

Add Field to Page Layout in QIME Configuration Steps

1 Navigate to "Custom Metadata Types" in Salesforce



SETUP

Custom Metadata Types

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 application configurations that need 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, with all the manageability that come 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	Description
Manage Records	Lookup Rollup Summary	Declarative Lookup Rollup Summaries Tool	dlsr	Public	dlsr__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	Used to configure key-value pair par control systemwide features
Manage Records	System Property	SFDC Channel Order	CHANNEL_ORDERS	Public	CHANNEL_ORDERS__System_Property__mdt	396	

2 Click "QIME Config"

Custom Code

Custom Metadata
Types

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

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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

3 Click "Edit" on the Page Layout

Custom Metadata
Types

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Custom Fields					
New					
Action	Field Label	API Name	Installed Package	Data Type	Field Manageability
Edit	Create Customer w/ Invoice	qime__Create_Customer_w_Invoice__c	QIME	Checkbox	Subscriber editable
Edit	Create Invoice From Opp	qime__Create_Invoice_From_Opp__c	QIME	Checkbox	Subscriber editable
Edit	Custom Field 1 Id	qime__Custom_Field_1_Id__c	QIME	Text(255)	Subscriber editable
Edit	Custom Field 2 Id	qime__Custom_Field_2_Id__c	QIME	Text(255)	Subscriber editable
Edit	Custom Field 3 Id	qime__Custom_Field_3_Id__c	QIME	Text(255)	Subscriber editable
Edit	Default Tax Id	qime__Default_Tax_Id__c	QIME	Text(255)	Subscriber editable
Edit	Invoice Stage Name	qime__Invoice_Stage_Name__c	QIME	Text(255)	Subscriber editable
Edit	Line Item Id (Deprecated)	qime__Line_Item_Id__c	QIME	Text(255)	Upgradable
Edit	Link By Memo	qime__Link_By_Memo__c	QIME	Checkbox	Subscriber editable
Edit	Link Customer By Name	qime__Link_Customer_By_Name__c	QIME	Checkbox	Subscriber editable
Edit	Link Invoice To Opp Using (Deprecated)	qime__Link_Invoice_To_Opp_Using_Memo__c	QIME	Checkbox	Upgradable
Edit	QB Product Id	qime__QB_Product_Id__c	QIME	Text(255)	Subscriber editable
Edit	Use Line Item	qime__Use_Line_Item__c	QIME	Checkbox	Subscriber editable
Edit	Use Single Line Item (Deprecated)	qime__Use_Single_Line_Item__c	QIME	Checkbox	Upgradable
Edit	Use Tax Id	qime__Use_Tax_Id__c	QIME	Checkbox	Subscriber editable
Deleted Fields (0)					
Validation Rules					
No validation rules defined.					
Page Layouts					
New Page Layout Assignment					
Action	Page Layout Name	Installed Package	Created By		
Edit	QIME Config Layout	QIME	Justin Wills, 12/11/2023, 2:39 AM		

4 Click and Drag "Link Customer By Name" to the page layout

Search Setup

Object Manager

SETUP Custom Metadata Types

Save Quick Save Cancel Undo Redo Layout Properties

Quick Find Field Name

Fields

Section	Create Invoice Fr...	Custom Metadata I	Last Modified By	Link Invoice To O...	Use Line Item
Blank Space	Custom Field 1 Id	Default Tax Id	Line Item Id (Dep...	Namespace Prefix	Use Single Line I...
Create Customer w	Custom Field 2 Id	Invoice Stage Nam	Link By Memo	Protected Componi	Use Tax Id
Created By	Custom Field 3 Id	Label	Link Customer By ..	QB Product Id	

QIME Config Sample

Label: Link Customer By Name
Name: qime Link Customer By Name
Type: Checkbox

Highlights Panel

Customize the highlights panel for this page layout...

Information (Header visible on edit only)

- Label Sample Text
- Custom Metadata Record Name
- Link By Memo ✓
- QB Product Id Sample Text
- Use Line Item ✓
- Protected Component ✓
- Namespace Prefix Sample Text

5 Click "Save"

Search Setup

Setup Home Object Manager

custom met

Custom Code

Custom Metadata Types

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SETUP Custom Metadata Types

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Create Customer w	Custom Field 2 Id	Invoice Stage Nam	Link By Memo	Protected Componi	Use Tax Id
Created By	Custom Field 3 Id	Label	Link Customer By ..	QB Product Id	

QIME Config Sample

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