

# **PROJECT TITLE: To Supply Leftover Food to Poor**

College Name: Rathinam college of liberal arts and science @ Tips global

College Code: CD

**TEAM ID:** NM2025TMID

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# **1. INTRODUCTION**

## **1.1 Project Overview**

A "Supply Leftover Food to Poor People" Salesforce project overview describes a system for managing the logistics of connecting food donors with food-insecure communities by leveraging Salesforce's platform to track venues, volunteers, and distribution tasks. The system uses custom objects like Venue, Drop-Off Point, Task, and Volunteer, along with Salesforce Flows for automation, to streamline the process of collecting surplus food and delivering it to those in need.

## **1.2 Purpose**

A Salesforce project to supply leftover food to the poor creates a digital platform to connect food donors (like restaurants or event venues) with drop-off points and volunteers, streamlining food recovery and redistribution to combat food waste and hunger. The project uses Salesforce's CRM capabilities and custom objects to manage donors, venues, volunteers, and the logistics of food pickup and delivery, ensuring efficient tracking and coordination for a social impact initiative.

## **DEVELOPMENT PHASE**

### **Creating Development Account:**

By using this URL - <https://www.salesforce.com/form/developer-signup/?d=pb>

## SALESFORCE DEVELOPER ACCOUNT CREATION :

Steps to sign up for a free Salesforce Developer account.

The screenshot shows the sign-up page for the Salesforce Developer Edition. The URL in the browser is <https://www.salesforce.com/form/developer-signup/?d=pb>. The page has a dark blue header with the Salesforce logo and the text "Build enterprise-quality apps fast and get hands-on with Agentforce and Data Cloud." Below this, there's a section titled "Sign up for your Developer Edition" with a list of features:

- ✓ Build apps fast with drag-and-drop tools
- ✓ Go further with Apex code
- ✓ Build AI agents with Agentforce
- ✓ Harmonize your data with Data Cloud
- ✓ Ground Agentforce with structured and unstructured data
- ✓ Integrate with anything using APIs

On the right side, there's a form titled "Sign up for your Developer Edition" which includes fields for First name (M), Last name (Bala), Job title (sales force), Work email (yashikamuthaiah@gmail.com), Company (Rathinam college of IT), and Country/Region (India). There's also a note about org provisioning and a checkbox for agreeing to the Main Services Agreement and Salesforce Program Agreement. At the bottom, there's a link to the Privacy Statement and a "Next Step" button.

Gmail Search mail

Welcome to Salesforce: Reset your password

support@salesforce.com <support@salesforce.com> to me Sat, Sep 6, 9:21 PM (15 hours ago)

Welcome to your Developer Edition

Hi M,

Thanks for signing up for a Developer Edition. Now you can start building on Salesforce for free and get hands-on with Agentforce and Data Cloud.

There's just one more step. Use the following link to reset the password for your Developer Edition. This link expires in 24 hours.

[Reset Password](#)

To easily log in later, save this URL:  
<https://orgfarm-18cf74998b-dev-ed.develop.my.salesforce.com>

Enable desktop notifications for Gmail. OK No thanks

The screenshot shows the Salesforce Setup Home page. On the left, there's a sidebar with links like Setup Home, Salesforce Go, Service Setup Assistant, etc. The main area features three cards: 'Data Cloud' (Setup), 'Get Started with Einstein Bots' (Setup), and 'Mobile Publisher' (Setup). Below these is a section titled 'Most Recently Used' with a table showing three items: 'Venue Location' (Custom Field Definition, Venue), 'Location' (Custom Field Definition, Venue), and 'Contact Phone' (Custom Field Definition, Venue).

## OBJECT:

Custom Object: Venue Object, Drop-Off Point Object, Task Object, Volunteer Object, etc.

The screenshot shows the Salesforce Object Manager for the 'Venue' object. The left sidebar lists various configuration options: 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, Restriction Rules, and Scoping Rules. The main panel displays the 'Details' tab for the 'Venue' object. It includes fields for Description, API Name (set to 'Venue\_c'), Singular Label ('Venue'), Plural Label ('Venues'), and several checkboxes for reports, activities, field history, deployment status (set to 'Deployed'), and help settings.

Setup > OBJECT MANAGER

## Drop-Off Point

**Details**

Description	
API Name	Drop_Off_Point_c
Custom	✓
Singular Label	Drop-Off Point
Plural Label	Drop-Off Points

**Details**

Enable Reports	
Track Activities	✓
Track Field History	✓
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

**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
- Restriction Rules
- Scoping Rules

**Edit** **Delete**

Setup > OBJECT MANAGER

## Task

**Details**

Description	
API Name	Task_c
Custom	✓
Singular Label	Task
Plural Label	Tasks

**Details**

Enable Reports	
Track Activities	✓
Track Field History	✓
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

**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
- Restriction Rules
- Scoping Rules

**Edit** **Delete**

Setup Home Object Manager

SETUP > OBJECT MANAGER  
**Volunteer**

**Details**

Description

API Name  
Volunteer\_c

Custom

Singular Label  
Volunteer

Plural Label  
Volunteers

Enable Reports  
✓

Track Activities  
✓

Track Field History  
✓

Deployment Status  
Deployed

Help Settings  
Standard salesforce.com Help Window

[Edit](https://orgfarm-692e43bc2-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01nK0000024srzr/Details/view) [Delete](#)

[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](#)

[Restriction Rules](#)

[Scoping Rules](#)

<https://orgfarm-692e43bc2-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01nK0000024srzr/Details/view>

Setup Home Object Manager

SETUP > OBJECT MANAGER  
**Execution Detail**

**Details**

Description

API Name  
Execution\_Detail\_c

Custom

Singular Label  
Execution Detail

Plural Label  
Execution Details

Enable Reports  
✓

Track Activities  
✓

Track Field History  
✓

Deployment Status  
Deployed

Help Settings  
Standard salesforce.com Help Window

[Edit](#) [Delete](#)

[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](#)

[Restriction Rules](#)

[Scoping Rules](#)

<https://orgfarm-692e43bc2-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01gK0000024udZr/Details/view>

Setup > Object Manager

## Venue

Details

**Fields & Relationships**

8 items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Contact Email	Contact_Email__c	Email		
Contact Phone	Contact_Phone__c	Phone		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Location	Location__c	Geolocation		
Owner	OwnerId	Lookup(User,Group)		✓
Venu Name	Name	Text(80)		✓
Venue Location	Venue_Location__c	Long Text Area(32768)		

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

Restriction Rules

Scoping Rules

Setup > Object Manager

## Drop-Off Point

Details

**Fields & Relationships**

5 items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Drop-Off Point Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Venue	Venue__c	Lookup(Venue)		✓

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

Restriction Rules

Scoping Rules

<https://orgfarm-e92e43bc2-dev-ed.lightning.force.com/one/one.app#/setup/ObjectManager/01pk0000024al/CompactLayouts/view>

Setup Home Object Manager

### Task

SETUP > OBJECT MANAGER

**Fields & Relationships**

5 Items, Sorted by Field Label

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)		✓
Task Name	Name	Text(80)		✓
Venue	Venue__c	Lookup(Venue)		✓

Quick Find New Deleted Fields Field Dependencies Set History Tracking

Details 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 Restriction Rules Scoping Rules

Setup Home Object Manager

### Volunteer

SETUP > OBJECT MANAGER

**Fields & Relationships**

4 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Drop-Off Point	Drop_Off_Point__c	Master-Detail(Drop-Off Point)		✓
Last Modified By	LastModifiedById	Lookup(User)		✓
Volunteer Name	Name	Text(80)		✓

Quick Find New Deleted Fields Field Dependencies Set History Tracking

Details 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 Restriction Rules Scoping Rules

<https://orgfarm-692ee4bc2-dev-ed.develop.lightning.force.com/one/one.app#/setup/ObjectManager/01gK0000024sc/fieldsAndRelationships/view>

SETUP > OBJECT MANAGER

### Execution Detail

**Fields & Relationships**

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Execution Detail Name	Name	Text(80)		
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		

## TABS:

Creating custom tabs for easy access to the custom objects.

**Custom Tabs**

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

**Custom Object Tabs**

Action	Label	Tab Style	Description
Edit   Del	Drop-Off Points	Bell	
Edit   Del	Execution Details	Bottle	
Edit   Del	Tasks	Building Block	
Edit   Del	Venues	Alarm clock	
Edit   Del	Volunteers	Car	

**Web Tabs**

No Web Tabs have been defined.

**Visualforce Tabs**

No Visualforce Tabs have been defined.

**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: FoodConnect

\*Developer Name: FoodConnect

Description: Enter a description...

**App Branding**

Image:  Primary Color Hex: #0070D2

Org Theme Options:  Use the app's image and color instead of the org's custom theme

Next

12	FoodConnect	FoodConnect	9/6/2025, 9:40 AM	Lightning
13	Lightning Usage App	LightningInstrumentation	6/20/2025, 4:11 PM	Lightning
14	Marketing CRM Classic	Marketing	6/20/2025, 4:11 PM	Classic

## THE LIGHTNING APP :

Creating a Lightning App named “FoodConnect” or similar for all components.

**Lightning Experience App Manager**

27 items • Sorted by App Name • Filtered by All appmenuremains - TabSet Type, App Type

App Name	Developer Name	Description	Last Modified	Type	Visibility
5 Automation	FlowsApp	Automate business processes and repetitive tasks.	6/20/2025, 4:18 PM	Lightning	Visible
6 Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	6/20/2025, 4:11 PM	Lightning	Visible
7 Community	Community	Salesforce CRM Communities	6/20/2025, 4:11 PM	Classic	Visible
8 Content	Content	Salesforce CRM Content	6/20/2025, 4:11 PM	Classic	Visible
9 Data Cloud	Audience360	Build a thorough and complete understanding of your customers.	6/20/2025, 4:11 PM	Lightning	Visible
10 Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	6/20/2025, 4:11 PM	Lightning	Visible
11 Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	6/20/2025, 4:11 PM	Lightning	Visible
12 FoodConnect	FoodConnect		9/6/2025, 9:40 AM	Lightning	Visible
13 Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	6/20/2025, 4:11 PM	Lightning	Visible
14 Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	6/20/2025, 4:11 PM	Classic	Visible
15 My Service Journey	MSJApp	Discover new customer service capabilities.	6/20/2025, 4:11 PM	Lightning	Visible
16 Platform	Platform	The fundamental Lightning Platform	6/20/2025, 4:11 PM	Classic	Visible
17 Queue Management	QueueManagement	Create and manage queues for your business.	6/20/2025, 4:11 PM	Lightning	Visible
18 Sales	Sales	The world's most popular sales force automation (SFA) solution	6/20/2025, 4:11 PM	Classic	Visible

## FIELDS:

Custom Fields for each object like Venue object, Drop-Off point object, Task object, Volunteer object, etc.

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. Under 'Volunteer', the 'Fields & Relationships' tab is active. On the left, a sidebar lists various setup options. The main area displays the 'Data Type' configuration for a custom field. It includes a list of data types: None Selected, Auto Number, Formula, Roll Up Summary, Lookup Relationship, Master-Detail Relationship (selected), External Lookup Relationship, Checkbox, Currency, Date, and DateTime. Each type has a brief description and specific details.

The screenshot shows the 'New Relationship' configuration for the 'Volunteer' object. The 'Step 2. Choose the related object' step is selected. A dropdown menu titled 'Select the other object to which this object' is open, showing a list of objects: Guest User Anomaly Event Store, Incident, Incident Related Item, Individual, Inventory Reservation, Invoice Line, Legal Entity, Location, Location Group, Location Shipping Carrier Method, Login Anomaly Event Store, Macro, Messaging Session, Messaging User, Operating Hours, Operating Hours Holiday, and Opportunity. The 'Opportunity' option is highlighted. Below the dropdown, a 'Related To' dropdown is set to '-None-'.

The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup' (with a blue cloud icon), 'Home', 'Object Manager', and a search bar labeled 'Search Setup'. To the right are various global icons. The main content area is titled 'SETUP > OBJECT MANAGER' and 'Execution Detail'. On the left, a sidebar lists categories like 'Details', 'Fields & Relationships' (which is selected and highlighted in blue), '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', 'Restriction Rules', and 'Scoping Rules'. The main panel displays information about 'Master-Detail Relationship' and 'External Lookup Relationship', each with a list of field types (e.g., Checkbox, Date, Email, Geolocation, Number, Percent, Phone, Picklist, Picklist (Multi-Select), Text) and their descriptions.

The screenshot shows the Salesforce Setup interface. The top navigation bar includes the Salesforce logo, a search bar labeled "Search Setup", and various global icons. The main menu bar has "Setup" selected, followed by "Home" and "Object Manager". Below this, a breadcrumb trail reads "SETUP > OBJECT MANAGER". The main content area is titled "Execution Detail" and "New Relationship". A sidebar on the left lists various setup categories: Details, Fields & Relationships (which is currently selected), 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, Restriction Rules, and Scoping Rules. The main panel displays "Step 2. Choose the related object" with a dropdown menu set to "Volunteer". Navigation buttons at the bottom right include "Previous", "Next", and "Cancel".

Setup Home Object Manager

SETUP > OBJECT MANAGER Execution Detail

Execution Detail New Relationship

Step 3. Enter the label and name for the lookup field Step 3 of 6

Field Label: Volunteer

Field Name: Volunteer

Description:

Help Text:

Child Relationship Name: Execution\_Details

Sharing Setting: Read/Write (selected)

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

Previous Next Cancel

Help for this Page

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 Restriction Rules Scoping Rules

Setup Home Object Manager

SETUP > OBJECT MANAGER Execution Detail

New Relationship

Step 4. Establish field-level security for reference field Step 4 of 6

Field Label: Volunteer

Data Type: Master-Detail

Field Name: Volunteer

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	✓	□
Anypoint Integration	✓	□
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	✓	□

Previous Next Cancel

The screenshot shows the Salesforce Setup interface for the 'Execution Detail' object. The left sidebar is titled 'Fields & Relationships' and includes options like 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, Restriction Rules, and Scoping Rules. The main content area is titled 'New Relationship' and 'Step 5. Add reference field to Page Layouts'. It displays the following details:

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

Below this, it says: "These are the page layouts that will include this field. Because this is a Master-Detail relationship, the field is required." A checkbox labeled "Add Field Page Layout Name" is checked, and the value "Execution Detail Layout" is listed. Navigation buttons at the bottom right include 'Previous', 'Next', and 'Cancel'.

The screenshot shows the Salesforce Setup interface for the 'Execution Detail' object. The left sidebar is identical to the previous screenshot. The main content area is titled 'New Relationship' and 'Step 6. Add custom related lists'. It displays the following details:

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

Below this, it says: "Specify the title that the related list will have in all of the layouts associated with the parent." A text input field labeled "Related List Label" contains the value "Execution Details". A checkbox labeled "Add Related List Page Layout Name" is checked, and the value "Volunteer Layout" is listed. Another checkbox labeled "Append related list to users' existing personal customizations" is checked. Navigation buttons at the bottom right include 'Previous', 'Save & New', 'Save', and 'Cancel'.

Setup > Object Manager

## Execution Detail

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  
Restriction Rules  
Scoping Rules

**Fields & Relationships**  
4 items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Execution Detail Name	Name	Text(80)		
Last Modified By	LastModifiedBy	Lookup(User)		
Volunteer	Volunteer__c	Master-Detail(Volunteer)		

Setup > Object Manager

## Execution Detail

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  
Restriction Rules  
Scoping Rules

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

**Data Type**

None Selected  
 Auto Number  
 Formula  
 Roll Up Summary  
 Lookup Relationship  
 Master-Detail Relationship  
 External Lookup Relationship  
 Checkbox  
 Currency  
 Date  
 DateTime

Select one of the data types below.

A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.  
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.  
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.  
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.  
Creates a specific 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.  
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 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, that date and the current time are entered into the Date/Time field.

Setup Home Object Manager

SETUP > OBJECT MANAGER  
Execution Detail

Execution Detail New Relationship

Step 2. Choose the related object Step 2 of 6

Select the other object to which this object is related.

Related To Task

Help for this Page

Previous Next Cancel

Snipping Tool Screenshot copied to clipboard Automatically saved to screenshots folder. Markup and share

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 Restriction Rules Scoping Rules

Setup Home Object Manager

SETUP > OBJECT MANAGER  
Execution Detail

Execution Detail New Relationship

Step 3. Enter the label and name for the lookup field Step 3 of 6

Field Label Task

Field Name Task

Description

Help Text

Child Relationship Name Execution\_Details

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

Help for this Page

Previous 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 Restriction Rules Scoping Rules

The screenshot shows the Salesforce Setup interface under the Object Manager. The left sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The main content area is titled "Execution Detail New Relationship". A sub-header "Step 4. Establish field-level security for reference field" is displayed. The page shows field-level settings for a Master-Detail relationship, specifically for the "Task" field. It includes columns for Field Label, Data Type, Field Name, and Description. Below this, a table lists profiles and their visibility and read-only status. The table has columns for Visible and Read Only.

Field Level Security for Profile	Visible	Read Only
Analytics Cloud Integration User	✓	□
Analytics Cloud Security User	✓	□
Anypoint Integration	✓	□
Authenticated Website	✓	□
Authenticated Website	✓	□
B2B Reordering Portal Buyer Profile	✓	□
Contract Manager	✓	□
Cross Org Data Proxy User	✓	□
Custom: Marketing Profile	✓	□

The screenshot shows the Salesforce Setup interface under the Object Manager. The left sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The main content area is titled "Execution Detail New Relationship". A sub-header "Step 5. Add reference field to Page Layouts" is displayed. The page shows the "Task" field being added to a page layout named "Execution Detail Layout". The "Add Field" button is checked, and the "Page Layout Name" dropdown contains "Execution Detail Layout". The sub-header "Step 5 of 6" is visible at the top right.

Setup > Object Manager

## Execution Detail

**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
- Restriction Rules
- Scoping Rules

**New Relationship**

**Step 6. Add custom related lists**

Field Label: Task  
Data Type: Master-Detail  
Field Name: Task  
Description:

Specify the title that the related list will have in all of the layouts associated with the parent.  
Related List Label: Execution Details

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: Task Layout

Append related list to users' existing personal customizations

Help for this Page

Step 6 of 6

Previous Save & New Save Cancel

Setup > Object Manager

## Execution Detail

**Fields & Relationships**

5 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Execution Detail Name	Name	Text(80)		
Last Modified By	LastModifiedById	Lookup(User)		
Task	Task__c	Master-Detail(Task)		
Volunteer	Volunteer__c	Master-Detail(Volunteer)		

Quick Find New Deleted Fields Field Dependencies Set History Tracking

The screenshot shows the Salesforce Setup interface under the Object Manager section for the 'Drop-Off Point' object. The left sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The main area is titled 'New Custom Field' and 'Step 1. Choose the field type'. It asks to specify the type of information the custom field will contain. A 'Data Type' section shows several options: 'None Selected' (selected), 'Auto Number', 'Formula', 'Roll-Up Summary', 'Lookup Relationship' (selected), 'Master-Detail Relationship', and 'External Lookup Relationship'. Each option has a detailed description below it.

The screenshot shows the Salesforce Setup interface under the Object Manager section for the 'Drop-Off Point' object. The left sidebar lists various setup categories. The main area is titled 'New Relationship' and 'Step 2. Choose the related object'. It asks to select the other object to which this object is related. A dropdown menu labeled 'Related To' shows 'Venue' selected. Navigation buttons 'Previous', 'Next', and 'Cancel' are visible at the bottom right.

The screenshot shows the Salesforce Setup interface under the Object Manager for the 'Drop-Off Point' object. The left sidebar is titled 'Fields & Relationships'. The main panel is titled 'Drop-Off Point New Relationship' and 'Step 3. Enter the label and name for the lookup field'. The 'Field Label' is set to 'Venue', and the 'Field Name' is also 'Venue'. The 'Child Relationship Name' is 'Drop\_Off\_Points1'. Under 'What do if the lookup record is deleted?', the 'Clear the value of this field' option is selected. Under 'Auto add to custom report type', the 'Add this field to existing custom report types that contain this entity' checkbox is checked. The status bar at the bottom indicates 'Step 3 of 6'.

The screenshot shows the Salesforce Setup interface under the Object Manager for the 'Drop-Off Point' object. The left sidebar is titled 'Fields & Relationships'. The main panel is titled 'Drop-Off Point' and shows the configuration of a new custom field. The 'Data Type' section is open, showing various options: 'None Selected' (selected), 'Auto Number', 'Formula', 'Roll-Up Summary', 'Lookup Relationship' (selected), 'Master-Detail Relationship', 'External Lookup Relationship', 'Checkbox', 'Currency', and 'Date'. The 'Lookup Relationship' section provides a detailed description of how it links the object to another object via a relationship field. The status bar at the bottom indicates 'Next | Cancel'.

The screenshot shows the Salesforce Setup interface for creating a new relationship. The left sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The main area is titled "Drop-Off Point New Relationship". Step 2, "Choose the related object", is active, showing a dropdown menu set to "Venue". Step 3, "Enter the label and name for the lookup field", is shown below, with "Sponsored By" entered in both the Field Label and Field Name fields. Other settings include "Child Relationship Name" as "Drop\_Off\_Points1", "Required" checked, and "Clear the value of this field" selected. A "Lookup Filter" section is at the bottom.

This screenshot continues the relationship setup. It shows Step 3 of 6, where the "Field Label" is "Sponsored By" and the "Field Name" is "Sponsored\_By". The "Description" and "Help Text" fields are empty. Under "Required", the "Clear the value of this field" option is selected. In the "What to do if the lookup record is deleted?" section, the "Clear the value of this field" option is selected. At the bottom, there are checkboxes for "Auto add to custom report type" and "Add this field to existing custom report types that contain this entity", with the latter being checked.

The screenshot shows the Salesforce Setup interface for creating a new relationship. The left sidebar is titled 'Fields & Relationships' under 'Drop-Off Point'. The main panel is titled 'New Relationship' and 'Step 4. Establish field-level security for reference field'. It displays the field details: Field Label 'Sponsored By', Data Type 'Lookup', Field Name 'Sponsored\_By', and Description. Below this, it asks to select profiles for field-level security. A table lists profiles with checkboxes for 'Visible' and 'Read-Only'. Most profiles have both checked.

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"/>
Anypoint Integration	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>

The screenshot shows the continuation of the relationship configuration process. The left sidebar remains the same. The main panel is titled 'Step 5. Add reference field to Page Layouts'. It displays the field details again and asks to select page layouts. Two checkboxes are shown: 'Add Field' and 'Page Layout Name', with 'Drop-Off Point Layout' selected. Navigation buttons 'Previous', 'Next', and 'Cancel' are at the bottom.

The screenshot shows the Salesforce Setup interface for creating a new relationship named "New Relationship" for the "Drop-Off Point" object. The "Fields & Relationships" tab is selected in the left sidebar. The main area displays Step 6 of 6, titled "Add custom related lists".

**Step 6. Add custom related lists**

**Field Label:** Sponsored By  
**Data Type:** Lookup  
**Field Name:** Sponsored\_By  
**Description:** Specify the title that the related list will have in all of the layouts associated with the parent.  
**Related List Label:** Drop-Off Points (Sponsoree)

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:**  
 Venu Layout  
 Append related list to users' existing personal customizations

Buttons at the bottom: Previous, Save & New, Save, Cancel

The screenshot shows the Salesforce Setup interface displaying the list of fields and relationships for the "Drop-Off Point" object. The "Fields & Relationships" tab is selected in the left sidebar. The main area shows a table titled "Fields & Relationships" with 6 items, sorted by Field Label.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Drop-Off Point Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Sponsored By	Sponsored_By__c	Lookup(Venue)		✓
Venue	Venue__c	Lookup(Venue)		✓

Buttons at the top right: Quick Find, New, Deleted Fields, Field Dependencies, Set History Tracking

Buttons at the bottom: Previous, Save & New, Save, Cancel

Setup > OBJECT MANAGER

## Task

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  
Restriction Rules  
Scoping Rules

### New Custom Field

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 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.  
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 always represents 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.

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

External Lookups Relationship

Help for this Page

Step 1  
Next | Cancel

Setup > OBJECT MANAGER

## Task

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  
Restriction Rules  
Scoping Rules

### New Relationship

Step 2. Choose the related object

Select the other object to which this object is related.

Related To

Previous | Next | Cancel

SETUP > OBJECT MANAGER

## Task

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  
Restriction Rules  
Scoping Rules

Details

New Relationship

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

Field Label: Drop-Off Point  
Field Name: Drop\_Off\_Point  
Description:  
Help Text:  
Child Relationship Name: Tasks  
Required:  Always require a value in this field in order to save a record  
 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

Step 3 of 6

Previous Next Cancel

SETUP > OBJECT MANAGER

## Task

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  
Restriction Rules  
Scoping Rules

Details

New Relationship

Step 4. Establish field-level security for reference field

Field Label: Drop-Off Point  
Data Type: Lookup  
Field Name: Drop\_Off\_Point  
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
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Anypoint Integration	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Step 4 of 6

Previous Next Cancel

Setup > OBJECT MANAGER

## Task

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
- Restriction Rules
- Scoping Rules

Task  
New Relationship

Step 5. Add reference field to Page Layouts Step 5 of 6

Field Label: Drop-Off Point  
Data Type: Lookup  
Field Name: Drop\_Off\_Point  
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  
 Task Layout

Previous Next Cancel

Setup > OBJECT MANAGER

## Task

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
- Restriction Rules
- Scoping Rules

Task  
New Relationship

Step 6. Add custom related lists Step 6 of 6

Field Label: Drop-Off Point  
Data Type: Lookup  
Field Name: Drop\_Off\_Point  
Description:

Specify the title that the related list will have in all of the layouts associated with the parent.  
Related List Label: Tasks

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  
 Drop-Off Point Layout

Append related list to users' existing personal customizations

Previous Save & New Save Cancel

Setup Home Object Manager

SETUP > OBJECT MANAGER Task

Details Fields & Relationships

Fields & Relationships 6 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		✓
Drop-Off Point	Drop_Off_Point__c	Lookup(Drop-Off Point)		✓
Last Modified By	LastModifiedById	Lookup(User)		✓
Owner	OwnerId	Lookup(User,Group)		✓
Task Name	Name	Text(80)		✓
Venue	Venue__c	Lookup(Venue)		✓

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 Restriction Rules Scoping Rules

Setup Home Object Manager

SETUP > OBJECT MANAGER

Object Manager 1 Items, Sorted by Label

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Venue	Venue__c	Custom Object		9/6/2025	✓

The screenshot shows the Salesforce Setup interface for the 'Venue' object. The left sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The main content area displays a list of field types with their descriptions:

Field Type	Description
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.
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 any combination of letters and numbers and store them in encrypted form.
Text (Encrypted)	Allows users to enter a local time. For example, '2:40 PM', '14:40', '14:40 00', and '14:40:50:60' are all valid times for this field.
Time	Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.
URL	

The screenshot shows the 'New Custom Field' configuration page for the 'Venue' object. The left sidebar lists various setup categories. The main content area is titled 'Step 2. Enter the details' and includes fields for:

- Field Label: Conact Email
- Field Name: Conact\_Email
- Description: (empty)
- Help Text: (empty)
- Required:  Always require a value in this field in order to save a record
- Unique:  Do not allow duplicate values
- External ID:  Set this field as the unique record identifier from an external system
- Auto add to custom report type:  Add this field to existing custom report types that contain this entity
- Default Value: Show Formula Editor

A note at the bottom states: "Use formula syntax. Enclose text and picklist value API names in double quotes: ('The\_Text'), include numbers without quotes (25), show percentages as decimals (0.10), and express date calculations in the standard format (Today() + 7). To reference a field from a Custom Metadata type record use \$CustomMetadataType\_\_Name\_\_Field\_\_c".

Setup | Home | Object Manager

SETUP > OBJECT MANAGER  
Venue

### New Custom Field

Step 3. Establish field-level security

Step 3 of 4

Field Label: Conact Email  
Data Type: Email  
Field Name: Conact\_Email  
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"/>
Ampoint Integration	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Einstein Agent User	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Help for this Page

Setup | Home | Object Manager

SETUP > OBJECT MANAGER  
Venue

### New Custom Field

Step 4. Add to page layouts

Step 4 of 4

Field Label: Conact Email  
Data Type: Email  
Field Name: Conact\_Email  
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  
 Venu Layout

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

Previous | Save & New | Save | Cancel

Setup > Object Manager

## Venue

Details

**Fields & Relationships**

9 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Contact Email	Contact_Email__c	Email		
Contact Email	Contact_Email__c	Email		
Contact Phone	Contact_Phone__c	Phone		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Location	Location__c	Geolocation		
Owner	OwnerId	Lookup(User,Group)		✓
Venu Name	Name	Text(80)		✓
Venue Location	Venue_Location__c	Long Text Area(32768)		

Quick Find New Deleted Fields Field Dependencies Set History Tracking

Setup > Object Manager

## Venue

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

Restriction Rules

Scoping Rules

- Date
- Date/Time
- Email
- Geolocation
- Number
- Percent
- Phone
- Picklist
- Picklist (Multi-Select)
- Text
- Text Area
- Text Area (Long)
- Text Area (Rich)
- Text (Encrypted) (1)
- Time
- URL

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, that date and the current time are 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 lead, users 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 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.

Allows users to enter any combination of letters and numbers.

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

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

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

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

Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:56.600" are all valid times for this field.

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

Setup > OBJECT MANAGER

## Venue

**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
- Restriction Rules
- Scoping Rules

### New Custom Field

Step 2. Enter the details Step 2 of 4

Field Label	<input type="text" value="Contact Phone"/>
Field Name	<input type="text" value="Contact_Phone"/>
Description	<input type="text"/>
Help Text	<input type="text"/>
Required	<input type="checkbox"/> Always require a value in this field in order to save a record
Auto add to custom report type <input checked="" type="checkbox"/> Add this field to existing custom report types that contain this entity	
Default Value	<input type="button" value="Show Formula Editor"/>
<small>Use formula syntax: Enclose text and picklist value API names in double quotes: ("the_text"), include numbers without quotes (25), show percentages as decimals (.10), and express date calculations in the standard format (Today) + 7). To reference a field from a Custom Metadata type record use \$CustomMetadataType__Name__c</small>	

[Previous](#) [Next](#) [Cancel](#)

SETUP > OBJECT MANAGER

## Venue

**Fields & Relationships**

9 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Conact Email	Contact_Email_c	Email		
Contact Email	Contact_Email_c	Email		
Contact Phone	Contact_Phone_c	Phone		
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedBy	Lookup(User)		
Location	Location_c	Geolocation		
Owner	OwnerId	Lookup(User,Group)	✓	
Venu Name	Name	Text(80)	✓	
Venue Location	Venue_Location_c	Long Text Area(32768)		

The screenshot shows the Salesforce Setup interface for the 'Venue' object. The left sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The main content area displays a list of field types under 'Fields & Relationships'. Each field type has a description and a link to its details. The 'Geolocation' field is selected.

Field Type	Description
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.
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) <small>(Beta)</small>	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.

The screenshot shows the process of creating a new custom field for the 'Venue' object. The left sidebar shows standard setup categories. The main area is titled 'New Custom Field' and is on 'Step 2. Enter the details'. The field is named 'Location' with a decimal place setting of 4. Other settings include 'Latitude and Longitude Display Notation' set to 'Degrees, Minutes, Seconds', and 'Required' checked.

**Step 2. Enter the details**

Step 2 of 4

Previous Next Cancel

Field Label: Location (Help)

Enter the name of the location, such as Main Office. Be descriptive and specific, and remember that one record may have multiple locations, such as West Coast Sales Office and East Coast Sales Office.

Latitude and Longitude Display Notation:  Degrees, Minutes, Seconds  Decimal

Decimal Places: 4

Number of digits to the right of the decimal point:

Field Name: Location (Help)

Description:

Help Text:

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

Previous Next Cancel

Setup > Object Manager

## Venue

Details

**Fields & Relationships**

9 items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Conact Email	Conact_Email__c	Email		
Contact Email	Contact_Email__c	Email		
Contact Phone	Contact_Phone__c	Phone		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Location	Location__c	Geolocation		
Owner	OwnerId	Lookup(User,Group)	✓	
Venu Name	Name	Text(80)	✓	
Venue Location	Venue_Location__c	Long Text Area(32768)		

Setup > Object Manager

## Venue

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

Restriction Rules

Scoping Rules

- Date
- Date/Time
- Email
- Geolocation
- Number
- Percent
- Phone
- Picklist
- Picklist (Multi-Select)
- Text
- Text Area
- Text Area (Long)
- Text Area (Rich)
- Text (Encrypted) ?
- Time
- URL

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, that date and the current time are 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 lead, users 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 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.

Allows users to enter any combination of letters and numbers.

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

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

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

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

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.

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

The screenshot shows the Salesforce Setup interface for creating a new custom field. The object being configured is 'Venue'. The left sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The main area is titled 'New Custom Field' and 'Step 2. Enter the details'. The 'Field Label' is set to 'Venue Location'. The 'Length' is specified as 32,768, which is noted as being 32,768 out of 1,638,400 characters available. The 'Field Name' is 'Venue\_Location'. Other settings include '# Visible Lines' (3), 'Description' (empty), and 'Help Text' (empty). A checkbox for 'Auto add to custom report type' is checked, and a note says 'Add this field to existing custom report types that contain this entity'. The status bar at the bottom indicates 'Step 2 of 4'.

The screenshot shows the Salesforce Setup interface displaying the list of fields for the 'Venue' object. The left sidebar shows the 'Fields & Relationships' section selected. The main area is titled 'Fields & Relationships' and shows a table of 9 items. The table columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Conact Email	Conact_Email__c	Email		
Contact Email	Contact_Email__c	Email		
Contact Phone	Contact_Phone__c	Phone		
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedBy	Lookup(User)		
Location	Location__c	Geolocation		
Owner	OwnerId	Lookup(User,Group)		✓
Venu Name	Name	Text(80)		✓
Venue Location	Venue_Location__c	Long Text Area(32768)		

Setup > OBJECT MANAGER  
Drop-Off Point

**Fields & Relationships**  
6 items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Drop-Off Point Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		✓
Owner	OwnerId	Lookup(User,Group)		✓
Sponsored By	Sponsored_By__c	Lookup(Venue)		✓
Venue	Venue__c	Lookup(Venue)		✓

Setup > OBJECT MANAGER  
Drop-Off Point

**Fields & Relationships**

- 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 edits the master record, all detail records are deleted.
  - You can create rollup summary fields on the master record to summarize the detail records.
- 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.
- DateTime
- 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.

Setup > OBJECT MANAGER  
Drop-Off Point

**Drop-Off Point**  
**New Custom Field**

**Step 2. Enter the details** Step 2 of 4

Field Label	Location 2	Help for this Page
Enter the name of the location, such as Main Office. Be descriptive and specific, and remember that one record may have multiple locations, such as West Coast Sales Office and East Coast Sales Office.		
Latitude and Longitude Display Notation	<input checked="" type="radio"/> Degrees, Minutes, Seconds	<input type="radio"/> Decimal
Decimal Places	4	Number of digits to the right of the decimal point
Field Name	Location_2	Description
Help Text		
Required	<input type="checkbox"/> Always require a value in this field in order to save a record	

Previous Next Cancel

Setup > OBJECT MANAGER  
Drop-Off Point

**Drop-Off Point**  
**New Custom Field**

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

Field Label	Location 2	Help for this Page
Data Type	Geolocation	
Field Name	Location_2	
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
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Anypoint Integration	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Authenticated Website	<input type="checkbox"/>	<input type="checkbox"/>
Authenticated Website	<input type="checkbox"/>	<input type="checkbox"/>
B2B Reordering Portal Buyer Profile	<input type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Previous Next Cancel

SETUP > OBJECT MANAGER

**Drop-Off Point**

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

Restriction Rules

Scoping Rules

Drop-Off Point  
New Custom Field

Step 4. Add to page layouts Step 4 of 4

Field Label: Location 2  
Data Type: Geolocation  
Field Name: Location\_2  
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  
 Drop-Off Point Layout

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

Previous Save & New Save Cancel

SETUP > OBJECT MANAGER

**Drop-Off Point**

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

Restriction Rules

Scoping Rules

Drop-Off Point  
New Custom Field

Step 1 Step 1

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 pop-up 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 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.

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

Next Cancel

**Step 2. Choose output type**

Field Label:  Field Name:

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

**Formula Return Type**

- None Selected
- Checkbox
- Currency
- Date
- Datetime
- Number
- Percent
- Text
- Time

Select one of the data types below:

- Calculate a boolean value  
Example: `TODAY() > CloseDate`
- Calculate a dollar or other currency amount and automatically format the field as a currency amount.  
Example: `Gross Margin = Amount - Cost__c`
- Calculate a date for example, by adding or subtracting days to other dates.  
Example: `Reminder Date = CloseDate - 7`
- Calculate a datetime, for example, by adding a number of hours or days to another datetime.  
Example: `Next = NOW() + 1`
- Calculate a numeric value.  
Example: `Fahrenheit = 1.8 * Celsius__c + 32`
- Calculate a percent and automatically add the percent sign to the number.  
Example: `Discount = (Amount - Discounted_Amount__c) / Amount`
- Create a text string, for example, by concatenating other text fields.  
Example: `Full Name = LastName & ", " & FirstName`
- Calculate a time, for example, by adding a number of hours to another time.

**Step 3. Enter formula**

Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula subtab to use additional fields, operators, and functions.

Example: `Fahrenheit = 1.8 * Celsius__c + 32` [More Examples](#)

Simple Formula Advanced Formula

Select Field Type:  Drop-Off Point

Insert Operator:

**New Custom Field**

Help for this Page

Quick Tips

- Getting Started
- Operators & Functions

distance calculation (Number) = DISTANCE( Location\_\_c, Venue\_\_r.Location\_\_c, 'km')

Setup > Object Manager

## Drop-Off Point

**New Custom Field**

**Step 4. Establish field-level security**

Field Label: distance calculation  
 Data Type: Formula  
 Field Name: distance\_calculation  
 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
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	✓
Analytics Cloud Security User	<input checked="" type="checkbox"/>	✓
AnyPoint Integration	<input checked="" type="checkbox"/>	✓
Authenticated Website	<input type="checkbox"/>	✓
Authenticated Website	<input type="checkbox"/>	✓
B2B Reordering Portal Buyer Profile	<input type="checkbox"/>	✓
Contract Manager	<input checked="" type="checkbox"/>	✓
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	✓

Help for this Page

Setup > Object Manager

## Drop-Off Point

**Fields & Relationships**

Page Layouts

**Field Types**

- Date
- Date/Time
- Email
- Geolocation
- Number
- Percent
- Phone
- Picklist
- Picklist (Multi-Select)
- Text
- Text Area
- Text Area (Long)
- Text Area (Rich)
- Text (Encrypted) 1
- Time
- URL

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, that date and the current time are 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 lead, users 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 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.  
 Allows users to enter any combination of letters and numbers.  
 Allows users to enter up to 255 characters on separate lines.  
 Allows users to enter up to 131,072 characters on separate lines.  
 Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.  
 Allows users to enter any combination of letters and numbers and store them in encrypted form.  
 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.  
 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

Setup > OBJECT MANAGER

## Drop-Off Point

**New Custom Field**

Step 2. Enter the details

Field Label: State

Values:

- Use global picklist value set
- Enter values, with each value separated by a new line

Andhra Pradesh  
Arunachal Pradesh  
Assam  
Bihar

Display values alphabetically, not in the order entered

Use first value as default value

Restrict picklist to the values defined in the value set

Field Name: State

Description:

Help for this Page

Step 2 of 4

Previous Next Cancel

Setup > OBJECT MANAGER

## Drop-Off Point

**New Custom Field**

Step 3. Establish field-level security

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"/>
Anypoint Integration	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Authenticated Website	<input type="checkbox"/>	<input type="checkbox"/>
Authenticated Website	<input type="checkbox"/>	<input type="checkbox"/>
B2B Reordering Portal Buyer Profile	<input type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<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.

Help for this Page

Step 3 of 4

Previous Next Cancel

The screenshot shows the Salesforce Setup interface for creating a new custom field. The left sidebar is titled 'Object Manager' and lists various setup categories. The main area is titled 'Drop-Off Point' and shows the 'New Custom Field' configuration screen. The field is defined with the following details:

- Field Label:** State
- Data Type:** Picklist
- Field Name:** State
- Description:** (empty)

The current step is 'Step 4. Add to page layouts'. It displays the configuration for adding the field to page layouts. The 'Page Layout Name' dropdown is set to 'Drop-Off Point Layout'. The 'Add Field' checkbox is checked. The status bar at the bottom indicates 'Step 4 of 4'.

The screenshot shows the 'Fields & Relationships' section of the Salesforce Setup interface. The left sidebar lists various setup categories. The main area is titled 'Drop-Off Point' and shows a list of field types:

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

Each field type has a brief description to its right. For example, the 'Number' type allows users to enter any number with leading zeros removed. The 'Percent' type allows users to enter a percentage number with a percent sign added. The 'Phone' type automatically formats phone numbers. The 'Picklist' type allows users to select values from a list defined by the user.

Setup Home Object Manager

### Drop-Off Point

**Step 2. Enter the details**

Field Label: Distance

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:	14	Decimal Places:	4
Field Name:	Distance	Number of digits to the right of the decimal point	
Description:			
Help Text:			

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

Unique:  Do not allow duplicate values

External ID:  Set this field as the unique record identifier from an external system

AI Prediction:  Use this field to store AI prediction scores

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

Default Value: Show Formula Editor

Step 2 of 4 Previous Next Cancel

Setup Home Object Manager

### Drop-Off Point

**New Custom Field**

**Step 3. Establish field-level security**

Field Label: Distance  
Data Type: Number  
Field Name: Distance  
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
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Anypoint Integration	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Step 3 of 4 Previous Next Cancel

Setup > OBJECT MANAGER

## Drop-Off Point

**Drop-Off Point**

**New Custom Field**

**Step 4. Add to page layouts**

Field Label: Distance  
 Data Type: Number  
 Field Name: Distance  
 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  
 Drop-Off Point Layout

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

Help for this Page

Previous Save & New Save Cancel

Setup > OBJECT MANAGER

## Task

**Fields & Relationships**

6 items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Drop-Off Point	Drop_Off_Point__c	Lookup(Drop-Off Point)	✓	▼
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)	✓	
Task Name	Name	Text(80)	✓	▼
Venue	Venue__c	Lookup(Venue)	✓	▼

Quick Find New Deleted Fields Field Dependencies Set History Tracking

The screenshot shows the Salesforce Setup interface for creating a new custom field. The left sidebar is titled 'Task' and lists various setup categories under 'Fields & Relationships'. The main pane is titled 'New Custom Field' and is on 'Step 1. Choose the field type'. It asks to specify the type of information the custom field will contain. Under 'Data Type', 'Auto Number' is selected, which is described as a system-generated sequence number. Other options like 'Formula' and 'Roll Up Summary' are also listed with their descriptions.

The screenshot shows the Salesforce Setup interface continuing the creation of a new custom field. The left sidebar remains the same. The main pane is now on 'Step 2. Enter the details'. It allows entering the field's label ('Task ID'), display format ('TASK-[0]'), starting number (1), field name ('task\_ID'), and description. It also includes help text and checkboxes for external ID and adding it to report types. The status bar at the bottom indicates 'Step 2 of 4'.

Setup Home Object Manager

SETUP > OBJECT MANAGER Task

Task New Custom Field

Step 3. Establish field-level security

Field Label: Task ID  
Data Type: Auto Number  
Field Name: Task\_ID  
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.

	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Anypoint Integration	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Help for this Page

Step 3 of 4 Previous 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 Restriction Rules Scoping Rules

Setup Home Object Manager

SETUP > OBJECT MANAGER Task

Task New Custom Field

Step 4. Add to page layouts

Field Label: Task ID  
Data Type: Auto Number  
Field Name: Task\_ID  
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  
 Task Layout

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

Previous Save & New Save 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 Restriction Rules Scoping Rules

Setup > Object Manager

## Task

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
- Restriction Rules
- Scoping Rules

Formula

Roll-Up Summary

Lookup Relationship

Master-Detail Relationship

External Lookup Relationship

Checkbox

Currency

Date

Date/Time

Email

Geolocation

Number

Percent

Phone

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.

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.

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 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 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 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.

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.

Setup > Object Manager

## Task

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
- Restriction Rules
- Scoping Rules

New Custom Field

Step 2. Enter the details

Field Label: Date

Field Name: Date

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: Show Formula Editor

Use formula syntax. Enclose text and point value API names in double quotes ('The\_Text'). Include numbers without quotes ('10'). Use \$RecordId to reference a record ID and \$RecordType to reference a record type. Use \$CustomMetadataType\_\_r to reference a field from a Custom Metadata type record use \$CustomMetadataType\_\_r.mettRecordAPIName Field\_\_c

Step 2 of 4

Previous Next Cancel

Cloud icon

Setup Home Object Manager

SETUP > OBJECT MANAGER Task

New Custom Field

Step 3 of 4

Field Label: Date  
Data Type: Date  
Field Name: 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.

	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"/>
Anypoint Integration	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Previous Next Cancel Help for this Page

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  
Restriction Rules  
Scoping Rules

Cloud icon

Setup Home Object Manager

SETUP > OBJECT MANAGER Task

New Custom Field

Step 4 of 4

Field Label: Date  
Data Type: Date  
Field Name: 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	Page Layout Name
<input checked="" type="checkbox"/>	Task Layout

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

Previous Save & New Save 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  
Restriction Rules  
Scoping Rules

The screenshot shows the Salesforce Setup interface with the following details:

- Header:** Includes the Salesforce logo, "Setup", "Home", "Object Manager", and various navigation icons.
- Breadcrumbs:** "SETUP > OBJECT MANAGER".
- Section:** "Task".
- Left Sidebar:** "Fields & Relationships" is selected. Other options include Details, 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, Restriction Rules, and Scoping Rules.
- Content Area:** A list of field types:
  - External Lookup Relationship
  - Checkbox
  - Currency
  - Date
  - Date/Time
  - Email
  - Geolocation
  - Number
  - Percent
  - Phone
  - Picklist (selected)
  - Picklist (Multi-Select)
  - Text
  - Text Area
  - Text Area (Long)
  - Text Area (Rich)
  - Text (Encrypted)Each item has a brief description of its function.

The screenshot shows the Salesforce Setup interface for creating a new custom field:

- Header:** Includes the Salesforce logo, "Setup", "Home", "Object Manager", and various navigation icons.
- Breadcrumbs:** "SETUP > OBJECT MANAGER".
- Section:** "Task".
- Left Sidebar:** "Fields & Relationships" is selected. Other options are the same as the first screenshot.
- Content Area:** "New Custom Field" wizard, Step 2: Enter the details.
  - Field Label:** "Food Category".
  - Values:** Radio button selected: "Enter values, with each value separated by a new line".
    - Input area showing: "Veg", "Non-Veg", "Salad", "Snack".
    - Checkboxes:
      - Display values alphabetically, not in the order entered
      - Use first value as default value
      - Restrict picklist to the values defined in the value set (checked)
  - Field Name:** "Food\_Category".
  - Description:** (empty input field).
  - Help Text:** (empty input field).

Setup Home Object Manager

SETUP > OBJECT MANAGER Task

New Custom Field

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

Field Label: Food Category  
Data Type: Picklist  
Field Name: Food\_Category  
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
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Apexpoint Integration	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Help for this Page

Previous Next Cancel

Setup Home Object Manager

SETUP > OBJECT MANAGER Task

New Custom Field

Step 4. Add to page layouts Step 4 of 4

Field Label: Food Category  
Data Type: Picklist  
Field Name: Food\_Category  
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  
 Task Layout

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

Previous Save & New Save Cancel

Setup Home Object Manager

SETUP > OBJECT MANAGER Task

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 Restriction Rules Scoping Rules

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.

External Lookup Relationship 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.

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.

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.

Setup Home Object Manager

SETUP > OBJECT MANAGER Task

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 Restriction Rules Scoping Rules

New Custom Field Step 2. Enter the details Step 2 of 4 Previous Next Cancel

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  Number of digits to the left of the decimal point  Decimal Places  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

Unique  Do not allow duplicate values

External ID  Set this field as the unique record identifier from an external system

AI Prediction  Use this field to store AI prediction scores

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

Setup | Home | Object Manager

SETUP > OBJECT MANAGER  
Task

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  
Restriction Rules  
Scoping Rules

New Custom Field

Step 3. Establish field-level security

Field Label: Number of People Served  
Data Type: Number  
Field Name: Number\_of\_People\_Served  
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"/>
Apexpoint Integration	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Help for this Page

Setup | Home | Object Manager

SETUP > OBJECT MANAGER  
Task

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  
Restriction Rules  
Scoping Rules

New Custom Field

Step 4. Add to page layouts

Field Label: Number of People Served  
Data Type: Number  
Field Name: Number\_of\_People\_Served  
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   
 Task Layout

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

Previous | Save & New | Save | Cancel

The screenshot shows the Salesforce Setup interface with the following details:

**Setup > OBJECT MANAGER**

**Task**

**Fields & Relationships**

**Details**

**Fields & Relationships** (selected)

**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**

**Restriction Rules**

**Scoping Rules**

**spreadsheet**

Date

Date/Time

Email

Geolocation

Number

Percent

Phone

Picklist

Text

Text Area

Text Area (Long)

Text Area (Rich)

Text (Encrypted) 1

Time

URL

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, that date and the current time are 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 lead, users 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 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.

Allows users to enter any combination of letters and numbers.

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

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

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

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

Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:50:60" are all valid times for this field.

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**

The screenshot shows the Salesforce Setup interface with the following details:

**Setup > OBJECT MANAGER**

**Task**

**Details**

**Fields & Relationships** (selected)

**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**

**Restriction Rules**

**Scoping Rules**

**New Custom Field**

**Step 2. Enter the details**

**Field Label**: Number of People Served 1

Please enter the maximum length for a text field below.

**Length**:

**Field Name**: Number\_of\_People\_Served 1

**Description**:

**Help Text**:

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

**Unique**:  Do not allow duplicate values

Treat "ABC" and "abc" as duplicate values (case insensitive)

Treat "ABC" and "abc" as different values (case sensitive)

**External ID**:  Set this field as the unique record identifier from an external system

**Auto add to custom report type**:  Add this field to existing custom report types that contain this entity 1

**Step 2 of 4**

**Previous** **Next** **Cancel**

Setup > Object Manager

## Task

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

Restriction Rules

Scoping Rules

Date

Date/Time

Email

Geolocation

Number

Percent

Phone

Picklist

Picklist (Multi Select)

**Text**

Text Area

Text Area (Long)

Text Area (Rich)

Text (Encrypted) 1

Time

URL

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, that date and the current time are 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 lead, users 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 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.

Allows users to enter any combination of letters and numbers.

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

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

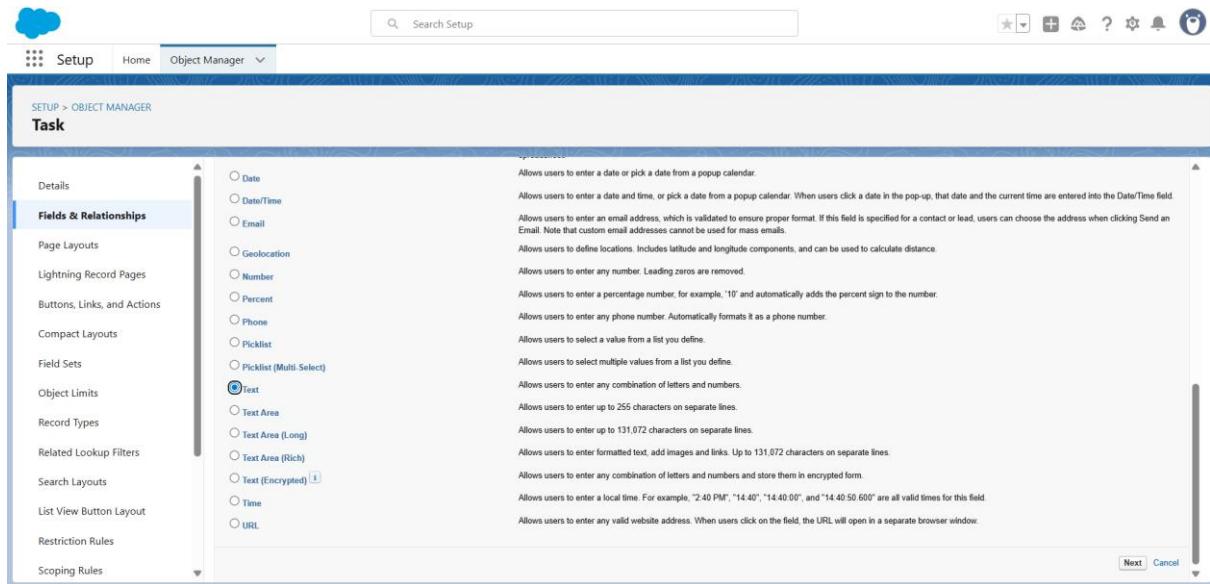
Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.

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

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.

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



Setup > Object Manager

## Task

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

Restriction Rules

Scoping Rules

New Custom Field

Step 2. Enter the details

Help for this Page ?

Step 2 of 4

Previous Next Cancel

Field Label  1

Please enter the maximum length for a text field below.

Length

Field Name  1

Description

Help Text

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

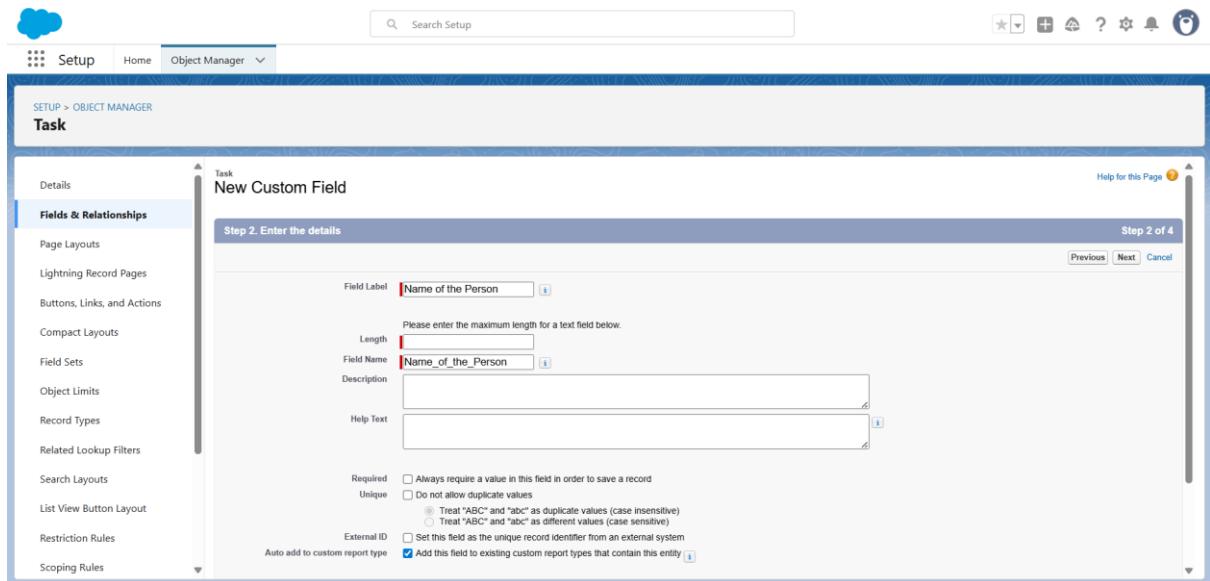
Unique  Do not allow duplicate values

Treat "ABC" and "abc" as duplicate values (case insensitive)

Treat "ABC" and "abc" as different values (case sensitive)

External ID  Set this field as the unique record identifier from an external system

Auto add to custom report type  Add this field to existing custom report types that contain this entity 1



Setup > Object Manager

## Task

New Custom Field

Step 3. Establish field-level security

Field Label: Name of the Person  
Data Type: Text  
Field Name: Name\_of\_the\_Person  
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
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Anypoint Integration	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Help for this Page

Step 3 of 4

Previous Next Cancel

Setup > Object Manager

## Task

New Custom Field

Step 4. Add to page layouts

Field Label: Name of the Person  
Data Type: Text  
Field Name: Name\_of\_the\_Person  
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  
 Task Layout

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

Help for this Page

Step 4 of 4

Previous Save & New Save Cancel

The screenshot shows the Salesforce Setup interface with the following details:

**Setup > Object Manager**

**Task**

**Fields & Relationships**

**Details**

**Fields & Relationships** (selected)

**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**

**Restriction Rules**

**Scoping Rules**

**Phone** (selected)

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 enter any combination of letters and numbers.

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

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

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

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

Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:50:60" are all valid times for this field.

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**

The screenshot shows the Salesforce Setup interface during the creation of a new custom field:

**Setup > Object Manager**

**Task**

**Details**

**Fields & Relationships** (selected)

**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**

**Restriction Rules**

**Scoping Rules**

**New Custom Field**

**Step 2. Enter the details**

**Step 2 of 4**

**Field Label**: Phone

**Field Name**: Phone

**Description**: (empty)

**Help Text**: (empty)

**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**: Show Formula Editor

Use formula syntax. Enclose text and picklist value API names in double quotes. ("the\_text"), include numbers without quotes (25), show percentages as decimals (.10), and express date calculations in the standard format ("Today") + 7). To reference a field from a Custom Metadata type record use: \$CustomMetadataType\_\_mdt RecordAPIName.Field\_\_c

**Previous** | **Next** | **Cancel**

Setup Home Object Manager

SETUP > OBJECT MANAGER Task

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 Restriction Rules Scoping Rules

New Custom Field Step 3 of 4

Field Label: Phone  
Data Type: Phone  
Field Name: Phone  
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
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Anypoint Integration	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Authenticated Website	<input type="checkbox"/>	<input type="checkbox"/>
Authenticated Website	<input type="checkbox"/>	<input type="checkbox"/>
B2B Reordering Portal Buyer Profile	<input type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Help for this Page

Setup Home Object Manager

SETUP > OBJECT MANAGER Task

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 Restriction Rules Scoping Rules

New Custom Field Step 4 of 4

Field Label: Phone  
Data Type: Phone  
Field Name: Phone  
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  
 Task Layout

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

Previous Save & New Save Cancel

Setup > Object Manager

## Task

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
- Restriction Rules
- Scoping Rules

External Lookup Relationship  
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 popup calendar. When users click a date in the pop-up, that date and the current time are 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 lead, users 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 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.

Allows users to enter any combination of letters and numbers.

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

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

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

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

Allows users to enter a local time. For example, "9 AM", "14 AM", "14:45 PM", and "14:45:50:60" are all valid times for this field.

Setup > Object Manager

## Task

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
- Restriction Rules
- Scoping Rules

New Custom Field

Step 2. Enter the details

Help for this Page

Step 2 of 4

Previous Next Cancel

Field Label: Rating

Values:

- Use global picklist value set
- Enter values, with each value separated by a new line

2  
3  
4  
5

Display values alphabetically, not in the order entered

Use first value as default value

Restrict picklist to the values defined in the value set

Field Name: Rating

Description:

**Task**

**New Custom Field**

**Step 3. Establish field-level security**

Field Label: Rating  
Data Type: Picklist  
Field Name: Rating  
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
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
AnyPoint Integration	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>

**Step 3 of 4**

Previous Next Cancel

**Task**

**New Custom Field**

**Step 4. Add to page layouts**

Field Label: Rating  
Data Type: Picklist  
Field Name: Rating  
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  
 Task 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

**Task**

**Fields & Relationships**

Page Layouts

**Field Types**

- Date
- Date/Time
- Email
- Geolocation
- Number
- Percent
- Phone
- Picklist
- Picklist (Multi-Select)
- Text
- Text Area
- Text Area (Long)
- Text Area (Rich)
- Text (Encrypted) 1
- Time
- URL

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, that date and the current time are 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 lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.  
 Allows users to define location. 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 enter any combination of letters and numbers.  
 Allows users to enter up to 255 characters on separate lines.  
 Allows users to enter up to 131,072 characters on separate lines.  
 Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.  
 Allows users to enter any combination of letters and numbers and store them in encrypted form.  
 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.  
 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**

Setup > OBJECT MANAGER Task

### New Custom Field

Step 2. Enter the details Step 2 of 4

Field Label: Feedback

Length: 32,768 (Max 131,072)

# Visible Lines: 3

Field Name: Feedback

Description:

Help Text:

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

Default Value: Show Formula Editor

Setup > OBJECT MANAGER Task

### New Custom Field

Step 4. Add to page layouts Step 4 of 4

Field Label: Feedback  
Data Type: Long Text Area  
Field Name: Feedback  
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  
 Task Layout

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

Setup > OBJECT MANAGER Volunteer

### Fields & Relationships

4 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Drop-Off Point	Drop_Off_Point_c	Master-Detail(Drop-Off Point)	✓	▼
Last Modified By	LastModifiedById	Lookup(User)		
Volunteer Name	Name	Text(80)	✓	▼

Setup Home Object Manager

### Volunteer

**New Custom Field**

**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 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 relationship that links this object to another object whose data is stored outside the Salesforce.org.

[External Lookups Relationship](#)

Help for this Page

Setup Home Object Manager

### Volunteer

**New Custom Field**

**Step 2. Enter the details**

Field Label

Display Format  Example: A-{0000} [What is This?](#)

Starting Number

Generate Auto Number for existing records

Field Name

Description

Help Text

External ID  Set this field as the unique record identifier from an external system

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

Previous Next Cancel

Setup Home Object Manager

### Volunteer

**New Custom Field**

**Step 3. Establish field-level security**

Field Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Anypoint Integration	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom Marketing Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom Sales Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom Support Profile	<input checked="" type="checkbox"/>	<input checked="" 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.

Help for this Page

**Volunteer New Custom Field**

**Step 4. Add to page layouts**

Field Label: Volunteer ID  
 Data Type: Auto Number  
 Field Name: Volunteer\_ID  
 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  
 Volunteer Layout

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

Help for this Page

Previous Save & New Save Cancel

**Volunteer**

**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
- Restriction Rules
- Scoping Rules

**External Lookup Relationship**

- 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 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 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 lead, users 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 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.
- Allows users to enter any combination of letters and numbers.
- Allows users to enter up to 255 characters on separate lines.
- Allows users to enter up to 131,072 characters on separate lines.

**Volunteer New Custom Field**

**Step 2. Enter the details**

Field Label: Gender  
 Values:
  Use global picklist value set  
 Enter values, with each value separated by a new line

Female
Male

Display values alphabetically, not in the order entered  
 Use first value as default value  
 Restrict picklist to the values defined in the value set  
 Field Name: Gender  
 Description:

Help for this Page

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SETUP > OBJECT MANAGER

## Volunteer

**Fields & Relationships**

- Page Layouts
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- Object Limits
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- Search Layouts
- List View Button Layout
- Restriction Rules
- Scoping Rules

**New Custom Field**

**Step 3. Establish field-level security**

Field Label: Gender  
Data Type: Picklist  
Field Name: Gender  
Description:

FieldLevel 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"/>
Anypoint Integration	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>

**Step 3 of 4**

Previous | Next | Cancel

SETUP > OBJECT MANAGER

## Volunteer

**Fields & Relationships**

- Page Layouts
- Lightning Record Pages
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- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules
- Scoping Rules

**New Custom Field**

**Step 4. Add to page layouts**

Field Label: Gender  
Data Type: Picklist  
Field Name: Gender  
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  
 Volunteer 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

SETUP > OBJECT MANAGER

## Volunteer

**Fields & Relationships**

- Page Layouts
- Lightning Record Pages
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- Search Layouts
- List View Button Layout
- Restriction Rules
- Scoping Rules

**spreadsheets**

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 location. 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 60" 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**

SETUP > OBJECT MANAGER  
**Volunteer**

**Fields & Relationships**

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Restriction Rules  
Scoping Rules

**New Custom Field**

**Step 2. Enter the details**

Field Label: Available On  
Field Name: Available\_On  
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: Show Formula Editor  
Use formula syntax: Enclose text and picklist value API names in double quotes: (`"the_text"`, include numbers without quotes (25), show percentages as decimals (0.10), and express date calculations in the standard format (Today) + 7). To reference a field from a Custom Metadata type record use: `CustomMetadata__Type__RecordName.FieldName`

**Step 2 of 4**

Previous Next Cancel

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**Volunteer**

**Fields & Relationships**

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Restriction Rules  
Scoping Rules

**New Custom Field**

**Step 3. Establish field-level security**

Field Label: Available On  
Data Type: Date  
Field Name: Available\_On  
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
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Anypoint Integration	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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Scoping Rules

**New Custom Field**

**Step 4. Add to page layouts**

Field Label: Available On  
Data Type: Date  
Field Name: Available\_On  
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  
 Volunteer 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

SETUP > OBJECT MANAGER  
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**Fields & Relationships**

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Restriction Rules

Scoping Rules

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.

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.

SETUP > OBJECT MANAGER  
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Details

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New Custom Field

Step 2. Enter the details

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Field Label: Age

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: 18

Number of digits to the left of the decimal point: 0

Decimal Places: 0

Number of digits to the right of the decimal point: 0

Field Name: Age

Description:

Help Text:

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

Unique:  Do not allow duplicate values

External ID:  Set this field as the unique record identifier from an external system

AI Prediction:  Use this field to store AI prediction scores

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

The screenshot shows the Salesforce Setup interface for the 'Volunteer' object. The left sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The 'Fields & Relationships' tab is selected. The main content area displays a list of field types with their descriptions:

- 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 pop-up list. The master object is the source of the values in the list.
- Master-Detail Relationship**: 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.
- 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 pop-up calendar.
- Date/Time**: 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 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 location. 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.

The screenshot shows the 'New Custom Field' configuration page for the 'Volunteer' object. The left sidebar lists various setup categories. The 'Fields & Relationships' tab is selected. The main content area shows 'Step 2. Enter the details' of a new custom field named 'Email'. The field is labeled 'Email' and has a description. It is set as required and unique. The 'Default Value' field contains a formula editor with the following syntax:

```
Use formula syntax: Enclose text and picklist value API names in double quotes : ("The_Text"), include numbers without quotes (25), show percentages as decimals (.10), and express date calculations in the standard format (Today() + 7). To reference a field from a Custom Metadata type record use: [CustomMetadata_Type__mdt Record API Name]!Field__c
```

Setup Home Object Manager

SETUP > OBJECT MANAGER  
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Volunteer  
New Custom Field  
Step 3. Establish field-level security  
Field Label: Email  
Data Type: Email  
Field Name: Email  
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  
Analytics Cloud Integration User   Visible  Read-Only  
Analytics Cloud Security User   Visible  Read-Only  
Anypoint Integration   Visible  Read-Only  
Contract Manager   Visible  Read-Only  
Cross Org Data Proxy User   Visible  Read-Only  
Custom: Marketing Profile   Visible  Read-Only  
Custom: Sales Profile   Visible  Read-Only  
Custom: Support Profile   Visible  Read-Only  
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Volunteer  
New Custom Field  
Step 4. Add to page layouts  
Field Label: Email  
Data Type: Email  
Field Name: Email  
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  
 Volunteer Layout  
When finished, click Save & New to create more custom fields, or click Save if you are done.  
Previous Save & New Save Cancel

The screenshot shows the Salesforce Setup interface for the 'Volunteer' object. The left sidebar lists various setup categories like Details, Page Layouts, Lightning Record Pages, etc. The 'Fields & Relationships' category is selected. On the right, a detailed list of field types is shown, each with a description:

- External Lookup Relationship: Allows users to 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 pop-up list. The master object is the source of the values in the list.
- Checkbox
- Currency
- Date
- Date/Time
- Email
- Geolocation
- Number (selected)
- Percent
- Phone
- Picklist
- Picklist (Multi-Select)
- Text
- Text Area
- Text Area (Long)
- Text Area (Rich)

Each field type has a brief description below it, such as 'Allows users to enter a date or pick a date from a popup calendar' for Date.

The screenshot shows the process of creating a new custom field named 'Contact Number' for the 'Volunteer' object. The left sidebar shows the 'Fields & Relationships' category is selected. The main area is titled 'New Custom Field' and 'Step 2. Enter the details'. The field label is set to 'Contact Number'. The length is set to 18, and decimal places are set to 0. The field name is also 'Contact Number'. The description is 'Double-check if this is correct'. The help text is 'Contact Number'. Under 'Required', there is a checkbox for 'Always require a value in this field in order to save a record'. Under 'Unique', there is a checkbox for 'Do not allow duplicate values'. Under 'External ID', there is a checkbox for 'Set this field as the unique record identifier from an external system'. Under 'AI Prediction', there is a checkbox for 'Use this field to store AI prediction scores'. At the bottom, there is a checkbox for 'Add this field to existing custom report types that contain this entity'.

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Volunteer  
New Custom Field

Step 3. Establish field-level security 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	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"/>
Anypoint Integration	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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Volunteer  
New Custom Field

Step 4. Add to page layouts Step 4 of 4

Field Label: Contact Number  
Data Type: Number  
Field Name: Contact\_Number  
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  
 Volunteer Layout

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

Previous Save & New Save Cancel

The screenshot shows the Salesforce Setup interface for the 'Volunteer' object. The left sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The 'Fields & Relationships' section is selected. On the right, a detailed list of field types is shown with their descriptions:

Field Type	Description
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 (Long)	Allows users to enter up to 255 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) <small>[i]</small>	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.

At the bottom right, there are 'Next' and 'Cancel' buttons.

The screenshot shows the process of creating a new custom field for the 'Volunteer' object. The left sidebar shows the 'Fields & Relationships' section. The main area is titled 'New Custom Field' and is on 'Step 2. Enter the details'. The field is named 'Address'.

Field Label: Address

Length: 32,768 (Max 131,072)

# Visible Lines: 3

Field Name: Address

Description: (empty)

Help Text: (empty)

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

Default Value: Show Formula Editor

At the top right, there is a 'Help for this Page' button with a question mark icon. At the bottom right, there are 'Previous', 'Next', and 'Cancel' buttons.

Cloud icon

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Details

**Fields & Relationships**

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- Scoping Rules

New Custom Field

Step 3. Establish field-level security

Step 3 of 4

Help for this Page

Field Label: Address  
Data Type: Long Text Area  
Field Name: Address  
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"/>
Anypoint Integration	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Previous Next Cancel

Cloud icon

Setup Home Object Manager

SETUP > OBJECT MANAGER  
Volunteer

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
- Restriction Rules
- Scoping Rules

New Custom Field

Step 4. Add to page layouts

Step 4 of 4

Help for this Page

Field Label: Address  
Data Type: Long Text Area  
Field Name: Address  
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  
  Volunteer Layout

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

Previous Save & New Save Cancel

Setup Home Object Manager

SETUP > OBJECT MANAGER  
**Volunteer**

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 Restriction Rules Scoping Rules

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.

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 lookup 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.

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 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, that date and the current time are 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 lead, users 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 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.

Setup Home Object Manager

SETUP > OBJECT MANAGER  
**Volunteer**

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 Restriction Rules Scoping Rules

New Custom Field Step 2 of 4

Help for this Page

Step 2. Enter the details

Field Label: Date of Birth

Field Name: Date\_of\_Birth

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: Show Formula Editor

Use formula syntax: Enclose text and picklist value API names in double quotes. ('The\_Label'), include numbers without quotes. (.25) show percentages as decimals (.0.10), and express date calculations in the standard format: (Today() + 7). To reference a field from a Custom Metadata type record use: \${CustomMetadataType\_\_RecordName\_\_Field\_\_c}

Previous Next Cancel

The screenshot shows the Salesforce Setup interface for creating a new custom field named "Date of Birth" for the "Volunteer" object. The field is defined as a Date type with the internal name "Date\_of\_Birth". The "Field-Level Security for Profile" section lists various user profiles, all of which have the "Visible" checkbox checked and the "Read-Only" checkbox unchecked. The interface includes a sidebar with options like Details, Fields & Relationships, Page Layouts, and Lightning Record Pages.

**Step 3. Establish field-level security**

Field Label: Date of Birth  
Data Type: Date  
Field Name: Date\_of\_Birth  
Description:

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"/>
Anypoint Integration	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Help for this Page

Step 3 of 4

Previous Next Cancel

The screenshot shows the Salesforce Setup interface for creating a new custom field named "Date of Birth" for the "Volunteer" object. The field is defined as a Date type with the internal name "Date\_of\_Birth". The "Add to page layouts" section allows selecting the "Volunteer Layout" for the field. A note indicates that the field will be added as the last field in the first 2-column section of the layout. The interface includes a sidebar with options like Details, Fields & Relationships, Page Layouts, and Lightning Record Pages.

**Step 4. Add to page layouts**

Field Label: Date of Birth  
Data Type: Date  
Field Name: Date\_of\_Birth  
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  
 Volunteer Layout

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

Help for this Page

Step 4 of 4

Previous Save & New Save Cancel

The screenshot shows the Salesforce Setup interface for creating a new custom field. The object is set to 'Volunteer'. The left sidebar is titled 'Fields & Relationships'. The main panel is titled 'Step 1. Choose the field type'.

**Data Type**

- None Selected
- Auto Number
- Formula
- Roll-Up Summary
- Lookup Relationship
  - Master-Detail Relationship
  - External Lookup Relationship
- Checkbox

Help text for Auto Number:

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

Help text for 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.

Help text for External Lookup Relationship:

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

Help text for Checkbox:

- 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 application.

The screenshot shows the Salesforce Setup interface for creating a new custom field. The object is set to 'Volunteer'. The left sidebar is titled 'Fields & Relationships'. The main panel is titled 'New Custom Field'.

**Step 2. Enter the details**

**Field Label:**  [?](#)

**Display Format:**  [Example: A-{0000} What Is This?](#)

**Starting Number:**

Generate Auto Number for existing records

**Field Name:**  [?](#)

**Description:**

**Help Text:**

**External ID:**  Set this field as the unique record identifier from an external system

**Auto add to custom report type:**  Add this field to existing custom report types that contain this entry [?](#)

Help for this Page [?](#)

**Volunteer**

**New Custom Field**

**Step 3. Establish field-level security**

Field Label: execution ID  
 Data Type: Auto Number  
 Field Name: execution\_ID  
 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
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Anypoint Integration	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

## FLows:

Automating the donation submission and assignment to volunteers.

**Flows**

**All Flows**

Flow Definitions

Flow Label	Process Type	Active	Template	Package State	Packag...	Last M...	Last M...
Add or Modify Service Appointment Attendees	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Managed-Installed			
Approvals Workflow: Evaluate Approval Requests	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Approvals Workflow: Process Approval Submission	Screen Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Managed-Installed			
Authentication Provider User Registration	Identity User Registration Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Basic Approval Request	Flow Orchestration for CMS	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Book Appointment from Invitation	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Cancel Item Flow	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Change Case Owner to Incident Owner	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Chats Routed to Agents and Queues	Omni-Channel Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Chats Routed to Agents with the Right Skills	Omni-Channel Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Check Flow API Name	Autolaunched Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Managed-Installed			
Check Service Plan Eligibility	Autolaunched Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Class: Choose Requester & Related Issues	Screen Flow	<input type="checkbox"/>	<input type="checkbox"/>	Managed-Installed			

**New Automation**

**Get Started with Automations**  
Select a category, flow type, use search, or let Einstein build an automation for you.

**Categories**

- Triggered**  
Automations launched by records and events. This type of automation runs without user interaction.  
[View All >](#)
- Scheduled**  
Time-based automations that launch at a specific time or frequency. This type of automation runs without user interaction.  
[View All >](#)
- Screen**  
Interface-driven automations that guide users through business processes. This type of automation collects or displays...  
[View All >](#)
- Autolaunched**  
Automations that automatically launch when invoked by APIs, templates, processes, conditions, or something else...  
[View All >](#)

**Frequently Used**

- Record-Triggered Flow**  
Launches when a record is created, updated, or deleted. This autolaunched flow runs in the background.  
[View All >](#)
- Screen Flow**  
Guides users through a business process that's launched from Lightning pages, Experience Cloud sites, quick actions, an...  
[View All >](#)
- Schedule-Triggered Flow**  
Launches at a specified time and frequency for each record in a batch. This autolaunched flow runs in the...
- Autolaunched Flow (No Trigger)**  
Launches when invoked by Apex, processes, REST API, and more. This autolaunched flow runs in the...

[Get more on the AppExchange](#)

**New Automation**

**Screen Automations**  
Showing 38 of 73 results

Filter By  Triggered  Scheduled  Screen  AutoLaunched

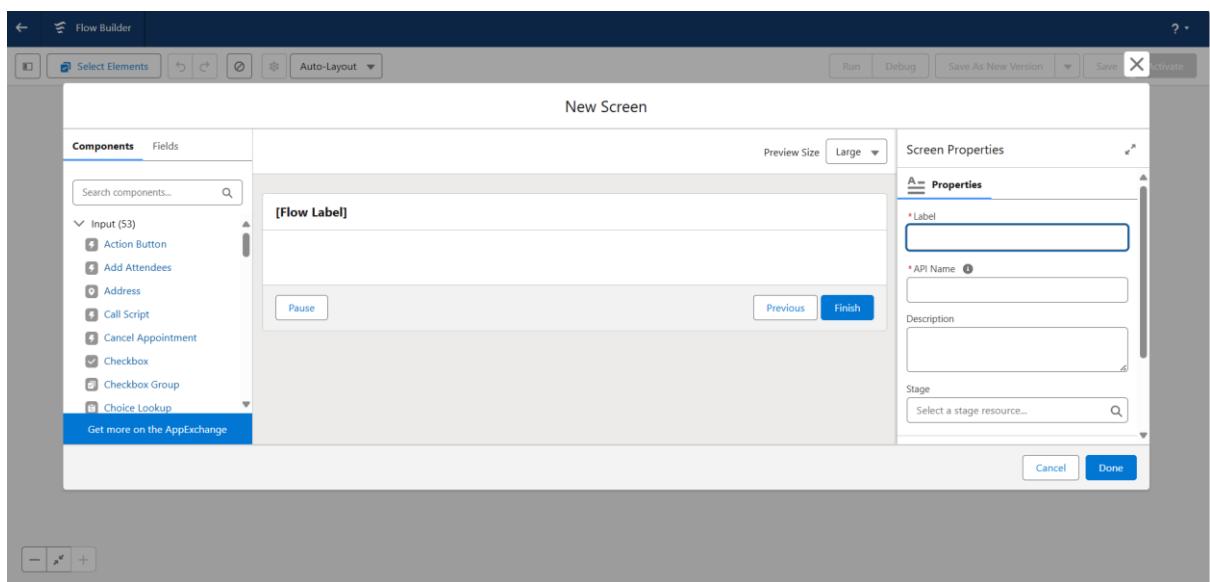
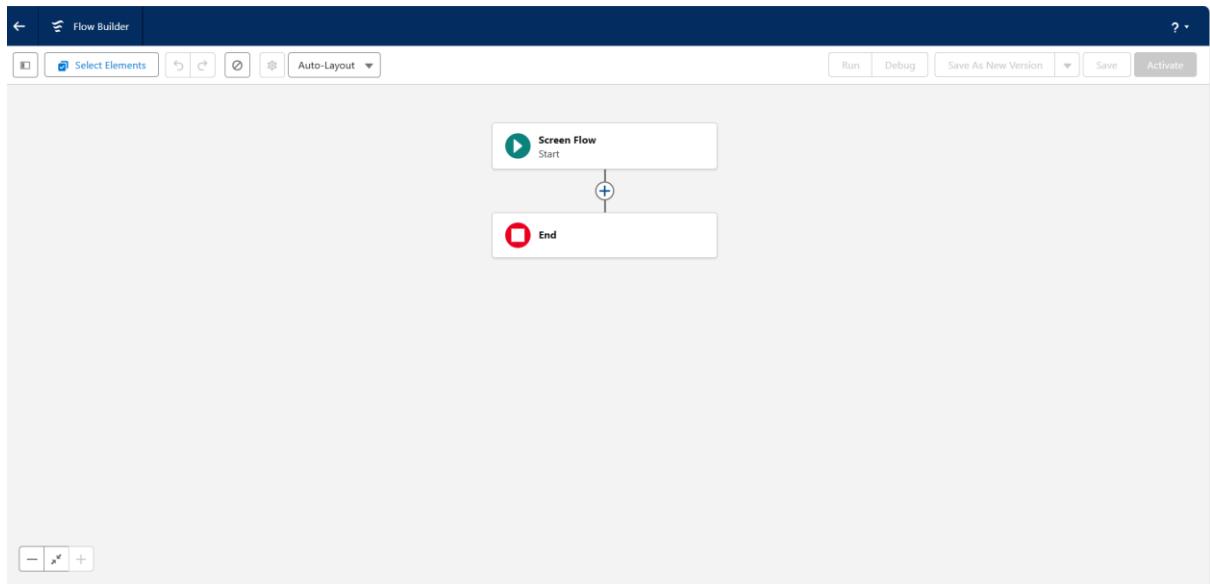
**Types (5)**

- Screen Flow**  
Guides users through a business process that's launched from Lightning pages, Experience Cloud sites, quick actions, and more.
- User Provisioning Flow**  
Create a user account and link it to a third-party service or app.
- Salesforce Scheduler Flow**  
Create a new flow for use in Salesforce Scheduler Flow.

**Templates (33)**

[Back](#)

[Get more on the AppExchange](#)



Flow Builder

Select Elements | Auto-Layout | Run | Debug | Save As New Version | Save | Activate

### New Screen

Components Fields

venue

Email you@example.com

Phone

Venue Location

Latitude

Get more on the AppExchange

Preview Size Large

Number Properties

Label longitude

API Name longitude

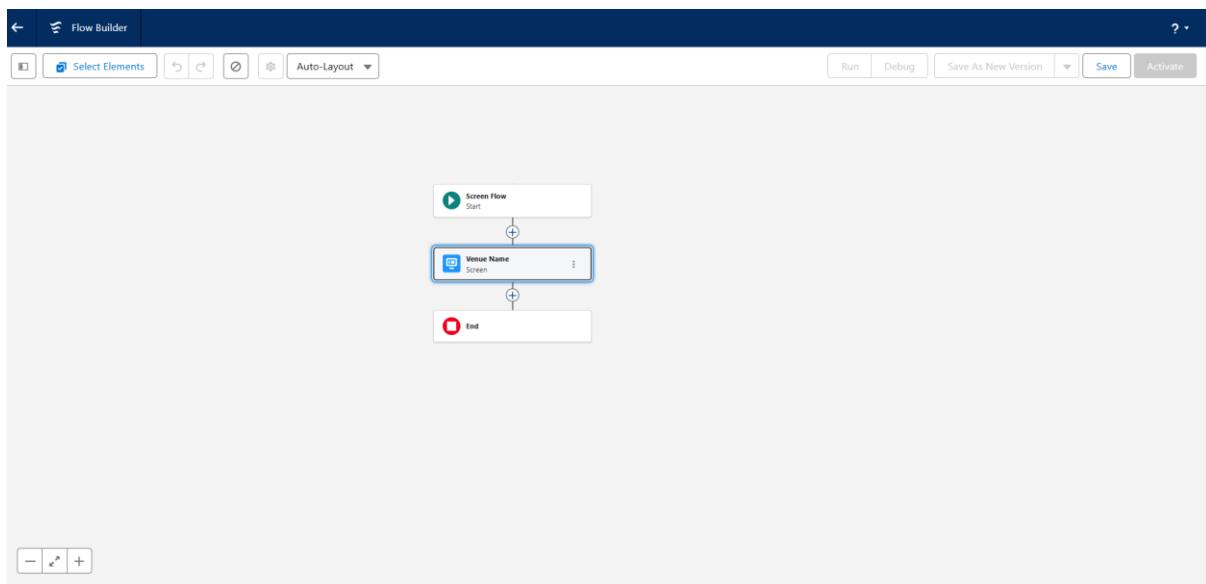
Require

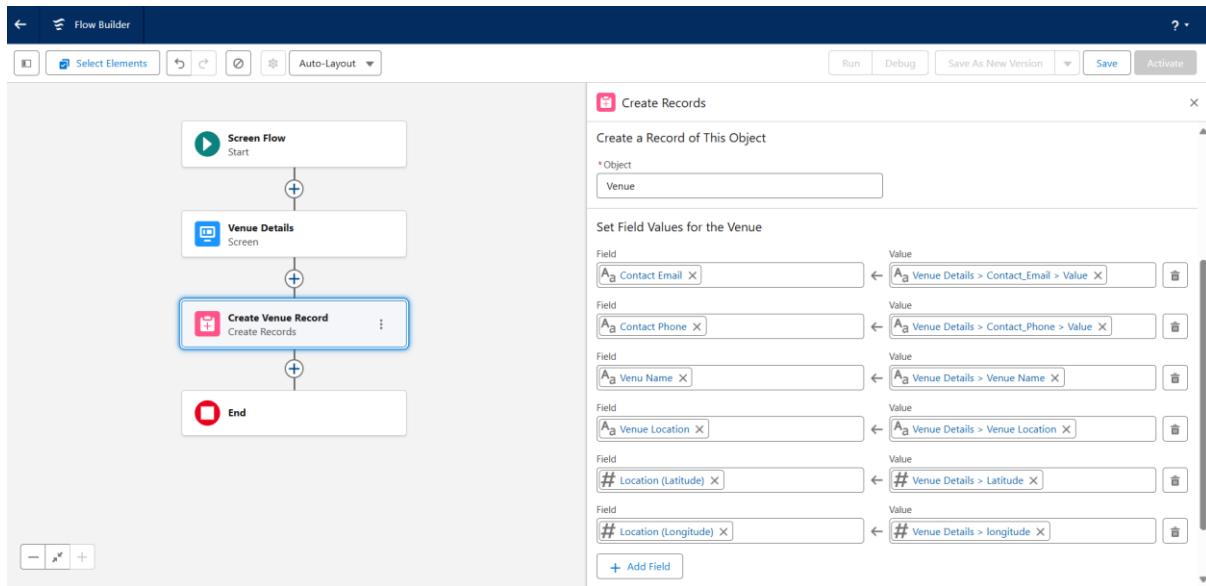
Read Only

Disabled

Default Value

Cancel Done



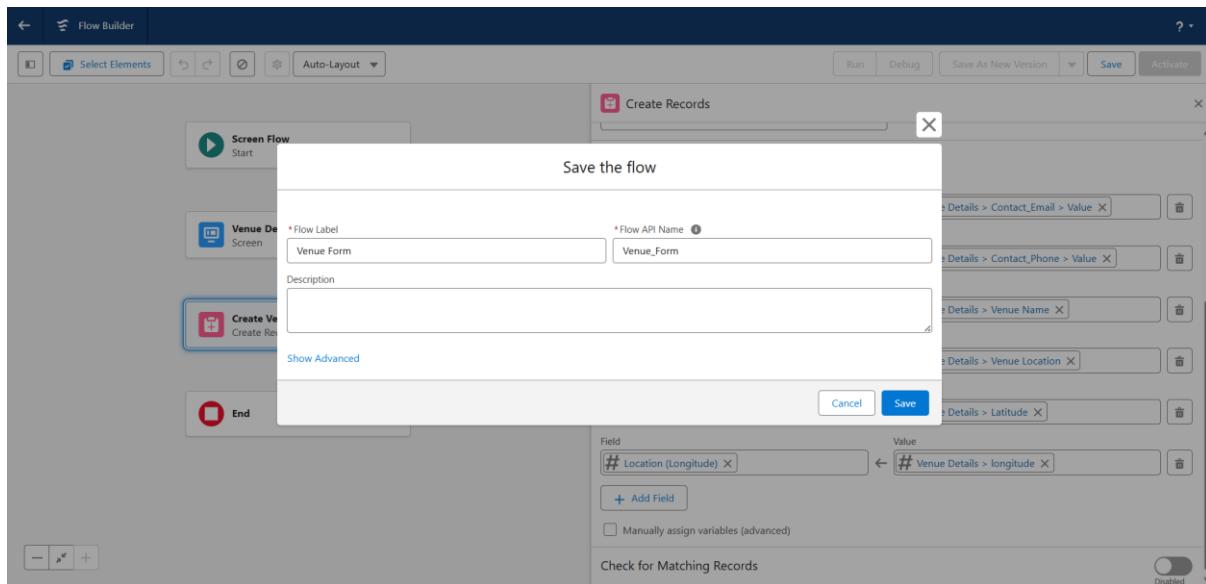


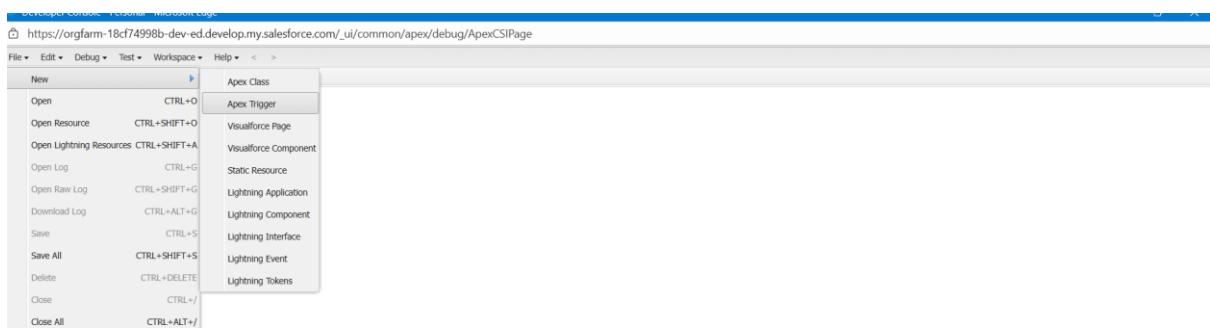
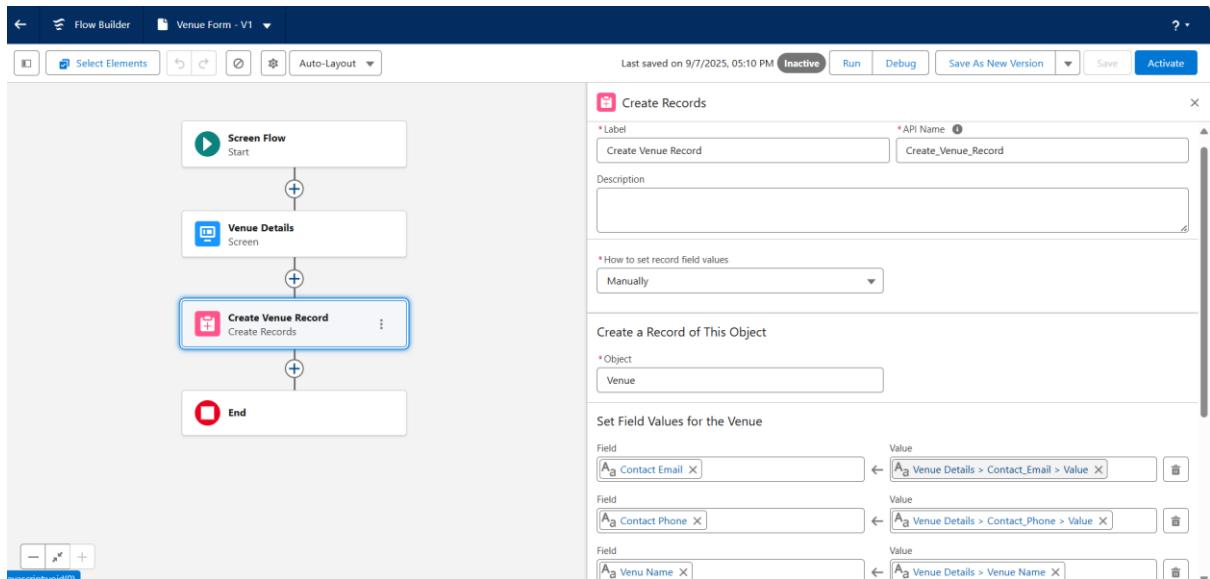
## TRIGGERS:

Apex triggers to automate specific actions like notifications.

### Trigger Code:

```
trigger DropOffTrigger on Drop_Off_point__c (before insert) {
    for(Drop_Off_point__c Drop : Trigger.new){
        Drop.Distance__c = Drop.distance_calculation__c;
    }
}
```





Logs	Tests	Checkpoints	Query Editor	View State	Progress	Problems
User	Application	Operation	Time	Status	Read	Size

https://orgfarm-18cf74998b-dev-ed.develop.my.salesforce.com/\_ui/common/apex/debug/ApexCIPage

## PROFILES:

Managing user permissions based on roles (NGOs Profile).

**Profile Detail**

Name	NGOs Profile	User License	Salesforce Platform	Custom Profile	✓
Description		Created By	Bala M, 9/7/2025, 5:36 AM	Modified By	Bala M, 9/7/2025, 5:36 AM
<b>Page Layouts</b>					
Standard Object Layouts	Global	Account	Lead	Location	Location Group Assignment
Email Application	Not Assigned	Home Page Layout	Lead Layout [View Assignment]	Location Layout [View Assignment]	Location Group Layout [View Assignment]
Home Page Layout	Not Assigned	Appointment Invitation	Location Layout [View Assignment]	Location Group Assignment Layout [View Assignment]	Object Milestone
Account	Not Assigned	Asset	Operating Hours	Object Milestone Layout [View Assignment]	Order
Alternative Payment Method	Not Assigned	Asset Relationship	Order Product	Order Product Layout [View Assignment]	Payment
Appointment Invitation	Not Assigned	Assigned Resource	Payment Layout [View Assignment]		
Asset	Not Assigned				
Asset Relationship	Not Assigned				
Assigned Resource	Not Assigned				

**All Users**

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Chatter Expert	Chatter	chatty_00dgk000005xr9muauxvp30hxzse@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/>	EPIC_OrgFarm	OEPIIC	epic_2n37eas5oe1@orgfarm.com		✓	System Administrator
<input type="checkbox"/>	M_Bala	yas	yashikamuthaiyah842@agentforce.com		✓	System Administrator
<input type="checkbox"/>	User_Integration	integ	integration@00dgk000005xr9muaux		✓	Analytics Cloud Integration User
<input type="checkbox"/>	User_Security	sec	insightssecurity@00dgk000005xr9muaux		✓	Analytics Cloud Security User

## CREATION OF USERS:

Creating test users to simulate real-world usage

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. A search bar at the top left contains 'users'. The main area displays a 'New User' form under the 'User Edit' section. The 'General Information' tab is active. The user details are as follows:

Field	Value
First Name	Iksa Foundation
Last Name	Iksa_Foundation
Alias	iksh
Email	yashikamuthaiah@gmail.co
Username	yashikamuthaiah@gmail.co
Nickname	User175724877084033297
Title	
Company	sales force
Department	
Division	

On the right side of the form, there are several sections of checkboxes for different user types, such as Marketing User, Offline User, Knowledge User, etc. Most of these checkboxes are unchecked. The 'Role' dropdown is set to '<None Specified>'. The 'User License' dropdown is set to 'Salesforce Platform'. The 'Profile' dropdown is set to 'NGOs Profile'. The 'Active' checkbox is checked. Other settings include 'Data.com User Type' set to '-None-', 'Data.com Monthly Addition Limit' set to 'Default Limit (300)', and 'Accessibility Mode (Classic Only)' checked.

This screenshot shows the same 'New User' form in the Salesforce Setup interface. The user details are as follows:

Field	Value
First Name	yashika muthaiah
Last Name	yashika muthaiah
Alias	iksh
Email	Karthicksiva1314052@gma
Username	bala_bcs23@rathinam.in
Nickname	User175724898416427195
Title	
Company	sales force
Department	
Division	

The right-hand configuration section is identical to the first screenshot, with the 'Role' set to '<None Specified>', 'User License' to 'Salesforce Platform', 'Profile' to 'NGOs Profile', 'Active' checked, and other settings like Data.com User Type, Monthly Addition Limit, and Accessibility Mode all matching the first user's configuration.

**New User**

User Edit      Save | Save & New | Cancel

**General Information**

First Name: abishek  
Last Name: abishek  
Alias: aabis  
Email: yashikamuthaiyah@gmail.co  
Username: yashikamuthaiyah@wise-img  
Nickname: User175724916714075648  
Title:   
Company: sales force  
Department:   
Division:   
Role: <None Specified>  
User License: Salesforce Platform  
Profile: NGOs Profile  
Active:   
Marketing User:   
Offline User:   
Knowledge User:   
Flow User:   
Service Cloud User:   
Site.com Contributor User:   
Site.com Publisher User:   
WDC User:   
Data.com User Type: --None--  
Data.com Monthly Addition Limit: Default Limit (300)  
Accessibility Mode (Classic Only):   
High-Contrast Palette on Charts:

## PUBLIC GROUPS:

Grouping users for sharing rules and collaboration.

**Public Groups**

A public group is a set of users. It can contain individual users, other groups, the users in a particular role or territory, or the users in a role or territory plus all of the users below that role or territory in the hierarchy.

View: All | Edit | Create New View

Label	Group Name	Created By	Created Date
No records to display.			

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

The screenshot shows the Salesforce Setup interface. On the left, the navigation sidebar is open, showing categories like Users, Feature Settings, and Company Settings. Under the Users category, 'Public Groups' is selected. The main content area is titled 'Public Groups' and shows a 'New Group' form. The 'Group Information' section contains fields for 'Label' (Iksha), 'Group Name' (Iksha), and 'Grant Access Using Hierarchies' (checked). Below this is a search bar and two lists: 'Available Members' and 'Selected Members'. The 'Available Members' list is currently empty. The 'Selected Members' list also shows an empty state with 'None' and 'Add' and 'Remove' buttons. A status message at the bottom says 'Didn't find what you're looking for? Try using Global Search.'

This screenshot shows the same Salesforce Setup interface after creating the group. The main content area is titled 'Public Groups' and displays a list of existing groups. The table includes columns for Action, Label, Group Name, Created By, and Created Date. Three groups are listed: 'Iksha' (created by Bala\_M on 9/7/2025, 5:56 AM), 'NSS' (created by Bala\_M on 9/7/2025, 5:58 AM), and 'Street\_Cause' (created by Bala\_M on 9/7/2025, 5:58 AM). The navigation sidebar remains the same, with 'Public Groups' still selected under the Users category.

Action	Label	Group Name	Created By	Created Date
Edit   Del	Iksha	Iksha	Bala_M	9/7/2025, 5:56 AM
Edit   Del	NSS	NSS	Bala_M	9/7/2025, 5:58 AM
Edit   Del	Street_Cause	Street_Cause	Bala_M	9/7/2025, 5:58 AM

## REPORT TYPES:

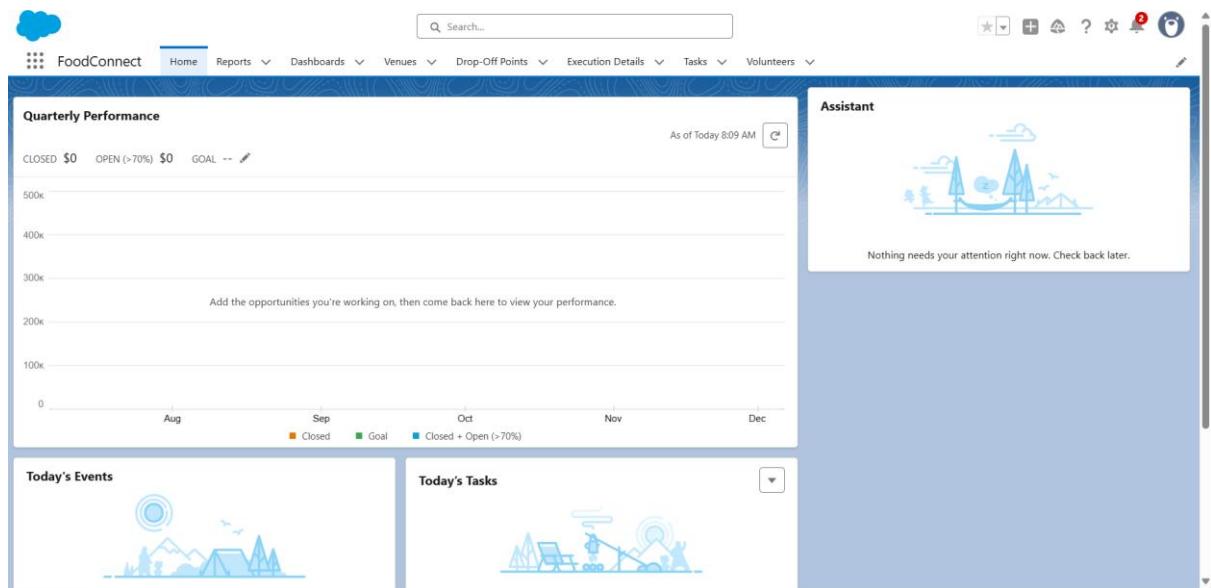
Creating custom report types for data analysis.

The screenshot shows the Salesforce Setup interface with the 'Custom Report Types' page open. The left sidebar navigation includes 'Feature Settings', 'Analytics', 'Reports & Dashboards' (with 'Report Types' selected), and 'Security'. A search bar at the top right contains the text 'Search Setup'. The main content area displays a table titled 'All Custom Report Types' with 12 items. The columns are 'Label', 'Name', 'Description', 'Category', 'Created Date', and 'Actions'. The table lists various report types such as 'Orchestration Run Logs Spring '24', 'Orchestration Runs Spring '24', and 'Program Progress Summer '24'. A 'New Custom Report Type' button is located in the top right corner of the table header.

The screenshot shows the 'New Custom Report Type' wizard in the Salesforce Setup interface. The left sidebar navigation is identical to the previous screenshot. The main content area is divided into sections: 'Define the Custom Report Type', 'Select Primary Object', and 'Details'. In the 'Select Primary Object' section, 'Venues' is selected as the primary object. In the 'Details' section, the 'Display Label' is 'Venue with DropOff with Volunteer' and the 'API Name' is 'Venue\_with\_DropOff\_with\_Volunteer'. The 'Next' button is visible at the bottom right of the 'Details' section.

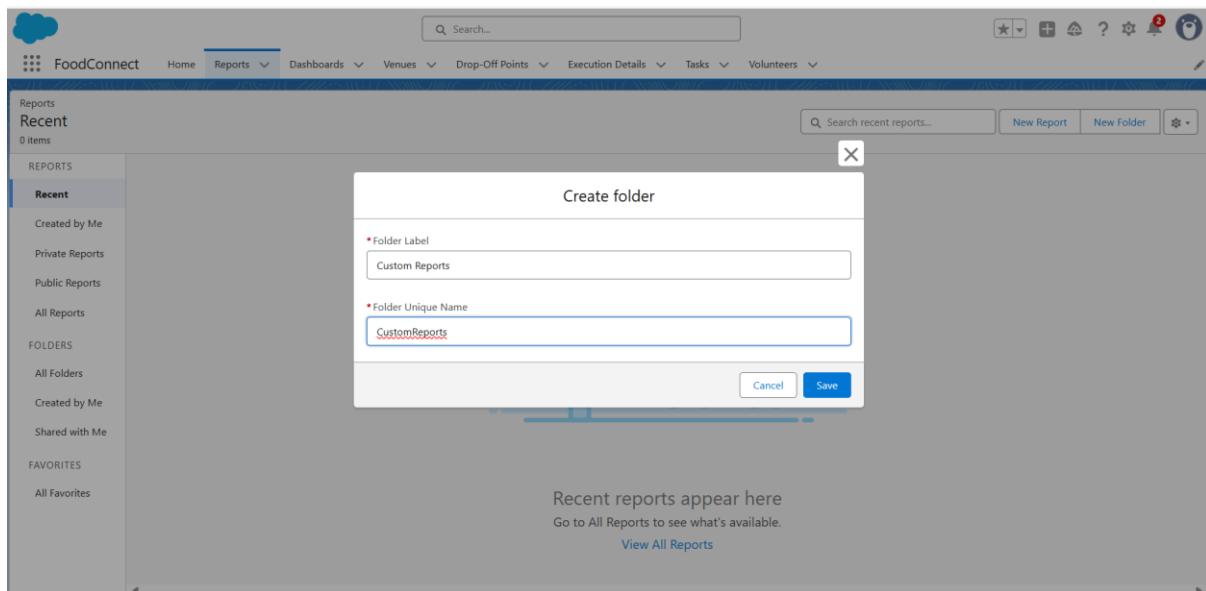
## REPORTS:

Real-time reports on total food collected, distributed, etc.



## DASHBOARDS:

Visual dashboards to monitor KPIs like total meals served.



The screenshot shows the FoodConnect application's report builder for a 'New Drop-Off Points with Venue Report'. The top navigation bar includes Home, Reports, Dashboards, Venues, Drop-Off Points, Execution Details, Tasks, and Volunteers. The main area shows a preview of the report titled 'Drop-Off Points with Venue'. On the left, there's a 'Fields' panel with 'Groups' (containing 'Drop-Off Point: ID') and 'Columns' (containing 'Venue: Venu Name', 'Drop-Off Point: Drop-Off Point Nan', and '# Distance'). The preview pane shows a message: 'To see the latest edits, refresh the preview. Refresh.' Below the preview are buttons for 'Add Chart', 'Save & Run', 'Save', 'Close', and 'Run'. At the bottom, there are checkboxes for 'Row Counts', 'Detail Rows', 'Subtotals', and 'Grand Total', along with a 'Conditional Formatting' button.

**FoodConnect**

REPORT ▾ New Drop-Off Points with Venue Report ▾ Drop-Off Points with Venue

Save Report

Report Name: **venue and Drop Off point**

Report Unique Name: **venue\_and\_Drop\_Off\_point\_Bj0**

Report Description:

Folder: **Custom Reports**

Cancel

Row Counts  Detail Rows  Subtotals  Grand Total

Conditional Formatting

**FoodConnect**

REPORT ▾ New Report ▾ Drop-Off Points with Volunteers with Execution Details

Search all fields...

Groups

- Drop-Off Point Name
- Volunteer Name
- Execution Detail Name

No records returned in preview. Try running the report or editing report filters.

- Show All drop-off points
- Set the Created Date filter to All Time
- Edit other filters in the filter panel.

Update Preview Automatically

Row Counts  Detail Rows  Subtotals  Grand Total

Save Report

\* Report Name  
Volunteer Task

Report Unique Name ⓘ  
Volunteer\_Task\_ID

Report Description

Folder  
Custom Reports

Cancel Save

REPORT ▾

New Report / Drop-Off Points with Volunteers with Execution Details

Search all fields...

Outline Filters

Groups  GROUP ROWS  Add group...

Volunteer ID  GROUP COLUMNS  Add group...

Columns  Add column...

Drop-Off Point Name

No records returned in preview. Try running the report or editing report filters.

- Show All drop-off points
- Set the Created Date filter to All Time
- Edit other filters in the filter panel

Row Counts  Detail Rows  Subtotals  Grand Total

Update Preview Automatically

Add Chart Save & Run Save Close Run

**FoodConnect** Home Reports Dashboards Venues Drop-Off Points Execution Details Tasks Volunteers

REPORT ▾ New Report / Drop-Off Points with Volunteers with Execution Details

Search all fields...

Summary Formulas (0)  Create Formula

Drop-Off Points (13)

- A. Drop-Off Point ID
- A. Owner: Full Name
- A. Drop-Off Point Name
- B. Created Date
- A. Created By: Full Name
- B. Last Modified Date
- A. Last Modified By: Full Name
- B. Last Activity Date
- A. Venue: Venu Name
- A. Sponsored By: Venu Name
- # distance calculation
- C. State
- # Distance

Volunteers (16)

- A. Volunteer ID
- A. Volunteer Name
- B. Created Date
- A. Created By: Full Name

Save Report

\*Report Name  Volunteer Task

Report Unique Name  Volunteer\_Task\_pe2

Report Description

Folder  Custom Reports  Select Folder

Cancel  Save

Row Counts  Detail Rows  Subtotals  Grand Total

**FoodConnect** Home Reports Dashboards Venues Drop-Off Points Execution Details Tasks Volunteers

Reports Recent 3 items

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Volunteer Task				2023-09-15, 8:48 AM	
Created by Me	Volunteer Task				2023-09-15, 8:43 AM	
Private Reports	venue and Drop Off point				2023-09-15, 8:32 AM	
Public Reports						
All Reports						
FOLDERS						
All Folders						
Created by Me						
Shared with Me						
FAVORITES						
All Favorites						

Create folder

\*Folder Label  Custom Dashboards

\*Folder Unique Name  CustomDashboards

Cancel  Save

FoodConnect Home Reports Dashboards Venues Drop-Off Points Execution Details Tasks Volunteers

Reports All Folders > Custom Dashboards 0 items

REPORTS Recent Created by Me Private Reports Public Reports All Reports

FOLDERS All Folders Created by Me Shared with Me

FAVORITES All Favorites

The folder named Custom Dashboards was created.

Nothing here yet  
This folder is empty.



Search...

FoodConnect Home Reports Dashboards Venues Drop-Off Points Execution Details Tasks Volunteers

Dashboards Recent 0 items

DASHBOARDS Recent Created by Me Private Dashboards All Dashboards

FOLDERS All Folders Created by Me Shared with Me

FAVORITES All Favorites

Recent dashboards appear here  
Go to All Dashboards to see what's available.  
[View All Dashboards](#)



Search...

 FoodConnect

Home Reports Dashboards Venues Drop-Off Points Execution Details Tasks Volunteers

Dashboards Recent 0 items

DASHBOARDS

- Recent
- Created by Me
- Private Dashboards
- All Dashboards

FOLDERS

- All Folders
- Created by Me
- Shared with Me

FAVORITES

- All Favorites

Search...

Create folder

\* Folder Label: Custom Dashboards

\* Folder Unique Name: CustomDashboards

Cancel Save

Recent dashboards appear here  
Go to All Dashboards to see what's available.  
[View All Dashboards](#)

[X](#)

 FoodConnect

Home Reports Dashboards Venues Drop-Off Points Execution Details Tasks Volunteers

Custom Dashboard

Volunteer Task

View Report (Volunteer Task)

+ Widget + Filter Save Done

A gauge chart titled "Volunteer Task" showing a value of approximately 75. The scale ranges from 0 to 100, with major ticks at 0, 20, 40, 60, 80, and 100. The needle points towards the green section of the gauge.

Recent dashboards appear here  
Go to All Dashboards to see what's available.  
[View All Dashboards](#)

FoodConnect

Home Reports Dashboards Venues Drop-Off Points Execution Details Tasks Volunteers

Custom Dashboard

Volunteer Task

Select Report

**Reports**

**Recent**

- Created by Me
- Private Reports
- Public Reports
- All Reports

**Folders**

- Created by Me
- Shared with Me
- All Folders

Select Report

Search Reports and Folders...

Volunteer Task  
Bala M - Sep 7, 2025, 8:48 AM - Custom Reports

venue and Drop Off point  
Bala M - Sep 7, 2025, 8:43 AM - Custom Reports

Cancel Select

FoodConnect

Home Reports Dashboards Venues Drop-Off Points Execution Details Tasks Volunteers

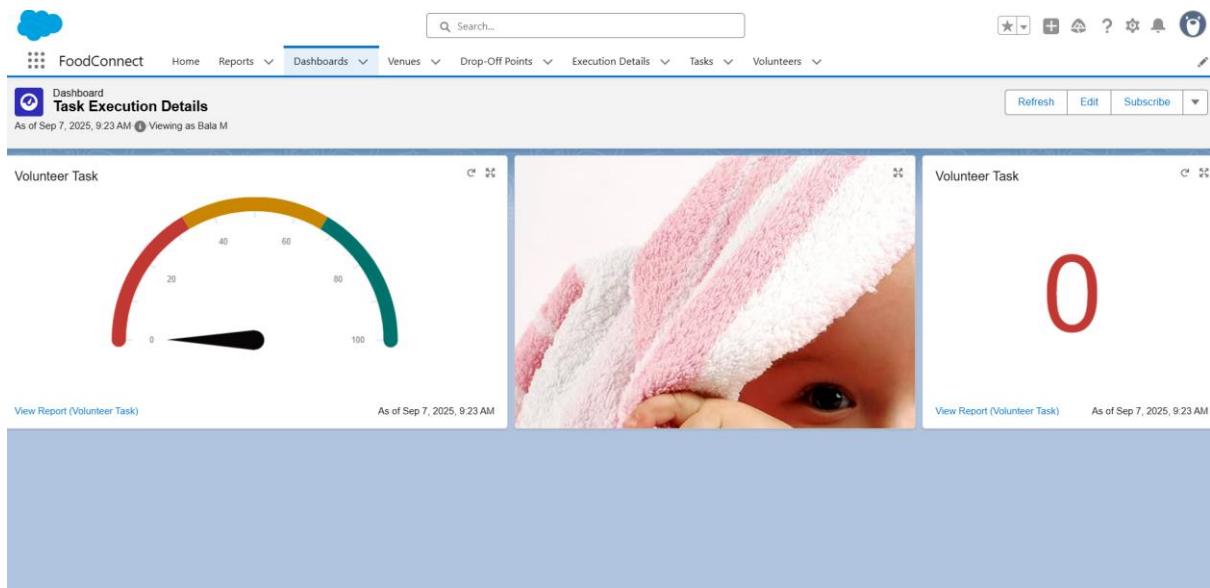
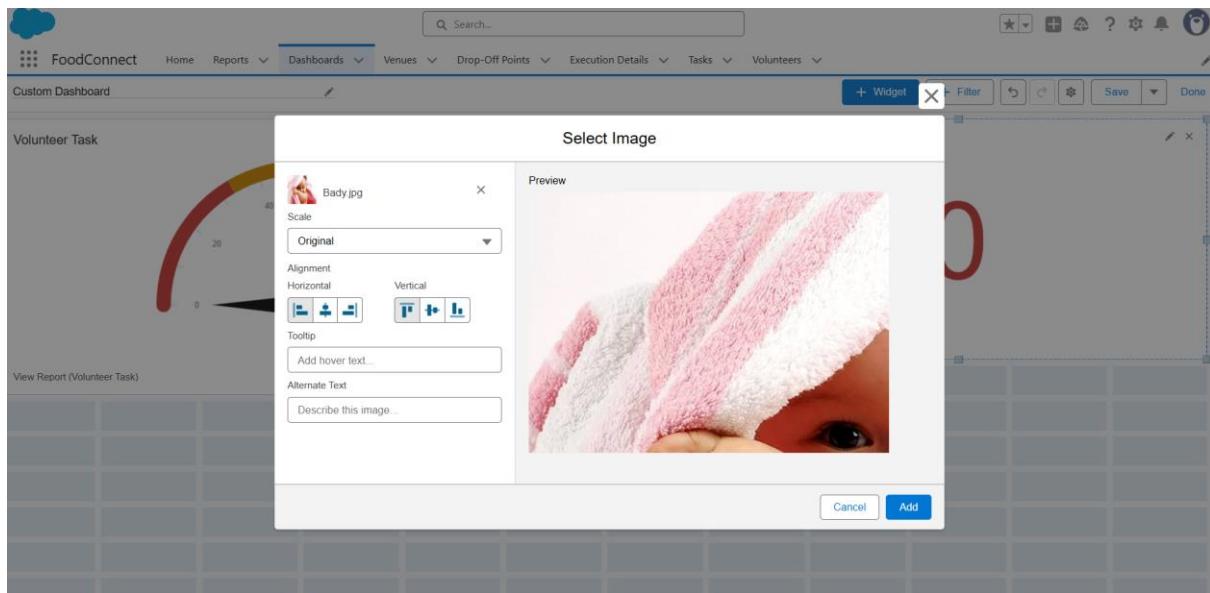
Custom Dashboard

Volunteer Task

View Report (Volunteer Task)

0

View Report (Volunteer Task)



# SHARING RULES:

Ensuring data access based on user groups.

The screenshot shows the 'Sharing Settings' page under the 'SETUP' tab in the Salesforce interface. The left sidebar includes 'Security' and 'Sharing Settings'. The main content area is titled 'Sharing Settings' and displays the 'Organization-Wide Defaults' table. The table has columns for 'Object', 'Default Internal Access', 'Default External Access', and 'Grant Access Using Hierarchies'. Rows include Lead, Account and Contract, Contact, Order, Asset, Opportunity, Case, Campaign, Campaign Member, User, and Activity. The 'Grant Access Using Hierarchies' column contains checkmarks for most objects except Lead, Account and Contract, Contact, Order, Asset, Opportunity, Case, and Activity.

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	✓
Account and Contract	Public Read/Write	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Order	Controlled by Parent	Controlled by Parent	✓
Asset	Controlled by Parent	Controlled by Parent	✓
Opportunity	Public Read/Write	Private	✓
Case	Public Read/Write/Transfer	Private	✓
Campaign	Public Full Access	Private	✓
Campaign Member	Controlled by Campaign	Controlled by Campaign	✓
User	Public Read Only	Private	✓
Activity	Private	Private	✓

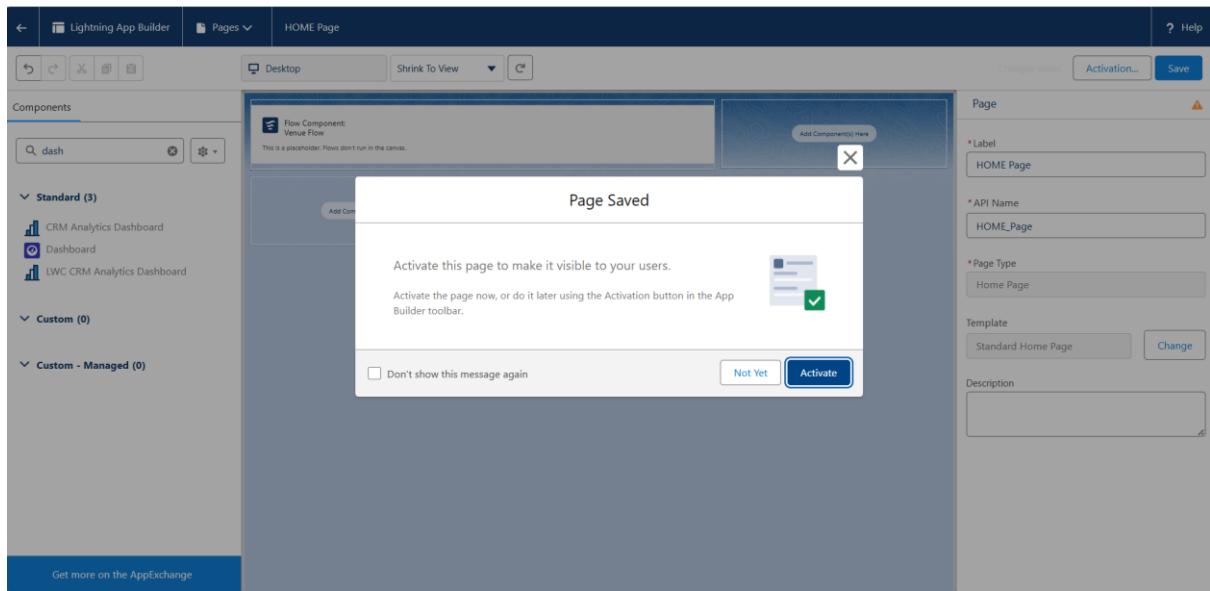
The screenshot shows the 'Drop-Off Point Sharing Rule' creation page under the 'SETUP' tab in the Salesforce interface. The left sidebar includes 'Security' and 'Sharing Settings'. The main content area is titled 'Sharing Settings' and shows the 'Drop-Off Point Sharing Rule' setup steps. Step 1: Rule Name includes fields for Label (Rule 1), Rule Name (Rule\_1), and Description. Step 2: Select your rule type shows 'Based on criteria' selected. Step 3: Select which records to be shared displays a criteria builder with a single row: 'Distance' > 'less than' '15'. The 'Criteria' column has dropdowns for Field, Operator, and Value. The 'Operator' dropdown shows 'less than' and 'None'. The 'Value' dropdown shows '15' and 'None'.

The screenshot shows the Salesforce Sharing Settings page under the Setup menu. The left sidebar includes links for Security, Guest User Sharing Rule Access Report, and Sharing Settings. A search bar at the top right contains the text "Search Setup". The main content area is titled "Sharing Settings" and displays several sections: "Work Type Group Sharing Rules" (No sharing rules specified), "Drop-Off Point Sharing Rules" (No sharing rules specified, with a note about a pending operation), "Sharing Settings Sharing Rules" (No sharing rules specified), "Task Sharing Rules" (No sharing rules specified), and "Venue Sharing Rules" (No sharing rules specified). Each section has "New" and "Recalculate" buttons.

## HOME PAGE:

Custom Lightning Home Page for users with shortcuts.

The screenshot shows the Lightning App Builder page under the Setup menu. The left sidebar includes links for Feature Settings, Service (Field Service, Field Service Mobile), and User Interface (Lightning App Builder). A search bar at the top right contains the text "Search Setup". The main content area is titled "Lightning App Builder" and displays information about the builder's purpose and a table for "Lightning Pages". The table has columns for Label, Name, Namespace Prefix, Description, Type, Created By, and Last Modified By. A note states there are no pages currently created. The table includes a "New" button and a "View: All" dropdown.



## CONCLUSION:

By leveraging the Salesforce platform, the project successfully established a streamlined and transparent system for managing surplus food donations. Through efficient coordination with volunteers and timely delivery to beneficiaries, the project effectively addressed food insecurity while maximizing the utilization of available resources.

## OUTPUT:

The screenshot shows a web-based application interface for 'FoodConnect'. At the top, there is a navigation bar with links: Home, Tasks, Drop-Off Points, Execution Details, Venues, Volunteers, Reports, Dashboards, and Volunteer Tasks. Below the navigation bar, the main content area is titled 'Venue Form'. It contains several input fields: 'Venue Name' (with a placeholder 'Venue Name'), 'Email' (with a placeholder 'you@example.com'), 'Phone' (with a placeholder '(123) 456-7890'), 'Venue Location' (with a placeholder 'Venue Location'), 'Latitude' (with a placeholder 'Latitude'), and 'longitude' (with a placeholder 'longitude'). At the bottom right of the form, there is a blue 'Next' button.