



SALESFORCE ADMINISTRATION

Rapid Learning & Just In Time Support

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1 Introduction

Info

- This document describes basic Administration of Salesforce Web Application.
Document focuses on using built in functionality and user interface.
- Both of these can be extended by developing custom functionality and user interface using Apex programming language.
This is covered in additional document "Salesforce Development - JITS".

1.1 What is Salesforce

Info

- This chapter gives short overview on Salesforce.
- Salesforce is CRM Web Application based on MVC - Model View Controller approach.

CRM

- CRM stands for Customer Relationship Management.
- Generally speaking CRM is type of application dedicated for working with your customers and allows you
 - to maintain database of your current and potential customers organized into companies and their workers
Salesforce stores companies data into Accounts and workers data into Contacts
 - to maintain database of products and services offered by your company
 - to define different sales processes in order to automate Leads collection, Offers creation, Contracts executions followed by delivery, billing, reporting and other related processes

Web Application

- Web Application is type of application which is accessed through Web Browser like: Internet Explorer, Chrome and such.
- This means that nothing is being locally installed on your PC.
- All data is being stored on the remote servers or to use modern term "In the cloud" which means that you
 - can access Application from any device as long as it is connected to internet and has Web Browser
 - don't have to buy and maintain expensive hardware in order to run the servers on which application should run
 - don't need extra space for that hardware like dedicated server rooms
 - don't need army of IT experts that might be needed to maintain that hardware or supporting software like databases or web servers

Salesforce as CRM application

- At the beginning Salesforce was just a dedicated CRM Web Application.
- This means that you could only use it as it is.
- You couldn't use it to create your own heavily customizable functionality.
- At that time Salesforce was not considered a framework, collection of tools which allows you to build your own applications.

Salesforce as framework

- With time Salesforce grew to a full blown web framework.
- This means that it added functionality that allows users to add their own custom functionality to basic CRM application by
 - creating their own custom Objects
 - creating their own workflows, processes, validations, reporting and such
 - using Java Script and Apex programming languages to create custom web pages and functionality
- But all this extra functionality is heavily oriented toward sales and billing processes, web shops and such.
So don't expect to be using Salesforce framework to create modern web based games or online educational materials.

Salesforce as two headed beast

- Salesforce history is to blame that currently Salesforce behaves as two headed beast.
- Once you learn how framework works you have to start over learning how core CRM functionality works.
- This is so because core CRM functionality is not based on the framework but rather existed before framework was born.
- As a result core CRM functionality behaves differently than the framework by having functionalities not supported by the framework which can be very confusing at times.

MVC - Data Model

- To store data Salesforce uses Objects, Records and Fields which represent Data Model part of MVC approach. These are stored into Oracle relational database as Tables, Rows and Columns.
- So each Object, together with its Fields, defines specific type of data. For instance Account Object represents Company and contains Fields for holding data specific for each company like: Name, Address, Number of employees, Type of industry and such. For each specific Company, Record of Account Object is created and values specific for that company are entered into mentioned fields. Each such record is stored as a row in DB in Table called Account.

MVC - Controller

- To define business logic Salesforce uses workflows, validation rules and custom programming code which together represents Controller part of MVC approach.
- Workflow defines how data should be changed.
- Validation rules take care of data integrity insuring that data makes sense so that users can't enter whatever they want.
- Custom Java Script and Apex programming code allows deep level of business logic customization that might not be supported by built in functionality like workflows and validation rules.

MVC - View

- To interact with users Salesforce uses Web Pages which represent View part of MVC approach.
- Examples of such Web Pages are
 - Page Layouts which define which Fields of specific Object will be presented to user and in which order
 - workflow rules which allow you to define sales processes, that is how data should be altered
 - validation rules which allow you to maintain data integrity by defining rules which data must obey to be altered
- Salesforce also supports creation of customizable Web Sites, collections of Web Pages.

Other components

- Beside data, logic and UI components Salesforce also supports additional functionality like
 - security
 - reporting
 - tools for exporting and importing data like Data Loader or Import Wizard
 - tools for developing code like Developer Console, Eclipse plugins

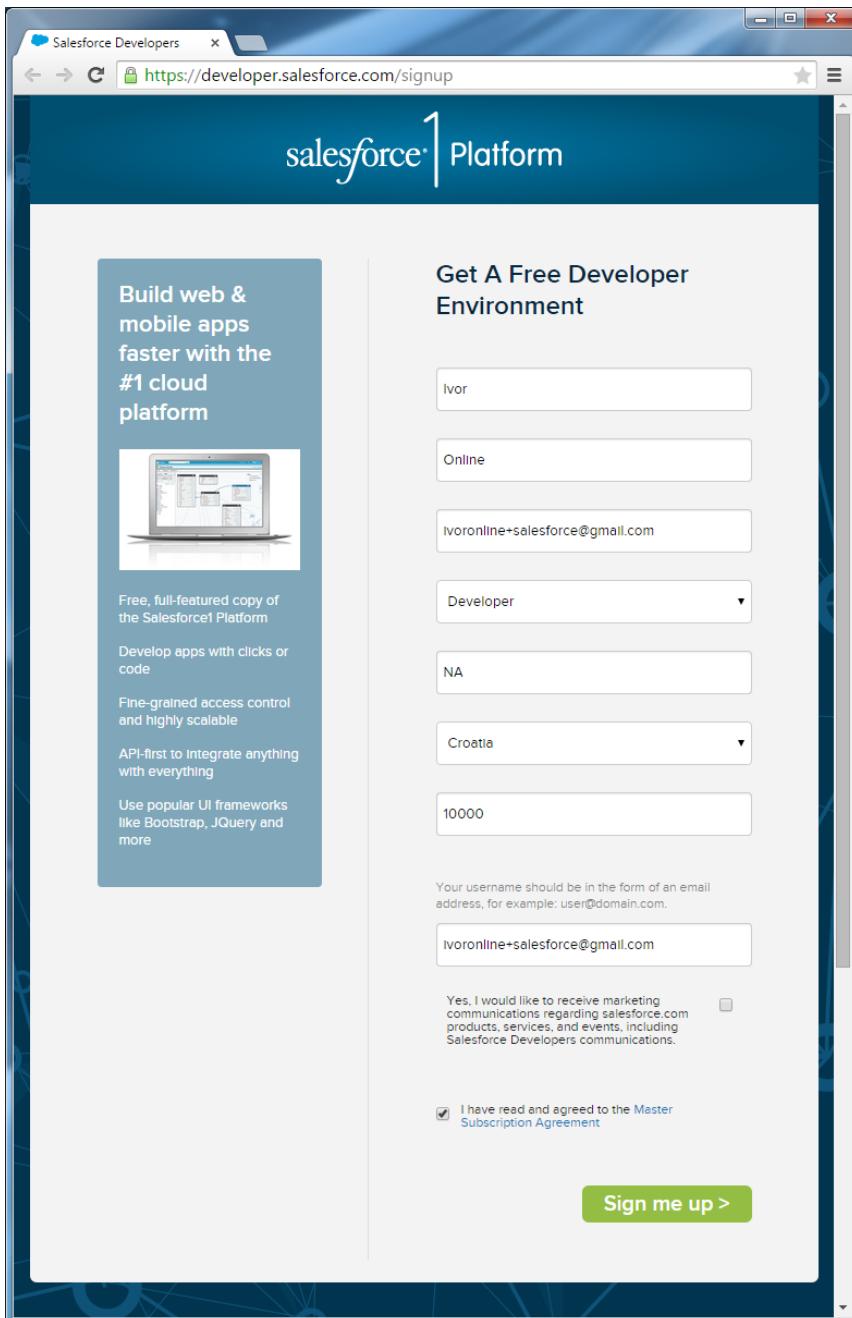
1.2 Create salesforce.com development org

Info

- This tutorial shows how to create new salesforce.com development org.

Create Account

- <https://www.developerforce.com/events/regular/registration.php>
- First name: Ivor
- Last name: Online
- Email: ivoronline+salesforce@gmail.com
- Developer
- Company: NA
- Croatia
- Postal Code: 10000
- Username: ivoronline+salesforce@gmail.com
- I have read and agreed: CHECK
- Sign me up

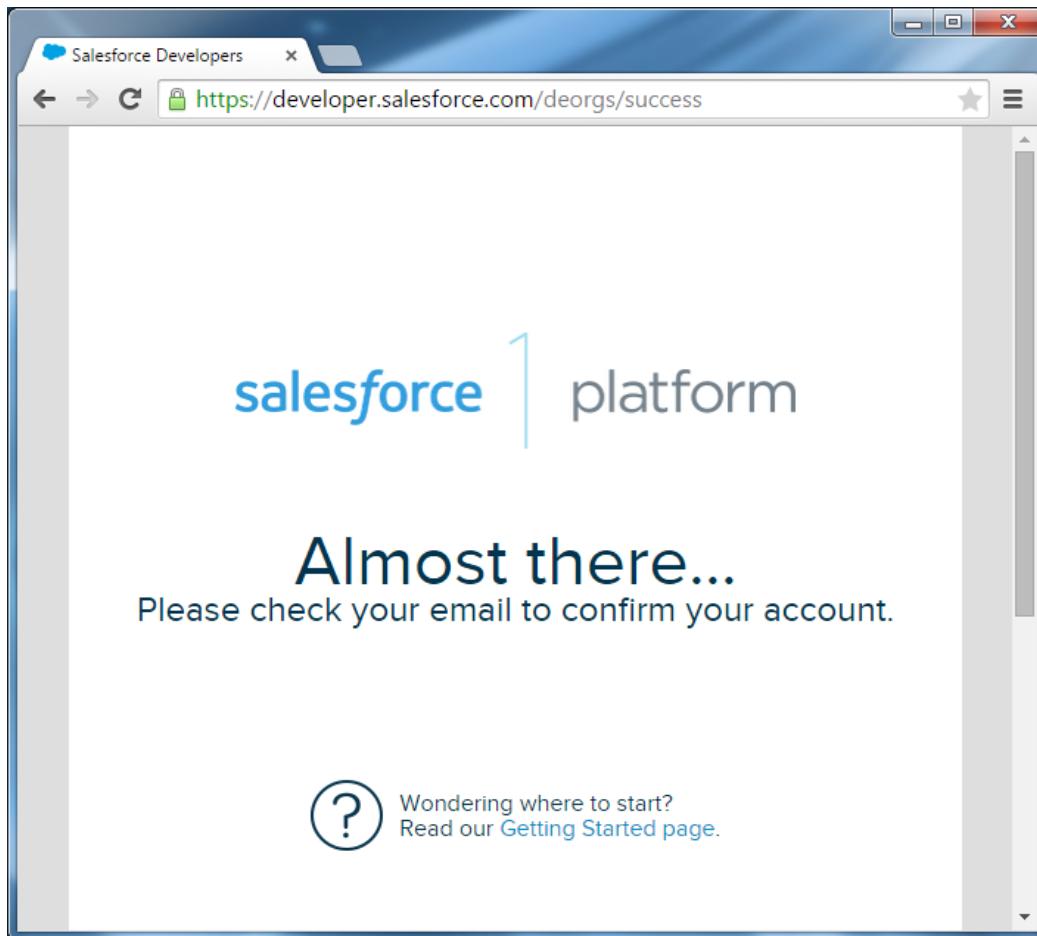


The screenshot shows a web browser window for the Salesforce Developers sign-up page. The URL in the address bar is <https://developer.salesforce.com/signup>. The page has a dark blue header with the text "salesforce1 Platform". On the left, there is a sidebar with text and icons. The main form on the right is titled "Get A Free Developer Environment". It contains fields for First Name (Ivor), Last Name (Online), Email (ivoronline+salesforce@gmail.com), and a dropdown for Company (Developer). Below these are fields for Zip/Postal Code (NA), Country (Croatia), and Postal Code (10000). A note says "Your username should be in the form of an email address, for example: user@domain.com." followed by a text input field with the value "ivoronline+salesforce@gmail.com". There is a checkbox for marketing communications and a checkbox for the Master Subscription Agreement, both of which are checked. At the bottom is a green "Sign me up >" button.

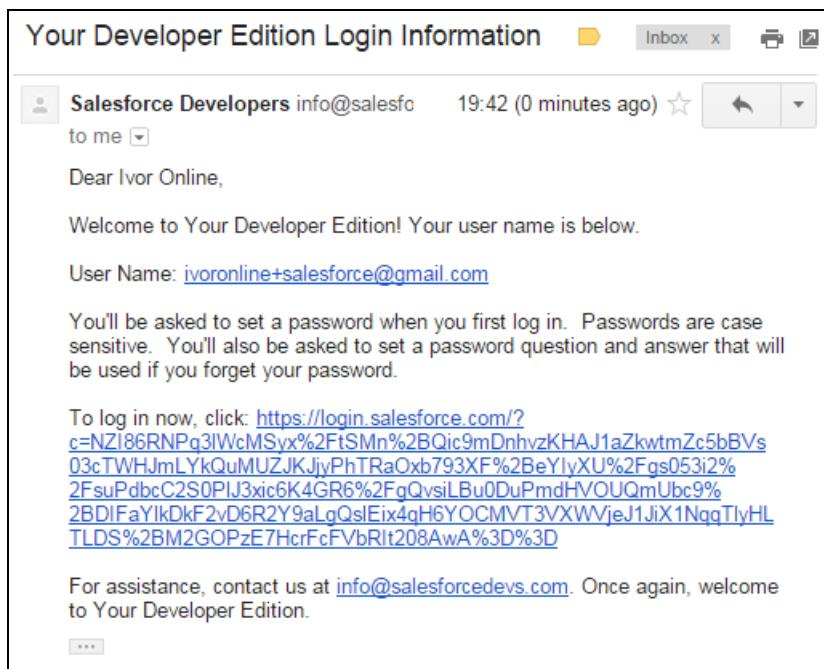
Activate Account

- Check Email
- Click on link in Email
- New Password: B...5
- Verify New Password: B...5
- Question: What is your pet's name
- Answer: Rex
- Save

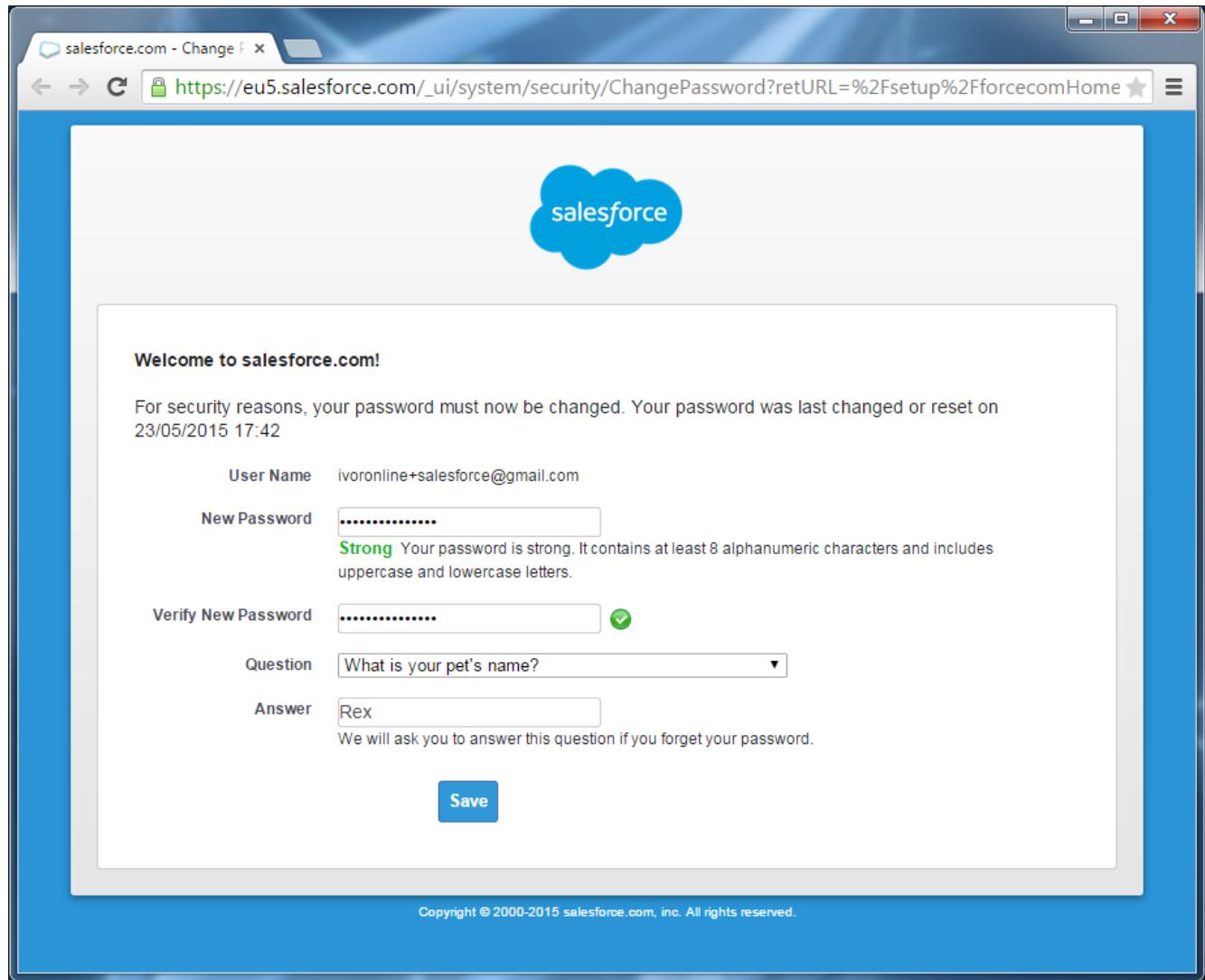
Check Email



Click on link in Email



Enter Password

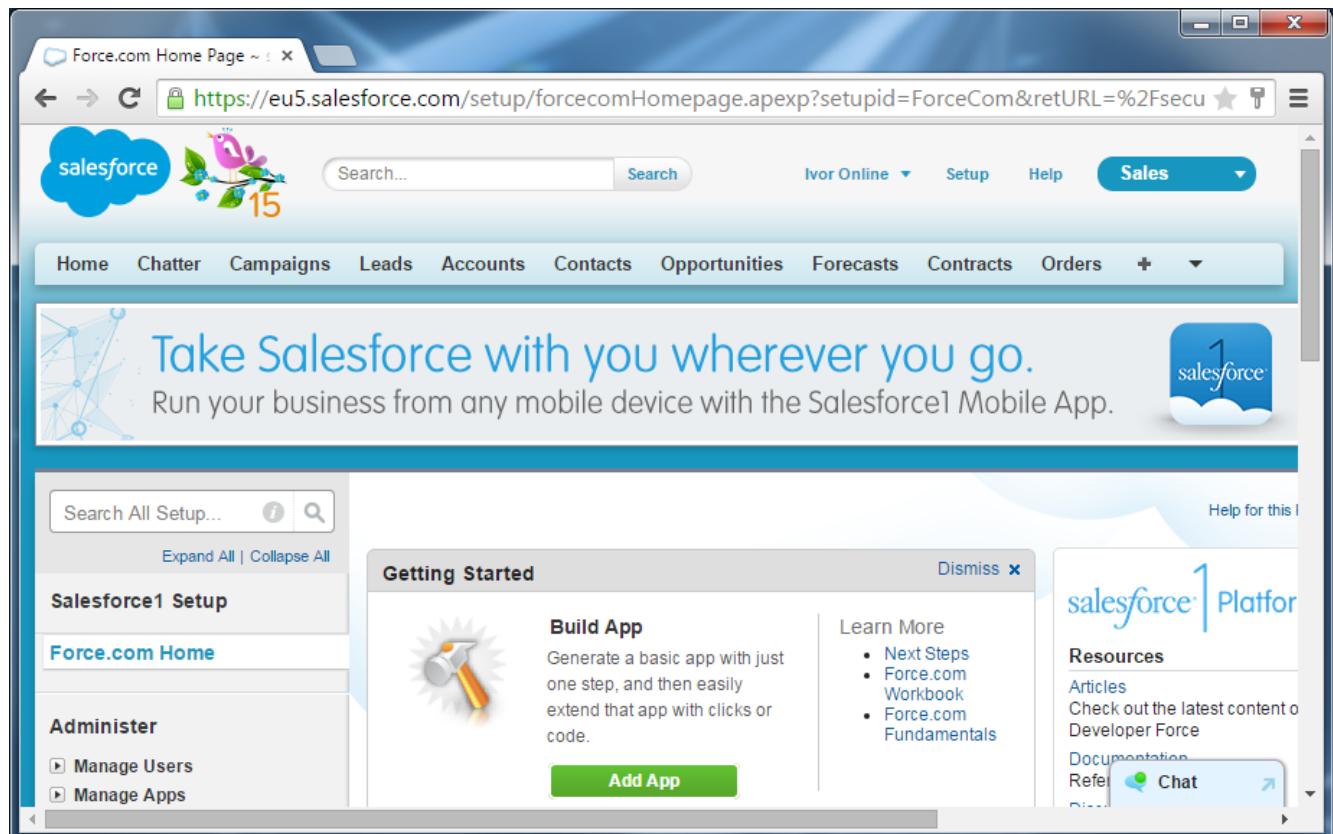


The screenshot shows the Salesforce password change interface. At the top, the URL is https://eu5.salesforce.com/_ui/system/security/ChangePassword?retURL=%2Fsetup%2FforcecomHome. The page features the classic blue cloud logo. A message at the top says, "Welcome to salesforce.com! For security reasons, your password must now be changed. Your password was last changed or reset on 23/05/2015 17:42". The form fields include:

- User Name: ivoronline+salesforce@gmail.com
- New Password: (labeled "Strong" as it contains at least 8 alphanumeric characters and includes uppercase and lowercase letters)
- Verify New Password: (with a green checkmark icon)
- Question: What is your pet's name? (dropdown menu)
- Answer: Rex

Below the form, a note says, "We will ask you to answer this question if you forget your password." A blue "Save" button is at the bottom. At the very bottom of the page, a copyright notice reads, "Copyright © 2000-2015 salesforce.com, inc. All rights reserved."

Initial screen



The screenshot shows the Salesforce1 mobile app setup screen. The URL is <https://eu5.salesforce.com/setup/forcecomHomepage.apexp?setupid=ForceCom&retURL=%2Fsecu>. The top navigation bar includes the Salesforce logo, a bird icon, a "15" badge, a search bar, and a "Sales" tab. The main content area features a banner with the text "Take Salesforce with you wherever you go." and "Run your business from any mobile device with the Salesforce1 Mobile App." Below the banner, a "Getting Started" box titled "Build App" with a hammer icon, and a "Learn More" section with links to "Next Steps", "Force.com Workbook", and "Force.com Fundamentals". The left sidebar includes "Salesforce1 Setup" and "Force.com Home" under "Salesforce1 Setup", and "Administer" with "Manage Users" and "Manage Apps" under "Administer". The right sidebar includes "Help for this I", "salesforce1 Platform", "Resources", "Articles", "Documentation", "Refer", "Chat", and "Help".

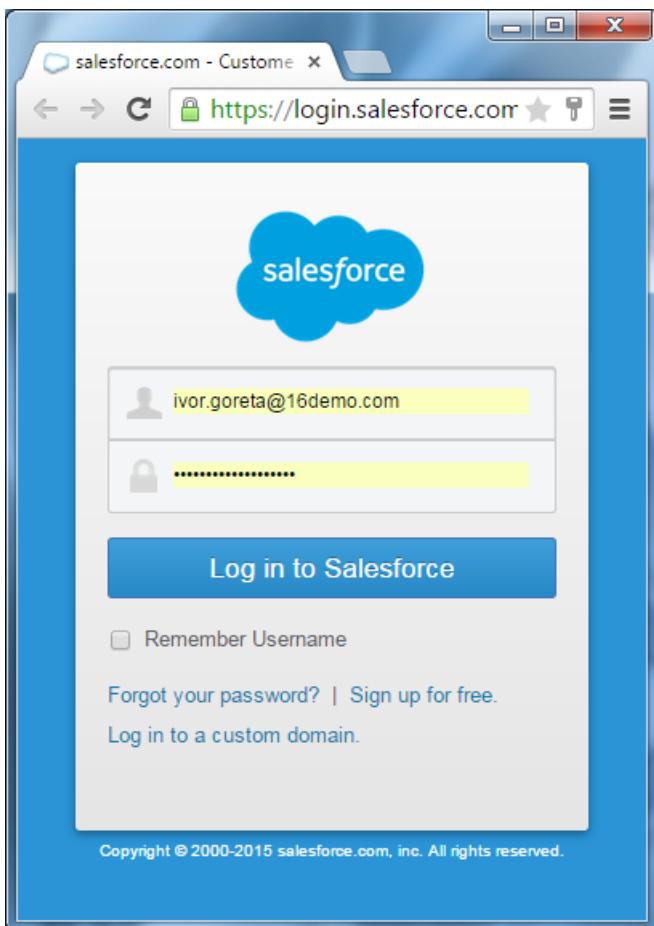
1.3 Login

Info

- This chapter shows how to login into Salesforce as a specific user.
- This can be done by using any Web Browser like: Internet Explorer, Google Chrome, Safari, Opera, Firefox, etc.
- Exact URL may differ since any domain name can be connected to Salesforce.
- Additional [Activation](#) will be required when logging for the first time from a new device.

Procedure

- Start Web Browser
- URL: <https://login.salesforce.com>
- User Name: ivor.goreta@16demo.com
- Password: B...0
- Login



Activation

(Needed when logging for the first time from a new device)

- (Email me a verification code)
- Open Email
- Copy verification code from Email
- Paste verification code into Web Form
- Verify my code and log me in

Your salesforce.com Activation Email Inbox X

 support@salesforce.com <support@salesforce.com> 20:51 (1 minute ago) Star Forward Down

to me Down

 English Down > Dutch Down Translate message Turn off for: English X

Dear ivoronline@gmail.com,

You have requested access to [salesforce.com](https://www.salesforce.com) from an unknown device. Use the verification code below within 24 hours to activate this device.

Verification Code: 12725

IMPORTANT: If you have not requested to activate a device, or believe you have received this message in error, please contact [salesforce.com support \(support@salesforce.com\)](mailto:support@salesforce.com) immediately.

What does "activation" mean? Should I activate this computer?

Activation helps reduce the risk of security issues related to login. Activating this computer helps [salesforce.com](https://www.salesforce.com) recognize this computer when you use it to access [salesforce.com](https://www.salesforce.com). You should activate this computer if it is owned by you or your employer and you are confident it is free of malware.

salesforce.com - Activation X

https://na9.salesforce.com/_nc_external/system/security/ic/ICValidate?icid=aimaRGd0bc Star Up Down Left Right Home Back Forward Stop Refresh New Search Help Bookmarks Other bookmarks

Enter your verification code

A verification code was sent via email to ivoronline@gmail.com. When you receive the code, enter it below.

Verify my code and log me in

Didn't receive the email?

Sometimes automated messages get categorized as spam. Check your spam folder.

[If you're still having trouble, click here to try again.](#)

2 Data Model

Info

- This chapter describes Salesforce functionality which allows you to create data model.
- Data Model only describes how data should be organized but it doesn't not actually contain any specific data.

2.1 Custom Objects

Info

- Custom Objects are Objects created by user.
- They are used to expand basic Salesforce functionality provided by Standard Objects which are already part of Salesforce.

Custom vs Standard Object

- Custom Objects can be created or deleted, unlike Standard Objects.
- Custom Objects can't use all the functionality that exists for some Standard Objects, like for example composite fields.

2.1.1 View list of Custom Objects

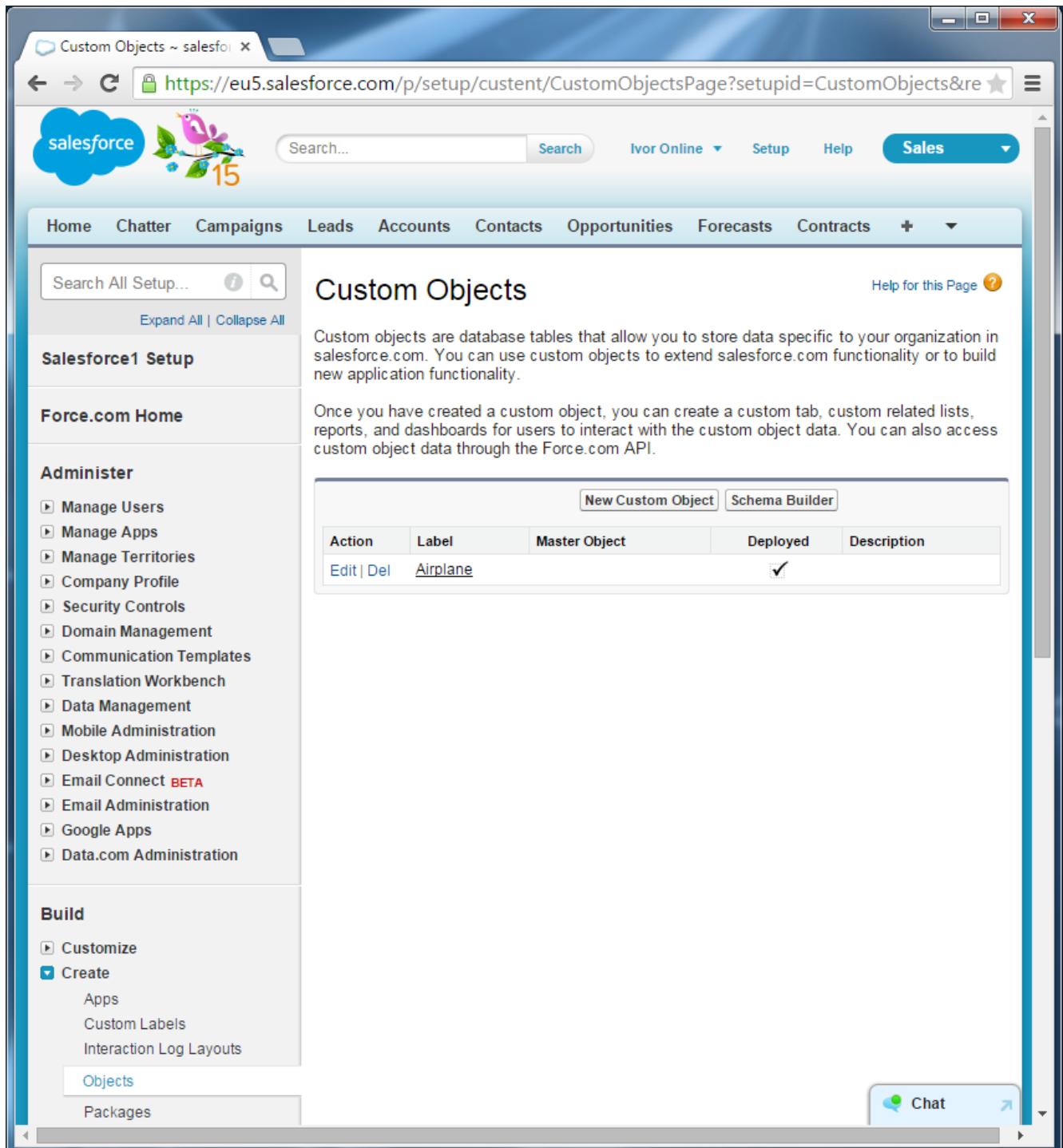
Info

- This chapter shows how to view list of Custom Objects.

View list of Custom Objects

- Login
- Setup
- Build
- Create
- Objects

List of Custom Objects



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

- Page Title:** Custom Objects ~ salesfo
- URL:** <https://eu5.salesforce.com/p/setup/custent/CustomObjectsPage?setupid=CustomObjects&re>
- Header:** salesforce, 15, Search..., Search, Ivor Online, Setup, Help, Sales
- Top Navigation:** Home, Chatter, Campaigns, Leads, Accounts, Contacts, Opportunities, Forecasts, Contracts, +
- Left Sidebar:**
 - Search All Setup...
 - Salesforce1 Setup
 - Force.com Home
 - Administer
 - Manage Users
 - Manage Apps
 - Manage Territories
 - Company Profile
 - Security Controls
 - Domain Management
 - Communication Templates
 - Translation Workbench
 - Data Management
 - Mobile Administration
 - Desktop Administration
 - Email Connect BETA
 - Email Administration
 - Google Apps
 - Data.com Administration
 - Build
 - Customize
 - Create** (selected)
 - Apps
 - Custom Labels
 - Interaction Log Layouts
 - Objects
 - Packages

- Content Area:**

Custom Objects

Custom objects are database tables that allow you to store data specific to your organization in salesforce.com. You can use custom objects to extend salesforce.com functionality or to build new application functionality.

Once you have created a custom object, you can create a custom tab, custom related lists, reports, and dashboards for users to interact with the custom object data. You can also access custom object data through the Force.com API.

Action	Label	Master Object	Deployed	Description
Edit Del	Airplane		✓	

2.1.2 Create Custom Object

Info

- This chapter shows how to create Custom Object.

Create Custom Object

— [View list of Custom Objects](#)

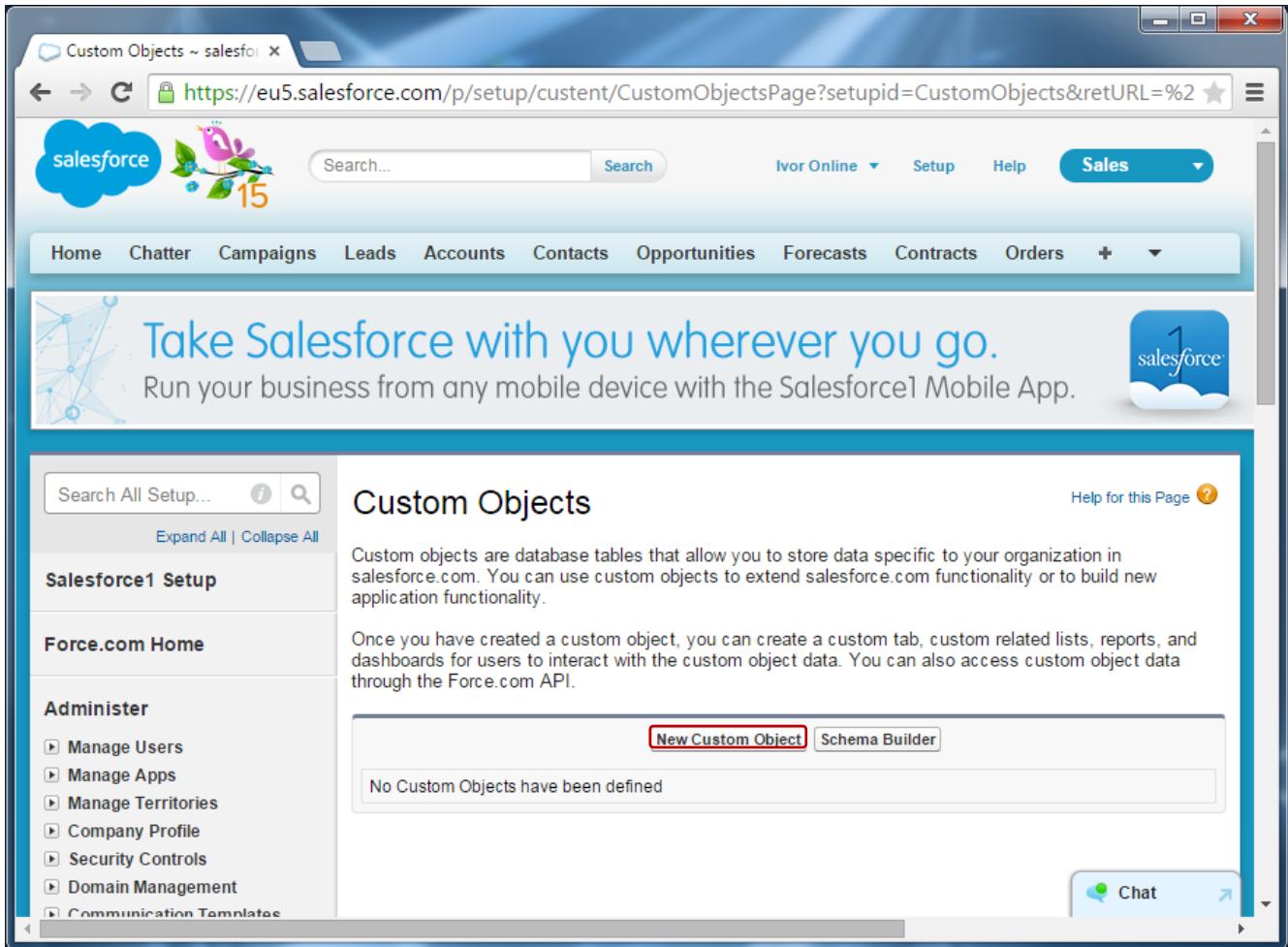
— [New Custom Object](#)

— Label: Airplane

— Plural Label: Airplane

— Save

List of Custom Objects



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

- Page Title:** Custom Objects ~ salesfo
- URL:** https://eu5.salesforce.com/p/setup/custent/CustomObjectsPage?setupid=CustomObjects&retURL=%20
- Header:** salesforce, Search bar, Ivor Online, Setup, Help, Sales
- Top Navigation:** Home, Chatter, Campaigns, Leads, Accounts, Contacts, Opportunities, Forecasts, Contracts, Orders, +
- Hero Section:** "Take Salesforce with you wherever you go. Run your business from any mobile device with the Salesforce1 Mobile App." with a Salesforce1 icon.
- Left Sidebar:** Search All Setup..., Expand All | Collapse All, Salesforce1 Setup, Force.com Home, Administer
 - Manage Users
 - Manage Apps
 - Manage Territories
 - Company Profile
 - Security Controls
 - Domain Management
 - Communication Templates
- Content Area:**

Custom Objects

Custom objects are database tables that allow you to store data specific to your organization in salesforce.com. You can use custom objects to extend salesforce.com functionality or to build new application functionality.

Once you have created a custom object, you can create a custom tab, custom related lists, reports, and dashboards for users to interact with the custom object data. You can also access custom object data through the Force.com API.

[New Custom Object](#) [Schema Builder](#)

No Custom Objects have been defined

Chat

Edit Screen

Salesforce 15

https://eu5.salesforce.com/01I24000000txC4/e?setupid=CustomObjects&retURL=%2Fp%2Fsetup%2Fcustom%2Fcustom

Search... Search

Ivor Online ▾ Setup Help Sales

Home Chatter Campaigns Leads Accounts Contacts Opportunities Forecasts Contracts Orders Cases Solutions + ▾

Search All Setup... Expand All Collapse All

Edit Custom Object Airplane

Help for this Page ?

Custom Object Definition Edit

Custom Object Information ! = Required Information

The singular and plural labels are used in tabs, page layouts, and reports.
Be careful when changing the name or label as it may affect existing integrations and merge templates.

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

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name **Example:** Account Name

Data Type

Optional Features

Allow Reports
 Allow Activities
 Track Field History

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

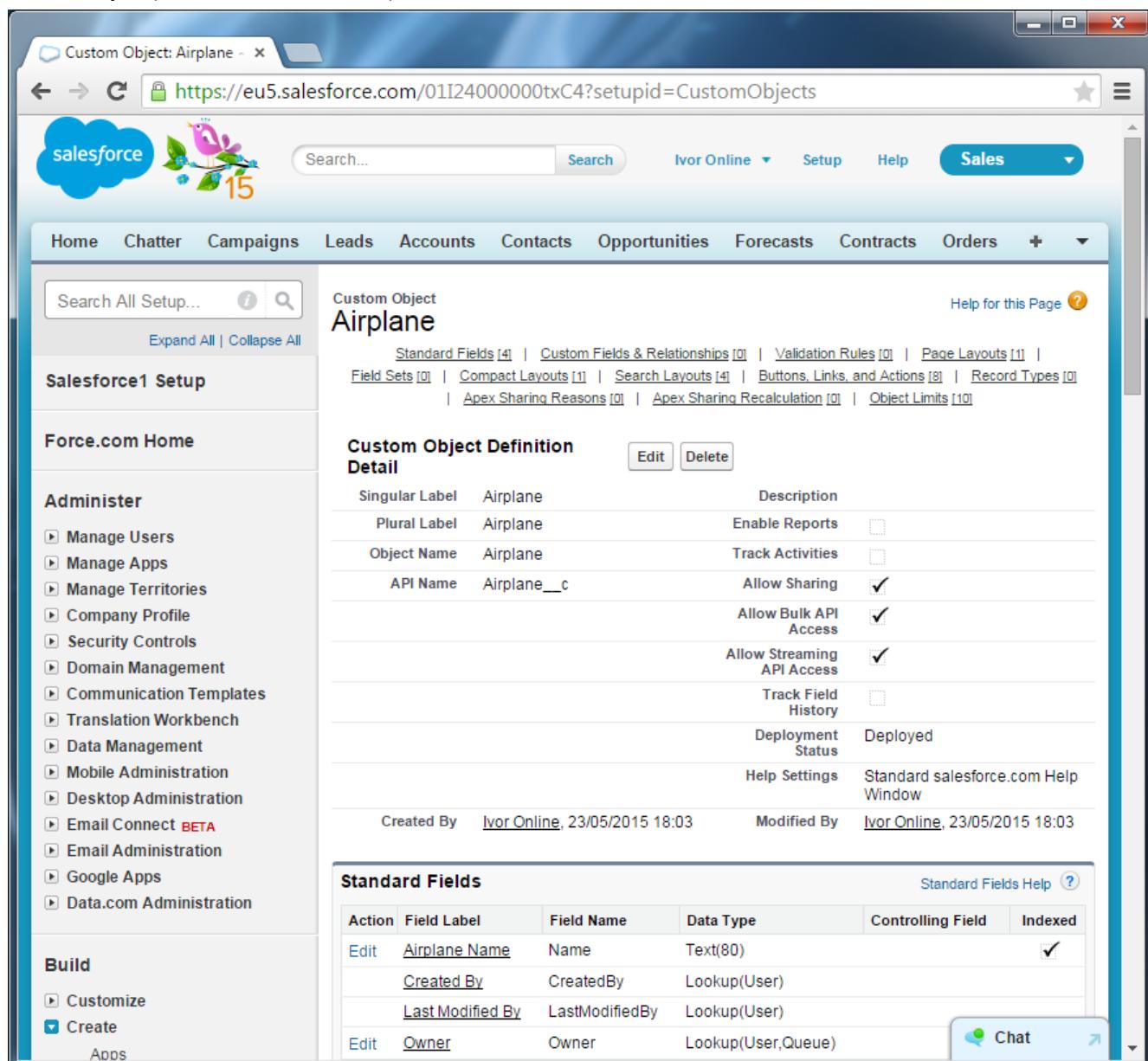
Deployment Status

[What is this?](#)

In Development
 Deployed

Save Save & New Cancel Chat

Created Object (Contains Standard Fields)



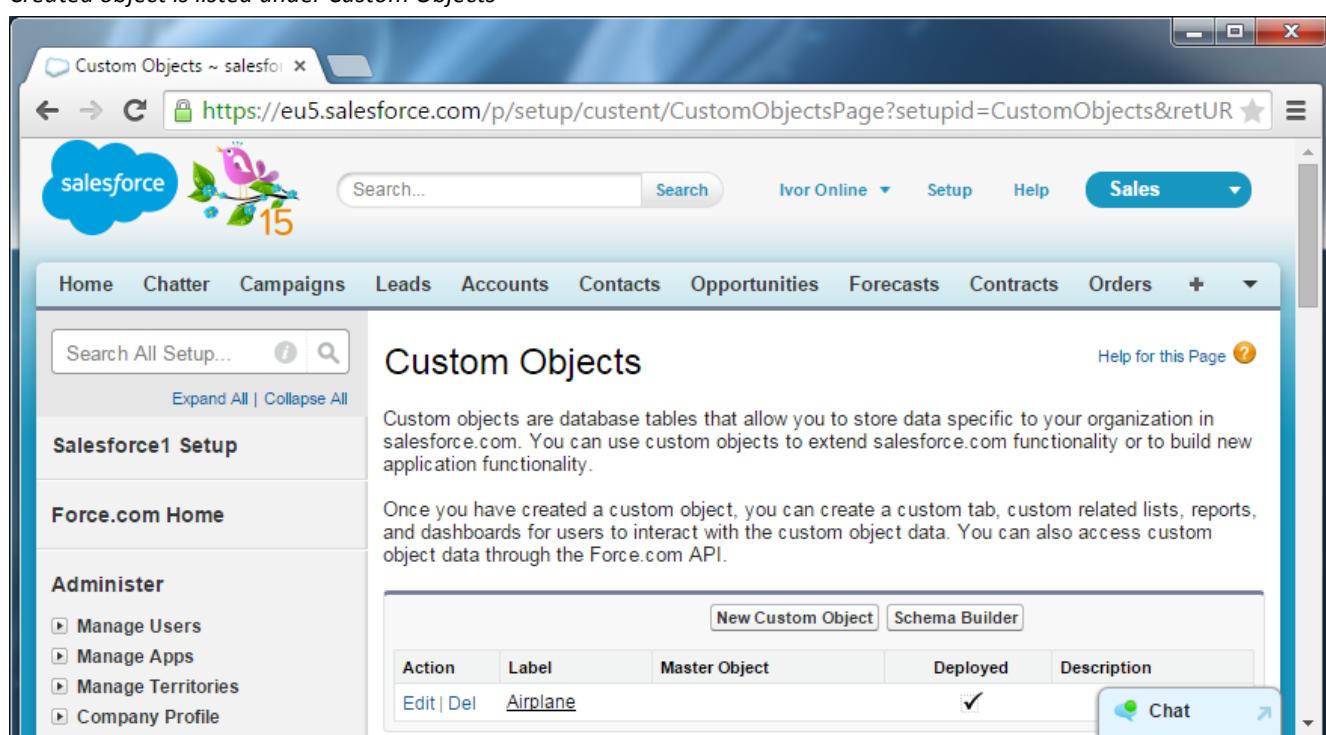
The screenshot shows the Salesforce Setup interface. On the left, a sidebar lists 'Salesforce1 Setup' and 'Force.com Home' sections. The main content area is titled 'Custom Object Definition Detail' for 'Airplane'. It shows the following configuration:

Singular Label	Airplane	Description
Plural Label	Airplane	Enable Reports <input type="checkbox"/>
Object Name	Airplane	Track Activities <input type="checkbox"/>
API Name	Airplane__c	Allow Sharing <input checked="" type="checkbox"/>
		Allow Bulk API Access <input checked="" type="checkbox"/>
		Allow Streaming API Access <input checked="" type="checkbox"/>
		Track Field History <input type="checkbox"/>
		Deployment Status Deployed
		Help Settings Standard salesforce.com Help Window

Below this, the 'Standard Fields' section lists the following fields:

Action	Field Label	Field Name	Data Type	Controlling Field	Indexed
Edit	Airplane Name	Name	Text(80)		<input checked="" type="checkbox"/>
	Created By	CreatedBy	Lookup(User)		
	Last Modified By	LastModifiedBy	Lookup(User)		
Edit	Owner	Owner	Lookup(User,Queue)		

Created object is listed under Custom Objects



The screenshot shows the 'Custom Objects' page. The sidebar includes 'Salesforce1 Setup' and 'Force.com Home' sections. The main content area is titled 'Custom Objects' and contains the following text:

Custom objects are database tables that allow you to store data specific to your organization in salesforce.com. You can use custom objects to extend salesforce.com functionality or to build new application functionality.

Once you have created a custom object, you can create a custom tab, custom related lists, reports, and dashboards for users to interact with the custom object data. You can also access custom object data through the Force.com API.

At the bottom, there is a table with a single row for the 'Airplane' object:

Action	Label	Master Object	Deployed	Description
Edit Del	Airplane		<input checked="" type="checkbox"/>	

2.1.3 Edit Custom Object

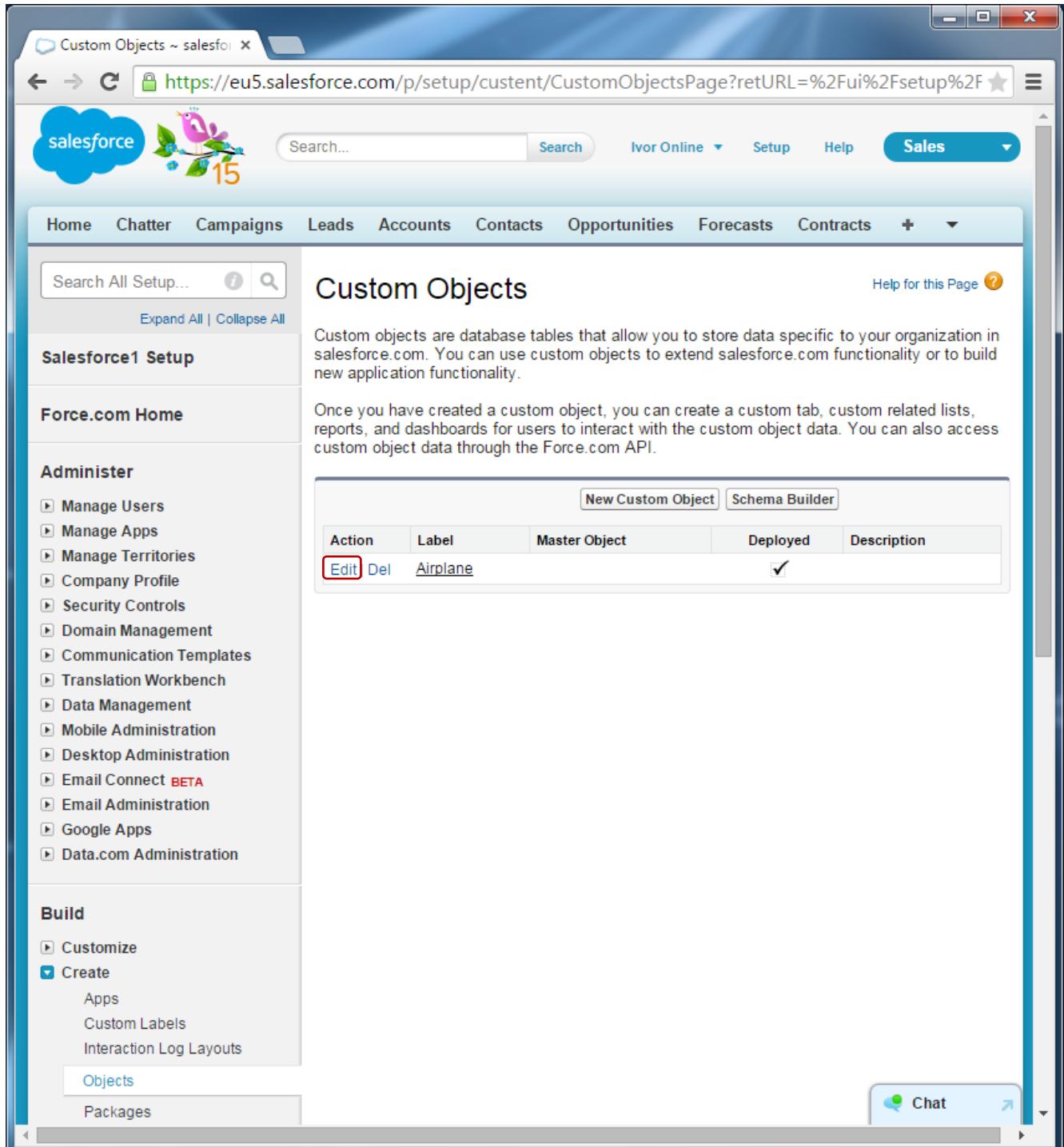
Info

- This chapter shows how to edit Custom Object.

Edit Custom Object

- View list of Custom Objects
- (Click on Edit left from Object you want to delete)
- (Change data)
- Save

List of Custom Objects



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

- Page Title:** Custom Objects ~ salesfo
- URL:** https://eu5.salesforce.com/p/setup/custent/CustomObjectsPage?retURL=%2Fui%2Fsetup%2F
- Header:** salesforce, 15, Search..., Search, Ivor Online, Setup, Help, Sales
- Left Sidebar:** Home, Chatter, Campaigns, Leads, Accounts, Contacts, Opportunities, Forecasts, Contracts, +, ▾
- Search Bar:** Search All Setup..., Expand All | Collapse All
- Section:** Salesforce1 Setup
- Section:** Force.com Home
- Section:** Administer
 - Manage Users
 - Manage Apps
 - Manage Territories
 - Company Profile
 - Security Controls
 - Domain Management
 - Communication Templates
 - Translation Workbench
 - Data Management
 - Mobile Administration
 - Desktop Administration
 - Email Connect BETA
 - Email Administration
 - Google Apps
 - Data.com Administration
- Section:** Build
 - Customize
 - Create** (selected)
 - Apps
 - Custom Labels
 - Interaction Log Layouts
 - Objects
 - Packages
- Content Area:**

Custom Objects

Custom objects are database tables that allow you to store data specific to your organization in salesforce.com. You can use custom objects to extend salesforce.com functionality or to build new application functionality.

Once you have created a custom object, you can create a custom tab, custom related lists, reports, and dashboards for users to interact with the custom object data. You can also access custom object data through the Force.com API.

Action	Label	Master Object	Deployed	Description
Edit	Del	Airplane	✓	

Edit Screen (It is the same as when you are creating new Object)

The screenshot shows the Salesforce 'Edit Custom Object' screen for 'Airplane'. The URL is <https://eu5.salesforce.com/01I24000000txC4/e?setupid=CustomObjects&retURL=%2Fp%2Fsetup%2Fcustom%2Fcustom>. The page title is 'Edit Custom Object: Airplane'. The left sidebar shows the 'Salesforce1 Setup' section with 'Custom Objects' selected. The main content area shows the 'Custom Object Definition Edit' screen for 'Airplane'. The 'Custom Object Information' section includes fields for 'Label' (Airplane), 'Plural Label' (Airplane), and 'Starts with vowel sound' (unchecked). The 'Object Name' field is set to 'Airplane'. The 'Description' field is empty. Under 'Context-Sensitive Help Setting', the 'Open the standard Salesforce.com Help & Training window' radio button is selected. The 'Content Name' dropdown is set to 'None'. The 'Enter Record Name Label and Format' section shows 'Record Name' as 'Airplane Name' and 'Data Type' as 'Text'. The 'Optional Features' section includes checkboxes for 'Allow Reports', 'Allow Activities', and 'Track Field History', all of which are unchecked. The 'Object Classification' section notes that the object is classified as an Enterprise Application object. The 'Deployment Status' section shows 'In Development' as the selected option. At the bottom are 'Save', 'Save & New', and 'Cancel' buttons, and a 'Chat' button.

Custom Object Definition Edit

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports.
Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label: Airplane Example: Account

Plural Label: Airplane Example: Accounts

Starts with vowel sound:

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

Object Name: Airplane Example: Account

Description:

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

Content Name:

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name: Airplane Name Example: Account Name

Data Type: Text

Optional Features

Allow Reports:

Allow Activities:

Track Field History:

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

Save Save & New Cancel Chat

2.1.4 Delete Custom Object

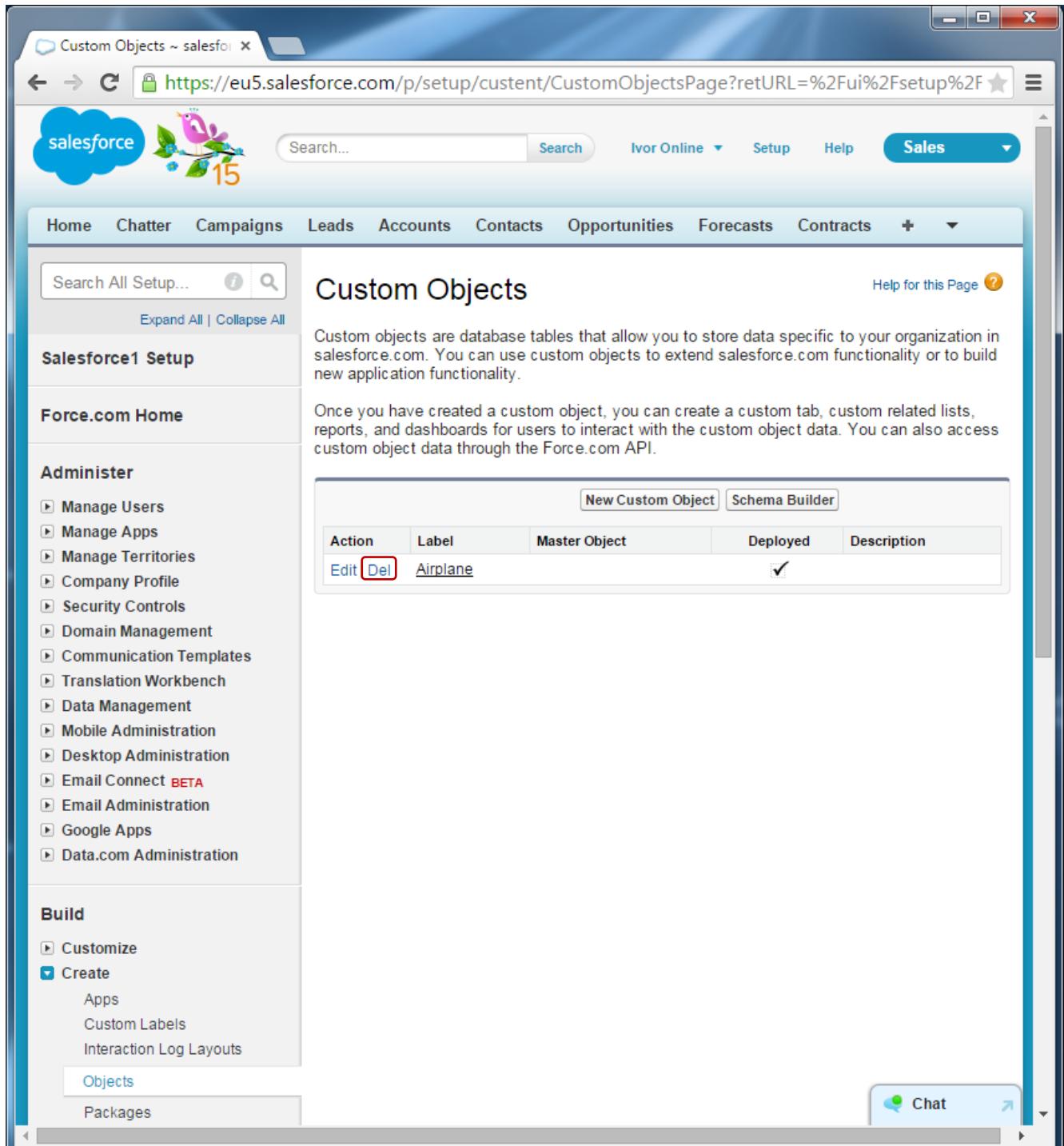
Info

- This chapter shows how to delete Custom Object.

Delete Custom Object

- [View list of Custom Objects](#)
- (Click on Del left from Object you want to delete)
- Yes, I want to delete the custom object.: CHECK
- Delete

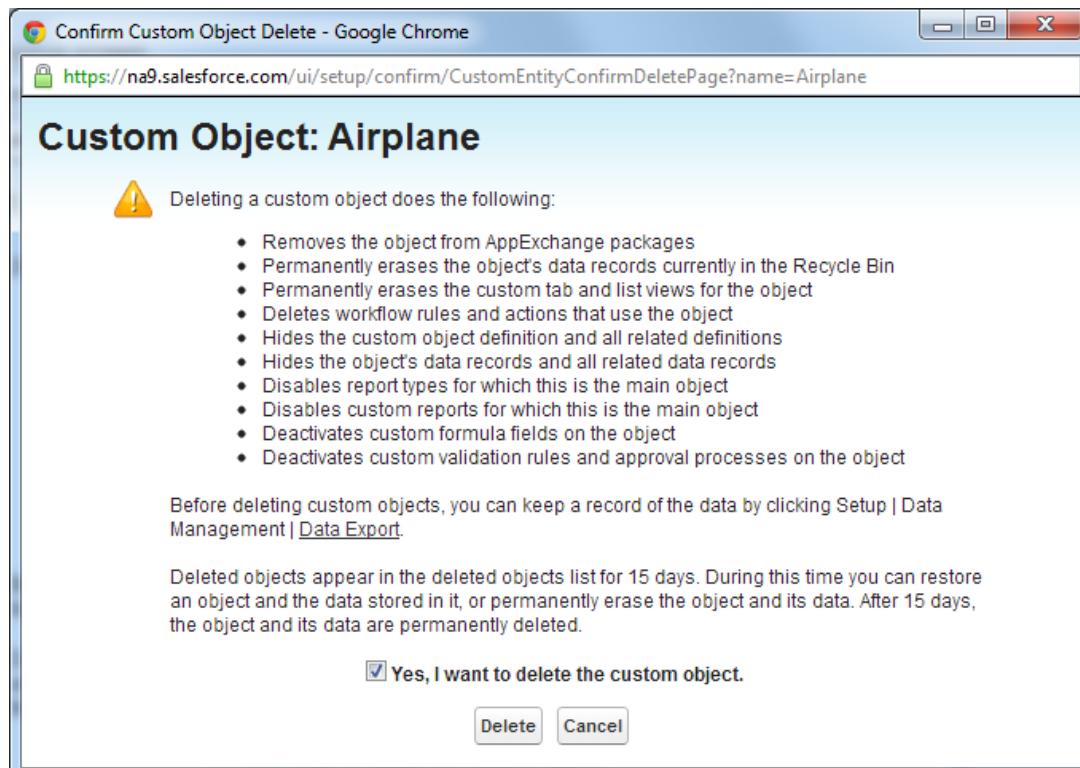
List of Custom Objects



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- Header:** salesforce, 15, Search..., Search, Ivor Online, Setup, Help, Sales
- Left Sidebar:**
 - Home, Chatter, Campaigns, Leads, Accounts, Contacts, Opportunities, Forecasts, Contracts, +, ▾
 - Search All Setup..., Expand All | Collapse All
 - Salesforce1 Setup**
 - Force.com Home**
 - Administer**
 - Manage Users, Manage Apps, Manage Territories, Company Profile, Security Controls, Domain Management, Communication Templates, Translation Workbench, Data Management, Mobile Administration, Desktop Administration, Email Connect BETA, Email Administration, Google Apps, Data.com Administration
 - Build**
 - Customize, **Create**
 - Apps, Custom Labels, Interaction Log Layouts
 - Objects
 - Packages
- Content Area:**
 - Custom Objects** (Section Header)
 - Help for this Page ?
 - Custom objects are database tables that allow you to store data specific to your organization in salesforce.com. You can use custom objects to extend salesforce.com functionality or to build new application functionality.
 - Once you have created a custom object, you can create a custom tab, custom related lists, reports, and dashboards for users to interact with the custom object data. You can also access custom object data through the Force.com API.
 - | Action | Label | Master Object | Deployed | Description |
|-----------------|----------|---------------|----------|-------------|
| Edit Del | Airplane | | ✓ | |

Confirmation popup screen



2.2 Fields

Info

- Fields are parts of Object used to hold data.
- When you create Record of certain Object you use fields to hold data specific for that Record.
- Additional info can be found at [Custom Field Attributes](#).

Standard & Custom Fields

Standard Fields

- Can't be deleted.
- Can be removed from view.
- Only some standard fields can be renamed.
- Following standard Fields are automatically created with each new Object ([Defining Custom Object Fields](#))
 - ID – Unique ID of the record.
 - Name – Identifier for the custom object record.
 - Owner – Assigned owner of the custom object record.
 - Created By – User who created the record.
 - Created Date – Date when record was created.
 - Last Modified By – User who most recently changed the record.
 - Last Modified Date – Date when record was most recently changed.
 - Division – Division to which the custom object record belongs
 - Currency – Currency of the record if multicurrency is enabled.

Custom Fields

- Fields created by a user.
- Deleted custom fields can be restored by admin inside first 15 days after deletion.

External ID

- External ID Fields are used instead of Lookup fields to reference data which is in an external system outside Salesforce.
- For External ID Fields it is optional to make them unique.
- Each Object can have maximum of 3 External ID Fields.
- Only Fields of following Field types can be flagged as External IDs
 - Auto Number
 - Number
 - Email
 - Text
- When upserting records using External ID
 - If multiple matched records are found, an error is reported
 - If single matched record is found, record is updated
 - If no matched record is found, a new record is created

Required Fields

[R]

- Required field is a custom field that must have a value whenever a record is saved.
- Required Fields are always displayed on all page layouts.
- Required fields may be blank on records that existed before making the field required.
- When user updates record with a blank required field, value must be entered in the required field before saving record.
- Field can be made required using
 - Checkbox on a Field
 - Page Layout
 - Validation Rule

Record ID

- Record ID is alpha-numeric field which uniquely identifies a record.
- The first three characters represent an object type
- There are two types of Record IDs
 - The 18 digit record ID is not case-sensitive.
 - The 15 digit record ID is case sensitive
- You can get Record ID by using
 - URL
 - Report
 - Web services API

Other Info

- When Changing Data Type there is a danger of losing data.
- The description is intended to describe the field to administrators and developers, and it does not appear to the end user.

2.2.1 Create Field

Info

- Each of the following chapters shows one of the steps you have to go through each time you want to create a new Field.
- Steps are identical for all the Field types except for the second step which is used to define specific Field attributes.

2.2.1.1 Show Custom Fields

Info

- This chapter shows how to show list of Fields belonging to specific Object.
Procedure differs between Standard and Custom objects as shown below.
- From there you can click on New button in order to create new field.
After that wizard will guide you through different setup pages depending on selected field type.

For Standard Object

- Setup
- Build
- Customize
- Accounts
- Fields (Displays Account fields)
- Section: Account Custom Fields & Relationships
- New

Account Custom Fields & Relationships						
		New	Field Dependencies		Account Custom Fields & Relationships Help	
Action	Field Label	API Name	Data Type	Indexed	Controlling Field	Modified By
Edit Del Replace	Active	Active__c	Picklist			Ivor Online, 23/05/2015 17:42
Edit Del Replace	Customer Priority	CustomerPriority__c	Picklist			Ivor Online, 23/05/2015 17:42
Edit Del	Number of Locations	NumberofLocations__c	Number(3, 0)			Ivor Online, 23/05/2015 17:42
Edit Del Replace	SLA	SLA__c	Picklist			Ivor Online, 23/05/2015 17:42
Edit Del	SLA Expiration Date	SLAExpirationDate__c	Date			Ivor Online, 23/05/2015 17:42
Edit Del	SLA Serial Number	SLASerialNumber__c	Text(10)			Ivor Online, 23/05/2015 17:42
Edit Del Replace	Upsell Opportunity	UpsellOpportunity__c	Picklist			Ivor Online, 23/05/2015 17:42

For Custom Object

- Setup
- Build
- Create
- Objects
- Employee
- Fields (Displays Object fields)
- Section: Custom Fields & Relationships
- New

Custom Fields & Relationships						
		New	Field Dependencies	Set History Tracking	Custom Fields & Relationships Help	
Action	Field Label	API Name	Data Type	Controlling Field	Modified By	Track History
Edit Del	Manager	Manager__c	Lookup(Employee)		Ivor Goreta, 03/07/2012 12:32	<input type="checkbox"/>
Edit Del	User	User__c	Lookup(User)		Ivor Goreta, 03/07/2012 14:47	<input type="checkbox"/>

2.2.1.2 Step 1. Choose Field Type

Info

- This chapter shows how to open "New Custom Field" page which is first step in creating new Field.
- On this page you choose type of the field which you want to create.
- After that wizard will guide you through different setup pages depending on selected field type.
- Accessing this page differs depending is Field is being added to Standard or Custom Object.

Procedure

- Show Object Fields
- New
- (Select Field Type)
- Next

Order Help for this Page 

New Custom Field

Step 1. Choose the field type Step 1

Next Cancel

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

Data Type

<input checked="" type="radio"/> None Selected	Select one of the data types below.
<input 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 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.
<input type="radio"/> Checkbox	Allows users to select a True (checked) or False (unchecked) value.

2.2.1.3 Step 2. Define Field Parameters

Info

- This chapter shows how to specify parameters for Picklist Field.
- This step will be different for each Field Types as shown in chapter [Field Types](#).

Procedure

- [Choose Field Type](#)
- [Define Field Parameters](#)
- [Establish field-level security](#)
- [Add to Page Layout](#)

Define Field Parameters

- Picklist: CHEK – Next
- Field Label: Sector
- Please enter the list of values for the picklist field below. Each value should be separated by a new line.
- Education
- Health
- Construction
- Sort values alphabetically, not in the order entered: CHECK
- Use first value as default value: CHECK
- Field Name: Sector
- Description: Choose company sector (Describes field to administrators and developers, not end user)
- Help Text: Choose company sector
- Next

Account Help for this Page ?

New Custom Field

Step 2. Enter the details Step 2 of 4

Previous Next Cancel

Field Label i

Please enter the list of values for the picklist field below. Each value should be separated by a new line.

i

Sort values alphabetically, not in the order entered. Values will be displayed alphabetically everywhere.

Use first value as default value

Field Name i

Description i

Help Text i

2.2.1.4 Step 3. Establish field-level security

Info

- After you select Field type and define Field parameters you have to setup FLS - Field Level Security for each Profile.
- This means that for each Profile you have to define if Field should be
 - Visible
 - Read-Only
- Checkboxes Visible & Read-Only allows you to select or deselect all of the Profiles at the same time.
- Selecting Read-Only for specific Profile will automatically select Visible checkbox for the same Profile. This means that for specific Profile Field can't be Read-Only without being Visible at the same time.

Account [Help for this Page](#) 

New Custom Field

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

Previous Next Cancel

Field Label	Sector
Data Type	Picklist
Field Name	Sector
Description	Choose company sector

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

Field-Level Security for Profile	<input checked="" type="checkbox"/> Visible	<input type="checkbox"/> Read-Only
Authenticated Website	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<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"/>
Customer Portal Manager Custom	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Customer Portal Manager Standard	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Force.com - Free User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Gold Partner User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
High Volume Customer Portal	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Marketing User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Read Only	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Silver Partner User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Solution Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Standard Platform User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Standard User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
System Administrator	<input checked="" type="checkbox"/>	<input type="checkbox"/>

2.2.1.5 Step 4. Add to Page Layout

Info

- After you select Field type, define Field parameters and setup FLS - Field Level Security for each Profile you have to define to which Page Layouts Field will be added.
- By default Field is added to each Page Layout but it can be excluded by unchecking a checkbox.
- Add Field checkbox adds or removes Field from all the Page Layouts by checking or unchecking all the other checkboxes.

Account Help for this Page 

New Custom Field

Step 4. Add to page layouts Step 4 of 4

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

Field Label	Sector
Data Type	Picklist
Field Name	Sector
Description	Choose company sector

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.

<input checked="" type="checkbox"/> Add Field	Page Layout Name
<input type="checkbox"/>	Account (Marketing) Layout
<input checked="" type="checkbox"/>	Account (Sales) Layout
<input checked="" type="checkbox"/>	Account (Support) Layout
<input type="checkbox"/>	Account Layout

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

2.2.2 Field Types

Info

- Each of the following chapters describes one of possible field types and how to create it.
- Creating procedure is the same for all field types only except for the step 2 which is used to define field attributes.

Possible Field Types

Employee Help for this Page 

New Custom Field

Step 1. Choose the field type Step 1

Next  Cancel

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

Data Type

None Selected Select one of the data types below.

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

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

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

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

Master-Detail Relationship Creates a 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.

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

Currency Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

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

Date/Time Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the popup, 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 (Beta) Allows users to define locations.

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

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

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

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

Picklist (Multi-Select) Allows users to select multiple values from a list you define.

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

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

Text Area (Long) Allows users to enter up to 32,768 characters on separate lines.

Text Area (Rich) Allows users to enter formatted text, add images and links. Up to 32,768 characters on separate lines.

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

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

2.2.2.1 Auto Number

Info

- This chapter shows how to create Auto Number Field.

Procedure

- Show Object Fields
- Choose Field Type: Auto Number
- Enter the details (As defined below in this chapter)
- Establish field-level security
- Add to Page Layout

Enter the details

- Field Label: MyAutoNumber
- Display Format: A-{0000}
- Starting Number: 1
- Generate Auto Number for existing records: UNCHECK
- Field Name: MyAutoNumber
- Description: MyAutoNumber Field Description
- Help Text: MyAutoNumber Help
- External ID: CHECK (Set this field as the unique record identifier from an external system)
- Next

Account Help for this Page ?

New Custom Field

Step 2. Enter the details Step 2 of 4

Previous Next Cancel

Field Label	MyAutoNumber i
Display Format	A-{0000} Example: A-{0000} What Is This?
Starting Number	1
<input type="checkbox"/> Generate Auto Number for existing records	
Field Name	MyAutoNumber i
Description	MyAutoNumber Field Description
Help Text	MyAutoNumber Help i
External ID	<input checked="" type="checkbox"/> Set this field as the unique record identifier from an external system

2.2.2.2 Formula

Info

- This chapter shows how to create Formula Field.
- Normal Formula Field calculates values using fields within a single record.
- Cross Object Formula Field can reference fields on parent or grandparent object, up to 5 levels.

Restrictions

- You can't delete fields used in formulas.
- They ignore field-level security settings of the source fields.

Procedure

- Show Object Fields
- Choose Field Type: Formula
- Choose output type (As defined below in this chapter)
- Enter formula (As defined below in this chapter)
- Establish field-level security
- Add to Page Layout

Choose output type

- Field Label: MyFormula
- Field Name: MyFormula
- Description: MyFormula Field Description
- Help Text: MyFormula Help
- Next

Account Help for this Page

New Custom Field

Step 2. Choose output type Step 2 of 5

Previous Next Cancel

Field Label	MyFormula	Field Name	MyFormula	i
-------------	-----------	------------	-----------	-------------------

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: `Gross Margin = Amount - Cost_c`

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

Date/Time Calculate a date/time, for example, by adding a number of hours or days to another date/time.
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`

Options

Decimal Places Example: 999.00

Enter formula

- MyFormula (Number) = 12 (Constant value is used)
- Description: OppsRollUp to Case Object
- Help Text: OppsRollUp to Case Object
- Next

Account [Help for this Page ?](#)

New Custom Field

Step 3. Enter formula **Step 3 of 5**

Previous Next Cancel

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 + 32` [More Examples...](#)

[Simple Formula](#) [Advanced Formula](#)

Select Field Type **Insert Field**

Account **Insert Operator ▾**

MyFormula (Number) =

```
12
```

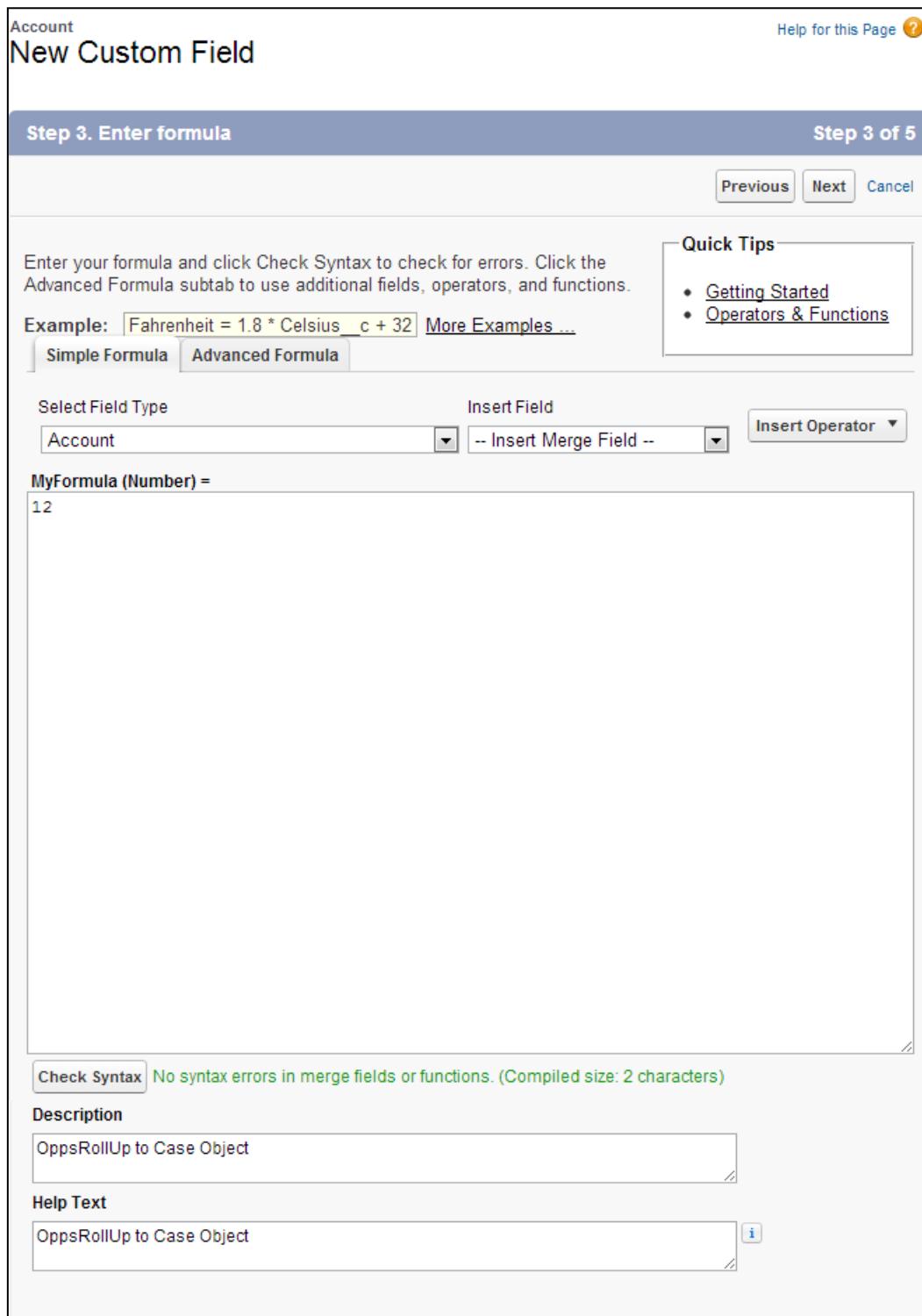
Check Syntax No syntax errors in merge fields or functions. (Compiled size: 2 characters)

Description

OppsRollUp to Case Object

Help Text

OppsRollUp to Case Object [i](#)



2.2.2.3 Roll-Up Summary

Info

[R]

- This chapter shows how to create Roll-Up Summary Field.
- Roll-Up Summary Field calculates values from a set of related child records in a master-detail relationship.
- Roll-Up Summary Field is calculated when the related object record is created or updated.
- 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.

Procedure

- Show Object Fields
- Choose Field Type: Roll-Up Summary
- Enter the details (As defined below in this chapter)
- Define the summary calculation (As defined below in this chapter)
- Establish field-level security
- Add to Page Layout

Enter the details

- Field Label: Equipment Roll-Up Summary
- Field Name: Equipment_Roll_Up_Summary
- Description: Description of Equipment Roll-Up Summary
- Help Text: Help on Equipment Roll-Up Summary
- Next

Employee Help for this Page ?

New Custom Field

Step 2. Enter the details Step 2 of 5

Previous Next Cancel

Field Label	Equipment Roll-Up Summ i
Field Name	Equipment_Roll_Up_Sum i
Description	Description of Equipment Roll-Up Summary
Help Text	Help on Equipment Roll-Up Summary i

Define the summary calculation

- Master Object: Equipment
- Summarized Object: Opportunities
- COUNT: CHECK**
- Field to Aggregate: Amount
- All records should be included in the calculation: UNCHECK
- Only records meeting certain criteria should be included in the calculation: CHECK
- Created Date greater than 01/01/2000
- Next

Employee Help for this Page 

New Custom Field

Step 3. Define the summary calculation Step 3 of 5

Select Object to Summarize = Required Information

Master Object Employee
Summarized Object

Select Roll-Up Type

COUNT SUM MIN MAX Field to Aggregate

Filter Criteria

All records should be included in the calculation
 Only records meeting certain criteria should be included in the calculation

Field	Operator	Value	Logic
Created Date	greater than	01/01/2000	AND
--None--	--None--		

For checkbox fields, enter a value of True for checked or False for not checked. For picklist fields, enter the master picklist field value in your corporate language.

Test

- Tab: Employees
- Employee Ivor (Equipment Roll-Up Summary should contain number of equipment referencing this Employee)

Employee Customize Page | Edit Layout | Printable View | Help for this Page

Employee_Ivor

[« Back to List: Custom Object Definitions](#)

[Open Activities \[0\]](#) | [Activity History \[0\]](#) | [Notes & Attachments \[0\]](#) | [Leave Requests \[1\]](#) | [Employees \[0\]](#) **[Equipment \[1\]](#)**

Employee Detail Edit Delete Clone Sharing

Employee Name	Employee_Ivor	Owner	Ivor Goreta [Change]
Manager	Employee Manager		
User	Ivor Goreta		
City			
Age			
First Name			
Last Name			
Equipment Roll-Up 1		Summary 	
Created By	Ivor Goreta, 03/07/2012 21:27	Last Modified By	Ivor Goreta, 03/07/2012 21:27

2.2.2.4 Lookup Relationship

Info

- This chapter shows how to create Lookup Relationship Field.
- Lookup Field is used to reference another record belonging to some specific Object.
- Dependent Lookup: Use lookup filer that references another field on the same object.

Procedure

- Show Object Fields
- Choose Field Type: Lookup Relationship
- Choose the related object (As defined below in this chapter)
- Enter the label and name for lookup field (As defined below in this chapter)
- Add custom related lists (As defined below in this chapter)
- Establish field-level security
- Add to Page Layout

Choose the related object

- Related To: Case
- Next

Order Help for this Page 

New Relationship

Step 2. Choose the related object Step 2

Previous Next Cancel

Select the other object to which this object is related.

Related To Case ▼



Enter the label and name for lookup field

- Field Label: MyCase
- Field Name: MyCase
- Description: Lookup to Case Object Description
- Help Text: Lookup to Case Object Help
- Child Relationship Name: MyAccounts
- Required: CHECK (Always require a value in this field in order to save a record)
- What to do if the lookup record is deleted?
 - Clear the value of this field. You can't choose this option if you make this field required.: CHECK
 - Don't allow deletion of the lookup record that's part of a lookup relationship.: UNCHECK
- Next

Account Help for this Page

New Relationship

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

Field Label i

Field Name i

Description

Help Text i

Child Relationship Name i

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

What to do if the lookup record is deleted?
 Clear the value of this field. You can't choose this option if you make this field required.
 Don't allow deletion of the lookup record that's part of a lookup relationship.

Add custom related lists

- Related List Label: MyAccounts
- Save

Account Help for this Page

New Relationship

Step 6. Add custom related lists Step 6 of 6

Field Label MyCase

Data Type Lookup

Field Name MyCase

Description Lookup to Case Object Description

Specify the title that the related list will have in all of the layouts associated with the parent.

Related List Label

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

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

Add Related List	Page Layout Name
<input checked="" type="checkbox"/>	Case (Marketing) Layout
<input checked="" type="checkbox"/>	Case (Sales) Layout
<input checked="" type="checkbox"/>	Case (Support) Layout
<input checked="" type="checkbox"/>	Case Layout

Append related list to users' existing personal customizations

Test

Create Case

- Tab: Cases
- New
- Record Type of new record: Default
- Continue
- Contact Name: Ivor Online
- Case Origin: Phone
- Save

Create Account

- Tab: Accounts
- New
- Account Name: TestAccount
- MyCase: 00001016
- Save

Account Edit Help for this Page ?

New Account

Account Edit Save Save & New Cancel

Account Information = Required Information

Account Owner	Ivor Goreta	Rating	--None--
Account Name	<input type="text" value="TestAccount"/>	Phone	<input type="text"/>
Parent Account	<input type="text"/>	Fax	<input type="text"/>
Account Number	<input type="text"/>	Website	<input type="text"/>
Account Site	<input type="text"/>	Ticker Symbol	<input type="text"/>
Type	--None--	Ownership	--None--
Industry	--None--	Employees	<input type="text"/>
Annual Revenue	<input type="text"/>	SIC Code	<input type="text"/>
Sector	Construction		
Products	--None--		
MyCase	00001016		

Search for A case ~ salesforce.com - Developer Edition - Google Chrome

https://na9.salesforce.com/_ui/common/data/LookupPage?lkfm=editPage&lknm=CF00NE0000004mfFW&lktp=500&lksr

Lookup

Case Number Go!

You can use '*' as a wildcard next to other characters to improve your search results.

Recently Viewed Cases

Case Number	Subject	Contact Name	Account Name	Status
00001002	Seeking guidance on electrical wiring installation for GC5060	Stella Pavlova	United Oil & Gas Corp.	Closed
00001016	Maintenance guidelines for generator unclear	Edna Frank	GenePoint	New
00001026	Orchestrator Create Case			Working
00001027	Orchestrator Create Case			Closed
00001028	Orchestrator Create Case			Closed

Show Accounts referencing specific Case record

- Tab: Cases
- 00001016
- (Hover over link to related list MyAccounts to show popup with all the Accounts referencing this Case Record)
- (Click on a link to related list MyAccounts to get to the list of Accounts referencing this Case Record)

Case
00001016

Customize Page | Edit Layout | Printable View | Help for this Page

Hide Feed

Post File Link Poll

Write something... Share

Follow

Show: All Updates ▾ Sort by: Most Recent Activity ▾

No followers.

There are no updates.

« Back to List: Accounts

Solutions [0] | Open Activities [0] | Activity History [0] | Case Comments [0] | Attachments [0] | Case History [0] | MyAccounts [1]

MyAccounts New Account MyAccounts Help ?

Action	Account Name	Billing City	Phone
Edit Del	<u>TestAccount</u>		
Contact Name	Euan Frank	Contact Phone	(030) 807-5450
Account Name	GenePoint	Contact Email	efrank@genepoint.com
Type	Other	Case Origin	Web

MyAccounts New Account MyAccounts Help ?

Action	Account Name	Billing City	Phone
Edit Del	<u>TestAccount</u>		

2.2.2.5 Master-Detail Relationship

Info

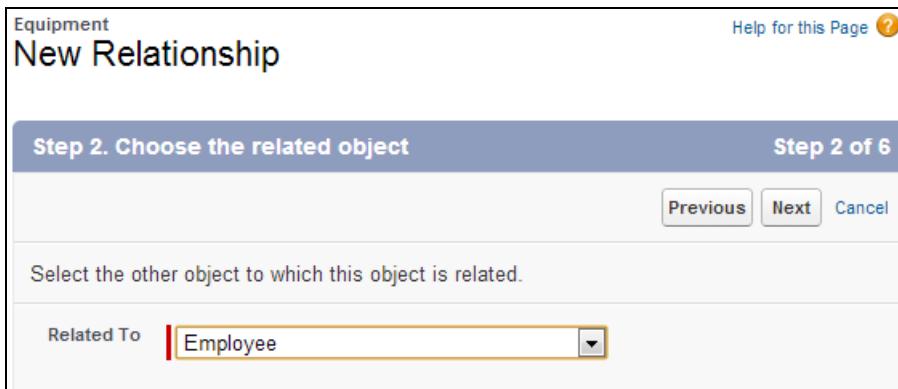
- This chapter shows how to create Master-Detail Relationship Field.
- Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:
 - The relationship field is required on all detail records.
 - The ownership and 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.

Procedure

- Show Object Fields
- Choose Field Type: Master-Detail Relationship
- Choose the related object (As defined below in this chapter)
- Enter the label and name for lookup field (As defined below in this chapter)
- Add custom related lists (As defined below in this chapter)
- Establish field-level security
- Add to Page Layout

Choose the related object

- Related To: Employee
- Next



The screenshot shows a step in the 'New Relationship' wizard. The title bar says 'Equipment' and 'New Relationship'. The top right has a 'Help for this Page' link. The main title is 'Step 2. Choose the related object' and it says 'Step 2 of 6'. Below that are 'Previous', 'Next', and 'Cancel' buttons. The instructions say 'Select the other object to which this object is related.' The 'Related To' field is highlighted with a yellow border and contains the value 'Employee'. There is a dropdown arrow next to the field.

Enter the label and name for lookup field

- Field Label: Employee
- Field Name: Employee
- Description: This field allows you to reference Employee record
- Help Text: Help for Lookup to Employee Object
- Child Relationship Name: Equipment
- Sharing Setting: Read/Write
- Next

Equipment Help for this Page

New Relationship

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

Field Label i

Field Name i

Description

Help Text i

Child Relationship Name i

Sharing Setting Select the minimum access level required on the Master record to create, edit, or delete related Detail records:
 Read Only: Allows users with at least Read access to the Master record to create, edit, or delete related Detail records.
 Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.

Allow reparenting Child records can be reparented to other parent records after they are created

Lookup Filter

Optionally, create a filter to limit the records available to users in the lookup field. [Tell me more!](#)

[Show Filter Settings](#)

Add custom related lists

- Related List Label: Equipment
- Save

Equipment Help for this Page

New Relationship

Step 6. Add custom related lists Step 6 of 6

Field Label Employee

Data Type Master-Detail

Field Name Employee

Description This field allows you to reference Employee record

Specify the title that the related list will have in all of the layouts associated with the parent.

Related List Label

These are the page layouts that will include this field. Because this is a Master-Detail relationship, the field is required.

Add Related List Page Layout Name

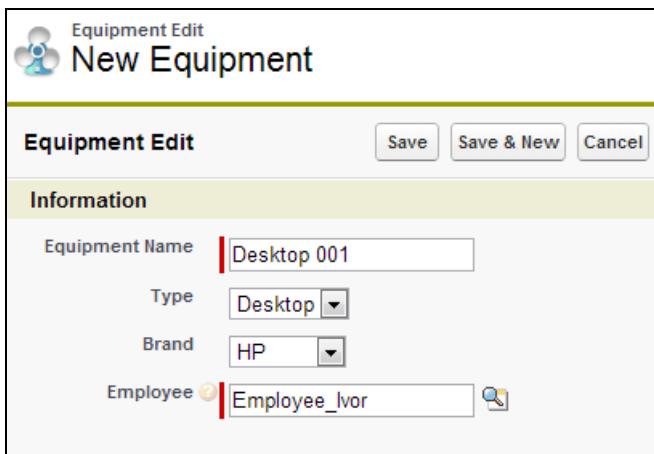
Employee Layout

Append related list to users' existing personal customizations

Test

Create Equipment Record

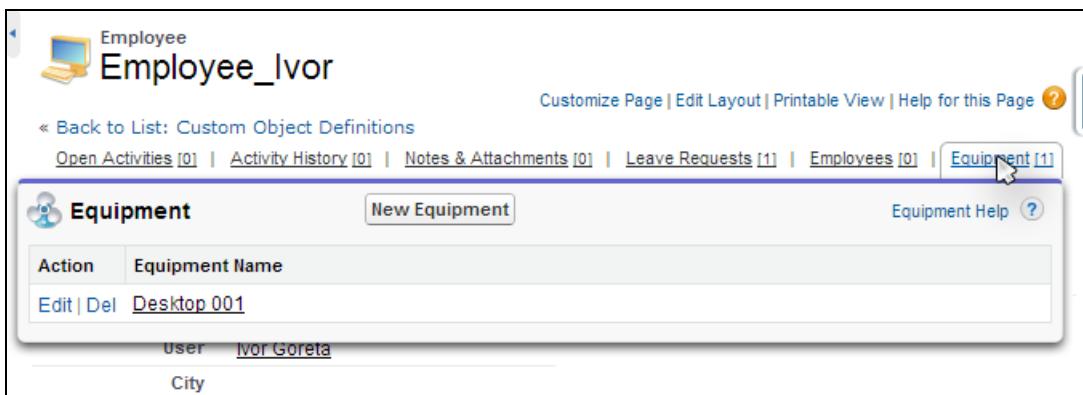
- Tab: Equipment
- New
- Equipment Name: Desktop 001
- Type: Desktop
- Brand: HP
- Employee: Employee_Ivor
- Save



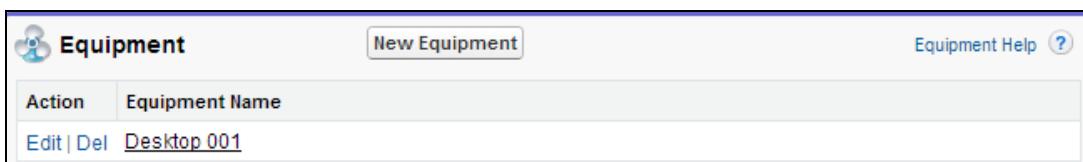
The screenshot shows the 'Equipment Edit' screen for a new equipment record. The title bar says 'Equipment Edit' and 'New Equipment'. The main area is titled 'Equipment Edit' with buttons for 'Save', 'Save & New', and 'Cancel'. A section titled 'Information' contains fields for 'Equipment Name' (Desktop 001), 'Type' (Desktop), 'Brand' (HP), and 'Employee' (Employee_Ivor). The 'Employee' field has a question mark icon and a magnifying glass icon.

Check Employee Record

- Tab: Employees
- Employee_Ivor
- (Hover over link to related list Equipment to show popup with all the Equipment referencing this Employee Record)
- (Click on a link to related list MyAccounts to get to the list of Accounts referencing this Case Record)



The screenshot shows the 'Employee' detail page for 'Employee_Ivor'. The top navigation bar includes links for 'Customize Page', 'Edit Layout', 'Printable View', and 'Help for this Page'. Below the navigation, there are links for 'Open Activities [0]', 'Activity History [0]', 'Notes & Attachments [0]', 'Leave Requests [1]', 'Employees [0]', and 'Equipment [1]'. The 'Equipment' link is highlighted with a mouse cursor. The main content area shows a table for the 'Equipment' related list, with a single row for 'Desktop 001'. The row includes 'Edit | Del' links and fields for 'User' (Ivor Goreta) and 'City'.



The screenshot shows the 'Equipment' related list table. It has columns for 'Action' and 'Equipment Name'. A single row is visible for 'Desktop 001'. The row includes 'Edit | Del' links.

2.2.2.6 Checkbox

Info

- This chapter shows how to create Checkbox Field.

Procedure

- Show Object Fields
- Choose Field Type: Checkbox
- Enter the details (As defined below in this chapter)
- Establish field-level security
- Add to Page Layout

Enter the details

- Field Label: MyCheckbox
- Default Value: Checked
- Field Name: MyCheckbox
- Description: MyCheckbox Field Description
- Help Text: MyCheckbox Field Help
- Next

Order [Help for this Page](#) ?

New Custom Field

Step 2. Enter the details Step 2 of 4

Previous [Next](#) Cancel

Field Label	<input type="text" value="MyCheckbox"/> i
Default Value	<input checked="" type="radio"/> Checked <input type="radio"/> Unchecked
Field Name	<input type="text" value="MyCheckbox"/> i
Description	<input type="text" value="MyCheckbox Field Description"/>
Help Text	<input type="text" value="MyCheckbox Field Help"/>

2.2.2.7 Currency

Info

- This chapter shows how to create Currency Field.

Procedure

- Show Object Fields
- Choose Field Type: Currency
- Enter the details (As defined below in this chapter)
- Establish field-level security
- Add to Page Layout

Enter the details

- Field Label: MyCurrency
- Length: 18 (Number of digits to the left of the decimal point)
- Decimal Places: 0 (Number of digits to the right of the decimal point)
- Field Name: MyCurrency
- Description: MyCurrency Field Description
- Help Text: MyCurrency Field Help
- Required: CHECK (Always require a value in this field in order to save a record)
- Default Value: 25.12 (Supports formula)
- Next

Order Help for this Page 

New Custom Field

Step 2. Enter the details Step 2 of 4

Previous Next Cancel

Field Label i

Please enter the length of the number and the number of decimal places. For example, a number with a length of 8 and 2 decimal places can accept values up to "12345678.90".

Length Decimal Places

Number of digits to the left of the decimal point Number of digits to the right of the decimal point

Field Name i

Description

Help Text

i

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

Default Value

Use formula syntax, e.g., Text in double quotes: "hello", Number: 25, Percent as decimal: 0.10, Date expression: Today() + 7

2.2.2.8 Date

Info

- This chapter shows how to create Date Field.

Procedure

- Show Object Fields
- Choose Field Type: Date
- Enter the details (As defined below in this chapter)
- Establish field-level security
- Add to Page Layout

Enter the details

- Field Label: MyDate
- Field Name: MyDate
- Description: MyDate Field Description
- Help Text: MyDate Field Help
- Required: CHECK (Always require a value in this field in order to save a record)
- Default Value: Today() + 7 (Supports formula)
- Next

Order Help for this Page 

New Custom Field

Step 2. Enter the details Step 2 of 4

Previous  Next  Cancel

Field Label	<input type="text" value="MyDate"/> 
Field Name	<input type="text" value="MyDate"/> 
Description	<input type="text" value="MyDate Field Description"/>
Help Text	<input type="text" value="MyDate Field Help"/> 
Required	<input checked="" type="checkbox"/> Always require a value in this field in order to save a record
Default Value	<input type="text" value="Show Formula Editor"/> <input type="text" value="Today() + 7"/> <small>Use formula syntax, e.g., Text in double quotes: "hello", Number: 25, Percent as decimal: 0.10, Date expression: Today() + 7</small>

2.2.2.9 Date/Time

Info

- This chapter shows how to create Date/Time Field.

Procedure

- Show Object Fields
- Choose Field Type: Date/Time
- Enter the details (As defined below in this chapter)
- Establish field-level security
- Add to Page Layout

Enter the details

- Field Label: MyDateTime
- Field Name: MyDateTime
- Description: MyDateTime Field Description
- Help Text: MyDateTime Field Help
- Required: CHECK (Always require a value in this field in order to save a record)
- Default Value: DATETIMEVALUE("2005-11-15 17:00:00") (Supports formula)
- Next

Account Help for this Page ?

New Custom Field

Step 2. Enter the details Step 2 of 4

Previous Next Cancel

Field Label	<input type="text" value="MyDateTime"/> i
Field Name	<input type="text" value="MyDateTime"/> i
Description	<input type="text" value="MyDateTime Field Description"/>
Help Text	<input type="text" value="MyDateTime Field Help"/> i
Required	<input checked="" type="checkbox"/> Always require a value in this field in order to save a record
Default Value	<input type="text" value="Show Formula Editor"/> <code>DATETIMEVALUE ("2005-11-15 17:00:00")</code> Use formula syntax: e.g., Text in double quotes: "hello", Number: 25, Percent as decimal: 0.10, Date expression: Today() + 7

2.2.2.10 Email

Info

- This chapter shows how to create Email Field.

Procedure

- Show Object Fields
- Choose Field Type: Email
- Enter the details (As defined below in this chapter)
- Establish field-level security
- Add to Page Layout

Enter the details

- Field Label: MyEmail
- Latitude and Longitude Display Notation: Degrees, Minutes, Seconds
- Decimal Places: 0 (Number of digits to the right of the decimal point)
- Field Name: MyEmail
- Description: MyEmail Field Description
- Help Text: MyEmail Field Help
- Required: CHECK (Always require a value in this field in order to save a record)
- Unique: CHECK (Do not allow duplicate values)
- External ID: CHECK (Set this field as the unique record identifier from an external system)
- Default Value: "ivoronline@gmail.com" (Supports formula)
- Next

Order [Help for this Page](#) 

New Custom Field

Step 2. Enter the details Step 2 of 4

Previous [Next](#) Cancel

Field Label	<input type="text" value="MyEmail"/> 
Field Name	<input type="text" value="MyEmail"/> 
Description	<input type="text" value="MyEmail Field Description"/>
Help Text	<input type="text" value="MyEmail Field Help"/> 
Required	<input checked="" type="checkbox"/> Always require a value in this field in order to save a record
Unique	<input checked="" type="checkbox"/> Do not allow duplicate values
External ID	<input checked="" type="checkbox"/> Set this field as the unique record identifier from an external system
Default Value	Show Formula Editor <input type="text" value="ivoronline@gmail.com"/> Use formula syntax , e.g., Text in double quotes: "hello", Number: 26, Percent as decimal: 0.10, Date expression: Today() + 7

2.2.2.11 Geolocation

Info

- This chapter shows how to create Geolocation Field.

Procedure

- Show Object Fields
- Choose Field Type: Geolocation
- Enter the details (As defined below in this chapter)
- Establish field-level security
- Add to Page Layout

Enter the details

- Field Label: MyGeolocation
- Latitude and Longitude Display Notation: Degrees, Minutes, Seconds
- Decimal Places: 0 (Number of digits to the right of the decimal point)
- Field Name: MyGeolocation
- Description: MyGeolocation Field Description
- Help Text: MyGeolocation Field Help
- Next

Order [Help for this Page](#)

New Custom Field

Step 2. Enter the details Step 2 of 4

Previous [Next](#) Cancel

Field Label [i](#)
Enter the name of the location, such as Main Office. Be descriptive and specific, and remember that one record may have multiple locations, such as West Coast Sales Office and East Coast Sales Office.

Latitude and Longitude Display Notation Degrees, Minutes, Seconds Decimal

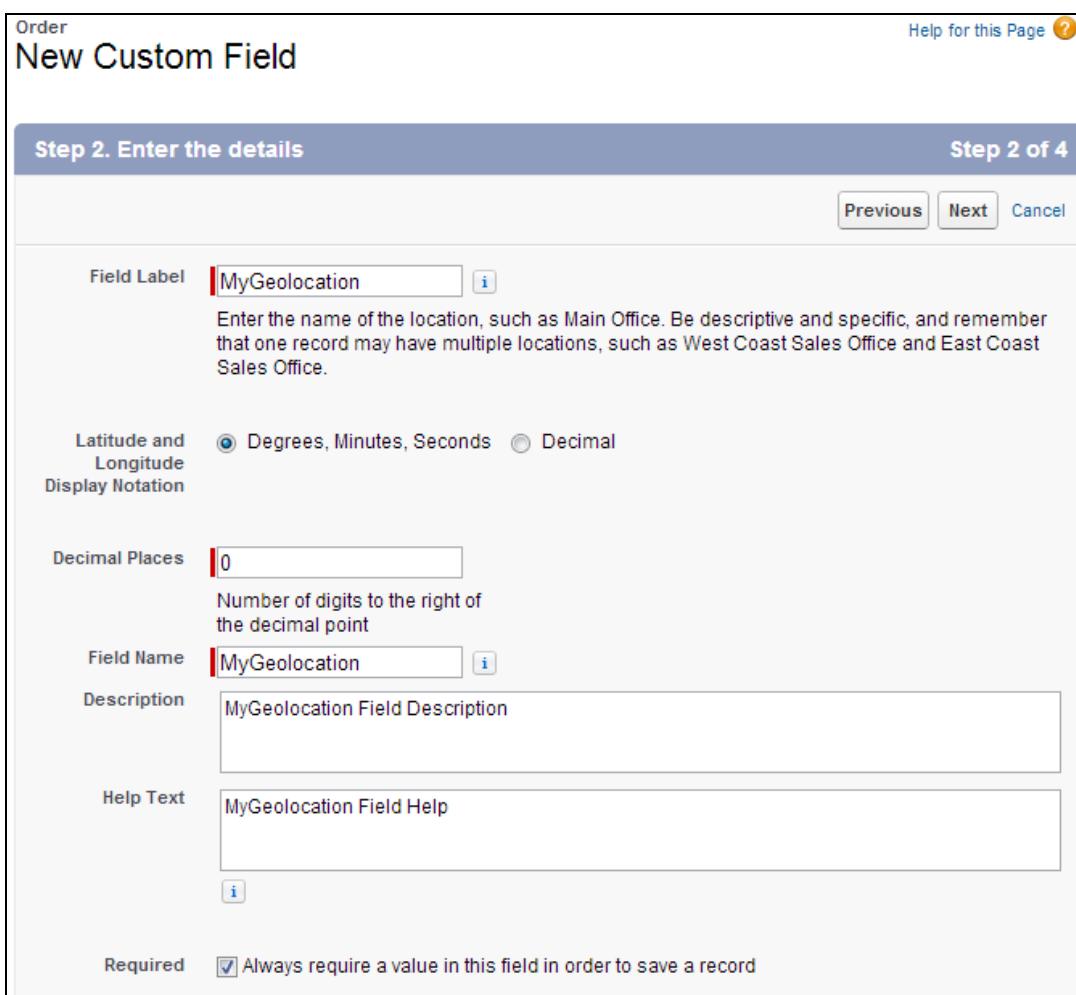
Decimal Places Number of digits to the right of the decimal point

Field Name [i](#)

Description

Help Text [i](#)

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



2.2.2.12 Number

Info

- This chapter shows how to create Number Field.

Procedure

- Show Object Fields
- Choose Field Type: Number
- Enter the details (As defined below in this chapter)
- Establish field-level security
- Add to Page Layout

Enter the details

- Field Label: MyNumber
- Length: 18 (Number of digits to the left of the decimal point)
- Decimal Places: 0 (Number of digits to the right of the decimal point)
- Field Name: MyNumber
- Description: MyNumber Field Description
- Help Text: MyNumber Field Help
- Required: CHECK (Always require a value in this field in order to save a record)
- Unique: CHECK (Do not allow duplicate values)
- External ID: CHECK (Set this field as the unique record identifier from an external system)
- Default Value: 25.12 (Supports formula)
- Next

Order Help for this Page

New Custom Field

Step 2. Enter the details Step 2 of 4

Previous Next Cancel

Field Label	MyNumber		
Please enter the length of the number and the number of decimal places. For example, a number with a length of 8 and 2 decimal places can accept values up to "12345678.90".			
Length	18	Decimal Places	0
Number of digits to the left of the decimal point		Number of digits to the right of the decimal point	
Field Name	MyNumber		
Description	MyNumber Field Description		
Help Text	MyNumber Field Help		
Required	<input checked="" type="checkbox"/> Always require a value in this field in order to save a record		
Unique	<input checked="" type="checkbox"/> Do not allow duplicate values		
External ID	<input checked="" type="checkbox"/> Set this field as the unique record identifier from an external system		
Default Value	Show Formula Editor 25.12		
Use formula syntax ; e.g., Text in double quotes: "Hello", Number: 25, Percent as decimal: 0.10, Date expression: Today() + 7			

2.2.2.13 Percent

Info

- This chapter shows how to create Percent Field.

Procedure

- Show Object Fields
- Choose Field Type: Percent
- Enter the details (As defined below in this chapter)
- Establish field-level security
- Add to Page Layout

Enter the details

- Field Label: MyPercent
- Length: 18 (Number of digits to the left of the decimal point)
- Decimal Places: 0 (Number of digits to the right of the decimal point)
- Field Name: MyPercent
- Description: MyPercent Field Description
- Help Text: MyPercent Field Help
- Required: CHECK (Always require a value in this field in order to save a record)
- Default Value: 25.12 (Supports formula)
- Next

Order [Help for this Page](#)

New Custom Field

Step 2. Enter the details Step 2 of 4

Previous [Next](#) Cancel

Field Label [i](#)

Please enter the length of the number and the number of decimal places. For example, a number with a length of 8 and 2 decimal places can accept values up to "12345678.90".

Length Decimal Places

Number of digits to the left of the decimal point Number of digits to the right of the decimal point

Field Name [i](#)

Description

Help Text [i](#)

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

Default Value [Show Formula Editor](#)

Use [formula syntax](#); e.g., Text in double quotes: "hello", Number: 25, Percent as decimal: 0.10, Date expression: Today() + 7

2.2.2.14 Phone

Info

- This chapter shows how to create Phone Field.

Procedure

- Show Object Fields
- Choose Field Type: Phone
- Enter the details (As defined below in this chapter)
- Establish field-level security
- Add to Page Layout

Enter the details

- Field Label: MyPhone
- Field Name: MyPhone
- Description: MyPhone Field Description
- Help Text: MyPhone Field Help
- Required: CHECK (Always require a value in this field in order to save a record)
- Default Value: "MyPhone default value" (Supports formula)
- Next

Order Help for this Page 

New Custom Field

Step 2. Enter the details Step 2 of 4

Previous  Next  Cancel

Field Label	<input type="text" value="MyPhone"/> 
Field Name	<input type="text" value="MyPhone"/> 
Description	<input type="text" value="MyPhone Field Description"/>
Help Text	<input type="text" value="MyPhone Field Help"/> 
Required	<input checked="" type="checkbox"/> Always require a value in this field in order to save a record
Default Value	<input type="text" value="Show Formula Editor"/> <input default="" myphone="" type="text" value="\" value\""=""/> <small>Use formula syntax: e.g., Text in double quotes: "hello", Number: 25, Percent as decimal: 0.10, Date expression: Today() + 7</small>

2.2.2.15 Picklist

Info

- This chapter shows how to create Picklist Field.
- Picklist values are entered delimited by a new line.

Procedure

- Show Object Fields
- Choose Field Type: Picklist
- Enter the details (As defined below in this chapter)
- Establish field-level security
- Add to Page Layout

Enter the details

- Field Label: Sector
- Please enter the list of values for the picklist field below. Each value should be separated by a new line.
- Education
- Health
- Construction
- Sort values alphabetically, not in the order entered: CHECK
- Use first value as default value: CHECK
- Field Name: Sector
- Description: Choose company sector
- Help Text: Choose company sector
- Next

Account Help for this Page ?

New Custom Field

Step 2. Enter the details Step 2 of 4

Field Label i

Please enter the list of values for the picklist field below. Each value should be separated by a new line.

Education
Health
Construction

Sort values alphabetically, not in the order entered. Values will be displayed alphabetically everywhere.

Use first value as default value

Field Name i

Description

Help Text i

Previous Next Cancel

2.2.2.15.1 Define default picklist value

Info

- During picklist creation you can only select if you want first value to be default.
- Only after picklist is created you can define if you want some other value to be default.

Choose default value

- (Select picklist field)
- Section: Picklist Values
- (Click on Edit next to value you want to make default)
- Default: CHECK (Make this value the default for the master picklist)
- Save

Picklist Values				
Action	Values	Default	Chart Colors	Modified By
Edit Del	Construction	<input checked="" type="checkbox"/>	Assigned dynamically	Ivor Goreta, 28/06/2013 10:49
Edit Del	Education	<input type="checkbox"/>	Assigned dynamically	Ivor Goreta, 24/06/2013 18:57
Edit Del	Health	<input type="checkbox"/>	Assigned dynamically	Ivor Goreta, 24/06/2013 18:57

Picklist Edit
Sector

Enter a name for the picklist value below. Check the box to use this value as the default for the master picklist.

Sector: Construction Make this value the default for the master picklist
Chart Color: Assigned dynamically 

Save Cancel

2.2.2.15.2 Create Dependent picklist

Info

[R]

- This chapter shows how to create dependency between two picklist.
- Dependent picklists are called Controlling and Depended picklist.
- Values that can be chosen in Depended picklist will depend on the value chosen in Controlling picklist.
- In this example Controlling picklist is Sector and Depended picklist is Products.

Sector: Construction	Products: --None--
	--None--
	Sky scraper
	Cottage
	Bridge
Sector: Education	Products: --None--
	--None--
	Book on Mathematics
	Book on Physics
	Book on Chemistry
Sector: Health	Products: --None--
	--None--
	Cure for AIDS
	Cure for common flue

Restrictions

- Depended picklist can't have default value. (You can define it but it will be ignored)

Create Controlling Picklist

Select picklist type

- [Show Object Fields](#)
- [Choose Field Type](#): Picklist

Define Picklist Values

- Field Label: Sector
- Please enter the list of values for the picklist field below. Each value should be separated by a new line.

Education

Health

Construction

- Sort values alphabetically, not in the order entered:

- Use first value as default value:

- Field Name: Sector

- Description:Choose company sector

- Help Text: Choose company sector

- Next

Define FLS & Page Layout

- [Establish field-level security](#)
- [Add to Page Layout](#)

Create Depended Picklist

Select picklist type

- [Show Object Fields](#)
- [Choose Field Type](#): Picklist

Define Picklist Values

- Field Label: Products

- Please enter the list of values for the picklist field below. Each value should be separated by a new line.

Book on Mathematics

Book on Physics

Book on Chemistry

Cure for AIDS

Cure for common flue

Sky scraper

Cottage

Bridge

- Sort values alphabetically, not in the order entered:

- Use first value as default value:

- Field Name: Sector

- Description:Choose company sector

- Help Text: Choose company sector

- Next

Define FLS & Page Layout

- [Establish field-level security](#)
- [Add to Page Layout](#)

Define Dependencies

- Section: Account Custom Fields & Relationships
- Field Dependencies
- New
- Continue
- Controlling Field: Sector
- Dependent Field: Products
- Continue
- (Select specific cells to define relationships between picklist values)
- Save

Account Custom Fields & Relationships						New	Field Dependencies	Account Cus
Action	Field Label	API Name	Installed Package	Data Type	Controlling Field			
Edit Del Replace	Active	Active__c		Picklist				
Edit Del Replace	Customer Priority	CustomerPriority__c		Picklist				
Edit Del	Number of Locations	NumberofLocations__c		Number(3, 0)				
Edit Del Replace	Products	Products__c		Picklist	Sector			
Edit Del Replace	Sector	Sector__c		Picklist				
Edit Del Replace	SLA	SLA__c		Picklist				

Account Field Dependencies

Help for this Page 

This page allows you to define dependencies between fields (e.g., dependent picklists).

Field Dependencies				New
Action	Controlling Field	Dependent Field	Modified By	
Edit Del	Sector	Products	Ivor Goreta, 28/06/2013 10:18	

Edit Field Dependency

Help for this Page 

		Save	Cancel	Preview																												
Controlling Field	Sector																															
Dependent Field	Products																															
Instructions <ul style="list-style-type: none"> Double click on a cell to toggle its visibility for the Controlling Field value shown in the column heading. To change multiple cells at once, select multiple cells and then click the Include Values or Exclude Values button to change the visibility of all selected cells at once. Use SHIFT + click to select a range of adjacent cells. Use CTRL + click to select multiple cells that are not adjacent. Use the Preview button to test the results. 																																
<p>Click button to include or exclude selected values from the dependent picklist</p> <p><input type="button" value="Include Values"/> <input type="button" value="Exclude Values"/></p> <table border="1"> <thead> <tr> <th colspan="3">Showing Columns: 1 - 3 (of 3) < Previous Next > View All Go to</th> </tr> <tr> <th>Sector:</th> <th>Construction</th> <th>Education</th> </tr> </thead> <tbody> <tr> <td rowspan="7">Products:</td> <td>Book on Mathematics</td> <td>Book on Mathematics</td> <td>Book on Mathematics</td> </tr> <tr> <td>Book on Physics</td> <td>Book on Physics</td> <td>Book on Physics</td> </tr> <tr> <td>Book on Chemistry</td> <td>Book on Chemistry</td> <td>Book on Chemistry</td> </tr> <tr> <td>Cure for AIDS</td> <td>Cure for AIDS</td> <td>Cure for AIDS</td> </tr> <tr> <td>Cure for common flue</td> <td>Cure for common flue</td> <td>Cure for common flue</td> </tr> <tr> <td>Sky scraper</td> <td>Sky scraper</td> <td>Sky scraper</td> </tr> <tr> <td>Cottage</td> <td>Cottage</td> <td>Cottage</td> </tr> </tbody> </table> <p>Showing Columns: 1 - 3 (of 3) < Previous Next > View All</p> <p>Click button to include or exclude selected values from the dependent picklist</p> <p><input type="button" value="Include Values"/> <input type="button" value="Exclude Values"/></p>					Showing Columns: 1 - 3 (of 3) < Previous Next > View All Go to			Sector:	Construction	Education	Products:	Book on Mathematics	Book on Mathematics	Book on Mathematics	Book on Physics	Book on Physics	Book on Physics	Book on Chemistry	Book on Chemistry	Book on Chemistry	Cure for AIDS	Cure for AIDS	Cure for AIDS	Cure for common flue	Cure for common flue	Cure for common flue	Sky scraper	Sky scraper	Sky scraper	Cottage	Cottage	Cottage
Showing Columns: 1 - 3 (of 3) < Previous Next > View All Go to																																
Sector:	Construction	Education																														
Products:	Book on Mathematics	Book on Mathematics	Book on Mathematics																													
	Book on Physics	Book on Physics	Book on Physics																													
	Book on Chemistry	Book on Chemistry	Book on Chemistry																													
	Cure for AIDS	Cure for AIDS	Cure for AIDS																													
	Cure for common flue	Cure for common flue	Cure for common flue																													
	Sky scraper	Sky scraper	Sky scraper																													
	Cottage	Cottage	Cottage																													

2.2.2.16 Picklist (Multi-Select)

Info

- This chapter shows how to create Picklist (Multi-Select) Field.

Procedure

- Show Object Fields
- Choose Field Type: Picklist (Multi-Select)
- Enter the details (As defined below in this chapter)
- Establish field-level security
- Add to Page Layout

Enter the details

- Field Label: MyPicklistMultiSelect
- Please enter the list of values for the picklist field below. Each value should be separated by a new line.
Education
Health
Construction
- Sort values alphabetically, not in the order entered:
- Use first value as default value:
- *# Visible Lines: 4
- Field Name: MyPicklistMultiSelect
- Description: MyPicklistMultiSelect Field Description
- Help Text: MyPicklistMultiSelect Field Help
- Next

Order [Help for this Page](#)

New Custom Field

Step 2. Enter the details Step 2 of 4

Previous [Next](#) Cancel

Field Label [i](#)

Please enter the list of values for the picklist field below. Each value should be separated by a new line.

[i](#)

Sort values alphabetically, not in the order entered. Values will be displayed alphabetically everywhere.

Use first value as default value

Multi-select picklists are displayed in a scrolling box on edit pages.

Visible Lines [i](#)

Field Name [i](#)

Description [i](#)

Help Text [i](#)

2.2.2.17 Text

Info

- This chapter shows how to create Text Field.

Procedure

- Show Object Fields
- Choose Field Type: Text
- Enter the details (As defined below in this chapter)
- Establish field-level security
- Add to Page Layout

Enter the details

- Field Label: MyText
- Length: 255 (255 is max number of characters)
- Field Name: MyText
- Description: MyText Field Description
- Help Text: MyText Field Help
- Required: CHECK (Always require a value in this field in order to save a record)
- Unique: CHECK (Do not allow duplicate values)
- External ID: CHECK (Set this field as the unique record identifier from an external system)
- Default Value: "MyText default value" (Supports formula)
- Next

Order [Help for this Page](#)

New Custom Field

Step 2. Enter the details Step 2 of 4

Previous [Next](#) Cancel

Field Label	<input type="text" value="MyText"/> i
Please enter the maximum length for a text field below.	
Length	<input type="text" value="255"/>
Field Name	<input type="text" value="MyText"/> i
Description	<input type="text" value="MyText Field Description"/>
Help Text	<input type="text" value="MyText Field Help"/> i
Required	<input checked="" type="checkbox"/> Always require a value in this field in order to save a record
Unique	<input checked="" type="checkbox"/> Do not allow duplicate values <ul style="list-style-type: none"><input checked="" type="radio"/> Treat "ABC" and "abc" as duplicate values (case insensitive)<input type="radio"/> Treat "ABC" and "abc" as different values (case sensitive)
External ID	<input checked="" type="checkbox"/> Set this field as the unique record identifier from an external system
Default Value	Show Formula Editor "MyText default value" Use formula syntax ; e.g., Text in double quotes: "hello", Number: 25, Percent as decimal: 0.10, Date expression: Today() + 7

2.2.2.18 Text Area

Info

- This chapter shows how to create Text Area Field.

Procedure

- Show Object Fields
- Choose Field Type: Text Area
- Enter the details (As defined below in this chapter)
- Establish field-level security
- Add to Page Layout

Enter the details

- Field Label: MyTextArea
- Field Name: MyTextArea
- Description: MyTextAreaField Description
- Help Text: MyTextAreaField Help
- Required: CHECK (Always require a value in this field in order to save a record)
- Default Value: "MyTextArea default value" (Supports formula)
- Next

Order [Help for this Page](#)

New Custom Field

Step 2. Enter the details Step 2 of 4

Previous [Next](#) Cancel

Field Label	MyTextArea i
Field Name	MyTextArea i
Description	MyTextArea Field Description
Help Text	MyTextArea Field Help i
Required	<input checked="" type="checkbox"/> Always require a value in this field in order to save a record
Default Value	Show Formula Editor "MyTextArea default value" Use formula syntax , e.g., Text in double quotes: "hello", Number: 25, Percent as decimal: 0.10, Date expression: Today() + 7

2.2.2.19 Text Area (Long)

Info

- This chapter shows how to create Text Area (Long) Field.

Procedure

- Show Object Fields
- Choose Field Type: Text Area
- Enter the details (As defined below in this chapter)
- Establish field-level security
- Add to Page Layout

Enter the details

- Field Label: MyTextAreaLong
- Length: 32768
- # Visible Lines: 3
- Field Name: MyTextAreaLong
- Description: MyTextAreaLong Description
- Help Text: MyTextAreaLong Help
- Default Value: "MyTextAreaLong default value" (Supports formula)
- Next

Order Help for this Page 

New Custom Field

Step 2. Enter the details Step 2 of 4

Previous  Next  Cancel 

Field Label	<input type="text" value="MyTextAreaLong"/> 
You are currently using 0 out of 1,638,400 characters on this object. You have 1,638,400 additional characters to allocate to this field.	
Length	<input type="text" value="32768"/>  (Max 32,768)
# Visible Lines	<input type="text" value="3"/> 
Field Name	<input type="text" value="MyTextAreaLong"/> 
Description	<input type="text" value="MyTextAreaLong Field Description"/>
Help Text	<input type="text" value="MyTextAreaLong Field Help"/> 
Default Value	Show Formula Editor <input type="text" value="MyTextAreaLong default value"/>  Use formula syntax e.g., Text in double quotes: "hello", Number: 25, Percent as decimal: 0.10, Date expression: Today() + 7

2.2.2.20 Text Area (Rich)

Info

- This chapter shows how to create Text Area (Rich) Field.

Procedure

- Show Object Fields
- Choose Field Type: Text Area
- Enter the details (As defined below in this chapter)
- Establish field-level security
- Add to Page Layout

Enter the details

- Field Label: MyTextAreaRich
- Length: 32768
- # Visible Lines: 25
- Field Name: MyTextAreaRich
- Description: MyTextAreaRich Description
- Help Text: MyTextAreaRich Help
- Next

Order [Help for this Page](#) ?

New Custom Field

Step 2. Enter the details Step 2 of 4

Previous [Next](#) Cancel

Field Label [i](#)

You are currently using 0 out of 1,638,400 characters on this object. You have 1,638,400 additional characters to allocate to this field.

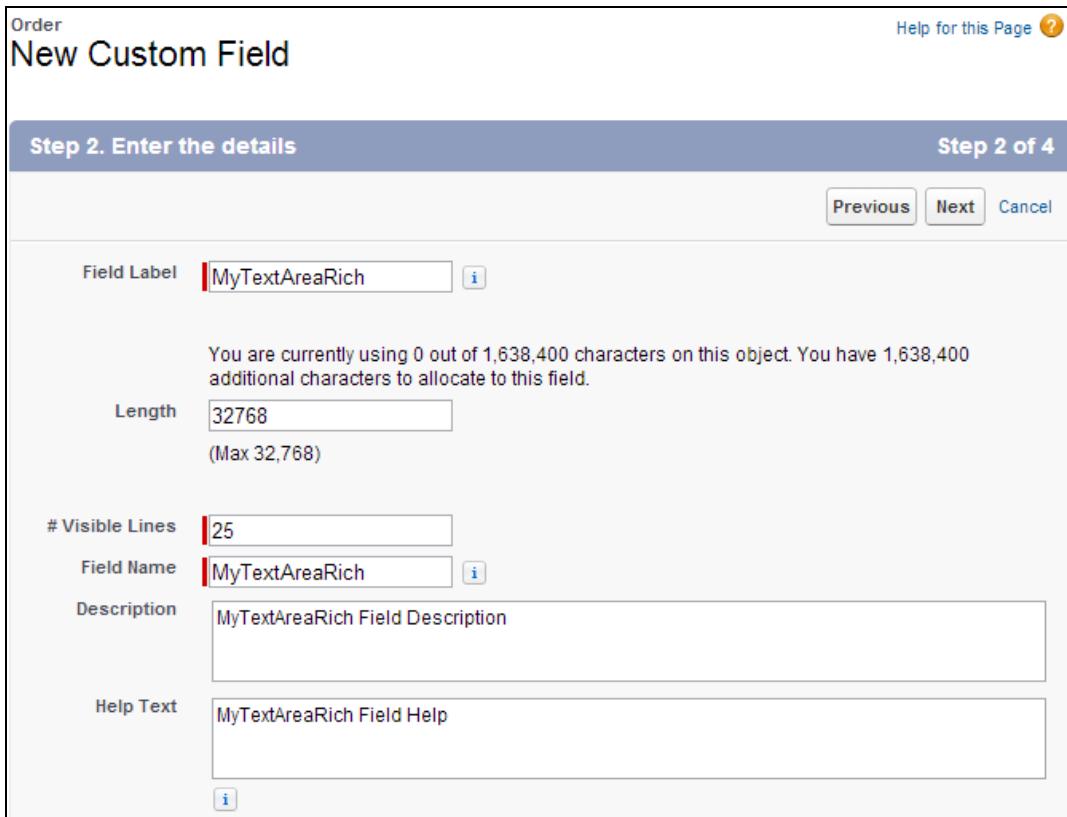
Length (Max 32,768)

Visible Lines

Field Name [i](#)

Description

Help Text [i](#)



2.2.2.21 Text (Encrypted)

Info

- Encrypted custom fields are text fields that can contain letters, numbers, or symbols but are encrypted.
- The value of an encrypted field is only visible to users that have the “View Encrypted Data” permission.
- Only the `<apex:outputField>` component supports presenting encrypted fields in Visualforce pages
- Additional info can be found at [About Encrypted Custom Fields](#).

Restrictions

- Limited to 175 characters
- Are not available for use in filters such as list views, reports, roll-up summary fields, and rule filters
- Cannot be used to define report criteria
- Are not searchable
- Are not available in the following: lead conversion, workflow rule criteria or formulas, formula fields, outbound messages, default values, and Web-to-Lead and Web-to-Case forms
- Encrypted custom fields cannot be unique, an external ID, or have default values.

Allowed

- You can validate the values of encrypted fields using validation rules or Apex.
- Can be included in repo
- Can be included in search results
- Encrypted fields are editable regardless of whether the user has the “View Encrypted Data” permission.

Use validation rules, field-level security settings, or page layout settings to prevent users from editing encrypted fields.

Create Encrypted Field

- Show Object Fields
- Choose Field Type: Text (Encrypted)
- Enter the details (As defined below in this chapter)
- Establish field-level security
- Add to Page Layout

Enter the details

- Field Label: MyTextEncrypted
- Length: 175 (175 is max value)
- Field Name: MyTextEncrypted
- Description: MyTextEncrypted Description
- Help Text: MyTextEncrypted Help
- Required: CHECK (Always require a value in this field in order to save a record)
- Mask Type: Mask All Characters
- Mask Character: * (* or 'X')
- Example: *****
- Next

Order [Help for this Page](#) 

New Custom Field

Step 2. Enter the details Step 2 of 4

Previous [Next](#) Cancel

Field Label	<input type="text" value="MyTextEncrypted"/> 
Please enter the maximum length for a text field below.	
Length	<input type="text" value="175"/>
Field Name	<input type="text" value="MyText"/> 
Description	<input type="text" value="MyTextEncrypted Field Description"/>
Help Text	<input type="text" value="MyTextEncrypted Field Help"/> 
Required	<input checked="" type="checkbox"/> Always require a value in this field in order to save a record
Mask Type	<input type="text" value="Mask All Characters"/> 
Mask Character	<input type="text" value="*"/> 
Example	*****

2.2.2.22 URL

Info

- This chapter shows how to create URL Field.

Procedure

- Show Object Fields
- Choose Field Type: URL
- Enter the details (As defined below in this chapter)
- Establish field-level security
- Add to Page Layout

Enter the details

- Field Label: MyURL
- Length: 175 (175 is max value)
- Field Name: MyURL
- Description: MyURL Description
- Help Text: MyURL Help
- Required: CHECK (Always require a value in this field in order to save a record)
- Default Value: "MyURL default value" (Supports formula)
- Next

Order Help for this Page 

New Custom Field

Step 2. Enter the details Step 2 of 4

Previous  Next  Cancel

Field Label	<input type="text" value="MyURL"/> 
Field Name	<input type="text" value="MyURL"/> 
Description	<input type="text" value="MyURL Field Description"/>
Help Text	<input type="text" value="MyURL Field Help"/> 
Required	<input checked="" type="checkbox"/> Always require a value in this field in order to save a record
Default Value	<input type="text" value="Show Formula Editor"/>  "MyURL default value" Use formula syntax, e.g., Text in double quotes: "hello", Number: 25, Percent as decimal: 0.10, Date expression: Today() + 7

2.2.3 Standard Fields

Info

- Following chapters describe different standard fields, their function and usage.

2.2.3.1 Record Owner

Info

- Record owner can be
 - User
 - Queue for Leads and Cases
- Record owner can View, Edit, Delete and Transfer ownership unless restricted through
 - Profiles Object Permissions which can remove View, Edit and Delete permissions
 - Profiles Field Level Security which can remove View, Edit and Delete permissions for specific fields
 - Profiles General User Permissions which contains options to activate “Transfer Leads” and “Transfer Cases.”
 - Page Layout which might not display all fields
- Record owner can be changed by
 - record owner
 - user above record owner in role hierarchy
 - user with modify all permission

2.3 Record Types

Info

- Record Type is a special type of picklist field.
- It behaves like a normal picklist field since it allows you from predefined set of values.
- It is special since defining and choosing those values is done in a different way together with other peculiarities.

Usage

- Combination of Record Type and Profile defines which Page Layout will be used to display Record Fields.
- It behaves as controlling picklist for ALL other picklists defining which values will be available for each of them.

Record Type vs Picklist Field

Similarities

- Both allow you to predefine set of values you can later select from.
- Both allow you to select single value from that predefined set of values.
- Both can be controlling picklist where selected value defines what values of other picklist will be available.

Differences

- Set of values you can later select from are defined in a different way.
- Selecting single value from that predefined set of values is done in a different way.
- Picklist CAN be controlling picklist while Record type is ALWAYS controlling picklist.
- If picklist is controlling picklist it can control only available values of ONE other picklist.
Record type is ALWAYS controlling picklist of ALL other picklists.
- Combination of Record Type and Profile defines which Page Layout will be used to display Record Fields.

2.3.1 View Record Types of specific Object

Info

- This tutorial shows how to view Record Types of Specific Object.
- Procedure differs between standard and custom Objects as shown below.

For Standard Objects

- Setup
- Build
- Customize
- (Select Standard Object) (For example: Account)
- **Record Types** (This is a link)

Account Record Type Help for this Page 

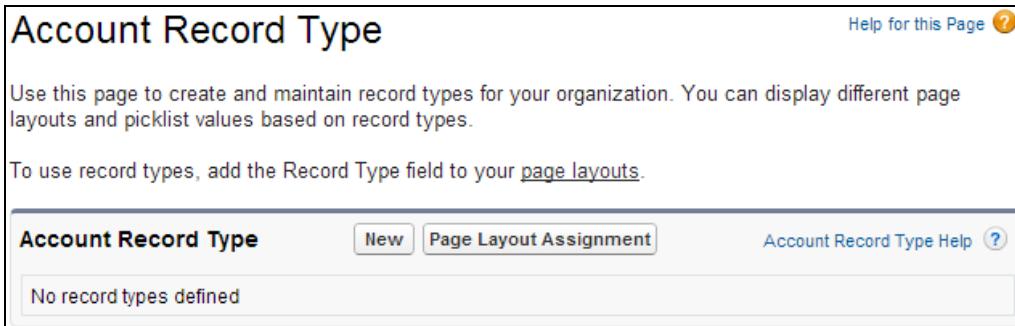
Use this page to create and maintain record types for your organization. You can display different page layouts and picklist values based on record types.

To use record types, add the Record Type field to your [page layouts](#).

Account Record Type Account Record Type Help 

[New](#) [Page Layout Assignment](#)

No record types defined



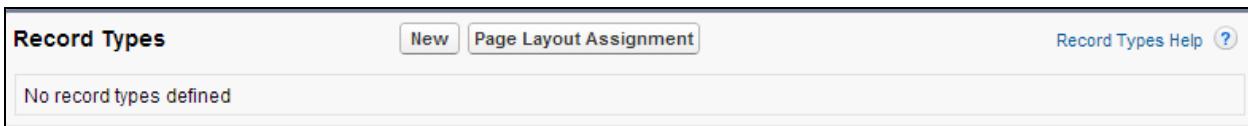
For Custom Objects

- Setup
- Build
- Create
- Objects
- (Select Custom Object) (For example: Employee)
- **Section: Record Types**

Record Types Record Types Help 

[New](#) [Page Layout Assignment](#)

No record types defined



2.3.2 Create new Record Type for specific Object

Info

- This tutorial shows how to create new Record Type for specific Object.

Create Record Type

[View Record Types of Specific Object](#)

New

Existing Record Type: --Master--

(It will include picklist values from selected Record Type)

Record Type Label: RecordType1

(Defines record Type Name)

Record Type Name: RecordType1

(Automatically populated by Record Type Label)

Description: Description of RecordType1

Active: CHECK

Next

New Record Type Help for this Page 

Step 1. Enter the details Step 1 of 2

Enter a name and description for the new record type. The new record type will include all the picklist values from the existing record type selected below. After saving the new record type, you will be able to customize the picklist values.

Record Type	
Existing Record Type	<input type="button" value="--Master--"/>
Record Type Label	RecordType1
Record Type Name	RecordType1 
Description	Description of RecordType1
Active	<input checked="" type="checkbox"/>

Select the Enable for Profile checkbox to make the new record type available to a profile. Users assigned to this profile will be able to create records of this record type, or assign this record type to existing records. To make the new record type the default for a profile, select the Make Default checkbox.

Profile Name	Record Types Currently Available	<input checked="" type="checkbox"/> Enable for Profile	<input type="checkbox"/> Make Default
Contract Manager		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom: Marketing Profile		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom: Sales Profile		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom: Support Profile		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Customer Portal Manager Custom		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Customer Portal Manager Standard		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Gold Partner User		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
High Volume Customer Portal		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Marketing User		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Read Only		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Silver Partner User		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Solution Manager		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Standard Platform User		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Standard User		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
System Administrator		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
System Administrator Test		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

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

Assign page layouts

- Apply one layout to all profiles: Account (Support) Layout
- Save

New Record Type [Help for this Page](#) [?](#)
Account

Step 2. Assign page layouts **Step 2 of 2**

Account Record Type: RecordType1
Record Type Name: RecordType1
Description: Description of RecordType1

Select the page layout that users with this profile see for records with this record type. After saving, choose the picklist values that are available with this record type.

Apply one layout to all profiles Apply a different layout for each profile

Profile: **Page Layout**

Contract Manager	Account (Support) Layout
Custom: Marketing Profile	Account (Support) Layout
Custom: Sales Profile	Account (Support) Layout
Custom: Support Profile	Account (Support) Layout
Customer Portal Manager Custom	Account (Support) Layout
Customer Portal Manager Standard	Account (Support) Layout
Gold Partner User	Account (Support) Layout
High Volume Customer Portal	Account (Support) Layout
Marketing User	Account (Support) Layout
Read Only	Account (Support) Layout
Silver Partner User	Account (Support) Layout
Solution Manager	Account (Support) Layout
Standard Platform User	Account (Support) Layout
Standard User	Account (Support) Layout
System Administrator	Account (Support) Layout
System Administrator Test	Account (Support) Layout

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

Test

- View Record Types of Specific Object

Account Record Type [Help for this Page](#) [?](#)

Use this page to create and maintain record types for your organization. You can display different page layouts and picklist values based on record types.

To use record types, add the Record Type field to your [page layouts](#).

Account Record Type		New	Page Layout Assignment	Account Record Type Help ?
Action	Record Type Label	Description	Active	Modified By
Edit Del	RecordType1	Description of RecordType1	<input checked="" type="checkbox"/>	Ivor Goreta, 09/07/2013 22:19

2.3.3 Edit picklist values available for Record Type

Info

- This tutorial shows how to define which picklist values will be available for each picklist for specific Record Type.

Open Record Type

- [View Record Types of Specific Object](#) (For example: For Account Object)
- [\(Select Record Type\)](#) (For example: RecordType1)

List of Record Types

Account Record Type [Help for this Page](#) 

Use this page to create and maintain record types for your organization. You can display different page layouts and picklist values based on record types.

To use record types, add the Record Type field to your [page layouts](#).

Account Record Type		New	Page Layout Assignment	Account Record Type Help 
Action	Record Type Label	Description	Active	Modified By
Edit Del	RecordType1	Description of RecordType1	<input checked="" type="checkbox"/>	Ivor Goreta, 09/07/2013 22:19

List of picklist Fields

Record Type [RecordType1](#) [Help for this Page](#) 

Use the Edit button to change the properties of this record type. Use the Edit links in the Picklist Values related list to choose the picklist values available for records with this record type.

		Edit
Record Type Label	RecordType1	Active <input checked="" type="checkbox"/>
Record Type Name	RecordType1	
Namespace Prefix		
Description	Description of RecordType1	
Created By	Ivor Goreta, 09/07/2013 22:19	Modified By Ivor Goreta , 09/07/2013 22:19

Picklists Available for Editing [Picklists Available for Editing Help](#) 

Action	Field	Modified Date
Edit	Account Source	09/07/2013 22:19
Edit	Active	09/07/2013 22:19
Edit	Customer Priority	09/07/2013 22:19
Edit	Industry	09/07/2013 22:19
Edit	Ownership	09/07/2013 22:19
Edit	Products	09/07/2013 22:19
Edit	Rating	09/07/2013 22:19
Edit	Sector	09/07/2013 22:19
Edit	SLA	09/07/2013 22:19
Edit	Type	09/07/2013 22:19
Edit	Upsell Opportunity	09/07/2013 22:19

Edit picklist values for specific picklist

- (Click on Edit beside picklist) (For example: Products picklist)
- (Select values to Add or Remove) (Use Ctrl or Shift to select multiple values)
- (Press Add or Remove buttons)
- Save

Picklist values of Product picklist allowed for this Record Type

Record Type Edit Help for this Page 

Products

General Properties

Field Label	Products
Record Type	RecordType1

Picklist Values

Select an item from the Available Values list and add it to the Selected Values list to include it as a picklist value for this Record Type. Note that removing an item from the picklist does not remove it from any existing records. Finally, select a default picklist value for this Record Type.

Available Values	Selected Values
Book on Physics Cure for AIDS	Book on Mathematics Book on Chemistry Cure for common flue Sky scraper Cottage Bridge

Default

Test

- (Create another Record Type as shown above) (For example: RecordType2)
- Tab: Accounts
- New
- Record Type of new record: RecordType1 (Picklist is shown only if none or multiple Record Types are defined)
- Continue
- Account Name: Test Record Type 1
- Sector: Health
- Products: Cure for common flue
- Save

New Account Help for this Page

Select Account Record Type

Select a record type for the new account. To skip this page in the future, change your record type settings on your personal setup page.

Select Account Record Type

Record Type of new record: RecordType1

Continue Cancel

Available Account Record Types

Record Type Name	Description
RecordType1	Description of RecordType1
RecordType2	

"Cure for AIDS" is not shown since it is not supported by RecordType1

Account Edit Help for this Page

Test Record Type 1

Account Edit Save Save & New Cancel

Account Information = Required Information

Account Owner	Ivor Goreta	Active	-None--
Account Name	Test Record Type 1	Customer Priority	-None--
Parent Account		SLA	-None--
Account Number		SLA Expiration Date	[09/07/2013]
Account Site		SLA Serial Number	
Phone		Rating	-None--
Fax		Upsell Opportunity	-None--
Website		Number of Locations	
Sector	Health	Type	-None--
Products	-None--		
MyCase	-None--		
	Cure for common flue		

2.3.4 Assign Page Layout for each Profile and Record Type combination

Info

- This tutorial shows how to assign Page Layout for each Profile and Record Type combination.

Open Assignments

- [View Record Types of Specific Object](#) (For example: For Account Object)
- [Page Layout Assignment](#)
- [Edit Assignment](#)

Account Record Type [Help for this Page](#)

Use this page to create and maintain record types for your organization. You can display different page layouts and picklist values based on record types.

To use record types, add the Record Type field to your [page layouts](#).

Account Record Type		New	Page Layout Assignment	Account Record Type Help	
Action	Record Type Label	Description	Active	Modified By	
Edit Del	RecordType1	Description of RecordType1	<input checked="" type="checkbox"/>	Ivor Goreta, 09/07/2013 22:35	
Edit Del	RecordType2		<input checked="" type="checkbox"/>	Ivor Goreta, 09/07/2013 22:38	

Page Layout Assignment [Help for this Page](#)

Account

The table below shows the page layout assignments for different record type and profile combinations.

Edit Assignment				
Profiles	Record Types			(1-3 of 3)
	Master	RecordType1	RecordType2	
Contract Manager	Account Layout	Account (Support) Layout	Account (Marketing) Layout	
Custom: Marketing Profile	Account (Marketing) Layout	Account (Support) Layout	Account (Marketing) Layout	
Custom: Sales Profile	Account (Sales) Layout	Account (Support) Layout	Account (Marketing) Layout	
Custom: Support Profile	Account (Support) Layout	Account (Support) Layout	Account (Marketing) Layout	
Customer Portal Manager Custom	Account Layout	Account (Support) Layout	Account (Marketing) Layout	
Customer Portal Manager Standard	Account Layout	Account (Support) Layout	Account (Marketing) Layout	
Gold Partner User	Account Layout	Account (Support) Layout	Account (Marketing) Layout	
High Volume Customer Portal	Account Layout	Account (Support) Layout	Account (Marketing) Layout	
Marketing User	Account Layout	Account (Support) Layout	Account (Marketing) Layout	
Read Only	Account Layout	Account (Support) Layout	Account (Marketing) Layout	
Silver Partner User	Account Layout	Account (Support) Layout	Account (Marketing) Layout	
Solution Manager	Account Layout	Account (Support) Layout	Account (Marketing) Layout	
Standard Platform User	Account Layout	Account (Support) Layout	Account (Marketing) Layout	
Standard User	Account Layout	Account (Support) Layout	Account (Marketing) Layout	
System Administrator	Account Layout	Account (Support) Layout	Account (Marketing) Layout	
System Administrator Test	Account Layout	Account (Support) Layout	Account (Marketing) Layout	

Edit Assignment

Edit Assignments

- >Edit Assignment
- (Select Page Layouts which should be changed) (Use: drag, Ctrl and Shift)
- Page Layout To Use: (Select replacement Page Layout) (For example Account (Marketing) Layout)
- Save

Selecting Page Layouts that should be changed

Edit Page Layout Assignment Help for this Page 

Account

The table below shows the page layout assignments for different record type and profile combinations. Use SHIFT + click or click and drag to select a range of adjacent cells. Use CTRL + click to select multiple cells that are not adjacent. Then choose a new page layout from the drop-down.

Record Types (1-3 of 3)			
Profiles	Master	RecordType1	RecordType2
Contract Manager	Account Layout	Account (Support) Layout	Account (Marketing) Layout
Custom: Marketing Profile	Account (Marketing) Layout	Account (Support) Layout	Account (Marketing) Layout
Custom: Sales Profile	Account (Sales) Layout	Account (Support) Layout	Account (Marketing) Layout
Custom: Support Profile	Account (Support) Layout	Account (Support) Layout	Account (Marketing) Layout
Customer Portal Manager Custom	Account Layout	Account (Support) Layout	Account (Marketing) Layout
Customer Portal Manager Standard	Account Layout	Account (Support) Layout	Account (Marketing) Layout
Gold Partner User	Account Layout	Account (Support) Layout	Account (Marketing) Layout
High Volume Customer Portal	Account Layout	Account (Support) Layout	Account (Marketing) Layout
Marketing User	Account Layout	Account (Support) Layout	Account (Marketing) Layout
Read Only	Account Layout	Account (Support) Layout	Account (Marketing) Layout
Silver Partner User	Account Layout	Account (Support) Layout	Account (Marketing) Layout
Solution Manager	Account Layout	Account (Support) Layout	Account (Marketing) Layout
Standard Platform User	Account Layout	Account (Support) Layout	Account (Marketing) Layout
Standard User	Account Layout	Account (Support) Layout	Account (Marketing) Layout
System Administrator	Account Layout	Account (Support) Layout	Account (Marketing) Layout
System Administrator Test	Account Layout	Account (Support) Layout	Account (Marketing) Layout

Save  Cancel 

Changed Page Layouts

Edit Page Layout Assignment Help for this Page 

Account

The table below shows the page layout assignments for different record type and profile combinations. Use SHIFT + click or click and drag to select a range of adjacent cells. Use CTRL + click to select multiple cells that are not adjacent. Then choose a new page layout from the drop-down.

Record Types (1-3 of 3)			
Profiles	Master	RecordType1	RecordType2
Contract Manager	Account Layout	Account (Support) Layout	Account (Marketing) Layout
Custom: Marketing Profile	Account (Marketing) Layout	Account (Support) Layout	Account (Marketing) Layout
Custom: Sales Profile	Account (Sales) Layout	Account (Support) Layout	Account (Marketing) Layout
Custom: Support Profile	Account (Support) Layout	Account (Support) Layout	Account (Marketing) Layout
Customer Portal Manager Custom	Account Layout	Account (Support) Layout	Account (Marketing) Layout
Customer Portal Manager Standard	Account (Marketing) Layout	Account (Marketing) Layout	Account (Marketing) Layout
Gold Partner User	Account (Marketing) Layout	Account (Marketing) Layout	Account (Marketing) Layout
High Volume Customer Portal	Account (Marketing) Layout	Account (Marketing) Layout	Account (Marketing) Layout
Marketing User	Account Layout	Account (Support) Layout	Account (Marketing) Layout
Read Only	Account Layout	Account (Support) Layout	Account (Marketing) Layout
Silver Partner User	Account (Marketing) Layout	Account (Support) Layout	Account (Marketing) Layout
Solution Manager	Account (Marketing) Layout	Account (Support) Layout	Account (Marketing) Layout
Standard Platform User	Account (Marketing) Layout	Account (Support) Layout	Account (Marketing) Layout
Standard User	Account Layout	Account (Support) Layout	Account (Marketing) Layout
System Administrator	Account Layout	Account (Marketing) Layout	Account (Marketing) Layout
System Administrator Test	Account Layout	Account (Support) Layout	Account (Marketing) Layout

Save  Cancel 