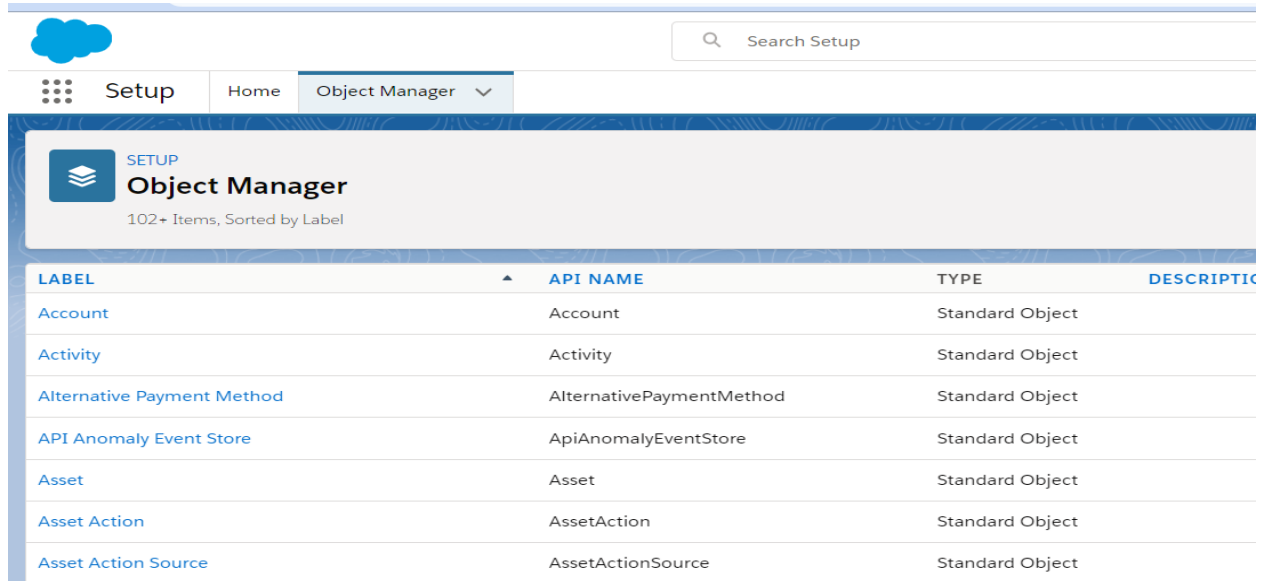


## Lecture 1 : Creating a Custom Field :

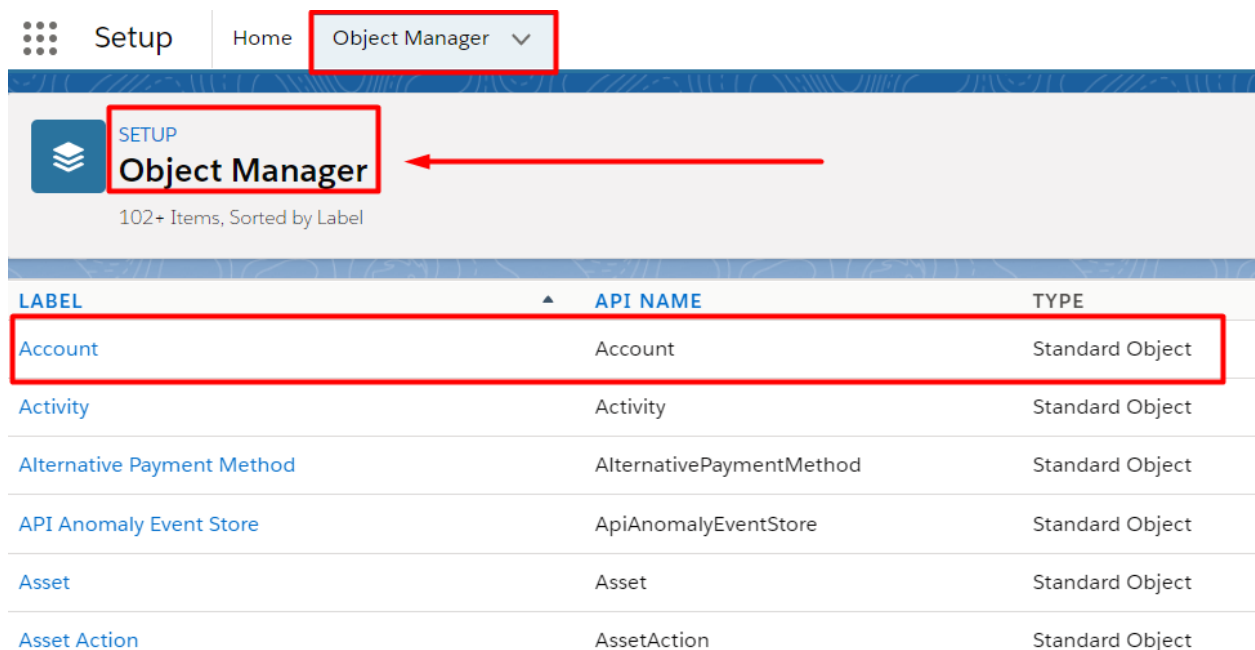
In this lecture, we will understand about fields and learn how to create them

**Step 1:** Salesforce provides two types of fields one is a standard field and another is a custom field so whenever objects are used in salesforce some fields are automatically generated by salesforce those are known as standard fields and if more fields are required then custom fields can be created.



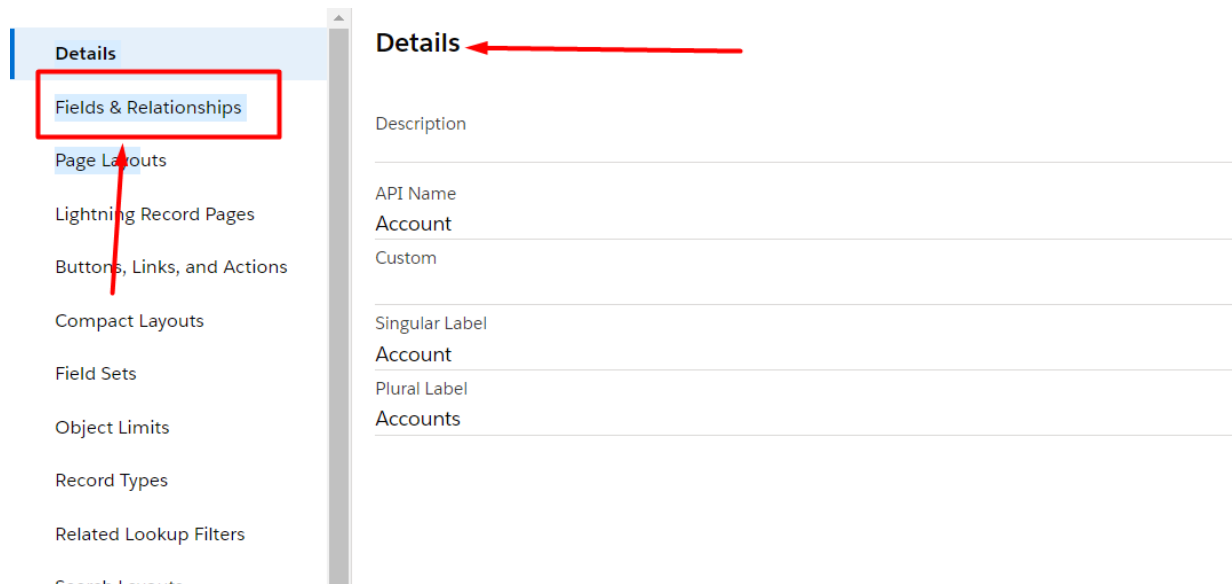
| LABEL                      | API NAME                 | TYPE            | DESCRIPTION |
|----------------------------|--------------------------|-----------------|-------------|
| Account                    | Account                  | Standard Object |             |
| Activity                   | Activity                 | Standard Object |             |
| Alternative Payment Method | AlternativePaymentMethod | Standard Object |             |
| API Anomaly Event Store    | ApiAnomalyEventStore     | Standard Object |             |
| Asset                      | Asset                    | Standard Object |             |
| Asset Action               | AssetAction              | Standard Object |             |
| Asset Action Source        | AssetActionSource        | Standard Object |             |

**Step 2:** For example, if you click on object manager and then click on 'Account' you will be directed to the next page



| LABEL                      | API NAME                 | TYPE            |
|----------------------------|--------------------------|-----------------|
| Account                    | Account                  | Standard Object |
| Activity                   | Activity                 | Standard Object |
| Alternative Payment Method | AlternativePaymentMethod | Standard Object |
| API Anomaly Event Store    | ApiAnomalyEventStore     | Standard Object |
| Asset                      | Asset                    | Standard Object |
| Asset Action               | AssetAction              | Standard Object |

**Step 3:** On the next page you will be able to see the information regarding the object account. then you have to click on the option fields and relationship.



**Step 4:** Once you click on the option fields and relationship you will be directed to the page where you will be able to find all the information regarding this particular object.

## Fields & Relationships

39 Items, Sorted by Field Label

Quick Find

| FIELD LABEL    | FIELD NAME    | DATA TYPE       |
|----------------|---------------|-----------------|
| Account Name   | Name          | Name            |
| Account Number | AccountNumber | Text(40)        |
| Account Owner  | OwnerId       | Lookup(User)    |
| Account Site   | Site          | Text(80)        |
| Account Source | AccountSource | Picklist        |
| Active         | Active__c     | Picklist        |
| Annual Revenue | AnnualRevenue | Currency(18, 0) |

**Step 5:** Now in order to differentiate between standard field and custom field you have to check under the second column 'field name' if in front of active if you see "\_\_c" then it's a custom field otherwise the field is standard. Say for example apart from active account source, site, owner ID, billing address, clean status, etc are standard fields.

| FIELD LABEL       | FIELD NAME          | DATA TYPE       |
|-------------------|---------------------|-----------------|
| Account Name      | Name                | Name            |
| Account Number    | AccountNumber       | Text(40)        |
| Account Owner     | OwnerId             | Lookup(User)    |
| Account Site      | Site                | Text(80)        |
| Account Source    | AccountSource       | Picklist        |
| Active            | Active__c           | Picklist        |
| Annual Revenue    | AnnualRevenue       | Currency(18, 0) |
| Billing Address   | BillingAddress      | Address         |
| Clean Status      | CleanStatus         | Picklist        |
| Created By        | CreatedById         | Lookup(User)    |
| Customer Priority | CustomerPriority__c | Picklist        |

**Step 6:** Now in order to create a custom field you have to go to object manager and search for your created custom object. In the last class, we created a custom object named property now we will be creating fields for it.

The screenshot shows the Salesforce Object Manager interface. At the top, there are tabs for 'Setup', 'Home', and 'Object Manager'. A red arrow points to the 'Object Manager' tab. Below the tabs, there is a search bar with the text 'property' entered. The main content area displays a table with one row representing the 'property' custom object. The table has columns for 'LABEL', 'API NAME', 'TYPE', 'DESCRIPTION', and 'LAST MODIFIED'. The row for 'property' shows 'property\_\_c' as the API name, 'Custom Object' as the type, 'abcd' as the description, and '5/27/2021' as the last modified date. A red box highlights the search bar and the table row.

| LABEL    | API NAME    | TYPE          | DESCRIPTION | LAST MODIFIED |
|----------|-------------|---------------|-------------|---------------|
| property | property__c | Custom Object | abcd        | 5/27/2021     |

**Step 7:** Once you click on your searched custom object click on fields and relationships. After clicking on that on the top right you will be able to see an option named 'new' click on that to create new fields.

| Fields & Relationships <span>Start time</span> |                  |                    |             |
|--|------------------|--------------------|-------------|
| + Items, Sorted by Field Label                 |                  | Quick Find         | New         |
| FIELD LABEL                                    | FIELD NAME       | DATA TYPE          | CONTROLLING |
| Created By                                     | CreatedById      | Lookup(User)       |             |
| Last Modified By                               | LastModifiedById | Lookup(User)       |             |
| Owner  | OwnerId          | Lookup(User,Group) |             |
| property Name                                  | Name             | Auto Number        |             |

**Step 8:** Once you click on the new button you will be directed to the next page having all the information of available data types and as per your requirement you can choose any of them.

Step 1. Choose the field type

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

Data Type

☒ None Selected
 

☐ Auto Number
 ☐ Formula
 ☐ Roll-Up Summary ⓘ
 ☐ Lookup Relationship
 ☐ Master-Detail Relationship
 ☐ External Lookup Relationship

Select one of the data types below.

A system-generated sequence number that uses a display format you define. The number is automatically incremented by 1.

A read-only field that derives its value from a formula expression you define. The formula field is updated whenever the record is saved.

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

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.

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

- 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 parent of the relationship.

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

**Step 9:** For example, if you want to create a field that can store the name of a property you can select the data type as “text” after selecting that click on next.

☐ Number  
☐ Percent  
☐ Phone  
☐ Picklist  
☐ Picklist (Multi-Select)  
☒ Text  
☐ Text Area  
☐ Text Area (Long)  
☐ Text Area (Rich)  
☐ Text (Encrypted) ⓘ  
☐ Time  
☐ URL

Allows users to enter any combination of letters and numbers.

Next

**Step 10:** After clicking on the next the second step is to fill in the information regarding the custom field that you are creating. On this page, you are supposed to fill in information like field label, length, name, description, etc.

property  
New Custom Field

Step 2. Enter the details

Field Label

Length

Field Name

Description

Help Text

Required

Unique

External ID

Please enter the maximum length for a text field below.

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

☐ Do not allow duplicate values

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

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

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

**Step 11:** Once you have completed filling in the information you have to click next. The third step in the creation of the field is establishing field-level security under which you can restrict the availability of this field for a certain profile user. So in order to do that you can enable or disable accordingly by clicking on the checkboxes available in front of them, you can also enable or disable options such as visible or read-only.

Step 3. Establish field-level security

Field Label: property name  
Data Type: Text  
Field Name: property\_name  
Description: name of the property

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

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

**Step 12:** Once you click on next you will be directed to step four which is to add a page layout. in order to add a page layout, you have to click on the checkbox and enable it once done with that click save, or if you want to save this field and create new you have to click on save and new.

property  
New Custom Field

Step 4. Add to page layouts

Field Label: property name  
Data Type: Text  
Field Name: property\_name  
Description: name of the property

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

| Add Field                           | Page Layout Name |
|-------------------------------------|------------------|
| <input checked="" type="checkbox"/> | property Layout  |

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