bank

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Custom Object Definition Edit

[Save] [Save & New] [Cancel]

Custom Object Information

= Required 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: [bank]   Example: Account

Plural Label: [bank]   Example: Accounts

Starts with vowel sound: ☐

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

Object Name: [bank]   Example: Account

Description:
[   ]

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

Content Name: --None--

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name: [bank Name]   Example: Account Name

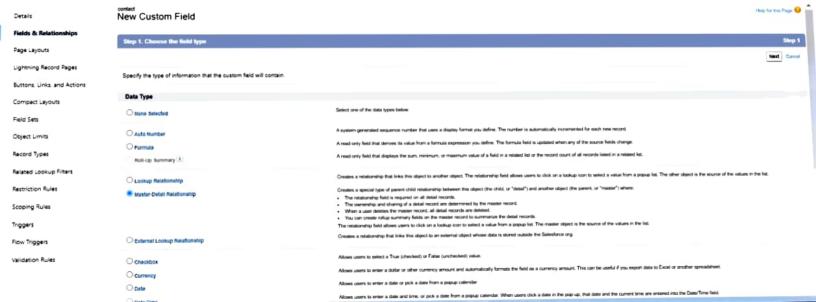Data Type: [Text ▾]

Optional Features

☐ Allow Reports

New Custom Object

Custom Object Definition Edit   Save | Save & New | Cancel

Custom Object Information

|| = Required Information

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

Label	contact	Example: **Account**
Plural Label	contact	Example: **Accounts**
Starts with vowel sound	☐	

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

| Object Name | contact | Example: **Account** |

| Description | [   ] |

Context-Sensitive Help Setting	● Open the standard Salesforce.com Help & Training window
	○ Open a window using a Visualforce page
Content Name	--None-- ∨

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

| Record Name | contact Name | Example: **Account Name** |
| Data Type | Text ∨ | |

Optional Features

☐ Allow Reports
☐ Allow Activities

Details

Edit | Delete

Description

API Name
bank__c

Custom
✓

Singular Label
bank

Plural Label
bank

Enable Reports

Track Activities

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

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Edit   Delete

Description

API Name
contact__c

Enable Reports

Custom
✓

Track Activities

Singular Label
contact

Track Field History

Plural Label
contact

Deployment Status
Deployed

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Standard salesforce.com Help Window

Fields & Relationships
4 Items. Sorted by Field Label

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| Quick Find | New | Deleted Fields | Field Dependencies | Set History Tracking |

FIELD LABEL ▲	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED	
contact Name	Name	Text(80)		✓	▾
Created By	CreatedById	Lookup(User)			
Last Modified By	LastModifiedById	Lookup(User)			
Owner	OwnerId	Lookup(User Group)		✓	

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contact
New Custom Field

Step 1. Choose the field type	Step 1

Next   Cancel

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

Data Type

Select one of the data types below.

○ None Selected

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

○ Formula   A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

  ☐ Roll-Up Summary ⓘ   A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

○ Lookup Relationship   Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

● Master-Detail Relationship   Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:
  - The relationship field is required on all detail records.
  - The ownership and sharing of a detail record are determined by the master record.
  - When a user deletes the master record, all detail records are deleted.
  - You can create rollup summary fields on the master record to summarize the detail records.
  The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

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

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

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

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

○ Date/Time   Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.

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New Relationship

Step 2. Choose the related object

Step 2 of 6

Previous | Next | Cancel

Select the other object to which this object is related

Related To [bank ▾]

Previous | Next | Cancel

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New Relationship

Step 4. Establish field-level security for reference field

Previous | Next | Cancel

Field Label	bank
Data Type	Master-Detail
Field Name	bank
Description	

These are the field-level settings for a Master-Detail relationship. They cannot be changed.

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	✔	
Analytics Cloud Security User	✔	
Authenticated Website	✔	
Authenticated Website	✔	
B2B Reordering Portal Buyer Profile	✔	
Contract Manager	✔	
Cross Org Data Proxy User	✔	
Custom: Marketing Profile	✔	
Custom: Sales Profile	✔	
Custom: Support Profile	✔	
Customer Community Login User	✔	
Customer Community Plus Login User	✔	
Customer Community Plus User	✔	
Customer Community User	✔	

Top Results			
Users			
Profiles			
Permission Sets			
Objects			
Fields			
Groups and Queues			
> Show More			

Objects

1 Result

NAME	TYPE	OBJECT	LAST MODIFIED DATE	LAST MODIFIED BY
				Bhuvaneshwari V
bank	Object		29/10/2023	

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New Relationship

Step 6. Add custom related lists	Step 6 of 6

Previous | Save & New | Save | Cancel

Field Label	bank
Data Type	Master-Detail
Field Name	bank
Description	

Specify the title that the related list will have in all of the layouts associated with the parent.

Related List Label [customer]

These are the page layouts that will include this field. Because this is a Master-Detail relationship, the field is required.

Add Related List	Page Layout Name
☑	bank Layout

☑ Append related list to users' existing personal customizations

Previous | Save & New | Save | Cancel

	Customer Community User	
Details	Customer Portal Manager Custom	✔
	Customer Portal Manager Standard	✔
Fields & Relationships	External Apps Login User	✔
	External Identity User	✔
Page Layouts	Force.com - App Subscription User	✔
	Force.com - Free User	✔
Lightning Record Pages	Gold Partner User	✔
	High Volume Customer Portal	✔
Buttons, Links, and Actions	High Volume Customer Portal User	✔
	Identity User	✔
Compact Layouts	Marketing User	✔
	Minimum Access - Salesforce	✔
Field Sets	Partner App Subscription User	✔
	Partner Community Login User	✔
Object Limits	Partner Community User	✔
	Read Only	✔
Record Types	Salesforce API Only System Integrations	✔
	Silver Partner User	✔
Related Lookup Filters	Solution Manager	✔
	Standard Platform User	✔
Restriction Rules	Standard User	✔
	System Administrator	✔
Scoping Rules	Work.com Only User	✔
Triggers		
Flow Triggers		
Validation Rules		

Previous · Next · Cancel

Page Layouts
1 Items, Sorted by Page Layout Name

New | Page Layout Assignment

PAGE LAYOUT NAME ▲	CREATED BY	MODIFIED BY	
consumer Layout	Bhuvaneshwari V, 28/10/2023, 12:45 pm	Bhuvaneshwari V, 28/10/2023, 12:45 pm	▾

Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Custom Object Tabs   New   What Is This?

Action	Label	Tab Style	Description
Edit | Del	bank	Bank	
Edit | Del	Colleges	Airplane	
Edit | Del	Consumers	Bank	
Edit | Del	Departments	Airplane	
Edit | Del	Managements	Bank	
Edit | Del	providers	Airplane	

Web Tabs   New   What Is This?

No Web Tabs have been defined

Visualforce Tabs   New   What Is This?

No Visualforce Tabs have been defined

Lightning Component Tabs   New   What Is This?

No Lightning component tabs have been defined

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New Relationship

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

Previous   Next   Cancel

Field Label bank

Field Name bank

Description

Help Text

Child Relationship Name customer

Sharing Setting Select the minimum access level required on the Master record to create, edit, or delete related Detail records.
○ Read Only: Allows users with at least Read access to the Master record to create, edit, or delete related Detail records.

● Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.

Allow reparenting ☐ Child records can be reparented to other parent records after they are created

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!

▶ Show Filter Settings

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Previous Next Cancel

Field Label	bank
Data Type	Master-Detail
Field Name	bank
Description	

These are the page layouts that will include this field. Because this is a Master-Detail relationship, the field is required.

Add Field	Page Layout Name
✓	contact Layout

Previous Next Cancel

Profiles

All Profiles ∨   Edit | Delete | Create New View

New Profile   🔄

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
☐	Edit	Clone	Analytics Cloud Integration User	Analytics Cloud Integration User	
☐	Edit	Clone	Analytics Cloud Security User	Analytics Cloud Integration User	
☐	Edit	Clone	Authenticated Website	Authenticated Website	
☐	Edit	Clone	Authenticated Website	Authenticated Website	
☐	Edit	Del I...	B2B Reordering Portal Buyer Profile	External Apps Login	✓
☐	Edit	Clone	Chatter External User	Chatter External	
☐	Edit	Clone	Chatter Free User	Chatter Free	
☐	Edit	Clone	Chatter Moderator User	Chatter Free	
☐	Edit	Clone	Contract Manager	Salesforce	
☐	Edit	Clone	Cross Org Data Proxy User	XOrg Proxy User	
☐	Edit	Del I...	Custom Marketing Profile	Salesforce	✓
☐	Edit	Del I...	Custom Sales Profile	Salesforce	✓
☐	Edit	Del I...	Custom Support Profile	Salesforce	✓
☐	Edit	Clone	Customer Community Login User	Customer Community Login	
☐	Edit	Clone	Customer Community Plus Login User	Customer Community Plus Login	
☐	Edit	Clone	Customer Community Plus User	Customer Community Plus	
☐	Edit	Clone	Customer Community User	Customer Community	
☐	Edit	Clone	Customer Portal Manager Custom	Customer Portal Manager Custom	
☐	Edit	Clone	Customer Portal Manager Standard	Customer Portal Manager Standard	

◀ ◀ Previous   Next ▶ ▶

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