

WhatsApp

New Custom Object | Salesforce

+

avsenineeringcollege-9a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new

Search Setup

12

Setup

Home

Object Manager

SETUP

New Custom Object

New Custom Object

Help for this Page

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

Custom Object Definition Edit

Save Save & New Cancel

Custom Object Information

Required Information

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

Label

Customer

Example: Account

Plural Label

Customers

Example: Accounts

Starts with vowel sound

☐

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

Object Name

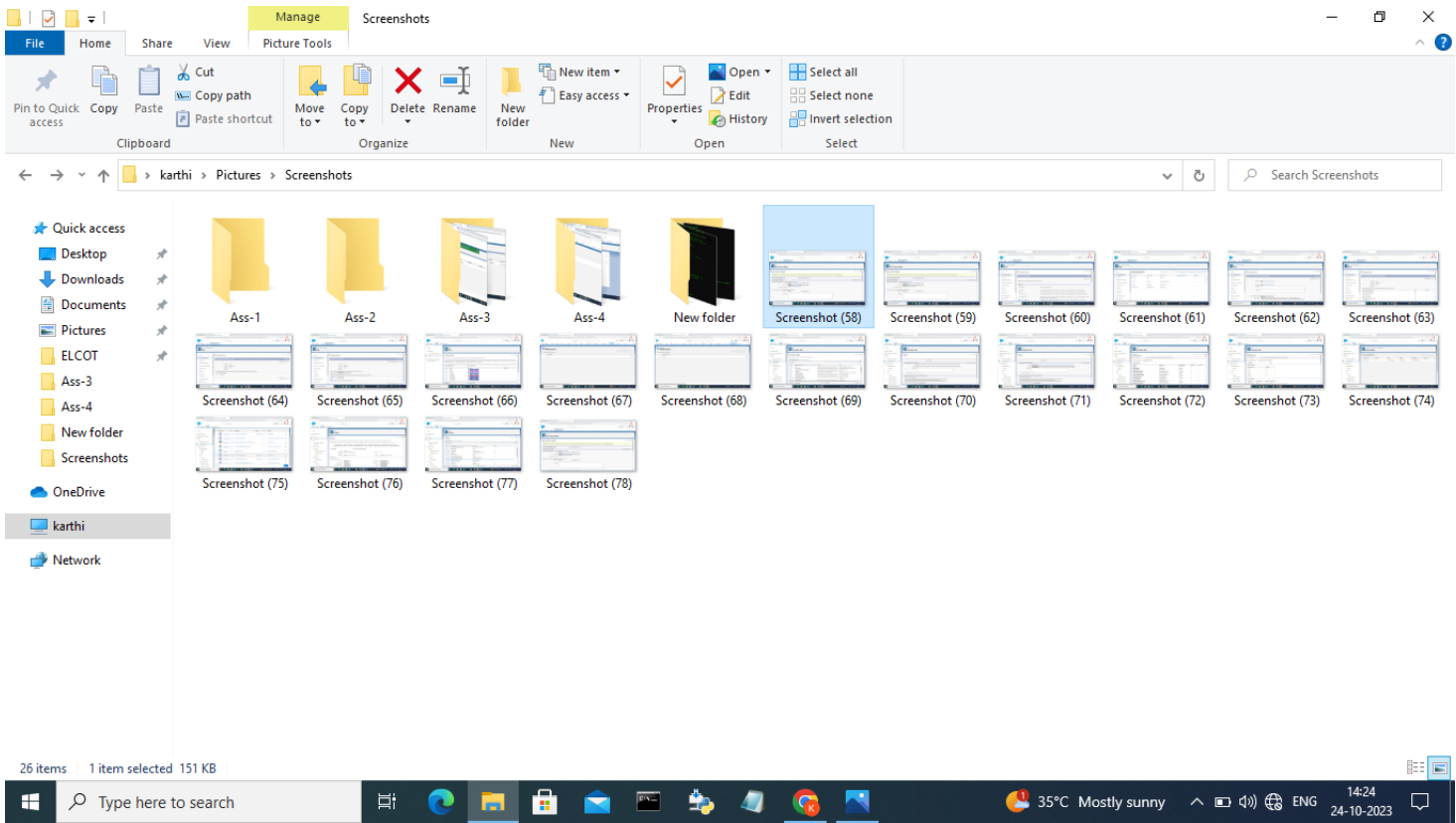
Customer

Example: Account

Description

Context Sensitive Help Settings

Open the standard Salesforce.com Help & Training window



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New Custom Object | Salesforce

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Search Setup

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Object Manager

SETUP

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Custom Object Definition Edit

Save Save & New Cancel

Custom Object Information

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

Label

Bank

Example: Account

Plural Label

Banks

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 Settings

Open the standard Salesforce.com Help & Training window

(3) WhatsApp

Profiles | Salesforce

avsenineeringcollege-9a-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/home

Search Setup

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pro

Hyperforce Assistant

Users

Profiles

Data

Mass Transfer Approval Requests

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Data.com

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Prospector Users

Functions

Marketing

Lead Processes

Sales

Products

Asset Settings

SETUP

Profiles

Profiles

Help for this Page

All Profiles

Edit

Delete

Create New View

New Profile

A

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Other

All

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit Clone	High Volume Customer Portal User	High Volume Customer Portal	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Identity User	Identity	<input type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Management	Salesforce Platform	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Manager	Analytics Cloud Integration User	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Clone	Marketing User	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Minimum Access - Salesforce	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Partner App Subscription User	Partner App Subscription	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Partner Community Login User	Partner Community Login	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Partner Community User	Partner Community	<input type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Read Only	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Sales manager	Salesforce Platform	<input checked="" type="checkbox"/>

26-43 of 43

0 Selected

PreviousNext

Page 2 of 2

Type here to search

33°C Mostly sunny

13:52 24-10-2023

(2) WhatsApp

Permission Sets | Salesforce

+

avseengineeringcollege-9a-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/0PS5j000006fkYQ/PermissionSetAssignment/new

Search Setup

12

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Lightning Experience Transition Assistant

Users

Permission Set Groups

Permission Sets

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Digital Experiences

Settings

Functions

Sales

Accounts

Person Accounts

Salesforce Scheduler

Assignment Policies

Salesforce Scheduler

1 item selected

	Full Name ↑	AI...	Username	Role	A...	Profile	
<input type="checkbox"/>	1.Manager m1b	1m1ba	manager1.mnop@gmail.com	Marketing Tea...	<input checked="" type="checkbox"/>	Management	▼
<input type="checkbox"/>	2.Manager m2b	2m2ba	manager2.qrst@gmail.com		<input checked="" type="checkbox"/>	Salesforce API Only System Integrations	▼
<input type="checkbox"/>	Chatter Expert	Chatter	chatty.00d5j00000dq7kweal.ok2h1obsfnak@cha...		<input checked="" type="checkbox"/>	Chatter Free User	▼
<input type="checkbox"/>	Integration User	integ	integration@00d5j00000dq7kweal.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User	▼
<input type="checkbox"/>	Karthiga S	KS	karthiga@karthi.com		<input checked="" type="checkbox"/>	System Administrator	▼
<input checked="" type="checkbox"/>	manager Bank	mbank	manager.yyyx@gmail.com	Marketing Tea...	<input checked="" type="checkbox"/>	Management	▼
<input type="checkbox"/>	Manager Sales	msale	salesmanager0987@gmail.com	Marketing Tea...	<input checked="" type="checkbox"/>	Partner App Subscription User	▼
<input type="checkbox"/>	Security User	sec	insightssecurity@00d5j00000dq7kweal.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User	▼

Cancel

Next

Type here to search

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Permission Sets | Salesforce

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Person Accounts

Salesforce Scheduler

Assignment Policies

... > SETUP > PERMISSION SET 'SALESMANAGER'

Salesmanager

Current Assignments

Full Name ↑

Active

Role

Profile

User License

Expires On

manager Bank

✓

Marketing Team

Management

Salesforce Platform

✎

🗑

Add Assignment

https://avsenengineeringcollege-9a-dev-ed.develop.my.salesforce.com/one/one.app...

Type here to search

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24-10-2023

(1) WhatsApp

Permission Sets | Salesforce

avseengineeringcollege-9a-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0PS5j000006fkYQ%3Fs%3DEntityPermissions%26o%3DAcc...

Search Setup

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⚙️

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Person Accounts

Salesforce Scheduler

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SETUP

Permission Sets

Permission Set

Salesmanager

Video Tutorial | Help for this Page

Find Settings...

Clone

Edit Properties

Manage Assignments

View Summary (Beta)

Permission Set Overview

Object Settings

Accounts

Accounts

Edit

Object Permissions

Permission Name	Enabled
Read	<input checked="" type="checkbox"/>
Create	<input type="checkbox"/>
Edit	<input type="checkbox"/>
Delete	<input type="checkbox"/>
View All	<input checked="" type="checkbox"/>
Modify All	<input type="checkbox"/>

Field Permissions

Field Name	Field API Name	Read Access	Edit Access
Account Name	Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

https://avseengineeringcollege-9a-dev-ed.develop.my.salesforce.com/one/one.app#/alohaRedirect/0PS5j000006fkYQ?s=EntityPermissions&o=Account&isdt=p1

Type here to search

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Permission Sets | Salesforce

avsenengineeringcollege-9a-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0P5J%000006fkYQ%3Fs%3DEntityPermissions

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Star Plus Help Settings 12

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Salesforce Scheduler

Assignment Policies

SETUP

Permission Sets

Permission Set Salesmanager

Find Settings... Clone Edit Properties Manage Assignments View Summary (Beta)

Permission Set Overview Object Settings

Object Name	Object API Name	Object Permissions	Total Fields	Tab Settings
Accounts	Account	Read, View All	40	--
AI Insight Reasons	AIInsightReason	No Access	--	--
AI Record Insights	AIRecordInsight	No Access	--	--
Alternative Payment Methods	AlternativePaymentMethod	No Access	27	--
API Anomaly Event Stores	ApiAnomalyEventStore	No Access	14	--
App Analytics Query Requests	AppAnalyticsQueryRequest	No Access	--	--
Application Usage Assignments	AppUsageAssignment	No Access	--	--
Appointment Categories	AppointmentCategory	No Access	3	--
Appointment Invitations	AppointmentInvitation	No Access	17	--
Appointment Invitees	AppointmentInvitee	--	4	--
Appointment Schedule Aggregates	AppointmentScheduleAggr	No Access	--	--
Appointment Schedule Logs	AppointmentScheduleLog	No Access	--	--

Type here to search

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Permission Sets | Salesforce

avseengineeringcollege-9a-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2Fudd%2FPermissionSet%2FnewPermissionSet.apexp

Search Setup

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Salesforce Scheduler

SETUP

Permission Sets

Permission Set

Create

Help for this Page

Save

Cancel

Enter permission set information

Required Information

Label

Salesmanager

API Name

Salesmanager

Description

Session Activation Required

☐

Select the type of users who will use this permission set

Who will use this permission set?

-Choose "--None--" if you plan to assign this permission set to multiple users with different user and permission set licenses.

-Choose a specific user license if you want users with only one license type to use this permission set.

-Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.

Not sure what a permission set license is? [Learn more here.](#)

Type here to search

Result

13:28

24-10-2023

(1) WhatsApp

Permission Sets | Salesforce

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avseengineeringcollege-9a-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2Fudd%2FPermissionSet%2FnewPermissionSet.apexp

Search Setup

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Salesforce Scheduler

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SETUP

Permission Sets

Permission Set

Create

Help for this Page

Save

Cancel

Enter permission set information

Required Information

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Session Activation Required

Select the type of users who will use this permission set

Who will use this permission set?

-Choose "--None--" if you plan to assign this permission set to multiple users with different user and permission set licenses.

-Choose a specific user license if you want users with only one license type to use this permission set.

-Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.

Not sure what a permission set license is? [Learn more here.](#)

Type here to search

Result

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24-10-2023

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WhatsApp

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Permission Sets | Salesforce

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avsenengineeringcollege-9a-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/home

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(1) WhatsApp

Recently Viewed | Customers | S

avsenengineeringcollege-9a-dev-ed.develop.lightning.force.com/lightning/o/Custom_c/list?filterName=Recent

Search...

★

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12

Service

Home

Chatter

Accounts

Contacts

Cases

Reports

Dashboards

colleges

departments

Banks

Customers

More

Customers

Recently Viewed

New

Import

1 item • Updated a few seconds ago

Customer Name

1

Karthiga

https://avsenengineeringcollege-9a-dev-ed.develop.lightning.force.com/lightning/o/...

Type here to search

Result

13:27

24-10-2023

(1) WhatsApp

Recently Viewed | Banks | Salesf...

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avsenengineeringcollege-9a-dev-ed.develop.lightning.force.com/lightning/o/Bank_c/list?filterName=Recent

⌕ Search...

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12

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Service

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Chatter

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colleges

departments

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Customers

More

Banks

Recently Viewed

New

Import

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1 item • Updated a few seconds ago

<input type="checkbox"/>	Bank Name	
1	<input type="checkbox"/> SBI	

https://avsenengineeringcollege-9a-dev-ed.develop.lightning.force.com/lightning/o/...

Type here to search

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High UV

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24-10-2023

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Tabs | Salesforce

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Search Setup

⌵ + ? ⚙ 12

Setup

Home

Object Manager

tabs

User Interface

Rename Tabs and Labels

⌵

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

SETUP

Tabs

Custom Tabs

Help for this Page

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

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

Custom Object Tabs

New

What Is This?

Action	Label	Tab Style	Description
Edit Del	Banks	Bridge	
Edit Del	colleges	Books	
Edit Del	Customers	Camera	
Edit Del	departments	Alarm clock	
Edit Del	Managements	Flag	
Edit Del	Survey Results	Helicopter	

Web Tabs

New

What Is This?

https://avseengineeringcollege-9a-dev-ed.develop.lightning.force.com/one/one.ap...

Type here to search

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Bank | Salesforce

avsenengineeringcollege-9a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I5j000002NudE/FieldsAndRelationships/new

Search Setup

Star

Share

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12

Avatar

Setup

Home

Object Manager

Bank

SETUP > OBJECT MANAGER

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Bank

New Relationship

Help for this Page

Step 6. Add custom related lists

Step 6 of 6

PreviousSave & NewSaveCancel

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 LabelCustomer

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
<input checked="" type="checkbox"/>	Customer Layout

☒ Append related list to users' existing personal customizations

PreviousSave & NewSaveCancel

Type here to search

Task View

Edge

File Explorer

Calendar

Mail

Photos

Shopping

Maps

Settings

Chrome

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24-10-2023

ENG

Setup

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Object Manager

SETUP > OBJECT MANAGER

Bank

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Bank

New Relationship

Help for this Page

Step 5. Add reference field to Page Layouts

Step 5 of 6

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

☒

Bank Layout

Previous

Next

Cancel

Type here to search

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Setup

Home

Object Manager

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SETUP > OBJECT MANAGER

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Bank

New Relationship

Help for this Page

Step 4. Establish field-level security for reference field

Step 4 of 6

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	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Authenticated Website	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Authenticated Website	<input checked="" type="checkbox"/>	<input type="checkbox"/>
B2B Reordering Portal Buyer Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Type here to search

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(1) WhatsApp

Bank | Salesforce

avsenengineeringcollege-9a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115j000002NudE/FieldsAndRelationships/new

Search Setup

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Avatar

Setup

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SETUP > OBJECT MANAGER

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Buttons, Links, and Actions

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Restriction Rules

Bank

New Relationship

Help for this Page

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

Step 3 of 6

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.

Type here to search

Task View

Edge

File Explorer

Calendar

Mail

PowerToys

Visual Studio Code

Chrome

33°C

Partly sunny

ENG

13:23

24-10-2023

The screenshot shows the Salesforce Lightning Setup interface. The top navigation bar includes the Salesforce logo, a search bar, and various utility icons. The main header displays the breadcrumb 'SETUP > OBJECT MANAGER' and the 'Bank' object. The left sidebar contains a list of setup options, with 'Fields & Relationships' selected. The main content area is titled 'Fields & Relationships' and shows a table of fields for the 'Bank' object. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. Four fields are listed: Bank Name, Contact, Created By, and Last Modified By. The URL in the address bar is 'https://avsengineeringcollege-9a-dev-ed.develop.lightning.force.com/one/app#/setup/ObjectManager/0115j000002NudE/FieldsAndRelationships/view'.

Fields & Relationships
4 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Bank Name	Name	Text(80)		✓
Contact	Contact__c	Master-Detail(Contact)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		

WhatsApp

Bank | Salesforce

avsenengineeringcollege-9a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I5j000002NudE/FieldsAndRelationships/new

Search Setup

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Help

Settings

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Avatar

Setup

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New Custom Field

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Step 1. Choose the field type

Step 1

Next

Cancel

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

Data Type

☐ None Selected

Select one of the data types below.

☐ Auto Number

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

☐ Formula

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

☐ Roll-Up Summary

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

☐ Lookup Relationship

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

☒ 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.

Type here to search

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24-10-2023