

## CHEATSHEET

*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.*

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

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

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.

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.

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.

THAT'S A WRAP

# Build Clean Salesforce Orgs

Stop troubleshooting layout symptoms. Master the underlying object configurations that drive user success. Read the full step-by-step tutorial on SalesforceLWC.

- ✦ Read the guide: [salesforcelwc.com](https://salesforcelwc.com)
- ✦ Master object relationships, fields, and layouts
- ✦ Configure Salesforce with admin best practices

→ [salesforcelwc.com](https://salesforcelwc.com)

5 slides

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