

Salesforce Customization: A Practical Guide to Standard & Custom Fields

Salesforce is powerful out of the box, but the real magic happens when you customize it to match your business process. Whether you're working with recruiters, sales teams, or IT operations, the ability to tailor objects, fields, and page layouts is what turns Salesforce from a CRM into *your* CRM.

In this guide, I'll walk through the core customization areas every admin or developer should know.

1. Standard vs Custom Fields — The Foundation

Salesforce gives you **standard fields** (like Name, Created Date, Owner) and lets you create **custom fields** (like Candidate Status, Onboarding Stage, Access Level).

Why this matters:

- Standard fields = system-defined, limited control
- Custom fields = fully configurable
- You can control visibility, validation, help text, and security

Best practice:

Only create custom fields when a standard field **cannot** serve the purpose. This keeps your org clean and scalable.

2. Picklists & Field Dependencies — Controlling Data Quality

Picklists help users select values instead of typing free text. This keeps data consistent.

Example:

Instead of typing a department name manually, users choose from:

- IT
- Sales
- Recruiting
- Finance

Field Dependencies take this further.

Example:

- Type = Workforce Experience
- Sub-Type options change dynamically:
 - Job Enquiry
 - Personal Details Update
 - Spam

This prevents wrong combinations and improves reporting accuracy.

3. Lookup Filters — Smart Record Relationships

Lookup fields connect one object to another (like Contact → Account).

Lookup Filters ensure users only select *valid* records.

Example:

Only show **Active Accounts** when linking a Contact.

Benefits:

- Prevents bad data
 - Guides users automatically
 - Reduces manual validation rules
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4. Formula Fields — Automating Calculations

Formula fields calculate values automatically.

Common use cases:

- Days since case was opened
- Full Name (First + Last)
- SLA breach indicators
- Auto status flags

No automation needed — the value updates in real time.

5. Record Types — One Object, Multiple Processes

Record Types allow the same object to behave differently for different teams.

Example:

Case object with record types:

- IT Support
- HR Requests
- Workforce Experience

Each record type can have:

- Different picklist values
- Different page layouts
- Different business processes

This is essential in large organizations.

6. Page Layouts — User Experience Matters

Page layouts control what users **see and edit**.

You can:

- Show fields only to specific profiles
- Make fields required
- Arrange sections logically
- Add related lists

Good layouts = faster user adoption.

Bad layouts = users avoid Salesforce.

7. Field History Tracking — Audit & Compliance

Field History Tracking logs changes to important fields.

Example:

Track changes to:

- Status
- Owner
- Priority
- Access Level

This is critical for:

- Audits
 - Security reviews
 - SLA disputes
 - Leadership reporting
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8. Validation Rules — Enforcing Business Logic

Validation rules stop bad data *before* it's saved.

Example:

- ✗ Close a case without Resolution
- ✗ Submit a record without Department
- ✗ Enter phone number without country code

Instead of fixing data later, you prevent the error upfront.

9. Customization Strategy — Don't Just Build, Design

Before creating anything in Salesforce, ask:

- Is there already a standard field?
- Will this impact reporting?
- Who needs access?

- Do we need automation later?

A well-designed data model saves **months** of rework.

10. Real-World Impact

When done right, these customizations:

- Improve data accuracy
- Reduce manual work
- Speed up onboarding
- Enable better reporting
- Support automation and integrations

For example, in a recruiting org, proper field dependencies and validation rules can prevent incorrect candidate submissions and improve client reporting instantly.

Final Thoughts

Salesforce customization isn't just about adding fields — it's about designing a system that reflects your business logic.

Master these areas:

- Fields
- Picklists
- Dependencies
- Record Types
- Layouts
- Validation
- History Tracking

Which one do you want for your next Medium post?