

SFDC Customize

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1. 언어 설정 방법

(아래 모든 setup 자료는 영문 기준으로 되어 있습니다. 영문으로 변환 후 셋업을 시작해주세요)

프로필 아이콘 버튼(View profile)→설정(Setting)→언어 및 표준 시간대(Language & Time zone) → 언어 변경 (영어 변환 클릭) → 저장

The top screenshot shows the Salesforce home page with a chart and a sidebar menu. A red box highlights the user profile icon in the top right corner. The bottom screenshot shows the '언어 및 표준 시간대' (Language & Time zone) setup page. A red box highlights the '언어' dropdown menu where '한국어' (Korean) is selected. Both screenshots show the standard Salesforce navigation bar at the top.

2. Company information(회사 정보 변경)

a.회사 이름(Organization Name) b.주소 설정 c. 통화 설정(Currency Locale)

Setup→Home Tab →Search 박스에서 Company information 입력 및 클릭 → Organization Detail 화면에서 Edit 클릭

The screenshot shows the Salesforce home page with a chart. On the right, the 'Organization Detail' page is open, showing the 'Assistant' section with a list of recent lead assignments. A red box highlights the 'Edit' button in the top right corner of the detail page. The standard Salesforce navigation bar is visible at the top.

Organization Detail

Organization Name	Salesforce	Phone
Primary Contact	Yunhee Kim	Fax
Division	KR	Default Locale
Address	KR	Default Language
Fiscal Year Starts In	January	Default Time Zone
Activate Multiple Currencies	<input type="checkbox"/>	Improve DATEVALUE() accuracy for DST
Newsletter	<input type="checkbox"/>	Currency Locale
Admin Newsletter	<input checked="" type="checkbox"/>	Used Data Space
Hide Notices About System Maintenance	<input type="checkbox"/>	Used File Space
Hide Notices About System Downtime	<input type="checkbox"/>	Salesforce.com Organization ID: 00D5g00000EJETT

Created By: Kim Yunhee, 2021. 10. 2. AM 4:30 Modified By: Kim Yunhee, 2021. 10. 2. AM 7:23

User Licenses

Name	Status	Total Licenses	Used Licenses	Remaining Licenses	Expiration Date
Salesforce	Active	5	1	4	2021. 11. 1.
Chatter Free	Active	5,000	0	5,000	2021. 11. 1.
Identity	Active	100	0	100	2021. 11. 1.

General Information

Organization Name	Salesforce
Primary Contact	Yunhee Kim
Division	

Address

State/Province	
City	
Street	
Zip/Postal Code	
Country	KR

Locale Settings

Default Locale	Korean
Default Language	English
Default Time Zone	(GMT+09:00) Korean Standard Time (Asia/Seoul)

Setup Home Object Manager

Company Information

Default Time Zone: (GMT+09:00) Korean Standard Time (Asia/Seoul)

Currency Settings

Currency Locale: Korean (South Korea) - KRW

Warning: Enabling this preference can increase the compiled size of existing formulas that contain the DATEVALUE() function. Before enabling this preference in production, use the formula editor in a sandbox to make sure that formulas that contain the DATEVALUE() function still compile to fewer than 5,000 characters.

Activate Multiple Currencies

Salesforce Newsletter Settings

Users receive the Salesforce newsletter Users receive the Salesforce admin newsletter

Login Notifications

Hide Notices About System Maintenance Hide Notices About System Downtime

Buttons: Save, Cancel

c. 통화 설정 입력

3. 회사의 회계연도 변경

Setup → Company information → Fiscal Year → **Standard Fiscal year** 클릭 (양력) → Fiscal year Start month(회사 회계연도 설정) → Fiscal Year is Based On(회계연도가 1 월부터 시작하면 항상 The ending month, 2-12 월 사이인 경우 The starting month 로 지정) → Save

Setup Home Object Manager

Quick Find

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Release Updates

New Salesforce Mobile App QuickStart

Lightning Usage

Optimizer

Manage Subscription

ADMINISTRATION

> Users

> Data

> Email

PLATFORM TOOLS

SETUP Home

Mobile Publisher

Real-time Collaborative Docs

Join the Trailblazer Community

Setup

Your Account

Add products and licenses

Developer Console

Setup

Fiscal Year Information
Your organization can change the fiscal year start month, and specify whether the fiscal year name is set to the starting or ending year. For example, if your fiscal year starts in April 2021 and ends in March 2022, your Fiscal Year setting can be either 2021 or 2022.

Change Fiscal Year Period

Name	Salesforce
Fiscal Year Start Month	January
Fiscal Year Is Based On	<input checked="" type="radio"/> The ending month <input type="radio"/> The starting month

**회계연도가 1 월부터 시작하면 항상 The ending Month.
2-12 월 사이인 경우 The starting Month로 지정.**

4. Setup 화면에서 Sales 홈 화면으로 다시 돌아가는 방법

정사각형 박스 → Sales 클릭

The Sales home page displays the following information:

- Quarterly Performance:** Shows closed deals at \$69,000, open deals at \$184,500, and a goal of \$250,000.
- Line Chart:** A line graph showing revenue over time from October to December. The Y-axis ranges from 0 to 240k. The legend indicates: Closed (orange), Goal (green), and Closed + Open (>70%) (blue).
- Assistant Sidebar:** Lists recent activity notifications.

5. Object, Record, Field 라는 기본 개념

Object 데이터 값을 저장하고 있는 하나의 장소

Record: Opportunities라는 Object 밑에 있는 각각의 데이터 값

Field: 항목
Type, Lead source, Stage 등등

Opportunity Name	Account Name	Amount	Close Date	Stage	Pro%	Type	Lead Source	Owner F...
1 Acme - 1100 Widgets (Sample)	Acme (Sample)	₩105,000	2021. 9. 23.	Closed Won	100...	New Business	Trade Show	Kim Yunhee
2 Acme - 1,200 Widgets (Sampl...	Acme (Sample)	₩110,000	2021. 10. 27.	Needs Analysis	35%	Existing Business	Trade Show	Kim Yunhee
3 Acme - 120 Widgets (Sample)	Acme (Sample)	₩4,000	2021. 10. 24.	Closed Won	100...	Existing Business	Advertisement	Kim Yunhee
4 Acme - 1250 Widgets (Sample)	Acme (Sample)	₩45,000	2021. 10. 5.	Qualification	10%	Existing Business	Website	Kim Yunhee
5 Acme - 130 Widgets (Sample)	Acme (Sample)	₩13,000	2020. 10. 13.	Closed Lost	0%	New Business	Employee Refer...	Kim Yunhee
6 Acme - 140 Widgets (Sample)	Acme (Sample)	₩22,500	2021. 12. 8.	Negotiation	90%	Existing Business	Purchased List	Kim Yunhee
7 Acme - 150 Widgets (Sample)	Acme (Sample)	₩20,000	2021. 10. 19.	Qualification	10%	Existing Business	Employee Refer...	Kim Yunhee
8 Acme - 170 Widgets (Sample)	Acme (Sample)	₩17,000	2021. 12. 21.	Negotiation	90%	New Business	Trade Show	Kim Yunhee

5-a. Object

(Account, Contacts, Leads, Opportunities 등)

Account: 회사 정보들 (상호명, 매출, 주소 등등)
Contact: 회사 내의 담당자 정보들
Lead: 잠재 고객
 (아직 정식 고객은 아니지만 향후 고객이 될 수 있는 사람들) / 잠재 고객이 본격적으로 영업과 미팅을 진행하거나, 본격적인 세일즈 활동이 이루어지게 되면 잠재고객에서 영업 기회로 전환을 시킴
Opportunity: 영업기회 (잠재고객에서 본격적인 영업 관리 고객으로 넘어온 사람들)
Case: 고객 문의사항 (기존 혹은 신규 고객에 대한 문의사항)
Campaign: 마케팅 캠페인 (세미나, 웹 광고, 박람회, 프로모션 이메일 등)

Standard Objects(세일즈 포스에서 제공하는 표준 Objects) / 물론 Customize Objects 도 만들수 있음

Account: 회사 정보들 (상호명, 매출, 주소 등등)

Contact: 회사 내의 담당자 정보들

Lead: 잠재 고객

(아직 정식 고객은 아니지만 향후 고객이 될 수 있는 사람들) / 잠재 고객이 본격적으로 영업과 미팅을 진행하거나, 본격적인 세일즈 활동이 이루어지게 되면 잠재고객에서 영업 기회로 전환을 시킴

Opportunity: 영업기회 (잠재고객에서 본격적인 영업 관리 고객으로 넘어온 사람들)

Case: 고객 문의사항 (기존 혹은 신규 고객에 대한 문의사항)

Campaign: 마케팅 캠페인 (세미나, 웹 광고, 박람회, 프로모션 이메일 등)

Objects의 관계 (부모와 자식 관계)

Campaign(마케팅 캠페인)

→ Lead (마케팅 캠페인을 기반으로 유입된 잠재고객)

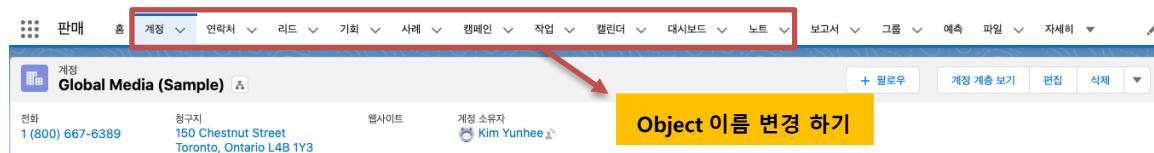
Account(고객 회사)

→ Contact(담당자 연락처), Opportunity(영업기회-진행중인 프로젝트), Case(고객 문의)

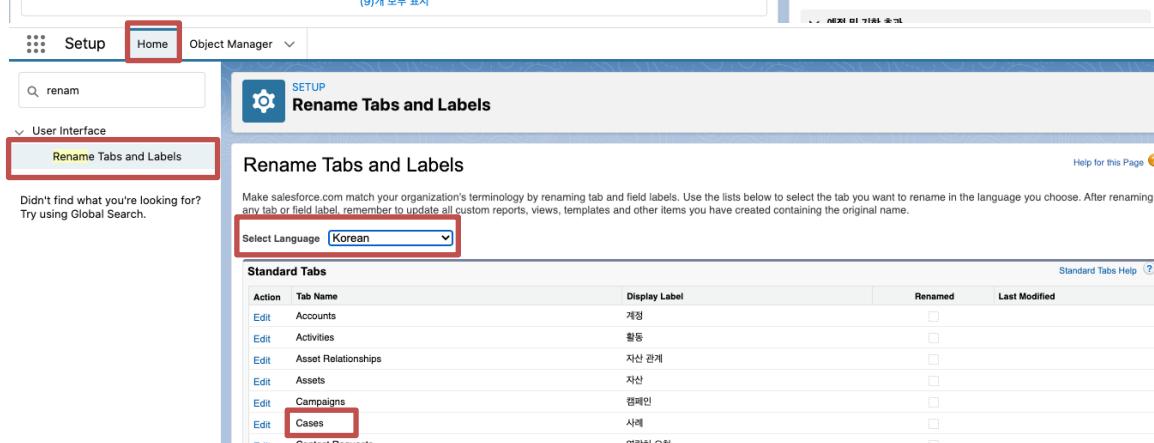
6. Object 항목 이름 변경

Standard Field Label 변경

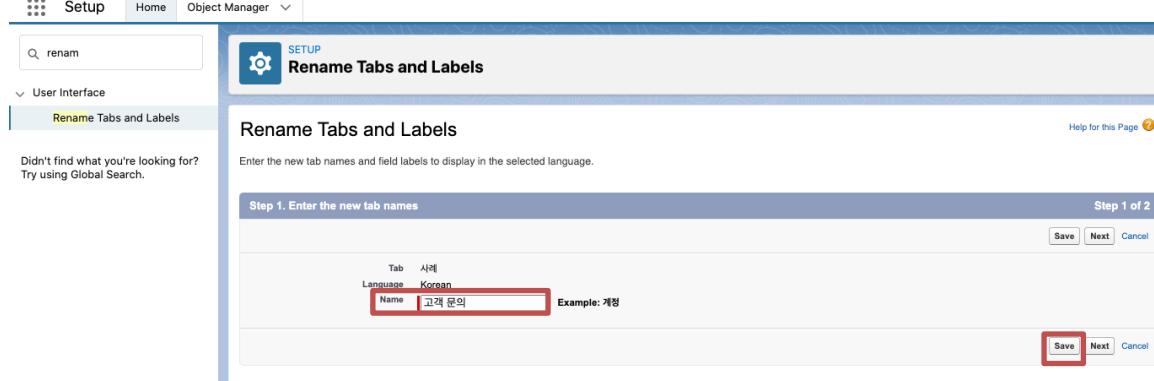
Setup → Home → Rename Tabs and Labels(탭 및 레이블 이름 변경) → Select Language: Korean → 변경하고 싶은 Label Edit → 명칭 변경 → Save



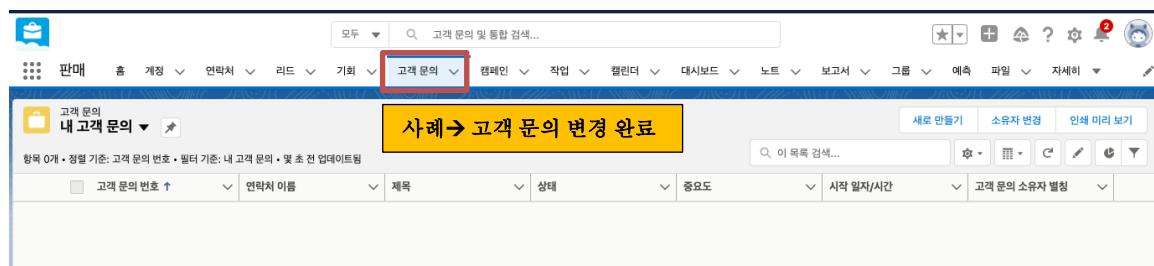
The screenshot shows the Salesforce Home page for the 'Global Media (Sample)' account. A yellow box highlights the 'Object 이름 변경 하기' button in the top right corner. A red arrow points from the previous step's screenshot to this button.



The screenshot shows the 'Rename Tabs and Labels' setup page under the 'User Interface' section. The 'Select Language' dropdown is set to 'Korean'. The 'Cases' tab is selected in the list of standard tabs. A red box highlights the 'Cases' tab in the list.



The screenshot shows the 'Step 1. Enter the new tab names' page. The 'Tab' dropdown is set to '사례' and the 'Language' dropdown is set to 'Korean'. The 'Name' field contains '고객 문의'. A red box highlights the 'Name' field.



The screenshot shows the Salesforce Home page with the 'Customer Inquiry' label applied to the 'Cases' tab. A red box highlights the 'Customer Inquiry' label in the top navigation bar.

7. Object 안에 있는 세부항목 변경

Field 값 항목들 변경 방법

(Standard Field 란 세일즈포스에서 제공하는 기본 항목: 영구적인 삭제 불가, 수정은 가능, 화면에서 보이지 않게 설정은 가능)

Account
Global Media

Phone
1 (800) 667-6389

Related Details

* Account Name

Type

--None--

- Analyst
- Competitor
- Customer
- Integrator
- Investor
- Partner
- Press
- Prospect

Analyst

Parent Account

Search Accounts...

Account Owner Kim Yunhee

Account Object 내에 있는 기존 항목들 변경하기
예시: Type 안에 있는 Picklist 변경하기
(투자자, 파트너사, 분석가 추가 해보기)

Setup → Object Manager → Label 란에서 변경하고 싶은 Object 선택 (예시: Account)

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Account	Account	Standard Object			
Account Contact Relationship	AccountContactRelation	Standard Object			
Activity	Activity	Standard Object			
Asset	Asset	Standard Object			
Asset Relationship	AssetRelationship	Standard Object			
Campaign	Campaign	Standard Object			
Campaign Influence	CampaignInfluence	Standard Object			
Campaign Member	CampaignMember	Standard Object			
Case	Case	Standard Object			
Contact	Contact	Standard Object			

선택한 Object(예시:Account) → Field and relationship 클릭(필드 및 관계) → 변경을 원하는 항목값 선택(예시:Type)

Setup | Home | Object Manager

Account

Fields & Relationships

Field Label	Type	Description
Last Modified By	Lookup	User
Ownership	Picklist	
Parent Account	Hierarchy	
Phone	Phone	
Rating	Picklist	
Shipping Address	Address	
SIC Code	Text	(20)
SIC Description	Text	(80)
Ticker Symbol	Content	(20)
Type	Picklist	

항목값 선택(예시:Type) → Account Type Picklist Values → 기존 불필요한 Picklist Deactivate, New로 신규 생성

Setup | Home | Object Manager

Account

Fields & Relationships

Validation Rules

No validation rules defined.

Account Type Picklist Values

Action	Values	API Name	Default	Chart Colors	Modified By
Edit Delete	Deactivate	Analyst	Analyst	Assigned dynamically	Kim Yunhee, 2021. 10. 2. AM 4:30
Edit Delete	Deactivate	Competitor	Competitor	Assigned dynamically	Kim Yunhee, 2021. 10. 2. AM 4:30
Edit Delete	Deactivate	Customer	Customer	Assigned dynamically	Kim Yunhee, 2021. 10. 2. AM 4:30
Edit Delete	Deactivate	Integrator	Integrator	Assigned dynamically	Kim Yunhee, 2021. 10. 2. AM 4:30
Edit Delete	Deactivate	Investor	Investor	Assigned dynamically	Kim Yunhee, 2021. 10. 2. AM 4:30
Edit Delete	Deactivate	Partner	Partner	Assigned dynamically	Kim Yunhee, 2021. 10. 2. AM 4:30
Edit Delete	Deactivate	Press	Press	Assigned dynamically	Kim Yunhee, 2021. 10. 2. AM 4:30
Edit Delete	Deactivate	Prospect	Prospect	Assigned dynamically	Kim Yunhee, 2021. 10. 2. AM 4:30
Edit Delete	Deactivate	Reseller	Reseller	Assigned dynamically	Kim Yunhee, 2021. 10. 2. AM 4:30
Edit Delete	Deactivate	Other	Other	Assigned dynamically	Kim Yunhee, 2021. 10. 2. AM 4:30

필요한 항목 기재 → Save

Setup | Home | Object Manager

Account

Fields & Relationships

Add Picklist Values

Account Type

Add one or more picklist values below. Each value should be on its own line and it is used for both a value's label and API name.

If a value matches an inactive value's API name, that value is reactivated with its previous label.

If a value matches an inactive value's label but not the API name, a new value is created.

나열하지 말고 단어당 Enter 쳐서 입력

Save | Cancel

Field Dependencies

No dependencies defined.

Validation Rules

No validation rules defined.

Account Type Picklist Values

Action	Values	API Name	Def.	Reorder	Created By	Created Date
Edit Del Deactivate	Investor	Investor			Assigned dynamically	Kim Yunhee, 2021. 10. 2. AM 4:30
Edit Del Deactivate	Press	Press			Assigned dynamically	Kim Yunhee, 2021. 10. 2. AM 4:30
Edit Del Deactivate	Prospect	Prospect			Assigned dynamically	Kim Yunhee, 2021. 10. 2. AM 4:30
Edit Del Deactivate	Reseller	Reseller			Assigned dynamically	Kim Yunhee, 2021. 10. 2. AM 4:30
Edit Del Deactivate	Other	Other			Assigned dynamically	Kim Yunhee, 2021. 10. 2. AM 10:04
Edit Del Deactivate	투자자	TuzaJa			Assigned dynamically	Kim Yunhee, 2021. 10. 2. AM 10:04
Edit Del Deactivate	파트너사	PartnerSa			Assigned dynamically	Kim Yunhee, 2021. 10. 2. AM 10:04
Edit Del Deactivate	분석가	AnalystGa			Assigned dynamically	Kim Yunhee, 2021. 10. 2. AM 10:04

Home 페이지에서 확인 → 항목 변경 완료

Sales Home Accounts Contacts Leads Opportunities Cases Campaigns Tasks

Account Global Media (Sample)

Related Details News

* Account Name: Global Media (Sample)

Type: **Prospect** (Investor, Press, Prospect, Reseller, Other, 투자자, 파트너사, 분석가)

Website: 150 Chestnut Street, Toronto, Ontario L4B 1Y3, Canada

Description: GBM is the worldwide leader in technology news and information on the Web and the producer of the longest-running and farthest-reaching television shows about technology. GBM's network of sites combines breakthrough interactive technology with engaging content and design and is consistently ranked as the Internet's leading content network in

Account Owner: Kim Yunhee

Parent Account: Search Accounts...

Phone: 1 (800) 667-6389

Industry: Media

Employee: [Redacted]

Stage: [Redacted]

8. Object 항목 아래 신규 필드값 생성하는 방법

위의 내용이 기존에 있는 항목을 변경하는 것이었다면 이번에는 신규 항목을 생성해보기

Sales Home Accounts Contacts Leads Opportunities Cases Campaigns Tasks

Account Global Media (Sample)

Website: 150 Chestnut Street, Toronto, Ontario L4B 1Y3, Canada

Account Owner: Kim Yunhee

Parent Account: [Redacted]

Phone: 1 (800) 667-6389

Industry: Media

Year Founded: [Redacted]

Related Details News

Account Name: Global Media (Sample)

Type: 파트너사

Website: 150 Chestnut Street, Toronto, Ontario L4B 1Y3, Canada

Description: GBM is the worldwide leader in technology news and information on the Web and the producer of the longest-running and farthest-reaching television shows about technology. GBM's network of sites combines breakthrough interactive technology with engaging content and design and is consistently ranked as the Internet's leading content network in

Setup → Object manager → Account(계정) → Fields & Relationships(필드 및 관계) → 이번에는 New 클릭

The screenshot shows the Salesforce Object Manager interface for the Account object. On the left, there's a sidebar with various setup options like Details, Fields & Relationships, Page Layouts, etc. The main area is titled 'Fields & Relationships' and lists 24 items, sorted by Field Label. At the top right of this list, there are buttons for 'Quick Find', 'Deleted Fields', 'Field Dependencies', and 'Set History Tracking'. The 'New' button is highlighted with a red box.

New 클릭 하면 선택할 수 있는 항목이 나옴 → 설립연도를 만들고 싶기 때문에 Date 선택 → Next

This screenshot shows the 'Create New Field' wizard, Step 1: Select Type. The 'Fields & Relationships' section is selected in the sidebar. The main area displays a list of field types with their descriptions. The 'Date' type is highlighted with a red box. At the bottom right, there are 'Next Step' and 'Cancel' buttons, with 'Next Step' also highlighted with a red box.

Field Label란에 항목 이름 기재(ex/설립 연도) → Field Name은 반드시 영어로만 입력, 띄어쓰기 사이에는 _ 밑줄 표시

Account
New Custom Field

Step 2. Enter the details Step 2 of 4

Field Label Field Name

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

Field Label – 원하는 항목 이름 기재

Field Name(시스템이 인지하는 언어) 값에는 영문만 입력할 수 있으며 띄어쓰기 사이에는 _(밑줄) 이 들어가야 오류가 나지 않음

어떤 유저가 해당 내용을 볼 수 있는지 권한 설정이 가능(여기서는 모두 체크함) → Next

Setup Home Object Manager

SETUP > OBJECT MANAGER Account

Details Fields & Relationships

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

Field Label: 설립 연도
Data Type: Date
Description:

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

Field-Level Security for Profile	Visible	Read-Only
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
CPQ Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
End User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Executive Sponsor	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Account Layout에서 신규항목을 보게 할 것이기 때문에 체크 표시 → Save

Setup Home Object Manager

SETUP > OBJECT MANAGER Account

Details Fields & Relationships

Step 4. Add to page layouts Step 4 of 4

Field Label: 설립 연도
Data Type: Date
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
 Account Layout

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

SETUP > OBJECT MANAGER

Account

Details	Fields & Relationships	
	25 Items, Sorted by Field Label	
Fields & Relationships		
Page Layouts	Industry	Industry
Lightning Record Pages	Last Modified By	LastModifiedByld
Buttons, Links, and Actions	Ownership	Ownership
Compact Layouts	Parent Account	ParentId
Field Sets	Phone	Phone
Object Limits	Rating	Rating
Record Types	Shipping Address	ShippingAddress
Related Lookup Filters	SIC Code	Sic
Search Layouts	SIC Description	SicDesc
Search Layouts for Salesforce Classic	Ticker Symbol	TickerSymbol
Hierarchy Columns	Type	Type
Triggers	Website	Website
Validation Rules	설립 연도	Year_of_establishment_c
		Date

Quick Find | New | Deleted Fields | Field Dependencies | Set Hierarchy

Account 내에 설립 연도라는 신규 필드값이 생성된것을 확인!
Standard Field 와 Custom Field 값 구분법은 Custom Field 의 Field name 뒤에는 _c 가 붙어있음 (Year_of_estabilshment_c)

Sales Home Accounts Contacts Leads Opportunities

Account Global Media (Sample)

Phone 1 (800) 667-6389 Billing Address 150 Chestnut Street Website Account Owner Kim Yunhee

Related Details

* Account Name Type Website Description

설립 연도

October 2014

28 29 30 1 2 3 4
5 6 7 8 9 10 11
12 13 14 15 16 17 18
19 20 21 22 23 24 25
26 27 28 29 30 31 1
2 3 4 5 6 7 8

Today

설립연도 항목 + 날짜지정 항목 생긴것 확인

Account Owner Kim Yunhee
Parent Account Search Accounts...
Phone 1 (800) 667-6389
Industry Media
Employees 14,668

9. Object 내의 세부 항목을 삭제하고 싶은 경우

Sales Home Accounts Contacts Leads Opportunities Cases Campaigns Tasks

Account
Global Media (Sample)

Phone: 1 (800) 667-6389 Billing Address: 150 Chestnut Street, Toronto, Ontario L4B 1Y3 Canada Website: Account Owner: Kim Yunhee

Related Details News

Account Name	Global Media (Sample)	Account Owner	Kim Yunhee
Type	파트너사	Parent Account	
Website		Phone	1 (800) 667-6389
Description	GBM is the worldwide leader in technology news and information on the Web and the producer of the longest-running and farthest-reaching television shows about technology. GBM's network of sites combines breakthrough interactive technology with engaging content and design and is consistently ranked as the Internet's leading content network in terms of both audience size and revenue, serving millions of users each day.	Industry	Media
설립 연도	2020. 10. 13.	Employees	14,668

Standard Field 값인 Website 항목을 보이지 않게 하고 싶을 경우

Setup → Object Manager → Account → Page Layouts → 불필요한 항목 제거 → Save

Setup Home Object Manager

Account

Page Layouts

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields & Relationships

Fields Buttons Custom Links Quick Actions Mobile & Lightning Actions Expanded Lookups

File

Account Detail Standard Buttons Edit Change Owner Change Record Type Delete New Account Hierarchy Sharing Hierarchy Get Survey Invitation Check for New Data View Partner Scorecard Add to Call List Printable View Get Alerts

Account Information (Header visible on edit only)

Account Name	Sample Text	Account Owner	Sample Text
Website	www.salesforce.com	Billing Address	Sample Text
Type	Sample Text	Created By	Sample Text
Description	Sample Text	Data.com Key	Parent Account
설립 연도	2021. 10. 2.	Annual Revenue	Fax
		Description	Phone
		Last Modified By	SIC Code
			SIC Description
			설립 연도

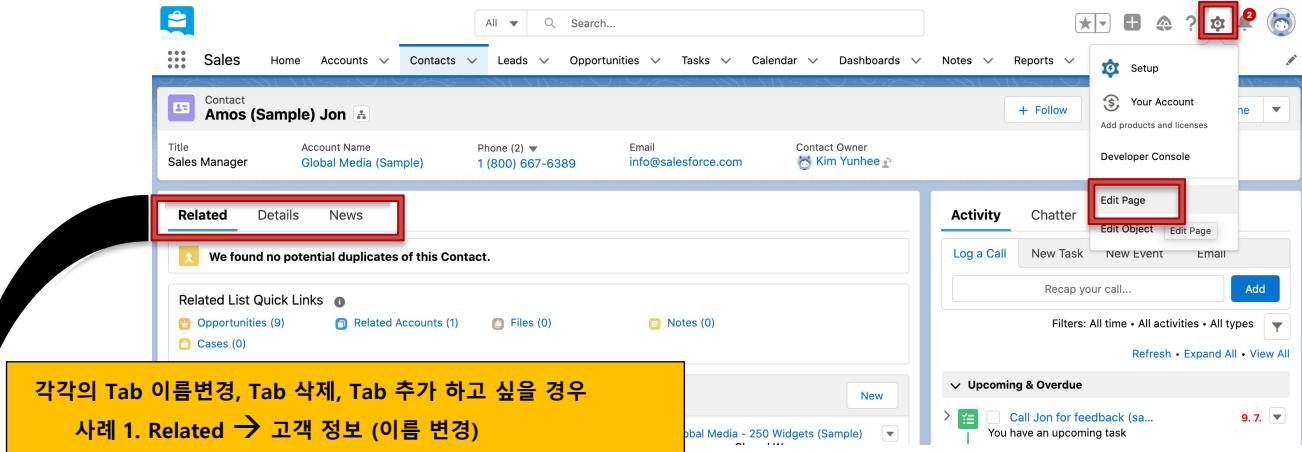
필수 항목 드래그 앤 드랍

불필요한 항목 제거

10. Page Layout 변경 방법

Object 란에 있는 레이아웃을 변경, 추가, 삭제하고 싶은 경우

Setup → Edit Page 클릭



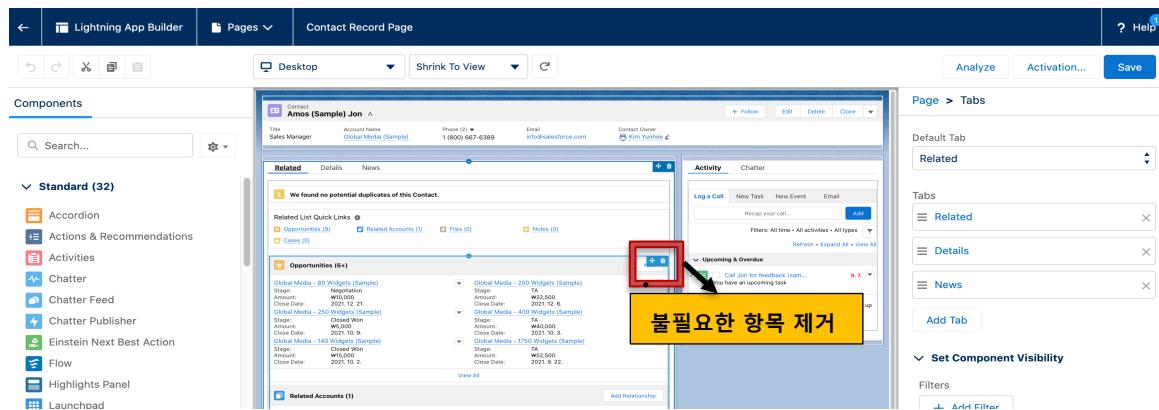
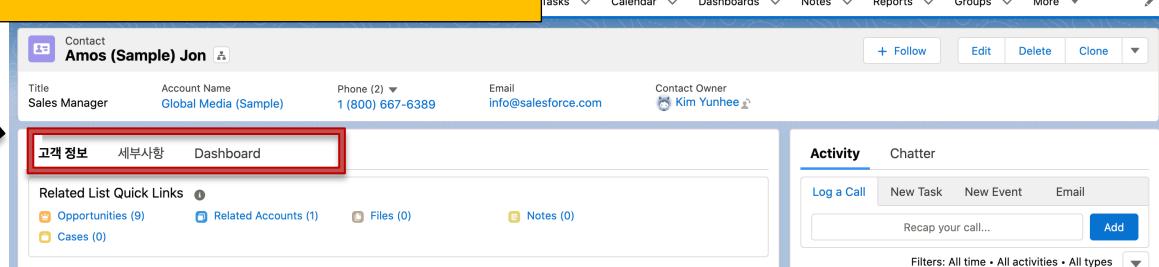
각각의 Tab 이름변경, Tab 삭제, Tab 추가하고 싶을 경우

사례 1. Related → 고객 정보 (이름 변경)

사례 2. Details → 세부사항 (이름 변경)

사례 3. News → 삭제

사례 4. Dashboard 항목 추가



a. 항목 이름 변경

Tab 클릭 → Tab label → Custom → Custom Label 이름 설정 (ex/ Related → 고객정보) → Done → Save 클릭

Desktop Shrink To View C

Analyze Activation... Save

Contact Amos (Sample) Jon A

Title Sales Manager Account Name Global Media (Sample) Phone (2) 1 (800) 667-6389 Email info@salesforce.com Contact Owner Kim Yunhee

Related Details News

Related List Quick Links Opportunities (9) Related Accounts (1) Files (0) Notes (0) Cases (0)

Opportunities (6+)

Global Media - 80 Widgets (Sample) Stage: Negotiation Amount: ₩10,000 Close Date: 2021. 12. 21 Global Media - 250 Widgets (Sample) Stage: Closed Won Amount: ₩5,000 Close Date: 2021. 10. 9. Global Media - 140 Widgets (Sample) Stage: Closed Won Amount: ₩15,000 Close Date: 2021. 10. 2.

Global Media - 200 Widgets (Sample) Stage: TA Amount: ₩22,500 Close Date: 2021. 12. 6. Global Media - 400 Widgets (Sample) Stage: TA Amount: ₩40,000 Close Date: 2021. 10. 3. Global Media - 1750 Widgets (Sample) Stage: TA Amount: ₩62,500 Close Date: 2021. 9. 22.

Activity Chatter

Tab Label Custom * Custom Label 고객 정보 Done

Page > Tabs

Default Tab Related

Tabs

- Related
- Details
- News
- Add Tab

Desktop Shrink To View C

Analyze Activation... Save

Contact Amos (Sample) Jon A

Title Sales Manager Account Name Global Media (Sample) Phone (2) 1 (800) 667-6389 Email info@salesforce.com Contact Owner Kim Yunhee

고객 정보 Details News

Related List Quick Links Opportunities (9) Related Accounts (1) Files (0) Notes (0) Cases (0)

Opportunities (6+)

Global Media - 80 Widgets (Sample) Stage: Negotiation Amount: ₩10,000 Close Date: 2021. 12. 21 Global Media - 250 Widgets (Sample) Stage: Closed Won Amount: ₩5,000 Close Date: 2021. 10. 9. Global Media - 140 Widgets (Sample) Stage: Closed Won Amount: ₩15,000 Close Date: 2021. 10. 2.

Global Media - 200 Widgets (Sample) Stage: TA Amount: ₩22,500 Close Date: 2021. 12. 6. Global Media - 400 Widgets (Sample) Stage: TA Amount: ₩40,000 Close Date: 2021. 10. 3. Global Media - 1750 Widgets (Sample) Stage: TA Amount: ₩62,500 Close Date: 2021. 9. 22.

변경 완료!

Activity Chatter

Log a Call New Task New Event Email Recap your call... Add Filters: All time • All activities • All types Refresh • Expand All • View All Upcoming & Overdue Call Jon for feedback (sam... You have an upcoming task 9. 7. No past activity. Past meetings and tasks marked as done show up here.

Page > Tabs

Default Tab 고객 정보

Tabs

- 고객 정보
- Details
- News
- Add Tab

B. 신규 Tab 추가

Tabs 클릭 → Add Tab → 새로운 Tab 생성 → 신규 Tab 클릭하여 필요한 항목 설정→ Save

Desktop Shrink To View C

Analyze Activation... Save

Contact Amos (Sample) Jon A

Title Sales Manager Account Name Global Media (Sample) Phone (2) 1 (800) 667-6389 Email info@salesforce.com Contact Owner Kim Yunhee

고객 정보 Details News

Related List Quick Links Opportunities (9) Related Accounts (1) Files (0) Notes (0) Cases (0)

Opportunities (6+)

Global Media - 80 Widgets (Sample) Stage: Negotiation Amount: ₩10,000 Close Date: 2021. 12. 21 Global Media - 250 Widgets (Sample) Stage: Closed Won Amount: ₩5,000 Close Date: 2021. 10. 9. Global Media - 140 Widgets (Sample) Stage: Closed Won Amount: ₩15,000 Close Date: 2021. 10. 2.

Global Media - 200 Widgets (Sample) Stage: TA Amount: ₩22,500 Close Date: 2021. 12. 6. Global Media - 400 Widgets (Sample) Stage: TA Amount: ₩40,000 Close Date: 2021. 10. 3. Global Media - 1750 Widgets (Sample) Stage: TA Amount: ₩62,500 Close Date: 2021. 9. 22.

Activity Chatter

Log a Call New Task New Event Email Recap your call... Add Filters: All time • All activities • All types Refresh • Expand All • View All Upcoming & Overdue Call Jon for feedback (sam... You have an upcoming task 9. 7. No past activity. Past meetings and tasks marked as done show up here.

Page > Tabs

Default Tab 고객 정보

Tabs

- 고객 정보
- Details
- News
- Add Tab

The screenshot shows the Salesforce Contact page for 'Amos (Sample) Jon'. The tabs at the top are '고객 정보', 'Details', 'News', and 'Dashboard'. The 'Dashboard' tab is highlighted with a red box. To the right, the 'Tabs' configuration interface is open, showing a list of components under 'Custom'. The 'Dashboard' component is selected and highlighted with a red box. The 'Save' button at the top right of the interface is also highlighted with a red box.

This screenshot shows the same contact record and tabs configuration interface, but the 'Dashboard' tab is now highlighted with a red box on the contact page itself. A yellow box highlights the message 'Dashboard 항목 생성 완료' (Dashboard item creation completed).

c. TAB 아래 내용 추가하고 싶은 경우

This screenshot illustrates adding components below the tabs. A red box highlights the 'Dashboard' tab on the contact page. A callout arrow points from this tab to a yellow box containing the text 'Add Components 란에 항목 추가 방법' (How to add items to the Add Components list). The 'Activity' section on the right is also visible.

Components → Related list-Single 검색 → Tab 하단에 Drag & Drop

The screenshot shows the Lightning App Builder interface. In the top navigation bar, there are tabs for 'Lightning App Builder', 'Pages', and 'Contact Record Page'. On the right side, there are buttons for 'Analyze', 'Activation...', and 'Save'. Below the navigation, there's a toolbar with icons for back, forward, search, and refresh. The main area is divided into two sections: 'Components' on the left and 'Page > Tabs' on the right. In the 'Components' section, a search bar has 'related list' typed into it and is highlighted with a red box. A black arrow points from this search result to its detailed description: 'Related List - Single. Display one related list for the record. Supported form factors: desktop and phone.' The 'Page > Tabs' section shows a 'Default Tab' with '고객 정보' (Customer Information) selected. To the right, there are tabs for 'Details', 'News', and 'Dashboard', each with a close button.

Tab 하단에 Drag & Drop 이후에 Activity history 라는 항목생성 → 오른쪽 Related List 필터에서 넣고 싶은 항목 선택
(대시보드 안에 있는 관련 리스트들이 나오기때문에, 파일, 케이스 등등 대시보드와 관련된 항목들이 나온다)

This screenshot shows the same Lightning App Builder interface as the previous one, but with a yellow box highlighting a message in the center: '오른쪽 Related list에서 넣고 싶은 항목 클릭(ex/ File) 생성 완료!' (Click on the right Related list to add the desired item (e.g., File). Creation completed!). The right sidebar shows the 'Page > Related List - Single' configuration, specifically the 'Related List' filter section where 'Activity History' is selected and highlighted with a red box.

11. Standard Object 확인해보기

(세일즈포스에서 제공하는 기본 항목들)

우측 연필 모양 클릭 → Add more Items → All 클릭 → 필요한 object 추가

This screenshot shows the Salesforce Sales dashboard. At the top, there's a navigation bar with links for Sales, Home, Chatter, Accounts, Contacts, Leads, Opportunities, Dashboards, Reports, Products, Salesforce Scheduler Setup Assistant, Work Orders, Scheduling Policies, and a Personal icon with an edit symbol. Below the navigation is a chart titled 'My Pipeline' showing 'Sum of Amount' across different stages: 상당 접수 (0), 계약서 전달 (100k), 보류 (200k), and 입금 확인 (500k). To the right of the chart is an 'Einstein Insights' section with a cartoon character and the text 'No insights at the moment. Einstein is analyzing your data 24/7. To see all your relevant insights, make sure you're following all the records that are important to you. Tell Me More'.

Edit Sales App Navigation Items

Personalize your nav bar for this app. Reorder items, and rename or remove items you've added.
[Learn More](#) (1)

NAVIGATION ITEMS (12)

Add More Items

- ≡  Home
- ≡  Chatter
- ≡  Accounts
- ≡  Contacts
- ≡  Leads
- ≡  Opportunities
- ≡  Dashboards
- ≡  Reports
- ≡  Products

X

Add Items

Available Items

Favorites

All

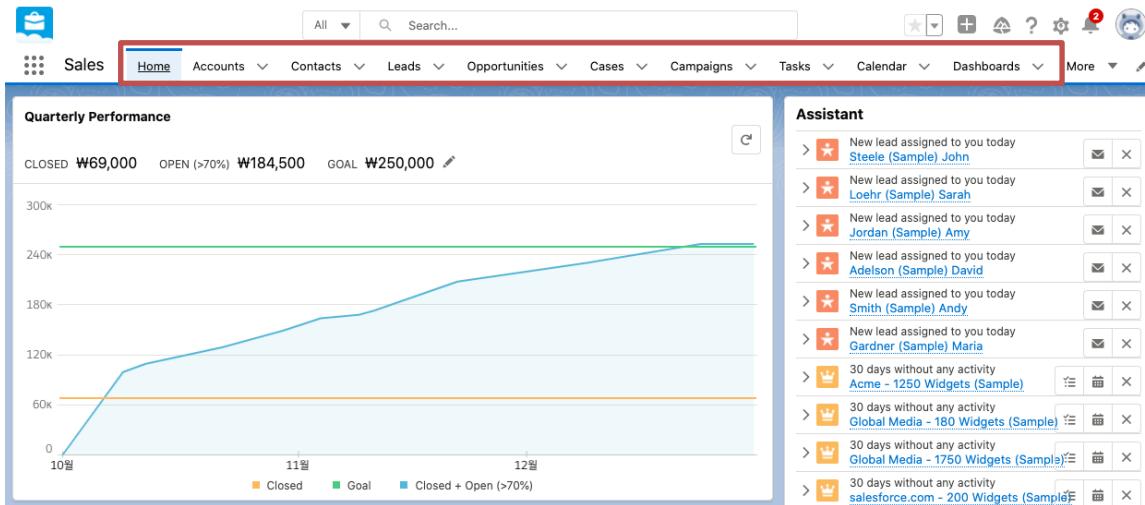
Search all items...

0 items selected

- + *Case History
- + *Chat Transcript History
- + *Voice Call History
- + Account Balance Snapshots
- + Account Brands
- + Account Relationships
- + Aging Buckets
- + Alternative Payment Methods
- + Analytics

12. 신규 Custom Object 생성하기

사례: 프로젝트라는 신규 Object 를 생성하고 싶은데, 기존 Standard Object 에는 없는 경우
 (기존에 제공되는 수많은 Standard Object 에서 비슷한 항목을 선택해서 일부 수정하는 것을 권장하지만 아예 모든
 것을 새롭게 만들고 싶으면 Custom object 이용)



Custom Object(ex/ Project type) 생성 방법

Setup → Object Manager → Create → Custom Object 클릭 → Label (Project Type 입력) → Save

The screenshot shows the Salesforce Object Manager screen under the Setup tab. The 'Object Manager' button is selected. On the right side, there is a 'Create' button with a dropdown menu. The 'Custom Object' option is highlighted with a red box. The main table lists standard objects like Account, Account Contact Relationship, Activity, Asset, and Asset Relationship.

The screenshot shows the 'New Custom Object' creation screen under the Setup tab. At the top, there is a message about permissions being disabled by default. The 'Custom Object Definition Edit' form has several fields with validation errors:

- Label:** 풋프로젝트 (highlighted with a red box)
- Plural Label:** 풋프로젝트 (highlighted with a red box)
- Object Name:** Project (highlighted with a red box)
- Description:** (empty text area)

A yellow callout box highlights the 'Label' field with the text "Label: Object 이름 기재" and "Object Name 란은 반드시 영어로 기재".

At the bottom, there are context-sensitive help settings:

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

The screenshot shows the Salesforce Object Manager page. At the top, there's a navigation bar with tabs: Setup, Home, and Object Manager (which is currently selected). Below the navigation bar is a search bar labeled 'Quick Find' and buttons for 'Schema Builder' and 'Create'. The main content area is titled 'Object Manager' and displays a list of objects, each with its name, type, and status. The list includes: Quick Text, QuickText, Standard Object; Quote, Quote, Standard Object; Quote Line Item, QuoteLineItem, Standard Object; Recommendation, Recommendation, Standard Object; Scorecard, Scorecard, Standard Object; Scorecard Association, ScorecardAssociation, Standard Object; Scorecard Metric, ScorecardMetric, Standard Object; Social Persona, SocialPersona, Standard Object; Social Post, SocialPost, Standard Object; Task, Task, Standard Object; User, User, Standard Object; User Provisioning Request, UserProvisioningRequest, Standard Object; Voice Call, VoiceCall, Standard Object; Work Order, WorkOrder, Standard Object; and Work Order Line Item, WorkOrderLineItem, Standard Object. At the bottom of the list, there's a row for '프로젝트' (Project), 'Project_c', and 'Custom Object'. The entire list is enclosed in a red border.

Custom Object 생성(ex/ 프로젝트)이후 Custom Tab 을 별도로 생성

(Custom Object 만 단독으로 생성하면 아무것도 나타나지 않음, 반드시 Custom Tab 을 함께 생성 해야만 세일즈포스 사용자 화면에서 나타남)

Custom Tab 을 생성 방법

Setup → Home → Tabs → Custom Object Tabs → Custom Object Tabs 의 New 설정 → Object 에서 Project Type 설정(예시) & Tab Style 아무거나 선택 → Save

The screenshot shows the Salesforce Setup page under the 'Tabs' section. At the top, there's a search bar with the text 'tab' and a navigation bar with tabs: Setup, Home, Object Manager. The main content area is titled 'Custom Tabs' and contains a brief description: 'You can create new custom tabs to extend Salesforce functionality or to build new application functionality.' Below this, there's a section titled 'Custom Object Tabs' with a note: '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.' At the bottom of this section, there are two buttons: 'New' and 'What Is This?'. The entire 'Custom Object Tabs' section is enclosed in a red border.

Setup Home Object Manager

Tab

User Interface

Rename Tabs and Labels

Tabs

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

SETUP Tabs

New Custom Object Tab

Step 1. Enter the Details Step 1 of 3

Choose the custom object for this new custom tab. Fill in other details.

Select an existing custom object or create a new custom object now.

Object: --None-- 프로젝트

Tab Style: Bell

(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:

Enter a short description.
Description:

Next Cancel

방금 만들었던 Object 프로젝트 선택

Setup Home Object Manager

Tab

User Interface

Rename Tabs and Labels

Tabs

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

SETUP Tabs

New Custom Object Tab

Step 1. Enter the Details Step 1 of 3

Choose the custom object for this new custom tab. Fill in other details.

Select an existing custom object or create a new custom object now.

Object: --None-- 프로젝트

Tab Style: Bell

(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:

Enter a short description.
Description:

Next Cancel

Tab Style 원하는 색으로 선택

Get Started Check Out Top Features ▾

Setup Home Object Manager ▾

tab

User Interface

Rename Tabs and Labels

Tabs

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

SETUP Tabs

Select an existing custom object or create a new custom object now

Object Project Type ▾

Tab Style Compass Error: Please choose a tab style

(Optional) Choose a Home Page Custom Link to show as a splash

Splash Page Custom Link None ▾

Enter a short description.

Description



Setup Home Object Manager ▾

Tab

User Interface

Rename Tabs and Labels

Tabs

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

SETUP Tabs

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
Contract Manager	Default On
CPQ Integration User	Default On
End User	Default On
Executive Sponsor	Default On
Identity User	Default On
Marketing User	Default On
Minimum Access - Salesforce	Default On
Read Only	Default On
Solution Manager	Default On
Standard User	Default On
System Administrator	Default On

Previous Next Cancel

Object Manager ▾

Search Setup

Sample Console (standard_ServiceConsole)

Sales (standard_LightningSales)

Sales Console (standard_LightningSalesConsole)

Relationship Management (Relationship_Management)

Lead Generation (Lead_Generation)

Sales Operations (Sales_Operations)

Sales Leadership (Sales_Leadership)

Lightning Usage App (standard_LightningInstrumentation)

Bolt Solutions (standard_LightningBolt)

Salesforce CMS (standard_SalesforceCMS)

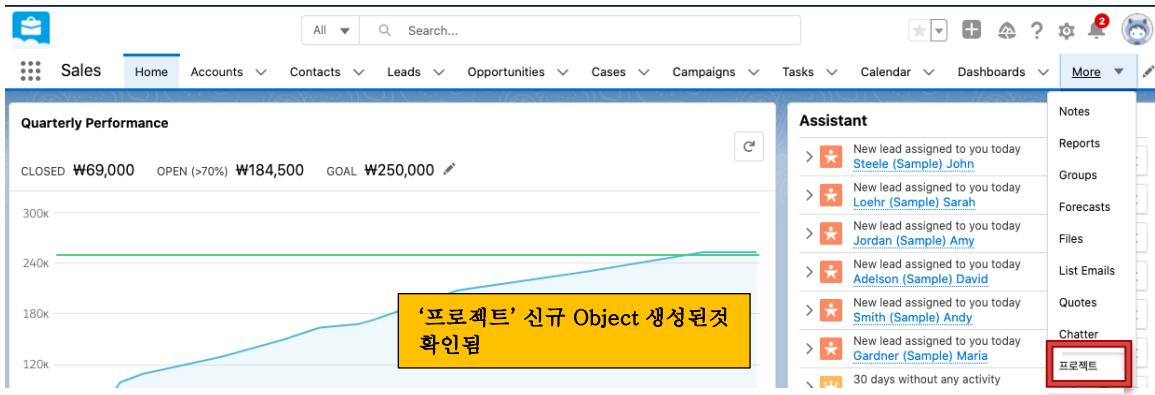
Your Account (standard_OnlineSales)

Append tab to users' existing personal customizations

Save

Cancel

Save 후 프로젝트 Tab 생성도 완료!

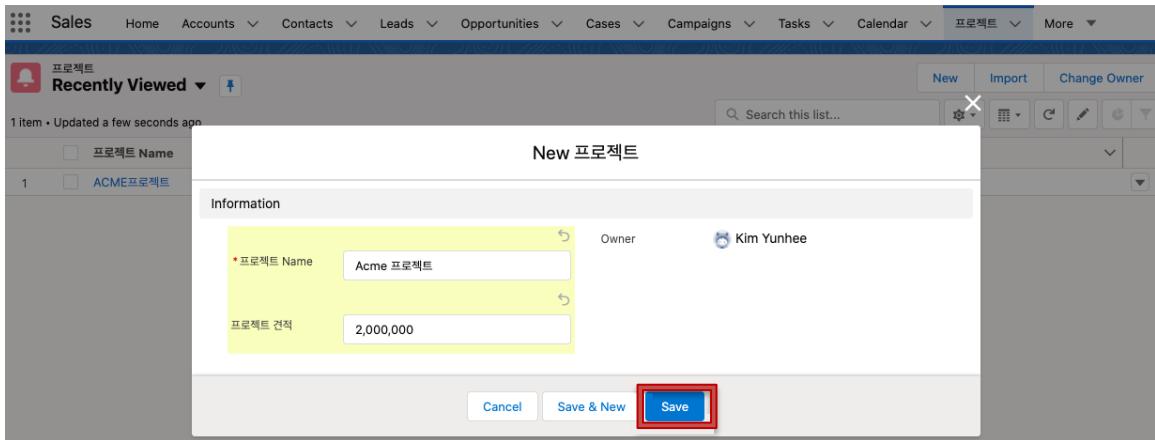


해당 프로젝트 화면으로 들어가면, 단순 항목만 조회됨

항목들을 추가하고 싶을 경우 위에서 설명한 'Object 항목 아래 신규 필드값 생성하는 방법 확인 (10Page)

(Setup → Object Manager → 신규생성한 Object '프로젝트' 검색 → Fields & Relationships → New 신규 항목들 모두 추가)

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		
프로젝트 Name	Name	Text(80)		

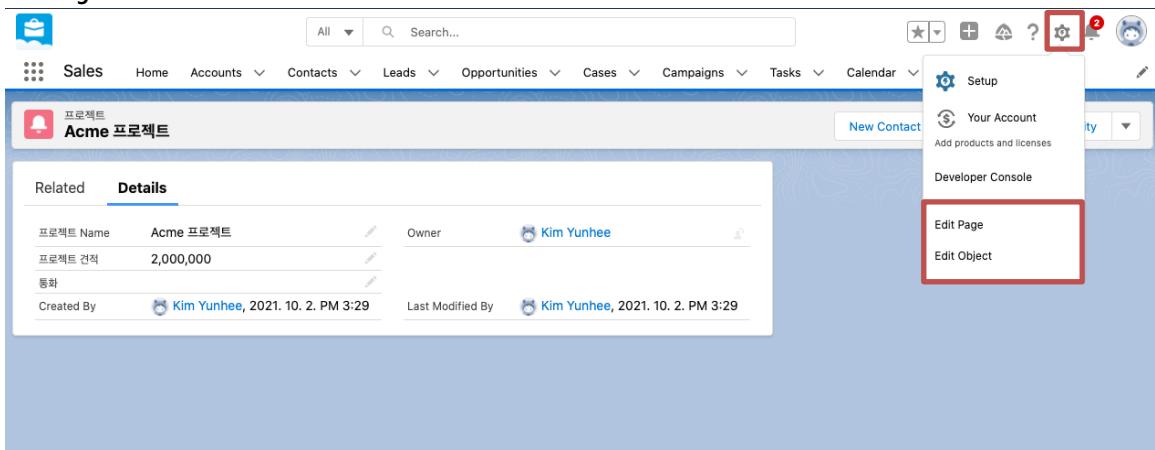


새로운 데이터를 입력한 이로 프로젝트 오브젝트 내역으로 들어가보자
아래와 같은 심플한 화면이 확인됨.

아래 2 곳으로 들어가서 원하는 대로 화면 구성 가능 (10-16 쪽 참고)

Edit object → 프로젝트 → Page Layouts

Edit Page



13. Lookup: Object Relationship (두개의 Object 혹은 필드끼리 연동 맺기)

(엑셀의 VLOOKUP 개념으로 이해하면 됩니다)

사례 : 고객의 연락처 항목 추가보기

고객 연락처 항목을 만든 후에 기존에 있던 고객 연락처를 끌어와야되기 때문에 **Lookup relationship** 기능 사용

New relationship에서 contact 정보를 끌어올 것인가 때문에 Contact 클릭

Field Label (원하는 명칭으로 기재), Field Name(영어로 기재) → Next

Project Type

Fields & Relationships

New Relationship

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

Field Label: 고객 연락처
Field Name: Contact_info

Child Relationship Name: Project_Type
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.

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

Lookup Filter
Optionally, create a filter to limit the records available to users in the lookup field. [Tell me more!](#)

Step 3 of 6

Previous Next Cancel

Project Type

Fields & Relationships

Step 4. Establish field-level security for reference field

Field Label: 고객 연락처
Data Type: Lookup
Field Name: Contact_info
Description:

Field-Level Security for Profile	Visible	Read-Only
*Champions	<input checked="" type="checkbox"/>	<input type="checkbox"/>
*Customer Community - Members	<input checked="" type="checkbox"/>	<input type="checkbox"/>
*Customer Community Plus	<input checked="" type="checkbox"/>	<input type="checkbox"/>
*Marketing	<input checked="" type="checkbox"/>	<input type="checkbox"/>
*Partners	<input checked="" type="checkbox"/>	<input type="checkbox"/>
*Platform Administrator	<input checked="" type="checkbox"/>	<input type="checkbox"/>
*Sales	<input checked="" type="checkbox"/>	<input type="checkbox"/>
*Service	<input checked="" type="checkbox"/>	<input type="checkbox"/>
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"/>
BBB Commerce Customer Community User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
BBMIA Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Basic Customer Portal Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Bronze Partner User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Chatter Only User	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Step 4 of 6

Previous Next Cancel

Project Type

Fields & Relationships

New Relationship

Step 5. Add reference field to Page Layouts

Field Label: 고객 연락처
Data Type: Lookup
Field Name: Contact_info
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
 Project Type Layout

Step 5 of 6

Previous Next Cancel

SETUP > OBJECT MANAGER
Project Type

Fields & Relationships

Details
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
Search Layouts for Salesforce Classic
Triggers
Validation Rules

New Relationship

Step 6. Add custom related lists

Field Label: 고객 연락처
Data Type: Lookup
Field Name: Contact_info
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 Related List Page Layout Name:
 SDO - Contact
 SDO - Contact Community
 SDO - Cust360
 SDO - Cust360 Contact
 SDO - Partner Contact
 SDO - Person Account Community
 SDO - Person Account Layout

Append related list to users' existing personal customizations

Help for this Page
Previous Save & New Save Cancel

고객 연락처라는 신규 항목이 생겼고, 우측 연필 모양을 클릭하면 기존 고객연락처들이 끌어져 오는 것을 확인 할 수 있음

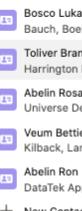
Project Type
수진주식회사 A프로젝트

Related Details

Project Type Name: 수진주식회사 A프로젝트
Account: 
Opportunity: 수진주식회사-기존 관리 고객 (Service)
Project: 고용지원금;기업인증;법인전환
Customer: 
Created By: Kim Yunhee, 2021. 9. 14. AM 7:41
Last Modified By: Kim Yunhee, 2021. 10. 6. PM 10:43

Search Accounts... 

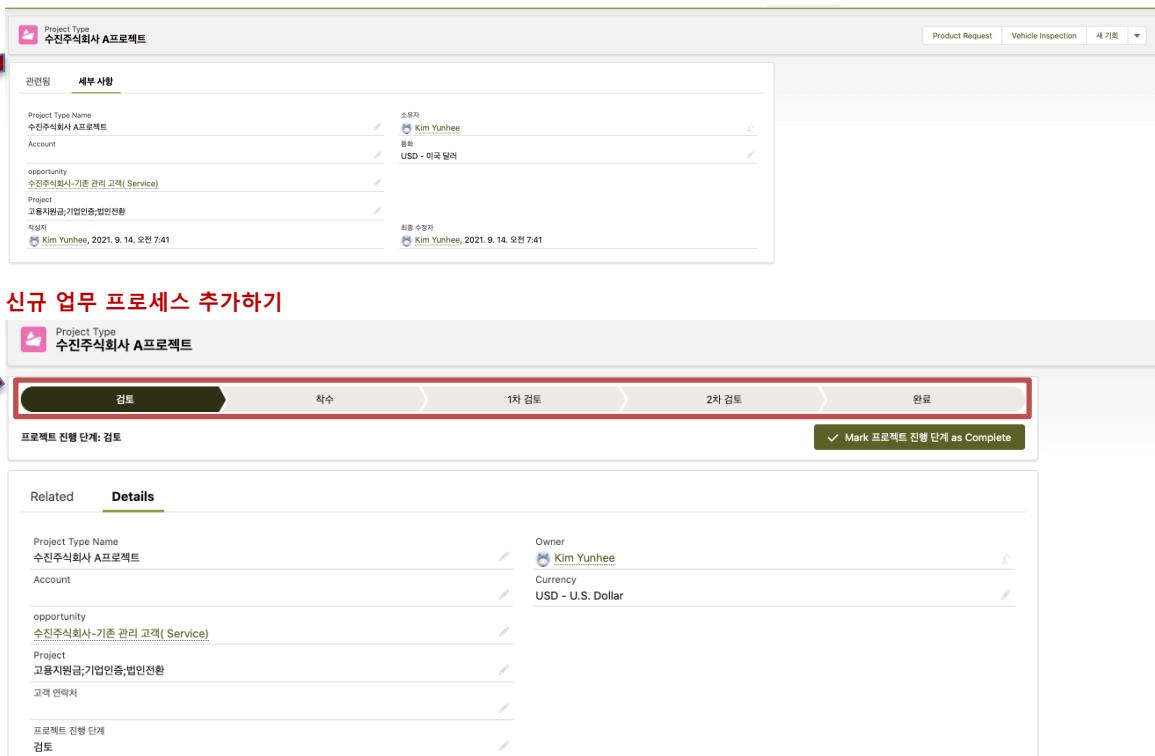
USD - U.S. Dollar

Recent Contacts:

 Bosco Lukas Bauch, Boehm and Jacobson
 Toliver Brannon Harrington Bottling Company
 Abelin Rosa Universe Design
 Veum Bettie Kilback, Langosh and Schoen
 Abelin Ron DataTek Applications
 + New Contact
 Search Contacts... 

Created By: Kim Yunhee, 2021. 9. 14. AM 7:41
Last Modified By: Kim Yunhee, 

Cancel Save

14. 신규 업무 프로세스 설정방법



The screenshot shows the Salesforce Project Type object setup page. A red arrow points from the top-left towards the 'Fields & Relationships' tab, which is highlighted with a red box. The 'Details' tab is also visible above it.

Project Type Name: 수진주식회사 A프로젝트

Account: [Blank]

opportunity: 수진주식회사-기존 관리 고객(Service)

Project: 고용지원금, 기업인증, 법인전환

작성자: Kim Yunhee, 2021. 9. 14. 오전 7:41

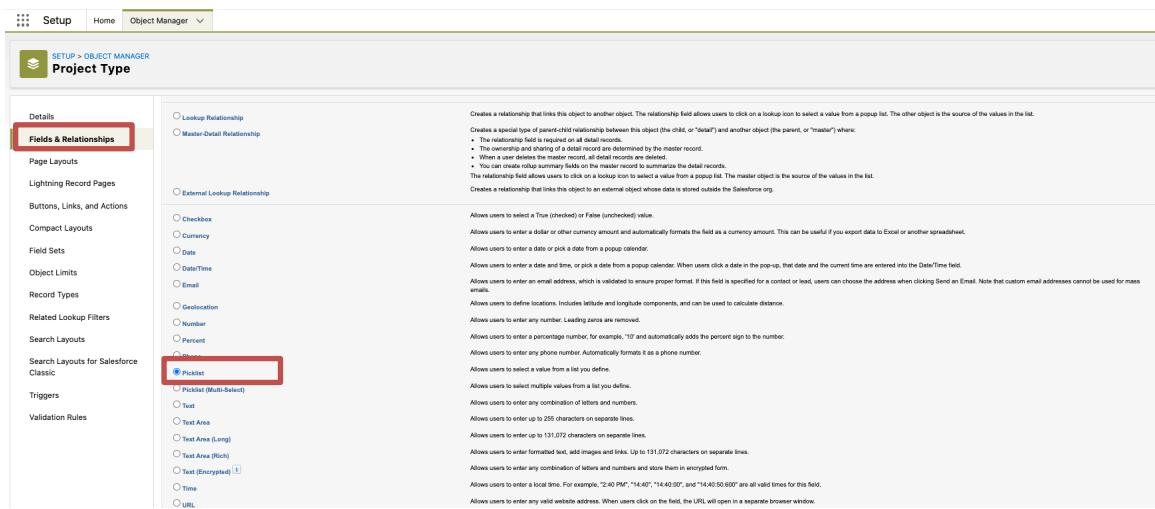
Owner: Kim Yunhee

Currency: USD - 미국 달러

최종 수정자: Kim Yunhee, 2021. 9. 14. 오전 7:41

Mark Project Type 진행 단계 as Complete

동일하게 Setup → Object Manager → 변경하고 싶은 Object 클릭 (예시: Project Type object)



The screenshot shows the Salesforce Object Manager for the Project Type object. The 'Fields & Relationships' tab is selected and highlighted with a red box. The 'Details' tab is also visible above it.

Fields & Relationships

- Lookup Relationship
- Master-Detail Relationship
- External Lookup Relationship
- Picklist
- Picklist (Multi-Select)
- Text
- Date
- Date/Time
- Email
- Geolocation
- Number
- Percent
- Phone
- URL

Field Label → Enter values, with each value separated by a new line 클릭, 필요한 프로젝트별 단계 설정

SETUP > OBJECT MANAGER

Project Type

Step 2. Enter the details

Details

Fields & Relationships

Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
Search Layouts for Salesforce Classic
Triggers
Validation Rules

Field Label: [i]

Values: Enter values, with each value separated by a new line
 Use global picklist value set
 Enter values, with each value separated by a new line
 Display values alphabetically, not in the order entered
 Use first value as default value
 Restrict picklist to the values defined in the value set [i]

Value Set Options:
 0 단계
 1 단계
 1A 단계
 2 단계
 2A 단계
 3 단계

Field Name: [i]

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 [i]

Default Value: Show Formula Editor

Step 2 of 4

Previous Next Cancel

Step 3. Establish field-level security

Field Label	프로젝트 진행 단계	Visible	Read-Only
Data Type	Picklist	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Field Name	Project_stage	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Description		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.			
Field-Level Security for Profile		<input checked="" type="checkbox"/>	<input type="checkbox"/>
*Channels		<input checked="" type="checkbox"/>	<input type="checkbox"/>
*Customer Community - Members		<input checked="" type="checkbox"/>	<input type="checkbox"/>
*Customer Community Plus		<input checked="" type="checkbox"/>	<input type="checkbox"/>
*Marketing		<input checked="" type="checkbox"/>	<input type="checkbox"/>
*Partners		<input checked="" type="checkbox"/>	<input type="checkbox"/>
*Platform Administrator		<input checked="" type="checkbox"/>	<input type="checkbox"/>

Project Type
New Custom Field

Step 4. Add to page layouts

Field Label: 프로젝트 진행 단계
Data Type: Picklist
Field Name: Project_stage
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
 Project Type Layout

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

Step 4 of 4

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

Project type 진행 스테이지가 생성된 것을 확인할 수 있음!

 Project Type
수진주식회사 A프로젝트

Related **Details**

Project Type Name
수진주식회사 A프로젝트

Owner
 Kim Yunhee

Account
Search Accounts... 

Currency
USD - U.S. Dollar 

opportunity
 수진주식회사-기존 관리 고객(Service) 

Project
Available

Chosen

정책
연구소 특허
고용지원금
기업인증
법인진환

고객 연락처
Search Contacts... 

프로젝트 진행 단계
--None--

Project Type
수진주식회사 A프로젝트

Related Details

Project Type Name: 수진주식회사 A프로젝트

Owner: Kim Yunhee

Account: Search Accounts... Currency: USD - U.S. Dollar

opportunity: 수진주식회사-기존 관리 고객(Service)

Project:

Available Chosen

정책 고용지원금

--None--
검토
착수
1차 검토
2차 검토
완료
--None--

Created By: Kim Yunhee, 2021. 9. 14. AM 7:41 Last Modified By: Kim Yunhee, 2021. 10. 6. PM 10:50

Cancel Save

위 스테이지를 도식화 하고 싶은 경우

Setup → Edit page

Project Type
수진주식회사 A프로젝트

Related Details

Project Type Name: 수진주식회사 A프로젝트

Owner: Kim Yunhee

Account: Search Accounts... Currency: USD - U.S. Dollar

opportunity: 수진주식회사-기존 관리 고객(Service)

Project:

Available Chosen

정책 고용지원금
연구소 특허 기업인증
법인전환

고객 연락처: Search Contacts...
프로젝트 진행 단계: --None--

Setup for current app
Product Request Vehicle
Marketing Setup
Service Setup
Your Account
Add products and licenses
Developer Console
Edit Page
Edit Object

Path Drag & Drop → Setup Path 클릭

Desktop Shrink To View

Components Fields

Path

Project Type
수진주식회사 A프로젝트

Related Details

Project Type Name: 수진주식회사 A프로젝트

Owner: Kim Yunhee

Account: Search Accounts... Currency: USD - U.S. Dollar

opportunity: 수진주식회사-기존 관리 고객(Service)

Project:
정책
고용지원금,기업인증,법인전환
고객 연락처
프로젝트 진행 단계
--None--

Page > Path

Format: Linear
Hide path update button
Path content is configured in Setup.
See How It Works
Configure the Path
Set Up Path
Set Component Visibility
Add Filter

신규 Path setting에서 New Path 클릭

The screenshot shows the 'Path Settings' page under the 'Setup' tab. On the left, there's a sidebar with various setup categories like Service Setup Assistant, Multi-Factor Authentication Assistant, Release Updates, etc. The main area is titled 'Path' and contains a list of existing paths:

Path Name	Active	Object	Record Type	Action
Service - Case Path	<input checked="" type="checkbox"/>	Case	Case	Delete Edit Deactivate
OMS - Fulfillment Order	<input checked="" type="checkbox"/>	Fulfillment Order	Fulfillment Orders	Delete Edit Deactivate
CPQ - Invoice Status	<input checked="" type="checkbox"/>	Invoice (Billing)	--Master--	Delete Edit Deactivate
Sales - Lead Path	<input checked="" type="checkbox"/>	Lead	Lead	Delete Edit Deactivate
Sales - Partner Deal Registration	<input checked="" type="checkbox"/>	Lead	Lead - Deal Registration	Delete Edit Deactivate
Sales Path	<input checked="" type="checkbox"/>	Opportunity	Simple Opportunity	Delete Edit Deactivate

A prominent red box highlights the 'New Path' button at the top right of the table.

프로젝트 Path Name, API Name 등 이름 넣기

The screenshot shows the first step of the 'Service Setup Assistant' wizard, titled 'Name Your Path and Choose an Object'. It has two progress steps: 'Fields and Text' and 'Finish'. The form fields are:

- Path Name: Project Path
- API Reference Name: Project_Path
- Object: Project Type (highlighted with a red box)
- Record Type: --Master--
- Picklist: 프로젝트 진행 단계

A yellow callout box with the text '어느 오브젝트에 프로젝트 Path 를 넣을 것인지 결정' is positioned over the 'Object' field.

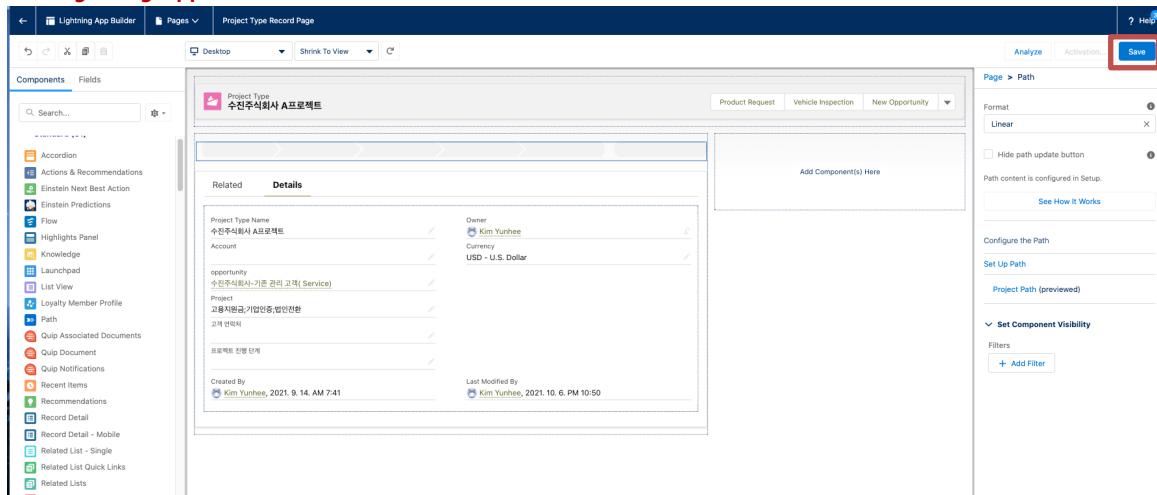
At the bottom right, a red box highlights the 'Next' button.

각 단계별 넣고 싶은 항목도 추가할 수 있으나, 여기선 프로젝트 단계만 설정할 것이므로 바로 Next

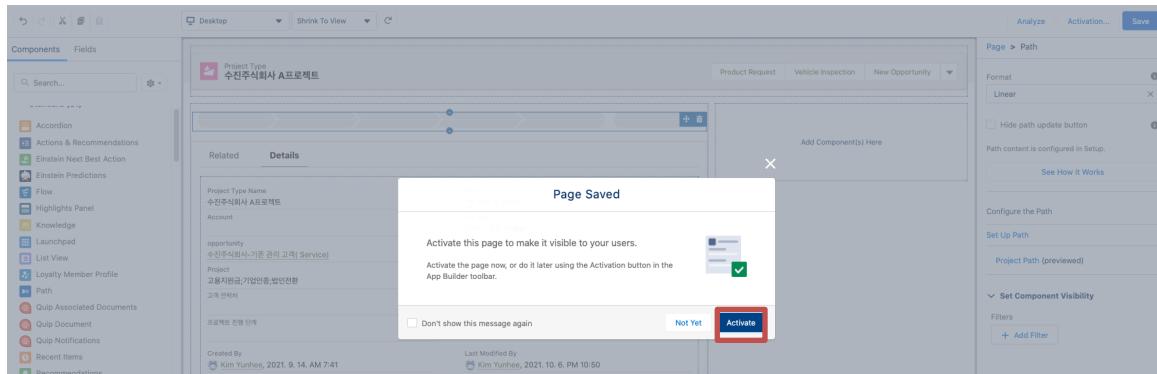
Project path에 대한 신규 Type이 생성된 것을 확인

Path	Record Type	Object	Actions
Service - Case Path	<input checked="" type="checkbox"/>	Case	Case Delete Edit Deactivate
OMS - Fulfillment Order	<input checked="" type="checkbox"/>	Fulfillment Order	Fulfillment Orders Delete Edit Deactivate
CPQ - Invoice Status	<input checked="" type="checkbox"/>	Invoice (Billing)	--Master-- Delete Edit Deactivate
Sales - Lead Path	<input checked="" type="checkbox"/>	Lead	Lead Delete Edit Deactivate
Sales - Partner Deal Registration	<input checked="" type="checkbox"/>	Lead	Lead - Deal Registration Delete Edit Deactivate
Sales Path	<input checked="" type="checkbox"/>	Opportunity	Simple Opportunity Delete Edit Deactivate
Sales - Order status	<input checked="" type="checkbox"/>	Order	--Master-- Delete Edit Deactivate
Payment	<input checked="" type="checkbox"/>	Payment	--Master-- Delete Edit Deactivate
PMT Task Path	<input checked="" type="checkbox"/>	PMT Task	--Master-- Delete Edit Deactivate
Project Path	<input checked="" type="checkbox"/>	Project Type	--Master-- Delete Edit Deactivate

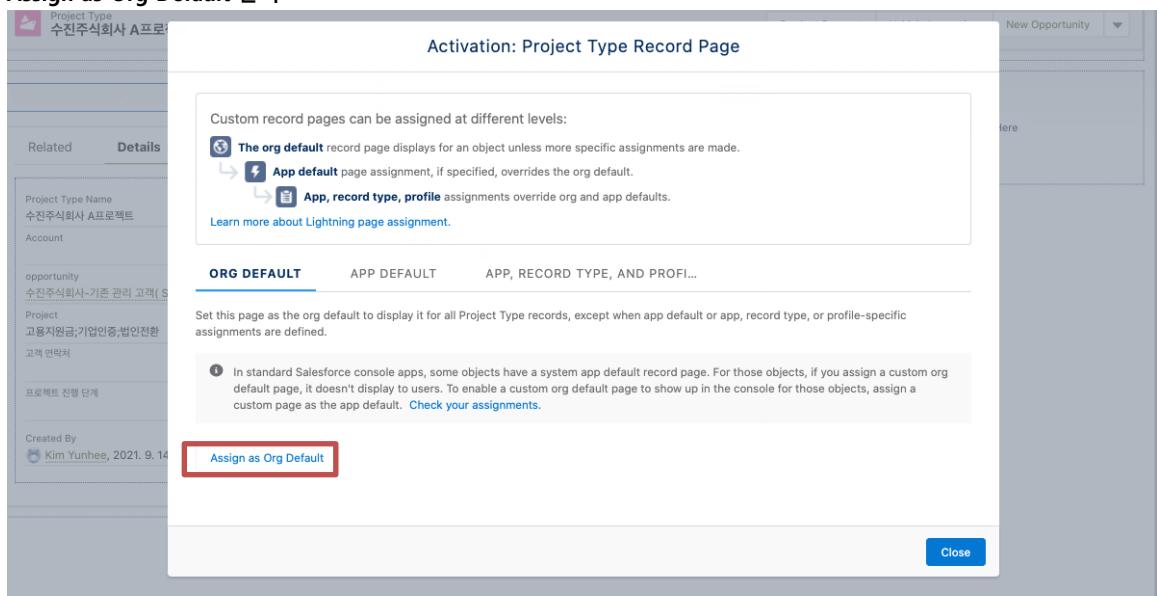
다시 Lightning App Builder 로 들어가서 Save



Activate 클릭



Assign as Org Default 클릭



Project Type 수진주식회사 A프로젝트

Product Request | Vehicle Inspection | New Opportunity | ▾

Related Details

Project Type Name 수진주식회사 A프로젝트

Account

opportunity 수진주식회사-기존 관리 고객(Service)

Project 고용지원금;기업인증;법인전환 고객 연락처

프로젝트 진행 단계

Created By Kim Yunhee, 2021. 9. 14.

Cancel

Assign form factor

Select the form factors that you want your org default page to be available for.

Desktop

Phone

Desktop and phone

Back Next

Components Fields

Search...

Accordion Actions & Recommendations Einstein Next Best Action Einstein Predictions Flow Highlights Panel Knowledge Launchpad List View Loyalty Member Profile Path Quip Associated Documents Quip Document Quip Notifications Recent Items

Project Type

수진주식회사 A프로젝트

Product Request | Vehicle Inspection | New Opportunity | ▾

Related Details

Add Component

Review assignment

Review Assignments (1)

Form Factor	Current Org Default	New Org Default
Desktop	System Default	Project Type Record Page

Created By Kim Yunhee, 2021. 9. 14. AM 7:41 Last Modified By Kim Yunhee, 2021. 10. 6. PM 10:50

Back Save

Sales Home Chatter Accounts Contacts Cases Leads Opportunities Reports Dashboards Calendar Anniversary Campaigns Work Orders

Project Type

수진주식회사 A프로젝트

검토 체수 1차 검토 2차 검토 완료

프로젝트 진행 단계: 검토

Mark 프로젝트 진행 단계 as Complete

Related Details

Project Type Name 수진주식회사 A프로젝트

Account

opportunity 수진주식회사-기존 관리 고객(Service)

Project 고용지원금;기업인증;법인전환 고객 연락처

프로젝트 진행 단계

검토

Created By Kim Yunhee, 2021. 9. 14. AM 7:41

Last Modified By Kim Yunhee, 2021. 10. 6. PM 11:25

화면에 프로젝트 단계별 상황
조회 완료

15. Path 변경 방법

(위와 동일한 방식으로 Picklist에서 변경 가능)

예시: 기존에 있던 Opportunity 프로세스 바꾸기

The screenshot shows two screenshots of the Salesforce Opportunities page side-by-side, illustrating how to change a process flow.

Top Screenshot: Shows the Opportunity record for "Acme - 130 Widgets (Sample)". The process stage is currently set to "Closed". A large yellow box highlights the process steps: TA → Needs Analysis → Proposal → Negotiation → Closed. A red arrow points from this stage to the second screenshot below.

Bottom Screenshot: Shows the Opportunity record for "주식회사". The process stage is also set to "Closed". A red arrow points from the top screenshot's highlighted stage to this one. This screenshot shows a different process flow: TA → 보류 → 프로젝트 결정 → 견적 전달 → 계약서전달 → 프로젝트 완료 → Closed.

영상참고: <https://www.youtube.com/watch?v=vNH4nUJAS7k>

Setup → Object manager → Opportunity

The screenshot shows the Salesforce Setup interface with the "Object Manager" selected. A red box highlights the "Object Manager" tab in the top navigation bar. Another red box highlights the search bar at the top right containing the text "opportunity".

The main area displays a table of objects:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Opportunity	Opportunity	Standard Object			
Opportunity Contact Role	OpportunityContactRole	Standard Object			
Opportunity Product	OpportunityLineItem	Standard Object			

Fields & Relationships → Stage → Opportunity Stages Picklist Values → New 클릭

Opportunity

Fields & Relationships

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Stage	StageName	Picklist		

Opportunity Stages Picklist Values

Action	Stage Name	API Name	Type	Probability	Forecast Category	Chart Colors	Modified By
Edit Del Deactivate	Qualification	Qualification	Open	10%	Pipeline	Assigned dynamically	Kim Yunhee, 2021. 9. 15. PM 8:52
Edit Del Deactivate	Needs Analysis	Needs Analysis	Open	35%	Pipeline	Assigned dynamically	Kim Yunhee, 2021. 9. 15. PM 8:52
Edit Del Deactivate	Proposal	Proposal	Open	75%	Best Case	Assigned dynamically	Kim Yunhee, 2021. 9. 15. PM 8:52

신규 생성하고 싶은 Stage 생성 (Probability- 계약될 확률 단계별 지정)

(중요 Tip: 진행중인 프로세스는 Type에 Open이라 기재하고, 계약&진행이 완료된 프로세스는 Type에 Closed won/lost로 표시)

Opportunity Stages

Stage Name: TA
Type: Open
Probability: 10%
Forecast Category: Pipeline
Chart Color: Assigned dynamically

Sales Process
 Channel Sales Process
 Sales processes customize
 Simple Sales Process

만 밑에 Sales Process 부분 체크해야 됨
미체크시, 사용자 화면에 Sales path 나타나지 않음 → Save

기존 Sample (Qualification, Needs Analysis 등) 은 모두 Deactivate

Action	Stage Name	API Name	Type	Probability	Forecast Category	Chart Colors	Modified By
Edit Del Deactivate	Qualification	Qualification	Open	10%	Pipeline	Assigned dynamically	Kim Yunhee, 2021. 9. 15. PM 8:52
Edit Del Deactivate	Needs Analysis	Needs Analysis	Open	35%	Pipeline	Assigned dynamically	Kim Yunhee, 2021. 9. 15. PM 8:52
Edit Del Deactivate	Proposal	Proposal	Open	75%	Best Case	Assigned dynamically	Kim Yunhee, 2021. 9. 15. PM 8:52
Edit Del Deactivate	Negotiation	Negotiation	Open	90%	Commit	Assigned dynamically	Kim Yunhee, 2021. 9. 15. PM 8:52
Edit Del Deactivate	Closed Won	Closed Won	Closed/Won	100%	Closed	Assigned dynamically	Kim Yunhee, 2021. 9. 15. PM 8:52
Edit Del Deactivate	Closed Lost	Closed Lost	Closed/Lost	0%	Omitted	Assigned dynamically	Kim Yunhee, 2021. 9. 15. PM 8:52
Edit Del Deactivate	TA	TA	Open	10%	Pipeline	Assigned dynamically	Kim Yunhee, 2021. 9. 16. AM 8:14

Reorder 을 통해 순서 재배치 가능

Opportunity Stages Picklist Values							
Action	Stage Name	API Name	Type	Probability	Forecast Category	Chart Colors	Modified By
Edit Del Deactivate	Needs Analysis	Needs Analysis	Open	35%	Pipeline	Assigned dynamically	Kim Yunhee, 2021. 9. 15. PM 8:52
Edit Del Deactivate	Proposal	Proposal	Open	75%	Best Case	Assigned dynamically	Kim Yunhee, 2021. 9. 15. PM 8:52
Edit Del Deactivate	Negotiation	Negotiation	Open	90%	Commit	Assigned dynamically	Kim Yunhee, 2021. 9. 15. PM 8:52
Edit Del Deactivate	Closed Won	Closed Won	Closed/Won	100%	Closed	Assigned dynamically	Kim Yunhee, 2021. 9. 15. PM 8:52
Edit Del Deactivate	Closed Lost	Closed Lost	Closed/Lost	0%	Omitted	Assigned dynamically	Kim Yunhee, 2021. 9. 15. PM 8:52
Edit Del Deactivate	TA	TA	Open	10%	Pipeline	Assigned dynamically	Kim Yunhee, 2021. 9. 16. AM 8:14

Picklist Edit
Stage

Select a value and use the arrows to change its placement in the list.

Help for this Page

Sort Picklist Values

Stage Name

기존 단어를 다른 단어로 대체하는 방법 (ex/ Qualification → TA 로 대체)

기존에 Sample로 있는 불필요한 Stage 한개를 선택해서 Del 클릭 → Replace value on records with: 변경하고 싶은 항목(ex/ TA) 클릭 → Save → 기존 불필요한 항목이 신규항목으로 대체됨

Object Manager

NAGER

No dependencies defined.

Validation Rules

No validation rules defined.

Opportunity Stages Picklist Values

Action	Stage Name	API Name	Type	Probability	Forecast Category	Chart Colors	Modified By
Edit Del Deactivate	Qualification	Qualification	Open	10%	Pipeline	Assigned dynamically	Kim Yunhee, 2021. 9. 15. PM 8:52
Edit Del Deactivate	Needs Analysis	Needs Analysis	Open	35%	Pipeline	Assigned dynamically	Kim Yunhee, 2021. 9. 15. PM 8:52
Edit Del Deactivate	Proposal	Proposal	Open	75%	Best Case	Assigned dynamically	Kim Yunhee, 2021. 9. 15. PM 8:52
Edit Del Deactivate	Negotiation	Negotiation	Open	90%	Commit	Assigned dynamically	Kim Yunhee, 2021. 9. 15. PM 8:52
Edit Del Deactivate	Closed Won	Closed Won	Closed/Won	100%	Closed	Assigned dynamically	Kim Yunhee, 2021. 9. 15. PM 8:52
Edit Del Deactivate	Closed Lost	Closed Lost	Closed/Lost	0%	Omitted	Assigned dynamically	Kim Yunhee, 2021. 9. 15. PM 8:52

Opportunity Stages Picklist Values Help

Object Manager

Stager

Find and Replace Value

Stage

Globally replace an existing value in a picklist with a new value. Choose a replacement value below to apply to any records that no longer contains the deleted value and records containing that value no longer display it. Use Deactivate instead of Delete if you want to keep the record but remove its value from the picklist.

Delete value 'Qualification' from picklist and... Replace value on records with TA

Save Cancel

기존 Qualification 항목을 TA로 대체하겠다는 표시 생성→ Save

Field Dependencies

No dependencies defined.

Validation Rules

No validation rules defined.

Opportunity Stages Picklist Values

New Reorder Replace Printable View Chart Colors Opportunity Stages Picklist Values Help ?

Action	Stage Name	API Name	Type	Probability	Forecast Category	Chart Colors	Modified By
Edit Del Deactivate	Needs Analysis	Needs Analysis	Open	35%	Pipeline	Assigned dynamically	Kim Yunhee, 2021. 9. 15. PM 8:52
Edit Del Deactivate	Proposal	Proposal	Open	75%	Best Case	Assigned dynamically	Kim Yunhee, 2021. 9. 15. PM 8:52
Edit Del Deactivate	Negotiation	Negotiation	Open				m Yunhee, 2021. 9. 15. PM 8:52
Edit Del Deactivate	Closed Won	Closed Won	Closed/Won				m Yunhee, 2021. 9. 15. PM 8:52
Edit Del Deactivate	Closed Lost	Closed Lost	Closed/Lost				m Yunhee, 2021. 9. 15. PM 8:52
Edit Del Deactivate	TA	TA	Open				m Yunhee, 2021. 9. 16. AM 8:14

Qualification 항목에서 TA로 대체 완료

16. 회사 브랜드 & 칼라 설정 방법

All Search Accounts and more...

Sales Home Accounts Contacts Leads Opportunities Tasks Calendar Dashboards Notes Reports Groups Forecasts More

Accounts Recently Viewed

1 item • Updated a few seconds ago

Account Name	Phone	Account Owner Alias
Acme (Sample)	(1800) 667-6398	Kim

ROUTE7

Sales Home Chatter Accounts Contacts Cases Leads Opportunities Reports Dashboards Calendar Anniversary Project Type

Accounts Recently Viewed

38 items • Updated a few seconds ago

Account Name	Type	Industry	Employees	Website
XPower	Mid-Market	Healthcare & Life Sciences	350	www.steampowercompany.net
Brenntag Pacific		Machinery	600	http://www.brenntagpacific.net
AmpTech Corporation	Enterprise	Financial Services	3,100	www.amptech.com
Allied Technologies	Enterprise	Technology	6,500	www.alliedtechnologies.com
필로로렌				
Vand Enterprises, Inc.	Small Business	Manufacturing	46	www.vandenterprise.com
Inventure, Inc.	Mid-Market	Financial Services	235	www.inventure.com
Omega Financial Services	Enterprise	Financial Services	2,300	www.unitedpartnerswashingtondc.net
Datamart, Inc.	Enterprise	Communications	2,400	www.datamart.com

Setup 버튼 클릭 → Home → Themes and Branding → New Theme → Theme name, 이미지, 칼라 설정

The screenshot shows the Salesforce Setup interface. In the top right corner, there is a dropdown menu with 'Setup' selected. Below it, there are links for 'Your Account', 'Import', 'Developer Console', and 'Edit Object'. The main content area is titled 'Themes and Branding'. On the left, there is a sidebar with 'User Interface' expanded, showing 'Themes and Branding' selected. The main table lists various themes with columns for Name, Developer Name, Description, Last Modified, Theme Type, and Active status. A red box highlights the 'New Theme' button in the top right of the table area.

Theme Details에 이름 입력, API Name은 영문으로 입력 / Branding(회사 상호명 파일 업로드) / Brand Color 설정

The screenshot shows the 'New Custom Theme' setup page. On the left, there is a sidebar with 'User Interface' expanded, showing 'Themes and Branding' selected. The main area is titled 'SETUP > THEMES AND BRANDING' and 'New Custom Theme'. It has two main sections: 'Theme Details' and 'Branding'. In 'Theme Details', there are fields for 'Theme Name' (containing 'Route7') and 'API Name' (containing 'Route7'). In 'Branding', there is a 'Brand Image (600x120 pixels)' field containing a logo with the text 'ROUTE7', a 'Brand Color' field set to '#DDBD4E', and a checkbox for 'Override accessible brand color'. At the bottom right, there are 'Cancel' and 'Save' buttons, with 'Save' highlighted by a red box.

The screenshot shows the Salesforce Home page. The top navigation bar now displays 'ROUTE7' instead of the previous theme. A yellow banner in the center of the page says '테마 변경 완료' (Theme Change Complete). The main content area shows a list of accounts under 'Recently Viewed', with columns for Account Name, Type, Industry, Employees, and Website. The first account listed is 'XPower'.

17. Activity 상세 필드값(New Task, New Event, Log a call,Email) 내용 변경, 추가, 삭제 하는 방법

Setup → Home → Global actions → New event, Layout 클릭 → 변경하고 싶은 항목 변경 → Save

(*다른 필드값 변경할 때처럼 Object manager → Field relationship 으로 들어가는 것이 아닌 Activity는 Home → Global actions로 들어가는 이유는 Activity는 Account, Contact, Lead, Opportunity 안에 모두 들어가 있는 글로벌 항목이기 때문임)

Action	Label	Name	Description	Target Object	Type	Content Source	Icon
Edit Del Layout	Email	SendEmail			Email	Action Layout Editor	
Edit Del Layout	Follow Up	Follow_Up		Task	Create a Record	Action Layout Editor	
Edit Del Layout	Log a Call	LogACall			Log a Call	Action Layout Editor	
Edit Del Layout	New Account	NewAccount		Account	Create a Record	Action Layout Editor	
Edit Del Layout	New Case	NewCase		Case	Create a Record	Action Layout Editor	
Edit Del Layout	New Contact	NewContact		Contact	Create a Record	Action Layout Editor	
Edit Del Layout	New Event	NewEvent		Event	Create a Record	Action Layout Editor	
Edit Del Layout	New Group	NewGroup		Group	Create a Record	Action Layout Editor	
Edit Del Layout	New Lead	NewLead		Lead	Create a Record	Action Layout Editor	
Edit Del Layout	New Opportunity	NewOpportunity		Opportunity	Create a Record	Action Layout Editor	
Edit Del Layout	New Task	NewTask		Task	Create a Record	Action Layout Editor	

