



# **SALESFORCE ADMINISTRATION**

---

Rapid Learning & Just In Time Support

# CONTENT

<b>1</b>	<b>INTRODUCTION.....</b>	<b>4</b>
1.1	What is Salesforce .....	4
1.2	Create salesforce.com development org .....	6
1.3	Login .....	9
<b>2</b>	<b>DATA MODEL .....</b>	<b>11</b>
2.1	Custom Objects .....	11
2.1.1	View list of Custom Objects .....	12
2.1.2	Create Custom Object .....	13
2.1.3	Edit Custom Object .....	16
2.1.4	Delete Custom Object .....	18
2.2	Fields .....	20
2.2.1	Create Field .....	22
2.2.1.1	Show Custom Fields .....	22
2.2.1.2	Step 1. Choose Field Type .....	23
2.2.1.3	Step 2. Define Field Parameters.....	24
2.2.1.4	Step 3. Establish field-level security.....	25
2.2.1.5	Step 4. Add to Page Layout .....	26
2.2.2	Field Types.....	27
2.2.2.1	Auto Number.....	28
2.2.2.2	Formula .....	29
2.2.2.3	Roll-Up Summary .....	31
2.2.2.4	Lookup Relationship.....	33
2.2.2.5	Master-Detail Relationship .....	37
2.2.2.6	Checkbox .....	40
2.2.2.7	Currency .....	41
2.2.2.8	Date .....	42
2.2.2.9	Date/Time .....	43
2.2.2.10	Email.....	44
2.2.2.11	Geolocation .....	45
2.2.2.12	Number .....	46
2.2.2.13	Percent .....	47
2.2.2.14	Phone .....	48
2.2.2.15	Picklist.....	49
2.2.2.15.1	Define default picklist value.....	50
2.2.2.15.2	Create Dependent picklist.....	50
2.2.2.16	Picklist (Multi-Select).....	53
2.2.2.17	Text.....	54
2.2.2.18	Text Area .....	55
2.2.2.19	Text Area (Long) .....	56
2.2.2.20	Text Area (Rich) .....	57
2.2.2.21	Text (Encrypted).....	58
2.2.2.22	URL .....	60
2.2.3	Standard Fields.....	61
2.2.3.1	Record Owner .....	61
2.3	Record Types.....	62
2.3.1	View Record Types of specific Object .....	63
2.3.2	Create new Record Type for specific Object.....	64

2.3.3	Edit picklist values available for Record Type .....	66
2.3.4	Assign Page Layout for each Profile and Record Type combination .....	69

# 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 you 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 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

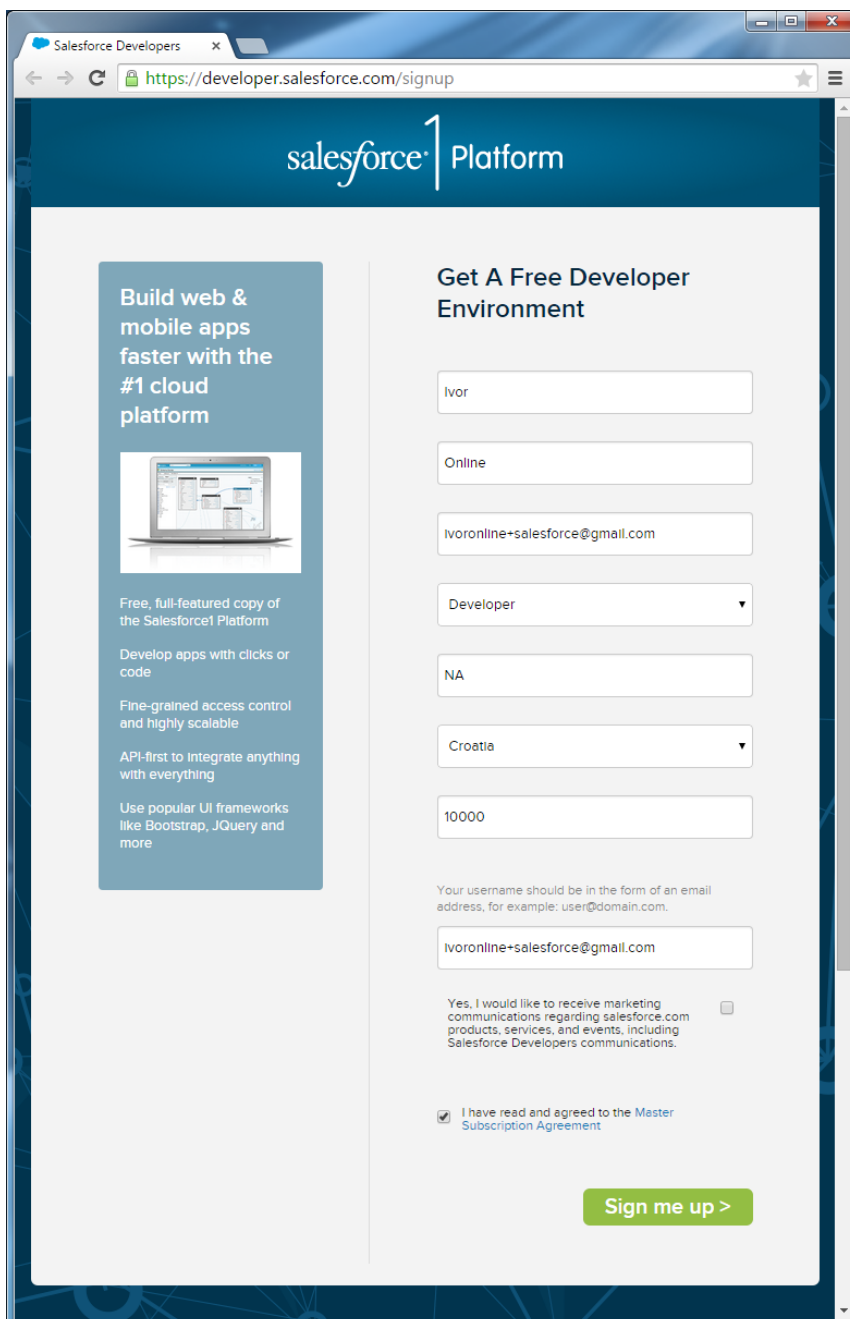
---

- 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](mailto:ivoronline+salesforce@gmail.com)
- Developer
- Company: NA
- Croatia
- Postal Code: 10000
- Username: [ivoronline+salesforce@gmail.com](mailto:ivoronline+salesforce@gmail.com)
- I have read and agreed: CHECK
- Sign me up

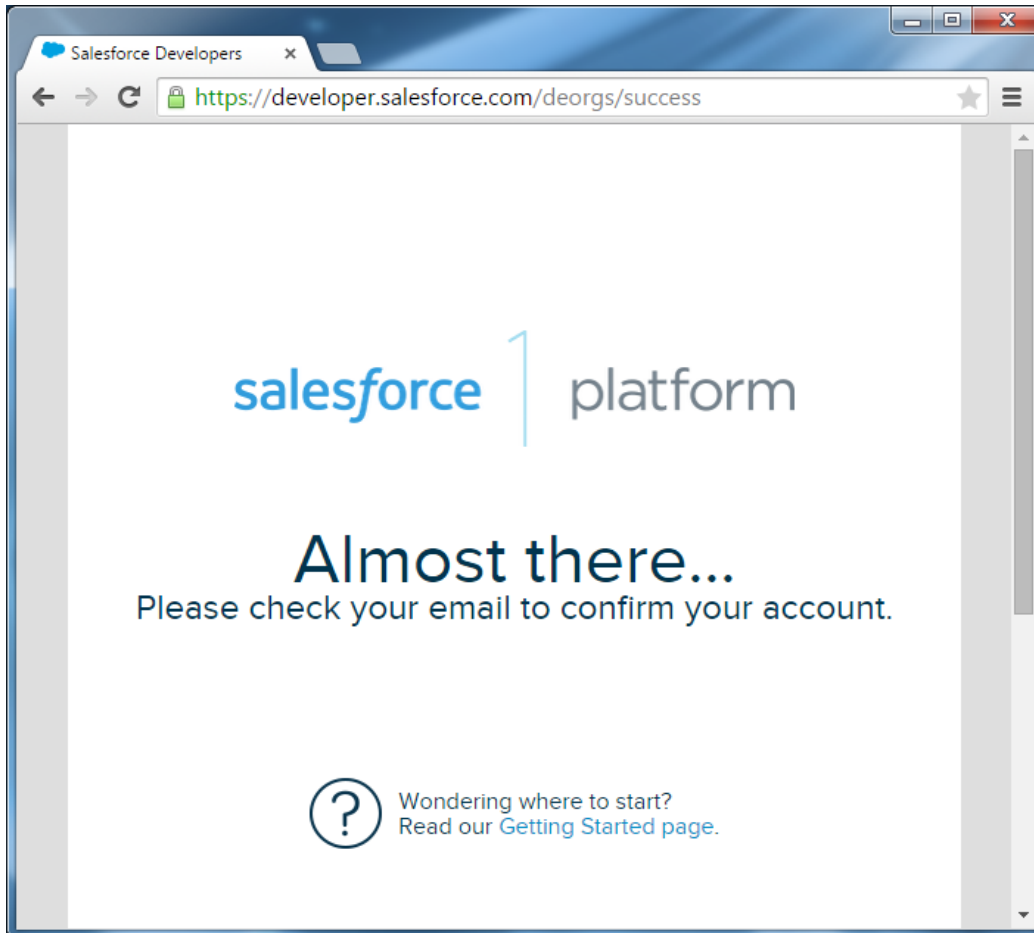


The screenshot shows the Salesforce Developer signup page in a web browser. The browser's address bar displays <https://developer.salesforce.com/signup>. The page features the Salesforce logo and the text 'Platform'. On the left, there is a promotional section titled 'Build web & mobile apps faster with the #1 cloud platform' with an image of a laptop and several bullet points: 'Free, full-featured copy of the Salesforce Platform', 'Develop apps with clicks or code', 'Fine-grained access control and highly scalable', 'API-first to integrate anything with everything', and 'Use popular UI frameworks like Bootstrap, JQuery and more'. The main section is titled 'Get A Free Developer Environment' and contains a form with the following fields: First name (Ivor), Last name (Online), Email (ivoronline+salesforce@gmail.com), Role (Developer), Company (NA), Country (Croatia), and Postal Code (10000). Below these fields, there is a note: 'Your username should be in the form of an email address, for example: user@domain.com.' and a field for the username (ivoronline+salesforce@gmail.com). There is also a checkbox for 'Yes, I would like to receive marketing communications regarding salesforce.com products, services, and events, including Salesforce Developers communications.' and a checked checkbox for 'I have read and agreed to the Master Subscription Agreement'. At the bottom right, there is a green button labeled 'Sign me up >'.

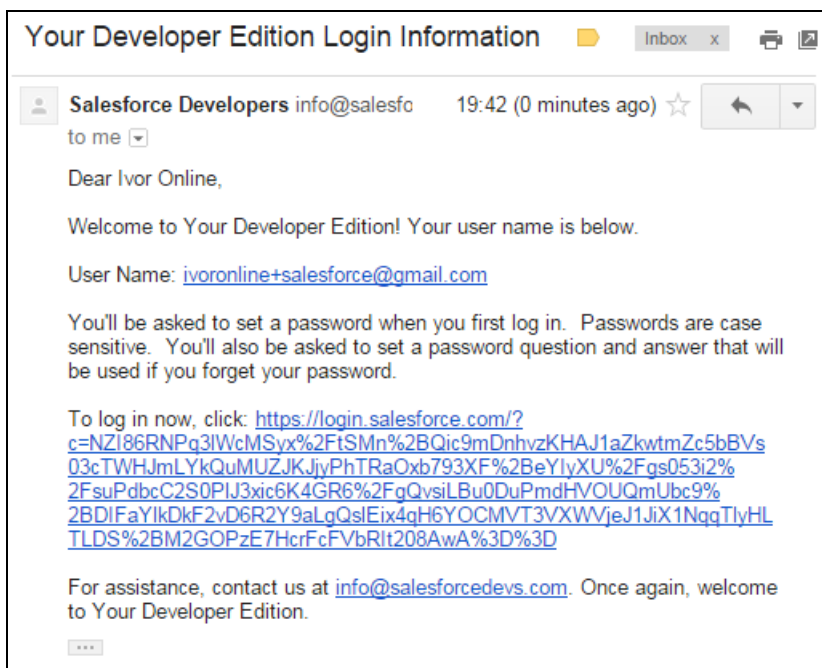
## Activate Account

- 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

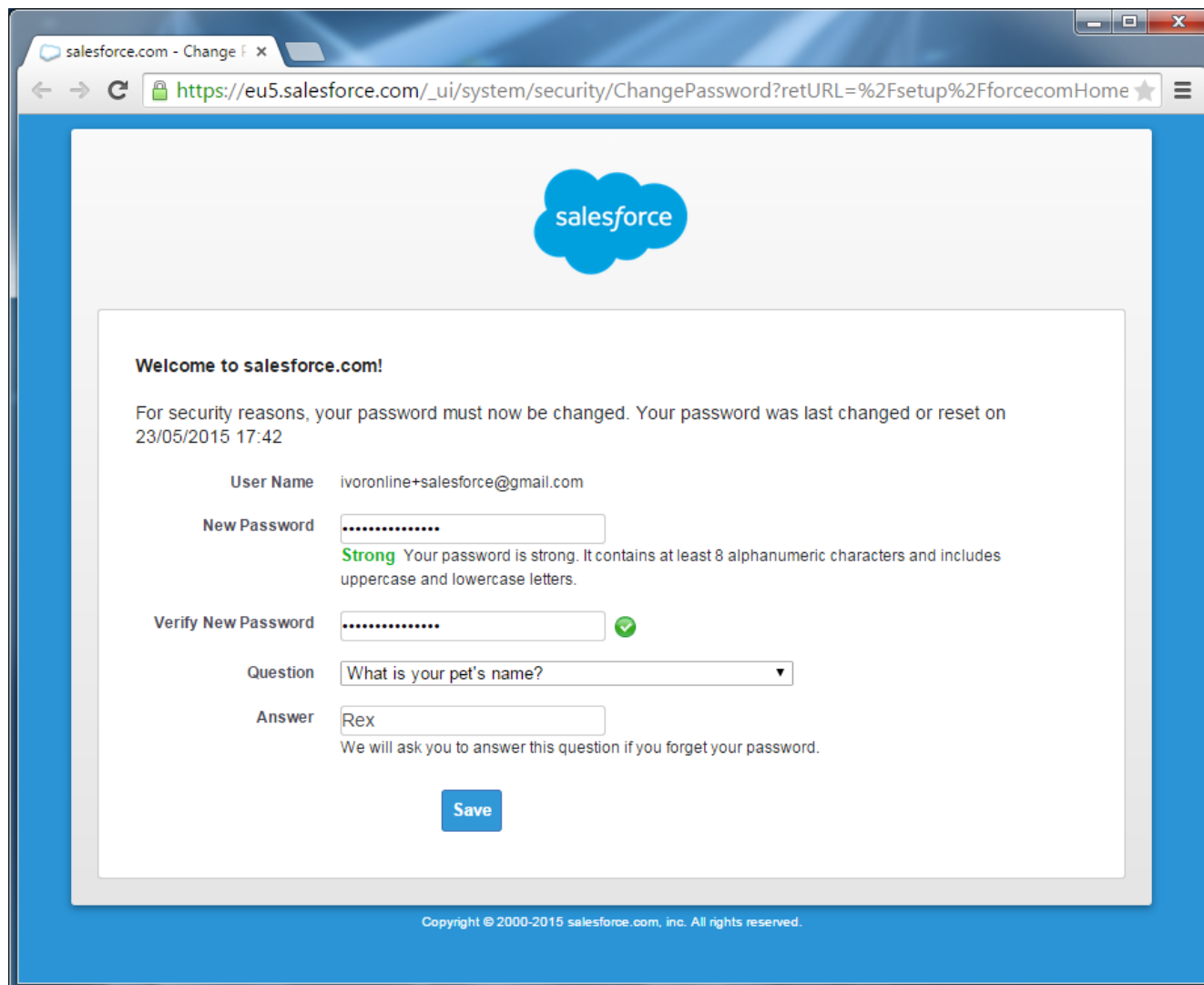
### Check Email



### Click on link in Email



## Enter Password



salesforce.com - Change x

https://eu5.salesforce.com/\_ui/system/security/ChangePassword?retURL=%2Fsetup%2FforcecomHome

**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

User Name ivoronline+salesforce@gmail.com

New Password .....

**Strong** Your password is strong. It contains at least 8 alphanumeric characters and includes uppercase and lowercase letters.

Verify New Password ..... ✓

Question What is your pet's name?

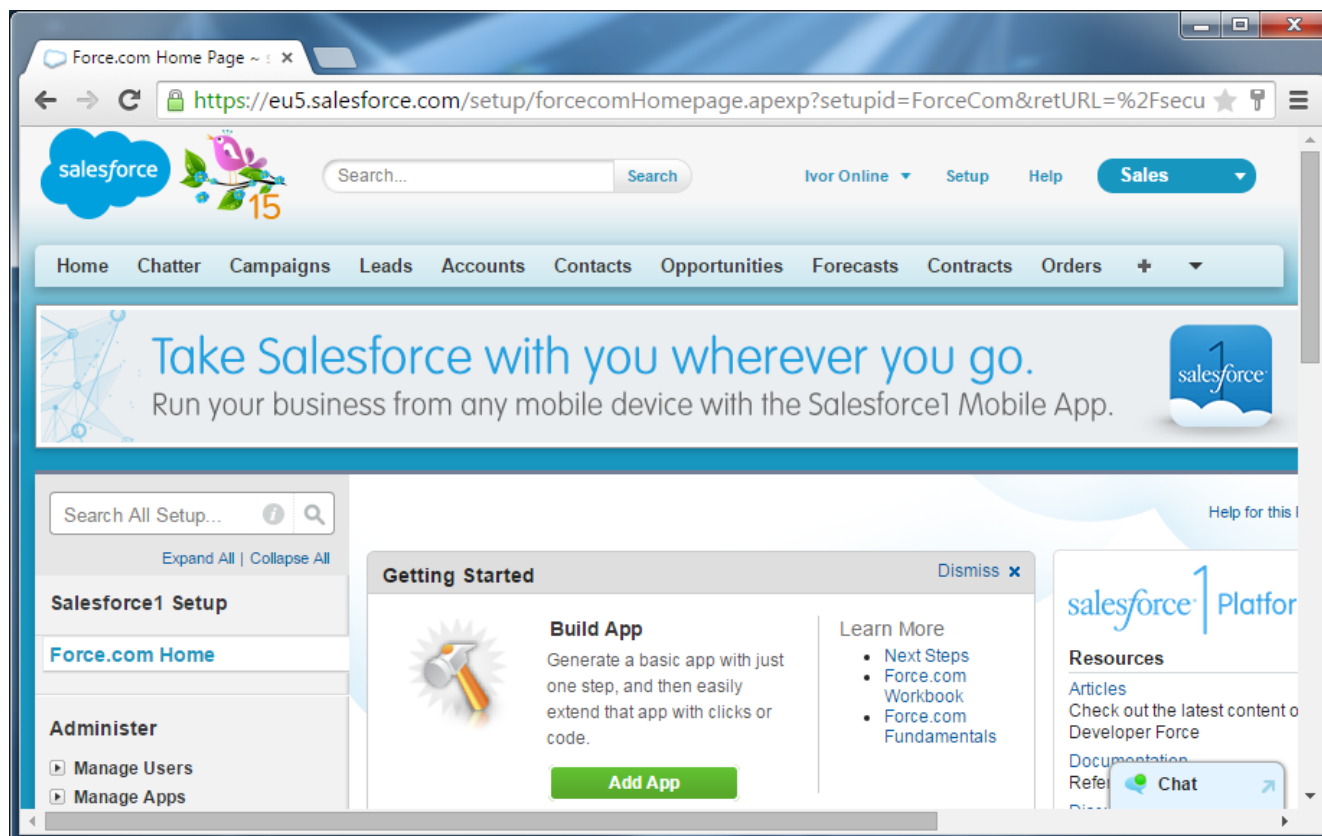
Answer Rex

We will ask you to answer this question if you forget your password.

**Save**

Copyright © 2000-2015 salesforce.com, inc. All rights reserved.

## Initial screen



Force.com Home Page x

https://eu5.salesforce.com/setup/forcecomHomepage.apexp?setupid=ForceCom&retURL=%2Fsecu

salesforce 15

Search... Search

Ivor Online Setup Help Sales

Home Chatter Campaigns Leads Accounts Contacts Opportunities Forecasts Contracts Orders +

Take Salesforce with you wherever you go.  
Run your business from any mobile device with the Salesforce1 Mobile App.

1 salesforce

Search All Setup... Expand All Collapse All

**Salesforce1 Setup**

**Force.com Home**

**Administer**

- Manage Users
- Manage Apps

**Getting Started** Dismiss x

**Build App**

Generate a basic app with just one step, and then easily extend that app with clicks or code.

**Add App**

Learn More

- Next Steps
- Force.com Workbook
- Force.com Fundamentals

**Resources**

Articles  
Check out the latest content o Developer Force

Documentation  
Refer  
Chat



# 1.3 Login

## Info

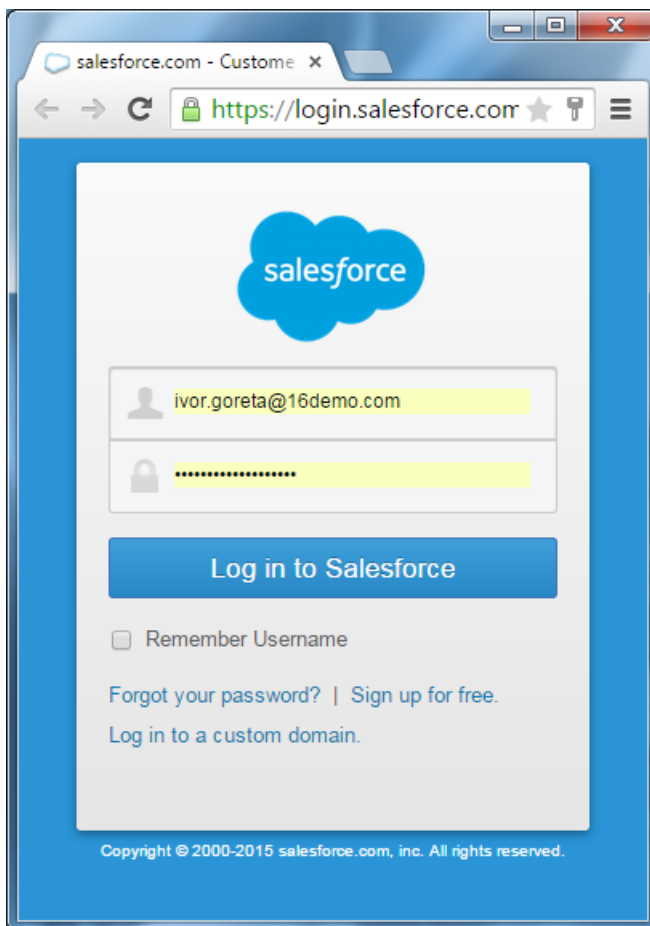
---

- 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

---

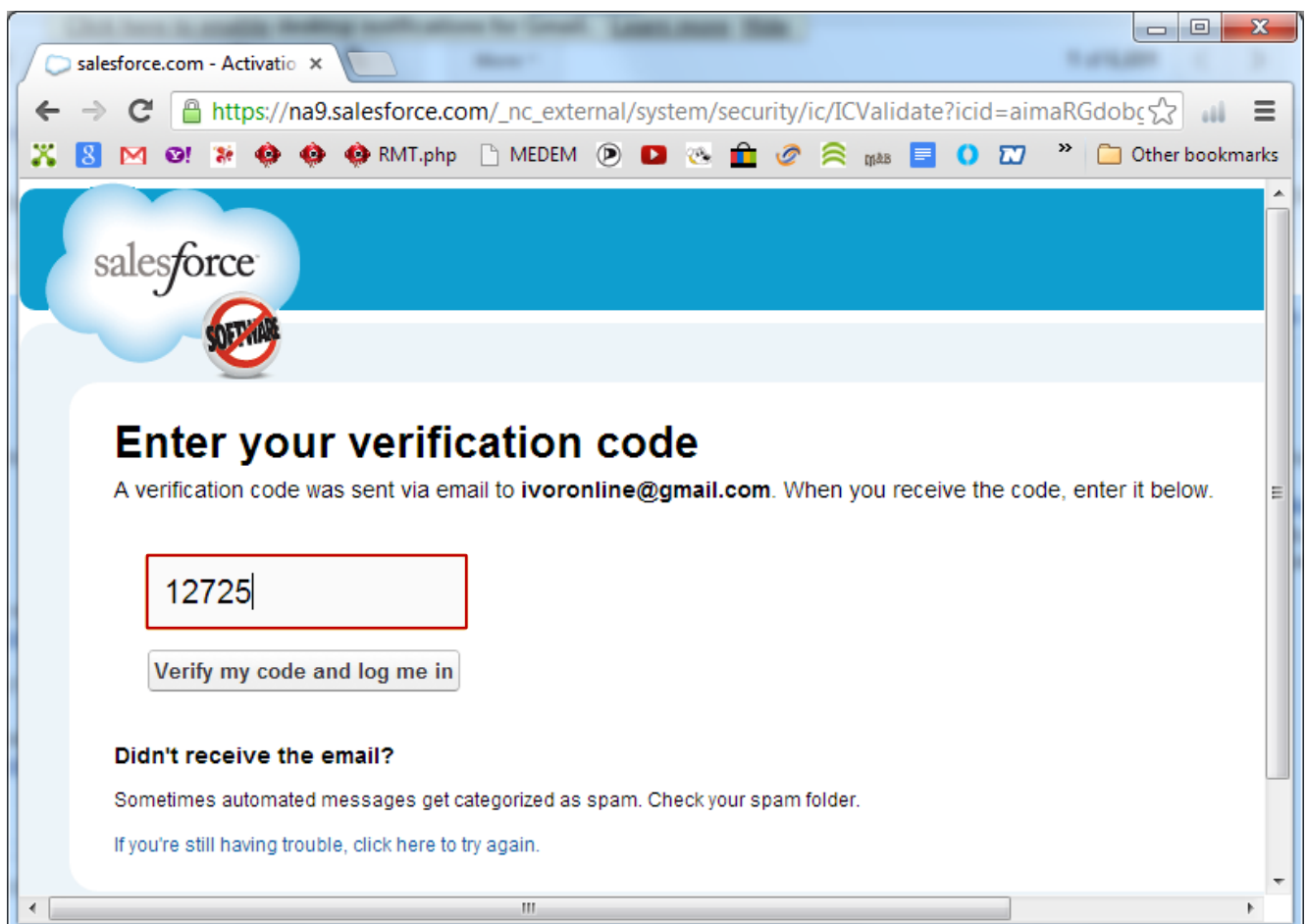
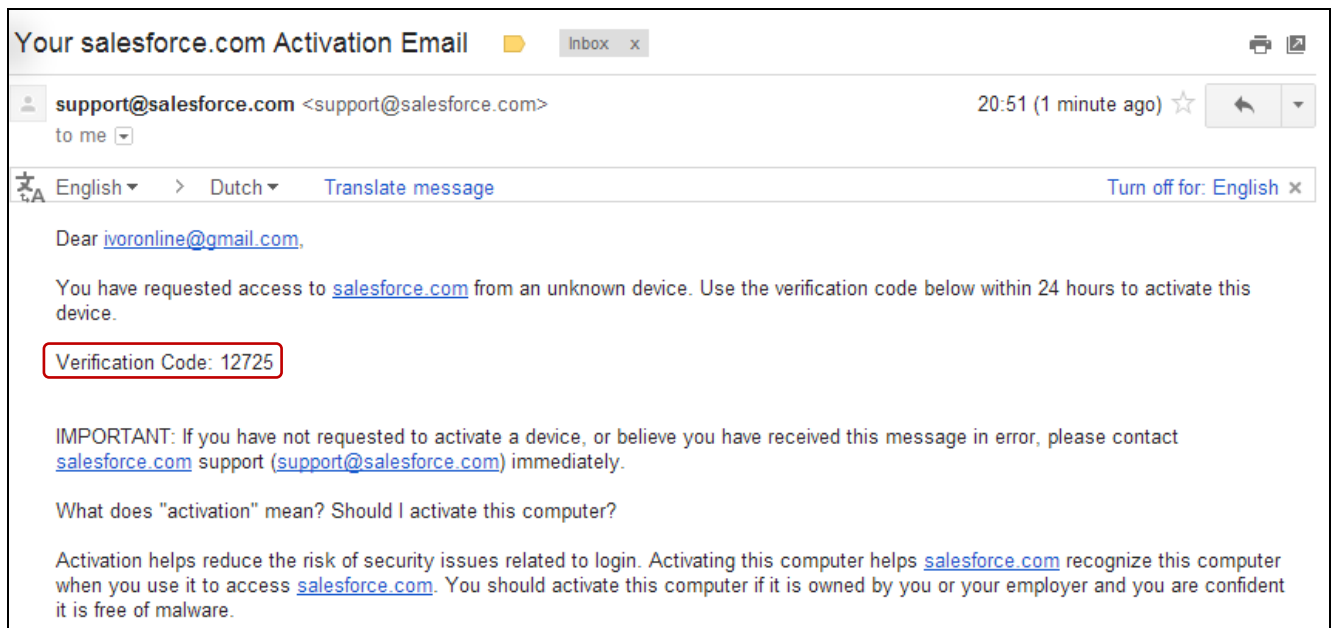
- Start Web Browser
- URL: <https://login.salesforce.com>
- User Name: [ivor.goreta@16demo.com](mailto:ivor.goreta@16demo.com)
- Password: B...0
- Login



## 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



# 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

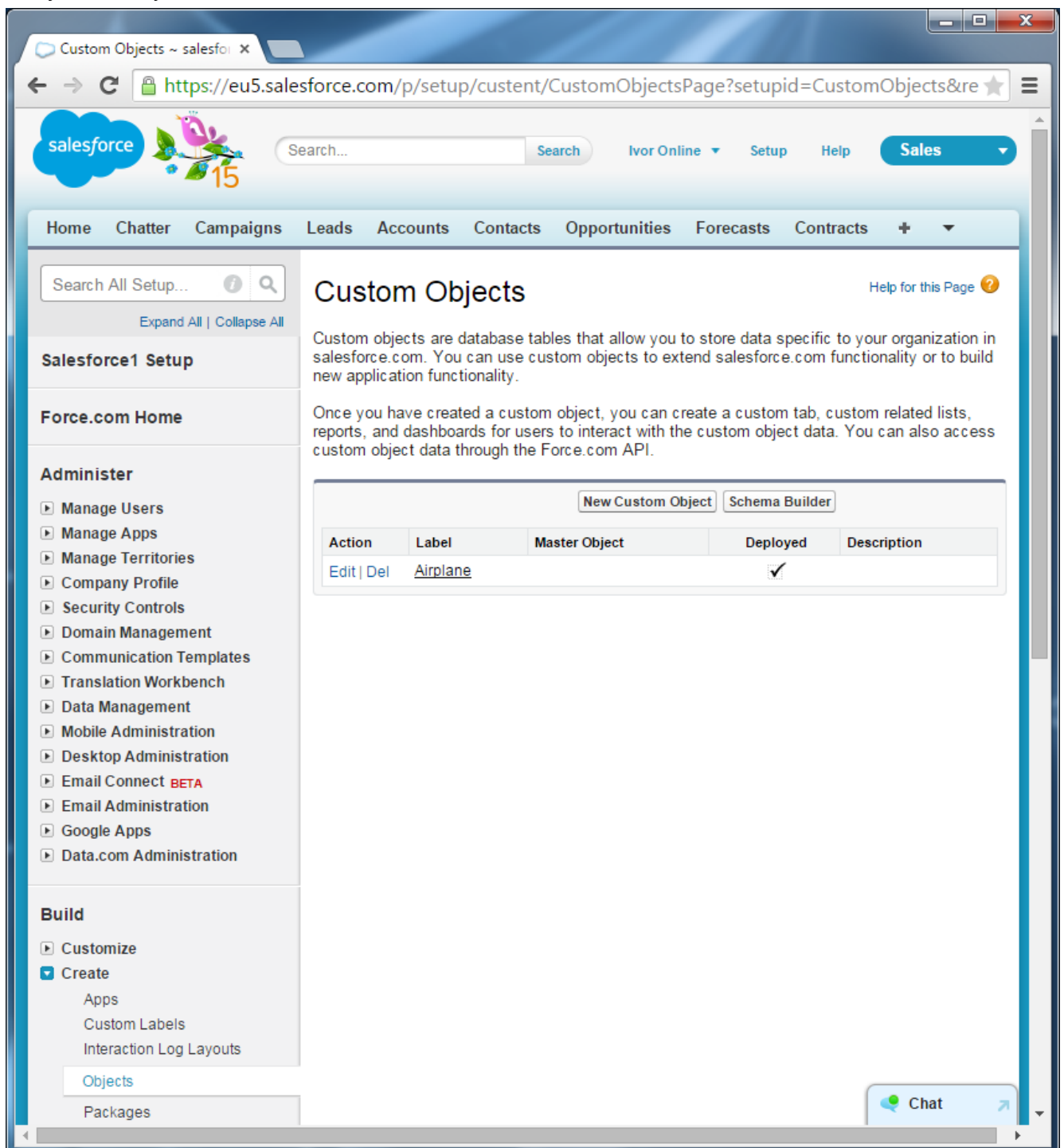
### Info

- 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 for Custom Objects. The left sidebar contains the navigation menu with sections: Salesforce1 Setup, Force.com Home, Administer (with sub-items like Manage Users, Manage Apps, etc.), and Build (with sub-items like Customize, Create, and Objects). The main content area is titled 'Custom Objects' and includes a search bar, a description of custom objects, and a table of existing objects. The table has columns for Action, Label, Master Object, Deployed, and Description. One object, 'Airplane', is listed with a checkmark in the Deployed column. Buttons for 'New Custom Object' and 'Schema Builder' are visible above the table.

Custom Objects ~ salesfoi x

https://eu5.salesforce.com/p/setup/custent/CustomObjectsPage?setupid=CustomObjects&re

salesforce 15

Search... Search Ivor Online Setup Help Sales

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

**Custom Objects** 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.

New Custom Object Schema Builder

Action	Label	Master Object	Deployed	Description
Edit   Del	Airplane		✓	

Chat

## 2.1.2 Create Custom Object

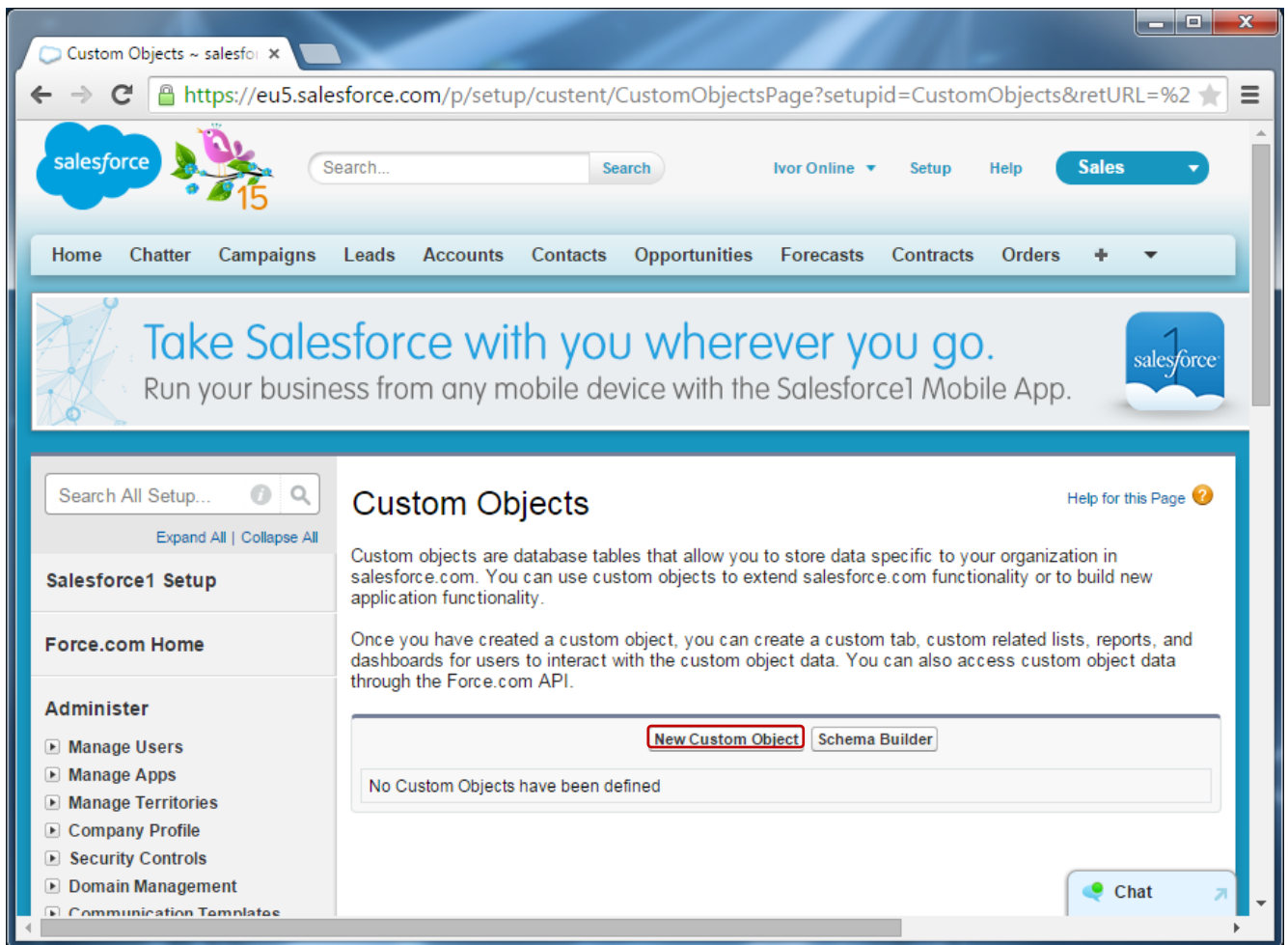
### Info

- 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



Edit Custom Object: Airplane

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

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

**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
- Report Types
- Tabs
- Action Link Templates **New!**
- Global Actions
- Workflow & Approvals

**Develop**

- Schema Builder
- Canvas App Previewer
- Installed Packages
- AppExchange Marketplace
- Critical Updates

**Deploy**

- Deployment Settings
- Deployment Status

**Monitor**

**Edit Custom Object: Airplane**

Help for this Page

**Custom Object Definition Edit** Save Save & New Cancel

**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 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 --None--

**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

Created Object (Contains Standard Fields)

Custom Object: Airplane

https://eu5.salesforce.com/01I24000000txC4?setupid=CustomObjects

Search... Ivor Online Setup Help Sales

Home Chatter Campaigns Leads Accounts Contacts Opportunities Forecasts Contracts Orders +

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 Object Definition Detail** [Edit] [Delete]

Field	Value	Field	Value
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
Created By	Ivor Online, 23/05/2015 18:03	Modified By	Ivor Online, 23/05/2015 18:03

**Standard Fields** [Standard Fields Help]

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)		

[Chat]

Created object is listed under Custom Objects

Custom Objects ~ salesfo

https://eu5.salesforce.com/p/setup/custent/CustomObjectsPage?setupid=CustomObjects&retUR

Search... Ivor Online Setup Help Sales

Home Chatter Campaigns Leads Accounts Contacts Opportunities Forecasts Contracts Orders +

Search All Setup... Expand All Collapse All

**Salesforce1 Setup**

**Force.com Home**

**Administer**

- Manage Users
- Manage Apps
- Manage Territories
- Company Profile

**Custom Objects** [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.

[New Custom Object] [Schema Builder]

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

[Chat]



## 2.1.3 Edit Custom Object

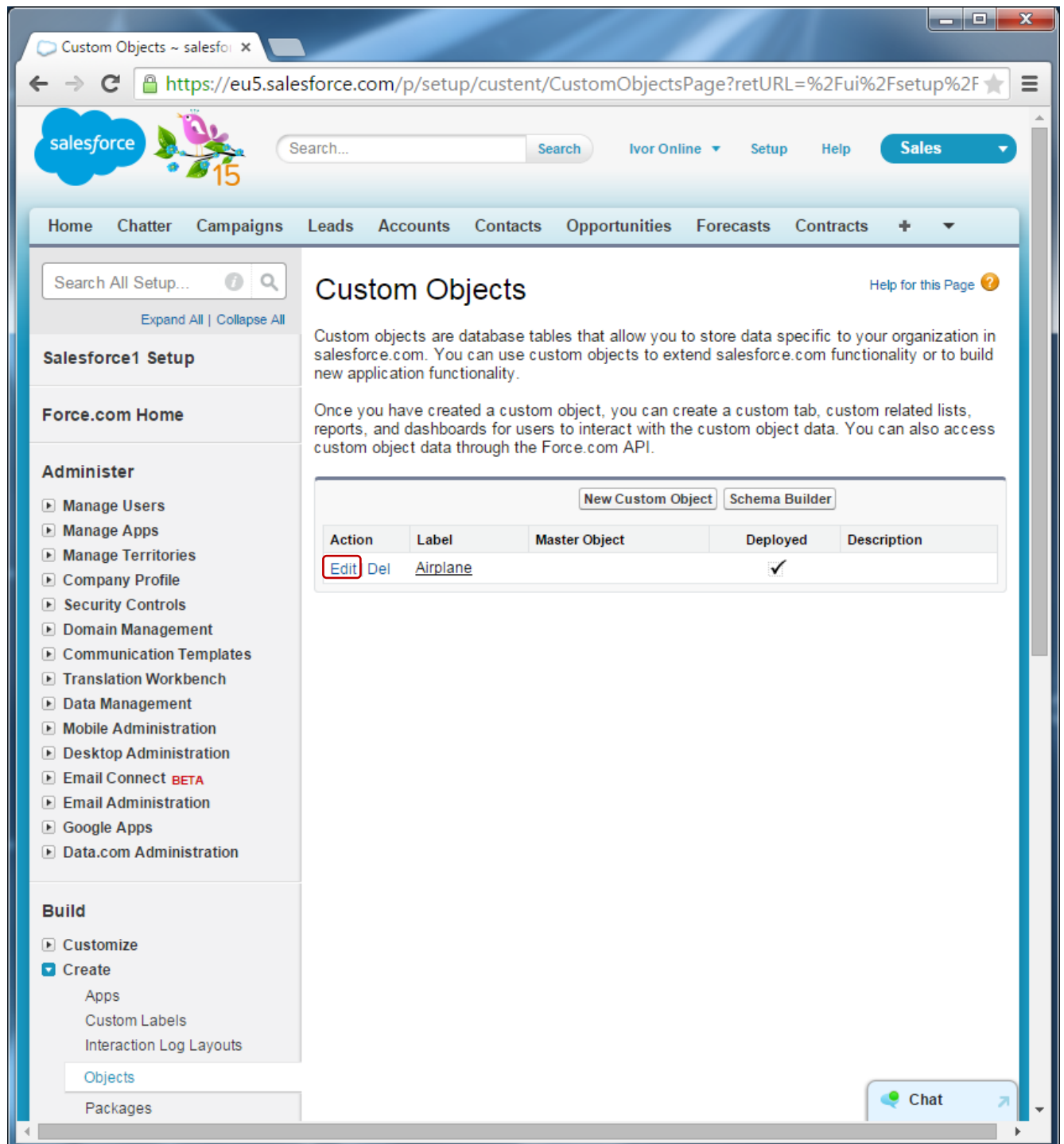
### Info

- 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. The left sidebar contains the navigation menu with sections: Salesforce1 Setup, Force.com Home, Administer (with sub-items like Manage Users, Manage Apps, etc.), and Build (with sub-items like Customize, Create, etc.). The main content area is titled 'Custom Objects' and includes a search bar, a description of custom objects, and a table of existing objects. The table has columns for Action, Label, Master Object, Deployed, and Description. One object, 'Airplane', is listed with an 'Edit' link highlighted in a red box. The 'Deployed' column for 'Airplane' shows a checkmark.

Action	Label	Master Object	Deployed	Description
<a href="#">Edit</a>	<a href="#">Del</a>	<a href="#">Airplane</a>	✓	



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

Edit Custom Object: Airplane

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

salesforce

15

Search...

Search

Ivor Online

Setup

Help

Sales

HomeChatterCampaignsLeadsAccountsContactsOpportunitiesForecastsContractsOrdersCasesSolutions

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

Report Types

Tabs

Action Link Templates New!

Global Actions

Workflow & Approvals

Develop

Schema Builder

Canvas App Previewer

Installed Packages

AppExchange Marketplace

Critical Updates

Deploy

Deployment Settings

Deployment Status

Monitor

Edit Custom Object

Airplane

Help for this Page

Custom Object Definition

Edit

Save

Save & New

Cancel

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

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

—None—

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

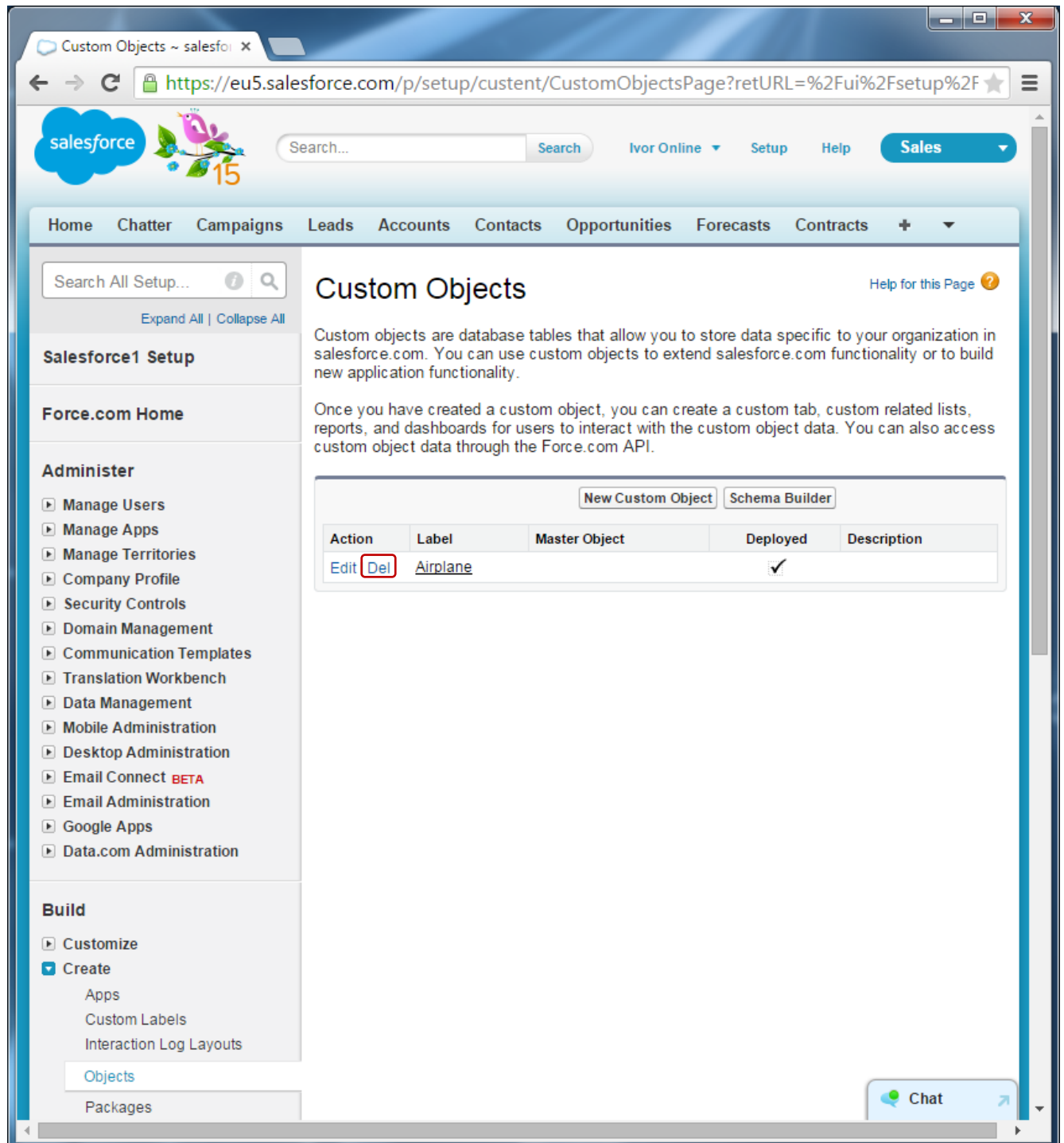
### Info

- 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



The screenshot shows the Salesforce Setup interface for Custom Objects. The left sidebar contains navigation links for Setup, Home, and various administrative and build tasks. The main content area displays the 'Custom Objects' page, which includes a search bar, a list of custom objects, and a table of objects. The table has columns for Action, Label, Master Object, Deployed, and Description. The 'Airplane' object is listed with a 'Del' button next to it.

Custom Objects ~ salesfoi x

https://eu5.salesforce.com/p/setup/custent/CustomObjectsPage?retURL=%2Fui%2Fsetup%2F

Search... Search Ivor Online Setup Help Sales

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

**Custom Objects** 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.

New Custom Object Schema Builder


Action	Label	Master Object	Deployed	Description
Edit Del	Airplane		✓	

Chat

Confirm Custom Object Delete - Google Chrome

https://na9.salesforce.com/ui/setup/confirm/CustomEntityConfirmDeletePage?name=Airplane

## Custom Object: Airplane

 Deleting a custom object does the following:

- Removes the object from AppExchange packages
- Permanently erases the object's data records currently in the Recycle Bin
- Permanently erases the custom tab and list views for the object
- Deletes workflow rules and actions that use the object
- Hides the custom object definition and all related definitions
- Hides the object's data records and all related data records
- Disables report types for which this is the main object
- Disables custom reports for which this is the main object
- Deactivates custom formula fields on the object
- Deactivates custom validation rules and approval processes on the object

Before deleting custom objects, you can keep a record of the data by clicking Setup | Data Management | [Data Export](#).

Deleted objects appear in the deleted objects list for 15 days. During this time you can restore an object and the data stored in it, or permanently erase the object and its data. After 15 days, the object and its data are permanently deleted.

☒ Yes, I want to delete the custom object.

Delete

Cancel

## 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
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Replace</a>	<a href="#">Active</a>	Active__c	Picklist			Ivor Online, 23/05/2015 17:42
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Replace</a>	<a href="#">Customer Priority</a>	CustomerPriority__c	Picklist			Ivor Online, 23/05/2015 17:42
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Number of Locations</a>	NumberOfLocations__c	Number(3, 0)			Ivor Online, 23/05/2015 17:42
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Replace</a>	<a href="#">SLA</a>	SLA__c	Picklist			Ivor Online, 23/05/2015 17:42
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">SLA Expiration Date</a>	SLAExpirationDate__c	Date			Ivor Online, 23/05/2015 17:42
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">SLA Serial Number</a>	SLASerialNumber__c	Text(10)			Ivor Online, 23/05/2015 17:42
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Replace</a>	<a href="#">Upsell Opportunity</a>	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
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Manager</a>	Manager__c	Lookup(Employee)		Ivor Goreta, 03/07/2012 12:32	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">User</a>	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"><li>• The relationship field is required on all detail records.</li><li>• The ownership and sharing of a detail record are determined by the master record.</li><li>• When a user deletes the master record, all detail records are deleted.</li><li>• You can create rollup summary fields on the master record to summarize the detail records.</li></ul> 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

Sector

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

Sector

i

Description

Choose company sector

Help Text

Choose company sector

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

New Custom Field

Help for this Page ?

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"><li>The relationship field is required on all detail records.</li><li>The ownership and sharing of a detail record are determined by the master record.</li><li>When a user deletes the master record, all detail records are deleted.</li><li>You can create rollup summary fields on the master record to summarize the detail records.</li></ul> 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.
<input type="radio"/> Currency	Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
<input type="radio"/> Date	Allows users to enter a date or pick a date from a popup calendar.
<input type="radio"/> 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.
<input type="radio"/> 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.
<input type="radio"/> Geolocation	(Beta) Allows users to define locations.
<input type="radio"/> Number	Allows users to enter any number. Leading zeros are removed.
<input type="radio"/> Percent	Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.
<input type="radio"/> Phone	Allows users to enter any phone number. Automatically formats it as a phone number.
<input type="radio"/> Picklist	Allows users to select a value from a list you define.
<input type="radio"/> Picklist (Multi-Select)	Allows users to select multiple values from a list you define.
<input type="radio"/> Text	Allows users to enter any combination of letters and numbers.
<input type="radio"/> Text Area	Allows users to enter up to 255 characters on separate lines.
<input type="radio"/> Text Area (Long)	Allows users to enter up to 32,768 characters on separate lines.
<input type="radio"/> Text Area (Rich)	Allows users to enter formatted text, add images and links. Up to 32,768 characters on separate lines.
<input type="radio"/> Text (Encrypted)	Allows users to enter any combination of letters and numbers and store them in encrypted form.
<input type="radio"/> 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

☐

Generate Auto Number for existing records

Field Name

MyAutoNumber

i

Description

MyAutoNumber Field Description

Help Text

MyAutoNumber Help

i

External ID

☒ 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

2

▼

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\_c + 32 [More Examples ...](#)

Simple Formula

Advanced Formula

Select Field Type

Insert Field

Insert Operator

Account

-- Insert Merge Field --

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 (As defined below in this chapter)
- [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

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

**Select Object to Summarize** ! = Required Information

Master Object: Employee

Summarized Object: Equipment

**Select Roll-Up Type**

☒ COUNT

☐ SUM

☐ MIN

☐ MAX

Field to Aggregate: --None--

**Filter Criteria**

☐ All records should be included in the calculation

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

Field	Operator	Value	
<span>Created Date</span>	<span>greater than</span>	<span>01/01/2000</span>	AND
<span>--None--</span>	<span>--None--</span>		AND
<span>--None--</span>	<span>--None--</span>		AND
<span>--None--</span>	<span>--None--</span>		AND
<span>--None--</span>	<span>--None--</span>		

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 Summary: 1

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 filter 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



The screenshot shows the 'New Relationship' wizard in Salesforce. At the top, it says 'Order' and 'New Relationship' with a 'Help for this Page' link. The main heading is 'Step 2. Choose the related object'. Below this, there are 'Previous', 'Next', and 'Cancel' buttons. The instruction reads: 'Select the other object to which this object is related.' Underneath, there is a 'Related To' label followed by a dropdown menu that currently displays '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

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

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

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

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

New Account

Help for this Page ?

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&lkst=

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
<a href="#">00001002</a>	Seeking guidance on electrical wiring installation for GC5060	Stella Pavlova	United Oil & Gas Corp.	Closed
<a href="#">00001016</a>	Maintenance guidelines for generator unclear	Edna Frank	GenePoint	New
<a href="#">00001026</a>	Orchestrator Create Case			Working
<a href="#">00001027</a>	Orchestrator Create Case			Closed
<a href="#">00001028</a>	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

**Followers**

No followers.

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

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
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">TestAccount</a>		
Contact Name	<a href="#">Eddie Frank</a>	Contact Phone	(888) 887-3456
Account Name	<a href="#">GenePoint</a>	Contact Email	<a href="#">efrank@genepoint.com</a>
Type	Other	Case Origin	Web

**MyAccounts**

New Account

MyAccounts Help ?

Action	Account Name	Billing City	Phone
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">TestAccount</a>		

## 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 rollout 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 the 'New Relationship' configuration page for the 'Equipment' object. The page is titled 'Equipment' and 'New Relationship'. A 'Help for this Page' link with a question mark icon is in the top right. The progress bar indicates 'Step 2. Choose the related object' out of 6 steps. Navigation buttons 'Previous', 'Next', and 'Cancel' are present. The instruction 'Select the other object to which this object is related.' is displayed. The 'Related To' field is a dropdown menu with 'Employee' selected.

Equipment		Help for this Page ?
<b>New Relationship</b>		
Step 2. Choose the related object		Step 2 of 6
		Previous Next Cancel
Select the other object to which this object is related.		
Related To	<input type="text" value="Employee"/>	

## 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

Previous Next Cancel

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

Previous Save & New Save Cancel

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
<input checked="" type="checkbox"/>	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' section with a 'New Equipment' form. The form has a title bar with 'Equipment Edit' and buttons for 'Save', 'Save & New', and 'Cancel'. Below the title bar is the 'Information' section. It contains four fields: 'Equipment Name' with the value 'Desktop 001', 'Type' with a dropdown menu showing 'Desktop', 'Brand' with a dropdown menu showing 'HP', and 'Employee' with a dropdown menu showing 'Employee\_Ivor' 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\_Ivor' record. At the top, there is a header with 'Employee\_Ivor' and a 'Customize Page | Edit Layout | Printable View | Help for this Page' link. Below the header is a navigation bar with links: '< Back to List: Custom Object Definitions', 'Open Activities [0]', 'Activity History [0]', 'Notes & Attachments [0]', 'Leave Requests [1]', 'Employees [0]', and 'Equipment [1]'. A mouse cursor is hovering over the 'Equipment [1]' link, which has triggered a popup. The popup is titled 'Equipment' and has a 'New Equipment' button and an 'Equipment Help' link. It contains a table with two columns: 'Action' and 'Equipment Name'. The table has one row with 'Edit | Del' in the 'Action' column and 'Desktop 001' in the 'Equipment Name' column. Below the table, there are fields for 'User' (Ivor Goreta) and 'City'.

This screenshot is a close-up of the 'Equipment' popup. It shows the title bar with 'Equipment', 'New Equipment', and 'Equipment Help'. Below the title bar is a table with two columns: 'Action' and 'Equipment Name'. The table has one row with 'Edit | Del' in the 'Action' column and 'Desktop 001' in the 'Equipment Name' column.

# 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

MyCheckbox

i

Default Value

☒ Checked

☐ Unchecked

Field Name

MyCheckbox

i

Description

MyCheckbox Field Description

Help Text

MyCheckbox Field Help

i



# 2.2.2.7 Currency

## Info

- This chapter shows how to create Currency Field.

## Procedure

- Show Object Fields
- Choose Field Type: Currency (As defined below in this chapter)
- Enter the details
- 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

MyCurrency

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

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

MyCurrency

i

Description

MyCurrency Field Description

Help Text

MyCurrency Field Help

i

Required

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

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

# 2.2.2.8 Date

## Info

This chapter shows how to create Date Field.

## Procedure

- Show Object Fields
- Choose Field Type: Date (As defined below in this chapter)
- Enter the details
- 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

MyDate

i

Field Name

MyDate

i

Description

MyDate Field Description

Help Text

MyDate Field Help

i

Required

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

Default Value

Show Formula Editor

Today() + 7

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

# 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 (As defined below in this chapter)
- Enter the details
- 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

MyDateTime

i

Field Name

MyDateTime

i

Description

MyDateTime Field Description

Help Text

MyDateTime Field Help

i

Required

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

Default Value

Show Formula Editor

DATETIMEVALUE ("2005-11-15 17:00:00")

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 (As defined below in this chapter)
- [Enter the details](#)
- [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  [i](#)

Field Name  [i](#)

Description

Help Text  [i](#)

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

Unique ☒ Do not allow duplicate values

External ID ☒ Set this field as the unique record identifier from an external system

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

# 2.2.2.11 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

MyGeolocation

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

0

Number of digits to the right of the decimal point

Field Name

MyGeolocation

i

Description

MyGeolocation Field Description

Help Text

MyGeolocation Field Help

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 (As defined below in this chapter)
- Enter the details
- 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

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

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

i

Description

MyNumber Field Description

Help Text

MyNumber Field Help

i

Required

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

Unique

☒ Do not allow duplicate values

External ID

☒ Set this field as the unique 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 (As defined below in this chapter)
- Enter the details
- 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

MyPercent

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

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

MyPercent

i

Description

MyPercent Field Description

Help Text

MyPercent Field Help

i

Required

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

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

# 2.2.2.14 Phone

## Info

- This chapter shows how to create Phone Field.

## Procedure

- Show Object Fields
- Choose Field Type: Phone (As defined below in this chapter)
- Enter the details
- 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

MyPhone

i

Field Name

MyPhone

i

Description

MyPhone Field Description

Help Text

MyPhone Field Help

i

Required

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

Default Value

Show Formula Editor

"MyPhone default value"

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



## 2.2.2.15 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

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.

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

# 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

<div>Picklist Values</div> <div><div>NewReorderReplacePrintable View</div><div>Chart Colors</div><div>Picklist Values Help</div></div>				
Action	Values	Default	Chart Colors	Modified By
<a href="#">Edit</a>   <a href="#">Del</a>	Construction	<input checked="" type="checkbox"/>	Assigned dynamically	Ivor Goreta, 28/06/2013 10:49
<a href="#">Edit</a>   <a href="#">Del</a>	Education	<input type="checkbox"/>	Assigned dynamically	Ivor Goreta, 24/06/2013 18:57
<a href="#">Edit</a>   <a href="#">Del</a>	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 default.

Sector

Construction

Default

☒ 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.

SectorConstruction

Products--None--

InformationSky scraperCottageBridge

SectorEducation

Products--None--

InformationBook on MathematicsBook on PhysicsBook on Chemistry

SectorHealth

Products--None--

InformationCure for AIDSCure 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: CHECK
- Use first value as default value: CHECK
- 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: CHECK
- Use first value as default value: CHECK
- 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
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Replace</a>	<a href="#">Active</a>	Active__c		Picklist	
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Replace</a>	<a href="#">Customer Priority</a>	CustomerPriority__c		Picklist	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Number of Locations</a>	NumberofLocations__c		Number(3, 0)	
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Replace</a>	<a href="#">Products</a>	Products__c		Picklist	Sector
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Replace</a>	<a href="#">Sector</a>	Sector__c		Picklist	
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Replace</a>	<a href="#">SLA</a>	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
<a href="#">Edit</a>   <a href="#">Del</a>	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

- 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.

#### Legend

[Excluded Value](#)[Included Value](#)

Click button to include or exclude selected values from the dependent picklist:

[Include Values](#) [Exclude Values](#)

Showing Columns: 1 - 3 (of 3) < Previous   Next > <a href="#">View All</a> <a href="#">Go to</a>			
Sector:	<a href="#">Construction</a>	<a href="#">Education</a>	<a href="#">Health</a>
Products:	<a href="#">Book on Mathematics</a>	<a href="#">Book on Mathematics</a>	<a href="#">Book on Mathematics</a>
	<a href="#">Book on Physics</a>	<a href="#">Book on Physics</a>	<a href="#">Book on Physics</a>
	<a href="#">Book on Chemistry</a>	<a href="#">Book on Chemistry</a>	<a href="#">Book on Chemistry</a>
	<a href="#">Cure for AIDS</a>	<a href="#">Cure for AIDS</a>	<a href="#">Cure for AIDS</a>
	<a href="#">Cure for common flue</a>	<a href="#">Cure for common flue</a>	<a href="#">Cure for common flue</a>
	<a href="#">Sky scraper</a>	<a href="#">Sky scraper</a>	<a href="#">Sky scraper</a>
	<a href="#">Cottage</a>	<a href="#">Cottage</a>	<a href="#">Cottage</a>
	<a href="#">Bridge</a>	<a href="#">Bridge</a>	<a href="#">Bridge</a>
Showing Columns: 1 - 3 (of 3) < Previous   Next > <a href="#">View All</a>			

Click button to include or exclude selected values from the dependent picklist:

[Include Values](#) [Exclude Values](#)

# 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) (As defined below in this chapter)
- Enter the details
- 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: CHECK
- Use first value as default value: CHECK
- \*# 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

MyPicklistMultiSelect

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

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

# Visible Lines

4

Field Name

MyPicklistMultiSelect

i

Description

MyPicklistMultiSelect Field Description

Help Text

MyPicklistMultiSelect Field Help

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

MyText

i

Please enter the maximum length for a text field below.

Length

255

Field Name

MyText

i

Description

MyText Field Description

Help Text

MyText Field Help

i

Required

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

Unique

☒ Do not allow duplicate values

- ☒ Treat "ABC" and "abc" as duplicate values (case insensitive)
- ☐ Treat "ABC" and "abc" as different values (case sensitive)

External ID

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

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 (As defined below in this chapter)
- Enter the details
- 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

☒ 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

PreviousNextCancel

Field Label

MyTextAreaLong

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

32768

(Max 32,768)

# Visible Lines

3

Field Name

MyTextAreaLong

i

Description

MyTextAreaLong Field Description

Help Text

MyTextAreaLong Field Help

i

Default Value

Show Formula Editor

"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 (As defined below in this chapter)
- Enter the details
- 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

MyTextAreaRich

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

32768

(Max 32,768)

# Visible Lines

25

Field Name

MyTextAreaRich

i

Description

MyTextAreaRich Field Description

Help Text

MyTextAreaRich Field Help

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) (As defined below in this chapter)
- [Enter the details](#)
- [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

MyTextEncrypted

i

Please enter the maximum length for a text field below.

Length

175

Field Name

MyText

i

Description

MyTextEncrypted Field Description

Help Text

MyTextEncrypted Field Help

i

Required

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

Mask Type

Mask All Characters

Mask Character

\*

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

MyURL

i

Field Name

MyURL

i

Description

MyURL Field Description

Help Text

MyURL Field Help

i

Required

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

Default 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

New

Page Layout Assignment

Account Record Type Help ?

No record types defined

## For Custom Objects

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

Record Types

New

Page Layout Assignment

Record Types Help ?

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

Account

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

= Required Information

Existing Record Type

--Master--

Record Type Label

RecordType1

Record Type Name

RecordType1

i

Description

Description of RecordType1

Active

☒

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 

Account (Support) Layout ▾

☐ Apply a different layout for each profile

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

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
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">RecordType1</a>	Description of RecordType1	<input checked="" type="checkbox"/>	<a href="#">Ivor Goreta</a> , 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

NewPage Layout Assignment

Account Record Type Help ?

Action	Record Type Label	Description	Active	Modified By
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">RecordType1</a>	Description of RecordType1	<input checked="" type="checkbox"/>	<a href="#">Ivor Goreta</a> , 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	<a href="#">Ivor Goreta</a> , 09/07/2013 22:19	Modified By	<a href="#">Ivor Goreta</a> , 09/07/2013 22:19

Picklists Available for Editing

Picklists Available for Editing Help ?

Action	Field	Modified Date
<a href="#">Edit</a>	Account Source	09/07/2013 22:19
<a href="#">Edit</a>	Active	09/07/2013 22:19
<a href="#">Edit</a>	Customer Priority	09/07/2013 22:19
<a href="#">Edit</a>	Industry	09/07/2013 22:19
<a href="#">Edit</a>	Ownership	09/07/2013 22:19
<a href="#">Edit</a>	Products	09/07/2013 22:19
<a href="#">Edit</a>	Rating	09/07/2013 22:19
<a href="#">Edit</a>	Sector	09/07/2013 22:19
<a href="#">Edit</a>	SLA	09/07/2013 22:19
<a href="#">Edit</a>	Type	09/07/2013 22:19
<a href="#">Edit</a>	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

Add  
▶  
Remove  
◀

Book on Mathematics  
Book on Chemistry  
Cure for common flue  
Sky scraper  
Cottage  
Bridge

Default

Cottage ▼

Save

Cancel

## 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:

**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 Information** | = Required Information

Account Owner	Ivor Goreta	Active	--None--
Account Name	<input type="text" value="Test Record Type 1"/>	Customer Priority	--None--
Parent Account	<input type="text"/>	SLA	--None--
Account Number	<input type="text"/>	SLA Expiration Date	<input type="text" value="[ 09/07/2013 ]"/>
Account Site	<input type="text"/>	SLA Serial Number	<input type="text"/>
Phone	<input type="text"/>	Rating	--None--
Fax	<input type="text"/>	Upsell Opportunity	--None--
Website	<input type="text"/>	Number of Locations	<input type="text"/>
Sector	<input type="text" value="Health"/>	Type	--None--
Products	<input type="text" value="--None--"/>		
MyCase	<input type="text" value="--None--"/>		
	<input type="text" value="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
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">RecordType1</a>	Description of RecordType1	✓	<a href="#">Ivor Goreta</a> , 09/07/2013 22:35
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">RecordType2</a>		✓	<a href="#">Ivor Goreta</a> , 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
<a href="#">Contract Manager</a>	<a href="#">Account Layout</a>	<a href="#">Account (Support) Layout</a>	<a href="#">Account (Marketing) Layout</a>
<a href="#">Custom: Marketing Profile</a>	<a href="#">Account (Marketing) Layout</a>	<a href="#">Account (Support) Layout</a>	<a href="#">Account (Marketing) Layout</a>
<a href="#">Custom: Sales Profile</a>	<a href="#">Account (Sales) Layout</a>	<a href="#">Account (Support) Layout</a>	<a href="#">Account (Marketing) Layout</a>
<a href="#">Custom: Support Profile</a>	<a href="#">Account (Support) Layout</a>	<a href="#">Account (Support) Layout</a>	<a href="#">Account (Marketing) Layout</a>
<a href="#">Customer Portal Manager Custom</a>	<a href="#">Account Layout</a>	<a href="#">Account (Support) Layout</a>	<a href="#">Account (Marketing) Layout</a>
<a href="#">Customer Portal Manager Standard</a>	<a href="#">Account Layout</a>	<a href="#">Account (Support) Layout</a>	<a href="#">Account (Marketing) Layout</a>
<a href="#">Gold Partner User</a>	<a href="#">Account Layout</a>	<a href="#">Account (Support) Layout</a>	<a href="#">Account (Marketing) Layout</a>
<a href="#">High Volume Customer Portal</a>	<a href="#">Account Layout</a>	<a href="#">Account (Support) Layout</a>	<a href="#">Account (Marketing) Layout</a>
<a href="#">Marketing User</a>	<a href="#">Account Layout</a>	<a href="#">Account (Support) Layout</a>	<a href="#">Account (Marketing) Layout</a>
<a href="#">Read Only</a>	<a href="#">Account Layout</a>	<a href="#">Account (Support) Layout</a>	<a href="#">Account (Marketing) Layout</a>
<a href="#">Silver Partner User</a>	<a href="#">Account Layout</a>	<a href="#">Account (Support) Layout</a>	<a href="#">Account (Marketing) Layout</a>
<a href="#">Solution Manager</a>	<a href="#">Account Layout</a>	<a href="#">Account (Support) Layout</a>	<a href="#">Account (Marketing) Layout</a>
<a href="#">Standard Platform User</a>	<a href="#">Account Layout</a>	<a href="#">Account (Support) Layout</a>	<a href="#">Account (Marketing) Layout</a>
<a href="#">Standard User</a>	<a href="#">Account Layout</a>	<a href="#">Account (Support) Layout</a>	<a href="#">Account (Marketing) Layout</a>
<a href="#">System Administrator</a>	<a href="#">Account Layout</a>	<a href="#">Account (Support) Layout</a>	<a href="#">Account (Marketing) Layout</a>
<a href="#">System Administrator Test</a>	<a href="#">Account Layout</a>	<a href="#">Account (Support) Layout</a>	<a href="#">Account (Marketing) Layout</a>

[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.

Save

Cancel

Page Layout To Use: -- Select Page Layout -- 10 Selected 0 Changed

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 (Support) 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.

Save

Cancel

Page Layout To Use: Account (Marketing) Layout 10 Selected 10 Changed

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 (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