

Salesforce Object Manager Explained: Fields, Page Layouts, and Relationships

CHEATSHEET

The ultimate administrative cheat sheet for structuring fields, customizing layouts, and controlling Salesforce schemas.

A user complains they can't see a Salesforce field that definitely exists. Before you touch Profiles or permission sets, fix it at the blueprint level in Object Manager.

1 The Object Manager Map

Every standard and custom Salesforce object relies on this central workspace. Here is what each critical section controls:

- ✦ Fields & Relationships: Defines data containers, data types, and field-level security.
- ✦ Page Layouts: Structures where fields appear on record pages and sets editability.
- ✦ Compact Layouts: Controls fields shown in mobile cards and the top highlights panel.
- ✦ Validation Rules: Enforces strict data quality constraints during record save operations.
- ✦ Record Types: Configures different layouts and picklist values per business process.

2 Managing Fields Safely

Fields are the actual data containers on a record. Choosing incorrect parameters during field creation ruins reporting and limits database scalability.

- ✦ Always check for standard fields (e.g., Account Name) before building duplicates.
- ✦ Choose precise data types (Currency, Date, Picklist) to guarantee clean, filterable data.
- ✦ Set Field-Level Security (FLS) to restrict visibility at the database layer, not just layouts.
- ✦ Use custom Help Text to guide end-users and reduce validation rule frustration.

3 Page Layouts vs. Compact Layouts

Don't confuse layout systems. Salesforce displays field data differently depending on the device, page area, and active workspace.

- ✦ Page Layouts govern the central record detail tab, section headers, and related lists.
- ✦ Compact Layouts power the record header banner and the visual interface on mobile screens.
- ✦ Page Layouts can make fields read-only or required specifically for chosen UI profiles.
- ✦ Keep layouts light: hide unused fields to optimize load times and UI scroll height.