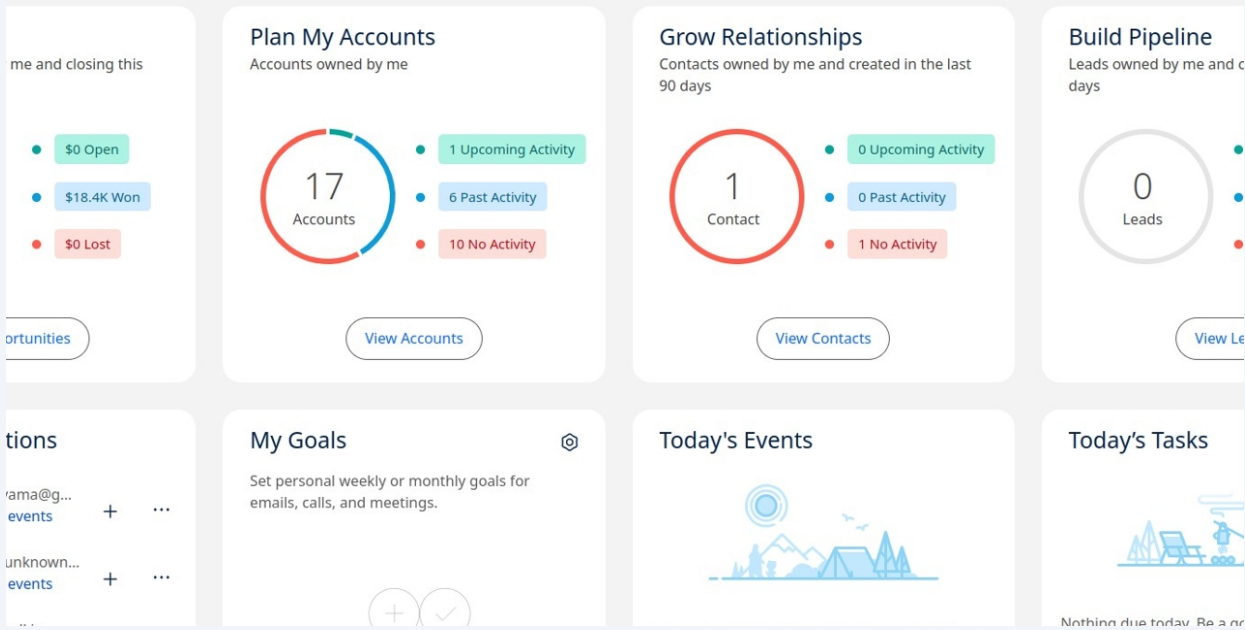


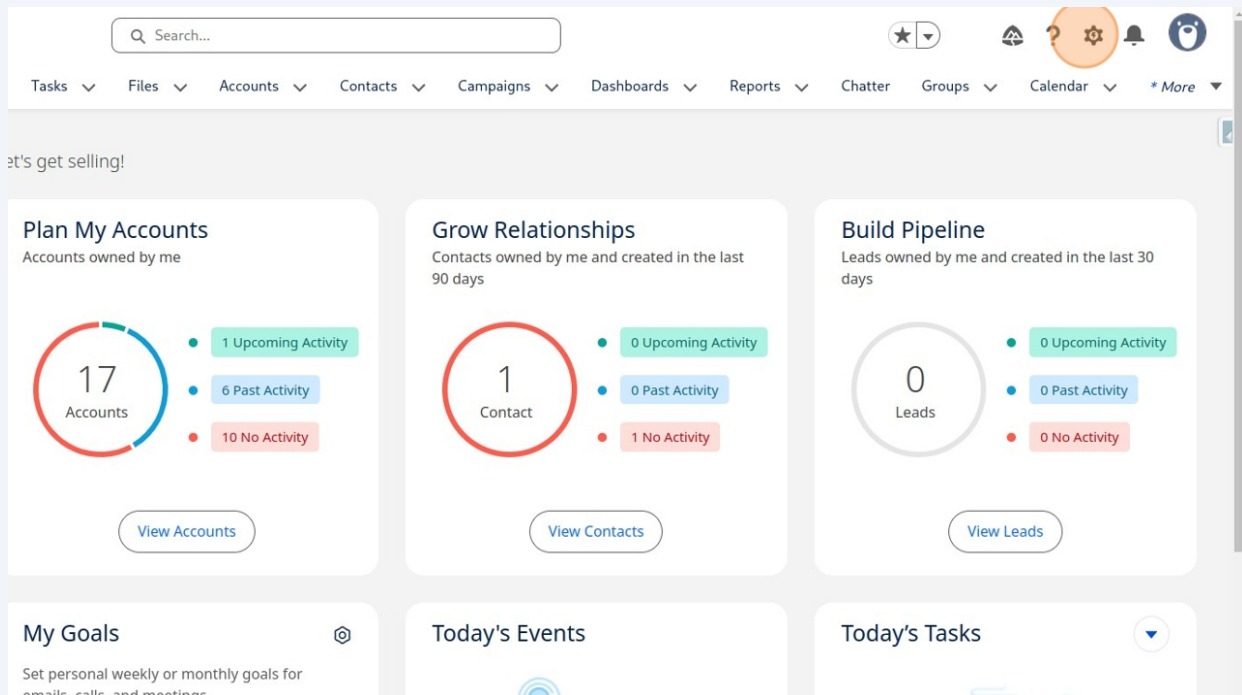
1

Navigate to Salesforce Home Page

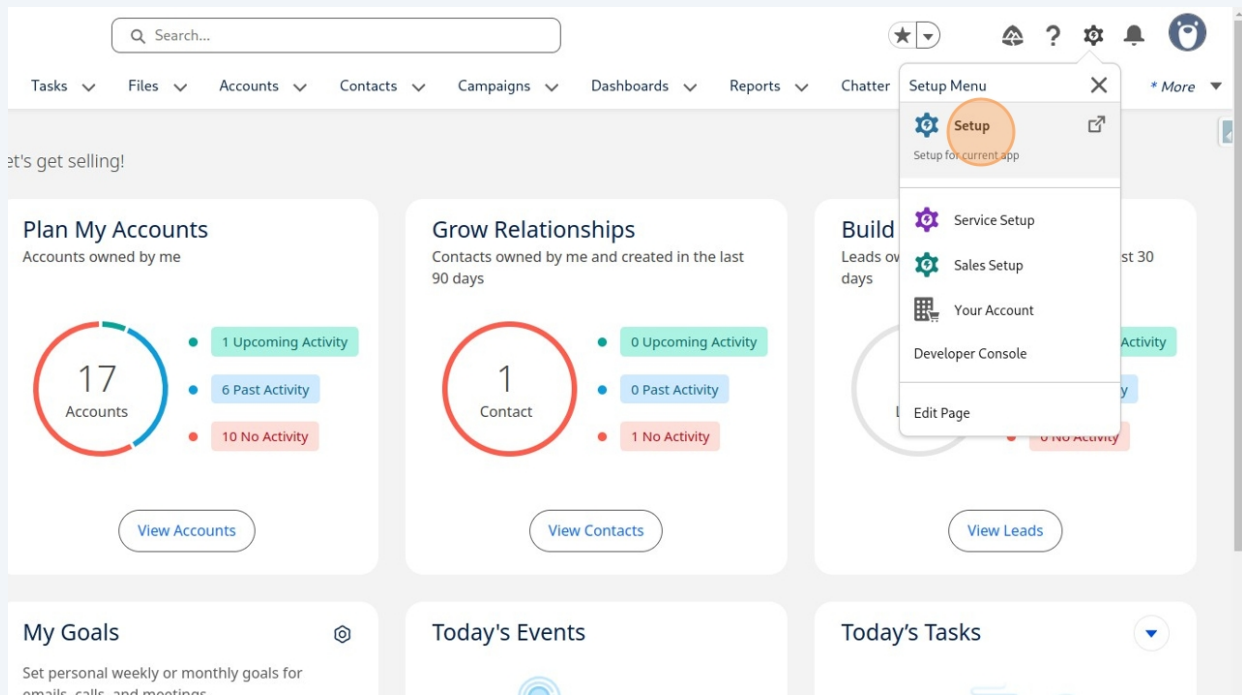
Good morning, Justin. Let's get selling!



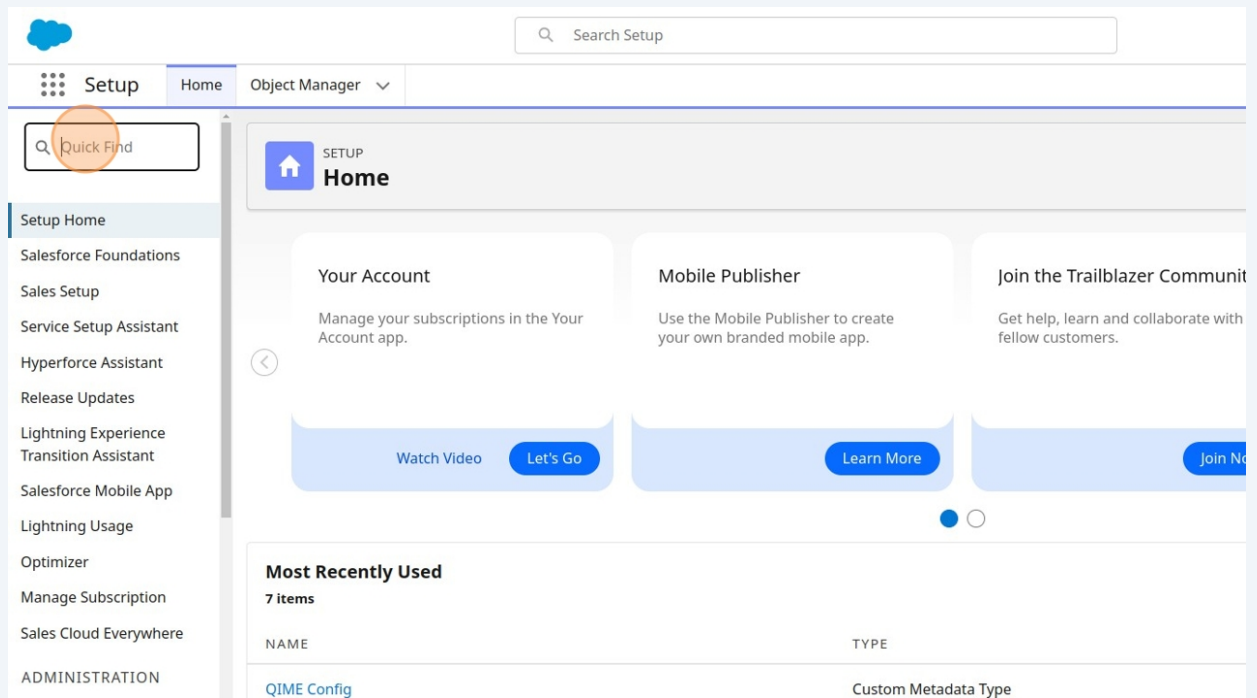
2 Click on the Cog



3 Open Setup



4 Click the "Quick Find" field.



5 Type "custom metadata" in the search box.

6 Click "Custom Metadata Types"

Setup Home Object Manager

Search Setup

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.

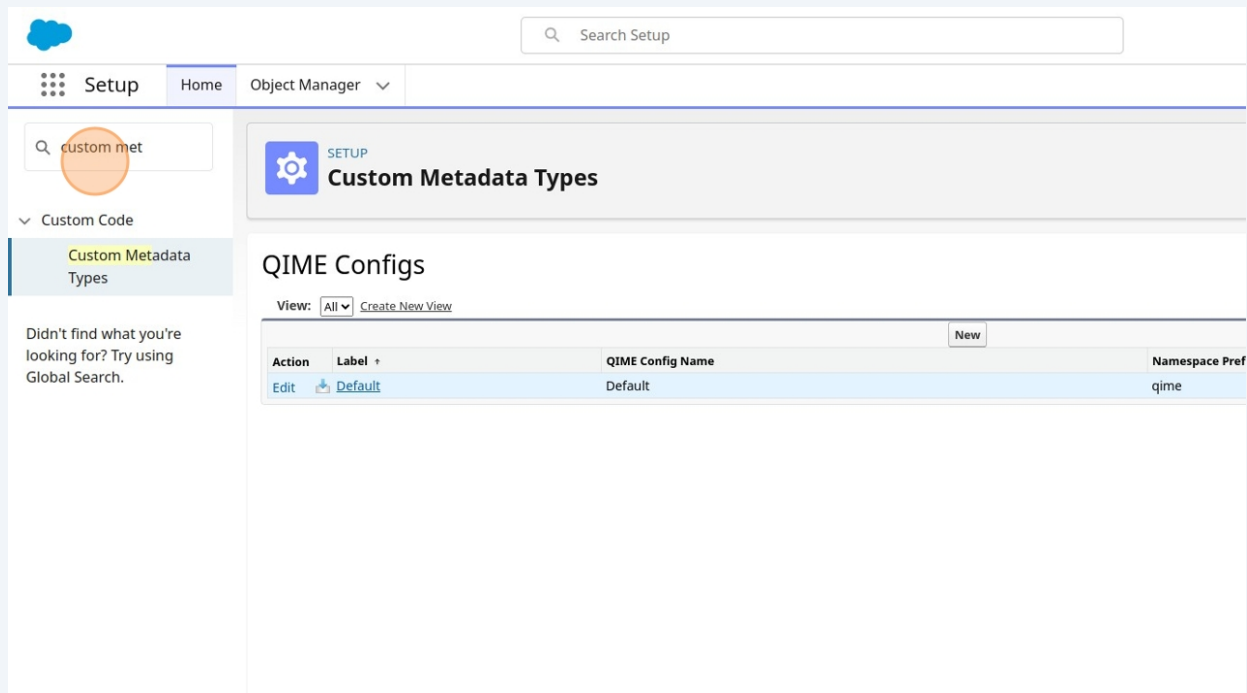
Rather than building apps from data records in custom objects or custom settings, you can create custom metadata types and add metadata records, deploy, and upgrade. Querying custom metadata records doesn't count against SOQL limits.

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"

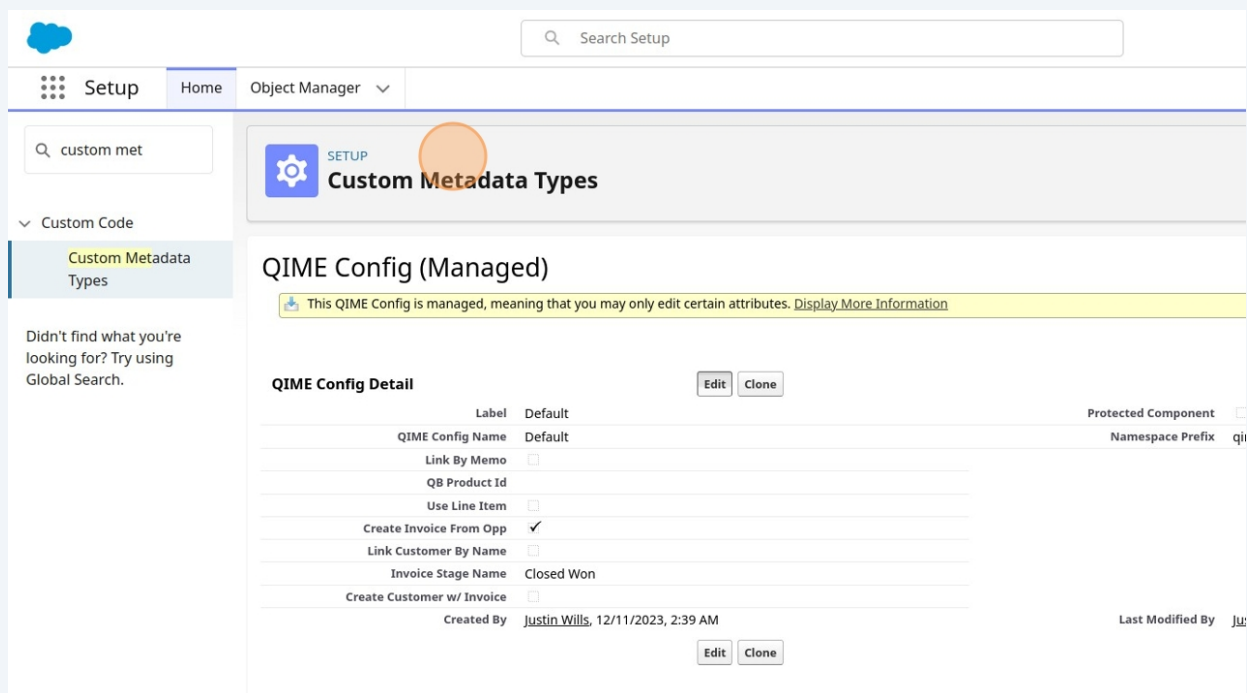


The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with "custom met" and a list of categories including "Custom Code" and "Custom Metadata Types". The main content area is titled "Custom Metadata Types" and shows a table of QIME Configs. The table has columns for Action,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

Action	Label	QIME Config Name	Namespace Prefix
Edit	Default	Default	qime

9

Click the "Edit" button.



The screenshot shows the Salesforce Setup interface for a specific QIME Config. The left sidebar is the same as in the previous screenshot. The main content area is titled "QIME Config (Managed)" and includes a warning message: "This QIME Config is managed, meaning that you may only edit certain attributes. [Display More Information](#)". Below this is a "QIME Config Detail" section with a table of attributes and their values. The "Edit" button is highlighted with an orange circle.

Label	Default	Protected Component
QIME Config Name	Default	<input type="checkbox"/>
Link By Memo	<input type="checkbox"/>	Namespace Prefix
QB Product Id	<input type="checkbox"/>	
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"/>	

Created By: Justin Wills, 12/11/2023, 2:39 AM

Last Modified By: ju

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 qim

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