



SETUP

New Custom Object

New Custom Object

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

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

Label Example: Account

Plural Label Example: Accounts

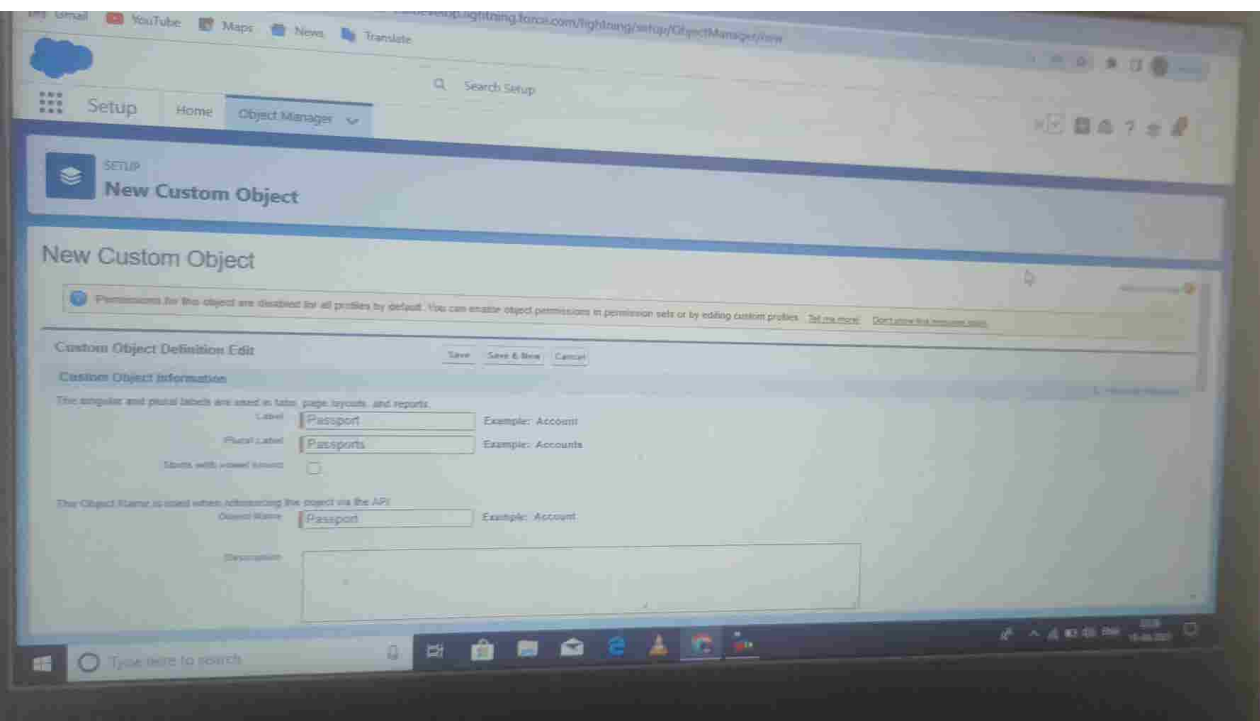
Starts with vowel sound ☐

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

Object Name Example: Account

Description





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New Custom Object

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by setting custom profiles. [Learn more](#) [Get help with permissions](#)

Custom Object Definition Edit

Save Save & New Cancel

Custom Object Information

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

Label

Visa slot

Example: New slot

Plural Label

Visa slots

Example: New slots

Starts with vowel sound

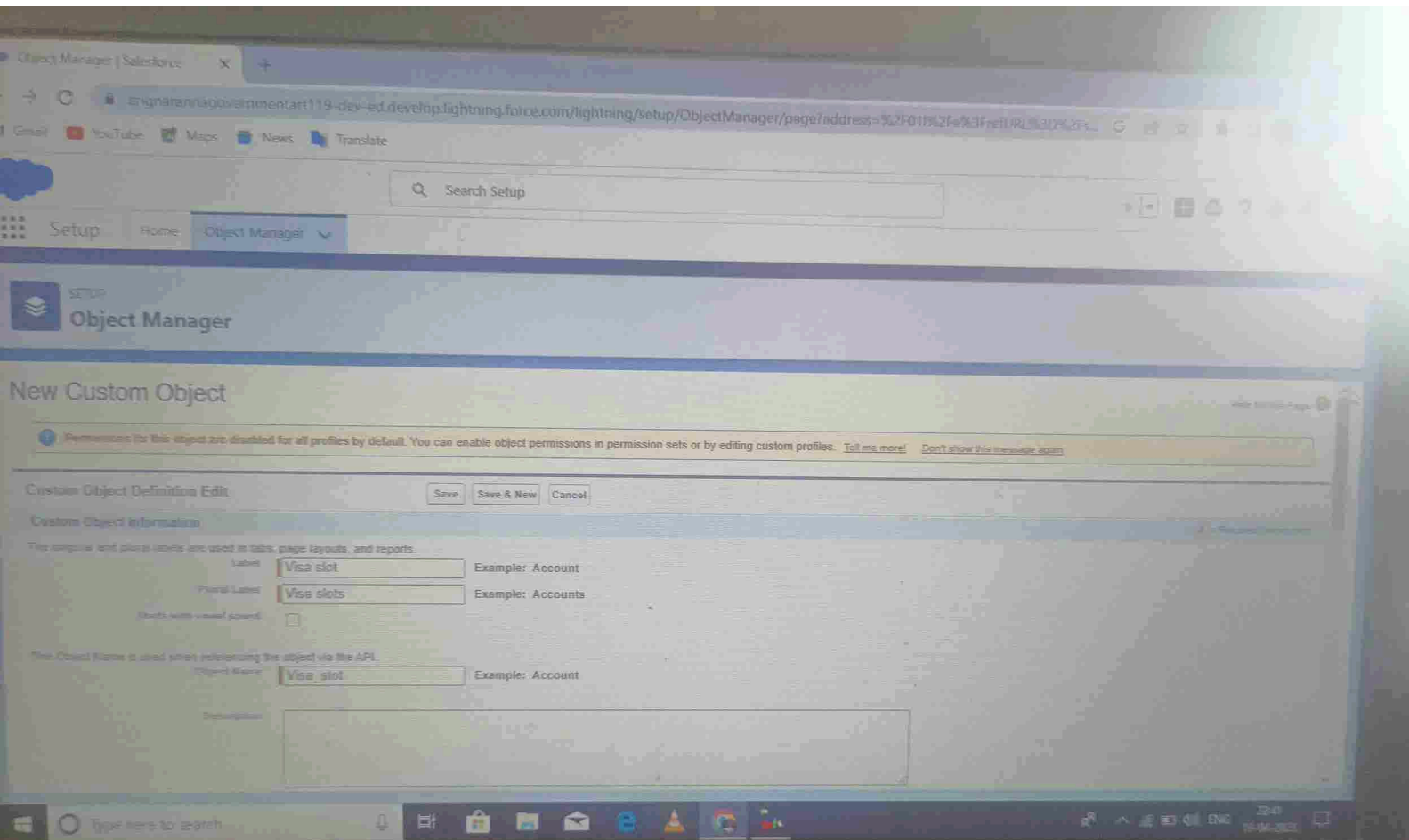
☐

The object name is used when referencing the object in the API.

Object Name

Visa slot

Object Name



Visa slot | Salesforce

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Description

API Name
Visa_slot__c

Custom

✓

Singular Label
Visa slot

Plural Label
Visa slots

Enable Reports
✓

Track Activities

Track Field History

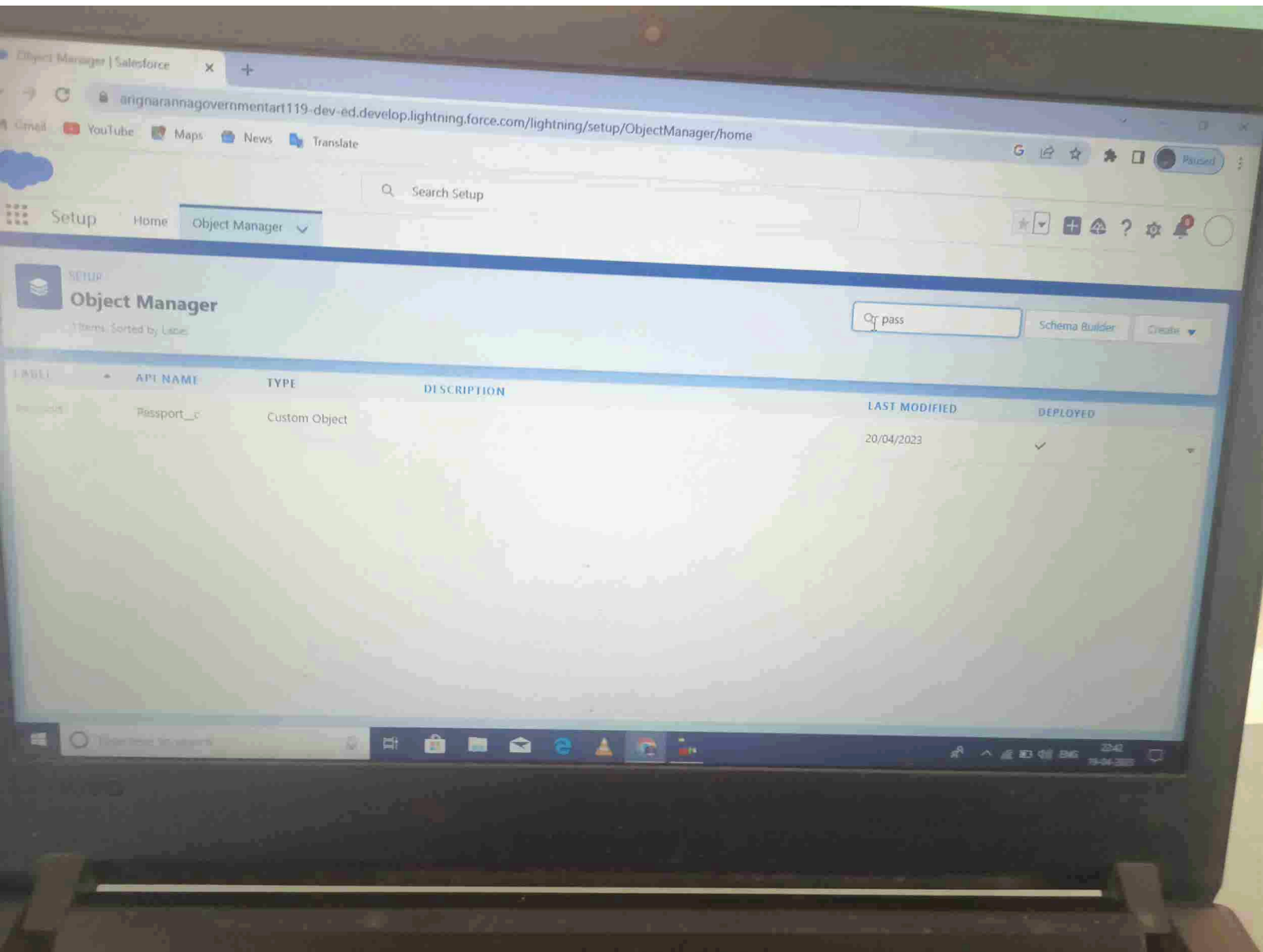
Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

Edit Delete

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22:41
19-04-2023



SETUP > OBJECT MANAGER
Passport

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Description

API Name
Passport__c
Custom
✓
Singular Label
Passport
Plural Label
Passports

Enable Reports
✓
Track Activities
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☐ External Lookup Relationship

- ☐ Checkbox
- ☐ Currency
- ☐ Date
- ☐ Date/Time
- ☐ Email
- ☐ Geolocation
- ☒ Number
- ☐ Percent
- ☐ Phone
- ☐ Picklist
- ☐ Picklist (Multi-Select)

- When a user creates 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. Creates a relationship that links this object to an external object whose data is stored outside the Salesforce.org.
- Allows users to select a True (checked) or False (unchecked) value.
- Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be used in Excel or another spreadsheet.
- Allows users to enter a date or pick a date from a popup calendar.
- 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, the date and time entered into the Date/Time field.
- Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or user, use address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
- Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
- Allows users to enter any number. Leading zeros are removed.
- Allows users to enter a percentage number. For example, "10" and automatically adds the percent sign to the number.
- Allows users to enter any phone number. Automatically formats it as a phone number.
- Allows users to select a value from a list you define.
- Allows users to select multiple values from a list you define.

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New Custom Field

Step 2. Enter the details

Step 2 of 4

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Field Label

Please enter the length of the number and the number of decimal places. For example, a number with a length of 8 and 2 decimal places can accept values up to "12345678.90".

Length

Decimal Places

Number of digits to the left of the decimal point

Number of digits to the right of the decimal point

Field Name

Description

Help Text

Required ☐ Always require a value in this field in order to save a record

Type here to search

Task View Home Mail Edge Chrome Firefox

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← → ↺

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New Custom Field

Help for this Page

Step 3. Establish field-level security

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Step 3 of 4

| | |
|-------------|----------------|
| Field Label | Contact number |
| Data Type | Number |
| Field Name | Contact_number |
| 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 | <input type="checkbox"/> Visible | <input type="checkbox"/> Read-Only |
|----------------------------------|-------------------------------------|------------------------------------|
| Analytics Cloud Integration User | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Analytics Cloud Security User | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Contract Manager | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Cross Org Data Proxy User | <input type="checkbox"/> | <input type="checkbox"/> |

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25:46 18-04-2023

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Fields & Relationships

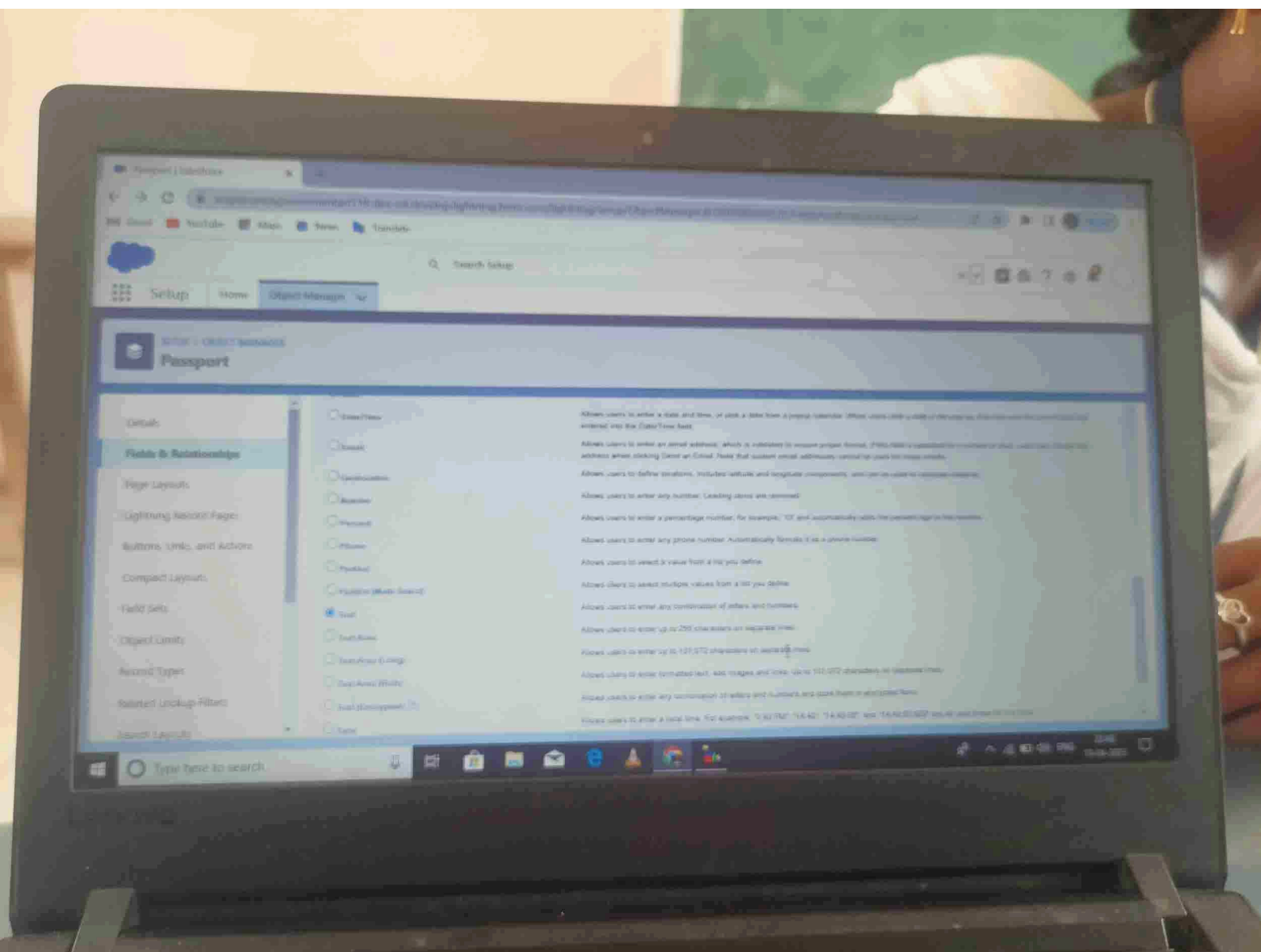
5 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

| FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
|------------------|------------------|---------------------|-------------------|---------|
| Contact number | Contact_number_c | Number(10, 0) | | |
| Created By | CreatedById | Lookup(User) | | |
| Last Modified By | LastModifiedById | Lookup(User) | | |
| Owner | OwnerId | Lookup(User, Group) | | ✓ |
| Passport Name | Name | Text(80) | | ✓ |

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New Custom Field

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Step 2. Enter the details

Step 2 of 4

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Field Label

Passport Number

Please enter the maximum length for a text field below.

Length

10

Field Name

Passport Number

Description

Help Text

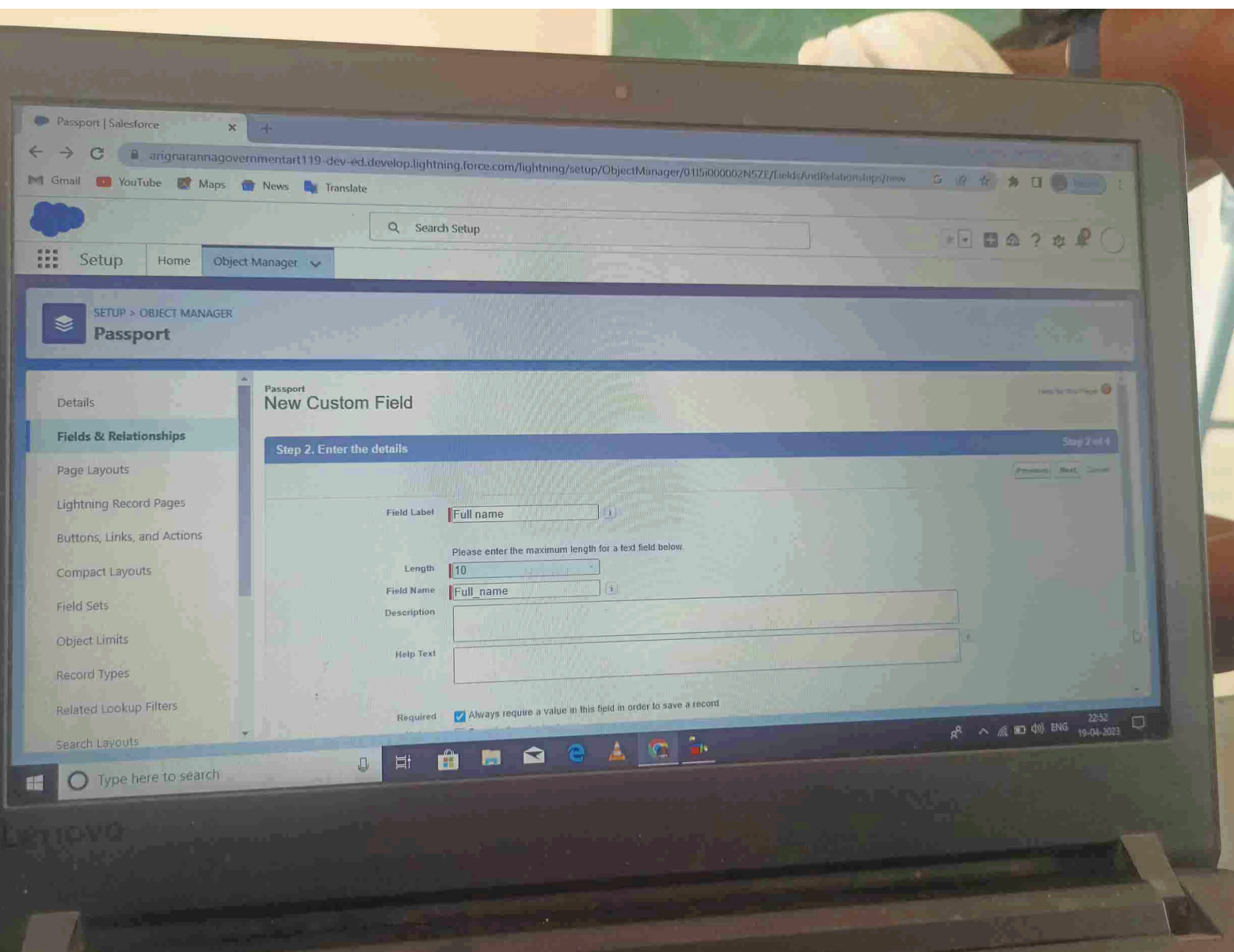
Required

☒ Always require a value in this field in order to save a record

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Passport
New Custom Field

Step 2. Enter the details

Field Label

Length
Please enter the maximum length for a text field below.

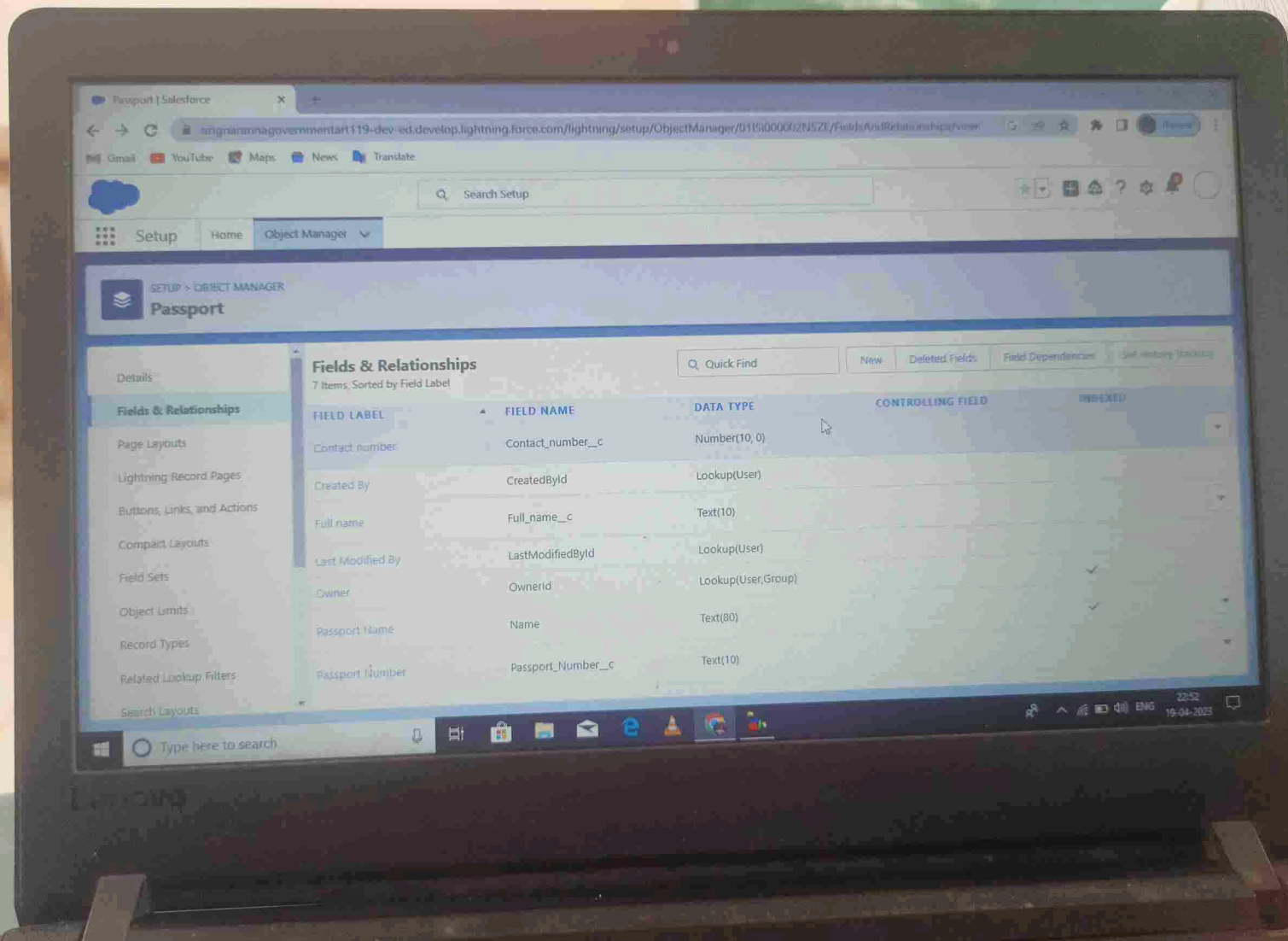
Field Name

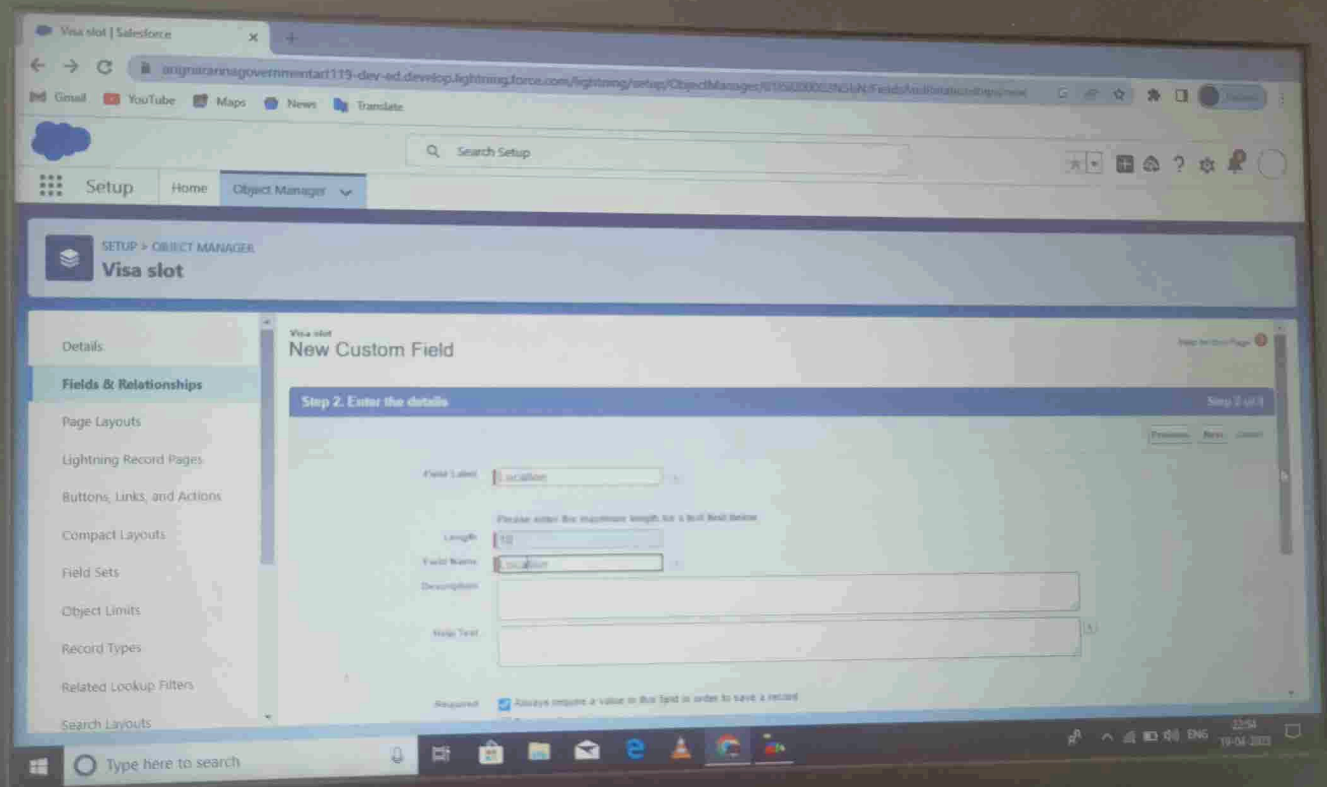
Description

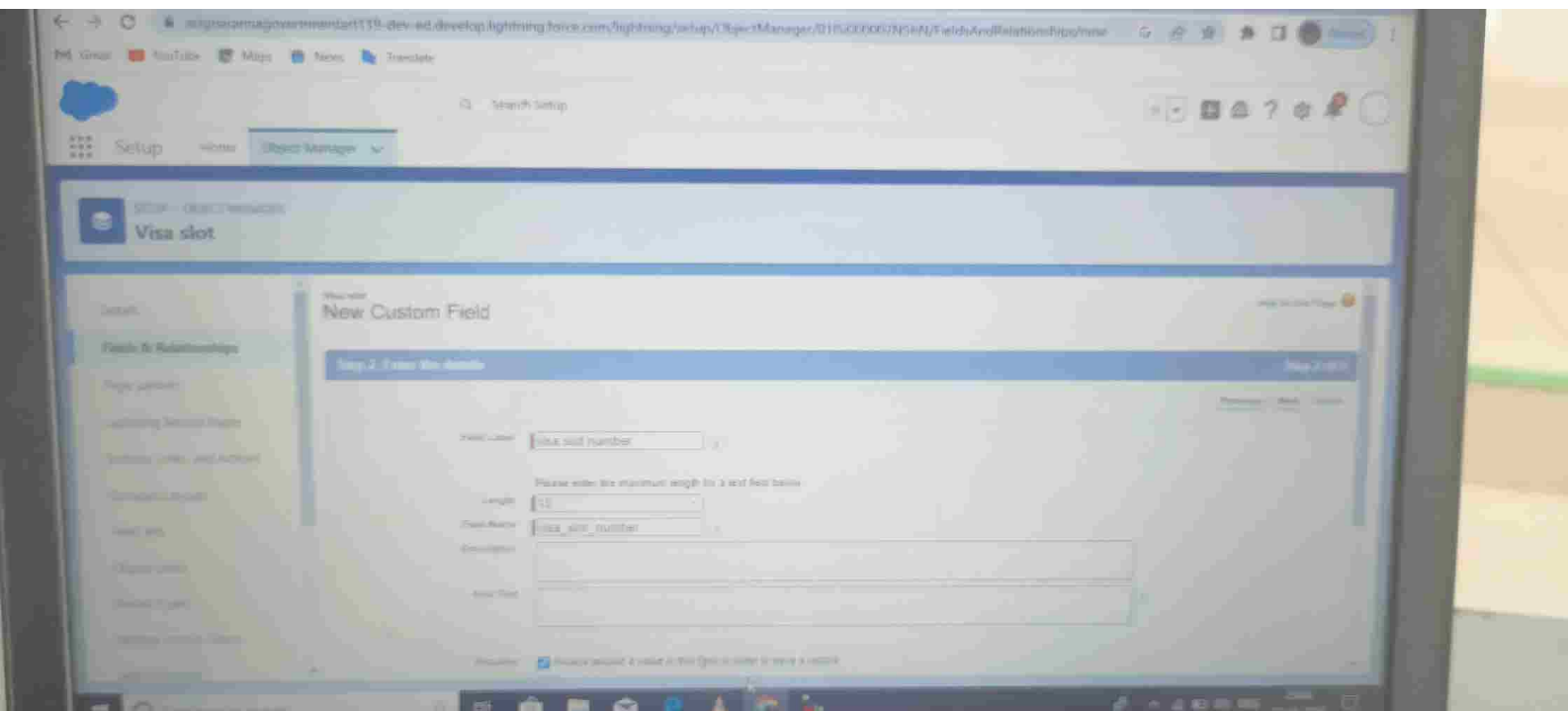
Help Text

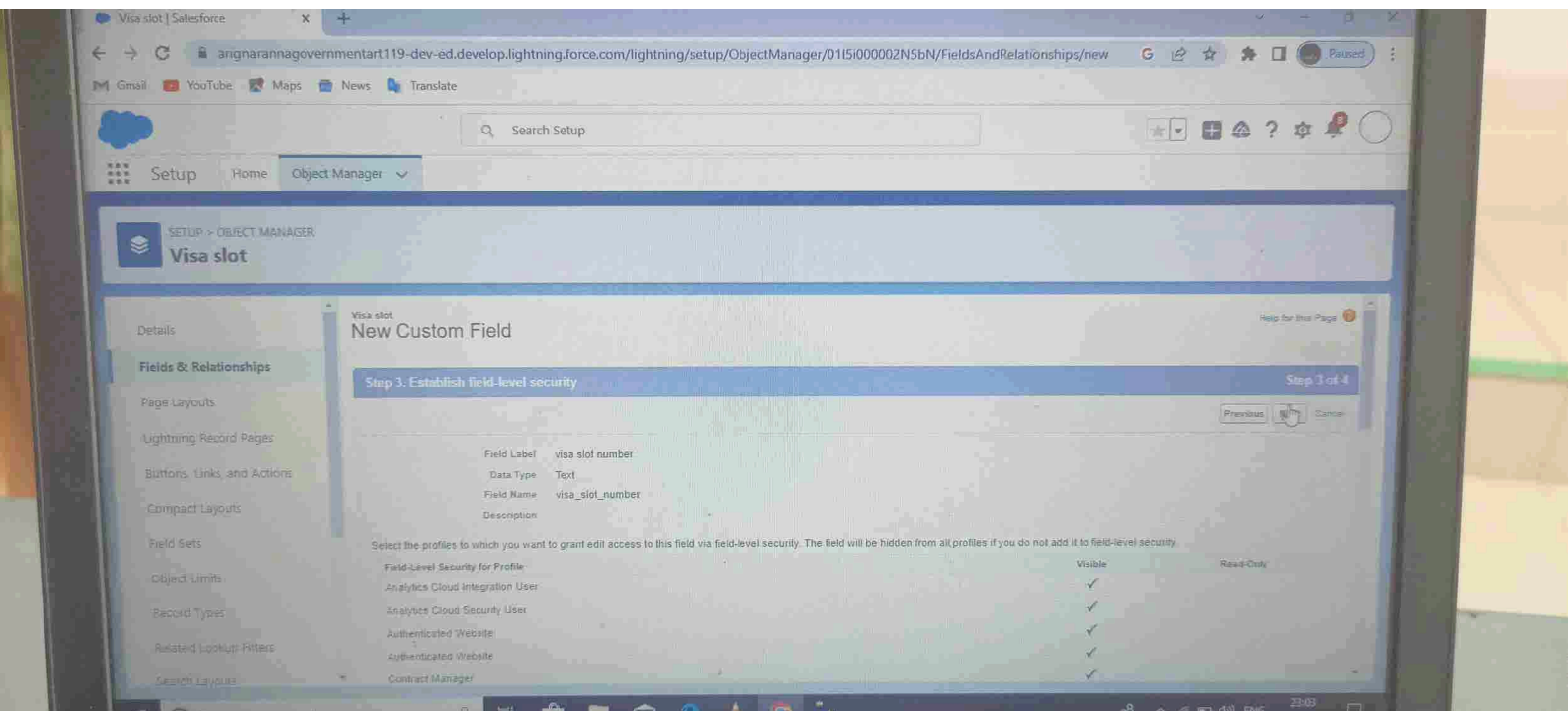
Required ☒ Always require a value in this field in order to save a record

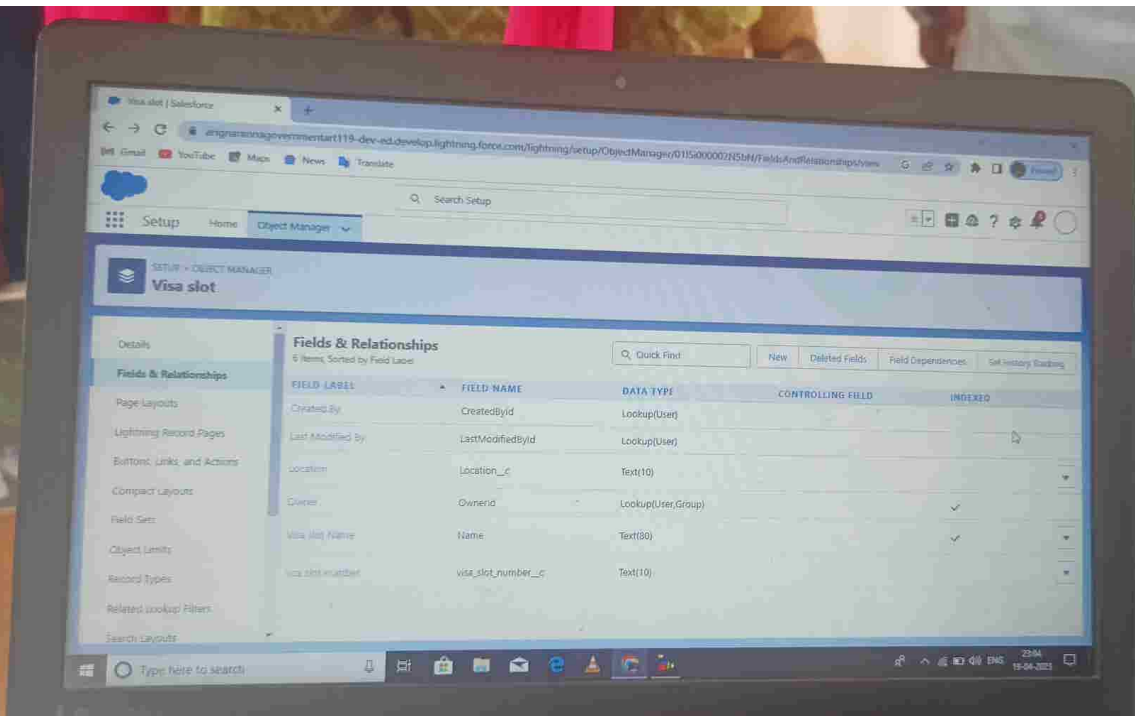
Previous Next Cancel











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☐ Lookup Relationship

☒ Master-Detail Relationship

☐ External Lookup Relationship

☐ Checkbox

☐ Currency

☐ Date

☐ DateTime

☐ Email

☐ Geolocation

☐ Number

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 pop-up list. The other object is the source of the values in the list.

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 roll-up 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 pop-up list. The master object is the source of the values in the list.

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

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

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.

Allows users to enter a date or pick a date from a pop-up calendar.

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

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

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

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

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New Relationship

Step 2. Choose the related object

Step 2 of 6

Select the other object to which this object is related.

Related To Passport

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23:50 15-04-2023

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Visa slot
New Relationship

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

Step 3 of 6

Field Label: Passport

Field Name: Passport

Description:

Help Text:

Child Relationship Name: Visa_slots

Sharing Setting: Select the minimum access level required on the Master record to create, edit, or delete related Detail records.
Read Only: Select a sharing setting. If the parent record is shared with the child, all records related to the parent record are shared.

Type here to search

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19-06-2023

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Help Text

Child Relationship Name:

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

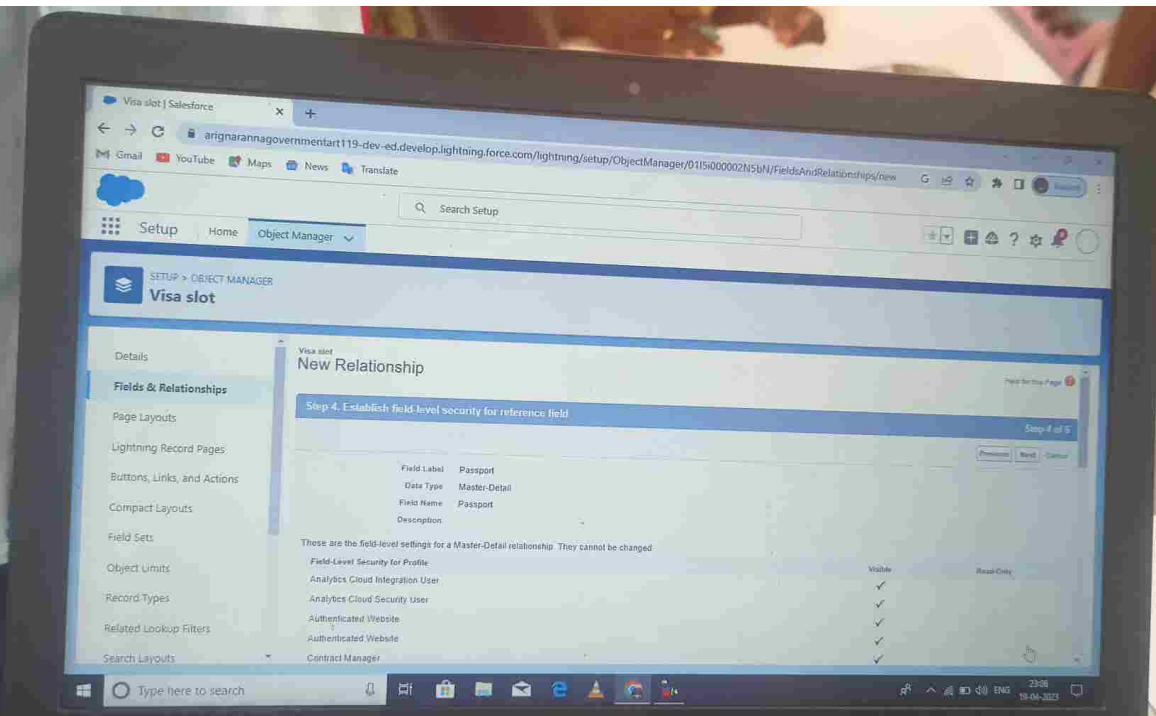
☒ Add this field to existing custom report types that contain this entity

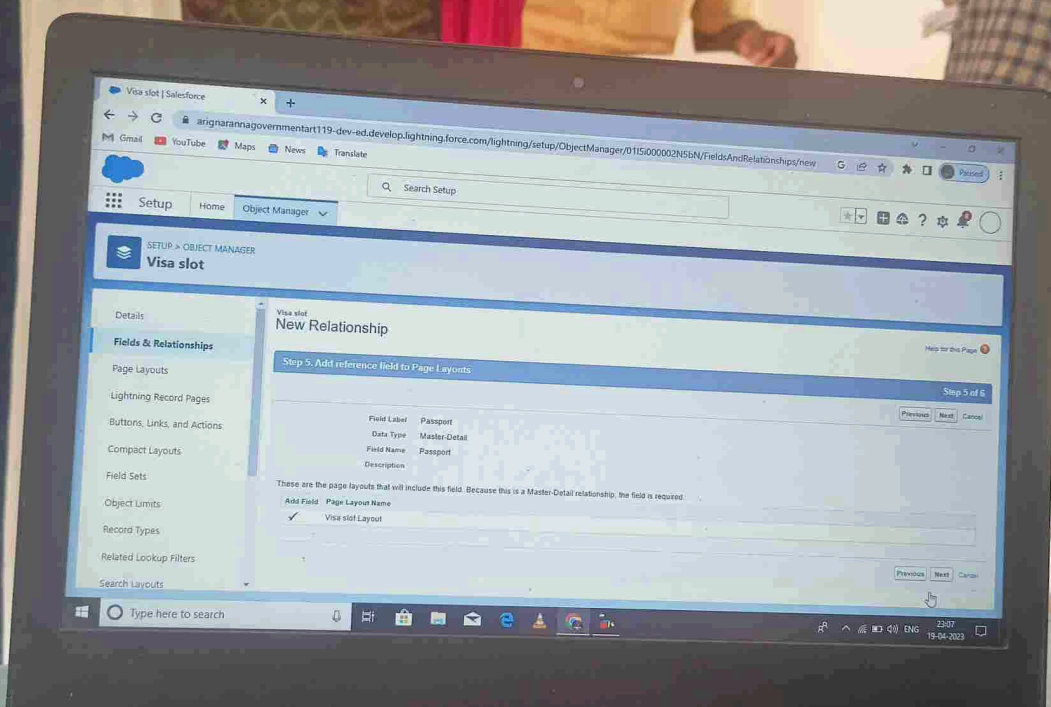
Lookup Filter

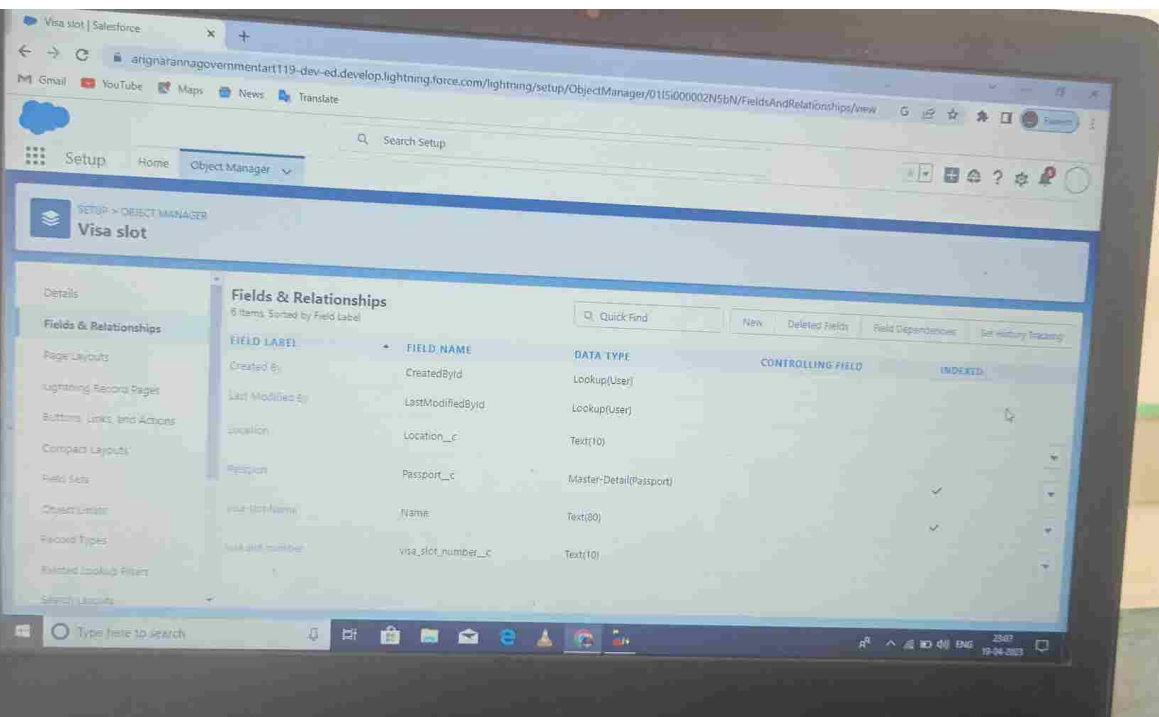
Optionally, create a filter to limit the records available to users in the lookup field. [Tell me more!](#)

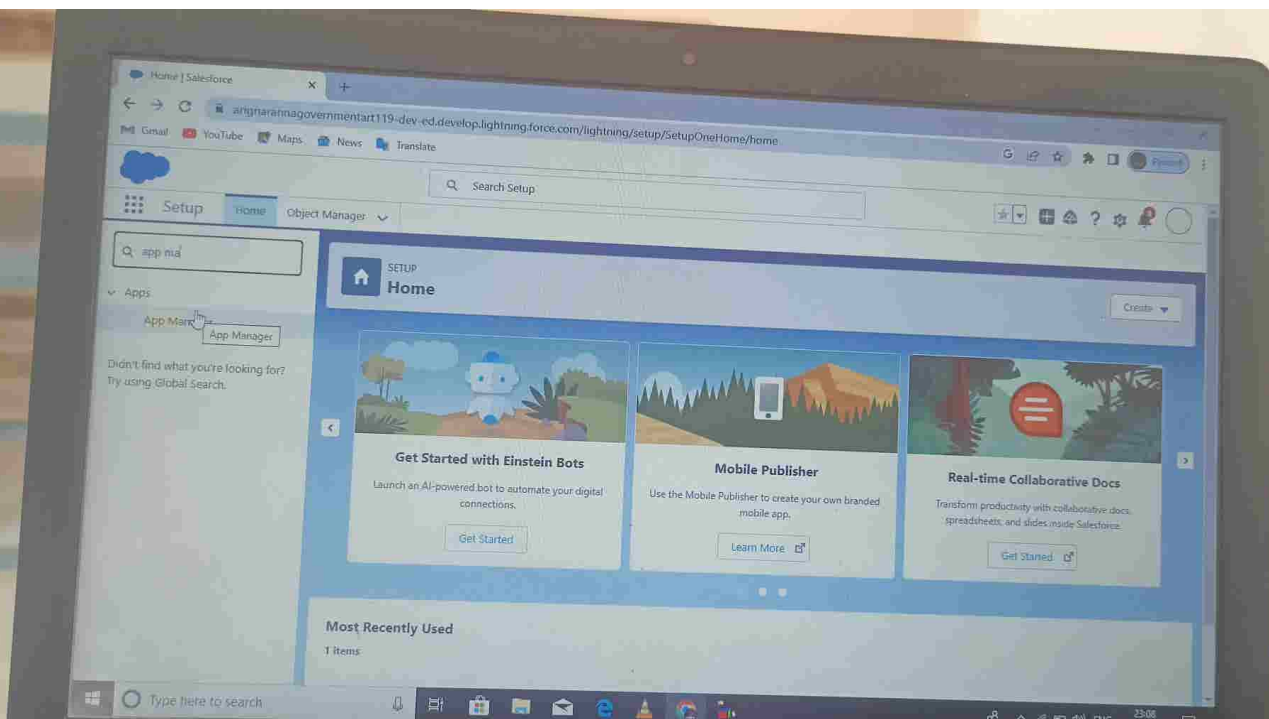
[Show Filter Settings](#)

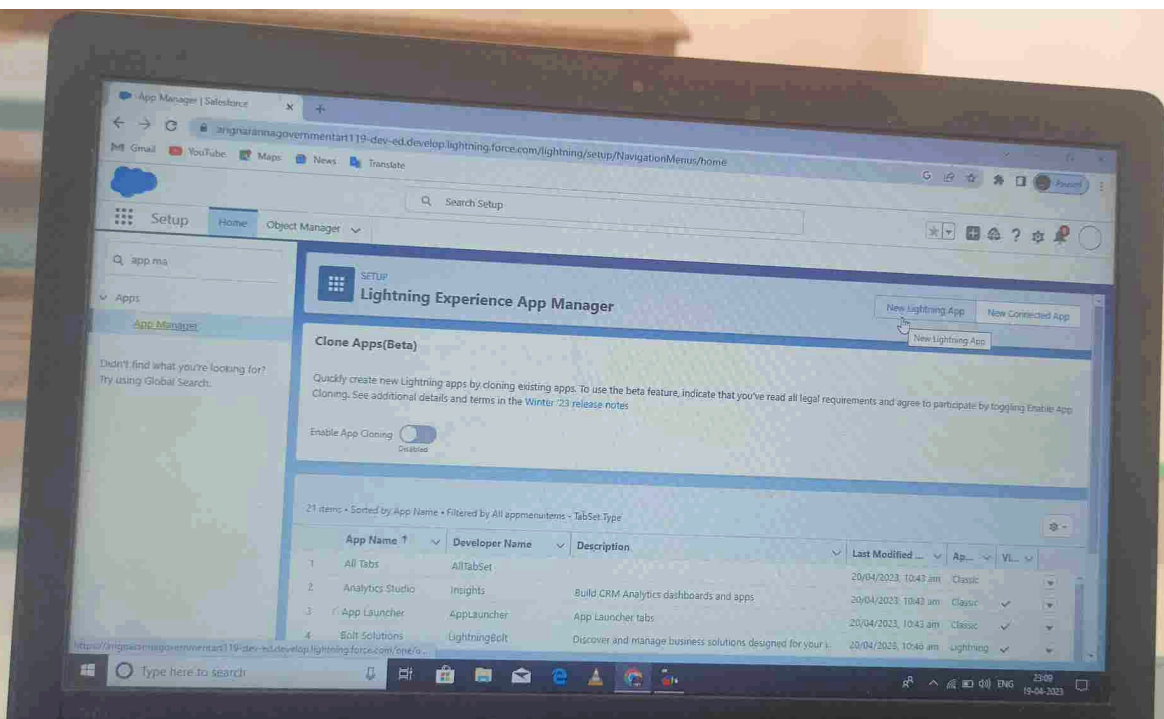
Previous Next Cancel

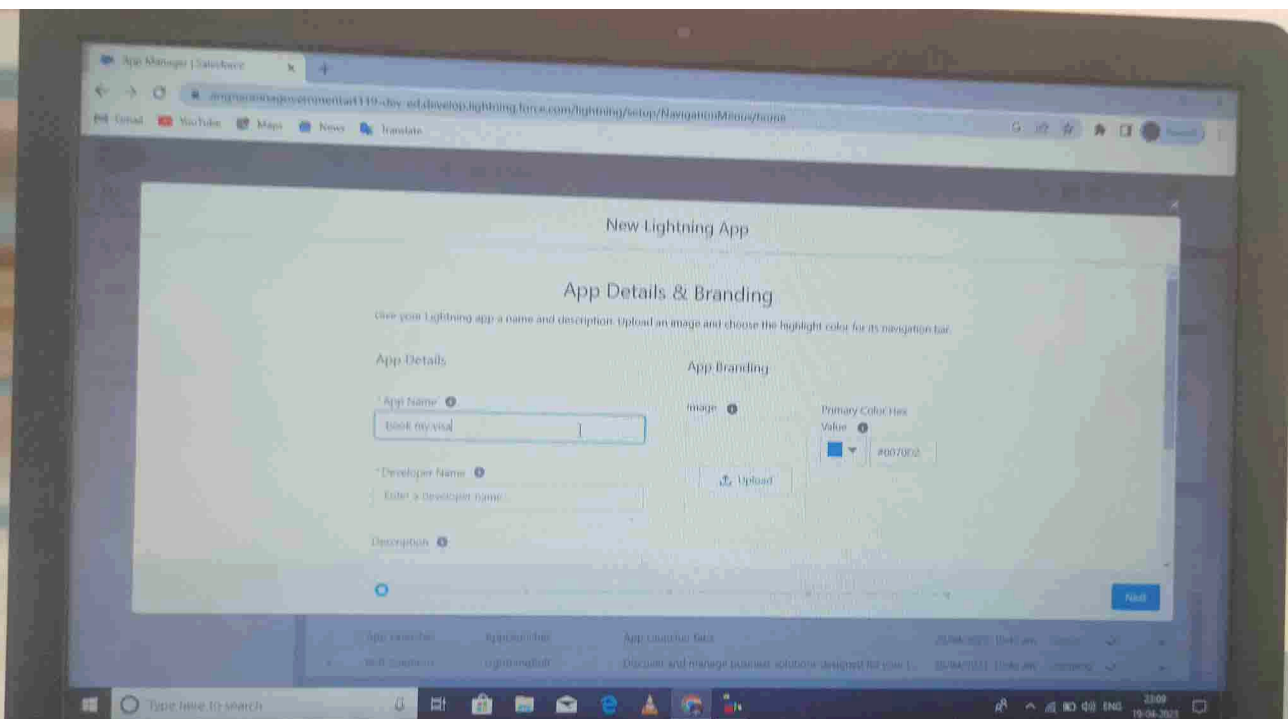


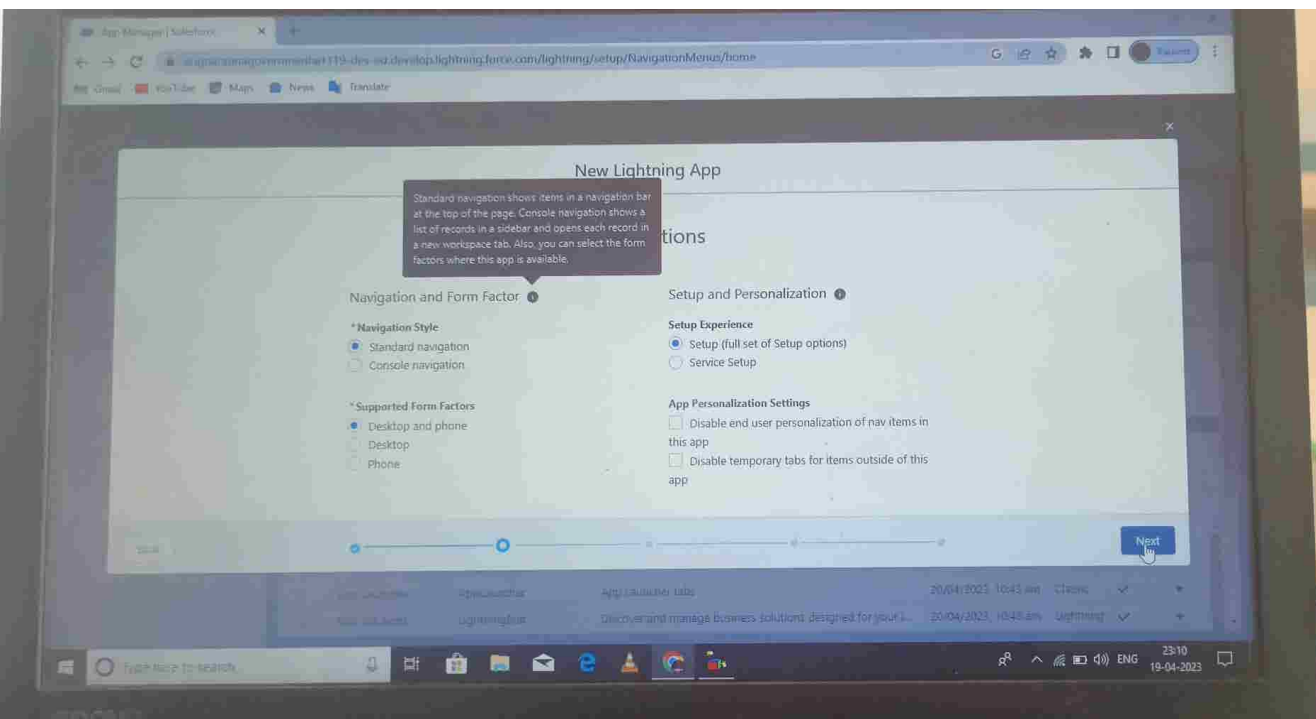


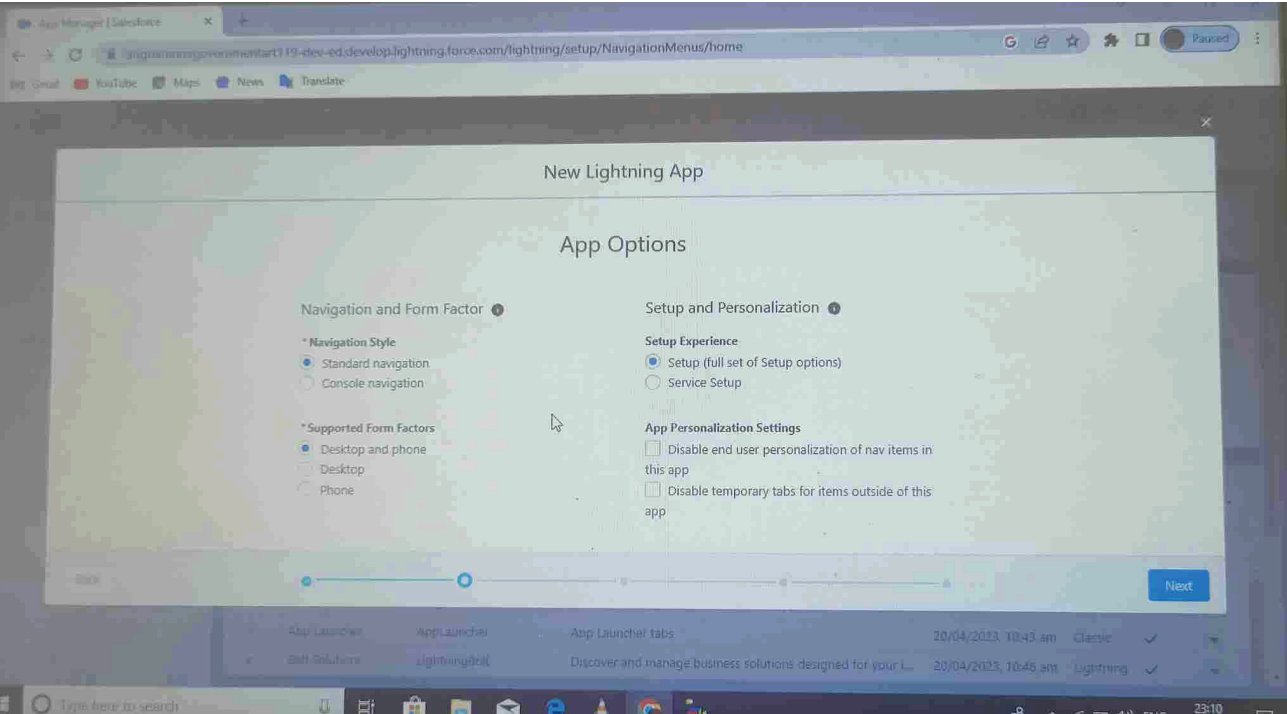


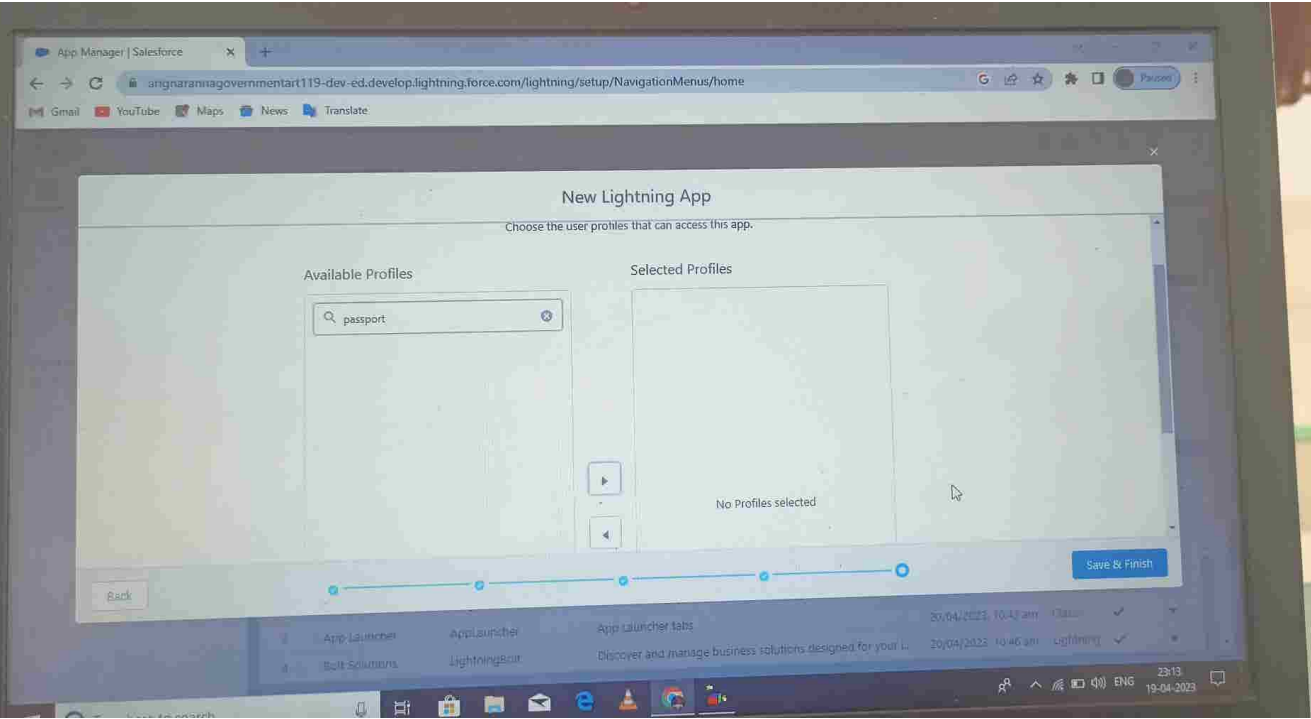


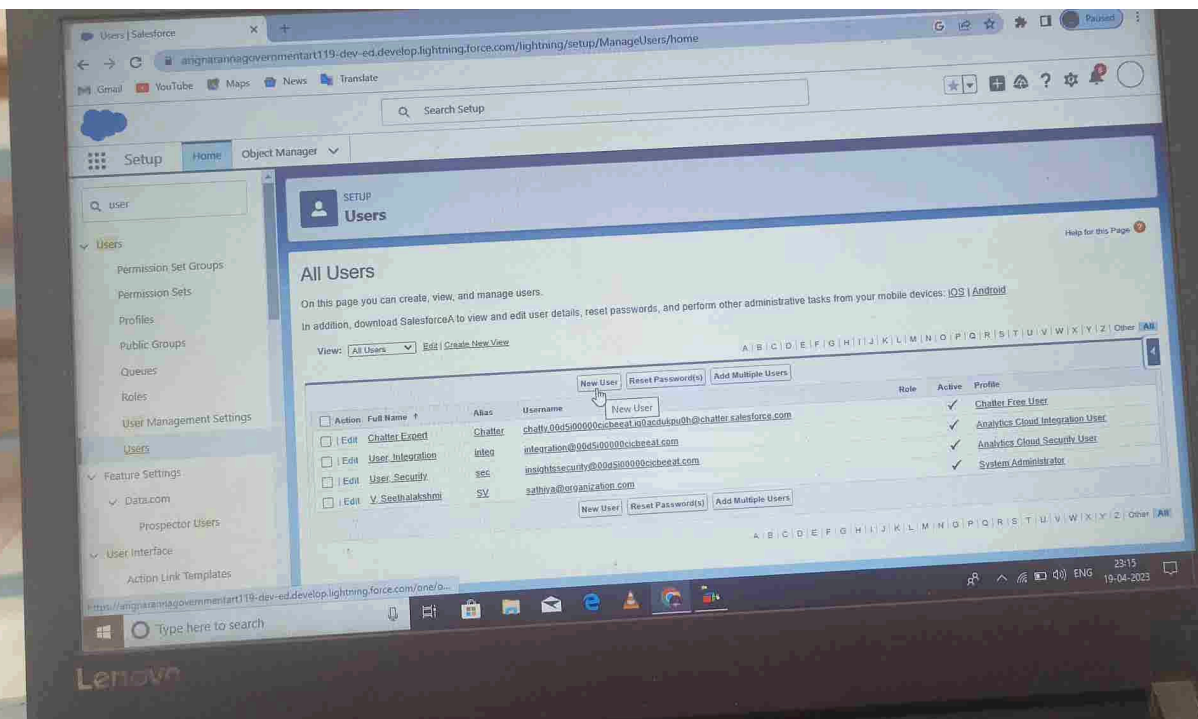


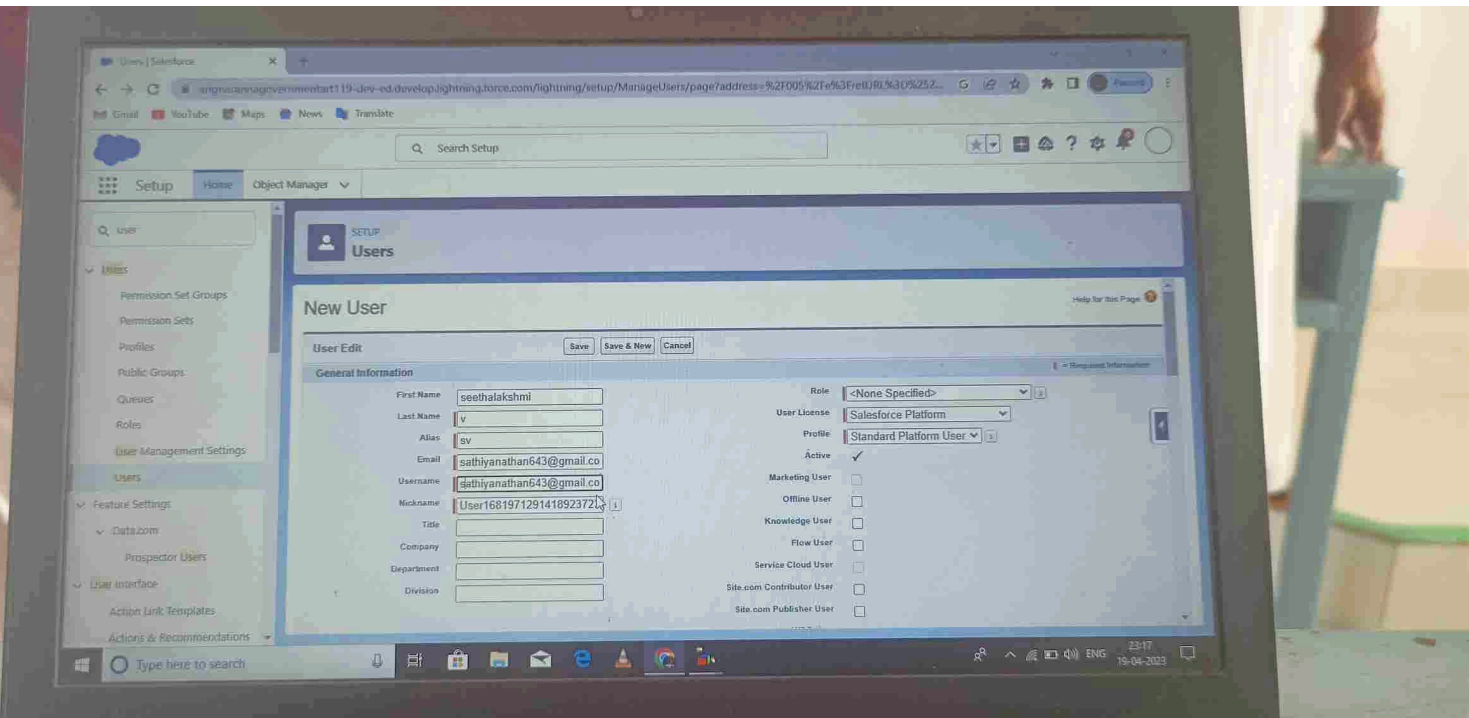


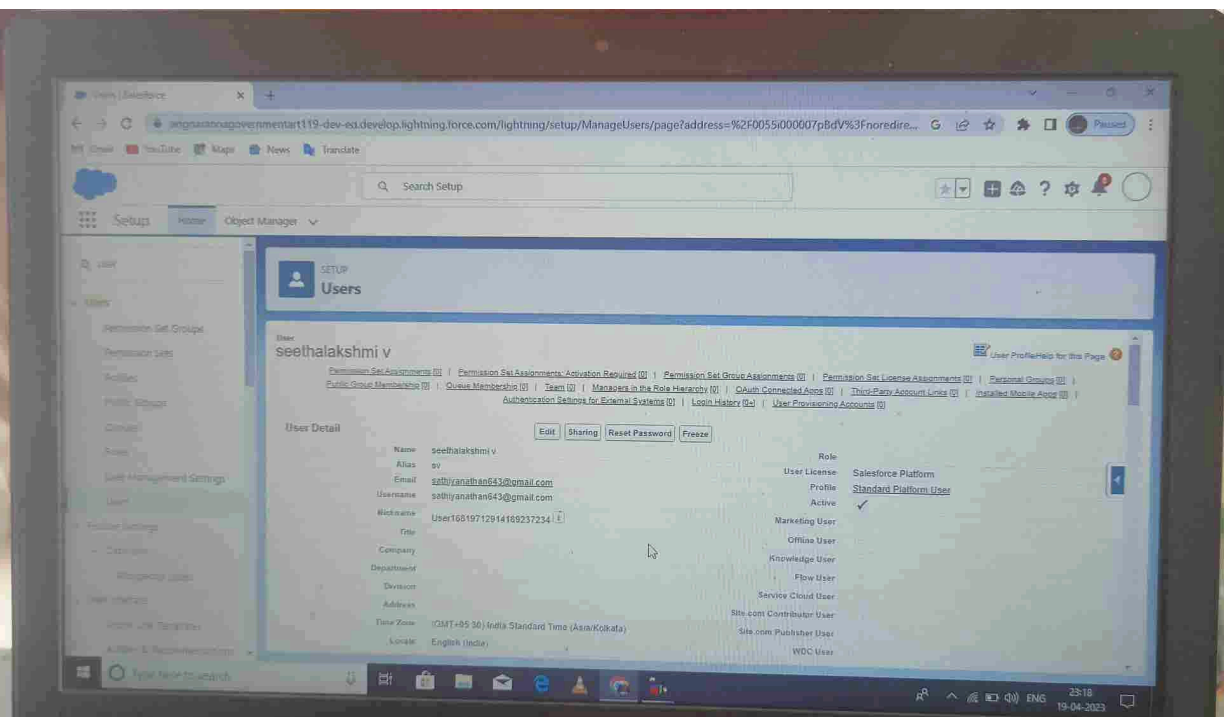


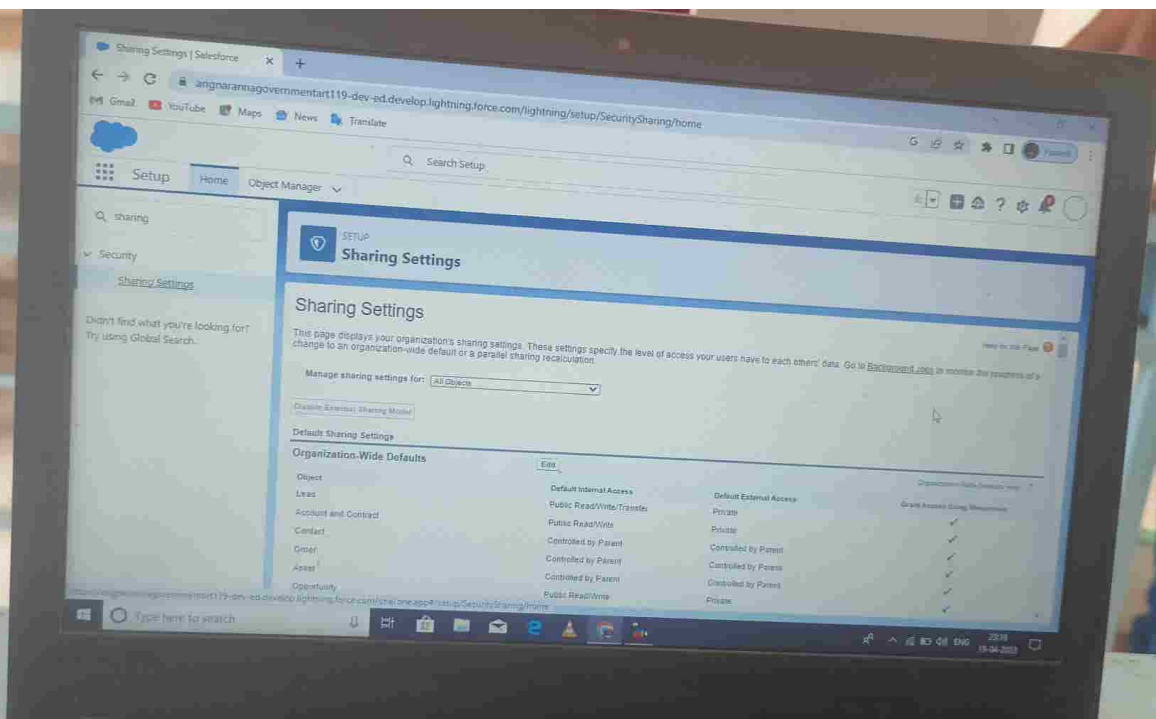


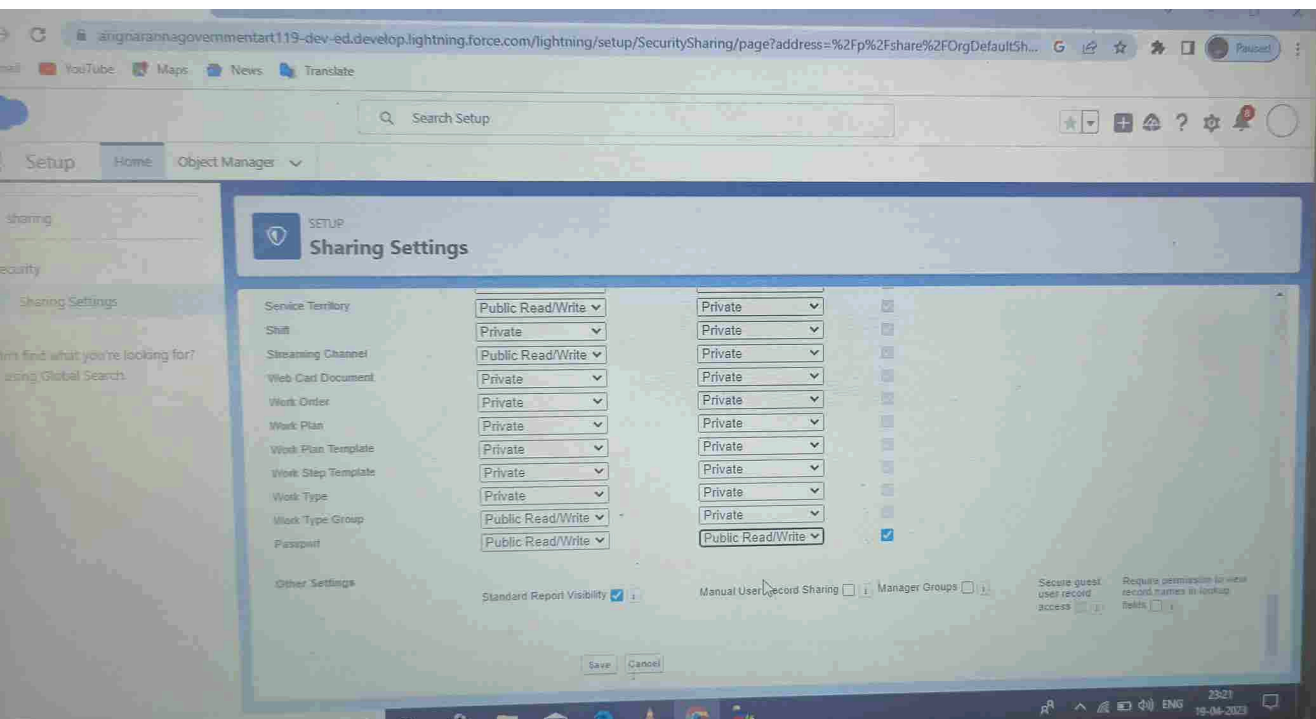


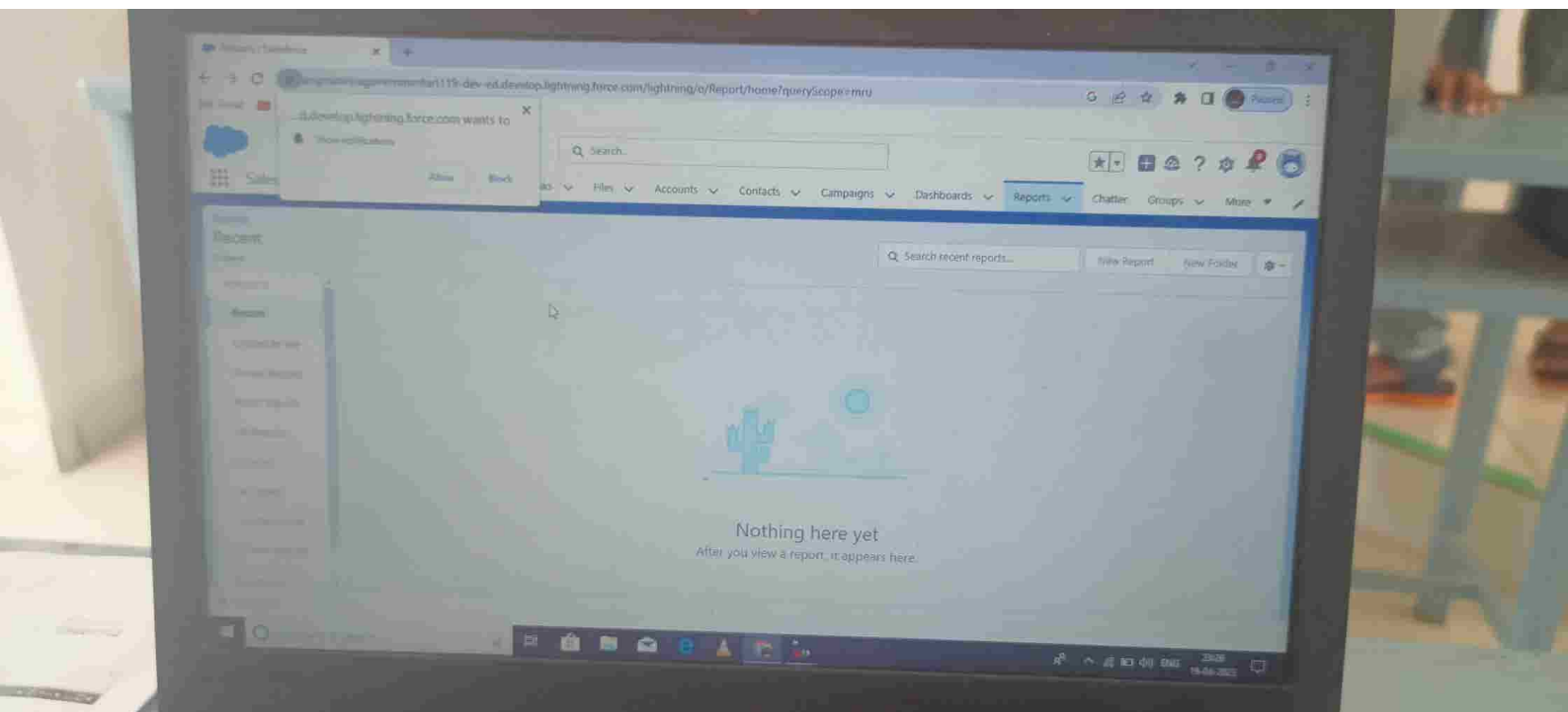


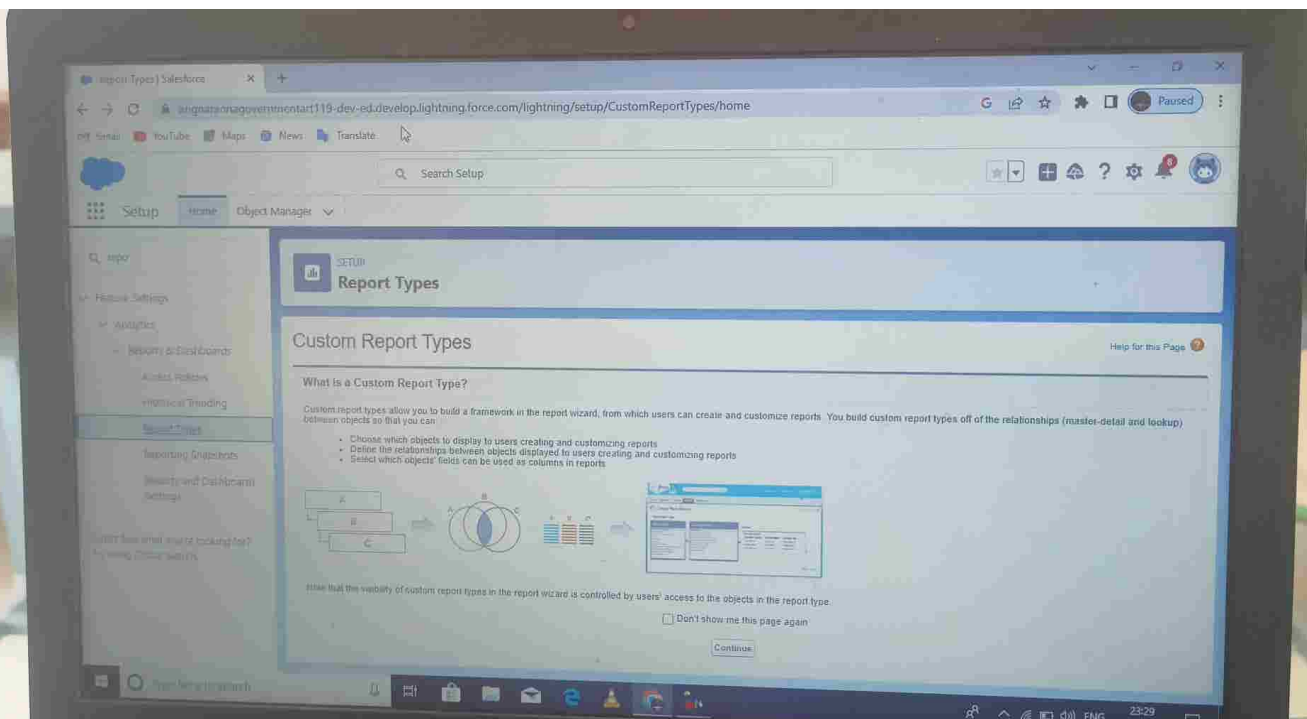












Report Types | Salesforce

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Report Types

New Custom Report Type

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Step 1 of 2

Step 1. Define the Custom Report Type

Report Type Focus

Specify what type of records (rows) will be the focus of reports generated by this report type.
Example: If reporting on "Contacts with Opportunities with Partners," select "Contacts" as the primary object.

Primary Object:

Identifications

Report Type Label:

Report Type Name:

Description:

28:31 19-04-2023

