & Relationships	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED	
Page Layouts	Address	Address__c	Long Text Area(32768)			
Lightning Record Pages	Consultant	Name	Text(80)		✓	
Buttons, Links, and Actions	Created By	CreatedById	Lookup(User)			
Compact Layouts	Customer Details	Customer__c	Lookup(Customer)		✓	
Field Sets	Customer Id	Customer_Id__c	Auto Number			
Object Limits	Customer Name	Customer_Name__c	Text(255)			
Record Types	Delivery Type	Delivery_Type__c	Picklist			
Related Lookup Filters	Email Id	Email_Id__c	Email			
Search Layouts	Last Modified By	LastModifiedById	Lookup(User)			
List View Button Layout	Mobile Number	Mobile_Number__c	Phone			
Restriction Rules	Owner	OwnerId	Lookup(User,Group)		✓	
Scoping Rules	Payment	Payment__c	Picklist			
Triggers	Products	Products__c	Picklist (Multi-Select)			
Flow Triggers						
Validation Rules						

Details


Fields & Relationships

11 items. Sorted by Field Label







Quick Find


NewDeleted FieldsField DependenciesSet History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Customer Details	Customer__c	Master-Detail(Customer)		✓
Customer id	Customer_id__c	Auto Number		
Customer Name	Customer_Name__c	Text(255)		
Delivery Type	Delivery_Type__c	Picklist		
Email id	Email_Id__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Mobile Number	Mobile_Number__c	Phone		
Payment	Payment__c	Picklist		
Products	Products__c	Picklist (Multi-Select)		
Retailers	Name	Text(80)		✓





Search Setup



 Setup


Home



Object Manager 

 SETUP
Object Manager
1 item, Sorted by Label

consultant

Schema Builder

Create 

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED	
Consultant	Consultant__c	Custom Object		21/09/2014		

SETUP > OBJECT MANAGER

Consultant

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

Triggers

Flow Triggers

Validation Rules

Page Layouts

1 Items, Sorted by Page Layout Name

Quick Find

New

Page Layout Assignment

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Consultant Layout	Jaheda Sheikh, 21/09/2024, 11:40 am	Jaheda Sheikh, 21/09/2024, 12:20 pm

Setup

Home

Object Manager

Search Setup

12

SETUP > OBJECT MANAGER

Consultant

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

Triggers

Flow Triggers

Validation Rules

Save

Quick Save

Preview As...

Cancel

Undo

Redo

Layout Properties

Fields

Buttons

Quick Actions

Mobile & Lightning Actions

Expanded Lookups

Related Lists

Report Charts

Quick Find

Field Name

Section

Created By

Delivery Type

Owner

Blank Space

Customer Details

Email Id

Payment

Address

Customer Id

Last Modified By

Products

Consultant

Customer Name

Mobile Number

Edit

Delete

Clone

Change Owner

Change Record Type

Printable View

Sharing

Sharing Hierarchy

Edit Labels

Information (header visible on edit only)

Consultant

Sample Text

Owner

Sample Text

Customer Id

GEN-0004-001234

Customer Name

Sample Text

Mobile Number

1-415-555-1212

Delivery Type

Sample Text

Address

Sample Text

Email Id

sarah.sample@company.com

Products

Sample Text

Payment

Sample Text

Customer Details

Sample Text

System Information (header visible on edit only)

Created By

Sample Text

Last Modified By

Sample Text

Custom Links (header visible on edit only)

Mobile Cards (Salesforce mobile only)

Drag expanded lookups and mobile-enabled Visualforce pages here to display them as mobile cards

Related Lists

Setup

Home

Object Manager

app mana

Apps

App Manager

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

23 Items • Sorted by App Name • Filtered by All app menu items • TabSet Type

	App Name ↑	Developer Name	Description	Last Modified Date	App Type	Visible i...	
1	All Tabs	AllTabSet		19/08/2024 5:12 pm	Classic		
2	Analytics Studio	Insights	Build CRM Analytics dashboards and apps	19/08/2024 5:12 pm	Classic	✓	
3	App Launcher	AppLauncher	App Launcher tabs	19/08/2024 5:12 pm	Classic	✓	
4	Automation	FlowsApp	Automate business processes and repetitive tasks.	19/08/2024 5:14 pm	Lightning	✓	
5	Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	19/08/2024 5:13 pm	Lightning	✓	
6	Community	Community	Salesforce CRM Communities	19/08/2024 5:12 pm	Classic	✓	
7	Content	Content	Salesforce CRM Content	19/08/2024 5:12 pm	Classic	✓	
8	Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	19/08/2024 5:12 pm	Lightning	✓	
9	Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	19/08/2024 5:12 pm	Lightning	✓	
10	Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	19/08/2024 5:12 pm	Lightning	✓	
11	Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	19/08/2024 5:12 pm	Classic	✓	
12	Platform	Platform	The fundamental Lightning Platform	19/08/2024 5:12 pm	Classic		
13	Queue Management	QueueManagement	Create and manage queues for your business.	19/08/2024 5:12 pm	Lightning	✓	
14	Sales	Sales	The world's most popular sales force automation (SFA) solution	19/08/2024 5:12 pm	Classic		
15	Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	19/08/2024 5:12 pm	Lightning	✓	
16	Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple records on one screen	19/08/2024 5:12 pm	Lightning	✓	
17	Salesforce Chatter	Chatter	The Salesforce Chatter social network, including profiles and feeds	19/08/2024 5:12 pm	Classic	✓	
18	Salesforce Scheduler Setup	LightningScheduler	Set up personalized appointment scheduling.	19/08/2024 5:13 pm	Lightning	✓	
19	Service	Service	Manage customer service with accounts, contacts, cases, and more	19/08/2024 5:12 pm	Classic	✓	
20	Service Console	LightningService	(Lightning Experience) Lets support agents work with multiple records across customer service channels on one screen	19/08/2024 5:12 pm	Lightning	✓	
	Site.com	Site.com	Create and manage websites using the drag-and-drop Site.com application, and manage content and published sites.	19/08/2024 5:12 pm	Classic		

Setup

Home

Object Manager

Search Setup

app manager

Apps

App Manager

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

New Lightning App

Navigation Items

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

Create

Type to filter list...

Accounts

All Sites

Alternative Payment Methods

Analytics

App Launcher

Appointment Categories

Appointment Invitations

Approval Requests

Asset Action Sources

Asset Actions

Selected Items

Customers

Consultants

Retailers

others

Reports

Dashboards

Back

Next

18	Salesforce Scheduler Setup	LightningScheduler	Set up personalized appointment scheduling.	19/08/2024 5:12 pm	Lightning	✓
19	Service	Service	Manage customer service with accounts, contacts, cases, and more.	19/08/2024 5:12 pm	Classic	✓
20	Service Console	LightningService	(Lightning Experience) Lets support agents work with multiple records across customer service channels on one screen.	19/08/2024 5:12 pm	Lightning	✓
21	Site.com	Sites	Build pixel-perfect, data-rich websites using the drag-and-drop Site.com application, and manage content and published sites.	19/08/2024 5:12 pm	Classic	✓

SetupHomeObject Manager

New Lightning App

User Profiles

Choose the user profiles that can access this app.

Available Profiles

Type to filter list...

Analytics Cloud Integration User

Analytics Cloud Security User

Authenticated Website

Authenticated Website

B2B Reordering Portal Buyer Profile

Billing Operator

Contract Manager

Custom: Marketing Profile

Custom: Sales Profile

Custom: Customer Profile

Selected Profiles

System Administrator

Back

Save & Finish

18Salesforce Scheduler SetupLightningschedulerSet up personalized appointment scheduling.19/08/2024 5:13 pmLightning✓

19ServiceServiceManage customer service with accounts, contacts, cases, and more.19/08/2024 5:12 pmClassic✓

Setup

Home

Object Manager

Search Setup

Star

Print

Help

Settings

12

Profile

profile

Users

Profiles

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

SETUP

Profiles

Profiles

Hub for this Page

All Profiles

Edit

Delete

Create New View

New Profile

f

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

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

Setup

Home

Object Manager

Search Setup

profile

Users

Profiles

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

SETUP

Profiles

LEADS	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Legal Entities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Locations	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Location Groups	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Location Group Assignments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Managers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Work Plans	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work Plan Templates	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Work Step Templates	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Work Types	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work Type Groups	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Custom Object Permissions

	Basic Access				Custom Administration	
	Read	Create	Edit	Delete	View All	Modify All
Consultants	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
others	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

	Basic Access				Custom Administration	
	Read	Create	Edit	Delete	View All	Modify All
Our Customers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Retailers	<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

Password complexity requirement: Must include alpha and numeric characters

Password question requirement: Cannot contain password

Maximum invalid login attempts: 10


Lockout effective period: 15 minutes

Obscure secret answer for password resets: ☐

Require a minimum 1 day password lifetime: ☐

Don't immediately expire links in forgot password emails: ☐

Save Save & New Cancel



Search Setup

SetupHomeObject Manager

roles

Users

Roles

Feature Settings

Sales

Service

Case Teams

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

Roles

Role Edit

Store Head

Role Edit

Label

Store Head

Role Name

Store Head

This role reports to


CEO

Role Name as displayed on reports

Save

Save & New

Cancel



SETUP

Users

Extension

Fax

Mobile

Email Encoding

Unicode (UTF-8)

Employee Number

Individual

Example: +1 5035550123

Mailing Address

Street

City

Zip/Postal Code

State/Province

Country

Single Sign On Information

Federation ID

Locale Settings

Time Zone

(GMT+05:30) India Standard Time (Asia/Kolkata)

Locale

English (India)

Language

English

Approver Settings

Delegated Approver

Manager

Receive Approval Request Emails

Only if I am an approver

☒ Generate new password and notify user immediately

Save

Save & New

Cancel

Setup

Home

Object Manager

users

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Search Setup

SETUP

Users

New User

User Edit

SaveSave & NewCancel

General Information

First Name

John

Last Name

Teddy

Alias

tedd

Email

tabu3229@gmail.com

Username

tabu3229

Id

User172708817549010478

Title

Company

Department

Division

Role

Billing Operator

User License

Salesforce Platform

Profile

Billing Operator

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)

☐

High-Contrast Palette on Charts

☐

Load Lightning Pages While Scrolling

☒

Debug Mode

☐

Quick Access Menu

☒

Salesforce CRM Content User

☒

Receive Salesforce CRM Content Email Alerts

☒

Receive Salesforce CRM Content Alerts as Daily Digest

☒

Allow Forecasting

☐

No MRU Updates

☐

Q users

- Users
 - Permission Set Groups
 - Permission Sets
 - Profiles
 - Public Groups
 - Queues
 - Roles
 - User Management Settings
- Users
- Feature Settings
 - Data.com
 - Prospector Users

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

SETUP

Users

Extension

Fax

Mobile

Example: +1 5020500123

Email Encoding

Unicode (UTF-8)

Employee Number

Individual

Mailing Address

Street

City

Zip/Postal Code

State/Province

Country

India

Single Sign On Information

Federation ID

Locale Settings

Time Zone

(GMT+05:30) India Standard Time (Asia/Kolkata)

Locale

English (India)

Language

English

Approver Settings

Delegated Approver

Manager

Receive Approval Request Emails

Only if I am an approver

☒ Generate new password and notify user immediately

Save

Save & New

Cancel

Navigation Items

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

Search

our

Asset Action Sources

Operating Hours

Service Resources

Web Store Inventory Sources

Create

Create

Selected Items

Retailers

others

Reports

Dashboards

Our Customers



Our Customer
Saida

Related

Details

Our Customer

Saida



Customer id

1

Customer Name

saida Sheik



Mobile Number

8956432109



Email Id



Address



Additional Information



Created By

Jaheda Sheik, 23/09/2024, 3:51 pm

Owner

Jaheda Sheik



Last Modified By

Jaheda Sheik, 23/09/2024, 3:51 pm

New Our Customer

* = Required Information

Information

* Our Customer



kubra

Owner



Jaheda Sheik

Customer id

Customer Name



kubra

Mobile Number



8754954323

Email id

Address

Additional Information

Cancel

Save & New

Save



Our Customers
Recently Viewed ▾

[New](#) [Import](#) [Change Owner](#) [Assign Label](#)

2 items • Updated a few seconds ago

	<input type="checkbox"/> Our Customer	
1	<input type="checkbox"/> Iskra	
2	<input type="checkbox"/> Saida	

Our Customers
Recently Viewed

New Import Change Owner Assign Label

2 Items • Updated a few seconds ago

Search this list...


	Our Customer	
1	Rubra	
2	Saida	

×

Delete Our Customer







Are you sure you want to delete this Our Customer?


CancelDelete





Urban Color

Retailers ▾others ▾Reports ▾Dashboards ▾Our Customers ▾



Our Customers

Recently Viewed




1 item • Updated a few seconds ago

☐ Our Customer







1

☐ kubra

Our Customer "Saida" was deleted. [Undo](#)



NewImportChange OwnerAssign Label





Data Import Wizard

Help for this page

Recent Import Jobs

Status	Object	Records Created	Records Updated	Records Failed	Start Date	Processing Time (ms)
--------	--------	-----------------	-----------------	----------------	------------	----------------------

Bulk Api Monitoring



Before you import
your data...

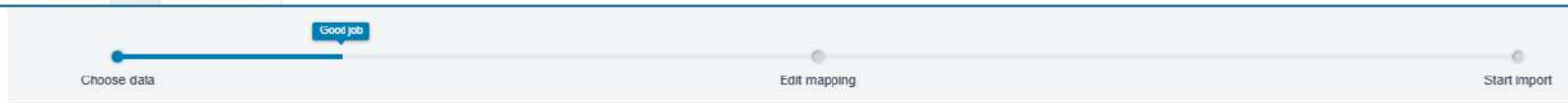
- Collapse
- Clean up your data import file**
You'll have fewer errors to resolve if your data file is clean and free of duplicates. [Watch video](#)
- Make sure your field names match Salesforce field names**
You'll be required to map your data fields to Salesforce data fields. Data in unmapped fields is not imported. [View a list of Salesforce data fields](#)
- Don't import too many records at once**
Using the Data Import Wizard, import up to 50,000 records at a time. Importing too many records can slow down your org for all users, especially during periods of peak usage.

Import your data in 3 easy steps!

Launch the Data Import Wizard to import your data.



Launch Wizard!



Import your Data into Salesforce

You can import up to 50,000 records at a time.

[Help for this page](#)

What kind of data are you importing?

Standard objects	Custom objects	
Consultants		✓
Our Customers		>
Retailers		>
others		>

What do you want to do?

Add new records	>
Update existing records	>
Add new and update existing records	>

Where is your data located?

Import your Data into Salesforce

You can import up to 50,000 records at a time.

[Help for this page](#)

What kind of data are you importing?

Standard objects

Custom objects

Consultants	✓
Our Customers	>
Retailers	>
others	>

What do you want to do?

Add new records

✓

Match by:

--None--

Which User field in your file designates record owners?

--None--

Which Customer field in your file do you want to match against to set the Customer Details lookup field?

--None--

Trigger workflow rules and processes?

☐ Trigger workflow rules and processes for new and updated records

Update existing records

>

Add new and update existing records

>

Where is your data located?

Drag CSV file here to upload

CSV

File

Choose File

Consultant_CSV.csv

✓

Character Code

ISO-8859-1 (General US & Western European, ISO-LATIN-1)

Values Separated By

Comma



Edit Field Mapping: Consultants

Your file has been auto-mapped to existing Salesforce fields, but you can edit the mappings if you wish. Unmapped fields will not be imported.

[Help for this page](#)

Edit	Mapped Salesforce Object	CSV Header
Change	Customer Name	Customer Name
Change	Mobile Number	Mobile Number
Change	Email Id	Email Id
Change	Delivery Type	Delivery Type
Change	Payment	Payment
Change	Address	Address

Choose data

Edit mapping

Create job

Start import

Review & Start Import

Review your import information and click Start Import.

[Help for this page](#)

Your selections:

Consultants ✓

Add new records ✓

Consultant_CSV.csv ✓

Your import will include:

Mapped fields

6

Your import will not include:

Unmapped fields

0

Edit mapping

Congratulations, your import has started!
Click OK to view your import status on the Bulk Data Load Job page.

OK

import will include:

mapped fields

6

your import will not include:

Unmapped fields

0

Bulk Data Load Job

750NS000002Hqp5

[Help for this Page](#)

View the details of a bulk data load job.

[» Back to List: Bulk Data Load Jobs](#)

Bulk Data Load Job Detail				Reload	
Job ID	750NS000002Hqp5	Job Type	Bulk V1	Status	Closed
Submitted By	Jaheda Sheik	Operation	Insert	Total Processing Time (ms)	0
Start Time	23/09/2024, 4:21 pm IST	Queued Batches	0	API Active Processing Time (ms)	0
End Time	23/09/2024, 4:21 pm IST	In Progress Batches	0	Apex Processing Time (ms)	0
Time to Complete (hh:mm:ss)	00:00	Completed Batches	0		
Object	Consultant	Failed Batches	0		
External ID Field		Progress			
Content Type	CSV	Records Processed			
Concurrency Mode	Parallel	Records Failed			
API Version	61.0	Retries	0		
				Reload	






Edit Bucket Column

* Field

Payment ✕

* Bucket Name

Payment type

All Values (4)		Search Values 🔍	
 netbanking (3) ✎ 🗑	<input type="checkbox"/>	VALUE	BUCKET ▲
 cash (1) ✎ 🗑	<input type="checkbox"/>	1)Debit Card	 netbanking
Unbucketed Values (0)	<input type="checkbox"/>	2)Credit Card	 netbanking
	<input type="checkbox"/>	3)UPI	 netbanking
<input type="checkbox"/> Bucket remaining values as Other			

Add Bucket

Move To ▼

Edit Bucket Column

* Field

Payment



* Bucket Name

Payment type

All Values (4)

Search Values



netbanking (3)



VALUE

BUCKET



cash (1)



4)Cash

cash

Unbucketed Values (0)

☐ Bucket remaining values as Other

Add Bucket

Move To



Cancel

Apply

Urban Color

Retailers

others

Reports

Dashboards

Our Customers

Search...

12

Reports

Recent

1 item

Search recent reports...

New Report

New Folder

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Consultant report		Private Reports	Jahoda Shaik	23/9/2024, 4:59 pm	

REPORTS

Recent

Created by Me

Private Reports

Public Reports

All Reports

FOLDERS

All Folders

Created by Me

Shared with Me

FAVORITES

All Favorites




Urban Color Retailers ▾ others ▾ Reports ▾ Dashboards ▾ Our Customers ▾ Consultants ▾

Search...



Reports
Recent
1 item

Search recent reports... [New Report](#) [New folder](#) ⚙



Urban Color

Retailers

others

Reports

Dashboards

Our Customers

Consultants

REPORT

Consultant report

Consultants

Fields

Outline

Filters

Groups

GROUP ROWS

Add group...

payment type

GROUP COLUMNS

Add group...

Columns

Add column...

Delivery Type

Products

Payment

Consultant: Consultant

Previewing a limited number of records. Run the report to see everything.

payment type	Delivery Type	Products	Payment	Consultant: Consultant
net banking (4)	1)self Pickup	2)Compact; 3)Eye Liner; 5)Lip Balm	2)Credit Card	jaheda
	2)courier	1)Lipstick; 4)Face Pack	2)Credit Card	kubra
	2)courier	1)Lipstick; 5)Lip Balm	3)UPI	Tabu
		2)Compact; 4)Face Pack	3)UPI	Saida
Subtotal				
cash (2)	2)courier	3)Eye Liner; 4)Face Pack	4)Cash	dilshad
	1)self Pickup	4)Face Pack	4)Cash	rafi
Subtotal				
Total (6)				

Remove Column: payment type

Urban Color

Retailers

others

Reports

Dashboards

Our Customers

Consultants

Search...

★

+

🔍

?

⚙️

🔔

👤

REPORT

Consultant report

Consultants

↶

↷

Add Chart

Save & Run

Save

Close

Run

Update Preview Automatically

Fields

Outline

Filters

Groups

GROUP ROWS

Add group...

payment type

GROUP COLUMNS

Add group...

Columns

Add column...

Delivery Type

Products

Payment

Consultant Consultant

Previewing a limited number of records. Run the report to see everything.

payment type	Delivery Type	Products	Payment	Consultant Consultant
net banking (4)	1)Self Pickup	2)Compact; 3)Eye Liner; 5)Up Balm	2)Credit Card	jaheda
	2)courier	1)Lipstick; 4)Face Pack	2)Credit Card	hobna
	2)courier	1)Lipstick; 5)Up Balm	3)UPI	tohu
	-	2)Compact; 4)Face Pack	3)UPI	Saida
Subtotal				
cash (1)	2)courier	3)Eye Liner; 4)Face Pack	4)Cash	olshad
Subtotal				
Total (5)				



REPORT

Consultant report Consultants

Fields >

Outline Filters

Groups

GROUP ROWS

Add group...

payment type

GROUP COLUMNS

Add group...

Columns

Add column...

Delivery Type


Products

Payment

Consultant: Consultant

Previewing a limited number of records. Run the report to see everything.

payment type	Delivery Type	Products	Payment	Consultant: Consultant
net banking (4)	1)self Pickup	2)Compact; 3)Eye Liner; 5)Lip Balm	2)Credit Card	jaheda
	2)courier	1)Lipstick; 4)Face Pack	2)Credit Card	kubra
	2)courier	1)Lipstick; 5)Lip Balm	3)UPI	Tabu
	-	2)Compact; 4)Face Pack	3)UPI	Saida
Subtotal				
cash (1)	2)courier	3)Eye Liner; 4)Face Pack	4)Cash	dilshad
Subtotal				
Total (5)				



Retailers ▾others ▾Reports ▾Dashboards ▾Our Customers ▾Consultants ▾

Q Search...

★ ▾

+


📁

?

⚙️

12

🔔



Reports

Recent

1 item

Q Search recent reports...

New ReportNew Folder🔖 ▾

REPORTS	Report Name ▾	Description ▾	Folder ▾	Created By ▾	Created On ▾	Subscribed
Recent	Consultant report		Private Reports	Jahada Shaik	23/9/2024 4:59 pm	🗲
Created by Me						
Private Reports						
Public Reports						
All Reports						
FOLDERS						
All Folders						
Created by Me						
Shared with Me						
FAVORITES						
All Favorites						

Add Widget

Custom Link

Max Values Displayed

6

Title

Consultant report

Subtitle

Footer

Legend Position

Right

Widget Theme



Light (Dashboard default)



Dark



Preview

Consultant report



View Report (Consultant report)

Cancel

Add



Save As

* Name

Consultant Dashboard

Description

Folder

Private Dashboards

Select Folder

Cancel

Create

Dashboard:


Recent


1 item

Q Search recent dashboards...

New Dashboard

New Folder



DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	Consultant Dashboard		Private Dashboards	Jaheda Sheikh	23/9/2024 5:00 pm	
Created by Me						
Private Dashboards						
All Dashboards						
FOLDERS						
All Folders						
Created by Me						
Shared with Me						
FAVORITES						
All Favorites						

Select Report

Reports

Recent

Created by Me

Private Reports

Public Reports

All Reports

Folders

Created by Me

Shared with Me

All Folders

Select Report

Search Reports and Folders...


Reports and Folders

Consultant report

Jaheda Sheikh · 23 Sept 2024, 5:13 pm · [Private Reports](#)

Cancel

Select



Search Setup

SetupHomeObject Manager

App Launcher

ur

Apps

Urban Color

Items

Asset Action Sources

Data Use Purpose

Operating Hours

Our Customers

Return Orders

View More

Get Started with Einstein Bots

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

Get Started

Mobile Publisher

Use the Mobile Publisher to create your own brand.

Learn More

ADMINISTRATION

Users

Data

Email

Most Recently Used

10 items

Urban Color

Retailers

others

Reports

Dashboards

Our Customers

Consultants

Search...

Dashboards

Recent

2 items

Search recent dashboards...

New Dashboard

New Folder

DASHBOARDS

Recent

Created by Me

Private Dashboards

All Dashboards

FOLDERS

All Folders

Created by Me

Shared with Me

FAVORITES

All Favorites

DASHBOARD NAME	DESCRIPTION	FOLDER	CREATED BY	CREATED ON	SUBSCRIBED
Consultant Dashboard		Private Dashboards	Jaheda Sheikh	23/9/2024, 5:00 pm	