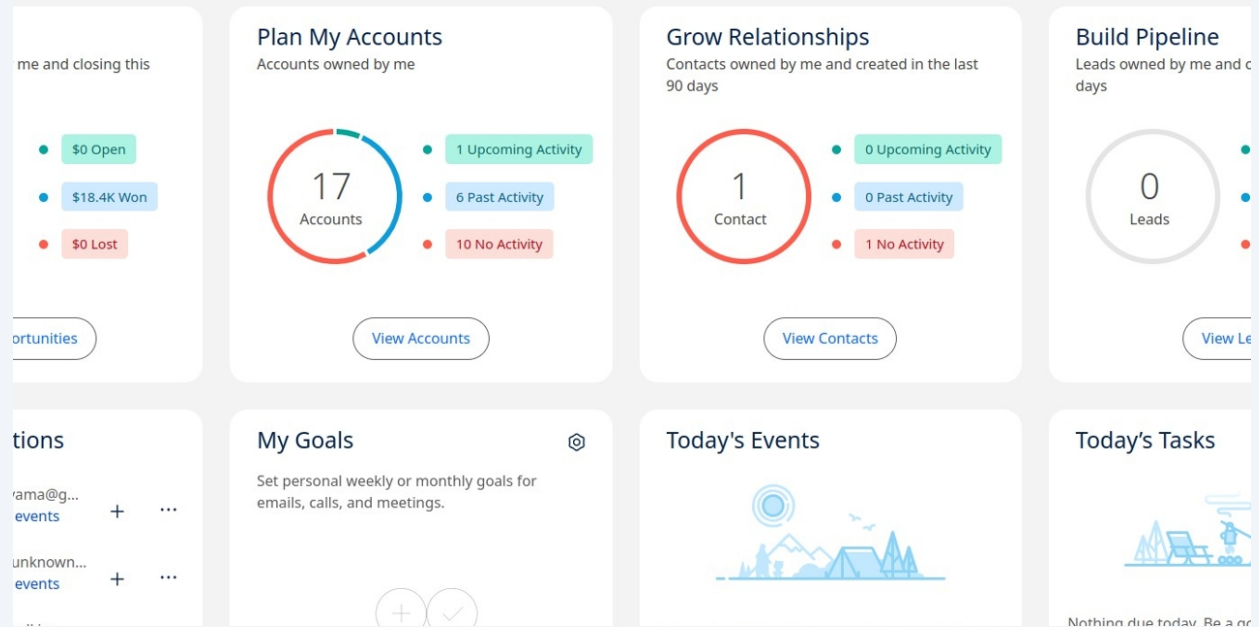


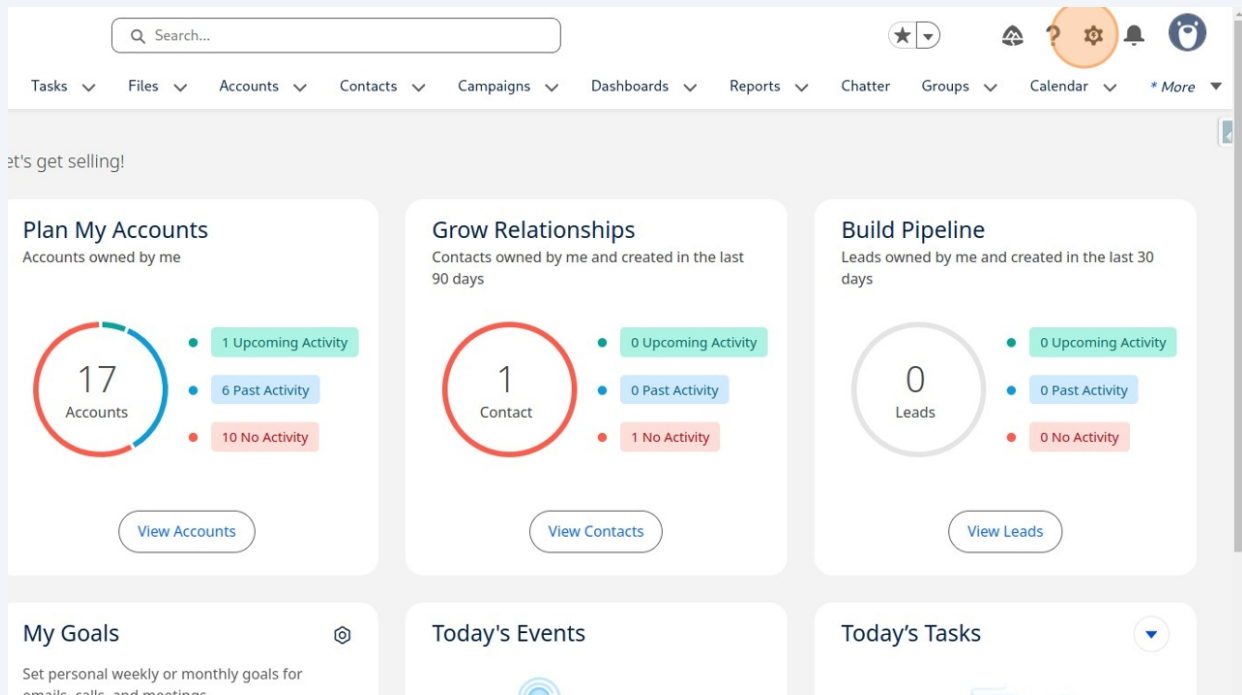
Enable Link Customer By Name - QIME

1 Navigate to Salesforce Home Page

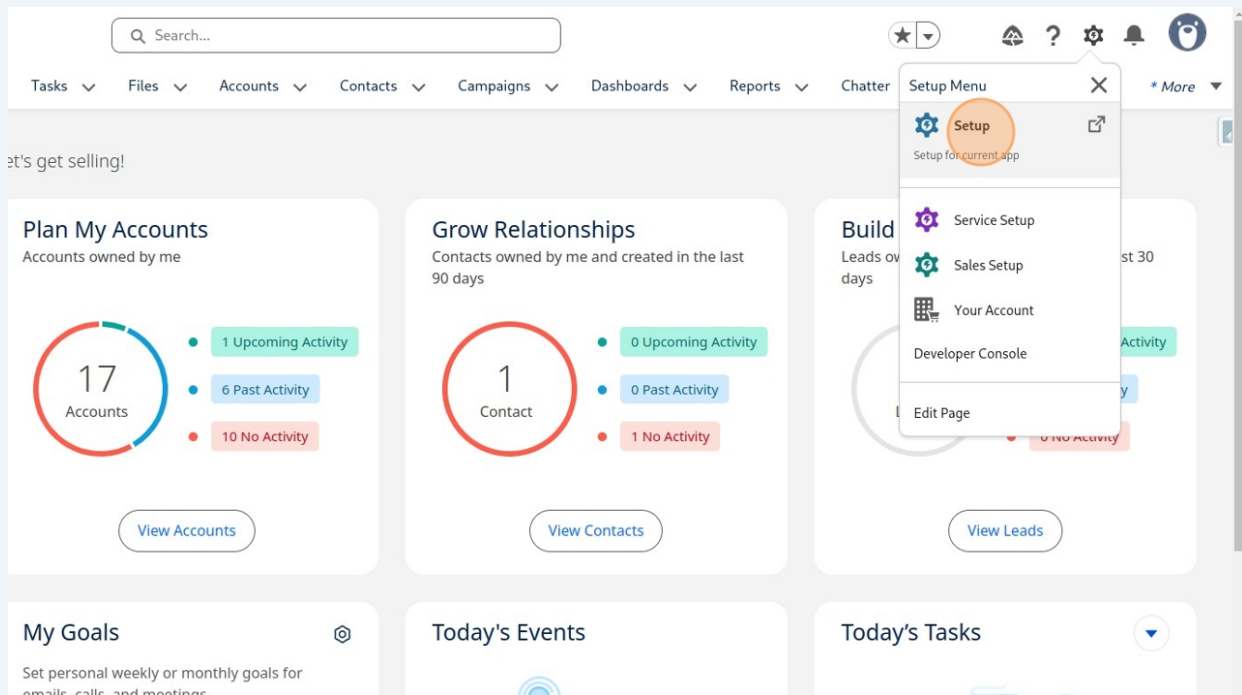
Good morning, Justin. Let's get selling!



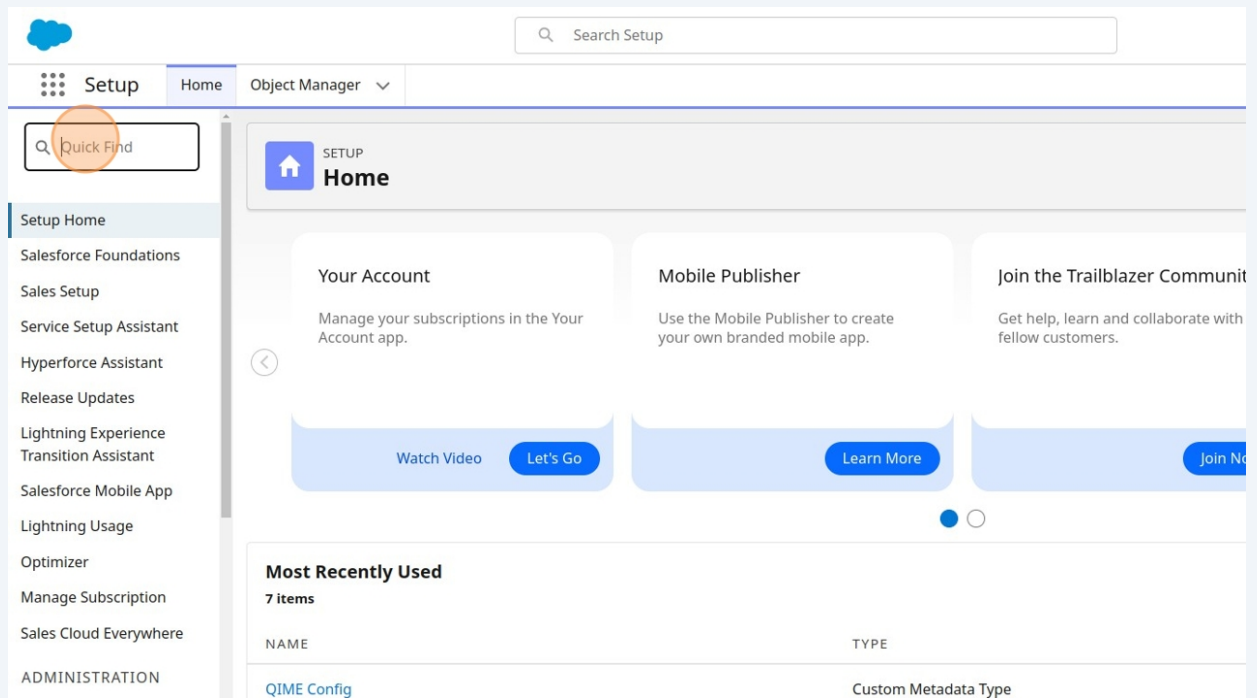
2 Click on the Cog



3 Open Setup



4 Click the "Quick Find" field.



5 Type "custom metadata" in the search box.

6 Click "Custom Metadata Types"

Search Setup

Setup Home Object Manager

custom met

Custom Code

Custom Metadata Types

Didn't find what you're looking for? Try using Global Search.

SETUP Home

Your Account

Manage your subscriptions in the Your Account app.

Watch Video Let's Go

Mobile Publisher

Use the Mobile Publisher to create your own branded mobile app.

Learn More

Join the Trailblazer Community

Get help, learn and collaborate with fellow customers.

Join Now

Most Recently Used

7 items

NAME	TYPE
QIME Config	Custom Metadata Type

7 Click "Manage Records" on the "QIME Config" metadata type.

Custom Code

Custom Metadata Types

Didn't find what you're looking for? Try using Global Search.

All Custom Metadata Types

Custom metadata types enable you to create your own setup objects whose records are metadata rather than data. These are typically used to define an environment to another, or packaged and installed.

Rather than building apps from data records in custom objects or custom settings, you can create custom metadata types and add metadata records, deploy, and upgrade. Querying custom metadata records doesn't count against SOQL limits.

New Custom Metadata Type

Action	Label	Installed Package	Namespace Prefix	Visibility	API Name	Record Size
Manage Records	Lookup Rollup Summary	Declarative Lookup Rollup Summaries Tool	dlrs	Public	dlrs_LookupRollupSummary2__mdt	2489
Manage Records	QB Credential	QIME	qime	Public	qime_QB_Credential__mdt	2181
Manage Records	QIME Config	QIME	qime	Public	qime_QIME_Config__mdt	2006
Manage Records	QIME Parameter	QIME	qime	Public	qime_QIME_Parameter__mdt	651
Manage Records	System Property	SFDC Channel Order	CHANNEL_ORDERS	Public	CHANNEL_ORDERS_System_Property__mdt	396

8 Click "Default"

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with "custom met" and a list of items under "Custom Code", with "Custom Metadata Types" selected. The main content area is titled "Custom Metadata Types" and shows "QIME Configs". A table lists the configurations, with the "Default" link highlighted by an orange circle. The table has columns for Action, Label, QIME Config Name, and Namespace Prefix.

Action	Label	QIME Config Name	Namespace Prefix
Edit	Default	Default	qime

9 Click the "Edit" button.

The screenshot shows the "QIME Config (Managed)" detail page in Salesforce Setup. The page title is "QIME Config (Managed)". Below the title is a yellow warning banner: "This QIME Config is managed, meaning that you may only edit certain attributes. [Display More Information](#)". The "QIME Config Detail" section contains a table of configuration attributes. The "Edit" button is highlighted with an orange circle. The "Created By" field shows "Justin Wills, 12/11/2023, 2:39 AM".

Label	Default
QIME Config Name	Default
Link By Memo	<input type="checkbox"/>
QB Product Id	
Use Line Item	<input type="checkbox"/>
Create Invoice From Opp	<input checked="" type="checkbox"/>
Link Customer By Name	<input type="checkbox"/>
Invoice Stage Name	Closed Won
Create Customer w/ Invoice	<input type="checkbox"/>

10 Click the "Link Customer By Name" field.

Custom Metadata Types

Didn't find what you're looking for? Try using Global Search.

QIME Config (Managed)

This QIME Config is managed, meaning that you may only edit certain attributes. [Display More Information](#)

QIME Config Edit

Save Save & New Cancel

Information

Label Default Namespace Prefix qin

QIME Config Name Default ⓘ

Link By Memo ☐

QB Product Id

Use Line Item ☐

Create Invoice From Opp ☒

Link Customer By Name ☒

Invoice Stage Name Closed Won

Create Customer w/ Invoice ☐

Save Save & New Cancel

11 Save the record.

Custom Metadata Types

Didn't find what you're looking for? Try using Global Search.

QIME Config (Managed)

This QIME Config is managed, meaning that you may only edit certain attributes. [Display More Information](#)

QIME Config Edit

Save Save & New Cancel

Information

Label Default Namespace Prefix qime

QIME Config Name Default ⓘ

Link By Memo ☐

QB Product Id

Use Line Item ☐

Create Invoice From Opp ☒

Link Customer By Name ☒

Invoice Stage Name Closed Won

Create Customer w/ Invoice ☐

Save Save & New Cancel