



Search Setup



Setup

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Object Manager

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Multi-Factor Authentication Assistant

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SETTINGS

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SETUP
Home

Create



Get Started with Einstein Bots

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

Get Started



Mobile Publisher

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

Learn More



Real-time Collaborative Docs

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

Get Started

Most Recently Used

10 items

NAME	TYPE	OBJECT
Manager sales	User	
Bank_c	Custom Field Definition	Account
Number of Locations	Custom Field Definition	Account
Customer Priority	Custom Field Definition	Account
Active	Custom Field Definition	Account
Bank	Custom Field Definition	Account
SLA	Custom Field Definition	Account
SLA Expiration Date	Custom Field Definition	Account
Bank	Custom Object Definition	
college	Custom Object Definition	



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

College

Example: Account

Plural Label

Colleges

Example: Accounts

Starts with vowel sound

☐

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

Object Name

College

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

College Name

Example: Account Name

Data Type

Text

Optional Features

- ☐ Allow Reports
- ☐ Allow Activities
- ☐ Track Field History
- ☐ Allow in Chatter Groups
- ☐ Enable Licensing [i](#)

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more.](#)

- ☒ Allow Sharing
- ☒ Allow Bulk API Access
- ☒ Allow Streaming API Access

Deployment Status

[What is this?](#)

- ☐ In Development
- ☒ Deployed

Search Status

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

- ☐ Allow Search

Object Creation Options (Available only when custom object is first created)

- ☐ Add Notes and Attachments related list to default page layout

User Profiles

Choose the user profiles that can access this app.

Available Profiles

System admi

Selected Profiles

System Administrator



New Lightning App

Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

Available Items

↺

Create ▾

🔍 Type to filter list...

✕

📁

Accounts

🔔

Alert Settings

📄

All Sites

💳

Alternative Payment ...

📊

Analytics

🎮

App Launcher

📅

Appointment Categori...

📅

Appointment Invitations

👤

Approval Requests

📁

Asset Action Sources

Selected Items

▶

◀

No items selected

▲

▼

Utility Items (Desktop Only)

Give your users quick access to productivity tools and add background utility items to your app.

Add Utility Item

Utility Bar
Background
Alignment
Content

The utility bar is a fixed footer that opens components in docked panels. Available only when the app is viewed in Lightning Experience on a desktop.



To enable the utility bar for this app, add a utility item.

Standard navigation shows items in a navigation bar at the top of the page. Console navigation shows a list of records in a sidebar and opens each record in a new workspace tab. Also, you can select the form factors where this app is available.

App Options

Navigation and Form Factor



* Navigation Style

- ☒ Standard navigation
- ☐ Console navigation

* Supported Form Factors

- ☒ Desktop and phone
- ☐ Desktop
- ☐ Phone

Setup and Personalization

Setup Experience

- ☒ Setup (full set of Setup options)
- ☐ Service Setup

App Personalization Settings

- ☐ Disable end user personalization of nav items in this app
- ☐ Disable temporary tabs for items outside of this app

New Lightning App

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

* App Name ⓘ

* Developer Name ⓘ

Description ⓘ

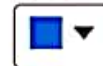
App Branding

Image ⓘ



Primary Color Hex

Value ⓘ



#0070D2

Org Theme Options

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

App Launcher Preview





SETUP

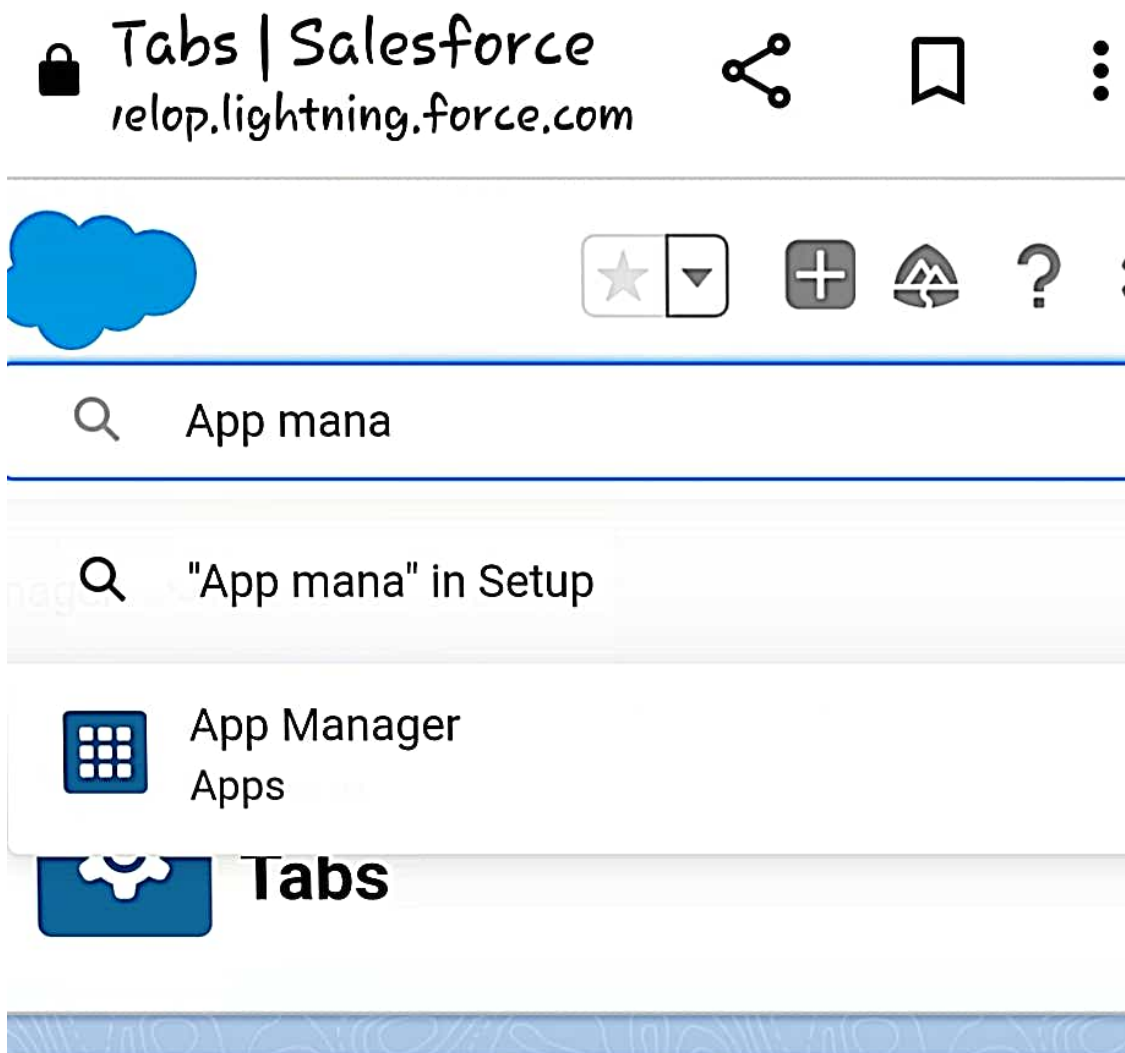
Lightning Experience App Manager

[New Lightning App](#)[New Connected App](#)

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



	App Name ↑ ▾	Developer N... ▾	Description ▾	Last Modifi... ▾	App ... ▾	Vi... ▾	
1	All Tabs	AllTabSet		17/10/2023, 10...	Classic		▾
2	Analytics Studio	Insights	Build CRM Anal...	17/10/2023, 10...	Classic	✓	▾
3	App Launcher	AppLauncher	App Launcher t...	17/10/2023, 10...	Classic	✓	▾
4	AVS Engineerin...	Deepika	Teaching the a...	17/10/2023, 2:...	Lightning	✓	▾
5	AVS Engineerin...	DeepikaK	Teaching acad...	17/10/2023, 2:...	Lightning	✓	▾
6	Bolt Solutions	LightningBolt	Discover and ...	17/10/2023, 10...	Lightning	✓	▾
7	Community	Community	Salesforce CR...	17/10/2023, 10...	Classic	✓	▾
8	Content	Content	Salesforce CR...	17/10/2023, 10...	Classic	✓	▾
9	Data Manager	DataManager	Use Data Mana...	17/10/2023, 10...	Lightning	✓	▾
10	Digital Experien...	SalesforceCMS	Manage conte...	17/10/2023, 10...	Lightning	✓	▾
11	Lightning Usag...	LightningInstru...	View Adoption ...	17/10/2023, 10...	Lightning	✓	▾
12	Marketing	Marketing	Best-in-class o...	17/10/2023, 10...	Classic	✓	▾
13	Platform	Platform	The fundament...	17/10/2023, 10...	Classic		▾
14	Queue Manage...	QueueManage...	Create and ma...	17/10/2023, 10...	Lightning	✓	▾
15	Sales	Sales	The world's mo...	17/10/2023, 10...	Classic		▾
16	Sales	LightningSales	Manage your s...	17/10/2023, 10...	Lightning	✓	▾
17	Sales Console	LightningSales...	(Lightning Exp...	17/10/2023, 10...	Lightning	✓	▾
18	Salesforce Cha...	Chatter	The Salesforce...	17/10/2023, 10...	Classic	✓	▾
19	Salesforce Sch...	LightningSched...	Set up persona...	17/10/2023, 10...	Lightning	✓	▾
20	Service	Service	Manage custo...	17/10/2023, 10...	Classic	✓	▾
21	Service Console	LightningService	(Lightning Exp...	17/10/2023, 10...	Lightning	✓	▾
22	Site.com	Sites	Build pixel-perf...	17/10/2023, 10...	Classic		▾
23	Subscription M...	RevenueCloudC...	Get started aut...	17/10/2023, 10...	Lightning	✓	▾



Custom Tabs

You can create new custom tabs to add new functionality or to build new





Custom Object tabs look and act like standard tabs provided with Salesforce. They can embed external web applications or Visualforce pages. Custom tabs allow you to add Lightning

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	Banks	 Globe	
Edit Del	colleges	 Fan	
Edit Del	Customers	 Lightning	
Edit Del	departments	 Fan	
Edit Del	Informations	 Leaf	

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

Lightning Page Tabs
[New](#) [What Is This?](#)

No Lightning Page Tabs have been defined



Search



"Tabs" in Setup



"Tabs" in Objects



Tabs
Object • User Interface



Rename Tabs and Labels
Object • User Interface

Step 1. Choose the field type

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

Data Type



None Selected

Select one of the data types



Auto Number

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



Formula

A read-only field that derives its value from a formula expression you create. The field is updated when any field in the formula changes.



Roll-Up Summary 

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



Lookup Relationship

Creates a relationship that links to a record in another object.



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

Scoping Rules

Triggers

Flow Triggers

Validation Rules

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

☐ None Selected

Select one of the data types below.

☐ Auto Number

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

☐ Formula

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

☐ Roll-Up Summary ⓘ

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

☐ Lookup Relationship

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

☒ Master-Detail Relationship

Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is required on all detail records.
- The 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.

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.

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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.

☐ Email

Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.

☐ Geolocation

Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.

☐ Number

Allows users to enter any number. Leading zeros are removed.

☐ Percent

Allows users to enter a percentage number, for example, "10" and automatically adds the percent sign to the number.

☐ Phone

Allows users to enter any phone number. Automatically formats it as a phone number.

☐ Picklist

Allows users to select a value from a list you define.

☐ Picklist (Multi-Select)

Allows users to select multiple values from a list you define.

☐ Text

Allows users to enter any combination of letters and numbers.

☐ Text Area

Allows users to enter up to 255 characters on separate lines.

☐ Text Area (Long)

Allows users to enter up to 131,072 characters on separate lines.

☐ Text Area (Rich)

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

☐ Text (Encrypted) ⓘ

Allows users to enter any combination of letters and numbers and store them in encrypted form.

☐ Time

Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:50.600" are all valid times for this field.

☐ URL

Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

Next

Cancel



Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Hierarchy Columns

Scoping Rules

Triggers

Flow Triggers

Validation Rules

Fields

New

Deleted Fields

Field Dependencies

Set History Tracking

34+ Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Account Name	Name	Name		✓
Account Name	Name	Text(255)		
Account Number	AccountNumber	Text(40)		
Account Owner	OwnerId	Lookup(User)		✓
Account Site	Site	Text(80)		
Account Source	AccountSource	Picklist		
Active	Active__c	Picklist		
Annual Revenue	AnnualRevenue	Currency(18, 0)		
Bank	Bank__c	Phone		
Bank_c	Bank_c__c	Phone		
Billing Address	BillingAddress	Address		
Clean Status	CleanStatus	Picklist		✓
Created By	CreatedById	Lookup(User)		
Customer Priority	CustomerPriority__c	Picklist		
D&B Company	DandbCompanyId	Lookup(D&B Company)		✓
D-U-N-S Number	DunsNumber	Text(9)		
Data.com Key	Jigsaw	Text(20)		
Description	Description	Long Text Area(32000)		
Einstein Account Tier	Tier	Text(2)		
Employees	NumberOfEmployees	Number(8, 0)		
Fax	Fax	Fax		
Industry	Industry	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
NAICS Code	NaicsCode	Text(8)		
NAICS Description	NaicsDesc	Text(120)		
Number of Locations	NumberOfLocations__c	Number(3, 0)		
Operating Hours	OperatingHoursId	Lookup(Operating Hours)		✓
Ownership	Ownership	Picklist		

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
- Scoping Rules
- Triggers
- Flow Triggers
- Validation Rules

Details

EditDelete

Description

API Name

Department_c_c

Custom

✓

Singular Label

Department_c

Plural Label

Departments_c

Enable Reports

Track Activities

Track Field History

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window



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 Example: AccountPlural Label Example: AccountsStarts with vowel sound ☐

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

Object Name Example: Account

Description

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

Enter Record Name Label and Format

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

Record Name Example: Account NameData Type

Optional Features

- ☐ Allow Reports
- ☐ Allow Activities
- ☐ Track Field History
- ☐ Allow in Chatter Groups
- ☐ Enable Licensing [i](#)

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more.](#)

- ☒ Allow Sharing
- ☒ Allow Bulk API Access
- ☒ Allow Streaming API Access

Deployment Status

[What is this?](#)

- ☐ In Development
- ☒ Deployed

Search Status

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

- ☐ Allow Search

Object Creation Options (Available only when custom object is first created)

- ☐ Add Notes and Attachments related list to default page layout
- ☐ Launch New Custom Tab Wizard after saving this custom object

Save

Save & New

Cancel

Details

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Details

Edit

Delete

Description

API Name

College_c__c

Custom



Singular Label

College _c

Plural Label

Colleges

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Help Settings

Standard salesforce.com Help Window