



## Getting Started with Salesforce CRM

### Getting Started with SALESFORCE Part V

#### Description:

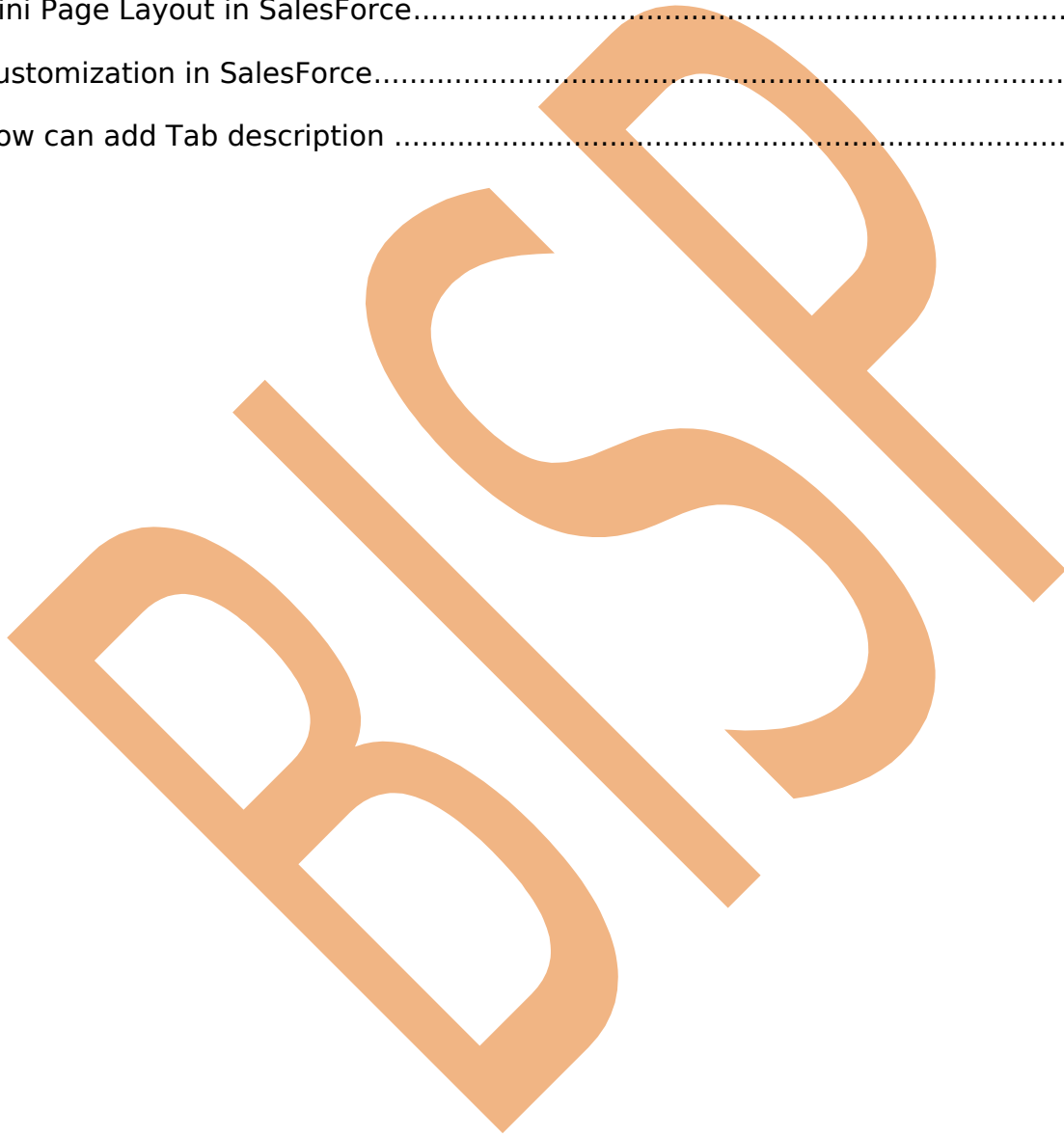
BISP is committed to provide BEST learning material to the beginners and advance learners. In the same series, we have prepared a complete end-to end Hands-on Beginner's Guide for Salesforce. The document focuses on relationship, formula field and customization. **Join our professional training program and learn from experts.**

#### History:

Version	Description Change	Author	Publish Date
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# Relationship in Salesforce

Use relationship to associate one object to another object in salesFroce.com. The relationship just called parent our child relation, create relation parent our child relation.

The object which on you create a relation is called the child, you can only create a relation field on the child object.

In Salesforce you have two option

- 1.) **Lookup Relationship**
- 2.) **Master Detail Relationship**

**1.) Lookup Relationship :-** Lookup field is non mandatory field by default, deleting the parent record will not affect the child records, in lookup Relationship we have create 25 child.

**2.) Master Detail Relationship :-** Master detail field is mandatory field by default, deleting the parent record will also delete all the associated records, master detail relationship we have create 2 parent.

Click to **setup** -> **create** -> click on field after that you find the **Custom Fields & Relationships** in **Custom Fields & Relationships** click on **new** button. and select the **Lookup Relationship** Radio button. check this ration button and click to **Next** button. you can see below.

## Step 1 :-

Employee  
New Custom Field

[Help for this Page](#)

Step 1. Choose the field type Step 1

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

**Data Type**

None Selected Select one of the data types below.

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

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

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

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

After Click **Next** button

## Step 2 :-

There is one dropdown menu name is **Related List** in this dropdown select any value which want to you and click to **Next** button. you can see below .

Employee Help for this Page ?


### New Relationship

**Step 2. Choose the related object** Step 2

Select the other object to which this object is related.

<b>Related To</b>	<div style="border: 1px solid #ccc; padding: 2px;"><div style="border-bottom: 1px solid #ccc; padding: 2px;">--None--</div><ul style="list-style-type: none"><li>--None--</li><li>Account</li><li>Asset</li><li>Book</li><li>Business Hours</li><li>Campaign</li><li>Candidate</li><li>Case</li><li style="background-color: #e0e0e0;">Contact</li><li>Contract</li><li>Department</li><li>Employee</li><li>Idea</li><li>Job Application</li><li>Lead</li><li>Opportunity</li><li>Postion</li><li>Product</li><li>Social Persona</li><li>Solution</li></ul></div>
-------------------	---

Select any value and click



## Step 3 :-

Fill the Field Name and click to Next button.

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.

Lookup Filter

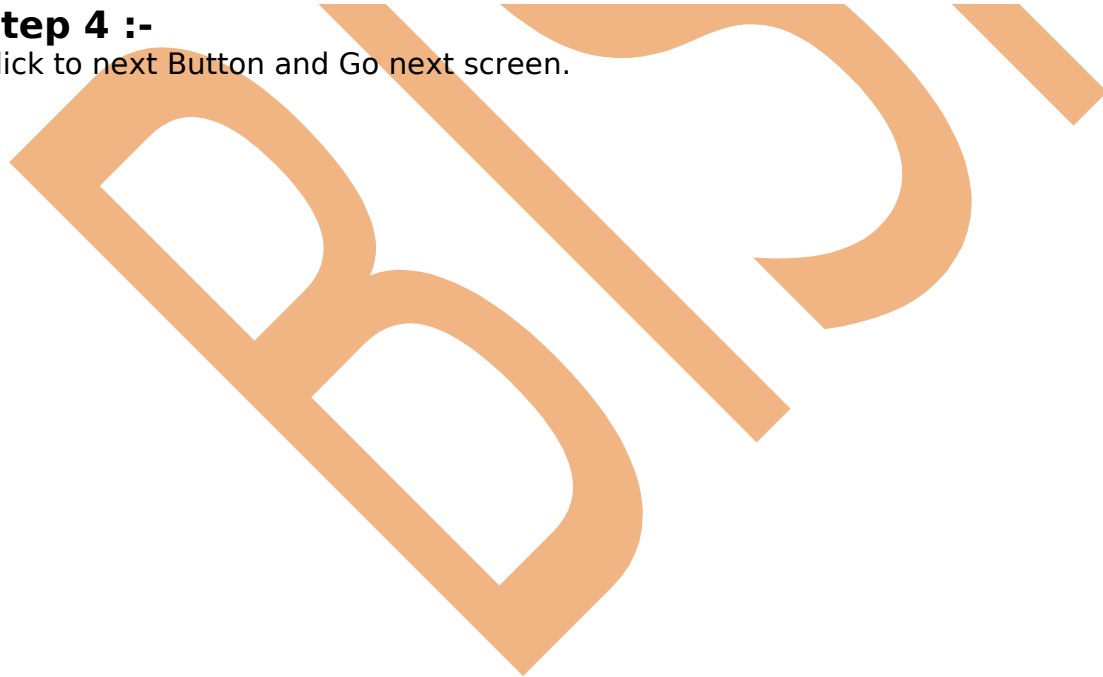
Optionally, create a filter to limit the records available to users in the lookup field. [Tell me more!](#)

[Show Filter Settings](#)

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

## Step 4 :-

Click to next Button and Go next screen.



## New Relationship

**Step 4. Establish field-level security for reference field** Step 4 of 6

Previous **Next** Cancel

Field Label Candidate  
Data Type Lookup  
Field Name Candidate  
Description

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
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"/>
Force.com - App Subscription User	<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"/>
Marketing User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Partner App Subscription	<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"/>

**Step 5 :-**

## New Relationship

**Step 5. Add reference field to Page Layouts** Step 5 of 6

Previous Next Cancel

Field Label Candidate  
Data Type Lookup  
Field Name Candidate  
Description

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

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

Add Field **Page Layout Name**

Employee Layout

Previous **Next** Cancel

Click to Next button.

**Step 6 :-**

Click to **Save** button.

**Step 6. Add custom related lists** Step 6 of 6

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

Field Label	Candidate
Data Type	Lookup
Field Name	Candidate
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"/>	Candidate Layout

Append related list to users' existing personal customizations

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

After that you can click on employee tab and check the change on employee tab.

**Employee Edit** Emp-002 [Help for this Page](#)

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

**Information**

Employee Number	Emp-002
First Name	<input type="text" value="abbc"/>
Mobile Number	<input type="text" value="1234567890"/>
Email Id	<input type="text" value="a@a.com"/>
Candidate	<input type="text" value=""/>
Position	<input type="text" value=""/>

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

**Search** ~ salesforce.com - Developer Edition - Mozilla Firefox

https://ap1.salesforce.com/\_ui/common/data/LookupPage?ikfm=editPage&lk

**Lookup**

Search  [Go!](#)

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

**Search Results**

Candidate Number	First Name	Mobile Number	Email Id
Y-001	chandra prakash	(658) 545-6875	bpl@bpl.com
Y-002	suresh	65	a@a.com

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After Save you can see that page .

**Employee** Emp-002 [Customize Page](#) | [Edit Layout](#) | [Printable View](#) | [Help for this Page](#)

[Back to List: Custom Object Definitions](#) [Open Activities \(0\)](#) | [Activity History \(0\)](#)

**Employee Detail** [Edit](#) [Delete](#) [Clone](#)

Employee Number	Emp-002	Owner	<a href="#">vqesh sharma</a> <a href="#">[Change]</a>
First Name	abbc		
Mobile Number	1234567890		
Email Id	<a href="#">a@a.com</a>		
Candidate	<a href="#">Y-001</a>		
Position	<a href="#">Java</a>		
Created By	<a href="#">vqesh s</a>	Last Modified By	<a href="#">vqesh sharma</a> , 9/17/2013 1:55 PM

**Candidate** [View](#) [Edit](#)

First Name	chandra prakash
Email Id	<a href="#">bpl@bpl.com</a>
Mobile Number	(658) 545-6875

**Open Activities** [Open Activities Help](#)

No records to display

If you want see position is dependent or not for example delete the any position name after that you can see the changes.

## And before deleting SF Developer you can see

Employee  
Emp-005

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

[Customize Page](#) | [Edit Layout](#) | [Printable View](#) | [Help for this Page](#)

[Open Activities \(0\)](#) | [Activity History \(0\)](#)

### Employee Detail

[Edit](#) [Delete](#) [Clone](#)

Employee Number	Emp-005	Owner	<a href="#">yogesh sharma [Change]</a>
First Name	abbc		
Mobile Number	1234567890		
Email Id	<a href="#">a1@a.com</a>		
Candidate	Y-002		
Position	SF developer		
Created By	<a href="#">yogesh sharma, 9/18/2013 9:37 AM</a>	Last Modified By	<a href="#">yogesh sharma, 9/18/2013 9:37 AM</a>

[Edit](#) [Delete](#) [Clone](#)

Click on Positions Tab and click after that click any field name and delete this field  
**Ex :-** Positions -> SF Developer -> Delete  
you can see below screen.

Position  
SF developer

[Customize Page](#) | [Edit Layout](#) | [Printable View](#) | [Help for this Page](#)

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

[Open Activities \(0\)](#) | [Activity History \(0\)](#) | [Position History \(1\)](#) | [Notes & Attachments \(0\)](#) | [Job Applications \(0\)](#) | [Employees \(1\)](#)

### Position Detail

[Edit](#) [Delete](#) [Clone](#)

Position Name	SF developer	Owner	<a href="#">yogesh sharma [Change]</a>
Min Pay	Rs.25,000.00		
Open date	9/18/2013		
Created By	<a href="#">yogesh sharma, 9/18/2013 9:35 AM</a>	Last Modified By	<a href="#">yogesh sharma, 9/18/2013 9:35 AM</a>

[Edit](#) [Delete](#) [Clone](#)

After delete Position name you can see that field is empty because these field depend on position field.

Employee  
Emp-005

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

[Customize Page](#) | [Edit Layout](#) | [Printable View](#) | [Help for this Page](#)

[Open Activities \(0\)](#) | [Activity History \(0\)](#)

### Employee Detail

[Edit](#) [Delete](#) [Clone](#)

Employee Number	Emp-005	Owner	<a href="#">yogesh sharma [Change]</a>
First Name	abbc		
Mobile Number	1234567890		
Email Id	<a href="#">a1@a.com</a>		
Candidate	Y-002		
Position			
Created By	<a href="#">yogesh sharma, 9/18/2013 9:37 AM</a>	Last Modified By	<a href="#">yogesh sharma, 9/18/2013 10:04 AM</a>

[Edit](#) [Delete](#) [Clone](#)

Depending



# Formula Field in Salesforce

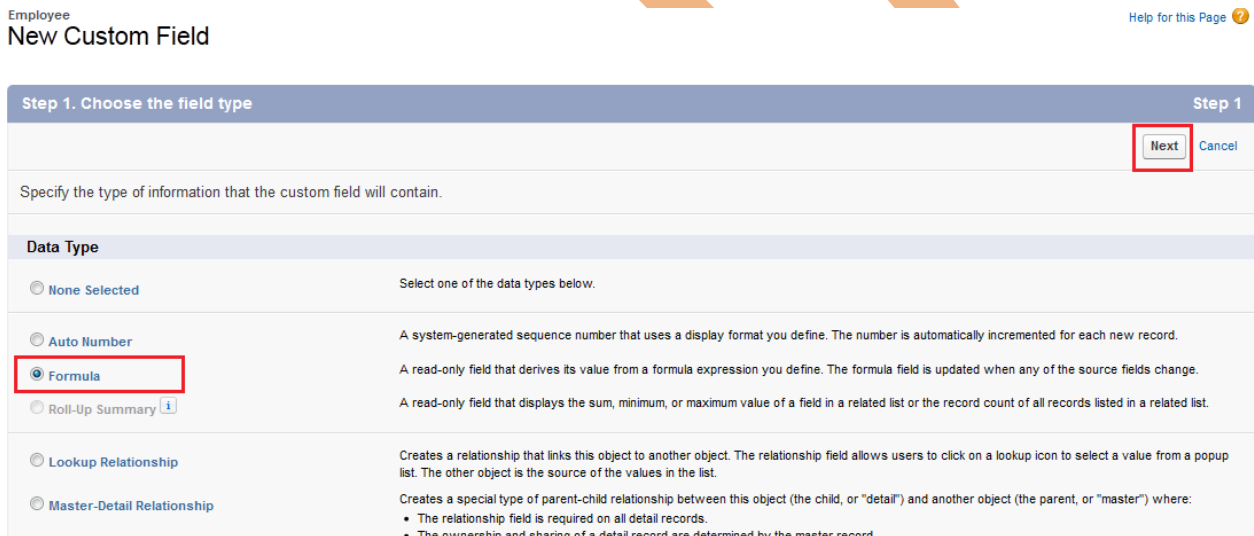
Formula Field called Cross object formula field. And they are work only in relationship. it can make use of various data and operations to perform the calculation

## How To Add Formula Field :

Click to **Setup -> Objects -> select your custom object(Ex :- Employees)** and find **Custom Fields & Relationships** click on **New** Button. and check the field **Formula** you can see below.

### Step 1:-

Select Formula and click **Next** button .



Employee  
New Custom Field Help for this Page ?

Step 1. Choose the field type Step 1

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

**Data Type**

None Selected Select one of the data types below.

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

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

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

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

Master-Detail Relationship Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.

### Step 2 :-

Give the **First Label** name and select **Formula Return Type** and click to **Next** button.

Step 2. Choose output type Step 2 of 5

Previous **Next** Cancel

Field Label  Field Name

**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`

### Step 3 :-

In this step click on **Insert Field** button after that open popup window you may be select your field click to **Insert** button .

Step 3. Enter formula Step 3 of 5

Enter your formula and click Check Syntax

Example: `Full Name = LastName & ", " & FirstName`

Simple Formula  Advanced Formula

**Insert Field** Employee Name (Text) =

**Insert Field** x

Select a field, then click Insert. Labels followed by a ">" indicate that there are more fields available.

Employee >	Candidate	Candidate Number	You have selected: <b>Candidate__r.First_Name__c</b> Type: Text API Name: Candidate__r.First_Name__c <b>Insert</b>
\$Api >	Candidate >	Created By >	
\$Label >	Created By >	Created By ID	
\$Organization >	Created By ID	Created Date	
\$Profile >	Created Date	Email Id	
\$System >	Email Id	First Name	
\$User >	Employee Number	Last Activity Date	
\$UserRole >	First Name	Last Modified By >	
	Last Activity Date	Last Modified By ID	

Close

After that you can see that Formula is add in text field. see below.  
There you can see Formula will add on text field click to **Next** button .

**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: Full Name = LastName & ", " & FirstName [More Examples ...](#)

Simple Formula **Advanced Formula**

Insert Field Insert Operator ▾

Employee Name (Text) =  
Candidate\_r.First\_Name\_c

Functions

-- All Function Categories -- ▾

ABS

AND

BEGINS

BLANKVALUE

BR

CASE

Insert Selected Function

**Quick Tips**

- [Getting Started](#)
- [Operators & Functions](#)

## Step 4 :-

After that click to **Next** button .

Previous **Next** Cancel

Field Label	Employee Name
Data Type	Formula
Field Name	Employee_Name
Description	

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 type="checkbox"/> Visible	Read-Only
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"/>
Force.com - App Subscription User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Force.com - Free User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Gold Partner User	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Marketing User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Partner App Subscription	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Read Only	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Silver Partner User	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Solution Manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

## Step 5 :-

if you want to add more formula field click to **Save & New** button else click on **Save** button.

Step 5. Add to page layouts Step 5 of 5

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

Field Label	Employee Name
Data Type	Formula
Field Name	Employee_Name
Description	

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"/>	Employee Layout

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

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

After That you can check it Click to Custom objects(Ex :- Employee) and you can any employee list and see the changes.

Employee  
Emp-005

[Back to List: Custom Object Definitions](#) [Customize Page](#) | [Edit Layout](#) | [Printable View](#) | [Help for this Page](#)

[Open Activities \(0\)](#) | [Activity History \(0\)](#)

**Employee Detail** [Edit](#) [Delete](#) [Clone](#)

Employee Number	Emp-005	Owner	<a href="#">yogesh sharma</a> <a href="#">[Change]</a>
First Name	abbc		
Mobile Number	1234567890		
Email Id	<a href="mailto:a1@a.com">a1@a.com</a>		
Candidate	<a href="#">Y-002</a>		
Postion	<a href="#">Sr SW</a>		
Employee Name	suresh		
Min Pay Of This Position	Rs.35,000.00		
Created By	<a href="#">yogesh sharma</a> , 9/18/2013 9:37 AM	Last Modified By	<a href="#">yogesh sharma</a> , 9/18/2013 10:10 AM

[Edit](#) [Delete](#) [Clone](#)

These are formula field and it will not editable

When you add new record you can find there is no formula field show .it will show only view time.

**Employee Edit** Save Save & New Cancel

**Information** Required Information

Owner: yogesh sharma

First Name

Mobile Number

Email Id

Candidate

Position

**There is no formula**

Save Save & New Cancel

## Mini Page Layout in Salesforce

You can define mini page layout for the records that appear in the mini view in Salesforce.

This allows users to access information across multiple object and multiple records types on one screen without the use of custom formulas, VisualForce pages, or any other code.

Mini Page Layout only show mandatory fields.

You can all so add new field on candidate list .

### how can open mini page layout list in Salesforce :-

Click on the Custom object (Ex :- **Positions**) and after that click on any **position name**

Home **Positions** Job Applications Departments Employees wiki +

Create New... Help for this Page

Positions Home View: All Got Edit Create New View

**Recent Positions** New Recently Viewed

Position Name	Open date	Owner Alias	Owner First Name	Owner Last Name	Created By Alias	Created By
Java developer	9/3/2013	yshar	yogesh	sharma	yshar	yogesh sharma, 9/2/2013 2:25 PM
<b>Sr. SW</b>	9/18/2013	yshar	yogesh	sharma	yshar	yogesh sharma, 9/18/2013 9:36 AM
sdic developer	9/4/2013	yshar	yogesh	sharma	yshar	yogesh sharma, 9/2/2013 2:25 PM

After that click on **Edit Layout**

Position  
Sr. SW

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

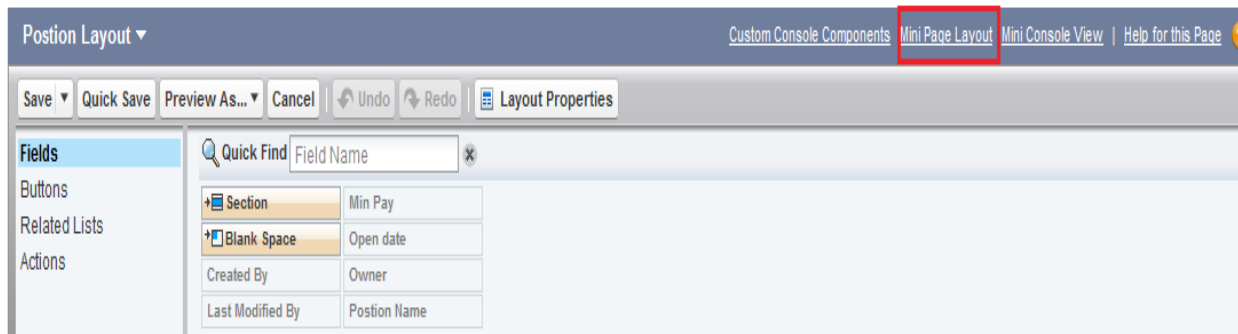
« Back to List: Custom Object Definitions

[Open Activities \(0\)](#) | [Activity History \(0\)](#) | [Position History \(1\)](#) | [Notes & Attachments \(0\)](#) | [Job Applications \(1\)](#) | [Employees \(1\)](#)

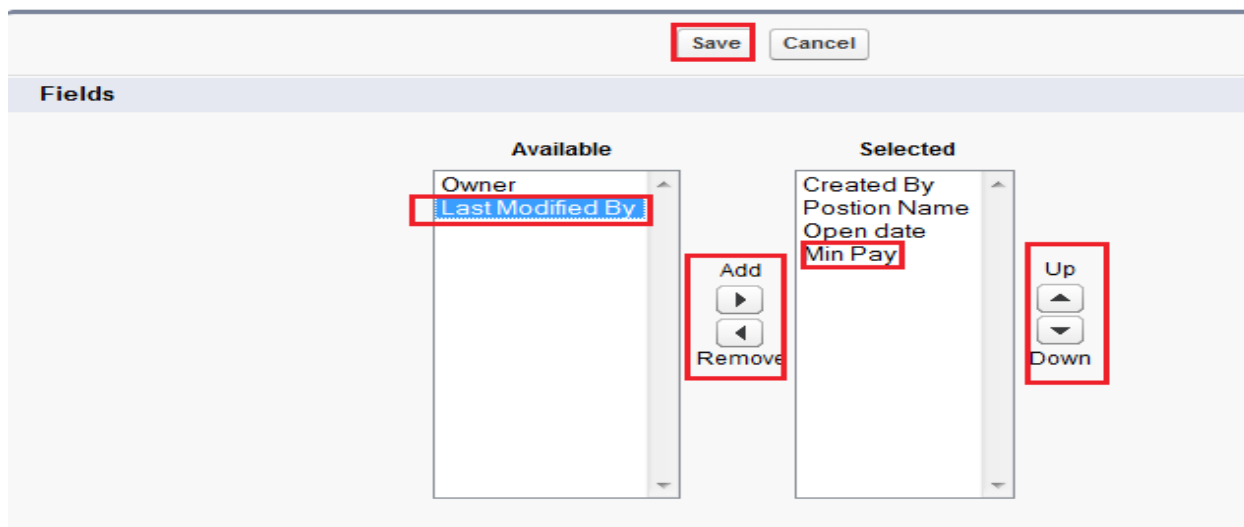
Position Detail

Edit Delete Clone

After That Click on **Mini Page Layout**



After that you can show below screen on this screen you can add the available item and click to **Save** button.



After **Save** you can check the employee list.

## Employee Detail

Edit Delete Clone

Employee Number	Emp-003	Owner	yogesh sharma [Change]
First Name	Nitin		
Mobile Number	1234567890		
Email Id	abc@gmail.com		
Candidate	Y-001		
Postion	sdfc developer		
Employee Name	chandra p...		
Min Pay Of This Position	Rs.30,000.00		
Created By	yogesh sharma	Last Modified By	yogesh sharma, 9/17/2013 4:07

**Position** View Edit

Created By yogesh sharma, 9/2/2013 2:25 PM

Position Name sdfc developer

Open date 9/4/2013

Min Pay Rs.30,000.00

Last Modified By yogesh sharma, 9/18/2013 9:41 AM

**Open Activities**

No records to display

This is mini page

## Customization in Salesforce

If you need to adapt Salesforce functionality to your company's existing processes and workflows so as to make them more efficient and effective, we will help you customize your Salesforce experience. We can customize and personalize your existing Salesforce.com CRM solution according to your business needs.

For Ex :- if you want to add new employee record there is many post and employee code available how to find the particular Job and employee code etc. see below on screen.

Position Name	Record ID	Min Pay	Created Date
Sr_SW	a069000000NYhE9	Rs. 35,000.00	9/18/2013
Java developer	a069000000NXpDb	Rs. 5,000.00	9/2/2013
sdfc developer	a069000000NXoDo	Rs. 30,000.00	9/2/2013

you can see upper screen there is many job available if you have many office in country and have you requirement of in pune, java developer in this list find to you on job bases very difficult so you can add some more information about position like a city name, sub location etc.

### How to Create :

Click on **Setup** -> **Objects** -> **Select any object (Ex :- Employees)** -> there is find you

**Search Layout** in this section you can find **Lookup dialog**.

you can see below .

Action	Layout	Columns Displayed	Buttons Displayed	Modified By
<a href="#">Edit</a>	Search Results	Employee Number		voqesh.sharma, 9/14/2013 10:08 AM
<a href="#">Edit</a>	Lookup Dialogs	Employee Number	N/A	voqesh.sharma, 9/14/2013 10:08 AM
<a href="#">Edit</a>	Lookup Phone Dialogs	Employee Number, Mobile Number	N/A	voqesh.sharma, 9/14/2013 10:08 AM
<a href="#">Edit</a>	Employees Tab	Employee Number	N/A	voqesh.sharma, 9/14/2013 10:08 AM
<a href="#">Edit</a>	Employees List View	N/A	New,Accept,Change Owner	voqesh.sharma, 9/14/2013 10:08 AM
<a href="#">Edit</a>	Search Filter Fields		N/A	voqesh.sharma, 9/14/2013 10:08 AM

After that you can click on **Edit** button and add item you can show below screen.

Edit Search Layout Help for this Page

### Employee Lookup Dialogs

Select the fields to include in this search layout. Note that your choices only determine the display of search results and do not affect the fields that are actually searched. Please refer to the online help for [more information on search fields](#).

Available Fields	Selected Fields
<ul style="list-style-type: none"> <li>Candidate</li> <li>Employee Name</li> <li>First Name</li> <li>Min Pay Of This Position</li> <li>Owner Alias</li> <li>Owner First Name</li> <li>Owner Last Name</li> <li>Created By Alias</li> <li>Created By</li> <li>Last Modified By Alias</li> <li>Last Modified By</li> </ul>	<ul style="list-style-type: none"> <li>Employee Number</li> <li>Mobile Number</li> <li>Email Id</li> <li>Position</li> <li>Created Date</li> </ul>

Save Cancel

After that click to save button and see below. You can see that changes

Employee Edit Save

### New Employee

**Employee Edit** Save

**Information**

First Name

Mobile Number

Email Id

Candidate

Position

Save Save

Search ~ salesforce.com - Developer Edition - Mozilla Firefox

https://api.salesforce.com/\_ui/common/data/LookupPage?lkfm=editPage&lknm=CF00N90000007ESpc&lktp=a07t

### Lookup

Search

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

**Search Results**

Candidate Number	First Name	Mobile Number	Email Id
Y-001	chandra prakash	(658) 545-6875	bpl@bpl.com
Y-002	suresh	65	a@a.com

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When click on any custom objects Tab (Ex: - Employees ) there is show list not fully describe you can show below screen.

Recent Employees New Recently Viewed

Employee Number
Emp-003
Emp-005
Emp-006
Emp-002

There is no More Tab



# How can add Tab description

Click to **setup** -> **objects** -> select on **custom objects** name(Ex :- Employees) click on this Tab and find the **Search Layouts** panel in this panel **Employee Tab** is show click to **Edit** button.

Custom Object  
Employee

Standard Fields [4] | Custom Fields & Relationships [7] | Validation Rules [0] | Page Layouts [1] | Field Sets (BETA) [0] | **Search Layouts [6]** | Buttons, Links, and Actions [8] | Record Types [0]

Search Layouts

Action	Layout	Columns Displayed	Buttons Displayed	Modified By
Edit	Search Results	Employee Number		yoqesh sharma, 9/14/2013 10:08 AM
Edit	Lookup Dialogs	Employee Number, Mobile Number, Email Id, Postion, Created Date	N/A	yoqesh sharma, 9/18/2013 2:14 PM
Edit	Lookup Phone Dialogs	Employee Number, Mobile Number	N/A	yoqesh sharma, 9/14/2013 10:08 AM
<b>Edit</b>	<b>Employees Tab</b>	Employee Number	N/A	yoqesh sharma, 9/14/2013 10:08 AM
Edit	Employees List View	N/A	New,Accept,Change Owner	yoqesh sharma, 9/14/2013 10:08 AM
Edit	Search Filter Fields		N/A	yoqesh sharma, 9/14/2013 10:08 AM

After that add available field click to **Add** button and save the data you can check it click on employee Tab, see below.

Edit Search Layout  
Employees Tab

Select the fields to include in this search layout. Note that your choices only determine the display of search results and do not affect the fields that are actually searched. Please refer to the online help for [more information on search fields](#).

Available Fields	Selected Fields
Candidate	Employee Number
First Name	Employee Name
Min Pay Of This Position	Mobile Number
Postion	Email Id
Owner Alias	Created Date
Owner First Name	
<b>Owner Last Name</b>	
Created By Alias	
Created By	
Last Modified By Alias	
Last Modified By	

Save Cancel

after save the data you can see it in employee record available with details.

Recent Employees

New Recently Viewed

Employee Number	Employee Name	Mobile Number	Email Id	Created Date
Emp-003	chandra prakash	1234567890	abc@gmail.com	9/16/2013
Emp-005	suresh	1234567890	a1@a.com	9/18/2013
Emp-006	suresh	54178451254	b@v.com	9/18/2013
Emp-002	chandra prakash	1234567890	a@a.com	9/14/2013