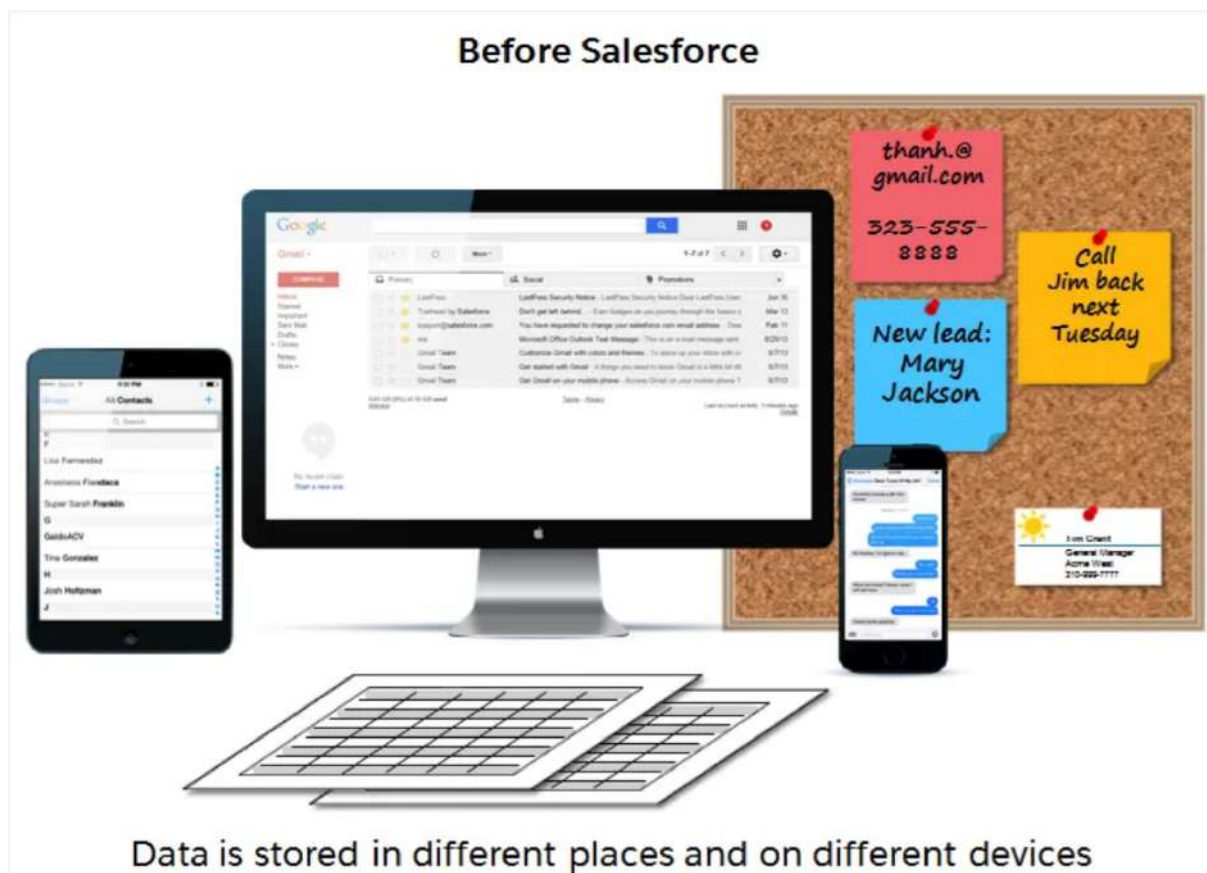


INTRODUCTION TO SALESFORCE

What Is Salesforce?

- Salesforce is an American cloud-based software company headquartered in San Francisco, California. Salesforce was founded in 1999 by Marc Benioff. Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.
- Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.

So what does that really mean? Well, before Salesforce, your contacts, emails, follow-up tasks, and prospective deals might have been organized something like this:



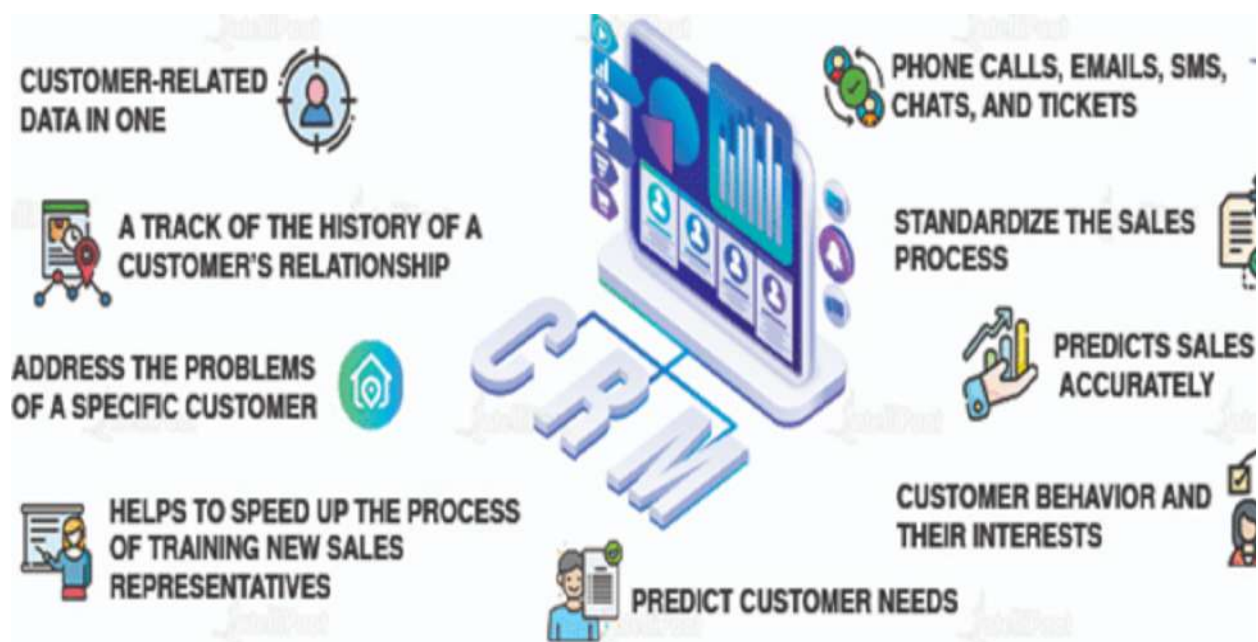
- It is a **CRM Solution** that brings companies and customers together.
- Salesforce is the # first company that took CRM to the cloud, enabling companies to access all of their customer information online, from any device, anywhere in the world, 24/7.
- Salesforce architecture is so popular because of its **multitenancy (multi-tenant Architecture)**.

What Is CRM? ----- (Customer Relationship Management)

CRM stands for Customer Relationship Management. This technology allows you to manage relationships with your customers and prospects and track data related to all of your interactions. It also helps teams collaborate, both internally and externally, gather insights from social media, track important metrics, and communicate via email, phone, social, and other channels.

- CRM is a strategy for managing an organization's relationships and interactions with customers and potential customers
- To understand the customer's needs.
- To fill 360 degree gap between customer and organization
- It's a system that keeps your customer information in one place, so your team can manage your contact with your customers with this full history in mind.

What does Salesforce CRM Do?



CRM helps companies in various ways; some of them are mentioned below:

- CRM helps to keep all customer-related data in one, easily accessible place. This enables everyone in the company to access the information whenever needed.
- It helps in keeping track of all the interactions that the company has with customers via phone calls, emails, SMS, chats, and tickets.
- It helps to keep a track of the history of a customer's relationship with the company, its length, purchasing history, etc.
- CRM helps to standardize the sales process, helping your sales team close deals quicker. CRM also provides the sales team with a proper guide to close deals.
- It helps to clarify why a deal must be stalling and/or how to address the problems of a specific customer.
- CRM predicts sales pretty accurately, enabling you to make accurate forecasts.
- It helps to speed up the process of training new sales representatives.
- CRM gives detailed data about customer behavior and their interests. This keeps you focused on the customers.
- CRM helps you predict customer needs so that you are prepared before they come to you.

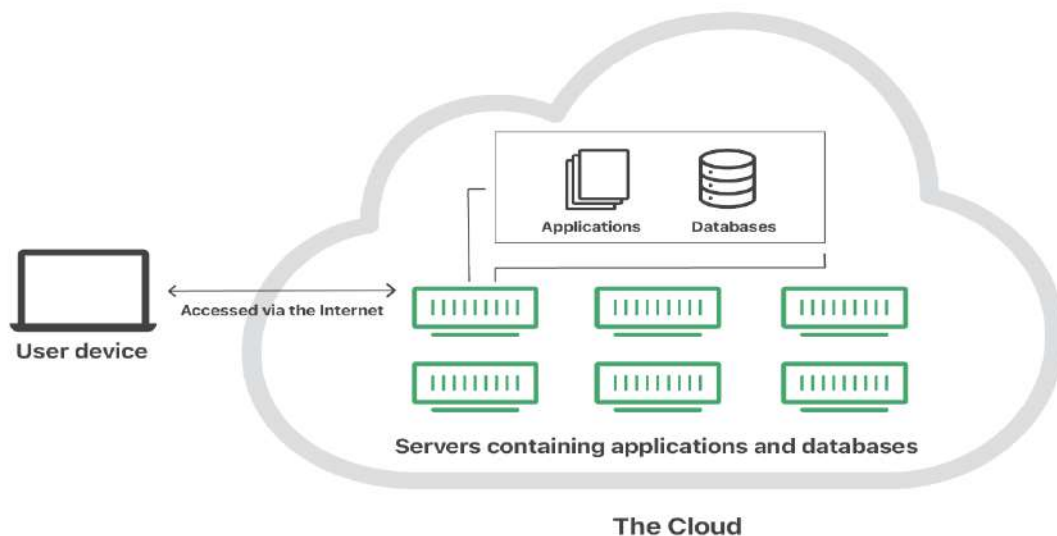
Why Do Companies Use Salesforce



- **Adaptable:** Since Salesforce is a cloud-based CRM, there is no requirement of downloading or installing any software. People can simply log in to their Salesforce accounts and enjoy the services according to their subscription plans.
- **Cost reduction:** One of the major reasons why companies are shifting to Salesforce CRM is that with traditional CRM, they have to invest in infrastructure, developers or coders, and hardware. With Salesforce CRM, they just need to have a Salesforce account with a proper subscription in order to work with the world's 1 CRM company.
- **Customizable products:** Salesforce CRM provides an AppExchange system that grants access to numerous applications. It provides users the ability to customize their applications according to their requirements.

What is Cloud ?

"The cloud" refers to servers that are accessed over the Internet, and the software and databases that run on those servers. Cloud servers are located in data centers all over the world. By using cloud computing, users and companies do not have to manage physical servers themselves or run software applications on their own machines



- The cloud enables users to access the same files and applications from almost any device, because the computing and storage takes place on servers in a data center, instead of locally on the user device.

What is cloud computing?

Cloud computing means that the applications are delivered over the Internet and run in any Web browser so that you can quickly and easily access them from anywhere with any delay

OR

Cloud computing is the delivery of different services through the internet. It means using remote servers to store and access data instead of relying on local hard drives and private Data Centers.

Cloud computing is a term used to describe the delivery of on-demand computing resources—hardware, storage, databases, networking, and software—to businesses and individuals via a network (usually the internet).

Cloud computing is possible because of a technology called virtualization. Virtualization allows for the creation of a simulated, digital-only "virtual" computer that behaves as if it were a physical computer with its own hardware. The technical term for such a computer is virtual machine

Some advantages of cloud computing :-

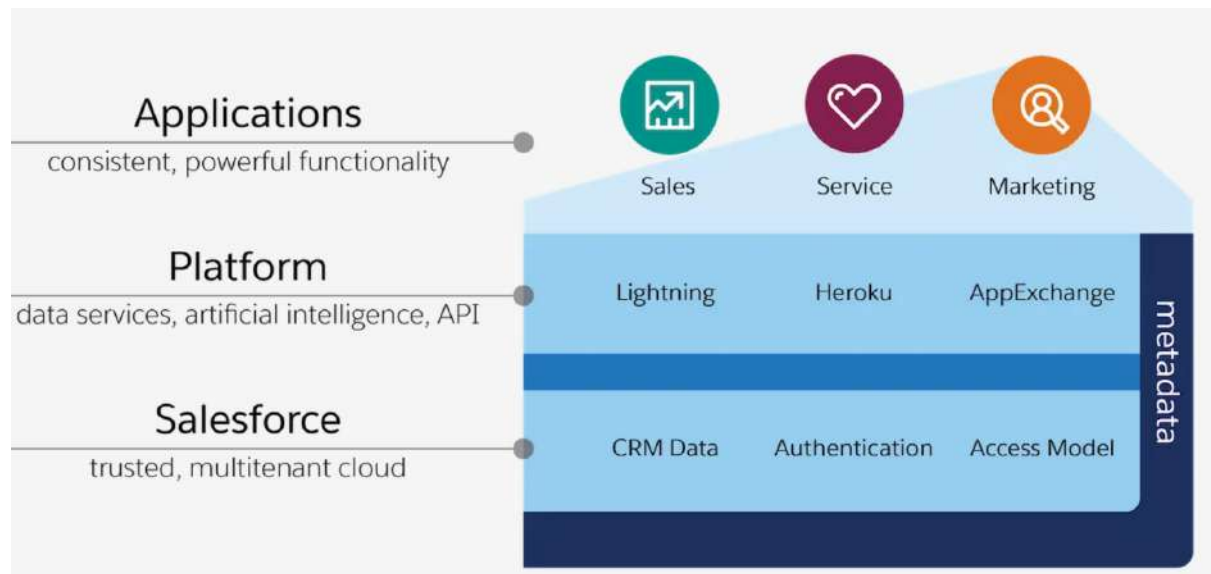
- Backup and restore data
- Mobility
- Scalability
- Pay As You Use
- Data Security
- No Hardware, No Software.
- Cloud computing applications are less expensive than desktop software
- It's effectively infinite in size

What Is the Salesforce Architecture?

Salesforce is one of the leading CRM platforms to provide various customized services to its customers, partners, and employees. It also provides the platform to build custom apps, pages, components, etc., and it performs all these tasks so efficiently, mainly because of its architecture that it follows

Salesforce Architecture is the multilayer architecture; it contains a series of layers situated on the top of each other.

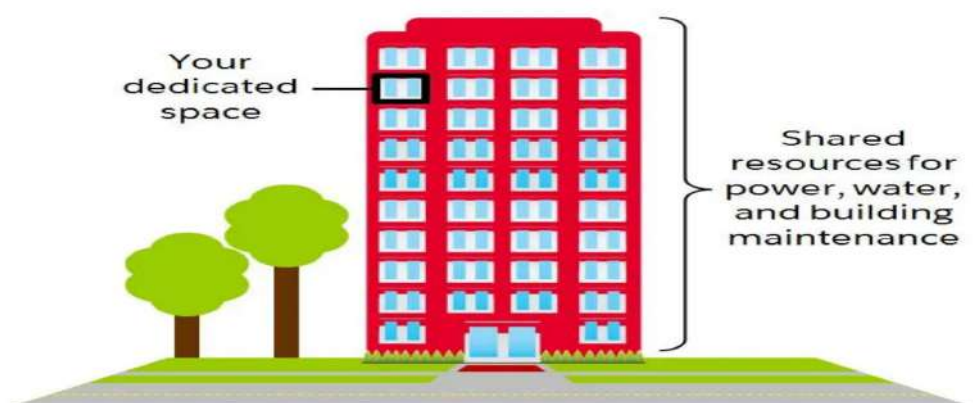
The below diagram shows the architectural view of the salesforce:



Terms used in above diagram:

Metadata - The metadata means data about the data .Metadata is data that describes other data. For example, in a Salesforce org, there is a standard object called Account. When you add a record with a customer's contact information to an Account, you are adding metadata and data. Field names, such as first name and last name are metadata.

Multitenant - Salesforce architecture is so popular because of its **multitenancy**. The multitenant architecture means **one common application for multiple groups or clients** It means the data of one client is secure and isolated from other groups or clients



Also - Because of multitenancy, any developer can develop an application, upload it on the cloud, and easily share it with multiple clients or groups.

What are cloud services?

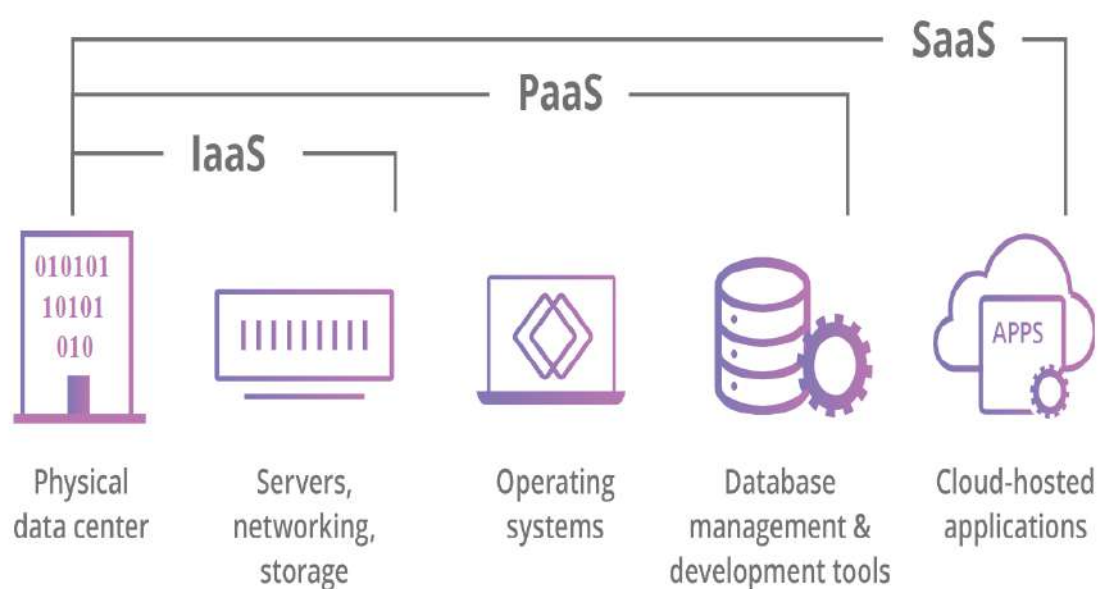
The resources available in the cloud are known as "services," since they are actively managed by a cloud provider. Cloud services include infrastructure, applications, development tools, and data storage, among other products. These services are sorted into several different categories, or *service models*.

What are the benefits of cloud services?

Using cloud computing services, subscribers access online resources through workstations, laptops, tablets, and smartphones that are configured to protect the data and assets hosted on the cloud. With a pay-as-you-go model, cloud services offer a low-cost way to accommodate spikes in demand more efficiently than in-house computing services.

What are the main service models of cloud computing?

Let us Understand First With Diagram:



Software-as-a-Service (SaaS): Instead of users installing an application on their device, SaaS applications are hosted on cloud servers, and users access them over the Internet. SaaS is like renting a house: the landlord maintains the house, but the tenant mostly gets to use it as if they owned it. **Examples** of SaaS applications include Salesforce.

Platform-as-a-Service (PaaS): In this model, companies don't pay for hosted applications; instead they pay for the things they need to build their own applications. PaaS Allows developers to develop their application over a platform including development tools, infrastructure, and operating systems, over the Internet. PaaS can be compared to renting all the tools and equipment necessary for building a house, instead of renting the house itself. PaaS **Examples** include Heroku and Microsoft Azure.

Infrastructure-as-a-Service (IaaS): In this model, a company rents the servers and storage they need from a cloud provider. They then use that cloud infrastructure to build their applications. IaaS is like a company leasing a plot of land on which they can build whatever they want — but they need to provide their own building equipment and materials. **Example** Amazon Web Services (AWS)

What are the different types of cloud deployments?

Private cloud: A private cloud is a server, data center, or distributed network wholly dedicated to one organization. It can be accessed only within the limited premises.

Public cloud: A public cloud is a service run by an external vendor that may include servers in one or multiple data centers. Unlike a private cloud, public clouds are shared by multiple organizations. It can be available to people across the world. The user has no control over the resources.

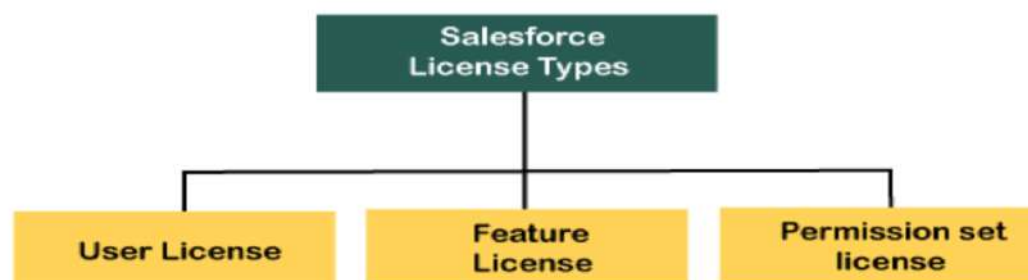
Hybrid cloud: Hybrid Cloud deployments combine public and private clouds. An organization may use their private cloud for some services and their public cloud for others, or they may use the public cloud as backup for their private cloud.

Multi-cloud: It is a type of cloud deployment that involves using multiple public clouds. In other words, an organization with a multi-cloud deployment rents virtual servers and services from several external vendors. Multi-cloud deployments can also be hybrid cloud, and vice versa.

What Are Licenses : This is the users' access to Salesforce products and features that your company has – licenses are assigned specific to users. This provides them with the baseline level of access, which is then adjusted using profiles, permission sets, the role hierarchy, etc. Within your organization, everyone with access to the specific product/feature will be using the same edition

With each edition, different licenses are associated, which provide access to specific features and functionalities of Salesforce platform to the users. It means the user license provided by the salesforce specifies the functionality that a particular user can access. The licenses are available for an org and can be checked on the company information page.

Types of License : Mainly provides the below three types of Licenses:



1. User License:

The user license specifies which feature or functionality a user can access on salesforce. Each user must have one license. The users are assigned for the data access through their user-profile and optionally using one or more permission sets.

2. Feature License

The feature license authorizes the users to access additional features available in the salesforce that are not included in their user license, e.g., Marketing or WDC. A user can have any number of feature licenses.

3. Permission Set License

Like the feature license, the permission set license authorizes the users to access those features that are not included in their user-license. It is a convenient way to assign the permissions to use various tools and functions available on the platform.

Below are some actions that can be performed using the permission set license:

- It allows you to check for the number of permission set licenses in salesforce.com.
- These licenses can be assigned to a user.
- It also allows the company to remove the assigned license from the User.

Edition : Salesforce provides bundles of features and services that are specific for the different business needs. These bundles are known as Editions in Salesforce.

- Each edition provides the software with the same look & feel, but all editions differ by the *price, functionality, and features*.
- The edition is the type of salesforce instance, which determines what functionalities are available.

- Each salesforce edition offers different licenses to the organization that allow them to access different platform's functions.

There are five types of Salesforce Cloud Editions. These Editions are given below:

Essentials Edition :Essential Edition is the basic edition designed for small businesses who want to run their business on the CRM system quickly. It provides the proper setup assistant to get started with the system to the users. It helps the user with the assistance of using the UI and various administration tools to customize the business applications. ***The pricing for the essential edition is \$25 user/month.***

The essential edition provides the default features to fulfill the needs of direct sales. It includes the following features:

- Account, Contact, Lead Management, and Opportunity Management
- Mobile Access of Salesforce CRM
- Sales Process Automation with the help of Process Builder.
- Service Console Apps
- Case Management
- Lead Assignment and routing
- Duplicate blocking
- Customizable Sales process.

Professional Edition : The professional edition is the advanced edition that is mainly designed for businesses that require more CRM functionalities, security, and customization. It provides easy to use customization tools. It also includes the integrations and administration tools to allow small or midsize application

deployment. It means this is the first edition that allows the companies to perform any development work on it. It allows us to create the *two user profiles per Org, two user roles per org, and permission sets*. But these are limited options for the mid-sized organization.

- The professional edition is well suited for mid-sized organizations with only one sales department with Upto 60 team members.
- **The pricing for the professional edition is \$75 per user/month.**

It contains the essential features, including with the following features:

- Lead Registration and Rule-based lead scoring
- Sales orders
- Products and price books
- Collaborative forecasting
- Case milestone tracker
- Store and manage any number of contacts
- Track sales opportunities
- Provides the Person accounts
- Sales console App
- Forecasting Mobile App
- Unlimited Custom Applications
- Developer Sandbox
- Lightning Sync

Enterprise Edition : The enterprise edition is designed to fulfill the requirement of large and complex businesses. It provides access to all platform's functionality, which includes the advanced tools for the customizations and administrations.

This edition enables the organization to access the Salesforce APIs so that the developers can integrate the applications with the back-office systems.

The pricing to access all the functionalities of EE is 150 USD per user/month. It is one of the most popular salesforce editions among the companies that is most beneficial for the customers. Mostly the developers and administrators want to work with the enterprise edition, as it provides all the required functionality for the development and end-users.

It provides all the features of Profession edition, including the below features:

- Access to Apex and Visualforce
- Workflows and approval automation
- Product and Price books
- Sales Territory Management, accounts, and sales teams
- Offline access to the CRM
- Custom Opportunity Fields in Forecasting
- Opportunity Splits
- Web Service API with no additional Charge
- Unlimited Record Type
- Unlimited Roles and Permission
- Advanced Reporting Features.

Unlimited Edition : The unlimited edition maximizes business success and extends it across the entire enterprise through the Lightning Platform. It is the flagship solution for the salesforce.com, and also includes all the features of Enterprise edition with full premium support. It provides access to unlimited online training, over 1000 admin services. It allows us to develop unlimited custom Applications and create custom tabs and objects.

The Unlimited Edition is available with a price of 300 USD/user/month.

The unlimited edition is the best option for the enterprise-level organization with multiple sales departments with more than 250 members.

It includes all the Enterprise Edition Features including below features:

- 24*7 Premium Support and configuration Services
- 2000 Database Object
- Completely Customizable mobile capabilities
- Access to unlimited mobile development sandboxes
- Access to a one-to-one coaching session with a salesforce Expert.

Developers Edition : The developer edition allows the businesses to access the Lightning Platform and APIs. It helps the developers to extend Salesforce, integrate with other applications, and develop new tools and applications.

It is the free edition mainly provided for the development and deployment on the Force.com platform. It provides excellent tools for the testing/training on salesforce.com. It is a type of basic Enterprise Edition with minimal storage.

How to upgrade the Salesforce Edition?

The Salesforce Edition can be upgraded if it does not fulfill the business requirement, or if someone wants to extend its business capabilities.

To upgrade the edition, one needs to contact the salesforce account executive or Salesforce consulting company. We need to pay the difference in the amount between the current edition and the edition we are upgrading.

How to Check the Current Edition?

The Salesforce edition decides the features and functionality available in the org. We can check the current edition by checking the Organization Edition on the Company Information Page.

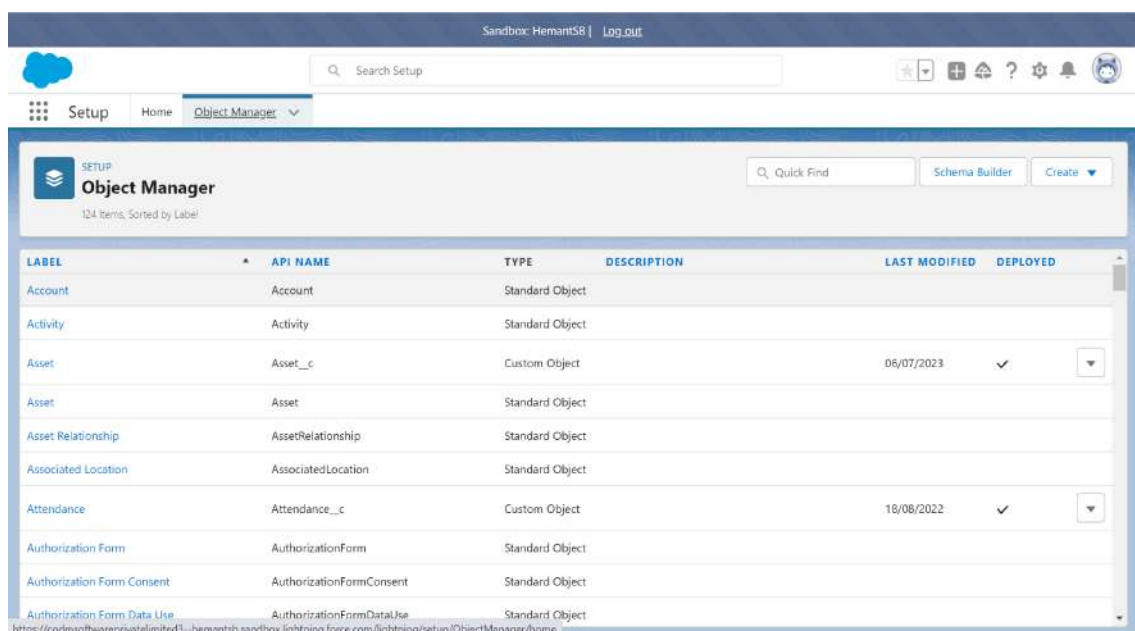
Follow the below two steps:

- From the **Setup** option, enter the *Company information* in the *quick find box*, and choose the **Company Information**.
- The **Organization Edition** will appear in the lower right of the screen.

What are Objects?

Objects are basically tables in which information is stored inside salesforce. Objects Are Basically Of Two Types :

- **Standard Object** : Standard objects are those objects which are already there in salesforce. They are inbuilt objects which are provided by salesforce. Common business objects like **Account, Contact, Lead, and Opportunity** are all standard objects. Custom objects are objects that you create to store information that's specific to your company or industry.



The screenshot shows the Salesforce Object Manager interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager' (selected). Below the navigation bar, there's a search bar and a 'Quick Find' button. The main content area displays a table of objects. The table has columns for 'LABEL', 'API NAME', 'TYPE', 'DESCRIPTION', 'LAST MODIFIED', and 'DEPLOYED'. The objects listed include 'Account', 'Activity', 'Asset', 'Asset Relationship', 'Associated Location', 'Attendance', 'Authorization Form', 'Authorization Form Consent', and 'Authorization Form Data Use'. The 'Asset' and 'Attendance' objects are marked as 'Custom Object' and have deployment status indicators.

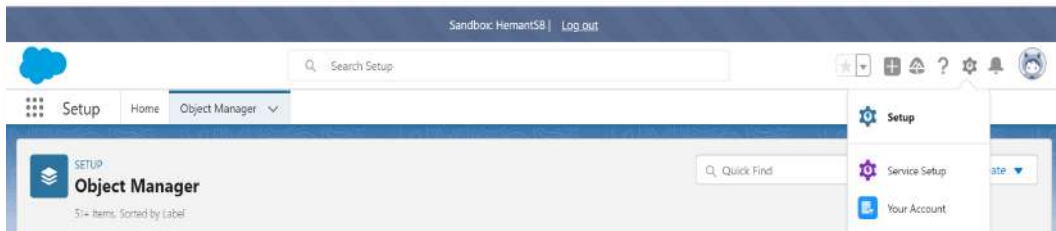
LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Account	Account	Standard Object			
Activity	Activity	Standard Object			
Asset	Asset_c	Custom Object		06/07/2023	✓
Asset	Asset	Standard Object			
Asset Relationship	AssetRelationship	Standard Object			
Associated Location	AssociatedLocation	Standard Object			
Attendance	Attendance_c	Custom Object		18/08/2022	✓
Authorization Form	AuthorizationForm	Standard Object			
Authorization Form Consent	AuthorizationFormConsent	Standard Object			
Authorization Form Data Use	AuthorizationFormDataUse	Standard Object			

- **Custom Object** : Custom Object Are Those objects Which we create according to our need of an organization

How to create a custom object in Salesforce

Creating a custom object is actually quite simple. You'll have to make sure you have the appropriate permissions within your organization to do it, but once you have that sorted, just follow these steps:

1. In your Salesforce org/sandbox , click the cog icon, and select **Setup**.



2. Click the **Object Manager** tab.
3. Click **Create** > **Custom Object** in the top-right corner.



4. In the *Label* section, enter whatever you want to call your custom object. The **Object Name** and **Record Name** fields will auto-fill with the same name.
5. For **Plural Label**, enter the plural form of your custom object name

This screenshot shows the 'New Custom Object' page in Salesforce Setup, specifically the 'Custom Object Definition Edit' section. The page includes a search bar at the top and a navigation menu with 'Setup', 'Home', and 'Object Manager'. The main content area is titled 'New Custom Object' and contains the following fields and options:

- Custom Object Information:**
 - Label:** Text input field with 'Test1' entered. Example: Account.
 - Plural Label:** Text input field with 'Tests_1' entered. Example: Accounts.
 - Starts with vowel sound:** A checkbox that is currently unchecked.
 - Object Name:** Text input field with 'Test_1' entered. Example: Account.
 - Description:** A large text area for entering a description.
- Buttons:** 'Save', 'Save & New', and 'Cancel' buttons are located at the top right of the form.
- Help:** A 'Help for this Page' link is located at the top right of the page.

ENABLE THIS OPTIONAL FEATURES IF YOU WANT TO :

This screenshot shows the 'New Custom Object' page in Salesforce Setup, specifically the 'Optional Features' section. The page includes a search bar at the top and a navigation menu with 'Setup', 'Home', and 'Object Manager'. The main content area is titled 'New Custom Object' and contains the following sections and options:

- Allow Reports:** A list of checkboxes for enabling reports and related features.
 - ☒ Allow Reports
 - ☐ Allow Activities
 - ☐ Track Field History
 - ☐ Allow in Chatter Groups
 - ☐ Enable Licensing
- Object Classification:**
 - When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more](#).
 - ☒ Allow Sharing
 - ☒ Allow Bulk API Access
 - ☒ Allow Streaming API Access
- Deployment Status:**
 - ☐ In Development
 - ☒ Deployed
- Search Status:**
 - When this setting is enabled, your users can find records of this object type when they search. [Learn more](#).
 - ☐ Allow Search
- Object Creation Options:** (Available only when custom object is first created)

6. Scroll to the bottom of the page, and select the **checkbox** Launch Custom Tab Wizard after saving this custom object. Selecting this box will add your custom object as a tab in Salesforce.

Sandbox: HemantSB | [Log out](#)

Search Setup

Setup Home Object Manager

SETUP New Custom Object

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

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

Deployment Status [What is this?](#)

☐ In Development

☒ Deployed

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

☐ Allow Search

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

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

[Save](#) [Save & New](#) [Cancel](#)

7. Click **Save**.

On the *New Custom Object Tab* page, click the **Tab Style** field, and choose a style. The style sets the icon to display in the UI for the object.

8. Click **Next**, **Next**, and **Save**.

In **Object Manager** it will appear like this :

Sandbox: HemantSB | [Log out](#)

Search Setup

Setup Home Object Manager

SETUP OBJECT MANAGER Test1

Details

- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Restriction Rules

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

Description

API Name
Test1__c

Custom
✓

Singular Label
Test1

Plural Label
Tests_1

Enable Reports
✓

Track Activities

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

NOTE : A custom object will always have a postfix __c , We can have maximum of 2000 custom object

What Are Fields ?

When we talk about Salesforce, Fields represent the data stored in the columns of a relational database. It can also hold any valuable information that you require for a specific object. Hence, the overall searching, deletion, and editing of the records become simpler and quicker.

Types of Fields in Salesforce:

- **Standard Field :** Standard Fields are the predefined fields in Salesforce that perform a standard task. The main point is that you can't simply delete a Standard Field until it is a non-required standard field.

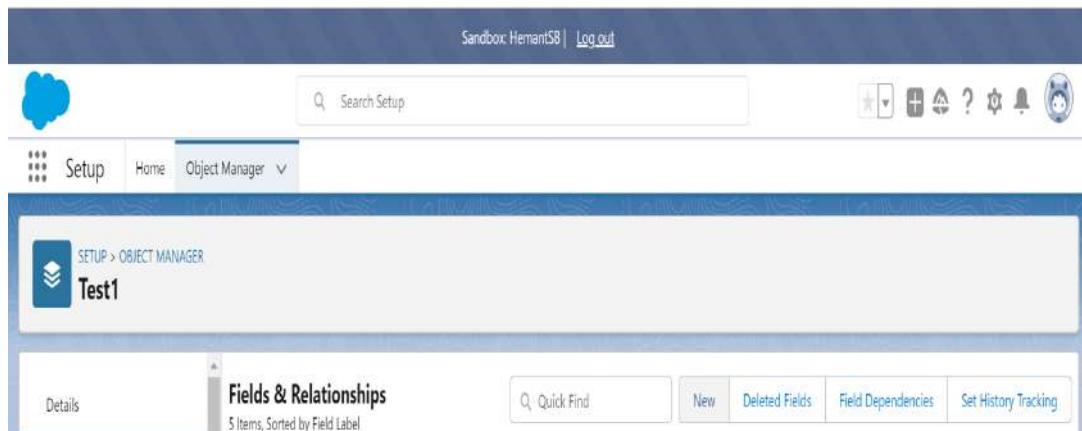
There are 4 predefined Fields That Is:

- Created By
 - Owner
 - Last Modified By
 - Field Made during Object Creation
-
- **Custom Field :** Custom field Are those field Which we create according to our need of an organization

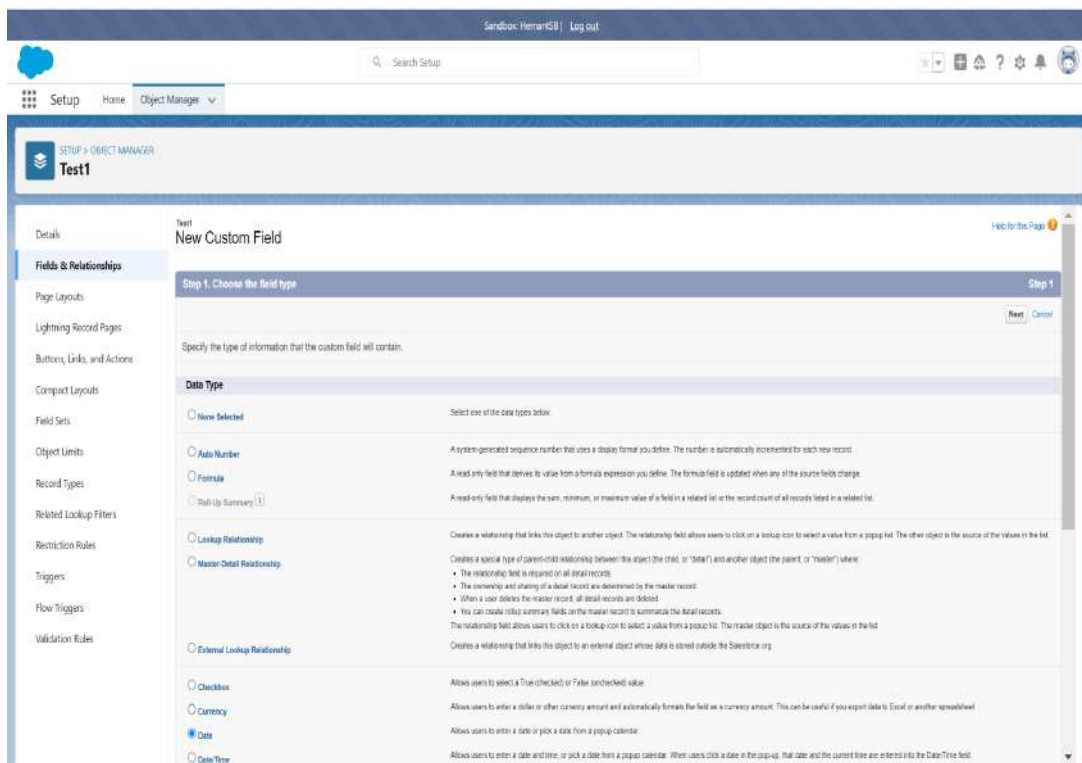
How to create a custom Field in Salesforce Objects :

Steps to create a custom field :

1. Click the **Object Manager** tab
2. In object Manager Go to Field & Relationship



- Next, choose a data type. Choosing a data type helps you format the field input. **For example**, if you create a field with the Date data type, users can enter a date or pick one from a popup calendar.



4. Click Next, and then fill out the Field Label, Field Name, input format (text, numbers, decimals, and so on), and description, and click Next.

The screenshot shows the Salesforce 'New Custom Field' setup page, Step 2 of 4: Enter the details. The page is titled 'New Custom Field' and has a sub-header 'Step 2. Enter the details'. The left sidebar shows the 'Setup' menu with 'Object Manager' selected. The main content area has the following fields:

- Field Label:** A text input field with the value 'Date'. A yellow tooltip indicates that the Field Label is used on objects, reports, and list views.
- Field Name:** A text input field with the value 'Date'.
- Description:** A text input field.
- Help Text:** A text input field.
- Required:** A checkbox that is unchecked. The text next to it says 'Always require a value in this field in order to save a record'.
- Add this field to existing custom report types:** A checkbox that is checked.
- Default Value:** A text input field with the value '&{&{Name}}'. A tooltip indicates that this is a formula that will be evaluated when the record is saved.

The bottom of the page has 'Previous', 'Next', and 'Cancel' buttons.

5. Select the field's visibility and edit access.
6. Click Next. Then click Save.

Basic Terms Used In Salesforce :

1. **Record** : An item you are tracking in your database; if your data is like a spreadsheet, then a record is a row on the spreadsheet
2. **Field** : A place where you store a value, like a name or address; using our spreadsheet example, a field would be a column on the spreadsheet
3. **Org** : Short for "organization," the place where all your data, configuration, and customization lives. You log in to access it. You might also hear this called "your instance of Salesforce"
4. **App** : A set of fields, objects, permissions, and functionality to support a business process
5. **Accounts** : Accounts are the companies you're doing business with. You can also do business with individual people (like solo contractors) using something called Person Accounts.

6. **Contacts** : Contacts are the people who work at an Account.
7. **Leads** : Leads are potential prospects. You haven't yet qualified that they are ready to buy or what product they need
8. **Opportunities** : Opportunities are qualified leads that you've converted. When you convert the Lead, you create an Account and Contact along with the Opportunity.

What Are The Different Types of Data Type / Field type in Salesforce ?

There Are 24 total Different Types of Data Type / Field type in Salesforce Explained below With Example :

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

1. Click the **Object Manager** tab
2. In object Manager Go to Field & Relationship
3. Click on New
4. Choose The Data type **Auto Formula** and click on **Next**

The screenshot shows the Salesforce Setup interface. The top navigation bar includes the Salesforce logo, a search bar, and user information. The left sidebar contains navigation links for 'Setup', 'Home', and 'Object Manager'. The main content area is titled 'New Custom Field' and shows 'Step 1: Choose the field type'. A table lists various data types with their descriptions:

Data Type	Description
<input type="radio"/> None Selected	Select one of the data types below
<input checked="" type="radio"/> Auto Number	A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
<input type="radio"/> 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.
<input type="radio"/> 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.
<input type="radio"/> 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.
<input type="radio"/> 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: <ul style="list-style-type: none">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 popup list. The master object is the source of the values in the list.
<input type="radio"/> External Lookup Relationship	Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.
<input type="radio"/> Checkbox	Allows users to select a True (checked) or False (unchecked) value.
<input type="radio"/> 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 want data to be local to another record's local.

5. Enter Field label and Display Format and a starting number

6. Click On Next , Next And Save

The screenshot shows the 'New Custom Field' configuration page in Salesforce. The left sidebar contains navigation links: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, Triggers, Flow Triggers, and Validation Rules. The main content area is titled 'New Custom Field' and is at 'Step 2: Enter the details'. The form includes the following fields: 'Field Label' with the value 'S_id', 'Display Format' with 'id-000' and an example 'A-00000 What is This?', 'Starting Number' with '0' and a checkbox for 'Generate Auto Number for existing records', 'Field Name' with 'S_id', 'Description', and 'Help Text' (all empty). At the bottom, there are checkboxes for 'External ID' (unchecked) and 'Add this field to existing custom report types that contain this entity' (checked). Navigation buttons 'Previous', 'Next', and 'Cancel' are present at the top right and bottom right of the form.

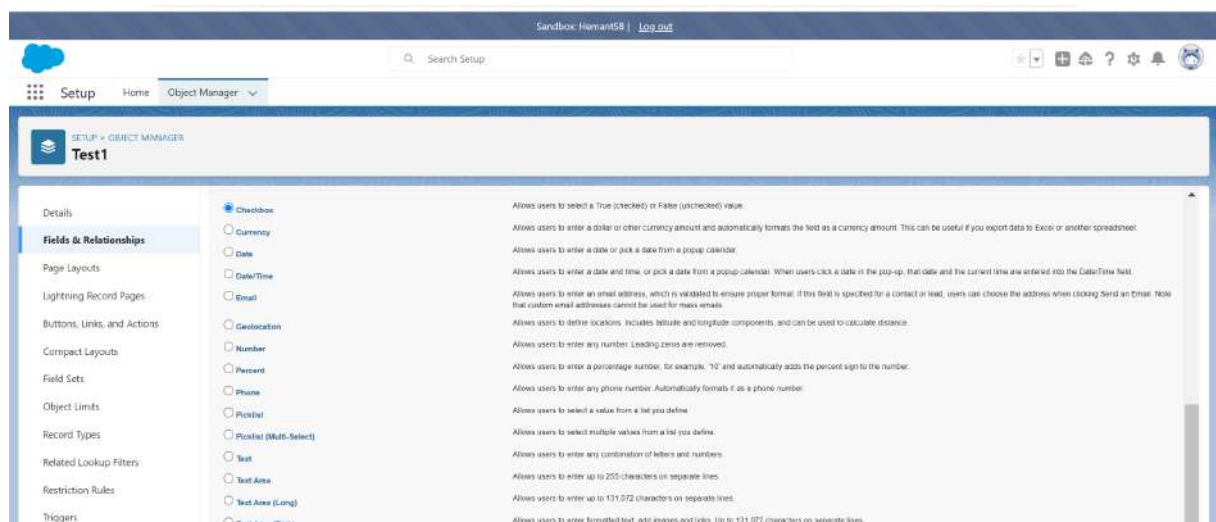
In Records We Can see This :

The screenshot shows the record details for a custom field named 'Test1'. The record is titled 't1'. The 'Details' tab is active, showing a table of field values. The table has two columns: the field name and its value. The values are: 'Test 1 Name' is 't1', 'Date' is empty, 'S_id' is 'id-00', 'Created By' is 'Hemant Duggal, 11/07/2023, 4:10 pm', 'Currency' is 'INR - Indian Rupee', and 'Last Modified By' is 'Hemant Duggal, 11/07/2023, 4:10 pm'. The top of the page shows the user 'Sandbox: Hemant58' and a search bar. The bottom of the page shows a toolbar with 'Edit', 'Delete', and 'Clone' buttons.

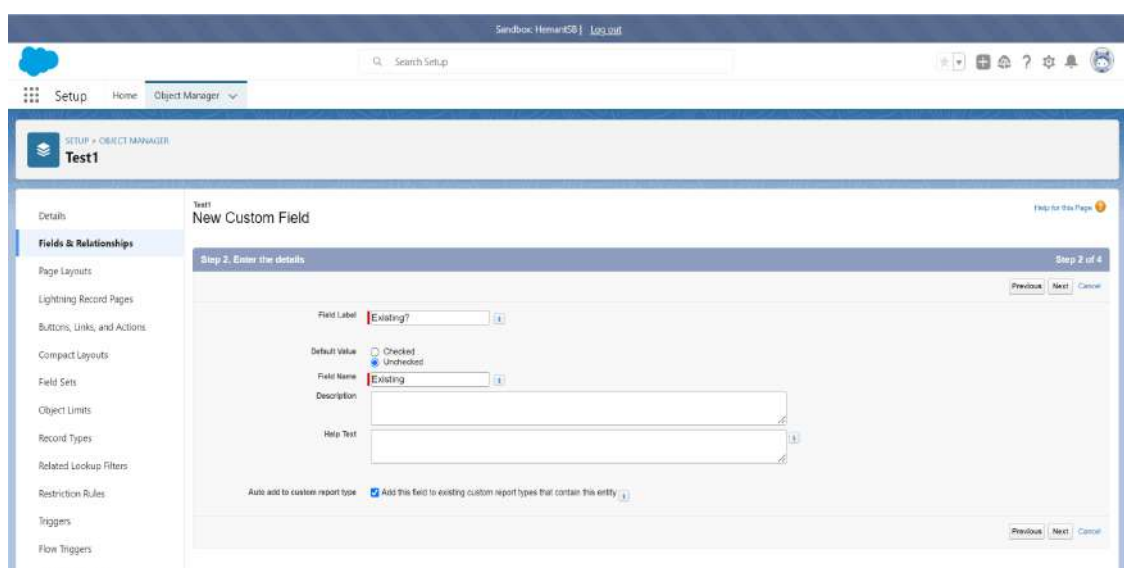
Field	Value
Test 1 Name	t1
Date	
S_id	id-00
Created By	Hemant Duggal, 11/07/2023, 4:10 pm
Currency	INR - Indian Rupee
Last Modified By	Hemant Duggal, 11/07/2023, 4:10 pm

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

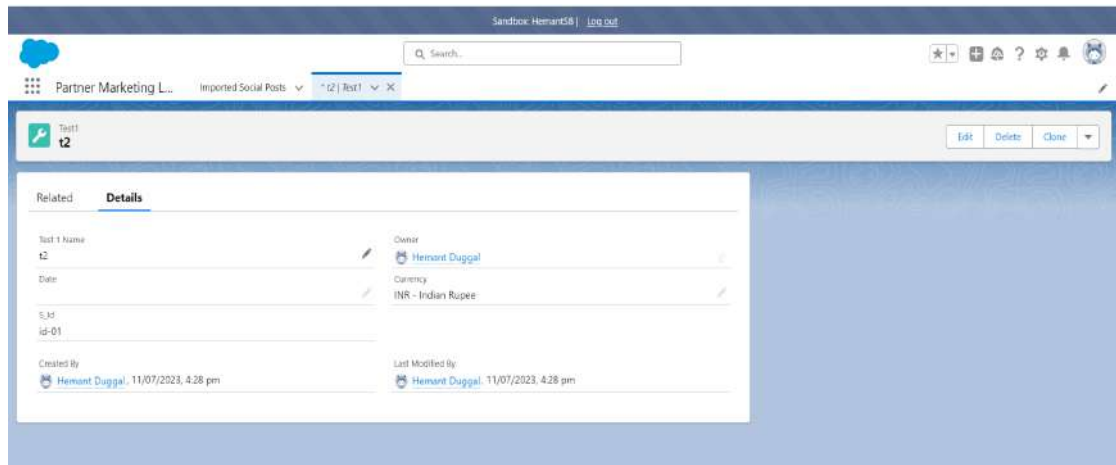
1. Click the **Object Manager** tab
2. In object Manager Go to Field & Relationship
3. Click on New
4. Choose The Data type **CheckBox** and click on **Next**



5. Enter Field label and Field Name and Click On **Next** , **Next** and **Save**.

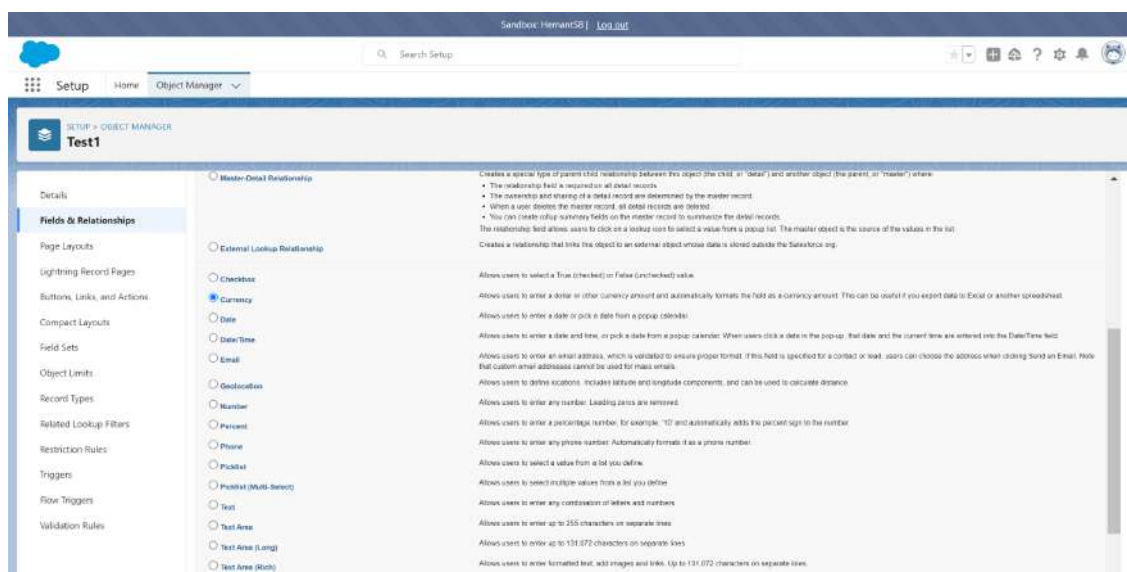


6. It will look like This in **Records** :



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

1. Click the **Object Manager** tab
2. In object Manager Go to Field & Relationship
3. Click on New
4. Choose The Data type **Currency** and click on **Next**



5. Enter Field label and Field Name and Click On Next , Next and Save.

The screenshot shows the Salesforce Setup interface, specifically the 'Object Manager' section. The left sidebar lists various setup options, with 'Fields & Relationships' selected. The main area displays the 'Enter the details' step for a new field. A yellow warning banner at the top states: 'Multiple currencies are enabled. You must set decimal places for each currency through Manage Currencies instead.' Below this, the 'Field Label' is set to 'Currency' and the 'Field Name' is also 'Currency'. The 'Length' is set to 16 and the 'Decimal Places' is set to 2. The 'Required' checkbox is checked, and the 'Auto add to custom report type' checkbox is also checked. The 'Default Value' field is empty. The 'Previous', 'Next', and 'Cancel' buttons are visible at the bottom right.

6. It will look like This in Records :

The screenshot shows the Salesforce Records interface for the 'Test1' object. A green notification banner at the top states: 'Test1 "t3" was created.' The record details are displayed in a table format. The 'Test1 Name' is 't3', the 'Owner' is 'Hemant Duggal', the 'Date' is '11/07/2023', the 'Currency' is 'INR - Indian Rupee', and the 'Created By' is 'Hemant Duggal, 11/07/2023, 4:34 pm'. The 'Edit', 'Delete', and 'Clone' buttons are visible at the top right.

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

1. Click the **Object Manager** tab
2. In object Manager Go to Field & Relationship
3. Click on New

4. Choose The Data type **Date** and click on **Next**

The screenshot shows the 'New Custom Field' setup page for 'Test1' in Salesforce. The page is titled 'Step 2: Enter the details' and is part of a 4-step process. The left sidebar shows the 'Fields & Relationships' section. The main form has the following fields: 'Field Label' (Enter_Date), 'Field Name' (Enter_Date), 'Description', and 'Help Text'. There are checkboxes for 'Required' (unchecked) and 'Always require a value in this field in order to save a record' (checked). The 'Auto add to custom report type' checkbox is also checked. The 'Default Value' field is set to 'Show Formula Editor'. The 'Previous', 'Next', and 'Cancel' buttons are at the bottom right.

5. Enter Field label and Field Name and Click On **Next** , **Next** and **Save**.

6. In Entering Record Pick A Date From Calendar and Then **Save It**

The screenshot shows the 'New Test1' record entry page. The page has a header 'New Test1' and a sub-header '* = Required Information'. The left sidebar shows the 'Information' section. The main form has the following fields: '* Test 1 Name' (t4), 'Date' (calendar), 'S_Id' (calendar), 'Existing?' (checkbox), 'Currency' (dropdown), and 'Enter_Date' (calendar). The 'Date' field is currently open, showing a calendar for July 2023. The 'Owner' field is set to 'Hemant Duggal'. The 'Currency' field is set to 'INR - Indian Rupee'. The 'Previous', 'Next', and 'Cancel' buttons are at the bottom right.

7. It will look like This in Records :

The screenshot shows a record view for a record named 't4'. A green notification banner at the top states 'Test1 "t4" was created.' The record details are as follows:

Field	Value
Test 1 Name	t4
Date	11/07/2023
Owner	Hemant Duggal
Currency	INR - Indian Rupee
Created By	Hemant Duggal, 11/07/2023, 4:42 pm
Last Modified By	Hemant Duggal, 11/07/2023, 4:42 pm

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.

1. Click the Object Manager tab
2. In object Manager Go to Field & Relationship
3. Click on New
4. Choose The Data type **Date/time** and click on **Next**

The screenshot shows the 'New Custom Field' setup screen. The 'Field Label' is 'Date/Time' and the 'Field Name' is 'Date_Time'. The 'Description' and 'Help Text' fields are empty. The 'Required' checkbox is checked, and the 'Auto add to custom report type' checkbox is also checked. The 'Default Value' field is empty. The 'Step 2 of 4' indicator is visible at the top right of the form.

5. Enter Field label and Field Name and Click On **Next** , **Next** and **Save**.

6. In Entering Record Pick A Date From Calendar and Then **Save It**

New Test1

* = Required Information

Information

* Test 1 Name

t7

Date

S_Id

Existing?

☐

Currency

Enter_Date

date with time

Date

11/07/2023

Time

12:00 pm

Owner

Hemant Duggal

Currency

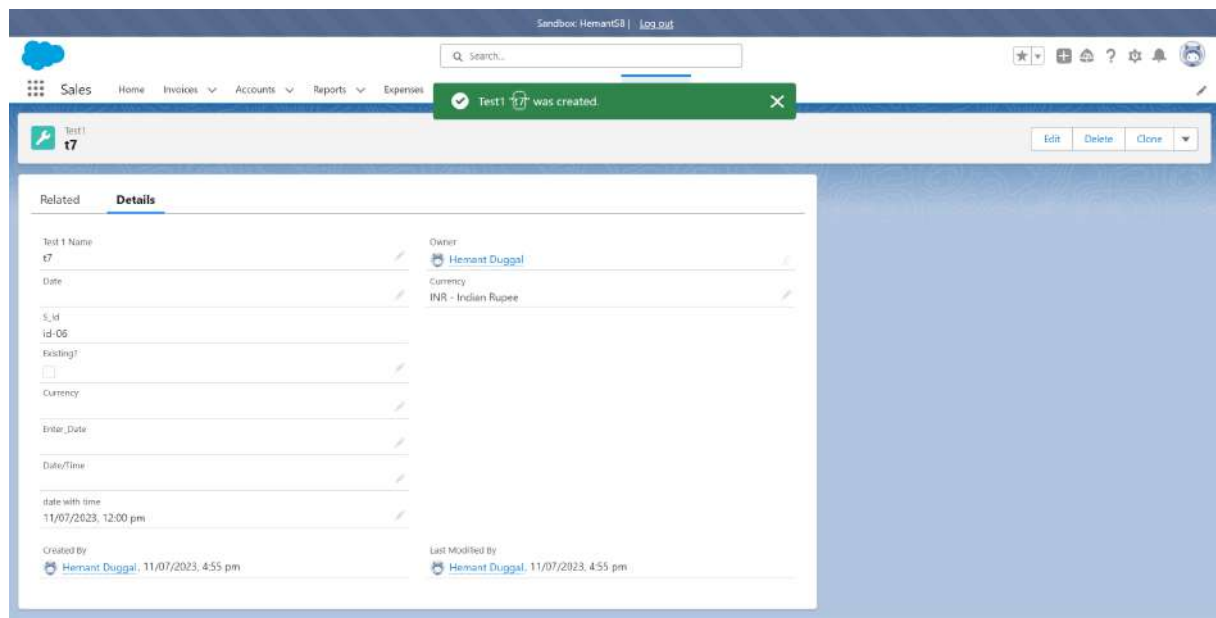
INR - Indian Rupee

Cancel

Save & New

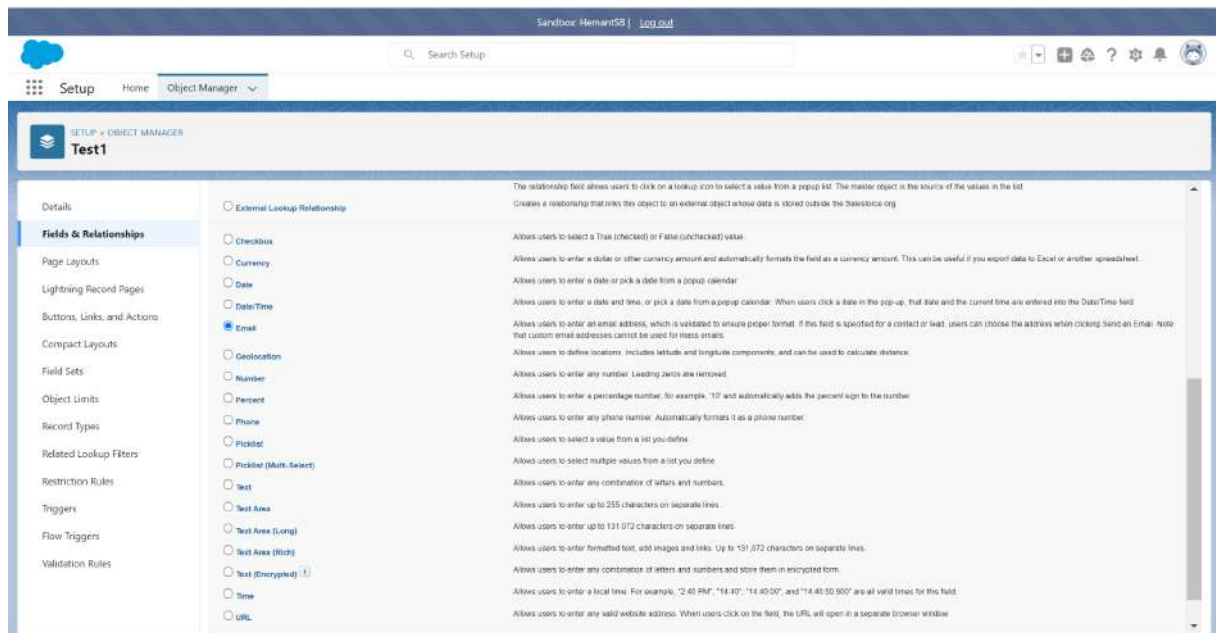
Save

7. It will look like This in Records :

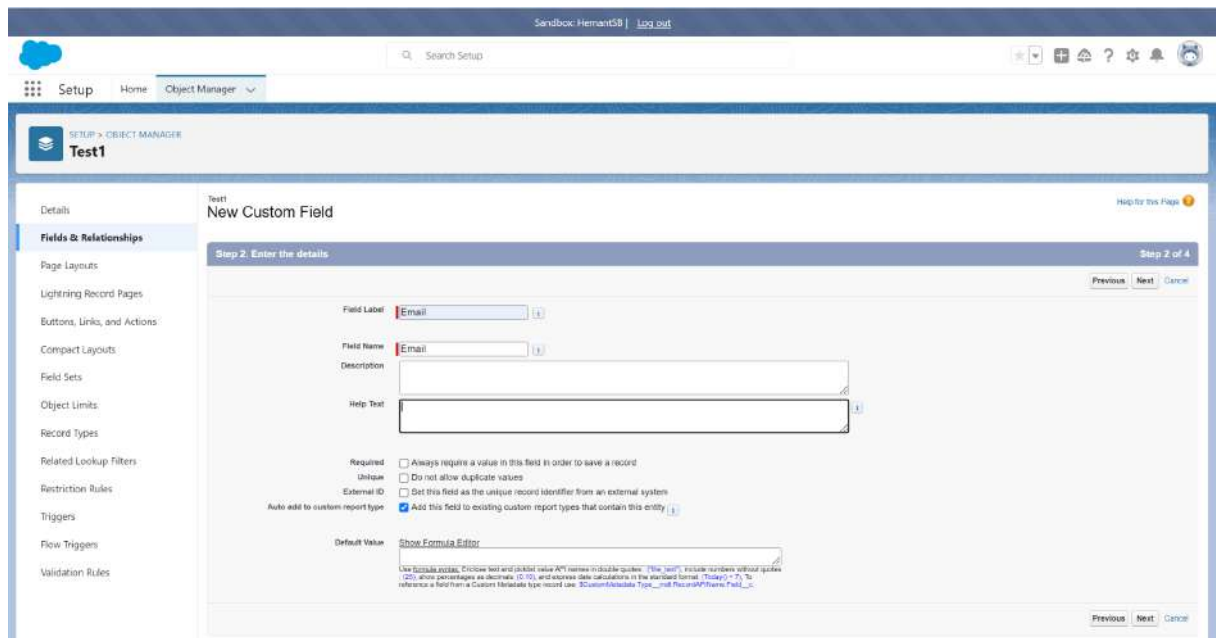


Email : Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.

1. Click the Object Manager tab
2. In object Manager Go to Field & Relationship
3. Click on New
4. Choose The Data type **Email** and click on **Next**



5. Enter Field label and Field Name and Click On **Next** , **Next** and **Save**.

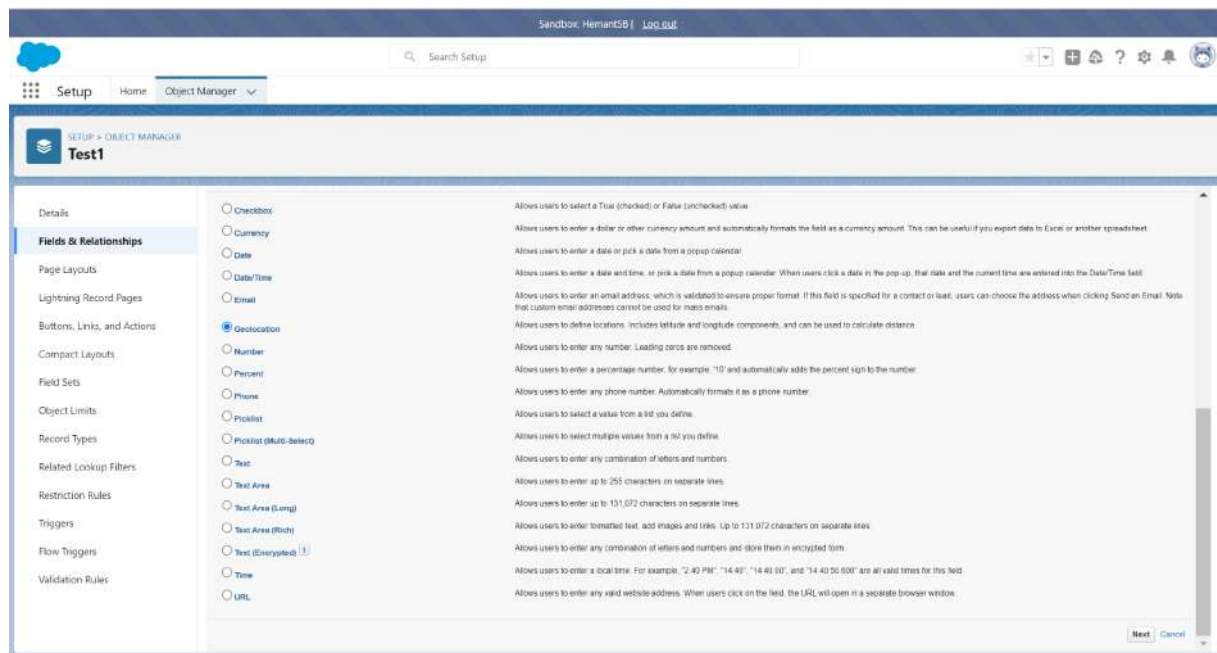


6. It will look like This in Records :

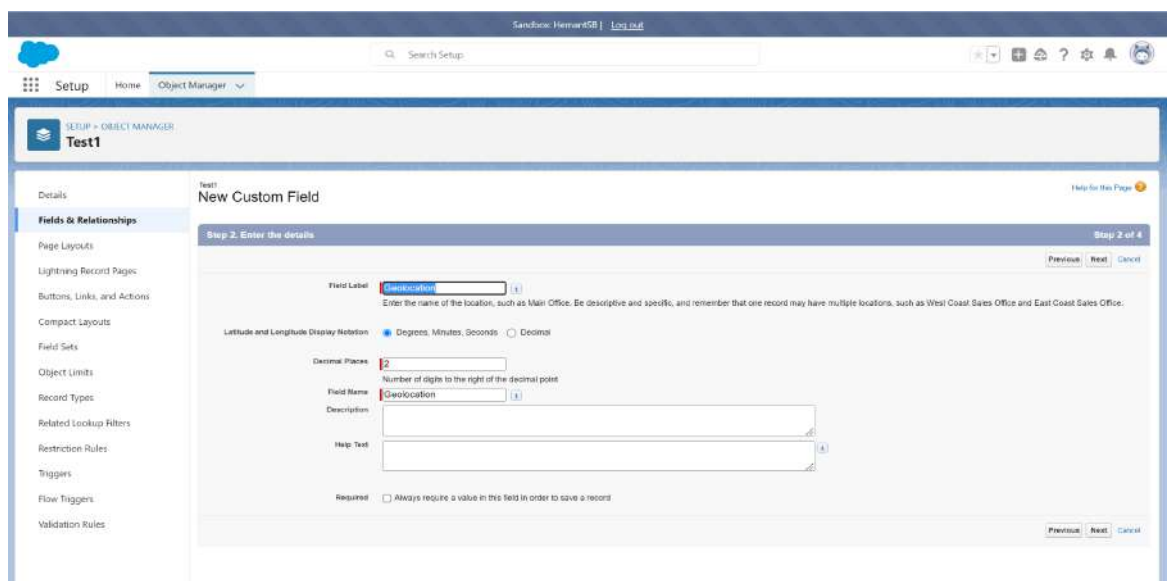
The screenshot displays a web application interface. At the top, there is a navigation bar with a search bar and a dropdown menu containing 'Sales', 'Home', 'Invoices', 'Accounts', 'Reports', and 'Expenses'. A green notification banner at the top center reads 'Test1 t8 was created.' Below this, the main content area shows the details of a record named 'Test1 t8'. The record is displayed in a table-like format with two columns: 'Related' and 'Details'. The 'Related' column contains fields for 'Test 1 Name' (t8), 'Date', 'S.H. id-07', 'Existing?' (checkbox), 'Currency', 'Enter Date', 'date with time', 'Email' (t8@gmail.com), and 'Created By' (Hemant Duggal, 11/07/2023, 5:00 pm). The 'Details' column contains fields for 'Owner' (Hemant Duggal), 'Currency' (INR - Indian Rupee), and 'Last Modified By' (Hemant Duggal, 11/07/2023, 5:00 pm). The interface also includes a sidebar on the right with a blue background and a top bar with a search bar and a dropdown menu.

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

1. Click the Object Manager tab
2. In object Manager Go to Field & Relationship
3. Click on New
4. Choose The Data type **Geolocation** and click on **Next**



5. Enter Field label and Field Name and Decimal Places and Click On Next , Next and Save.



6. Enter longitude and latitude In Record

Geolocation

Latitude

28.4089

Longitude

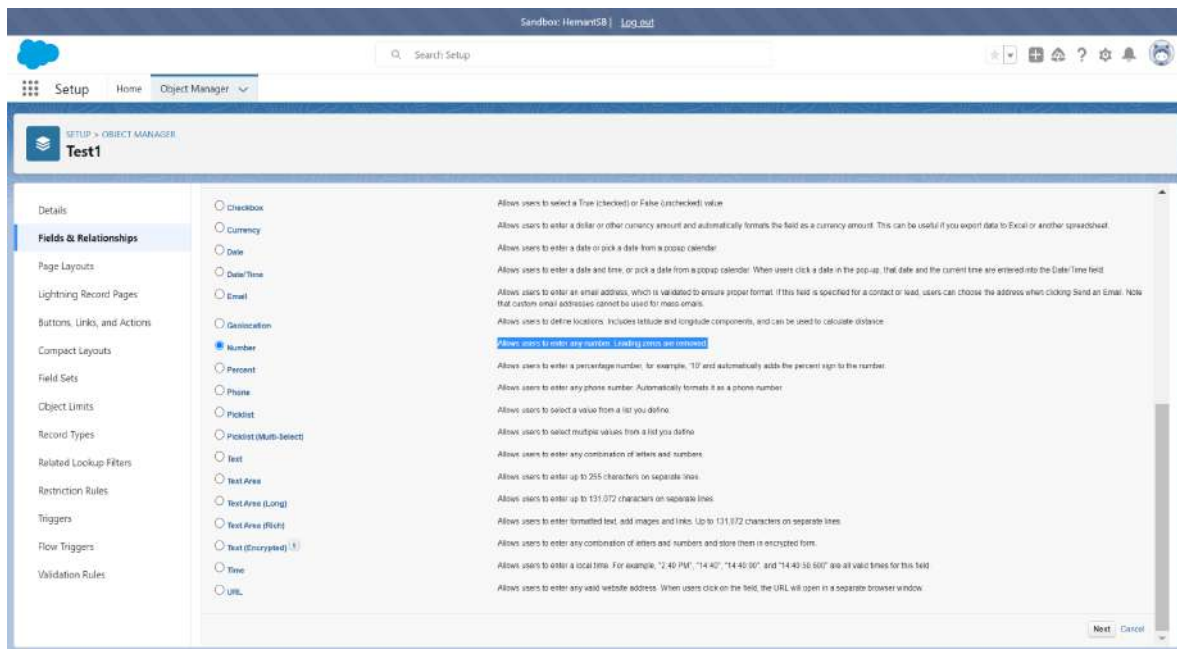
77.3178

7. It will look like This in Records :

The screenshot shows a web application interface for a CRM system. At the top, there's a navigation bar with a search bar and a menu. The main content area displays a record for 'Test1' with a 'Details' tab selected. The record fields are organized into two columns. The left column contains: 'Test 1 Name' (t9), 'Date', 'S_id' (id-08), 'Existing?' (checkbox), 'Currency', 'Enter Date', 'date with time', 'Email', 'Geolocation' (28.4089, 77.3178), and 'Created By' (Hemant Duggal, 11/07/2023, 5:09 pm). The right column contains: 'Owner' (Hemant Duggal), 'Currency' (INR - Indian Rupee), and 'Last Modified By' (Hemant Duggal, 11/07/2023, 5:09 pm). A large blue area is visible on the right side of the record details.

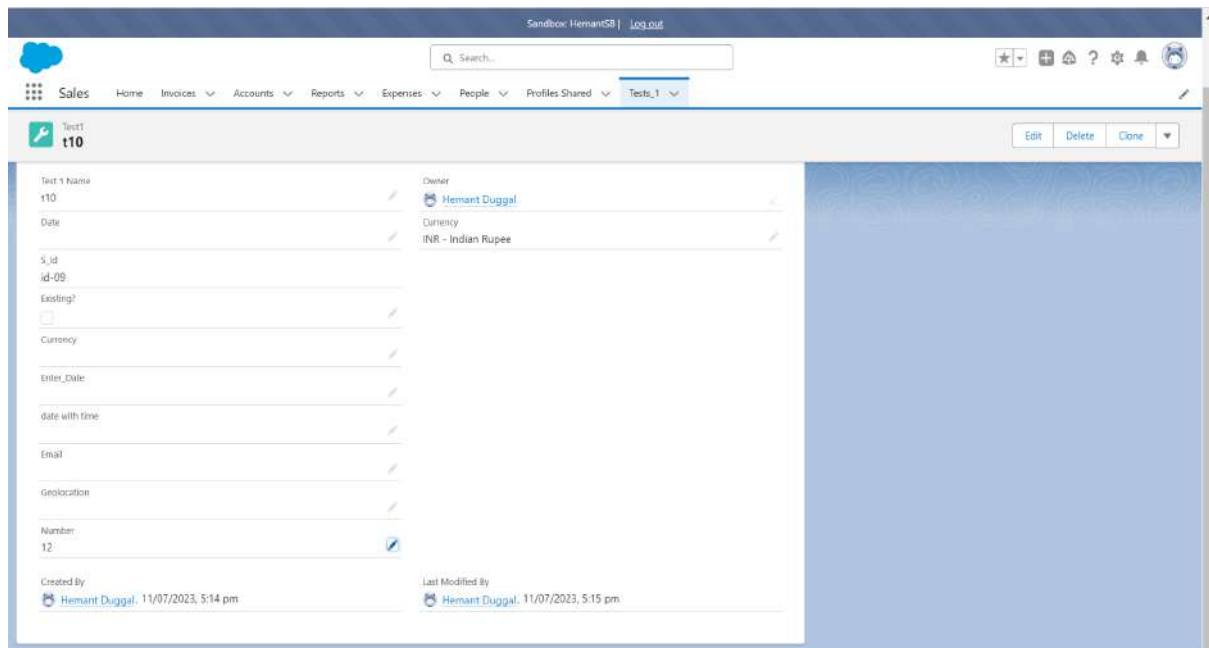
Number : Allows users to enter any number. Leading zeros are removed.

1. Click the Object Manager tab
2. In object Manager Go to Field & Relationship
3. Click on New
4. Choose The Data type **Number** and click on Next



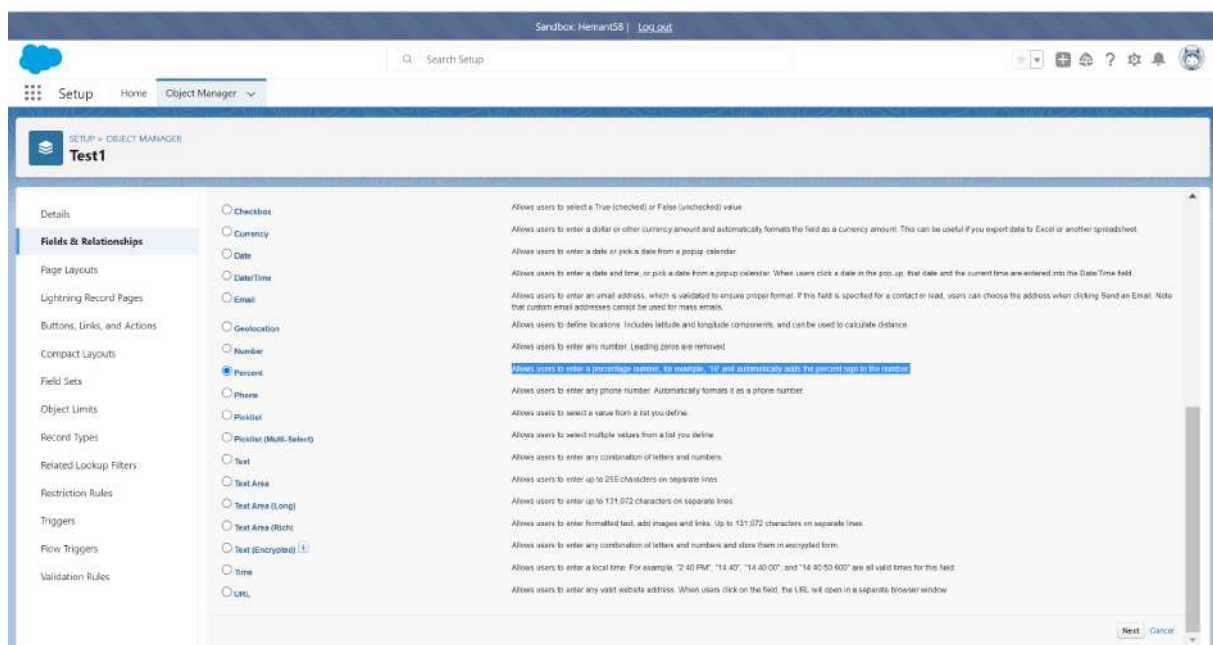
5. Enter Field label and Field Name and Length(max) and Decimal Places and Click On Next , Next and Save.

6. It will look like This in Records :



Percent : Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number

1. Click the Object Manager tab
2. In object Manager Go to Field & Relationship
3. Click on New
4. Choose The Data type **Percent** and click on **Next**



5. Enter Field label and Field Name and Click On Next and Length(max) and Decimal Places , Next and Save.

Sandbox: Hemant58 | Log out

Setup Home Object Manager

SETUP > OBJECT MANAGER

Test1

New Custom Field

Step 2: Enter the details

Field Label: Percentage

Length: 18

Decimal Places: 0

Field Name: Percentage

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 formulas to calculate field values. Follow test and point value API names in double quotes. "The sum" inside numbers without spaces. "20" where percentages as decimals. (2/10), and express date calculations in the standard format. "Today" + "7" * 24 reference a field from a Custom Metadata type record use: \$CustomMetadataType__mdt.RecordNameField__c.

Previous Next Cancel

6. It will look like This in Records :

Sandbox: Hemant58 | Log out

Sales Home Invoices Accounts Reports Expenses

Test1 "t11" was created.

Edit Delete Clone

Test1

Date

Sales ID

id-10

Existing?

Currency

Enter Date

Date with time

Email

Geolocation

Number

Percentage

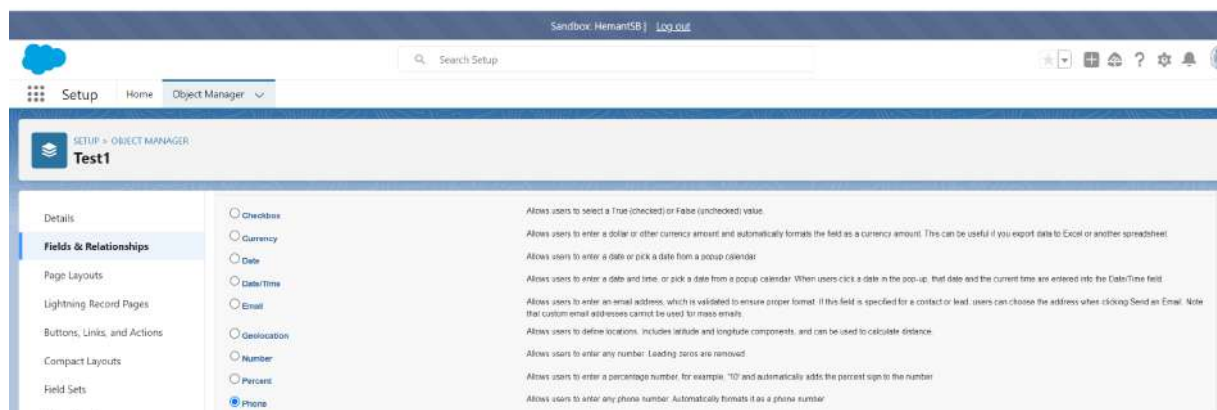
10%

Created By: Hemant Duggal, 11/07/2023, 5:24 pm

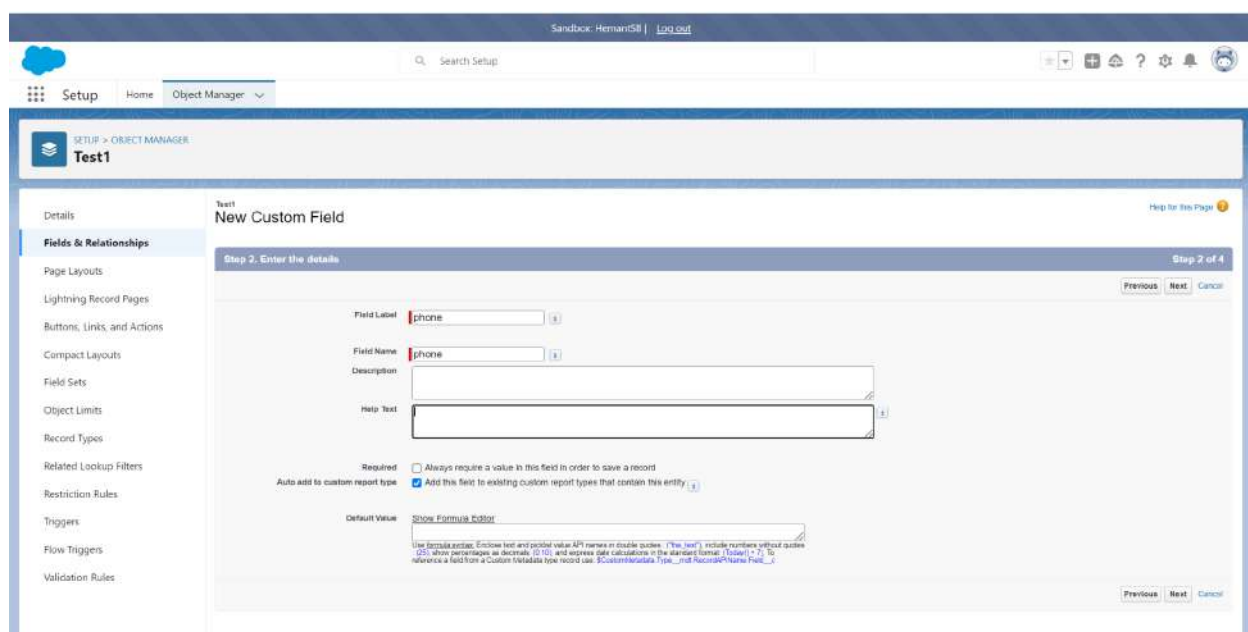
Last Modified By: Hemant Duggal, 11/07/2023, 5:24 pm

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

1. Click the Object Manager tab
2. In object Manager Go to Field & Relationship
3. Click on New
4. Choose The Data type **Phone** and click on **Next**



5. Enter Field label and Field Name and Click On **Next** , **Next** and **Save**.



6. It will look like This in Records :

The screenshot shows the Salesforce 'Records' page for an object named 'Test1'. A green notification bar at the top states 'Test1 t12 was created.' The page features a sidebar with navigation links: Sales, Home, Invoices, Accounts, Reports, and Expenses. The main content area displays a form for 'Test1' with the following fields: S_id, id-11, Existing? (checkbox), Currency, Enter_Date, date with time, Email, Geolocation, Number, Percentage, phone, and 123456789. The form is set against a blue background with a subtle pattern.

Picklist : It Allows users to select a value from a list you define.

1. Click the Object Manager tab
2. In object Manager Go to Field & Relationship
3. Click on New
4. Choose The Data type Picklist and click on Next

The screenshot shows the Salesforce 'Setup' page, specifically the 'Object Manager' section. The 'Fields & Relationships' tab is selected, and the 'Picklist' option is chosen. The page displays a list of data types and their descriptions:

- ☐ Checkboxes: 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 (Rich): Allows users to enter up to 131,072 characters on separate lines.
- ☐ Text Area (HTML): 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", and "14:40:00" 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.

5. Enter Field label and Field Name and Click On values enter values, with each value separated by a new line. **Example Male ,Female ,Others**
6. Click On **Next , Next and Save.**
7. It will look like This in Records :

Gender Picklist?

--None--

✓ --None--

Male

Female

Other

Save & New

Save

Sandbox: HemantGB | [App Store](#)

Search...

Sales Home Invoices Accounts Reports Expenses

Test1 t13 was created.

Edit Delete Clone

Test1 t13

id=12

Existing?

Currency

Enter Date

date with time

Email

Geolocation

Number

Percentage

phone

Gender Picklist?

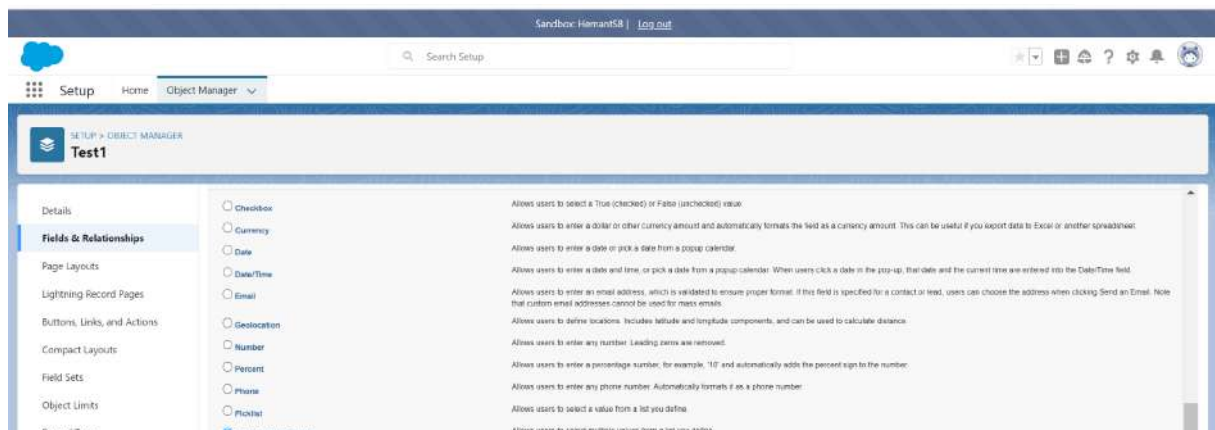
Male

Created By
Hemant Duggal, 11/07/2023, 6:00 pm

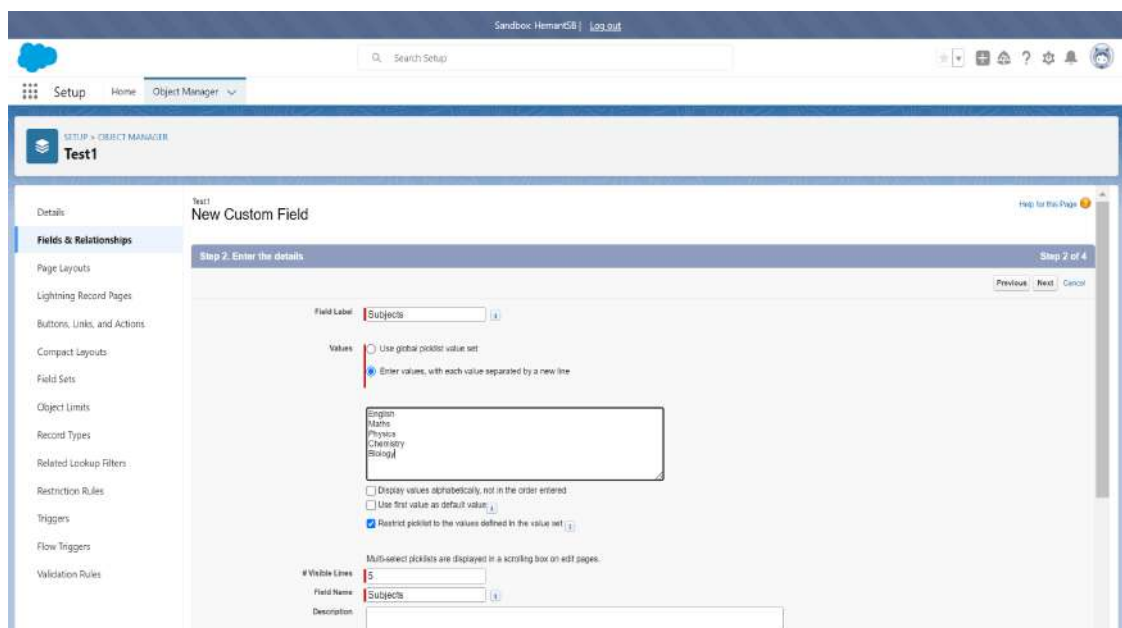
Last Modified By
Hemant Duggal, 11/07/2023, 6:00 pm

Picklist (Multiselect) : Allows User to select multiple values from a list you define.

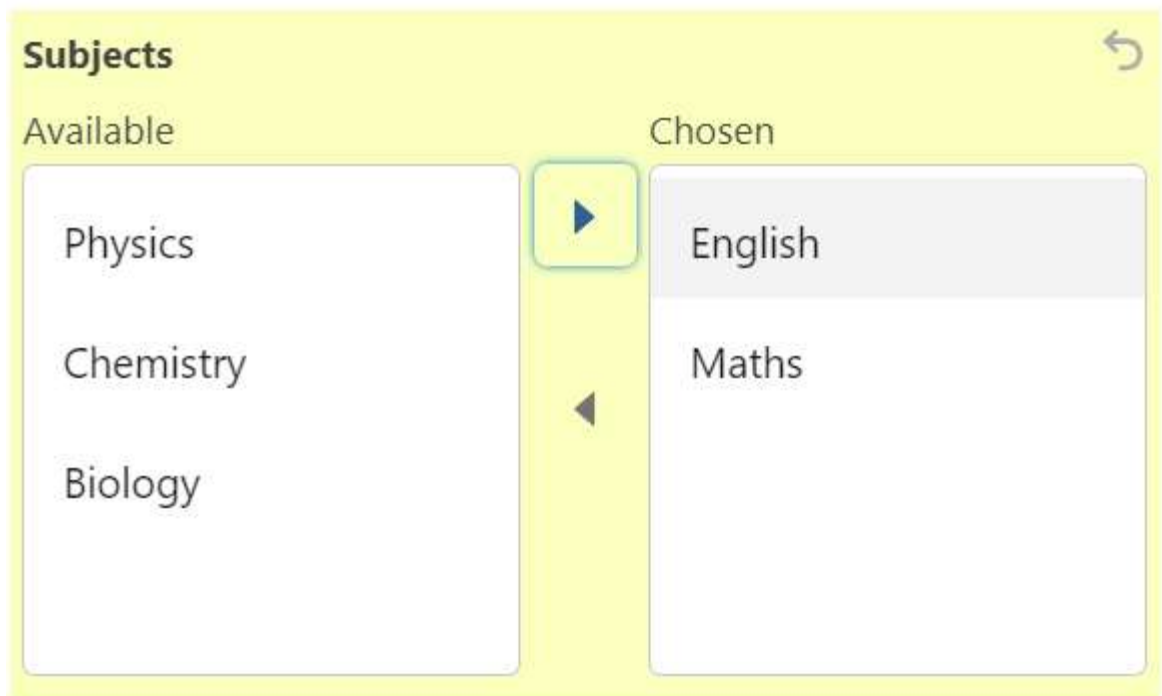
1. Click the **Object Manager** tab
2. In object Manager Go to Field & Relationship
3. Click on **New**
4. Choose The Data Type Picklist (Multiselect) and click on Next



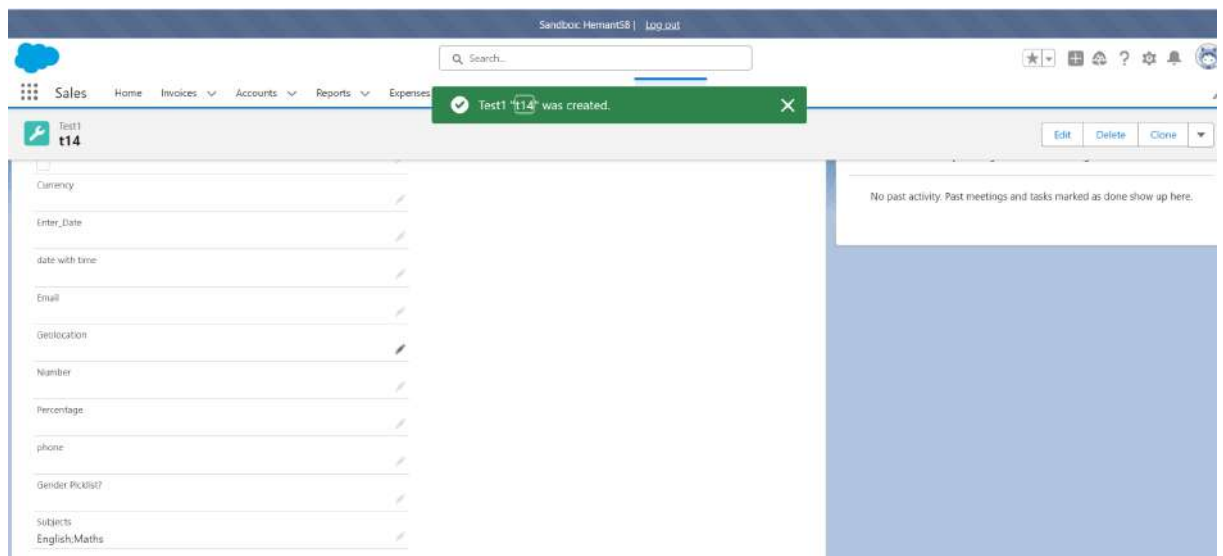
5. Enter Field label and Field Name and Enter visible lines and enter values whatever you want to add and Click On **Next** , **Next** and **Save**.



6. It will look like This in Records :

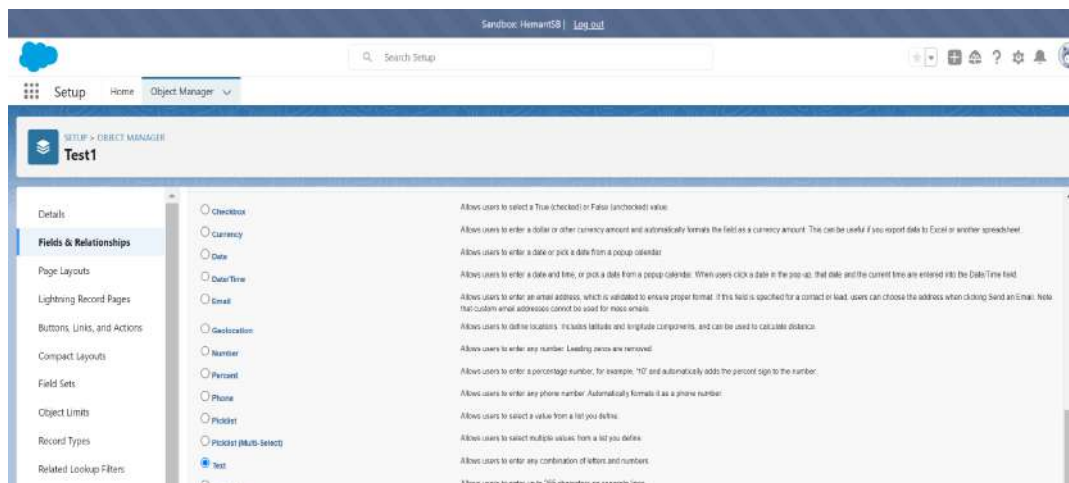


7. And After That it will final look like this :

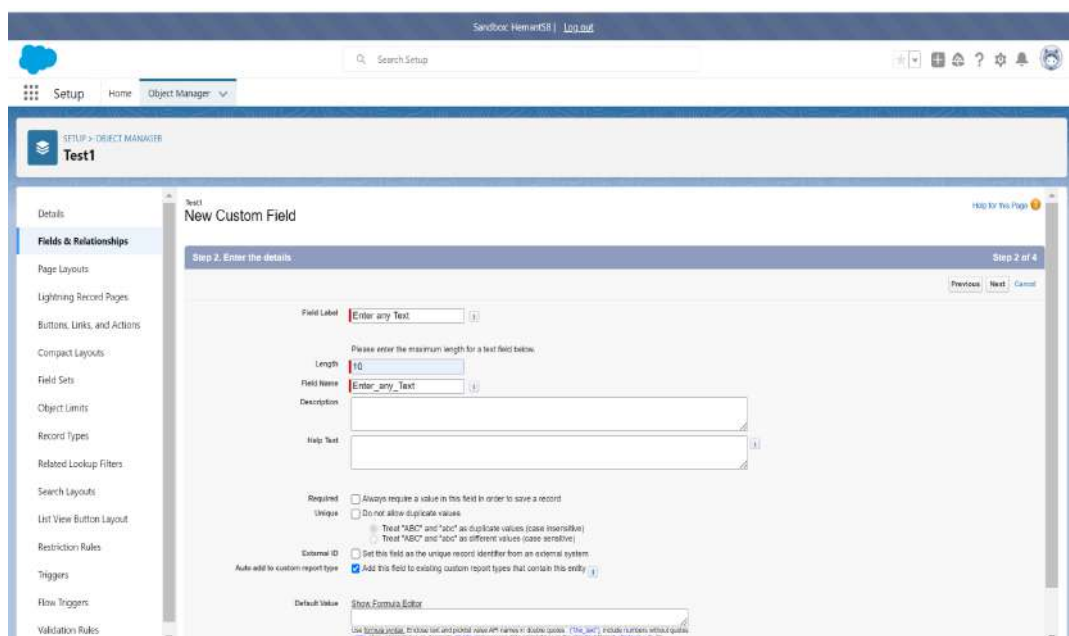


Text : Allows users to enter any combination of letters and numbers.

1. Click the **Object Manager** tab
2. In object Manager Go to Field & Relationship
3. Click on **New**
4. Choose The Data type **Text** and click on **Next**



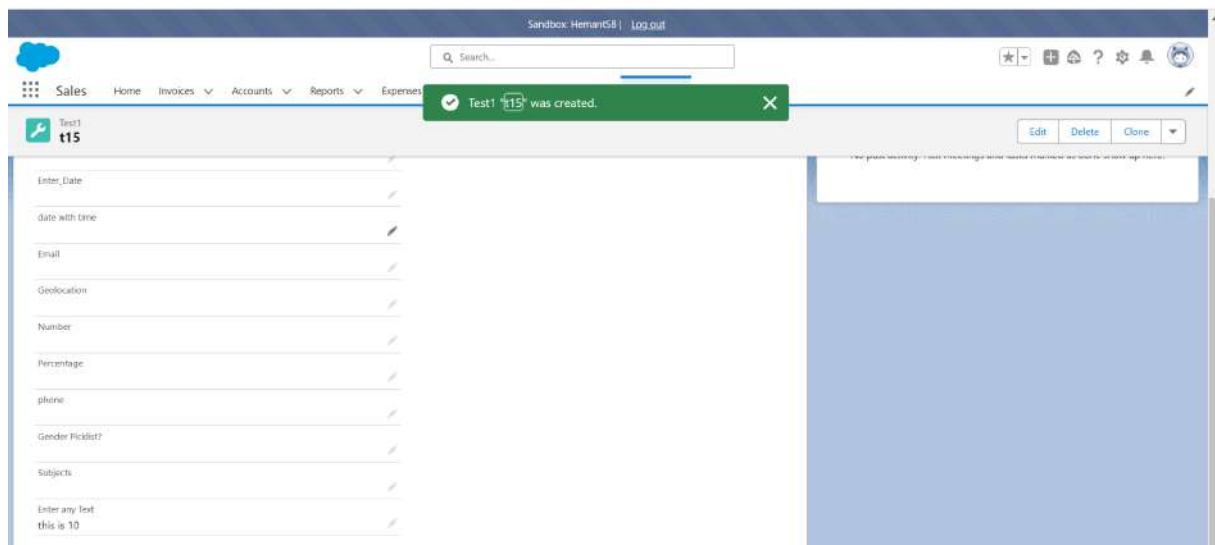
5. Enter **Field label** and **Field Name** and **Enter Length** Click On **Next , Next and Save.**



6. It will look like This in Records : **Enter Text**

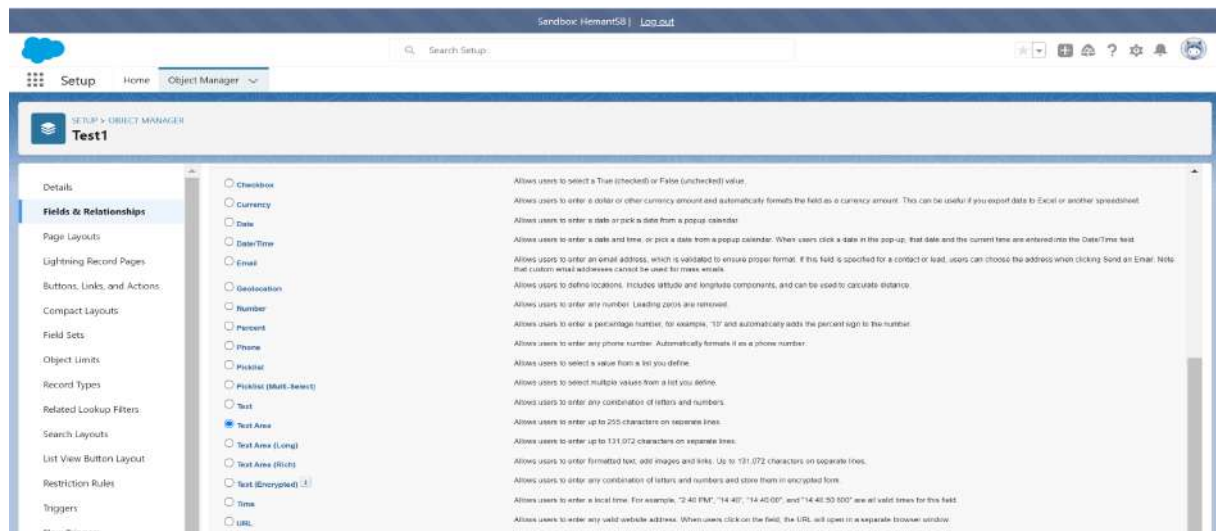


A screenshot of a text input field within a record view. The field is highlighted with a yellow border. Above the field, the text "Enter any Text" is displayed. Inside the field, the text "this is 10" is entered. A small circular arrow icon is visible in the top right corner of the field.

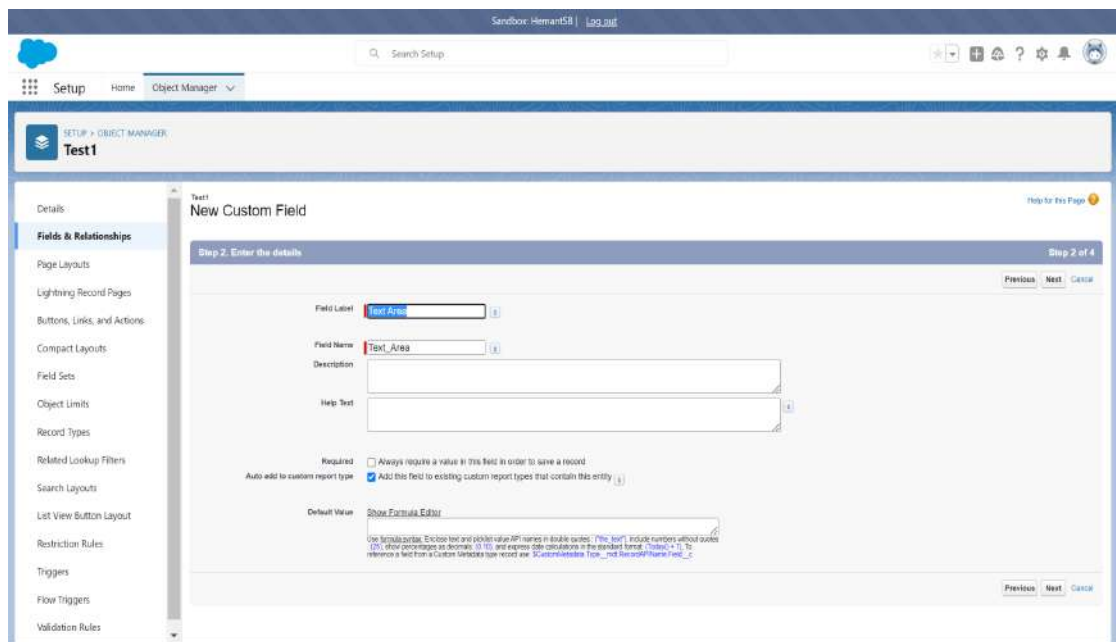


Text Area : Allows users to enter up to 255 characters on separate lines.

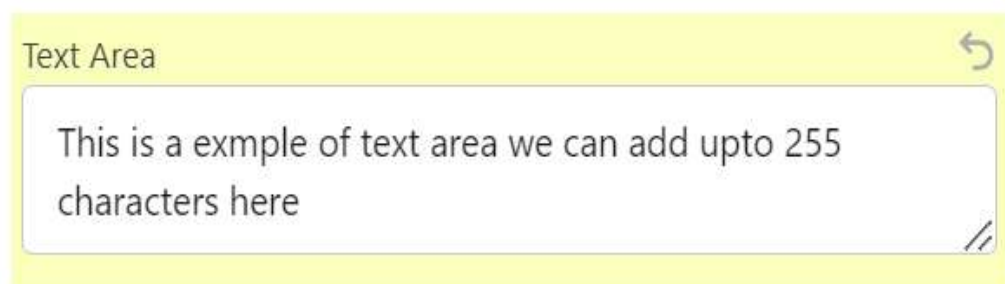
1. Click the **Object Manager** tab
2. In object Manager Go to Field & Relationship
3. Click on **New**
4. Choose The Data type **Text Area** and click on **Next**

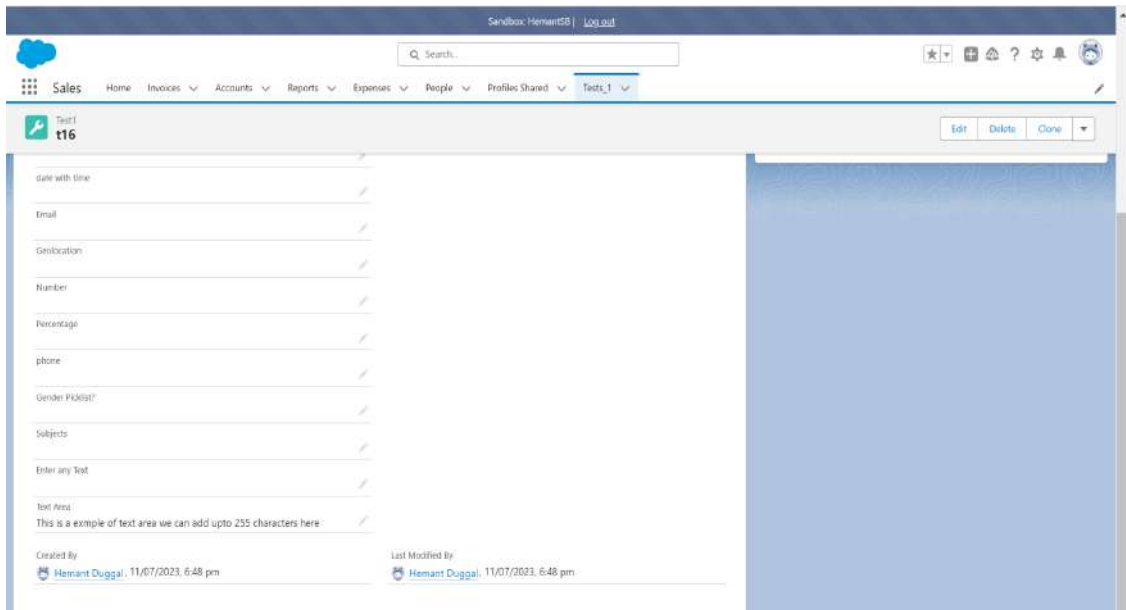


5. Enter Field label and Field Name and Click On Next , Next and Save.



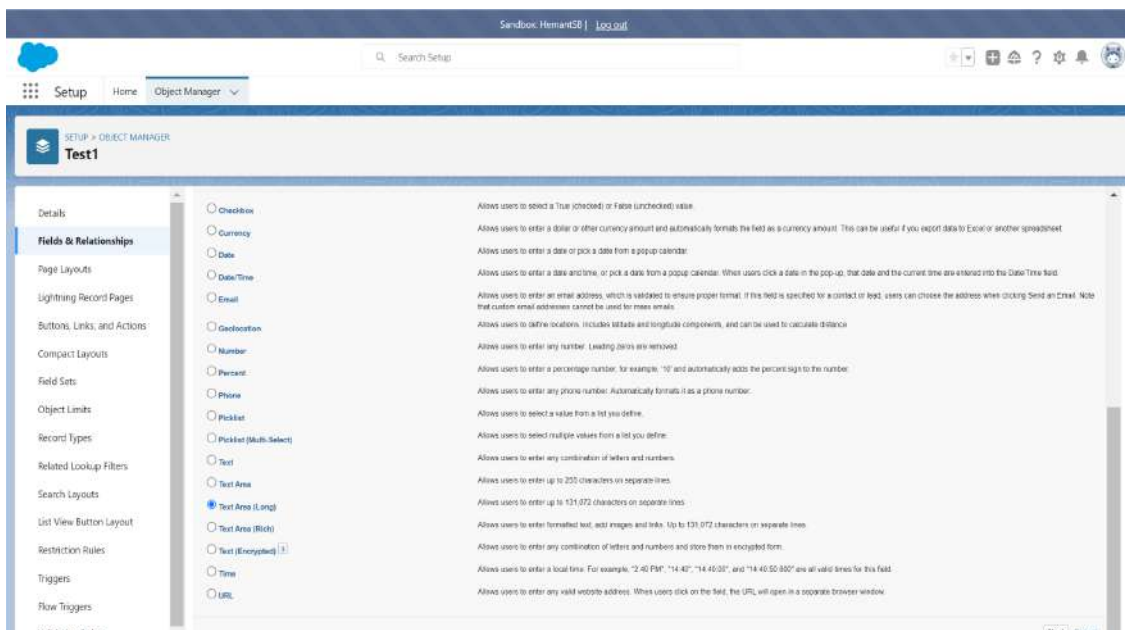
6. It will look like This in Records :





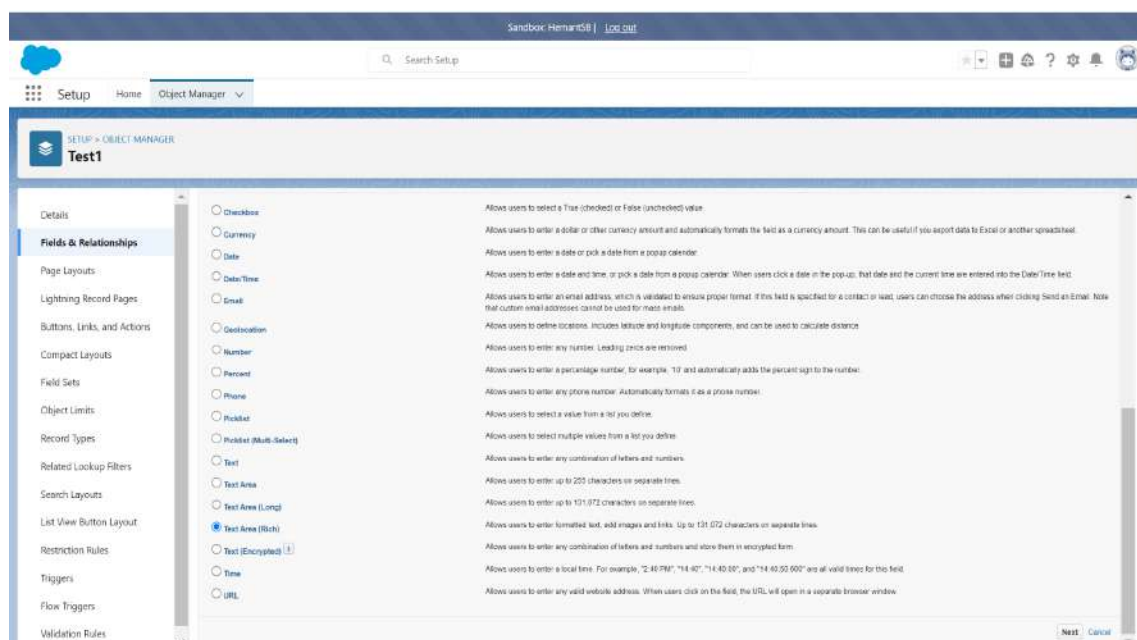
Text Area Long : Allows users to enter up to 131,072 characters on separate lines

1. Click the **Object Manager** tab
2. In object Manager Go to Field & Relationship
3. Click on **New**
4. Choose The Data type **Text Area Long** and click on **Next**



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

1. Click the **Object Manager** tab
2. In object Manager Go to Field & Relationship
3. Click on **New**
4. Choose The Data type **Text Area Rich** and click on **Next**



5. Enter **Field label and Field Name** and Enter Length For **Example : 32,768** and also add **Visible lines** for **Example : 25** , It must be greater than 10 else it will give an error Click On **Next , Next and Save.**

Sandbox: Human500 | Log out

Setup Home Object Manager

Test1

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

Triggers

Flow Triggers

Validation Rules

New Custom Field

Step 2: Enter the details

Field Label: Rich Text

Length: 32,768 (Max 131,072)

Visible Lines: 25

Field Name: Rich_Text

Description:

Help Text:

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

Previous Next Cancel

6. It will look like This in Records :

Rich Text

Salesforce Sans 12


B *I* U ~~ABC~~

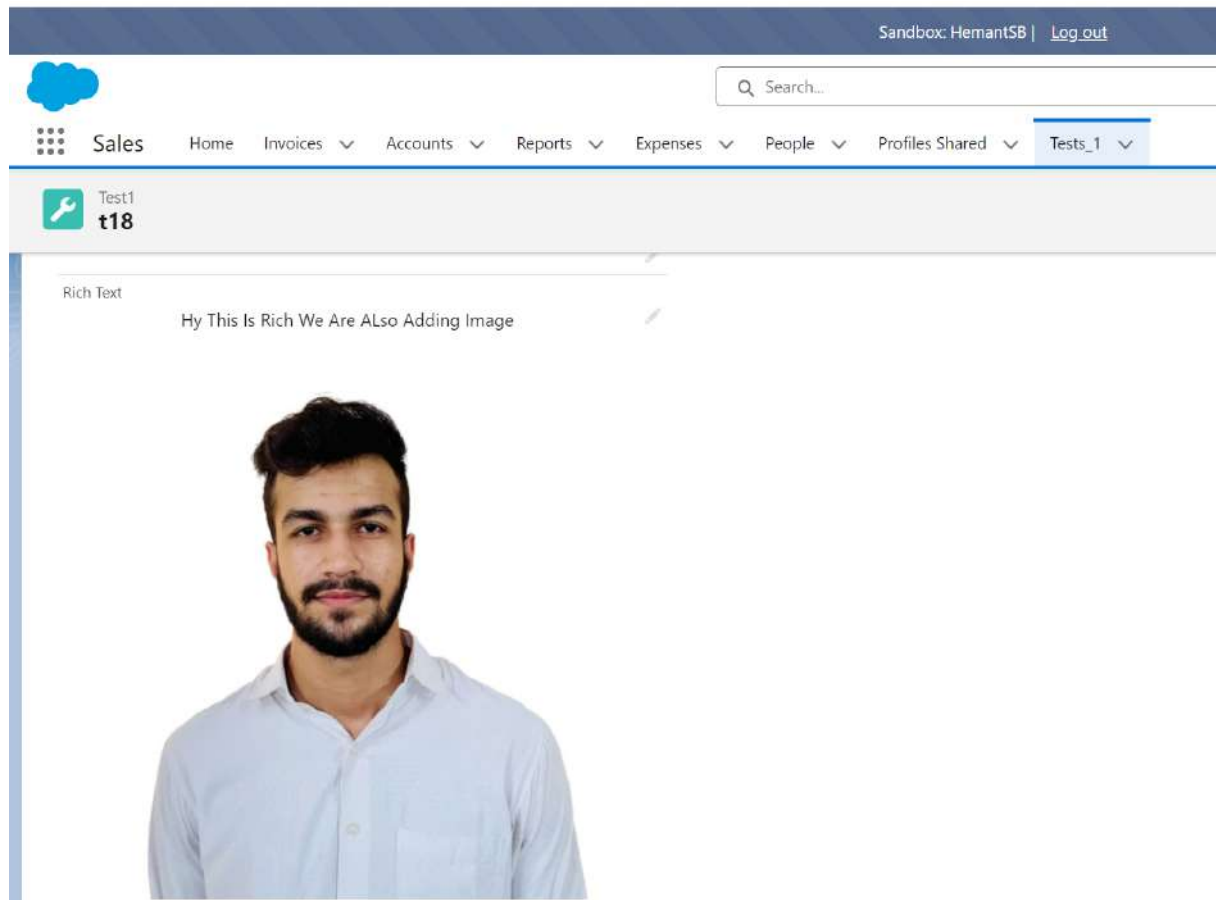
-

-

-

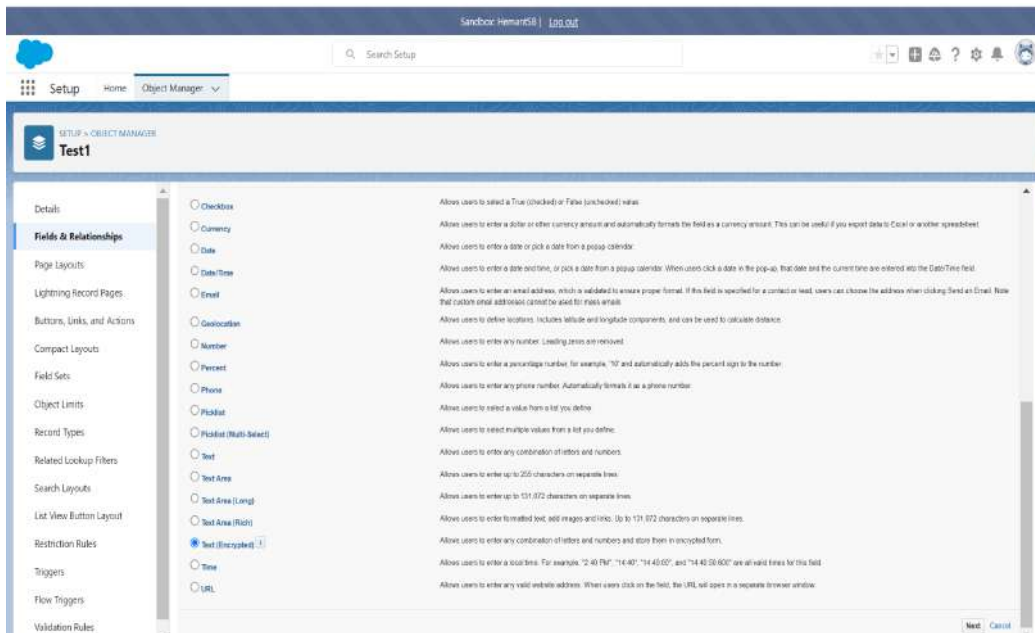
-



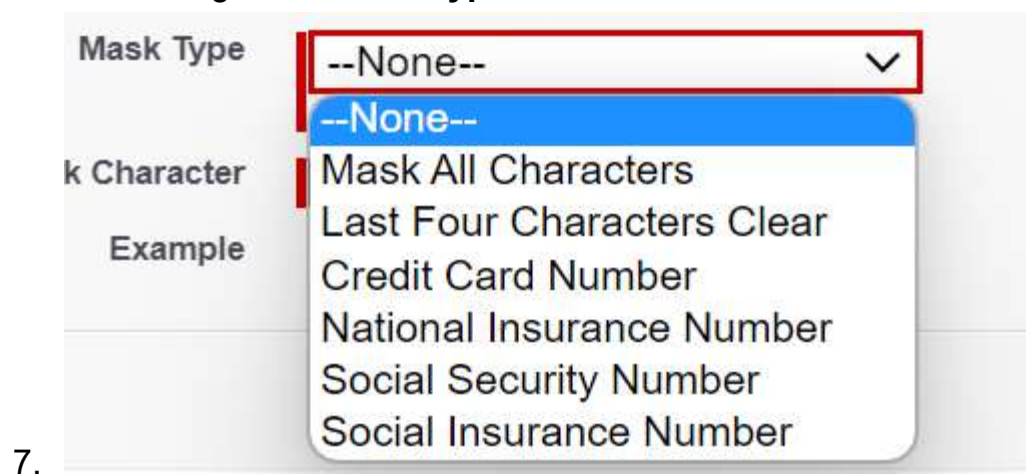


Text Encrypted : Allows users to enter any combination of letters and numbers and store them in encrypted form

1. Click the **Object Manager** tab
2. In object Manager Go to Field & Relationship
3. Click on **New**
4. Choose The Data type **Text Encrypted** and click on **Next**



5. Enter Field label and Field Name
6. Enter Length Add **Mask type**



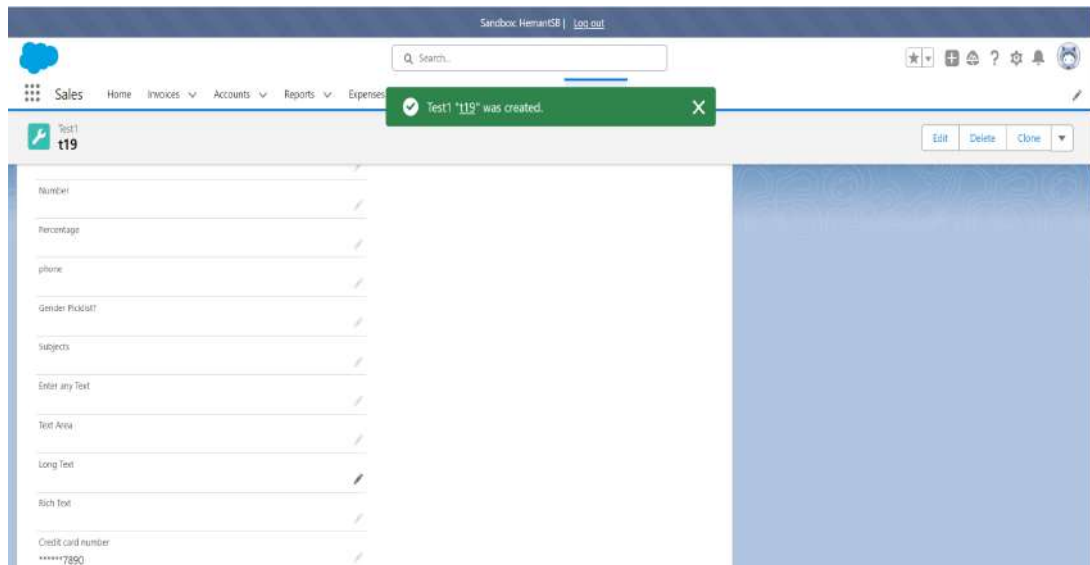
7.

8. After That Add A Mask character on it : For **Example** :



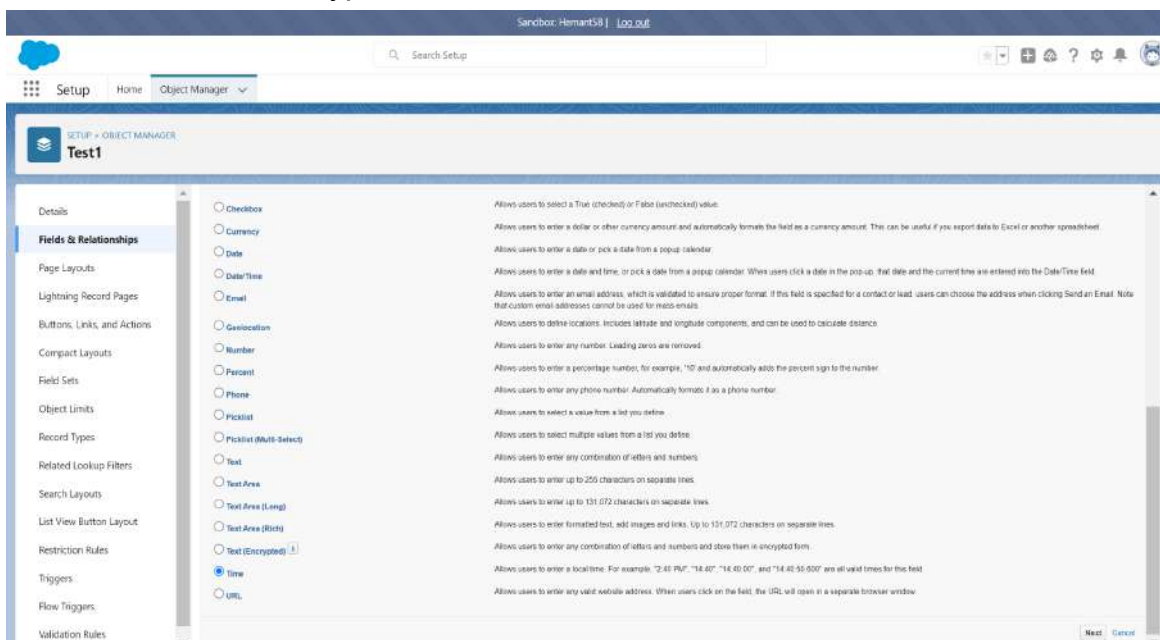
9. Click On **Next** , **Next** and **Save**.

10. It will look like This in Records :



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.

1. Click the **Object Manager** tab
2. In object Manager Go to Field & Relationship
3. Click on **New**
4. Choose The Data type **Time** and click on **Next**



5. Enter Field label and Field Name and Click On **Next** , **Next** and **Save**.

The screenshot shows the Salesforce 'New Custom Field' setup page, Step 2: Enter the details. The page is titled 'New Custom Field' and 'Step 2 of 4'. The left sidebar contains a navigation menu with options: 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, Triggers, Flow Triggers, and Validation Rules. The main content area has the following fields and options:

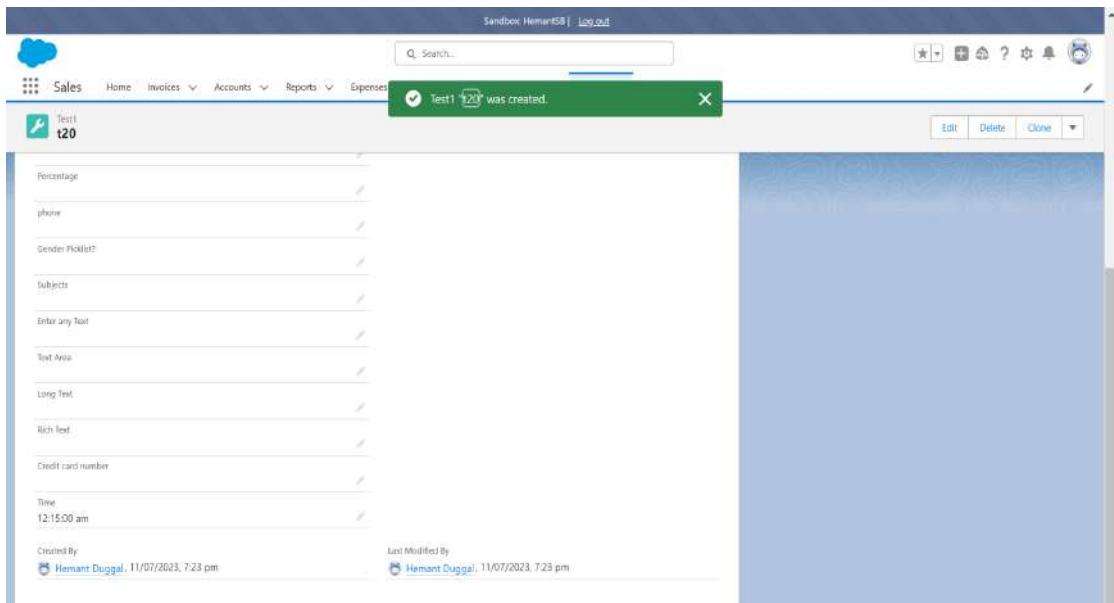
- Field Label:
- Field Name:
- Description:
- Help Text:
- Required: ☐ Always require a value in this field in order to save a record
- Auto add to custom report type: ☒ Add this field to existing custom report types that contain this entity
- Default Value:

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

6.

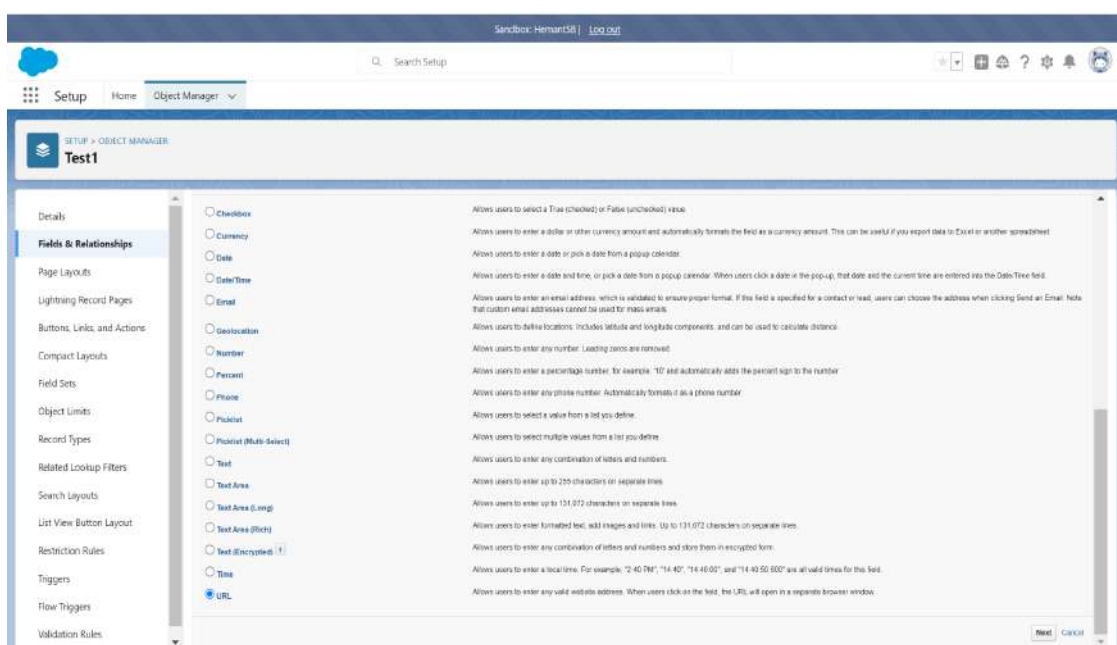
7. It will look like This in Records :

The screenshot shows a time picker dropdown menu. The menu is open, displaying a list of times in 15-minute increments, starting from 12:00 am and ending at 1:00 am. The times are: 12:00 am, 12:15 am, 12:30 am, 12:45 am, and 1:00 am. The menu has a scroll bar on the right side. At the bottom right of the menu, there is a clock icon.



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

1. Click the **Object Manager** tab
2. In object Manager Go to Field & Relationship
3. Click on **New**
4. Choose The Data type **Url** and click on **Next**



5. Enter Field label and Field Name and **Click On Next , Next and Save.**

The screenshot shows the Salesforce Setup interface for creating a new custom field. The left sidebar lists various setup options, with 'Fields & Relationships' selected. The main content area is titled 'New Custom Field' and shows 'Step 2: Enter the details'. The form includes fields for 'Field Label' (URL), 'Field Name' (URL), 'Description', and 'Help Text'. There are checkboxes for 'Required' (unchecked) and 'Auto add to custom report type' (checked). The 'Default Value' is set to 'Show Formula Editor'. Navigation buttons 'Previous', 'Next', and 'Cancel' are visible at the bottom right.

6. It will look like This in Records :

The screenshot shows the Salesforce Records view for the 'Test1' object. A green notification banner at the top states 'Test1 "t21" was created.' The left sidebar shows the 'Test1' object with a list of records. The main content area displays a list of records with columns for 'phone', 'Gender Picklist?', 'Subjects', 'Enter any Text', 'Text Area', 'Long Text', 'Rich Text', 'Credit card number', 'Time', and 'URL'. The 'URL' field contains the value 'https://www.salesforce.com/in/'. The bottom of the screen shows the 'Created By' and 'Last Modified By' information, both attributed to 'Hemant Duggal' on 11/07/2023 at 7:28 pm.

Relationship: A relationship is a bi-directional association between two objects. Relationships allow us to create links between one object and another. Relationships are created by creating custom relationship fields on an object. This is done so that when users view records, they can also see and access related data.

Relationship is generally of six types:-

1. Self-relationship
2. Master-detail relationship
3. Lookup relationship
4. External lookup relationship
5. Many-to-many relationship (junction object)
6. Hierarchical relationship

➤ **Self Relationship:-**

Self-relationship simply means creating a relationship with itself. In this, we can relate an object with itself by look-up.

Example: Account object has a field called Parent Account which shows the self-relationship in Account. We can have a maximum of 25 self lookups .

➔ **Many-to-Many relationships:-**

In many-to-many relationships, records of particular objects are linked to multiple records of different objects and vice versa. There is no such field as a many-to-many relationship in Salesforce, we can create a many-to-many relationship by creating two master-detail relationships with a common object. This common object can also be specified as the junction object.

➤ **External relationship:-**

This is a new field type that has been introduced with *Salesforce Connect*. To link an external object to another external object, we use the external relationship field. It supports standard look-up relationships that use 18 characters Salesforce Id for the association.

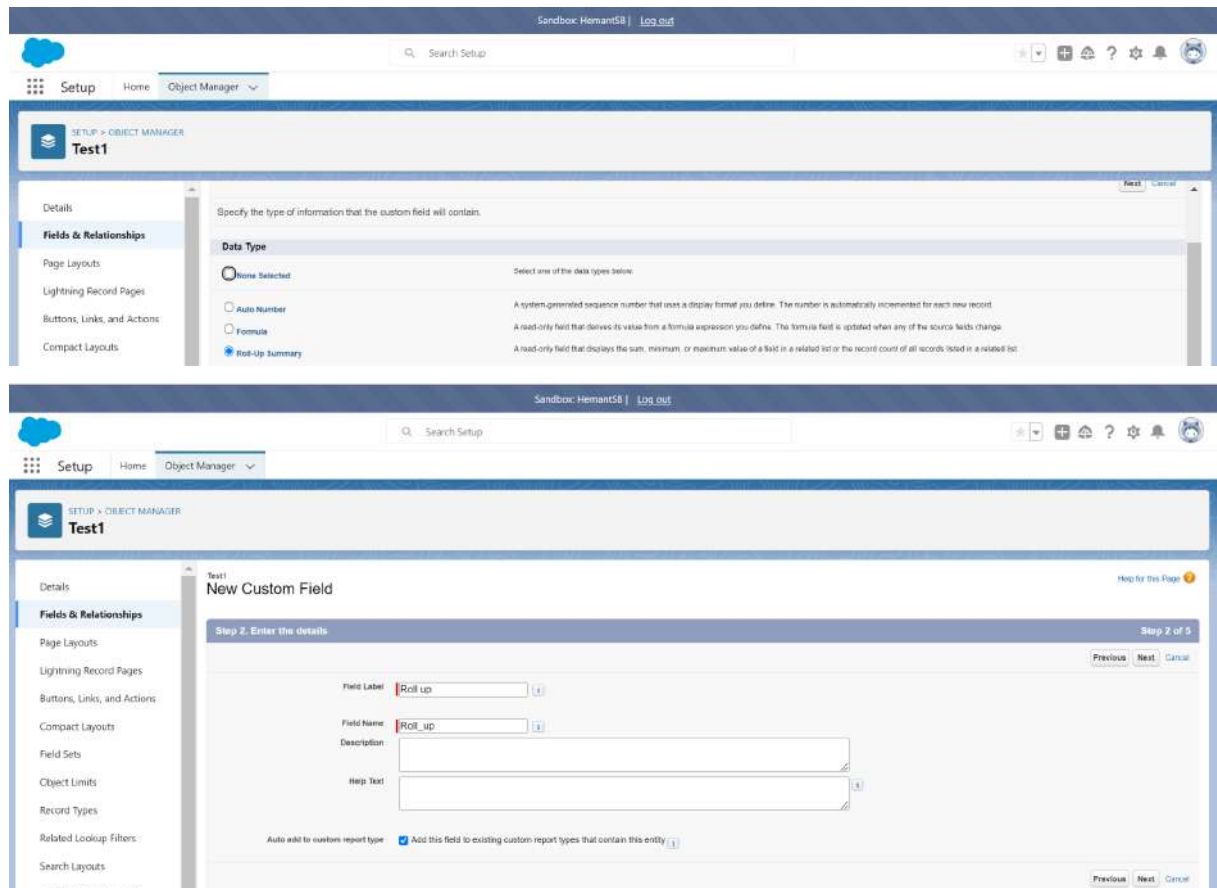
How to enable Roll up summary in Fields?

- Create a new custom object first and after that make a new field in **Master Detail Relationship**
- Click on **Next**
- Choose **Related to** : Previous object in which you want to create
- Click **Next**
- Enter **Field Name** and **Field Label** and **Child Relationship Name** Click On **Next,Next and Save**

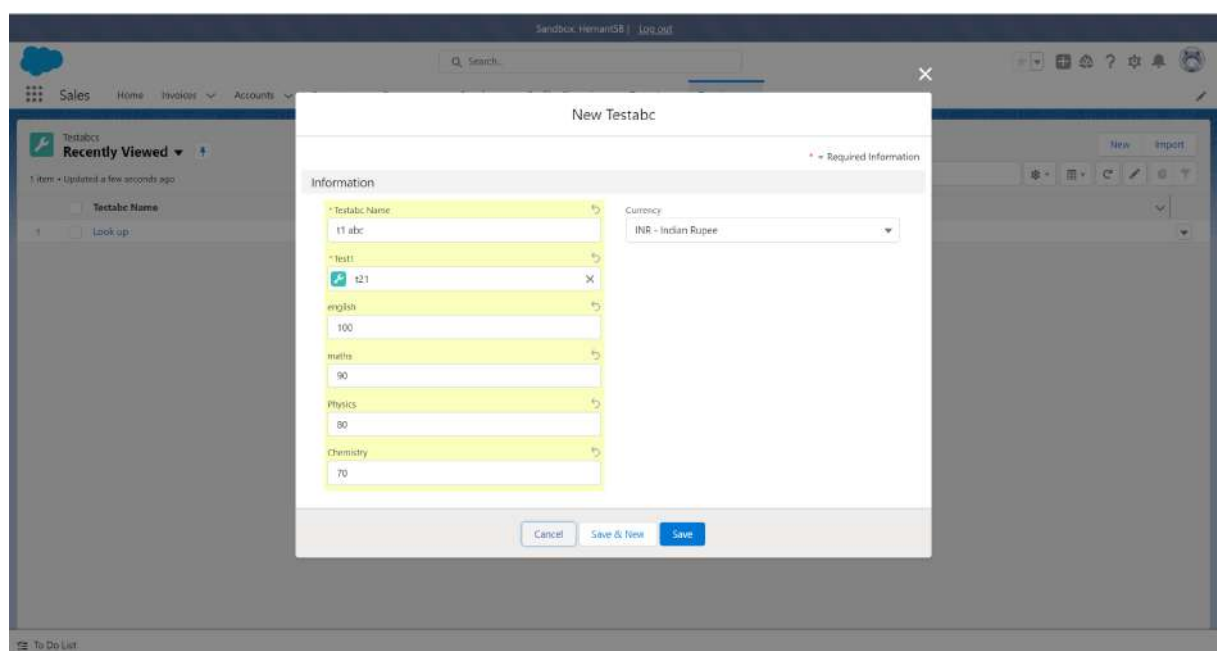
Roll Up Summary : A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

Roll-up summary:-

- Roll-Up Summary fields are used to summarize data with any associated child object.
- Roll-Up Summary field can only be created for Master-detail Relationship.
- Roll-Up Summary field can not be created for Lookup Relationship.
- It Derives the data from child Objects.
- We can't change the field type of a field that we reference in a roll-up summary field.
- Auto numbers are not available here.
- Roll-Up Summary fields are not available for mapping lead fields of converted fields.
- We can have a maximum of 25 rollup summary fields per master object.
- Functions used in roll up summary.
 - Count : It calculates the total number of related records.
 - Sum : It totals the values of selected fields.
 - Min : Displays lowest value
 - Max : Displays the highest value.

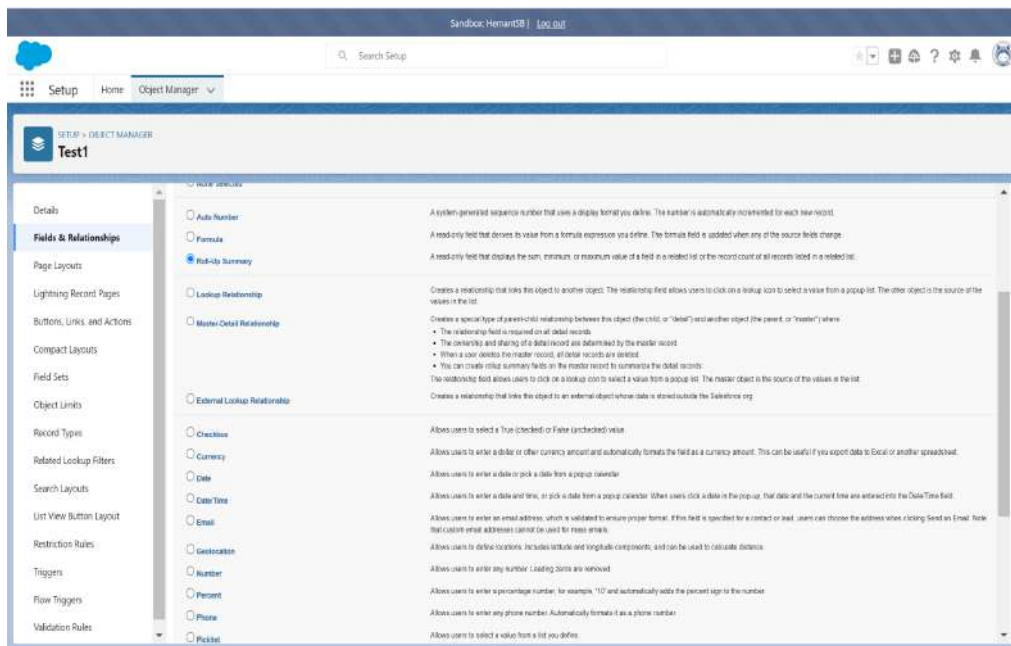


Then First Create Fields in Child object of any type and then create a formula field in object as an example to create : let suppose **Total SUM** and input a values



And after that Go to previous object i.e **Parent object** and make a **Roll-up-summary** field in that as:

1. Click the Object Manager tab
2. In object Manager Go to Field & Relationship
3. Click on New
4. Choose The Data type **Roll-up-summary** and click on Next



5. Enter Field label and Field Name and Click On **Next** , and **Summarize objects with object Next** and **select roll up type** and field aggregate to that

field in another object **and Save.**

This screenshot shows the 'New Custom Field' wizard in Salesforce Setup, specifically Step 2: Enter the details. The left sidebar lists navigation options under 'Fields & Relationships'. The main content area has a 'Field Label' of 'Total Marks' and a 'Field Name' of 'Total_Marks'. There is a 'Description' field and a 'Help Text' field. At the bottom, there is a checkbox labeled 'Add this field to existing custom report types that contain this entity' which is checked. Navigation buttons 'Previous', 'Next', and 'Cancel' are visible at the top right and bottom right of the form.

This screenshot shows the 'New Custom Field' wizard in Salesforce Setup, specifically Step 3: Define the summary calculation. The left sidebar is the same as the previous screenshot. The main content area shows 'Select Object to Summarize' with 'Master Object' as 'Test1' and 'Summarized Object' as 'Testtabcs'. Under 'Select Roll-Up Type', the 'SUM' option is selected, and 'Field to Aggregate' is 'Total Sum'. The 'Filter Criteria' section has two radio buttons: 'All records should be included in the calculation' (selected) and 'Only records meeting certain criteria should be included in the calculation'. Navigation buttons 'Previous', 'Next', and 'Cancel' are visible at the top right and bottom right of the form.

6. It will look like This in Records :

The screenshot shows a Salesforce interface with a navigation bar at the top containing 'Sales', 'Home', 'Invoices', 'Accounts', 'Reports', 'Expenses', 'People', 'Profiles Shared', 'Test, 1', and 'Testabcs'. The main content area displays a record for 'Test 1' with a score of 121. The record details include:

- Gender Picklist: [dropdown]
- URL: <https://www.salesforce.com/>
- Total Marks: 340.00
- Created By: Hemant Duggal, 11/07/2023, 7:28 pm
- Last Modified By: Hemant Duggal, 11/07/2023, 7:28 pm

LOOK Up 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.

→ Lookup relationship:-

- In this, objects are loosely coupled.
- When a parent's record gets deleted, the child remains in existence.
- We cannot create a roll-up summary field in a lookup relationship.
- Parent and child records have their own sharing and security settings in look-up relationships.
- The Lookup relationship field is not mandatory by default but we can select a checkbox to make it mandatory in lightning.
- We can have a maximum of 40 lookup per object.
- To convert a master-detail to look-up we have to check that there is no roll-up summary field available and can convert a look-up to master-detail if the lookup field in all records contains a value.

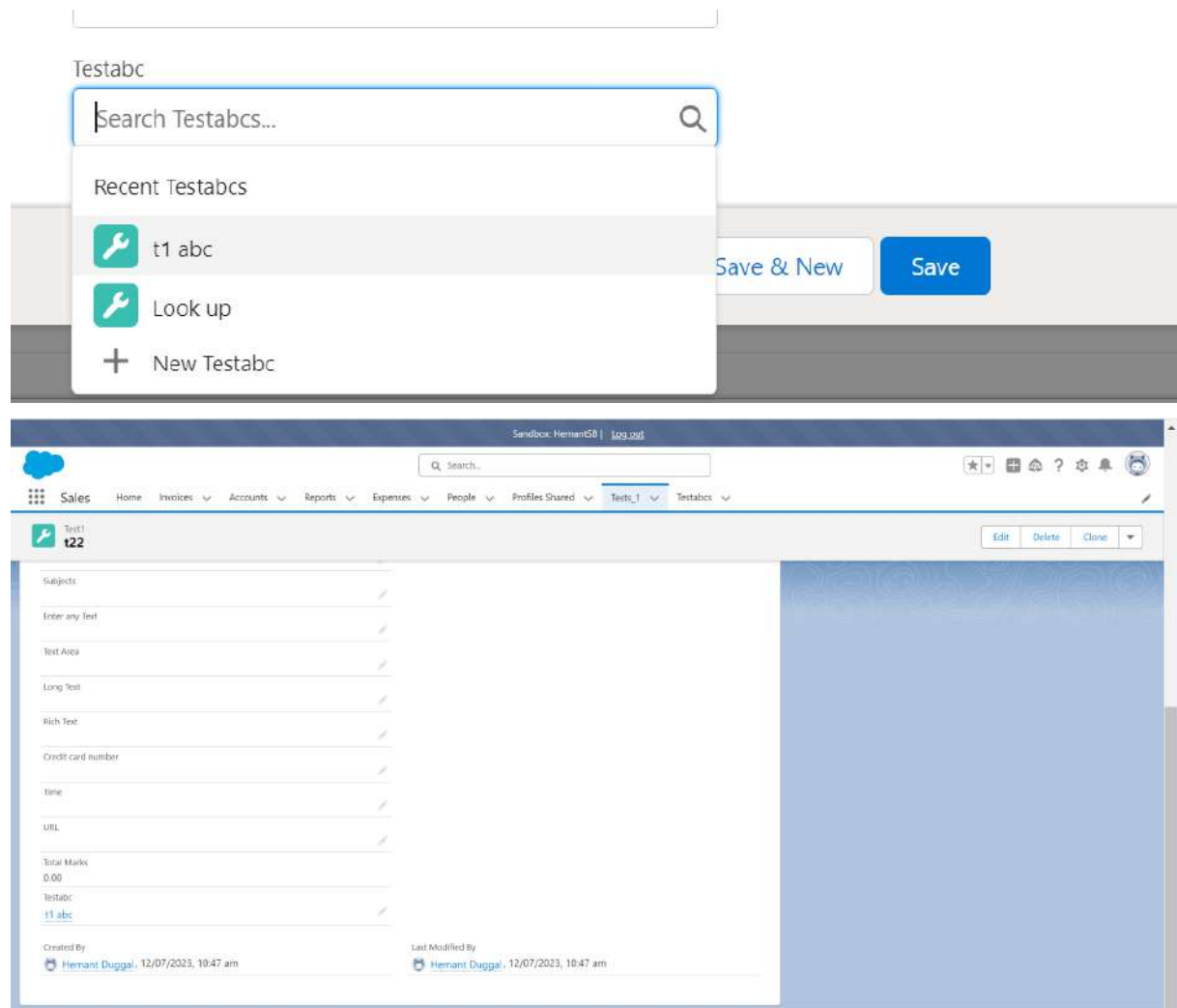
1. Click the **Object Manager** tab
2. In object Manager Go to Field & Relationship
3. Click on New
4. Choose The Data type **Look Up** and click on **Next**

The screenshot shows the Salesforce Object Manager interface. The left sidebar contains a navigation menu with options like 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, Triggers, Flow Triggers, and Validation Rules. The main content area is titled 'Test1' and 'New Custom Field'. It shows 'Step 1: Choose the field type' with a 'Next' button. Below this, it says 'Specify the type of information that the custom field will contain.' There is a 'Data Type' section with several options: 'None Selected' (selected), 'Auto Number', 'Formula', 'Roll-Up Summary', 'Lookup Relationship' (highlighted with a blue bar), 'Master-Detail Relationship', 'External Lookup Relationship', 'Checkbox', and 'Picklist'. Each option has a brief description of its functionality.

5. Enter Field label and Field Name and **Relate to** Click On Next , Next and Save.

The screenshot shows the Salesforce Object Manager interface. The left sidebar is the same as the previous screenshot. The main content area is titled 'Test1' and 'New Relationship'. It shows 'Step 2: Choose the related object' with a 'Next' button. Below this, it says 'Select the other object to which this object is related.' There is a 'Related To' dropdown menu with 'Testobject' selected. At the bottom right, there are 'Previous', 'Next', and 'Cancel' buttons.

6. It will look like This in Records :



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 detailed 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:-

- This relationship acts as a parent-child relationship. We use this type of relationship when we want to bound two objects closely dependent on each other.
- Master detail relationship field is mandatory to be filled. it cannot be empty.
- When a master record gets deleted, its related child/detail record automatically gets deleted.
- We can have a maximum of 2 master/detail relationships per object.
- The master object is the source of the values in the list.
- The parent record controls the behavior of the child record regarding visibility and sharing. It means the security setting of a parent object applies to the child object.
- When there is a master-detail relationship between two objects, you can create a unique type of field over the master object, called Roll-up summary. A roll-up summary field allows us to calculate values from child records, such as the number of child records linked to a parent record.

1. Click the **Object Manager** tab
2. In object Manager Go to Field & Relationship
3. Click on **New**
4. Choose The Data type **Master Detail** and click on **Next**

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

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

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

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

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

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

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

5. Enter Field label and Field Name and **Related** to and a Related list label and Click On **Next** , **Next** and **Save**.

Sandbox: Hemant58 | [Log out](#)

Setup Home Object Manager

Testabc

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

Triggers

Flow Triggers

Validation Rules

Edit Testabc Custom Field

Test1

Custom Field Definition Edit

Field Information

Field Label: Test1

Field Name: Test1

Description:

Help Text:

Data Owner: User

Field Usage: --None--

Date Sensitivity Level: --None--

Compliance Categorization:

Available: PII, HIPAA, GDPR, PCI

Chosen:

Master-Detail Options

Related To: Test1

Child Relationship Name: Testabc

Related List Label: Testabc

Sharing Setting: ☐ Read Only: Allow users with at least Read access to the Master record to create, edit, or delete related Detail records.

6. It will look like This in Records :

t1 abc

Test1

t21

english

100

maths

90

Physics

80

Chemistry

70

Total Sum

340.00

Created By: Hemant Duggal, 12/07/2023, 10:35 am

Last Modified By: Hemant Duggal, 12/07/2023, 10:35 am

Activity

Filters: All time • All activities • All types

Refresh • Expand All • View All

Upcoming & Overdue

No activities to show.

Get started by sending an email, scheduling a task, and more.

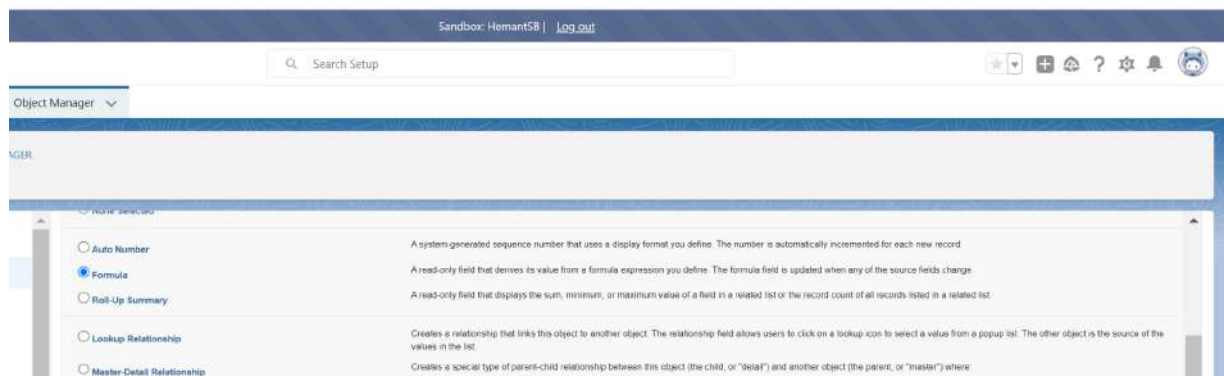
No past activity: Past meetings and tasks marked as done show up here.

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.

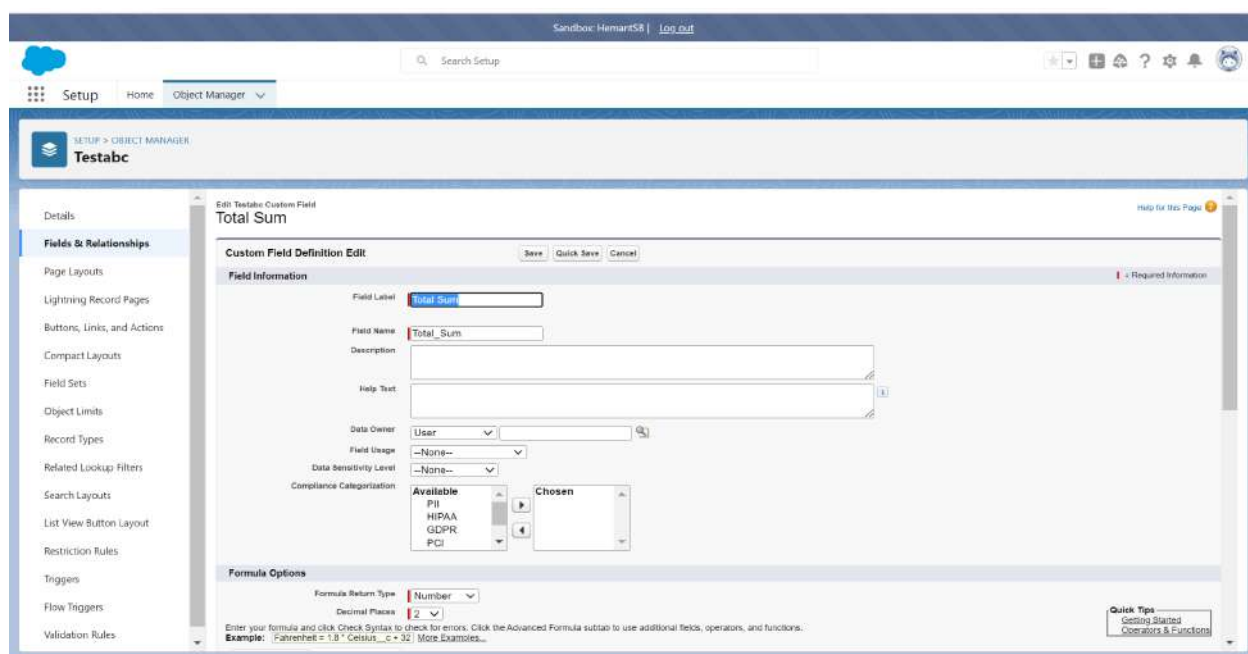
- This is the read only field whose value is derived from expression.
- It is used to display some calculated values.
- We cannot edit values of formula fields.
- It is automatically updated once the field involved in the formula changes its values.
- Values of formula fields depend on other fields.

Let us Understand With The Simplest Example :

1. Click the **Object Manager** tab
2. In object Manager Go to Field & Relationship
3. Click on **New**
4. Choose The Data type **Formula** and click on **Next**



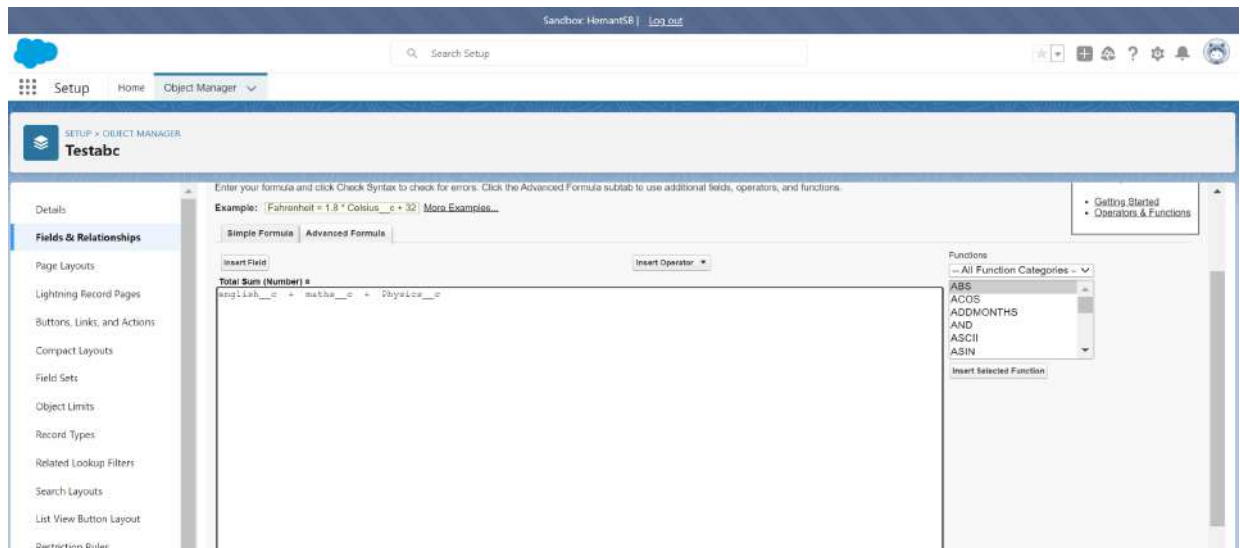
5. Enter **Field label and Field Name**



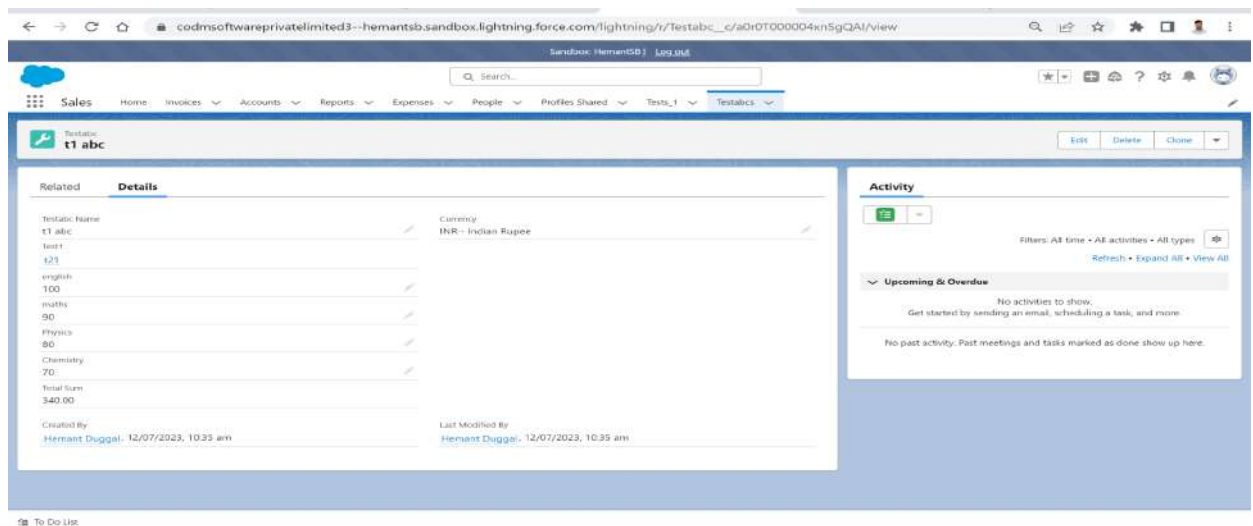
6. Select any Formula Return Type Suppose AS **Number**

7. Select **Formula Editor** And insert Fields Operators And A Function For That

8. Click On **Check Syntax** and Click On **Next , Next** and **Save**.

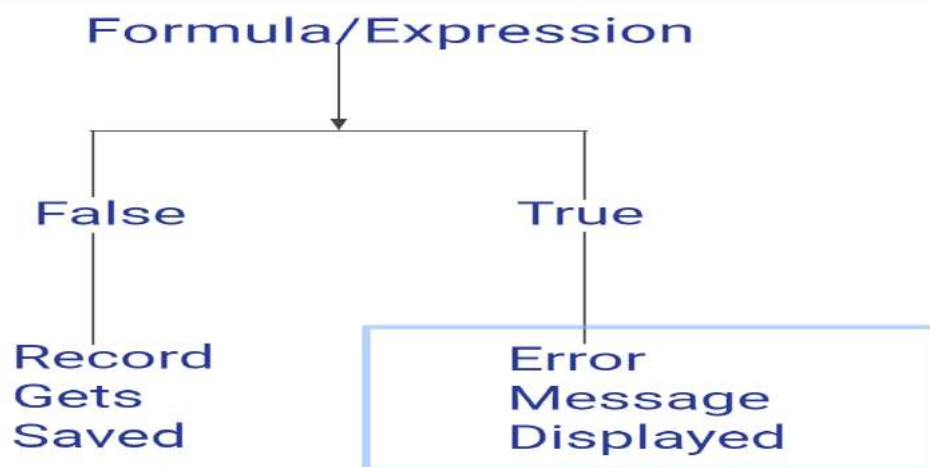


9. It will look like This in Records :



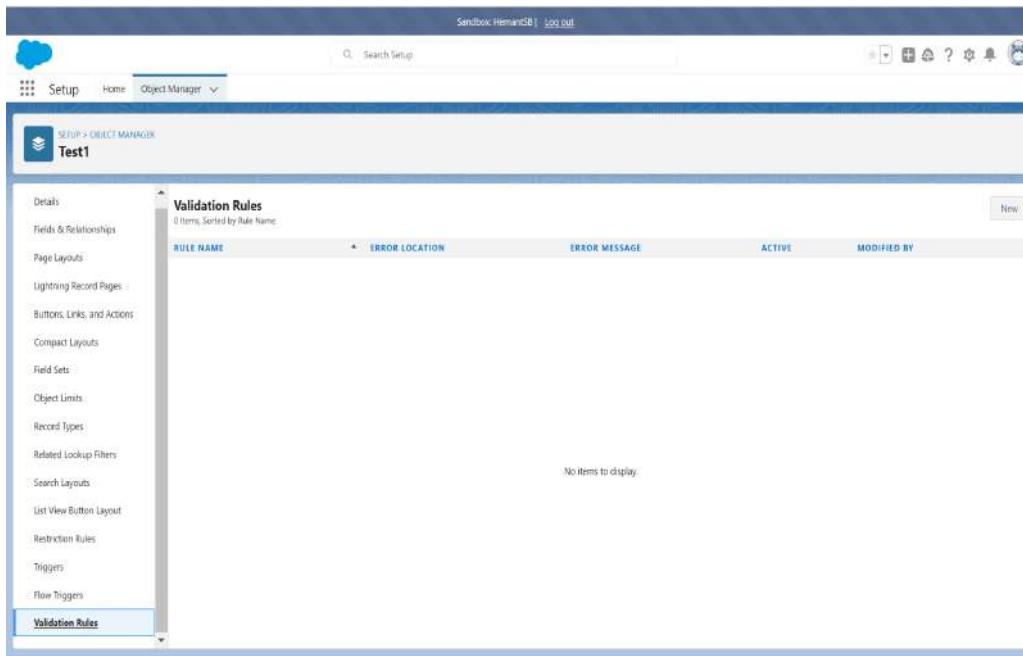
Validation Rules : Validation rules verify that data entered by users in records meets the standards you specify before they can save it. A validation rule can contain a formula or expression that evaluates the data in one or more fields and returns a value of “True” or “False.”

- It involves two steps:
 - error condition(Formula/Expression)
 - error message
 - can be displayed on top of the page.
 - can be displayed in front of any field.
- It also maintains the data quality.
- Avoid storing unnecessary data.
- One way of making a field mandatory.

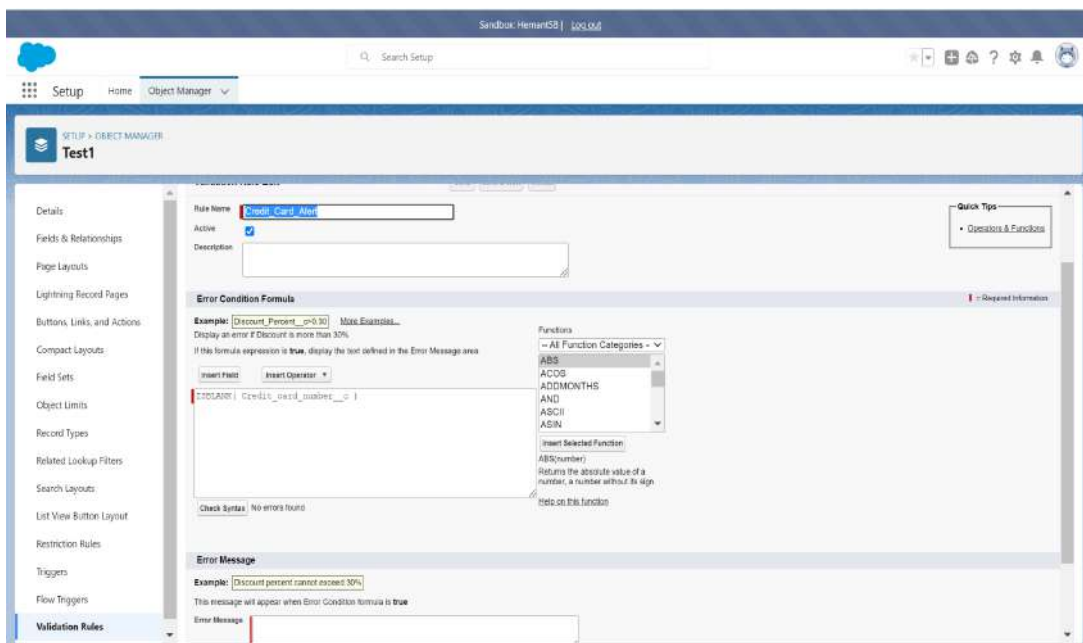


Steps To create Validation Rules :

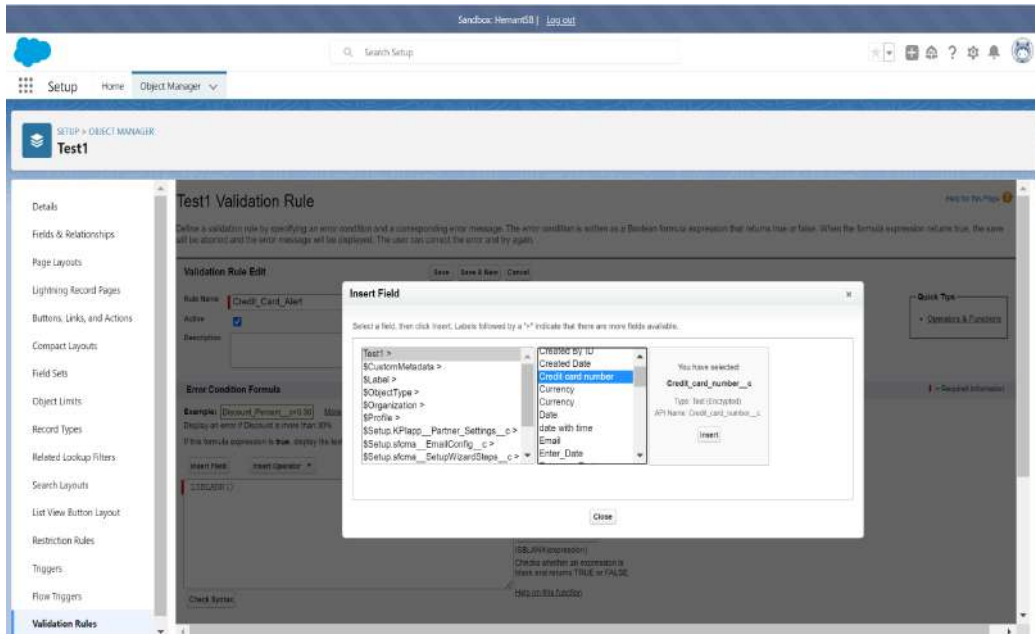
- Click the **Object Manager** tab
- In object Manager Go to **Validation Rules**



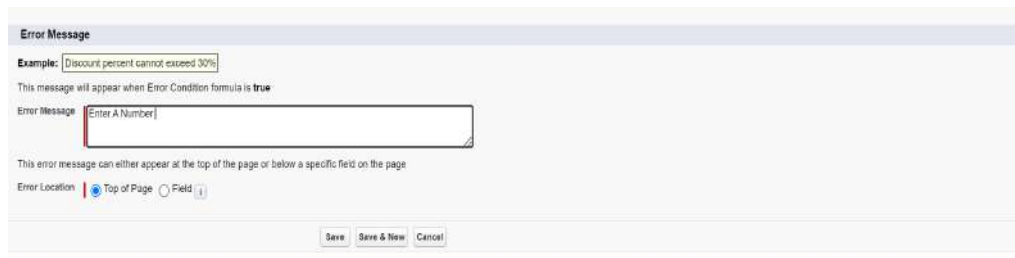
- Click on **New**
- Enter **Rule Name** And Click On Active Checkbox Button



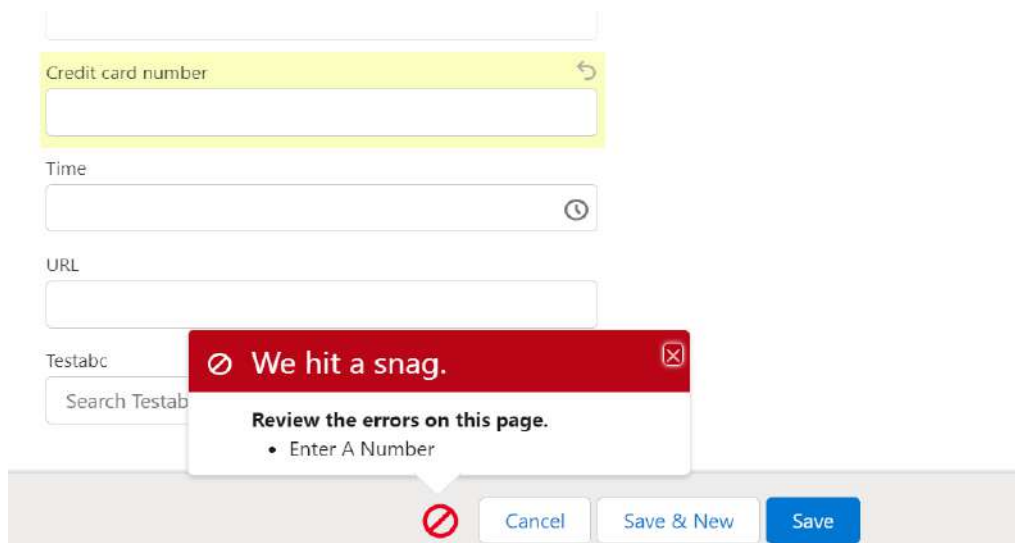
- Enter A Validation Rule



- Enter A Error Message And Error Location And Click On Next, Next And Save

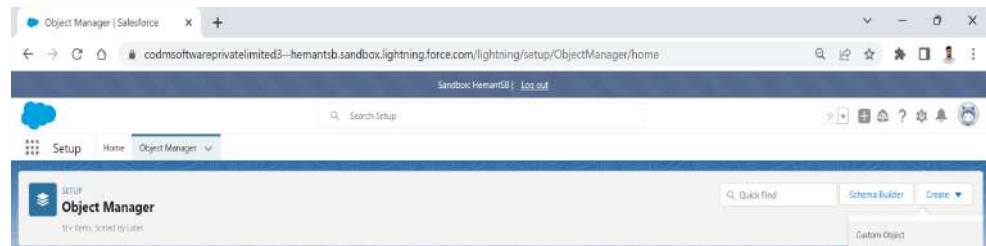


- Let Us Understand With The Example Of not inputting A value To credit card field
- We will get this Error :

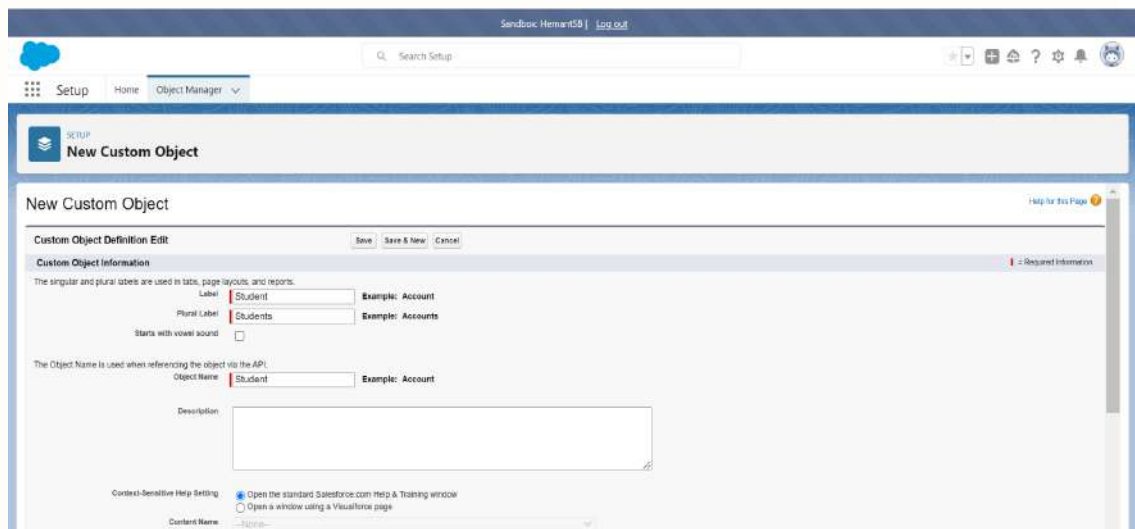


Example Covering Mostly Questions / Topics :

1. In your Salesforce org/sandbox , click the cog icon, and select **Setup**.
2. Click the **Object Manager** tab.
3. Click **Create > Custom Object** in the top-right corner.

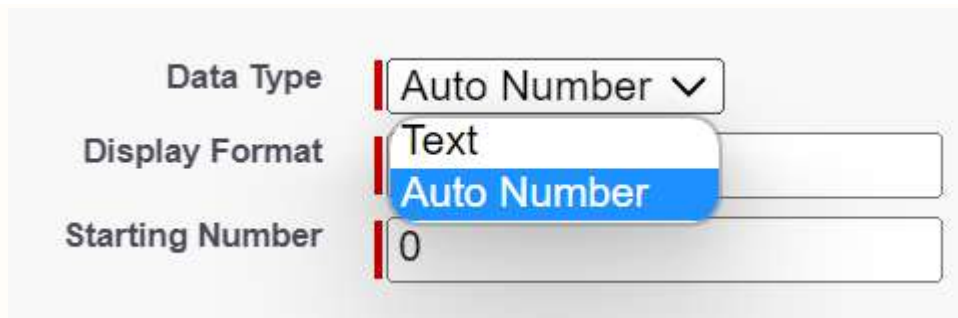


4. In the *Label* section, enter whatever you want to call your custom object. The Label and A plural Label **Example : Student , Object Name** and **Record Name** fields will auto-fill with the same name.



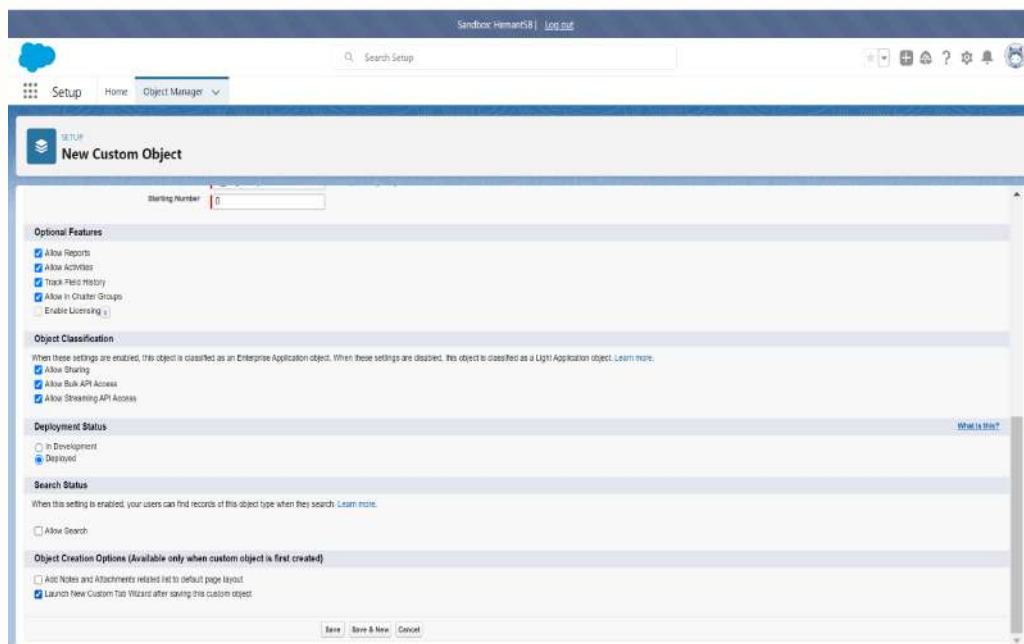
5. Enter Data Type Whether It is **Auto Number And Text** in my **Example :**

I have taken Student ID As Auto Number and display format as : S_id-{0000} and a starting number as 0.



The screenshot shows the 'New Custom Object' setup page in Salesforce. On the left, there are three labels: 'Data Type', 'Display Format', and 'Starting Number'. To the right of these labels are three input fields. The 'Data Type' field is a dropdown menu with 'Auto Number' selected. The 'Display Format' field is a text input with 'Text' entered. The 'Starting Number' field is a text input with '0' entered. A blue highlight is visible over the 'Auto Number' option in the dropdown menu.

6. ENABLE THIS OPTIONAL FEATURES IF YOU WANT TO :

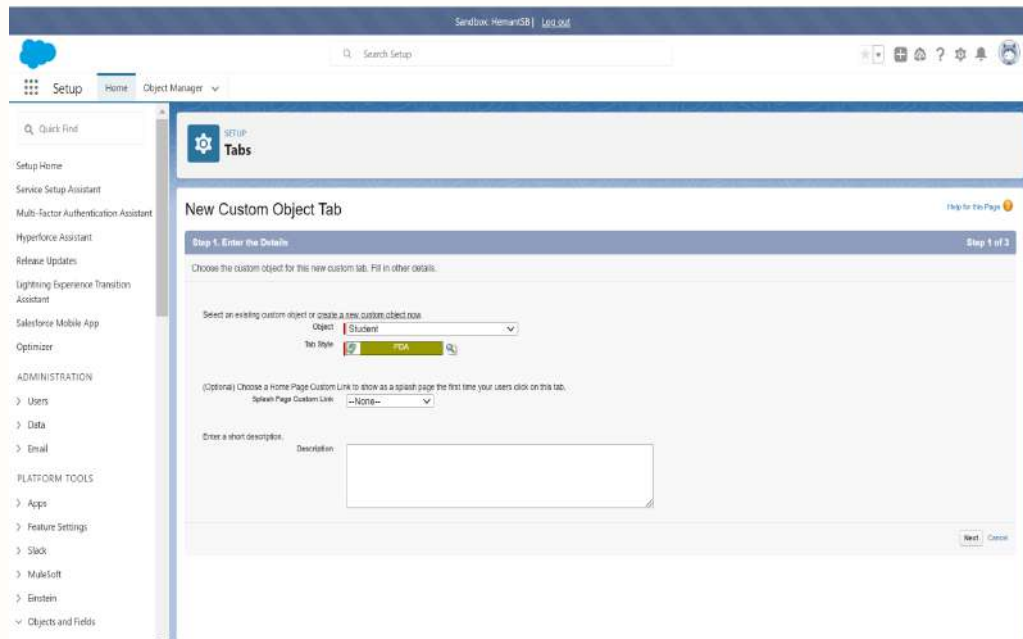


The screenshot shows the 'New Custom Object' setup page in Salesforce. The 'Optional Features' section is expanded, showing several checkboxes. The 'Allow Reports' checkbox is checked. The 'Allow Archival' checkbox is checked. The 'Track Field History' checkbox is checked. The 'Allow in Chatter Groups' checkbox is checked. The 'Enable Licensing' checkbox is unchecked. Below the 'Optional Features' section, there are sections for 'Object Classification', 'Deployment Status', 'Search Status', and 'Object Creation Options'. The 'Deployment Status' section has 'In Development' selected. The 'Search Status' section has 'Allow Search' selected. The 'Object Creation Options' section has 'Launch New Custom Tab Wizard after saving this custom object' selected. At the bottom of the page, there are buttons for 'Save', 'Save & New', and 'Cancel'.

7. Scroll to the bottom of the page, and select the **checkbox** Launch Custom Tab Wizard after saving this custom object. Selecting this box will add your custom object as a tab in Salesforce.

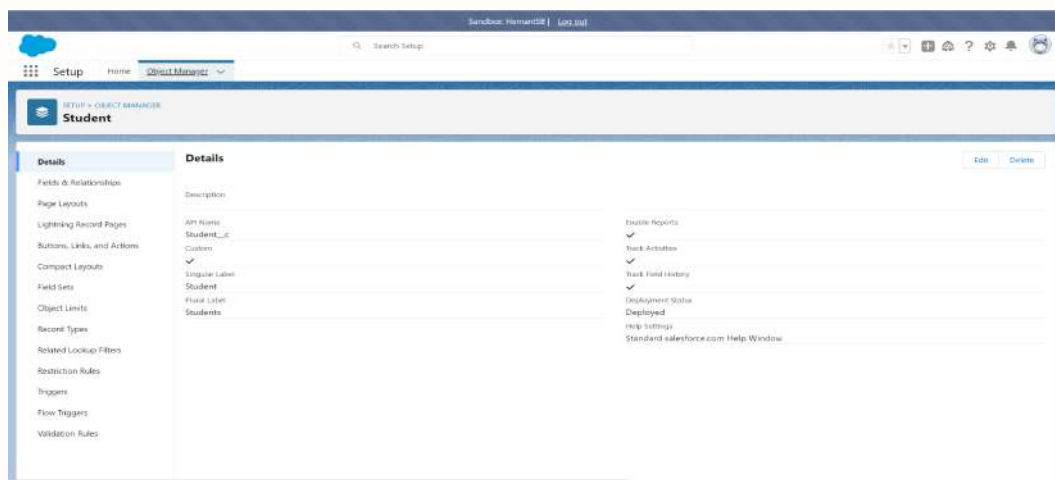
8. Click **Save**.

On the *New Custom Object Tab* page, click the **Tab Style** field, and choose a style. The style sets the icon to display in the UI for the object.



9. Click **Next**, **Next**, and **Save**.

In Object Manager it will appear like this :

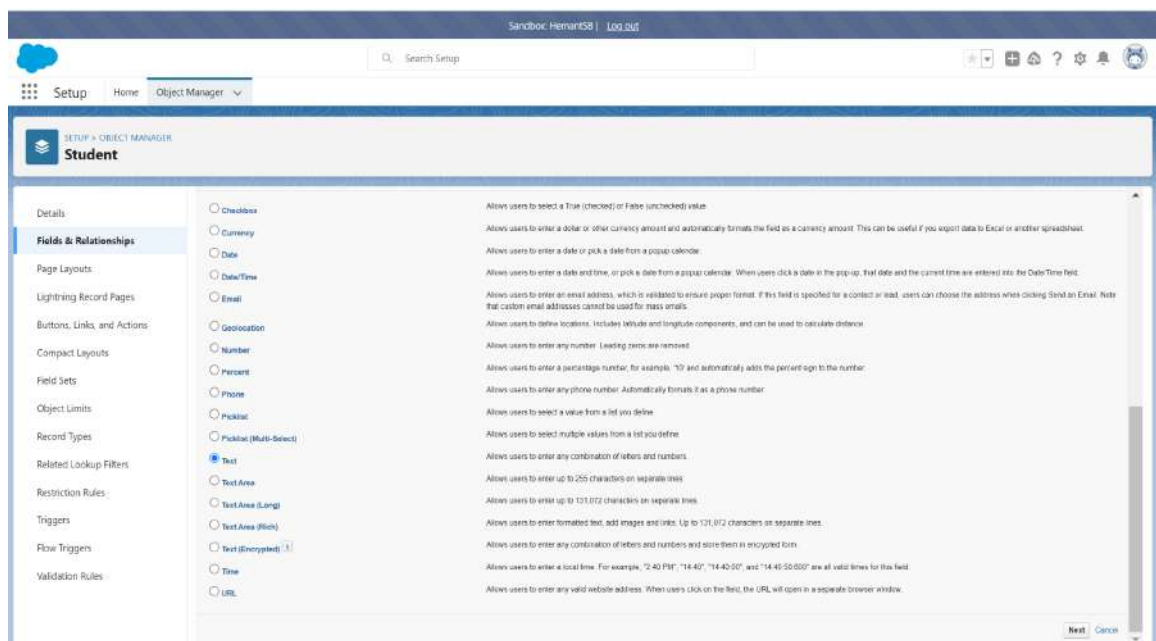


Steps to create a custom field :

1. Click the **Object Manager** tab
2. In object Manager Go to Field & Relationship And Click On New



3. Next, choose a data type. Choosing a data type helps you format the field input. **For example**, if you create a field with the **Text** and click on Next .



4. In new Custom Fields fill out the Field Label, Field Name, Length and click **Next**.

Setup > OBJECT MANAGER > Student

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Triggers

Flow Triggers

Validation Rules

Step 2: Enter the details

Field Label: Name

Length: 20

Field Name: Name

Description:

Help Text:

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

Unique: ☐ Do not allow duplicate values

External ID: ☐ Use 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

Use formulas, picklist, checkbox, text, and picklist value API names in double quotes ("the_api"). Include numbers without quotes (20). Show percentages as decimals (0.15), and express date calculations in the standard format: {field} + "Y" to determine a date from a custom timestamp and year, or {field} + "M" to determine a date from a custom timestamp and month.

5. Click Next, Next . Then click Save.

Setup > OBJECT MANAGER > Student

Details

Fields & Relationships

6 items, sorted by Field Label

Q, Quick Find

New Deleted Fields Field Dependencies Set History Tracking

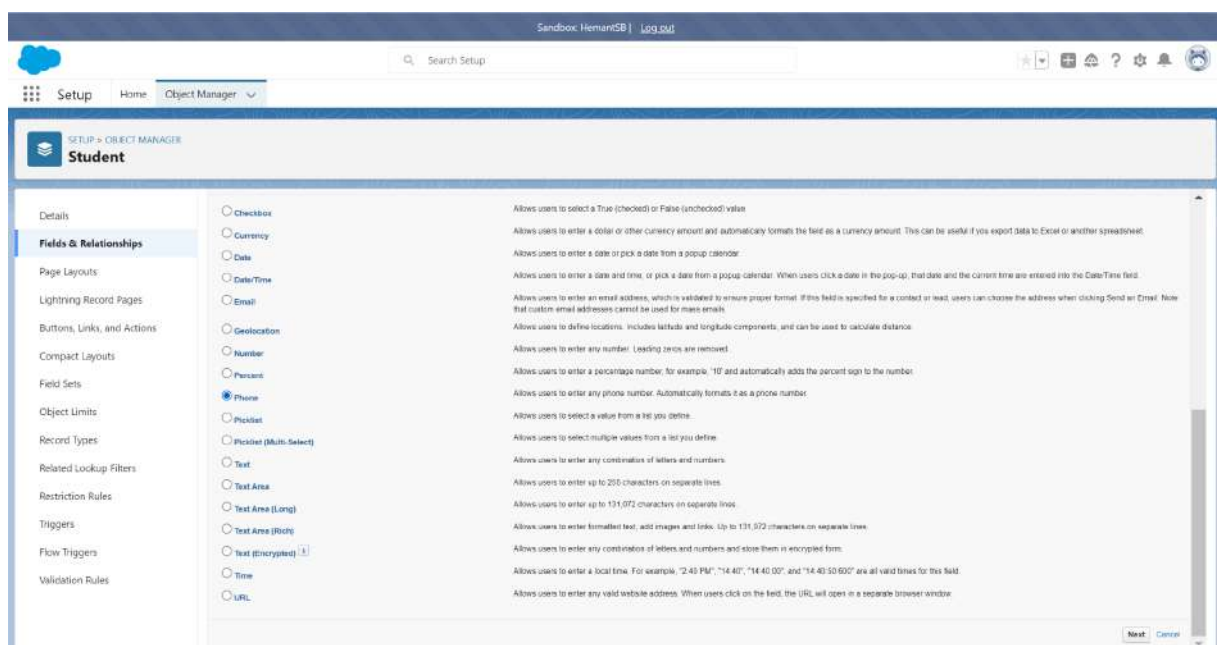
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Currency	CurrencyIsoCode	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name__c	Text(20)		

Now Next Field :

1. Click the **Object Manager** tab
2. In object Manager Go to Field & Relationship And Click On New



3. Next, choose a data type. Choosing a data type helps you format the field input. **For example**, if you create a field with the **Phone** and click on Next .



6. In new Custom Fields fill out the Field Label, Field Name and click **Next**.

The screenshot shows the 'Edit Student Custom Field' page for the 'Phone' field. The 'Field Information' section is active, showing the 'Field Label' as 'Phone' and the 'Field Name' as 'Phone'. The 'Data Type' is set to 'Phone'. The 'Data Owner' is 'User'. The 'Field Usage' is 'None'. The 'Data Sensitivity Level' is 'None'. The 'Compliance Categorization' section shows a list of categories: PII, HIPAA, GDPR, and FCI. The 'General Options' section has a checkbox for 'Required' which is unchecked, and a checkbox for 'Always require a value in this field in order to save a record' which is also unchecked. The 'Default Value' is set to 'Show Formula Editor'.

7. Click Next, Next . Then click Save.

The screenshot shows the 'Fields & Relationships' section for the 'Student' object. The table lists the following fields:

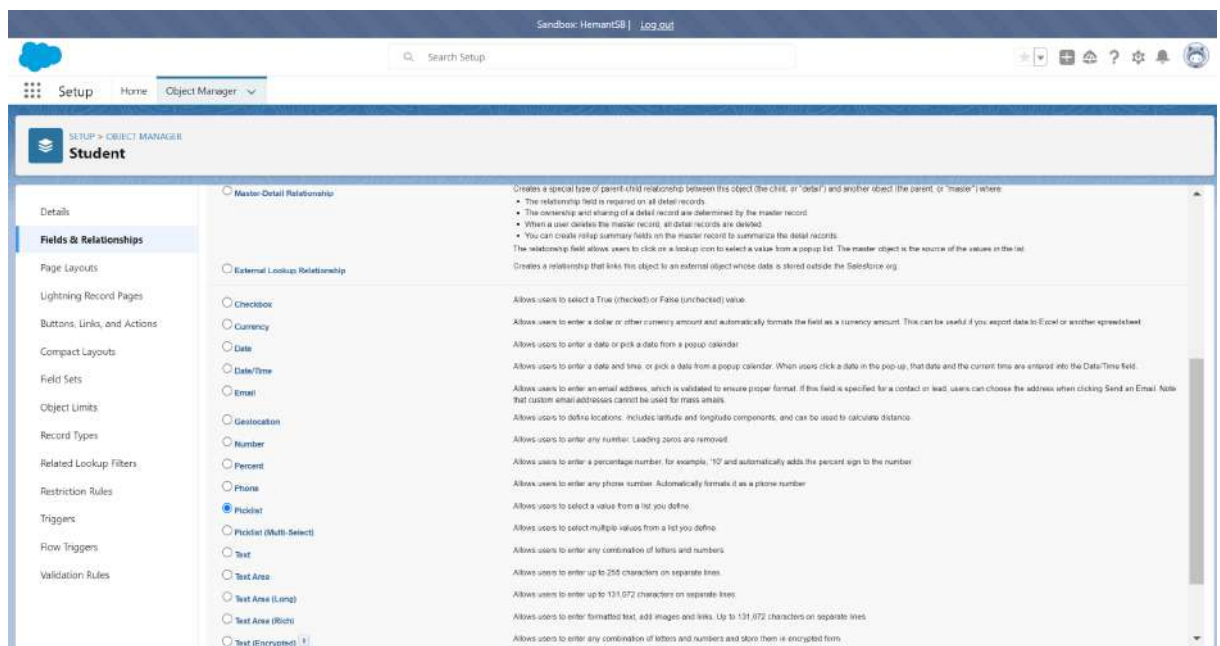
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Currency	CurrencyIsoCode	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name__c	Text(20)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone	Phone__c	Phone		

Now Next Field :

1. Click the **Object Manager** tab
2. In object Manager Go to Field & Relationship And Click On New



3. Next, choose a data type. Choosing a data type helps you format the field input. **For example**, if you create a field with the **Picklist** and click on Next .



4. In new Custom Fields fill out the Field Label, Field Name Values Like **A, B** and click **Next**.

The screenshot shows the Salesforce Setup interface for the 'Student' object. The 'Fields & Relationships' section is active. The 'Field Label' is 'Class'. The 'Values' section is set to 'Enter values, with each value separated by a new line', with a text area containing 'A' and 'B'. The 'Field Name' is 'Class'. The 'Description' is empty. The 'Help Text' is empty. The 'Required' checkbox is unchecked. The 'Auto add to custom report type' checkbox is checked. The 'Default Value' is 'Show Formula Editor'.

8. Click Next, Next . Then click Save.

The screenshot shows the Salesforce Setup interface for the 'Student' object. The 'Fields & Relationships' section is active. The table below shows the list of fields.

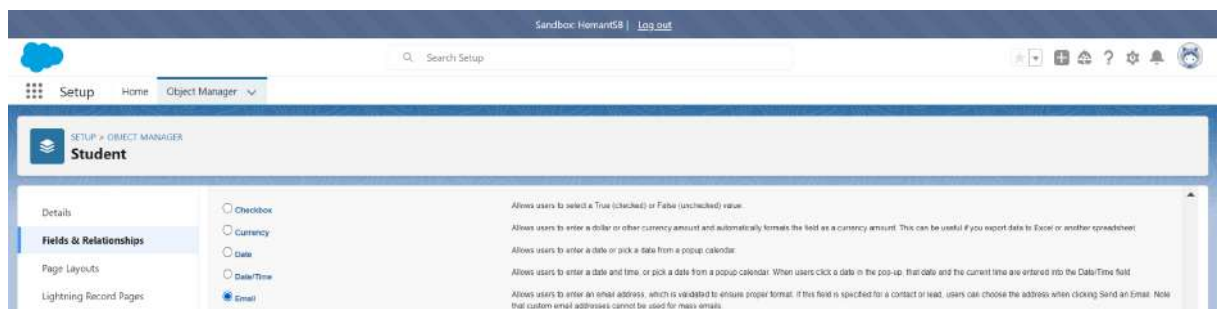
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Class	Class_c	Picklist		

Now Next Field :

1. Click the **Object Manager** tab
2. In object Manager Go to Field & Relationship And Click On New



3. Next, choose a data type. Choosing a data type helps you format the field input. **For example**, if you create a field with the **Email** and click on Next .



4. In new Custom Fields fill out the Field Label, Field Name and click **Next**.

Sandbox: HermanISB | Log out

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Student New Custom Field

Step 2 of 4: Enter the details

Field Label: Email

Field Name: Email

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 resource 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

Use formula syntax. Enclose text and picklist value API names in double quotes. (This text includes numbers without quotes. (S) show percentages as decimals (0.10), and express date calculations in the standard format. (Today + 7) is reference a field from a Custom Visuals type record use: <CustomVisualsType__rfd.RecordNameField__c

Previous Next Cancel

9. Click Next, Next . Then click Save.

Sandbox: HermanISB | Log out

Search Setup

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9 Items, Sorted by Field Label

Quick Find

New Deleted Fields Field Dependencies Set History Tracking

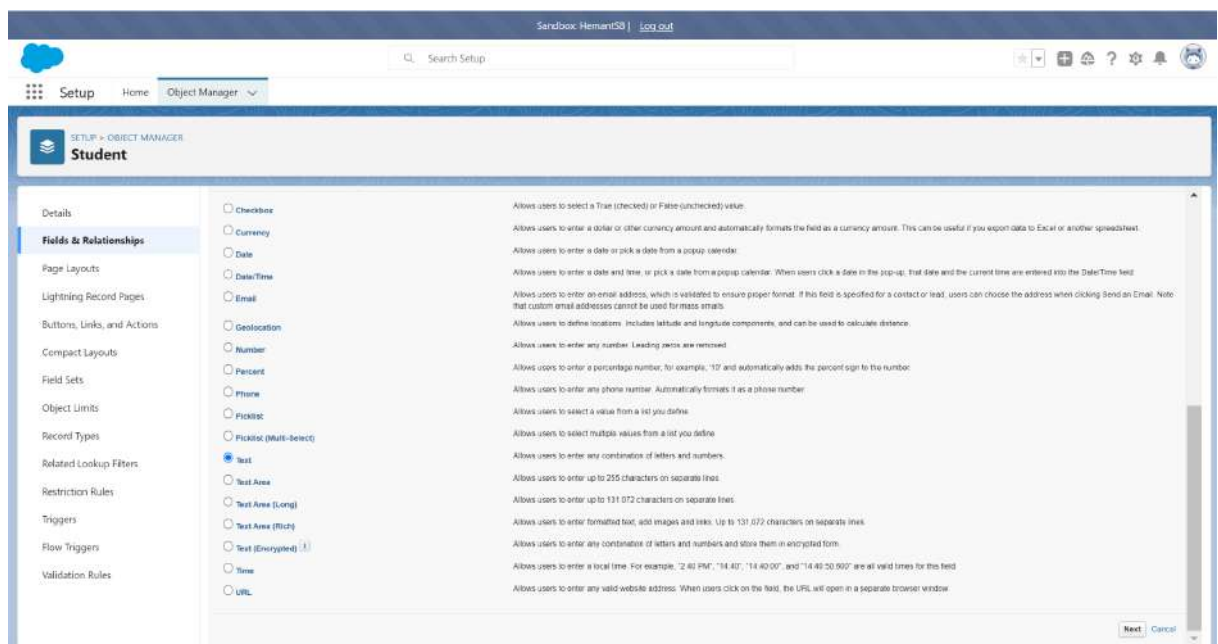
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Class	Class__c	Picklist		
Created By	CreatedById	Lookup(User)		
Currency	CurrencyIsoCode	Picklist		
Email	Email__c	Email		

Now Next Field :

1. Click the **Object Manager** tab
2. In object Manager Go to Field & Relationship And Click On New



3. Next, choose a data type. Choosing a data type helps you format the field input. **For example**, if you create a field with the **Text** and click on Next .



5. In new Custom Fields fill out the Field Label, Field Name And Length and click **Next**.

Sandbox: Hermit58 | Log out

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Step 2: Enter the details

Step 2 of 4

Field Label: Course

Length: 10

Field Name: Course

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

Default Value: Show Formula Editor

Use formula editor: Enter text and picklist values. If double quotes (" "), single quotes (' '), or special characters are used, they must be escaped with a backslash (\). For example, to enter a date, use "2013-01-01". To enter a time, use "12:00:00". To enter a percentage, use "50%". To enter a number, use "123.45". To enter a text value, use "ABC". To enter a picklist value, use the value as it appears in the picklist. To enter a formula, use the formula as it appears in the formula bar. To enter a formula result, use the formula result as it appears in the formula bar.

10. Click **Next, Next** . Then click **Save**.

Sandbox: Hermit58 | Log out

Setup Home Object Manager

Student

Details

Fields & Relationships

10 Items, Sorted by Field Label

Quick Find

New Deleted Fields Field Dependencies Set History Tracking

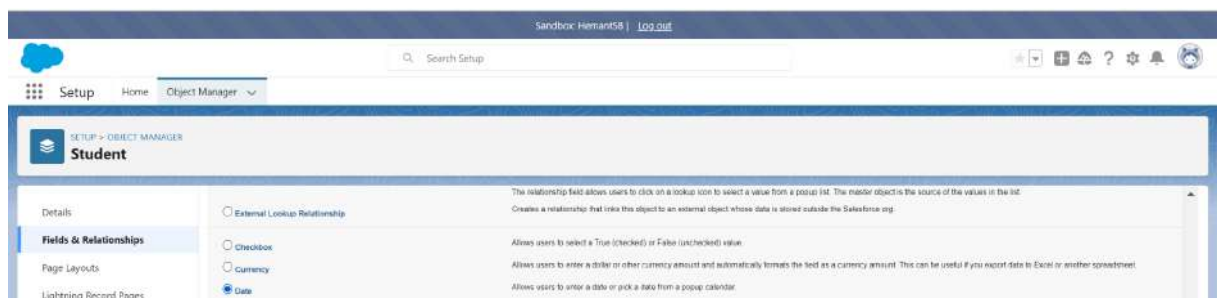
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Class	Class__c	Picklist		
Course	Course__c	Text(10)		

Now Next Field :

1. Click the **Object Manager** tab
2. In object Manager Go to Field & Relationship And Click On New



3. Next, choose a data type. Choosing a data type helps you format the field input. **For example**, if you create a field with the **Date** **For My example D.O.B** and click on Next .



4. In new Custom Fields fill out the Field Label, Field Name and click **Next**.

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Step 2: Enter the details

Field Label: D.O.B

Field Name: D.O.B

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. Choose the field and provide value API names in double quotes. The [date] includes numbers without quotes. [date] when you trigger validation. [2/10] and complex date calculations in the standard format. [date] * 10. To reference a field from a custom relationship type, use: [CustomRelationshipType__r].[CustomField__c]

Previous Next Cancel

5. Click **Next**, **Next** . Then click **Save**.

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11 Items, Sorted by Field Label

Q Quick Find New Deleted Fields Field Dependencies Self History Tracking

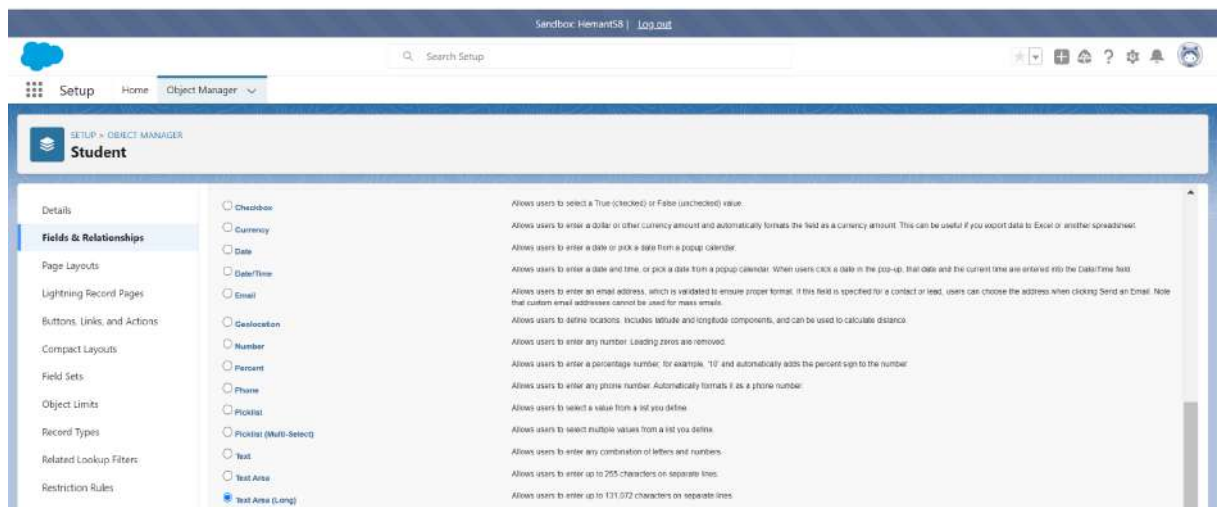
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Class	Class__c	Picklist		
Course	Course__c	Text(10)		
Created By	CreatedById	Lookup(User)		
Currency	CurrencyIsoCode	Picklist		
D.O.B	D_O_B__c	Date		

Now Next Field :

1. Click the **Object Manager** tab
2. In object Manager Go to Field & Relationship And Click On New



3. Next, choose a data type. Choosing a data type helps you format the field input. **For example**, if you create a field with the **Text Area Long** and click on Next .



4. In new Custom Fields fill out the Field Label, Field Name , Visible Lines And Length and click **Next**.

Sandbox: Hermit5B | [Log Out](#)

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Student
New Custom Field

Help for this Page

Step 2 of 4

PREVIOUS NEXT CANCEL

Field Label Address

Length 32,768
(Max 131,072)

Visible Lines 3

Field Name Address

Description

Help Text

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

5. Click **Next**, **Next** . Then click **Save**.

Sandbox: Hermit5B | [Log Out](#)

Setup Home Object Manager

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12 Items, Sorted by Field Label

Q, Quick Find New Deleted Fields Field Dependencies Set History Tracking

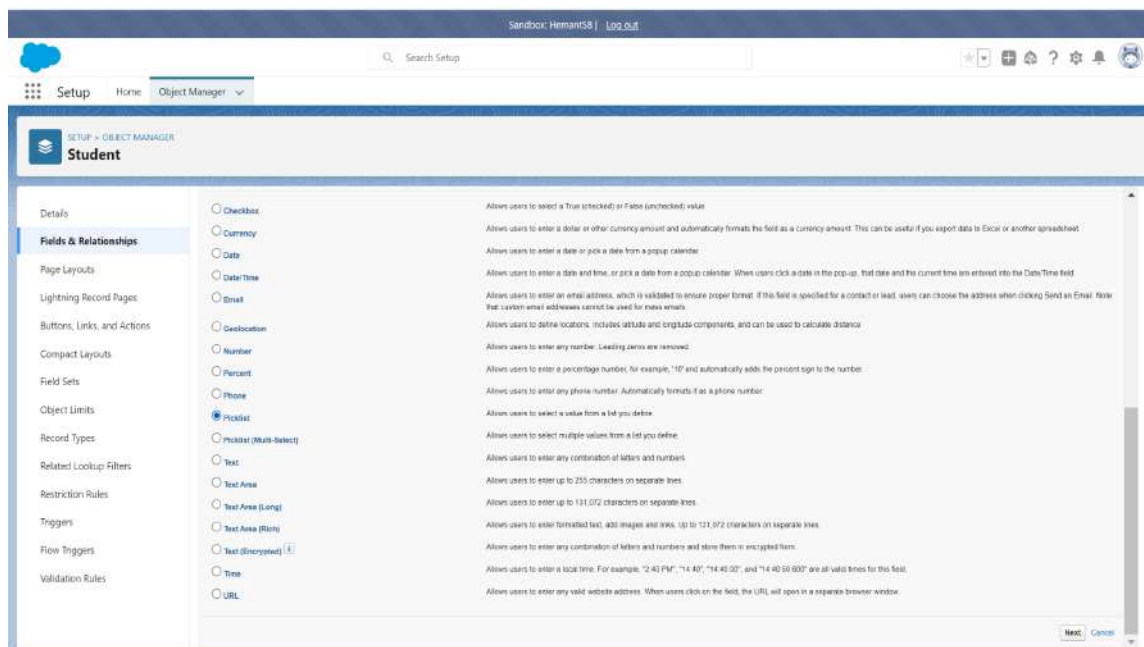
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address_c	Long Text Area(32768)		

Now Next Field :

1. Click the **Object Manager** tab
2. In object Manager Go to Field & Relationship And Click On New



3. Next, choose a data type. Choosing a data type helps you format the field input. **For example**, if you create a field with the **Picklist** and click on Next .



4. In new Custom Fields fill out the Field Label, Field Name , **Values Like Male , Female** and click **Next**.

Setup > OBJECT MANAGER
Student

Step 2: Enter the details

Field Label: Gender?

Values: ☐ Use global picklist value set
☒ Enter values, with each value separated by a new line

Male
Female

☐ 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:

5. Click **Next, Next** . Then click **Save**.

Setup > OBJECT MANAGER
Student

Fields & Relationships
13 Items, Sorted by Field Label

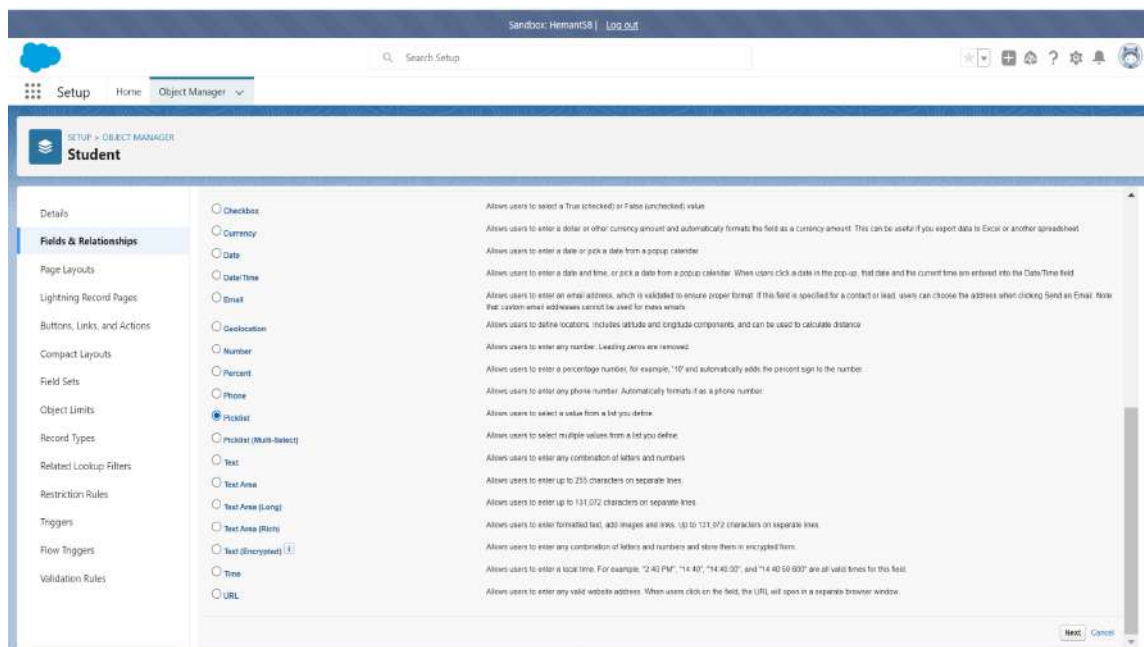
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address__c	Long Text Area(32768)		
Class	Class__c	Picklist		
Course	Course__c	Text(10)		
Created By	CreatedById	Lookup(User)		
Currency	CurrencyIsoCode	Picklist		
D.O.B	D_O_B__c	Date		
Email	Email__c	Email		
Gender?	Gender__c	Picklist		

Now Next Field :

1. Click the **Object Manager** tab
2. In object Manager Go to Field & Relationship And Click On New



3. Next, choose a data type. Choosing a data type helps you format the field input. **For example**, if you create a field with the **Picklist** and click on Next .



4. In new Custom Fields fill out the Field Label, Field Name , **Values Like Haryana , Delhi, U.P, Punjab** and click **Next**.

Sandbox: Hemant58 | Log out

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Student
New Custom Field

Step 2: Enter the details Step 2 of 4

Field Label: State

Values: ☐ Use global picklist value set ☒ Enter values, with each value separated by a new line

Haryana
Delhi
U.P
Punjab

☐ 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 Text:

Previous Next Cancel

5. Click **Next, Next** . Then click **Save**.

Sandbox: Hemant58 | Log out

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14 Items. Sorted by Field Label

Quick Find

New Deleted Fields Field Dependencies Set History Tracking

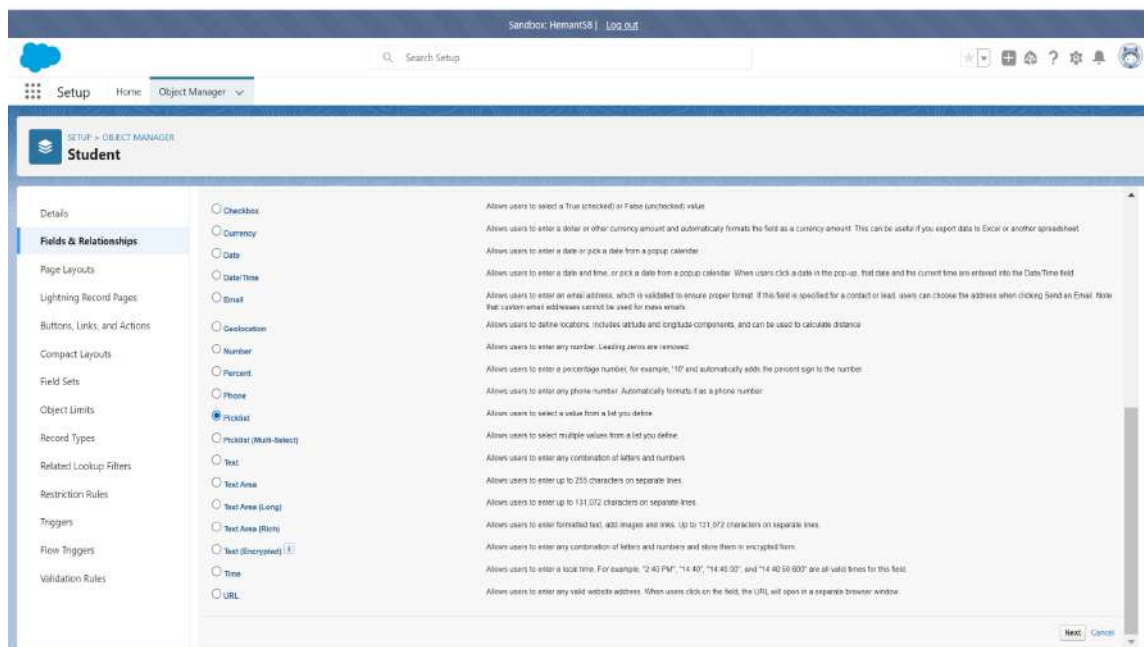
Course	Course__c	Text(10)
Created By	CreatedById	Lookup(User)
Currency	CurrencyIsoCode	Picklist
D.O.B	D_O_B__c	Date
Email	Email__c	Email
Gender?	Gender__c	Picklist
Last Modified By	LastModifiedById	Lookup(User)
Name	Name__c	Text(20)
Owner	OwnerId	Lookup(User,Group)
Phone	Phone__c	Phone
State	State__c	Picklist

Now Next Field :

1. Click the **Object Manager** tab
2. In object Manager Go to Field & Relationship And Click On New



3. Next, choose a data type. Choosing a data type helps you format the field input. **For example**, if you create a field with the **Picklist** and click on Next .



4. In new Custom Fields fill out the Field Label, Field Name , **Values Like** Tilak Nagar,Rohini,Nehru Place,Pitampura,PunjabiBagh,Noida,Meerut,Ghaziabad Greater Noida,Kanpur,Bulandseher,Faridabad,Gurgaon,Rohtak,Hisar,Sirsa Mansa,Amritsar,Barnala,Bathinda,Firozpur and click **Next**.

The screenshot shows the 'New Custom Field' page for the 'Student' object in Salesforce Setup. The page is titled 'Step 2, Enter the details' and 'Step 2 of 4'. The 'Field Label' is set to 'City'. The 'Values' section is set to 'Enter values, with each value separated by a new line', and a list of cities is entered: Tilak nagar, Rohini, Nehru place, Pitampura, Punjabi Bagh, Noida, Meerut. The 'Field Name' is set to 'City'. The 'Description' and 'Help Text' fields are empty.

5. Click **Next, Next** . Then click **Save**.

The screenshot shows the 'Fields & Relationships' page for the 'Student' object in Salesforce Setup. The page displays a table of fields with the following columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The table contains two rows of data.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address_c	Long Text Area(32768)		
City	City_c	Picklist		

Now Create A Formula In Age To Calculate AGE From D.O.B

Now Next Field :

1. Click the **Object Manager** tab
2. In object Manager Go to Field & Relationship And Click On New



3. Next, choose a data type. Choosing a data type helps you format the field input. **For example**, if you create a field with the **Formula** and click on Next .



4. In new Custom Fields fill out the Field Label, Field Name and click **on Formula Return Type**

Sandbox: Hermit58 | [Log out](#)

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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 Select one of the data types below.

☐ Checkbox Calculate a boolean value.
Example: `(TODAY() < CloseDate)`

☐ Currency Calculate a dollar or other currency amount and automatically format the field as a currency amount.
Example: `(Close_Margin * Amount / Cost__c)`

☐ Date Calculate a date, for example, by adding or subtracting days to other dates.
Example: `Reminder (Date + CloseDate - 7)`

☐ DateTime Calculate a datetime, for example, by adding a number of hours or days to another datetime.
Example: `Next = NOW() + 1`

☒ Number Calculate a numeric value.
Example: `Fahrenheit = 1.8 * Celsius__c + 32`

☐ Percent Calculate a percent and automatically add the percent sign to the number.
Example: `Discount = (Amount - Discounted_Amount__c) / Amount`

☐ Text Create a text string, for example, by concatenating other text fields.
Example: `Full Name = LastName & ", " & FirstName`

☐ Time Calculate a time, for example, by adding a number of hours to another time.
Example: `Next = TIMEVALUE(NOW()) + 1`

Options: **Decimal Places** Example: 090.00

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

5. Now Select **Number** In Type and click on Next.

6. Enter This In Your Formula Editor : `YEAR(TODAY()) - YEAR(DOB__c)`
as—

Sandbox: Hermit58 | [Log out](#)

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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**

Age (Number)

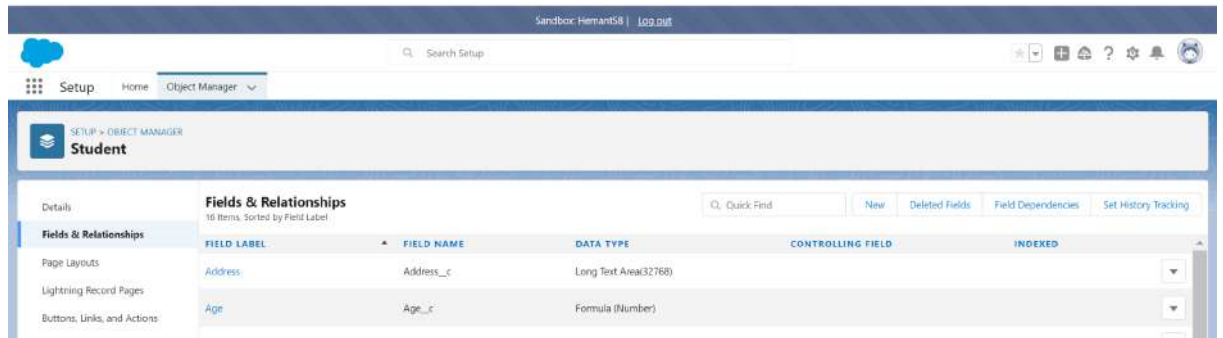
`YEAR(TODAY()) - YEAR(DOB__c)`

Functions
-- All Function Categories --
ABS
ACOS
ACOSMID
AND
ASCII
ASIN
[Insert Selected Function](#)

[Check Syntax](#) No syntax errors in merge fields or functions. (Compiled size: 71 characters)

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

5. Click **Next**, **Next** . Then click **Save**.



Now We Are Obtaining MArks

Now Next Field :

1. Click the **Object Manager** tab
2. In object Manager Go to Field & Relationship And Click On New



3. Next, choose a data type. Choosing a data type helps you format the field input. **For example**, if you create a field with the **Number** and click on Next .

Now Next Field :

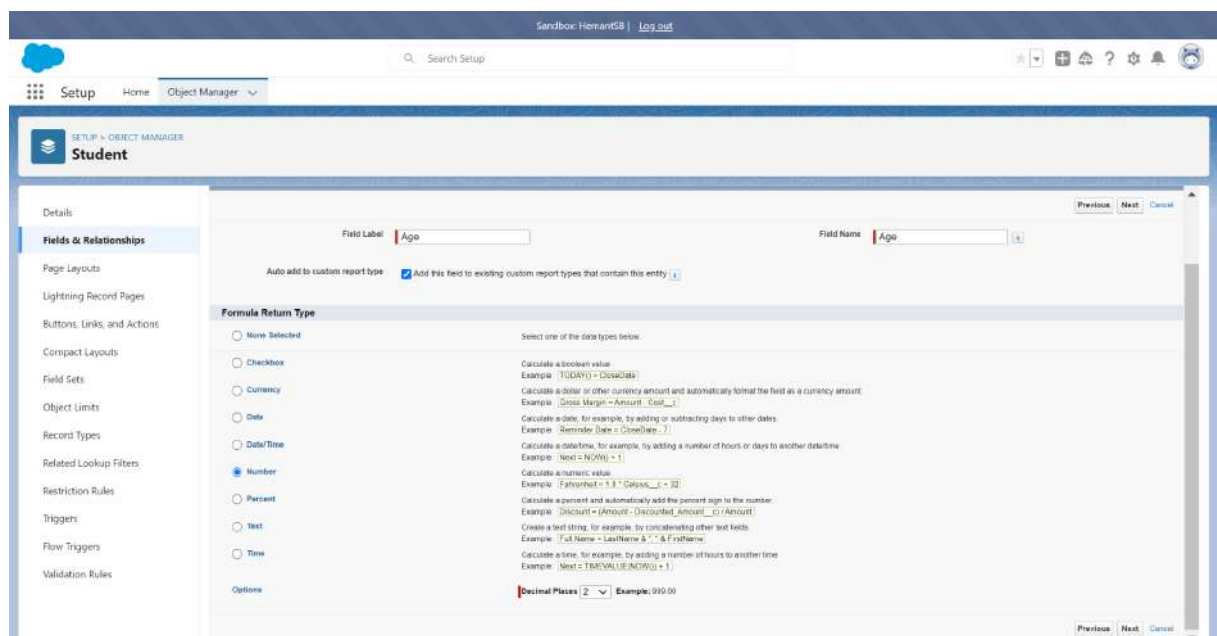
1. Click the **Object Manager** tab
2. In object Manager Go to Field & Relationship And Click On New



3. Next, choose a data type. Choosing a data type helps you format the field input. **For example**, if you create a field with the **Formula** and click on Next .



4. In new Custom Fields fill out the Field Label, Field Name and click on **Formula Return Type**



In new Custom Fields fill out the Field Label, Field Name and click **Next**

Sandbox: HemantS8 | Log out

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Step 2. Enter the details

Step 2 of 4

Field Label Marks

Length 18

Decimal Places 0

Field Name Marks

Description

Help Text

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

Unique ☒ Do not allow duplicate values

5. Click **Next**, **Next** . Then click **Save**.

Sandbox: HemantS8 | Log out

Setup Home Object Manager

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17 Items, Sorted by Field Label

Quick Find

New Deleted Fields Field Dependencies Set History Tracking

Created By	CreatedById	Lookup(User)
Currency	CurrencytoCode	Picklist
D.O.B	D_O_B__c	Date
Email	Email__c	Email
Gender	Gender__c	Picklist
Last Modified By	LastModifiedById	Lookup(User)
Marks	Marks__c	Number(18, 0)

Now Next Field :

1. Click the **Object Manager** tab
2. In object Manager Go to Field & Relationship And Click On New



3. Next, choose a data type. Choosing a data type helps you format the field input. **For example**, if you create a field with the **Formula** and click on Next .



4. In new Custom Fields fill out the Field Label, Field Name and click **on Formula Return Type**

Sandbox: HemantSB | Log out

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Field Label: Percentage Field Name: Percentage

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

Formula Return Type

☐ None Selected Select one of the data types below

☐ Checkbox Calculate a boolean value.
Example: $(\text{Total}) > \text{GoalDate}$

☐ Currency Calculate a dollar or other currency amount and automatically format the text as a currency amount.
Example: $(\text{Gross Margin} \times \text{Amount}) / \text{Cost}_c$

☐ Date Calculate a date, for example, by adding or subtracting days to other dates.
Example: $(\text{Reminder Date} - 7)$

☐ Date/Time Calculate a datetime, for example, by adding a number of hours or days to another datetime.
Example: $\text{Now} - \text{NOW()}/1$

☐ Number Calculate a numeric value.
Example: $(\text{Estimated} + 1.8) \times \text{Sales}_c \times 30$

☒ Percent Calculate a percent and automatically add the percent sign to the number.
Example: $(\text{Discount} \times (\text{Amount} - \text{Discounted_Amount}_c)) / \text{Amount}$

☐ Text Create a text string, for example, by concatenating other text fields.
Example: $(\text{Full Name} + \text{Last Name} \& " \& \text{First Name})$

☐ Time Calculate a time, for example, by adding a number of hours to another time.
Example: $\text{Now} + \text{TIMEVALUE(NOW())} \times 1$

Options **Decimal Places** 2 Example: 000.00

Previous Next Cancel

5. Now Select **Text** In Type and click on Next.

6. Enter This In Your Formula Editor : $\text{Marks}_c / 500$ as—

Sandbox: HemantSB | Log out

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New Custom Field

Step 3 of 5: 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: $(\text{Discount} \times (\text{Amount} - \text{Discounted_Amount}_c)) / \text{Amount}$ More Examples...

Simple Formula Advanced Formula

Insert Field Percentage (Percent) s
 $\text{Marks}_c / 500$

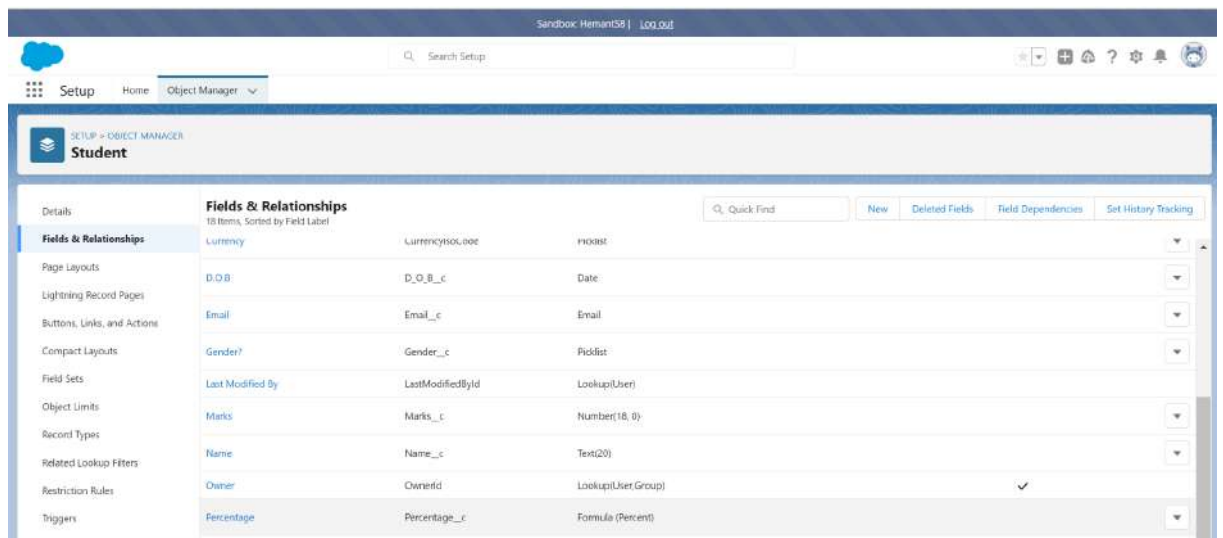
Insert Operator

Functions
-- All Function Categories --
ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN
Insert Selected Function

Quick Tips
• Getting Started
• Operators & Functions

Previous Next Cancel

5. Click **Next, Next** . Then click **Save**.



Now Next Field :

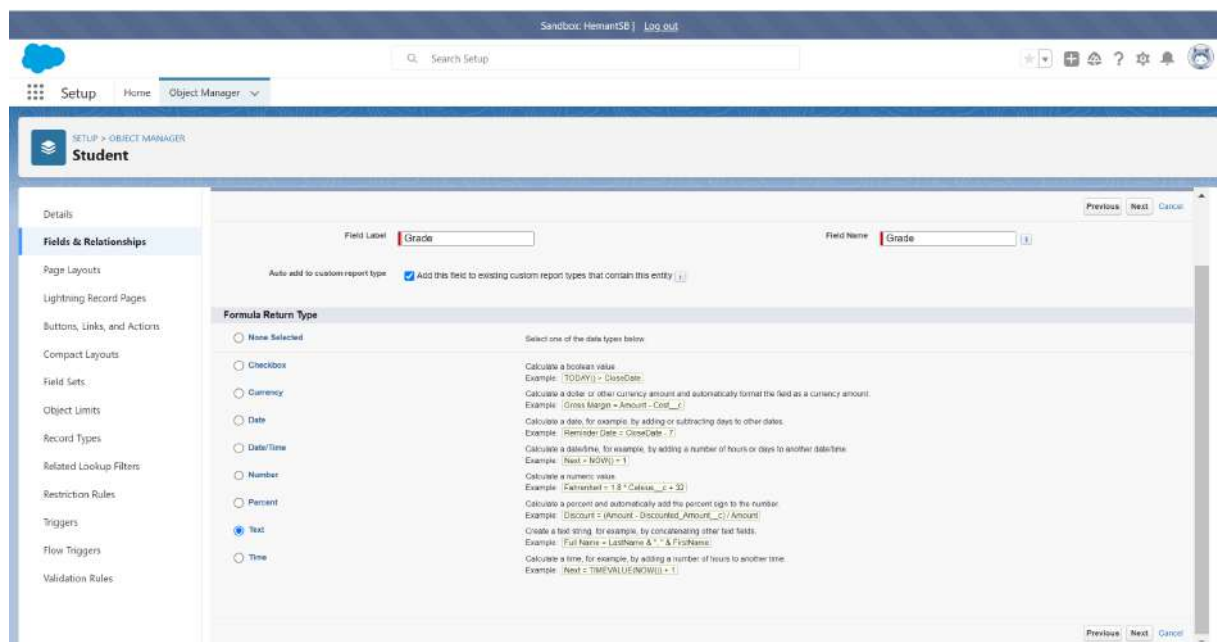
1. Click the **Object Manager** tab
2. In object Manager Go to Field & Relationship And Click On New



3. Next, choose a data type. Choosing a data type helps you format the field input. **For example**, if you create a field with the **Formula** and click on Next .

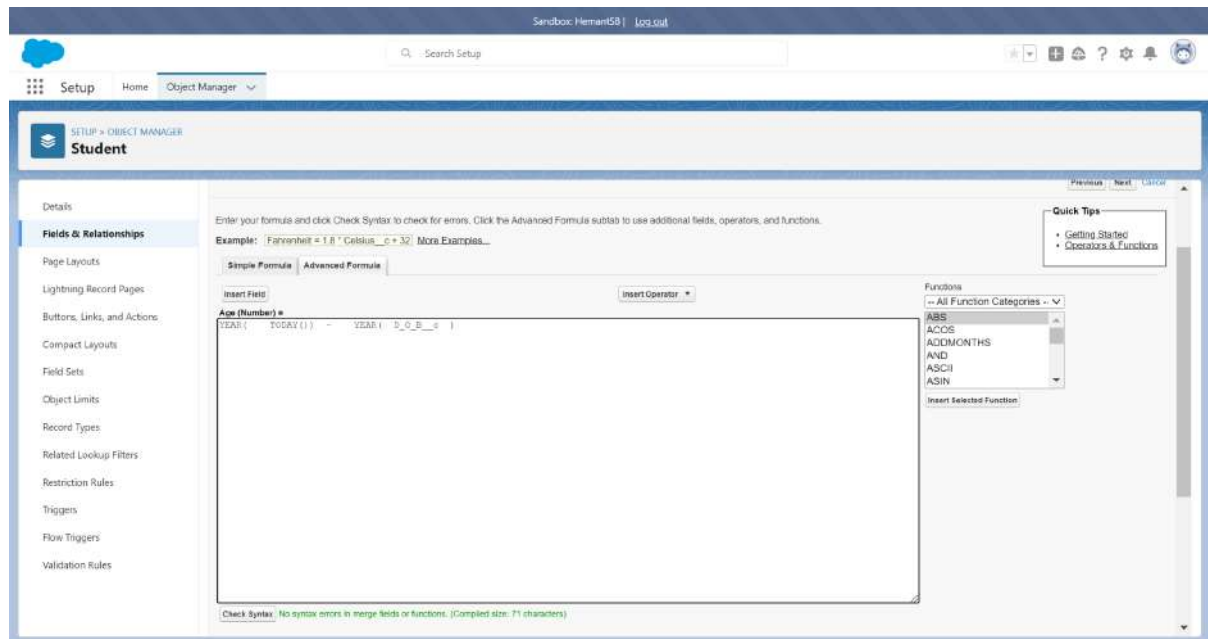


4. In new Custom Fields fill out the Field Label, Field Name and click **on Formula Return Type**

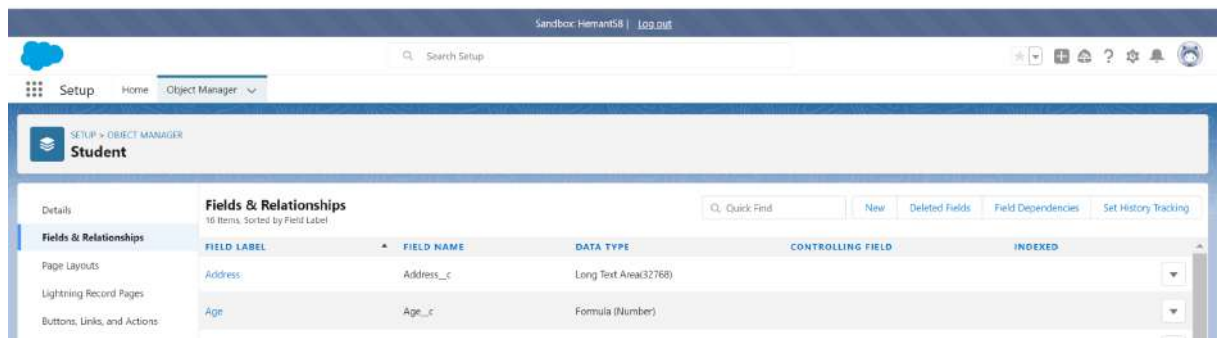


5. Now Select **Text** In Type and click on Next.

6. Enter This In Your Formula Editor : as—



5. Click **Next**, **Next** . Then click **Save**.



The Output For Above Question Will BE This :

The screenshot shows the Salesforce interface for the 'Student' object. The record ID is 'S_id-0000'. The 'Details' tab is active, displaying a list of fields and their values. The fields are organized into two columns. The first column contains fields like Student ID, Name, Phone, Class, Email, Course, D.O.B, Address, Gender, State, City, Age, Marks, and Percentage. The second column contains fields like Owner, Currency, and Created By. The record was created by Hemant Duggal on 12/07/2023 at 5:32 pm.

Field	Value
Student ID	S_id-0000
Name	Hemant
Phone	8828305680
Class	A
Email	hemant@gmail.com
Course	A
D.O.B	17/05/2000
Address	HNO 904 SECTOR 21 D, FARIDABAD
Gender	Male
State	Haryana
City	Faridabad
Age	23.00
Marks	190
Percentage	38.00%
Owner	Hemant Duggal
Currency	INR - Indian Rupee
Created By	Hemant Duggal: 12/07/2023, 5:32 pm
Last Modified By	Hemant Duggal: 12/07/2023, 5:32 pm

Here We CAN Also Change The Layout With layout Properties

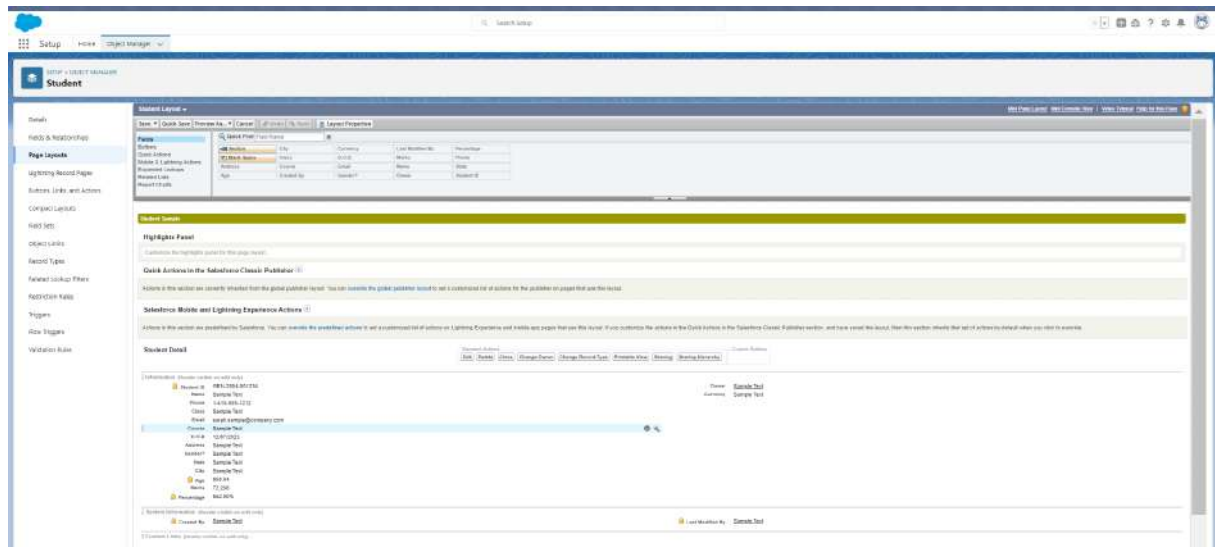
Steps To Change layout :

1. Go to Object Manager and select your Object Tap on Page Layout It Will Open Like This :

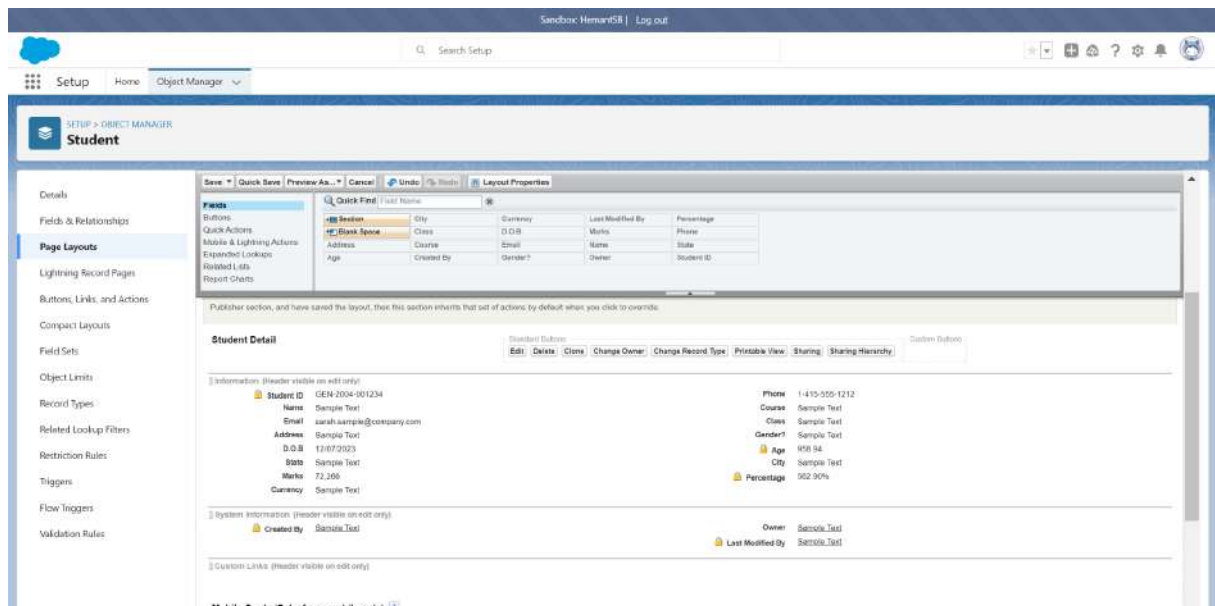
The screenshot shows the Salesforce Object Manager for the 'Student' object. The 'Page Layouts' tab is selected, displaying a list of page layouts. The table has columns for Page Layout Name, Created By, and Modified By. The first row shows the 'Student Layout' created by Hemant Duggal on 12/07/2023 at 5:32 pm.

Page Layout Name	Created By	Modified By
Student Layout	Hemant Duggal: 12/07/2023, 5:32 pm	Hemant Duggal: 12/07/2023, 5:32 pm

2. Click On Student Layout It will open Like This :



3. Use Drag And Drop Functionality to Change Layout



4. Then Finally Click On Save

FINAL OUTPUT OF BOVE EXAMPLE WILL BE :

Edit S_id-0000

Student ID S_id-0000	Phone <input type="text" value="8826305680"/>
Name <input type="text" value="Hemant"/>	Course <input type="text" value="A"/>
Email <input type="text" value="hemant@gmail.com"/>	Class <input type="text" value="A"/>
Address <input type="text" value="HNO 904 SECTOR 21 D , FARIDABAD"/>	Gender? <input type="text" value="Male"/>
D.O.B <input type="text" value="17/03/2000"/>	Age 23.00 <i>This field is calculated upon save</i>
State <input type="text" value="Haryana"/>	City <input type="text" value="Faridabad"/>
Marks <input type="text" value="190"/>	Percentage 38.00% <i>This field is calculated upon save</i>
Currency <input type="text" value="INR - Indian Rupee"/>	



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Students

Si



Student

S_id-0000

Related

Details

Student ID

S_id-0000

Name

Hemant

Email

hemant@gmail.com

Address

HNO 904 SECTOR 21 D , FARIDABAD

D.O.B

17/03/2000

State

HAryana

Marks

190

Currency

INR - Indian Rupee

Phone

8826305680

Course

A

Class

A

Gender?

Male

Age

23.00

City

Faridabad

Percentage

38.00%

Created By

Hemant Duggal, 12/07/2023, 3:32 pm

Owner

Hemant Duggal

Last Modified By

Hemant Duggal, 12/07/2023, 3:43 pm