

1)

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Salesforce CDP API Developer Guide

**Salesforce**  
Salesforce, Inc. is an American cloud-based software company.

salesforce.com

Salesforce, Inc. is an American cloud-based software company headquartered in San Francisco, California. Wikipedia

Headquarters: San Francisco, CA  
Founder(s): Dave Moellenhoff, Frank Dominguez, Marc Benioff, Parker Harris  
Founded: 1999  
Employees: 56,606

2)

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First Name\*  
Rajat

Last Name\*  
Sharma

Email\*  
sharmarajatraj1@gmail.com

Role\*  
Developer

Company\*  
Just Learning

3) Check you email for verification and then give password and other small thing and done.

developer@salesforce.com <developer@salesforce.com> 1:28AM

to me

**Thanks for signing up with Salesforce!**

Click below to verify your account.

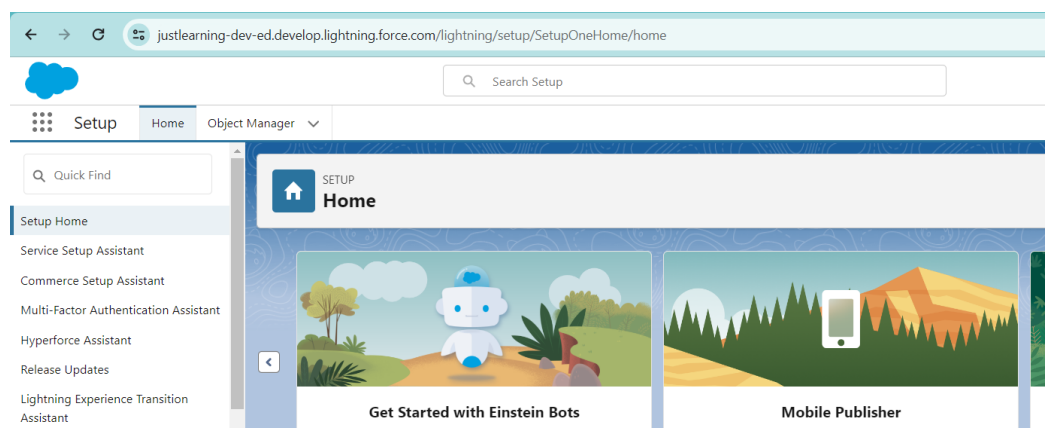
**Verify Account**

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

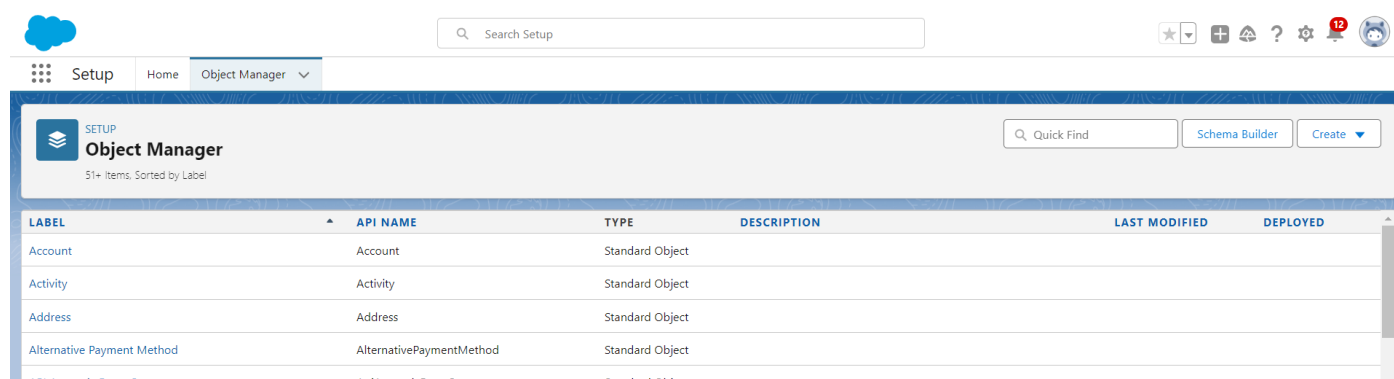
Username:  
[sharmarajatraj1@gmail.com](mailto:sharmarajatraj1@gmail.com)

Small. OK No thanks X

#### 4) You will reach page like this



#### 5) You will create a custom object here.



#### 6) Enter values for custom object like Student / students (description "Student who issue books") and similarly book / books ( description "add book name")

The screenshot shows the 'New Custom Object' form in Salesforce. The form is titled 'New Custom Object' and contains a warning message: 'Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more!](#) [Don't show](#)'. Below the warning, there are buttons for 'Save', 'Save & New', and 'Cancel'. The form is divided into sections: 'Custom Object Information' and 'Custom Object Definition Edit'. The 'Custom Object Information' section contains fields for 'Label' (book), 'Plural Label' (books), 'Starts with vowel sound' (checkbox), 'Object Name' (book), 'Description' (add book name), 'Context-Sensitive Help Setting' (radio buttons for 'Open the standard Salesforce.com Help & Training window' and 'Open a window using a Visualforce page'), and 'Content Name' (None).

**Custom Object Information**

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

Label:  Example: Account

Plural Label:  Example: Accounts

Starts with vowel sound: ☐

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

Object Name:  Example: Account

Description:

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

Content Name:

## 7) you can check all created objects and “\_c” custom object

The screenshot shows the Salesforce Object Manager interface for a custom object named 'book'. The left sidebar contains a navigation menu with options like 'Details', 'Fields & Relationships', 'Page Layouts', etc. The main content area displays the 'Details' for the 'book' object. A red circle highlights the 'API Name' field, which is 'book\_c'. Another red circle highlights the 'New Object' button in the top navigation bar. The 'Description' field contains 'add book name'. The 'Singular Label' is 'book' and the 'Plural Label' is 'books'. The 'Custom' checkbox is checked.

## 8) Go to Fields and Relationships and make new columns

The screenshot shows the 'Fields & Relationships' section for the 'book' custom object. The left sidebar contains a navigation menu with options like 'Details', 'Fields & Relationships', 'Page Layouts', etc. The main content area displays a table of fields. A red circle highlights the 'New' button in the top navigation bar. The table has columns for 'FIELD LABEL', 'FIELD NAME', 'DATA TYPE', and 'CONT'. The fields listed are 'book Name' (Name, Text(80)), 'Created By' (CreatedBy, Lookup(User)), 'Last Modified By' (LastModifiedBy, Lookup(User)), and 'Owner' (OwnerId, Lookup(User,Group)).

The screenshot shows the 'New Field' dialog box in Salesforce. The 'Field Label' is 'Author Name'. The 'Length' is set to 20. The 'Field Name' is 'Author\_Name'. The 'Description' is 'We can add author name'. The 'Required' checkbox is checked. The 'Unique' checkbox is unchecked. The 'External ID' checkbox is unchecked. The 'Auto add to custom report type' checkbox is checked. The 'Previous', 'Next', and 'Cancel' buttons are at the top right.

->Next -> “Save” or “Save & new”

**Step 4. Add to page layouts** Step 4 of 4

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

Field Label	Author Name
Data Type	Text
Field Name	Author_Name
Description	We can add author name

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"/>	book Layout

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

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

[Quick Find](#) [New](#) [Deleted Fields](#) [Field Dependencies](#) [Set History](#)

5 items, sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIE...	INDEXED
Author Name	Author_Name__c	Text(20)		
book Name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Publisher	Publisher__c	Text(30)		

## 9) Similarly add some columns to student\_A

**SETUP > OBJECT MANAGER**  
**student\_A**

[Details](#)  
**Fields & Relationships**  
[Page Layouts](#)  
[Lightning Record Pages](#)  
[Buttons, Links, and Actions](#)  
[Compact Layouts](#)  
[Field Sets](#)  
[Object Limits](#)

[Quick Find](#) [New](#) [Deleted Fields](#) [Field Dependencies](#)

5 items, sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIE...
Class	Class__c	Text(10)	
Created By	CreatedById	Lookup(User)	
Last Modified By	LastModifiedById	Lookup(User)	
Owner	OwnerId	Lookup(User,Group)	
student_A Name	Name	Text(80)	

## 10) Go to Setup or home and search Tab on side bar. Click on new to create new tab

**Manager** [▼](#)

**SETUP**  
**Tabs**

**Custom Tabs**

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

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation Experience and the mobile app.

**Custom Object Tabs** [New](#) [What Is This?](#)

No Custom Object Tabs have been defined

**Web Tabs** [New](#) [What Is This?](#)

No Web Tabs have been defined

**Custom Object Tabs** [New](#) [What Is This?](#)

Action	Label	Tab Style
<a href="#">Edit</a>   <a href="#">Del</a>	books	Bottle
<a href="#">Edit</a>   <a href="#">Del</a>	students_A	Computer

## 11) Go to App Manager by searching App and create New Lightning app

**App Details & Branding**

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

**App Details**

- \* App Name: Library Management System
- \* Developer Name: Library\_Management\_System
- Description: For managing lib with student A and book:

**App Branding**

- Image: [Upload Image]
- Primary Color Hex Value: #0070D2
- Org Theme Options: ☐ Use the app's image and

Next

### App Options

#### Navigation and Form Factor

##### \* Navigation Style

- ☒ Standard navigation
- ☐ Console navigation

##### \* Supported Form Factors

- ☒ Desktop and phone
- ☐ Desktop
- ☐ Phone

#### Setup and Personalization

##### Setup Experience

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

##### App Personalization Settings

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

(no change)->Next again -> Add tabs (we created above)

We can also add random tabs like contact dashboard etc.

### Navigation Items

include in the app, and arrange the order in which they appear. Users can persor but users can't remove or rename the items that you add. Some navigation items: ktop. These items are dropped from the navigation bar when the app is viewed i doesn't support.

Available Items

Create

Type to filter list...

- Contracts
- Coupons
- Credit Memos
- Customers

#### Selected Items

- students\_A
- books
- Contacts
- Dashboards

### User Profiles

Choose the user profiles that can access this app.

#### Available Profiles

- Type to filter list
- Minimum Access - Sa...
- Partner App Subscrip...
- Partner Community L...
- Partner Community ...
- Read Only
- Salesforce API Only S...

#### Selected Profiles

System Administrator

->Save

## 12) go to 9 dots and search library management system

Setup

Home

Object Manager

lib

Apps

- Library Management System

Items

No results

View All

### 13) Add data to tables

The screenshot shows the 'Library Management' application interface. At the top, there is a navigation bar with a grid icon and the text 'Library Management...'. Below this, there are four tabs: 'students\_A', 'books', 'Contacts', and 'Dashboards'. The 'students\_A' tab is currently selected and highlighted. Red brackets are drawn around the 'students\_A' and 'books' tabs, and another red bracket is drawn around the 'Dashboards' tab. Below the navigation bar, there is a header section for the 'students\_A' table. It includes a purple icon, the text 'students\_A', and a dropdown menu labeled 'Recently Viewed'. To the right of this header, there are two buttons: 'New' and 'Import'. A red bracket is drawn around these two buttons. Below the header, there is a table with one row. The first column is labeled 'student\_A Name' and the second column is labeled 'Sarthak'. The name 'Sarthak' is highlighted with a red bracket. The table also shows '1 item' and 'Updated a few seconds ago'.

student_A Name
Sarthak