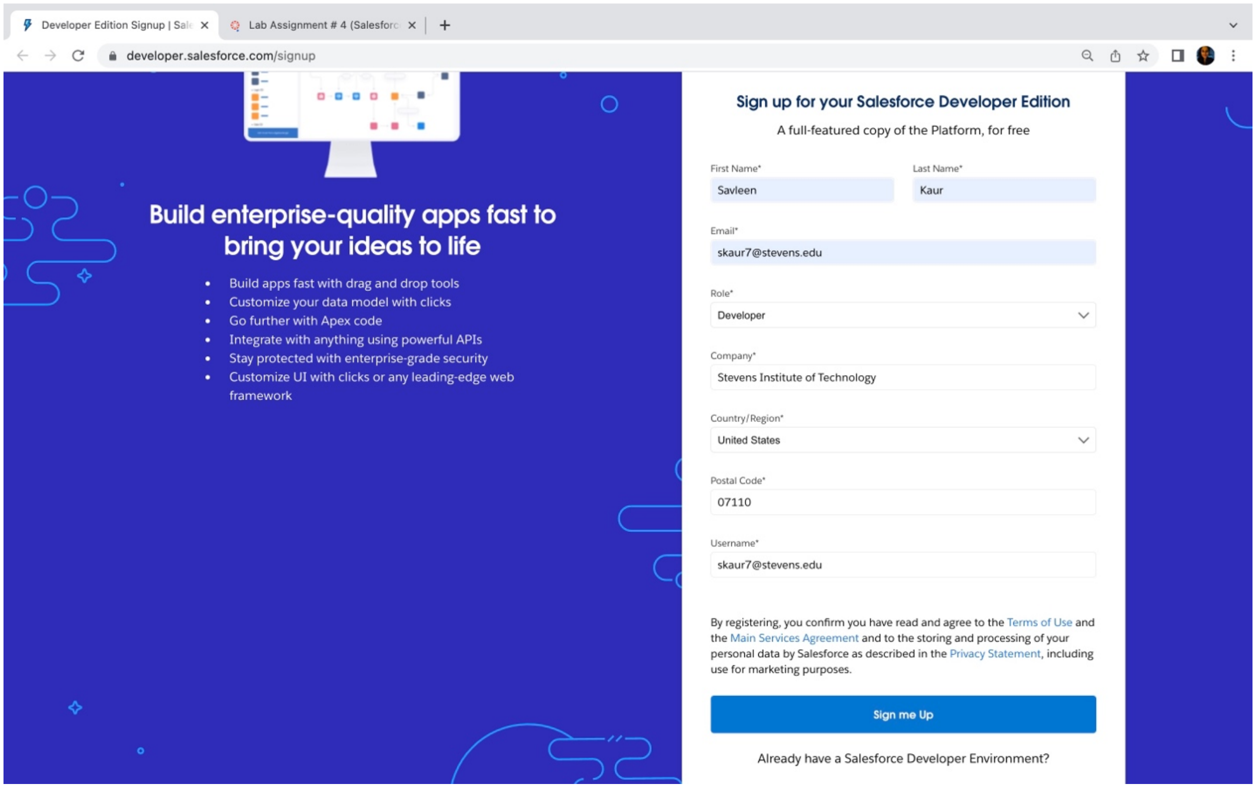
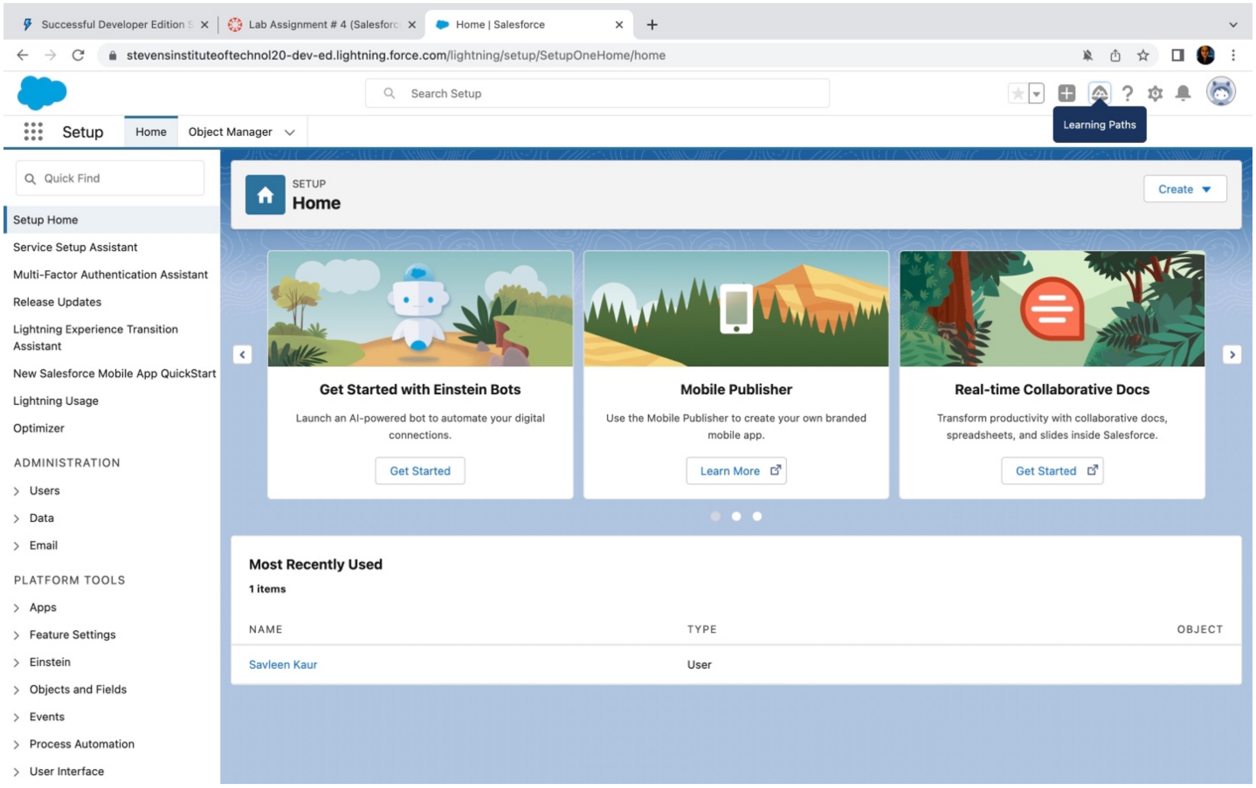
Lab Assignment 4

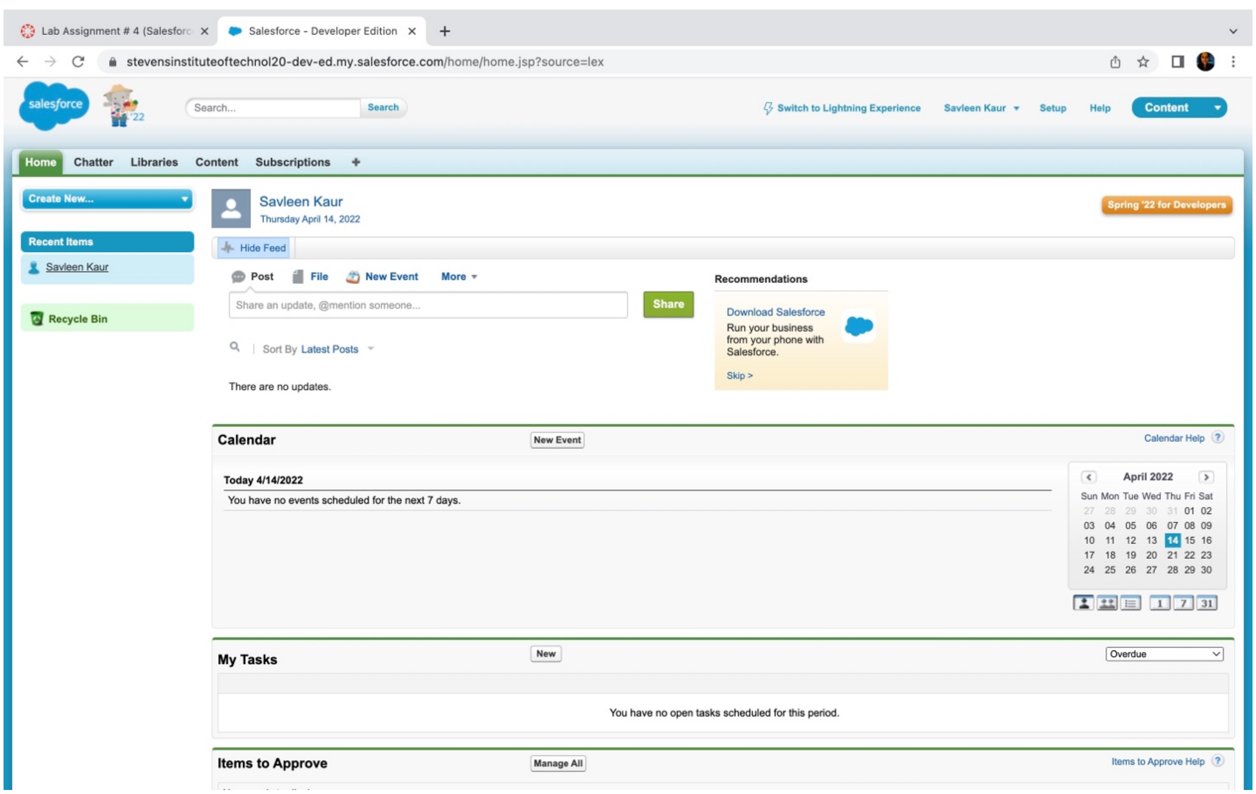
Start by creating an account at Salesforce



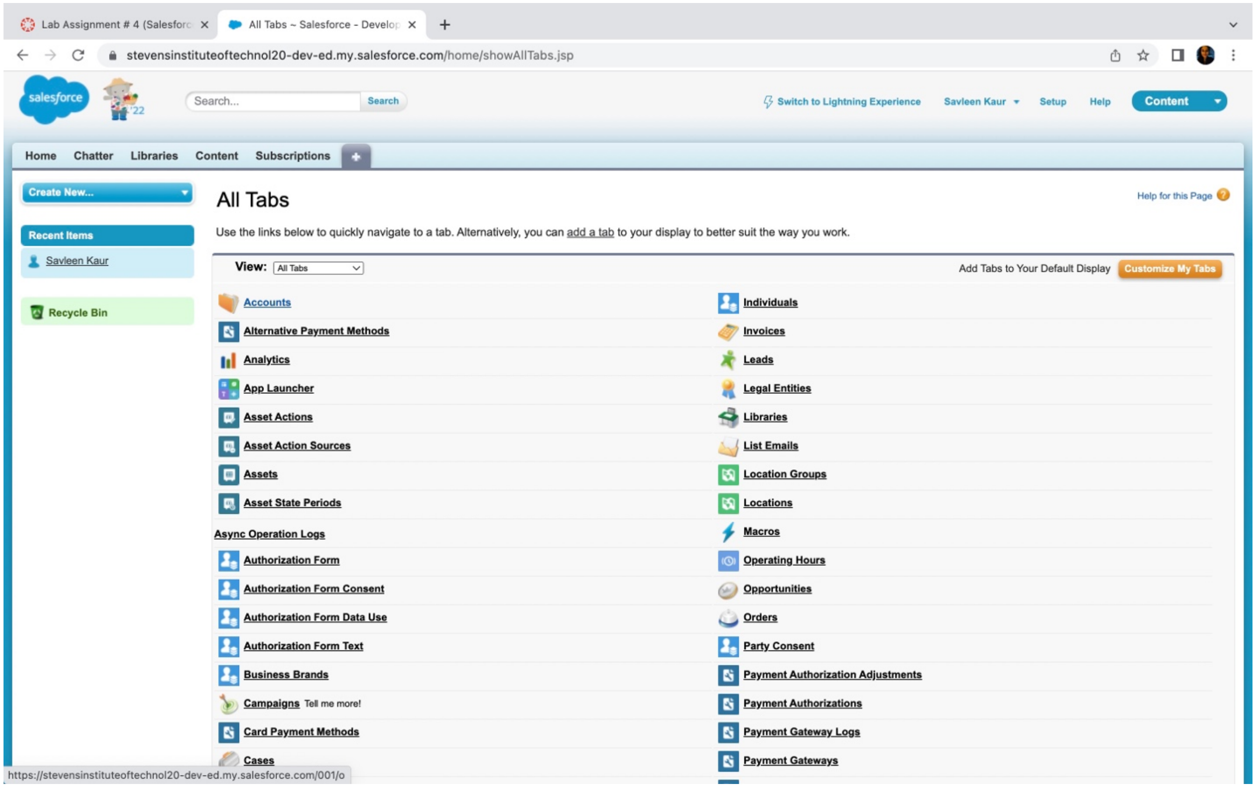
After creating account and verifying the account, I can see the homepage



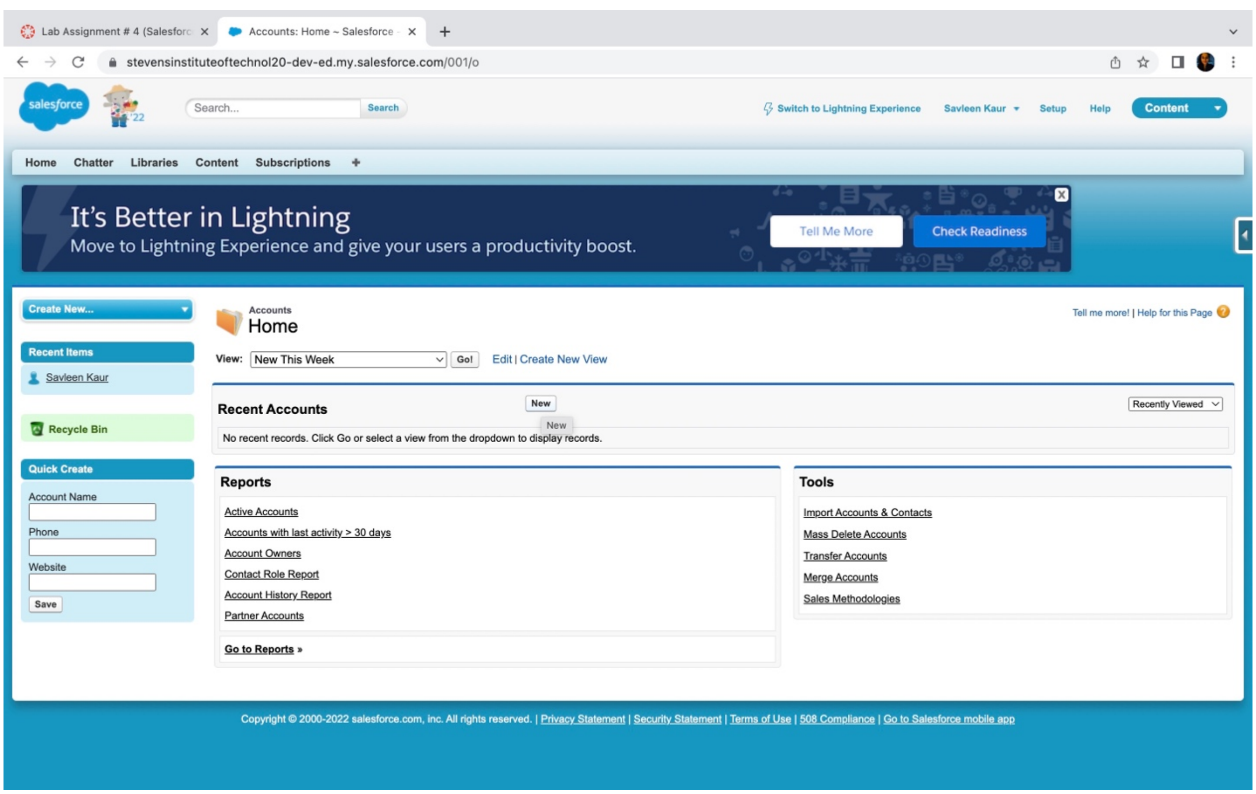
Click on View Profile and then click on view Salesforce Classic Mode



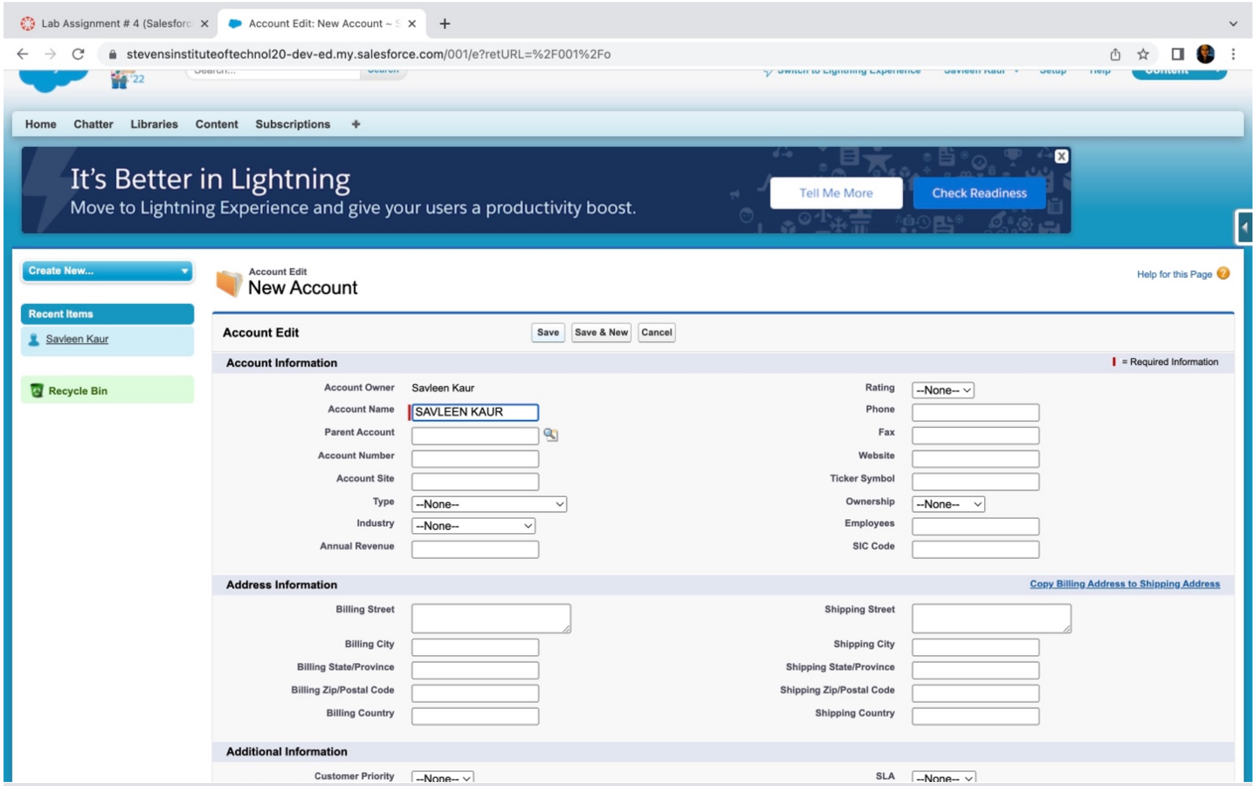
Click on + icon and then choose “Accounts”

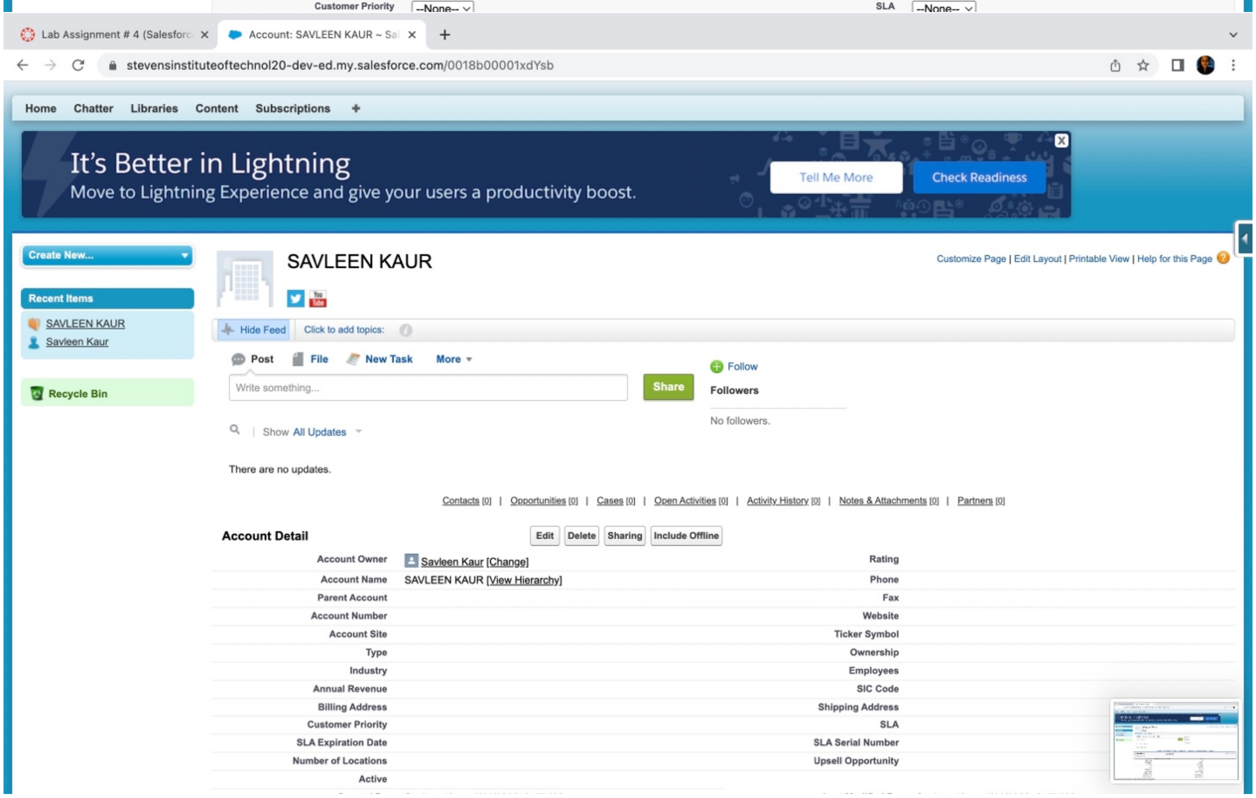


Click on “New”



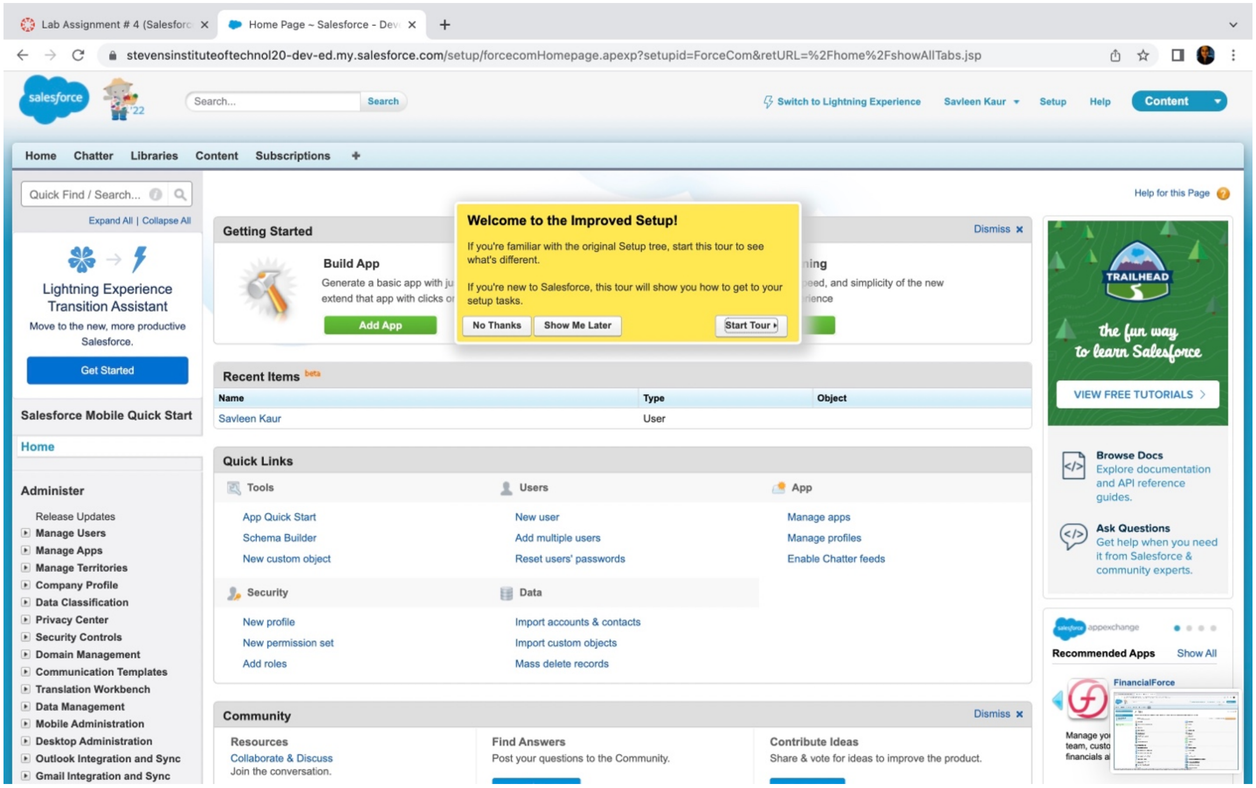
Give Account name as SAVLEEN KAUR and click on Save

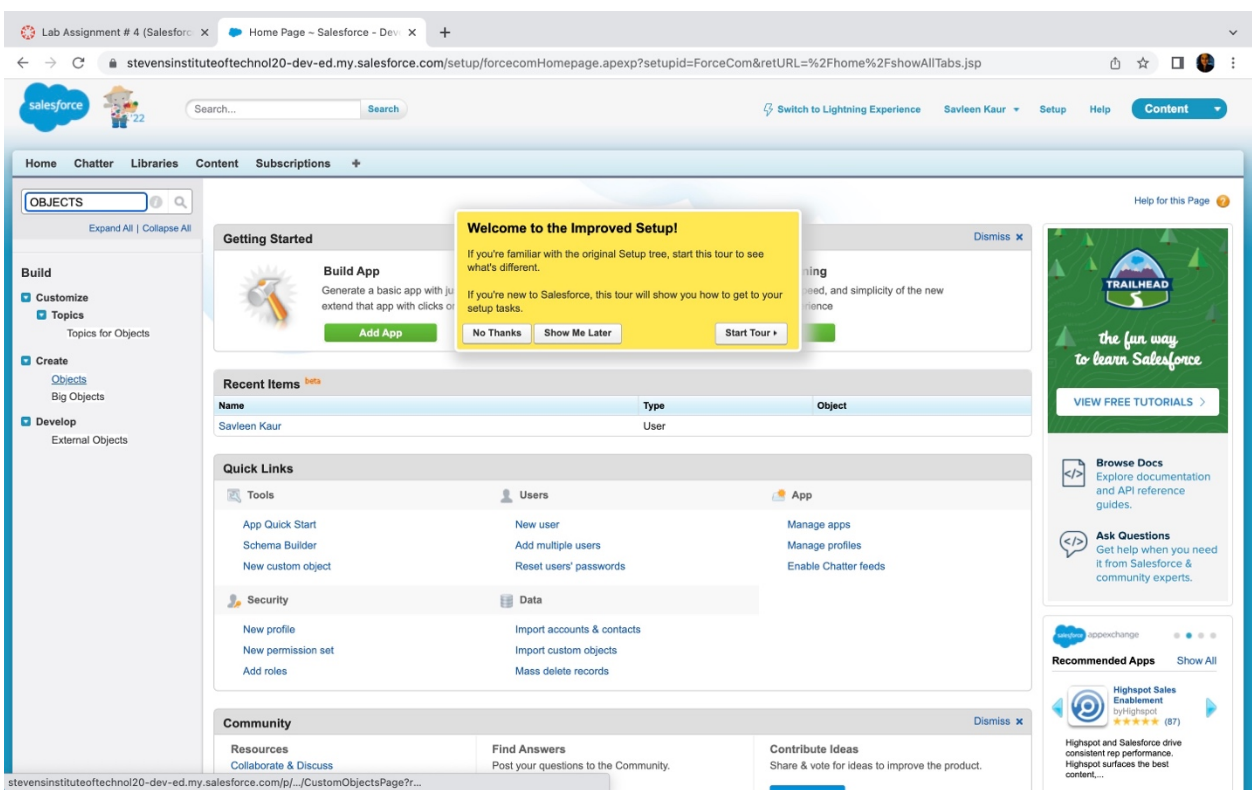




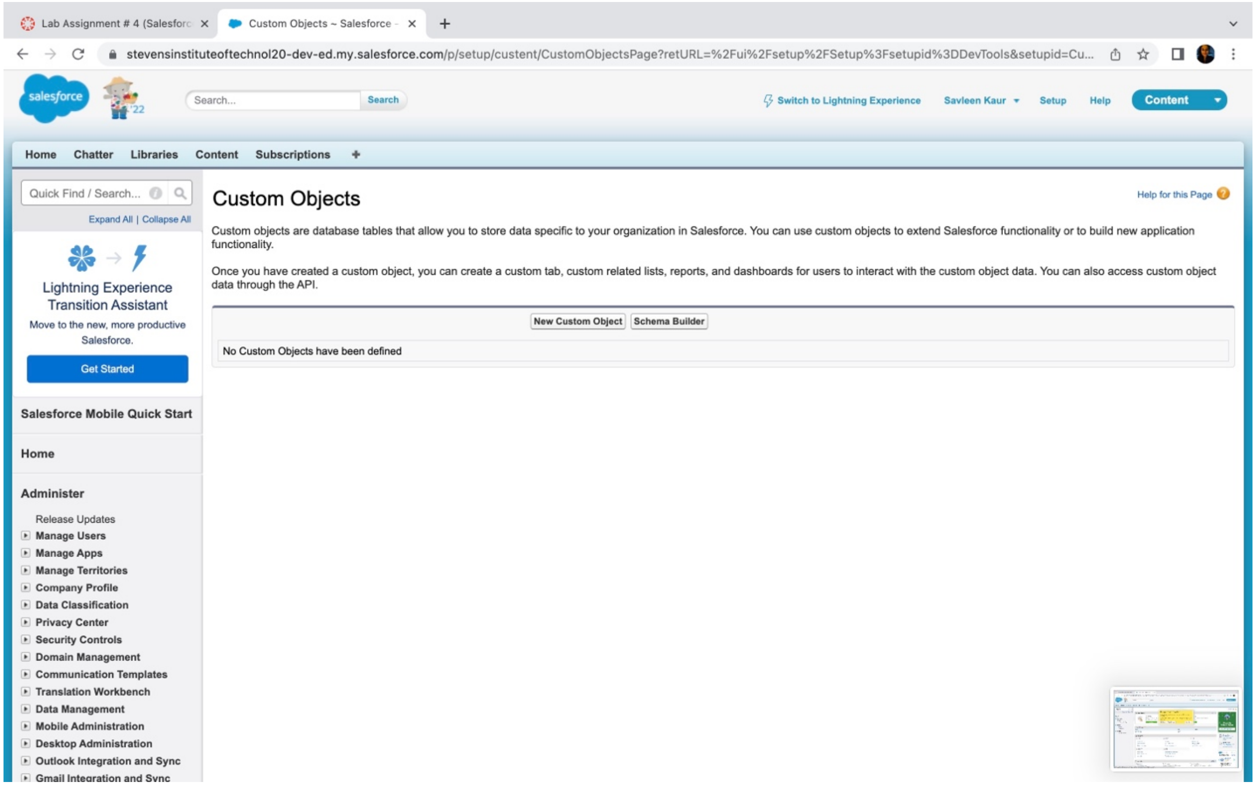
Creating Custom Objects and Fields

Click on Setup and search for Objects

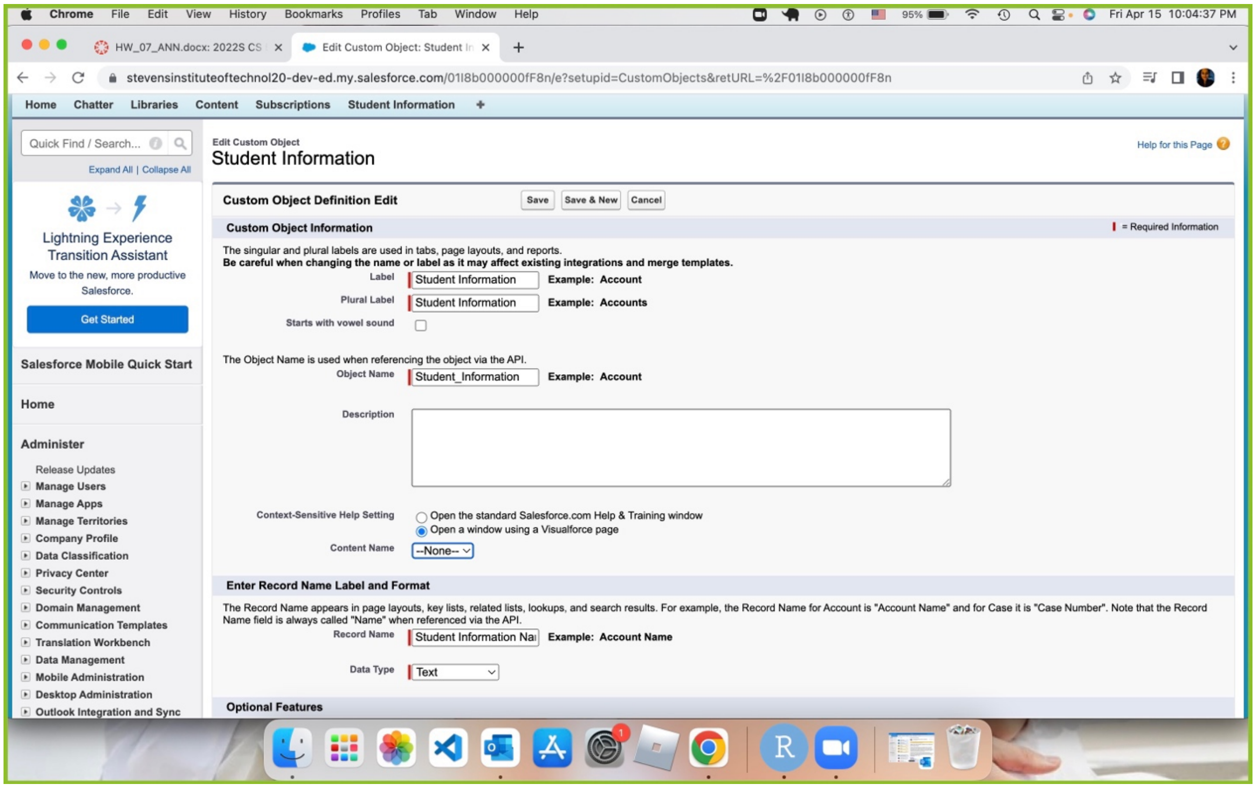


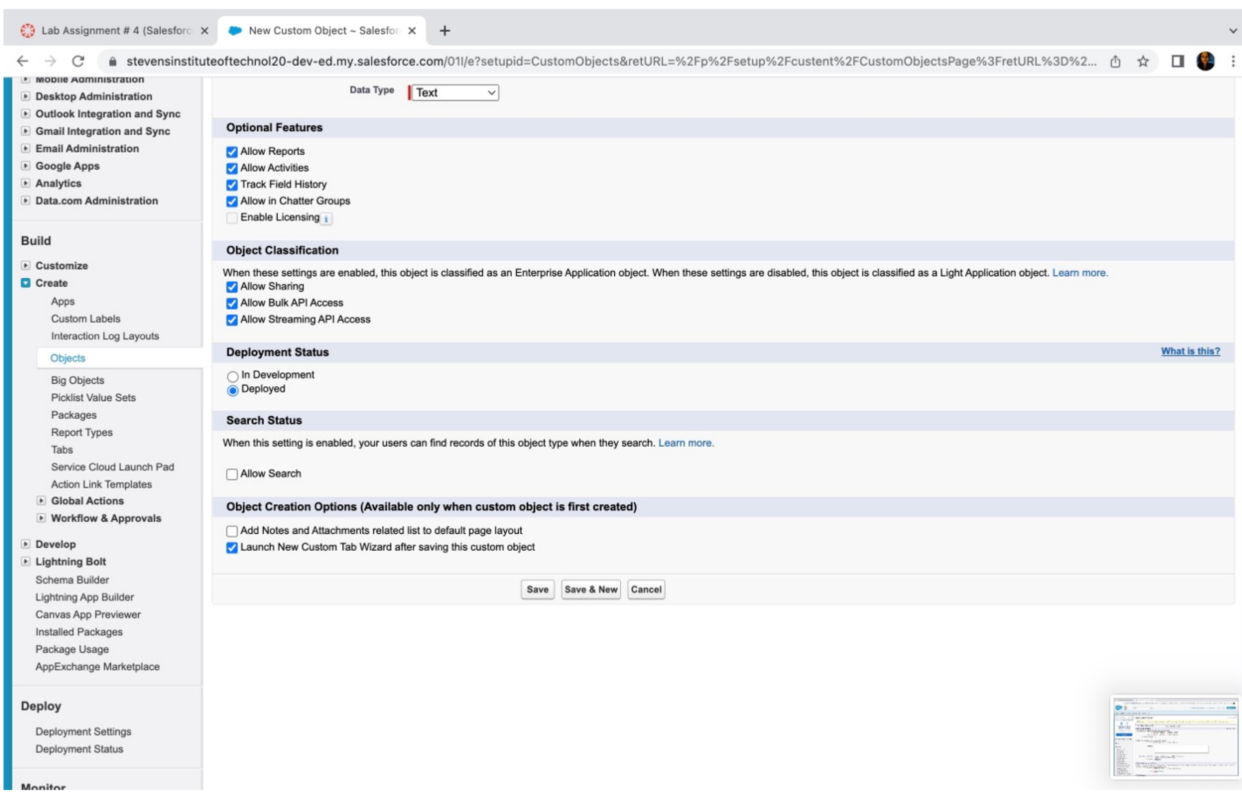


Click on New Custom Object



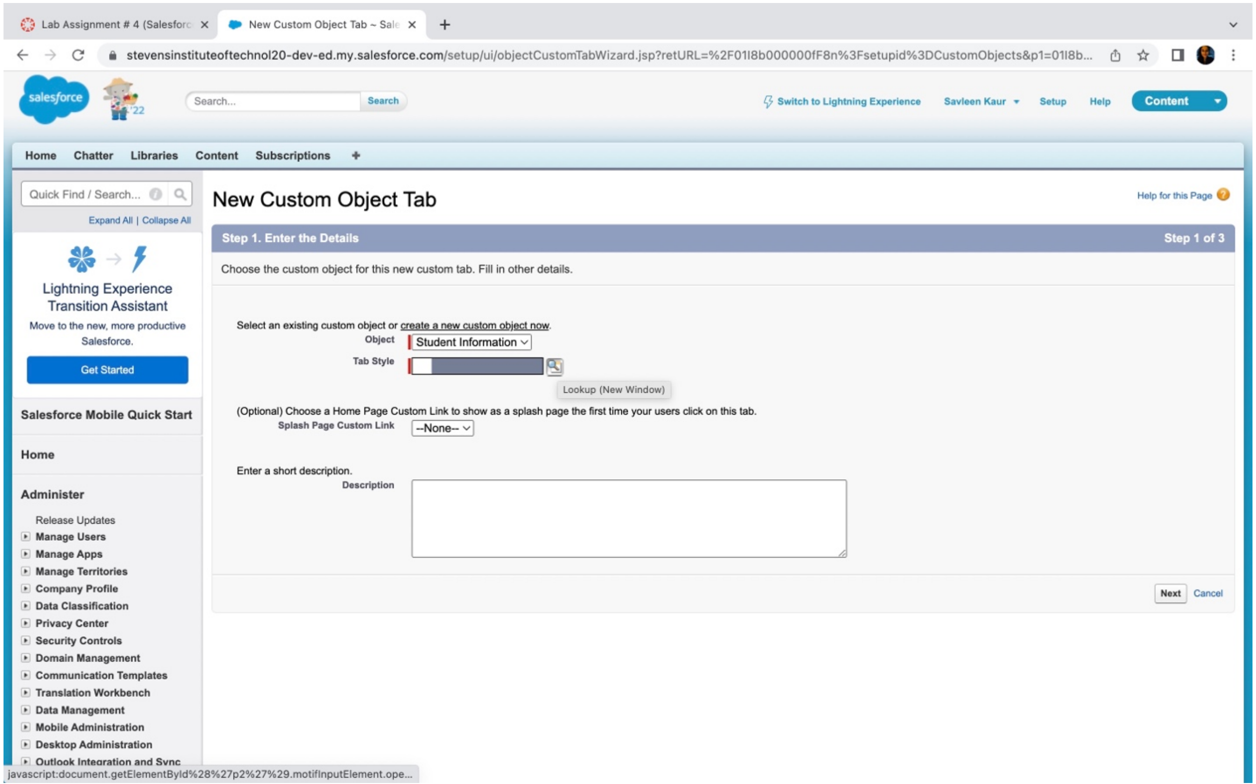
Give in the following details:
Label: Student Information
Plural Label: Student Information
Object Name: Student_Information
Context-Sensitive Help Setting: Open a window using a Visualforce page
Record Name: Student Name
Data Type: Text
Optional Features: All Checked except Enable Licensing
Object Classification: All Checked
Deployment Status: Deployed
Search Status: Unchecked Allow Search
Object Creation Options (Available only when custom object is first created):
Launch New Custom Tab Wizard after saving this custom object

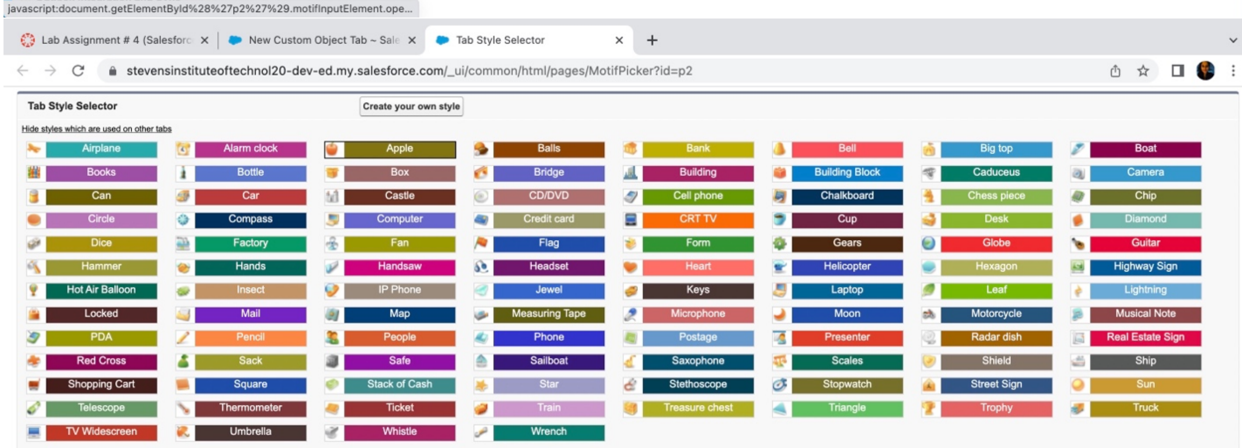


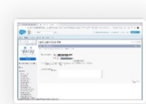


After this, click on Save

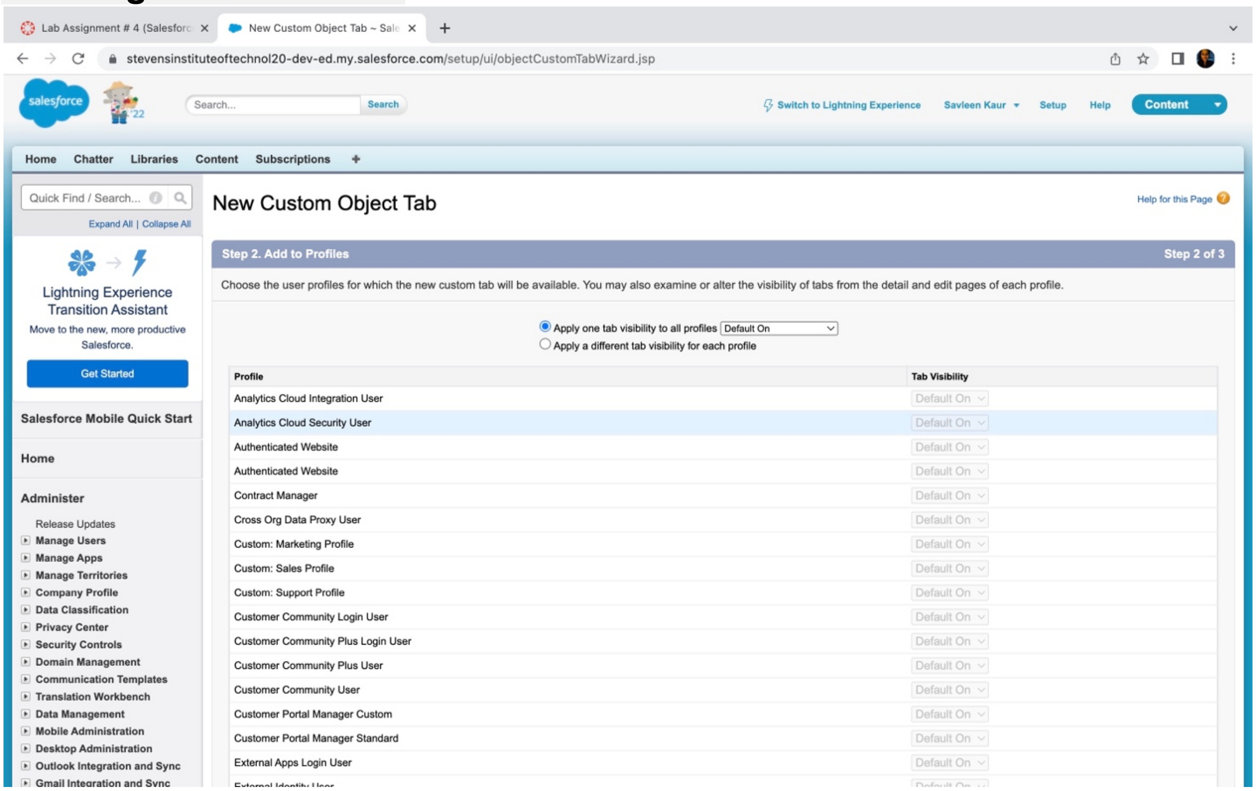
Click on tab style, I have selected Hot Air Balloon and then click on Next, then Next and Save



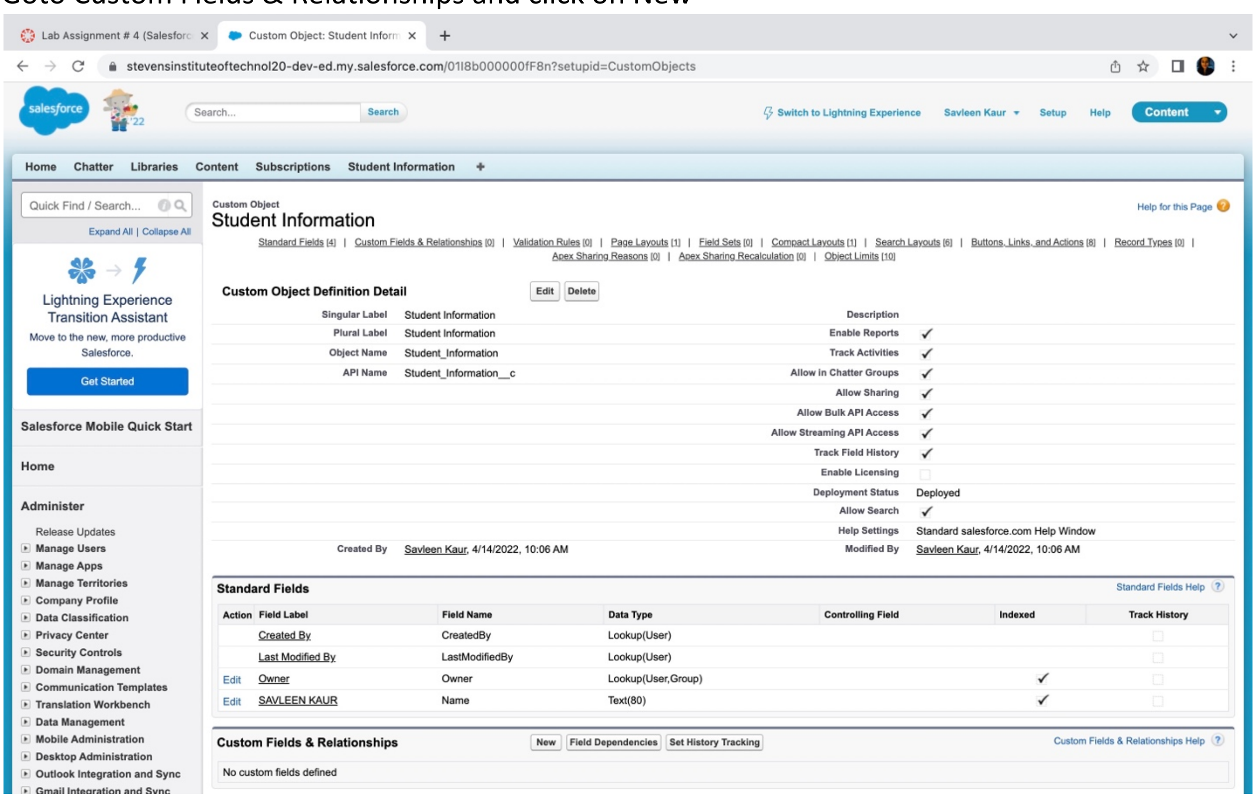




Creating Custom Fields



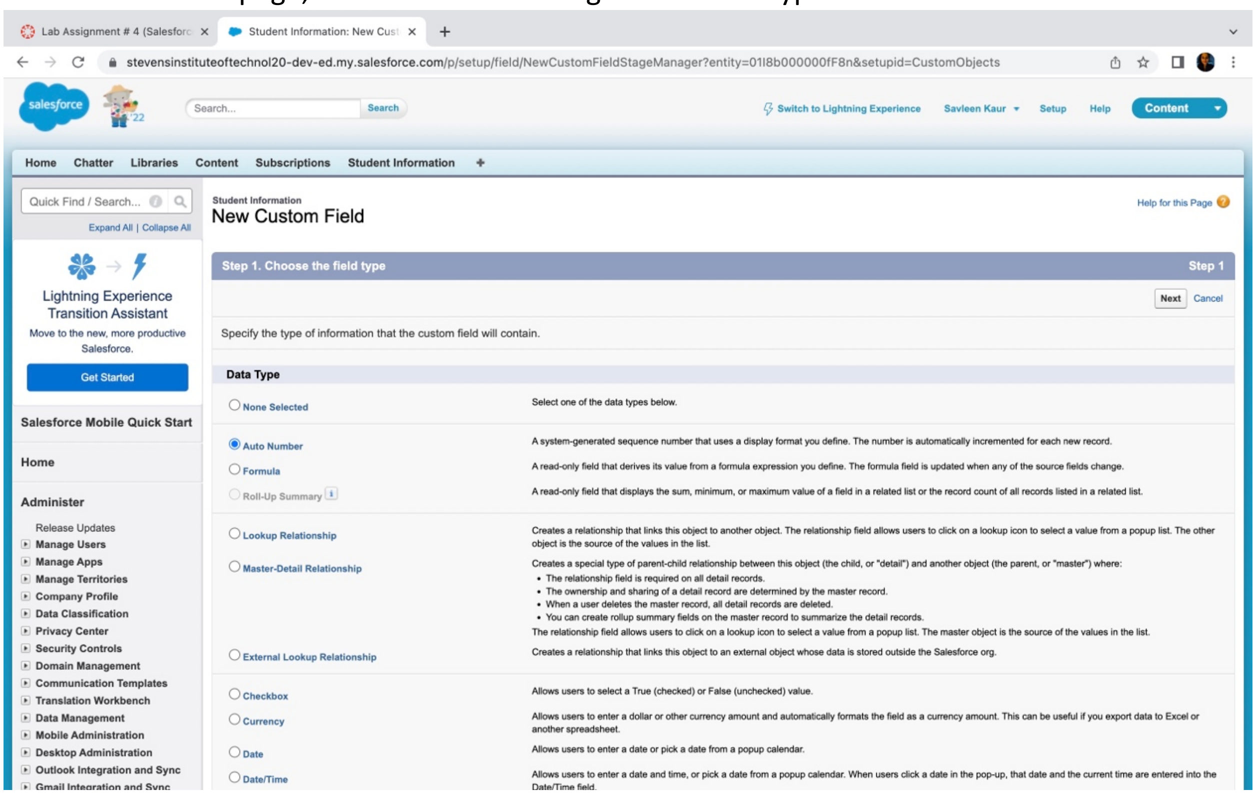
Goto Custom Fields & Relationships and click on New

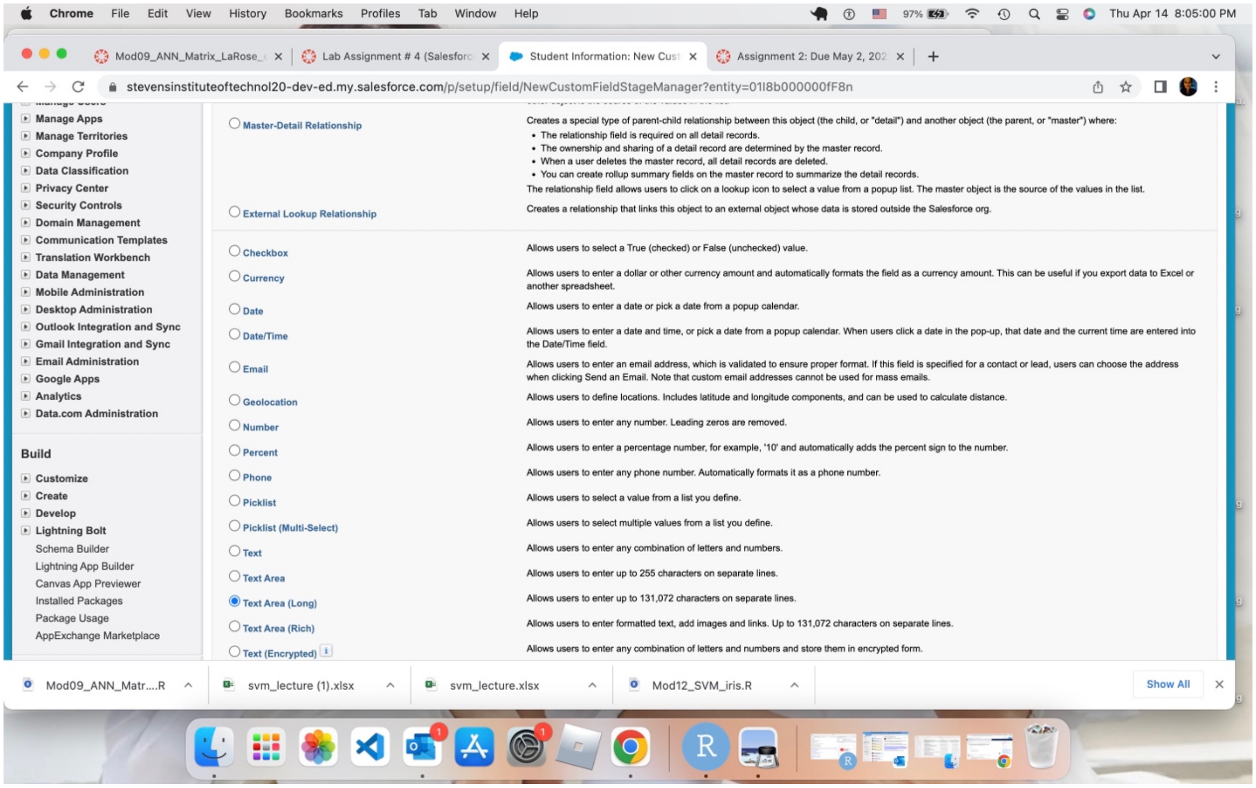


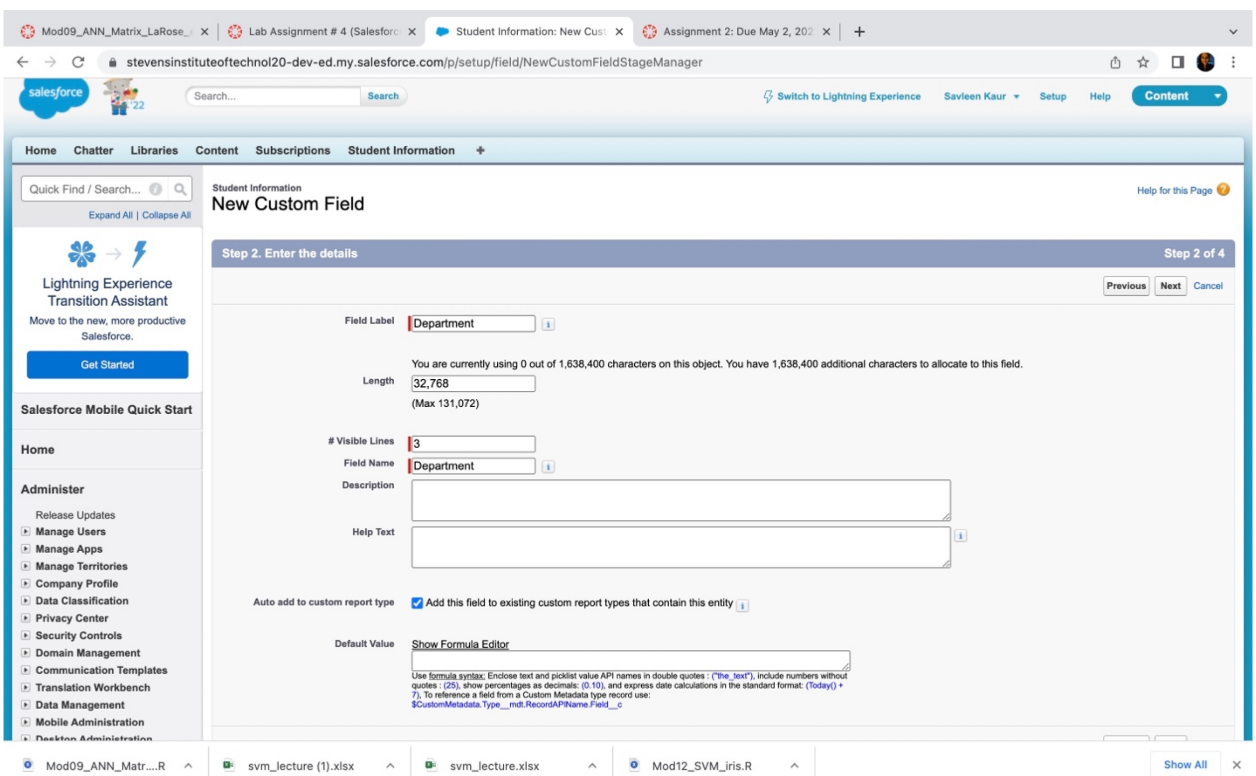
For the first Custom Field, give the following details:

Department:
Field Type: Text Area Long
Field Label: Department
Field Name: Department
Visible: Checked
Add to page layouts: Student Information Layout Checked

This is the default page, choose Text area long as the Field Type




Chrome File Edit View History Bookmarks Profiles Tab Window Help
97% Thu Apr 14 8:05:00 PM
Mod09_ANN_Matrix_LaRose_
Lab Assignment # 4 (Salesforc
Student Information: New Cust
Assignment 2: Due May 2, 202
stevensinstituteoftechnol20-dev-ed.my.salesforce.com/p/setup/field/NewCustomFieldStageManager?entity=01I8b000000fF8n
Manage Apps
Manage Territories
Company Profile
Data Classification
Privacy Center
Security Controls
Domain Management
Communication Templates
Translation Workbench
Data Management
Mobile Administration
Desktop Administration
Outlook Integration and Sync
Gmail Integration and Sync
Email Administration
Google Apps
Analytics
Data.com Administration
Build
Customize
Create
Develop
Lightning Bolt
Schema Builder
Lightning App Builder
Canvas App Previewer
Installed Packages
Package Usage
AppExchange Marketplace
Master-Detail Relationship
Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:
• The relationship field is required on all detail records.
• The ownership and sharing of a detail record are determined by the master record.
• When a user deletes the master record, all detail records are deleted.
• You can create rollup summary fields on the master record to summarize the detail records.
The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.
External Lookup Relationship
Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.
Checkbox
Allows users to select a True (checked) or False (unchecked) value.
Currency
Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
Date
Allows users to enter a date or pick a date from a popup calendar.
Date/Time
Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
Email
Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
Geolocation
Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
Number
Allows users to enter any number. Leading zeros are removed.
Percent
Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.
Phone
Allows users to enter any phone number. Automatically formats it as a phone number.
Picklist
Allows users to select a value from a list you define.
Picklist (Multi-Select)
Allows users to select multiple values from a list you define.
Text
Allows users to enter any combination of letters and numbers.
Text Area
Allows users to enter up to 255 characters on separate lines.
Text Area (Long)
Allows users to enter up to 131,072 characters on separate lines.
Text Area (Rich)
Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.
Text (Encrypted)
Allows users to enter any combination of letters and numbers and store them in encrypted form.
Mod09_ANN_Matr....R
svm_lecture (1).xlsx
svm_lecture.xlsx
Mod12_SVM_iris.R
Show All


Mod09_ANN_Matrix_LaRose_
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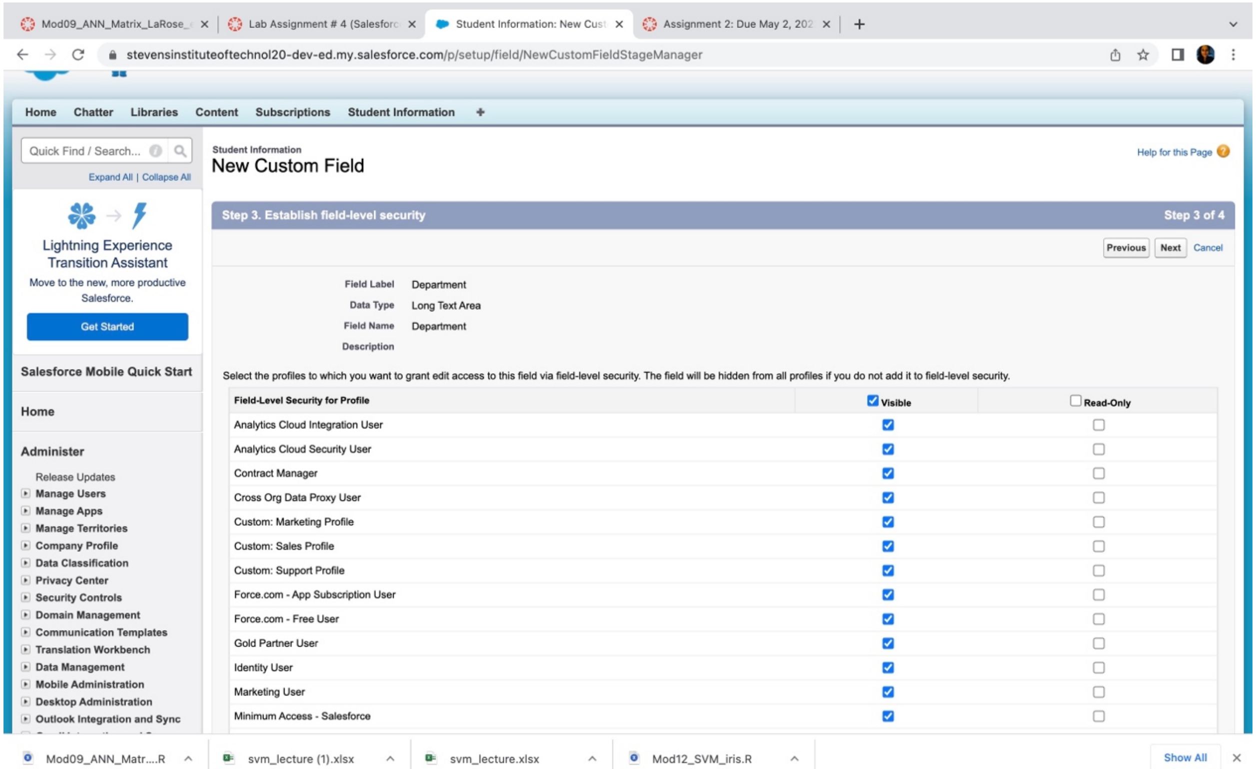
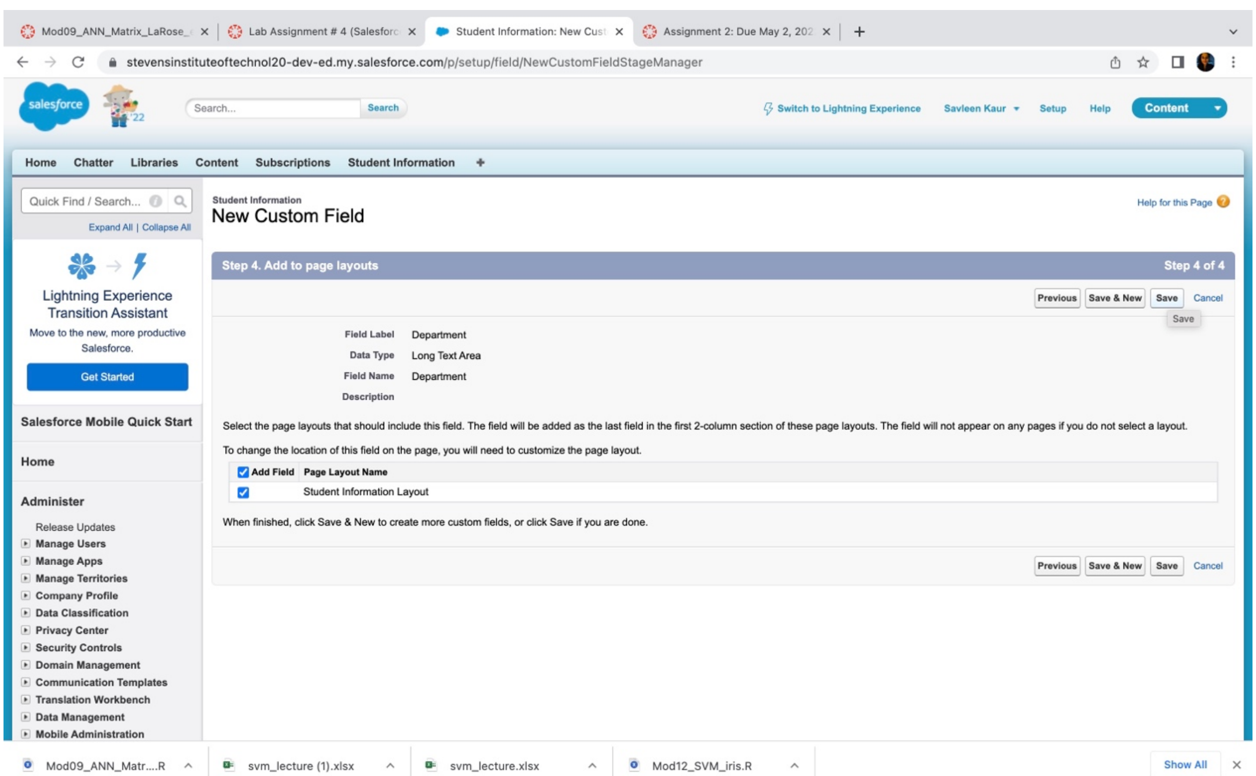
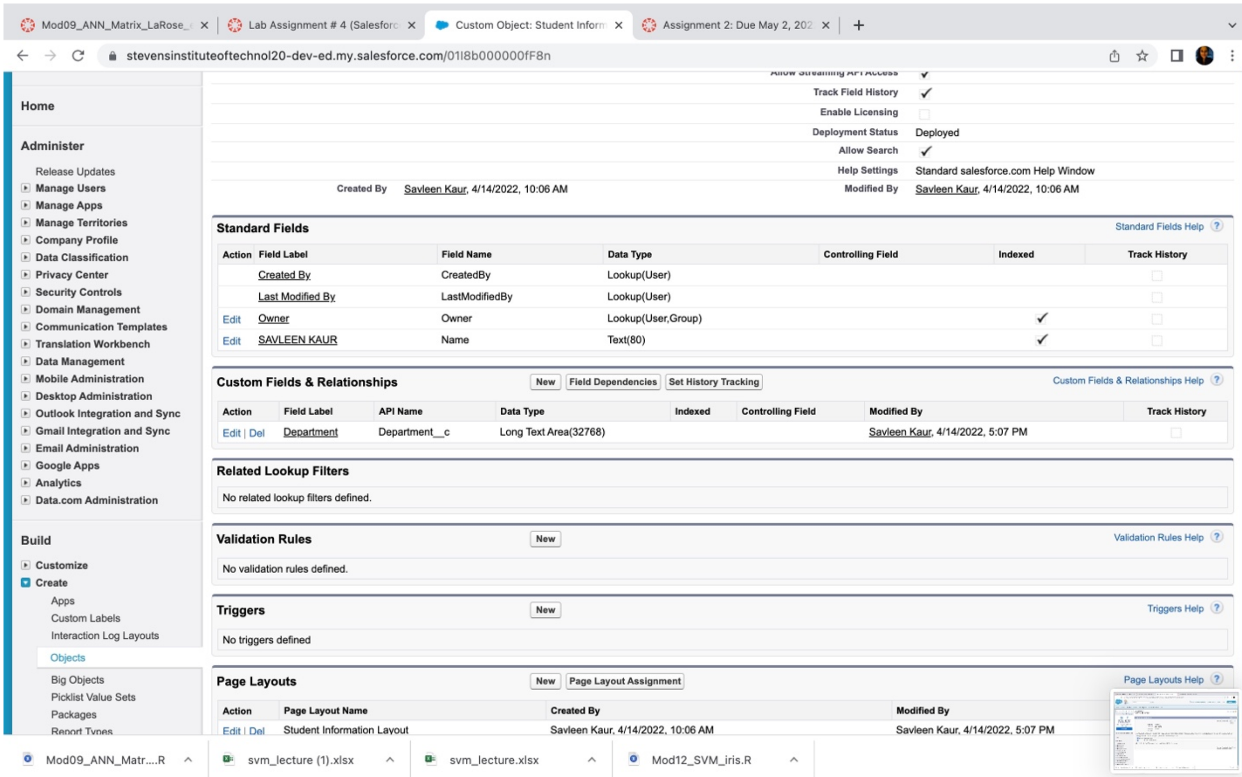
stevensinstituteoftechnol20-dev-ed.my.salesforce.com/p/setup/field/NewCustomFieldStageManager
salesforce
Search...
Search
Switch to Lightning Experience
Savleen Kaur
Setup
Help
Content
Home Chatter Libraries Content Subscriptions Student Information +
Quick Find / Search...
Expand All | Collapse All
Lightning Experience Transition Assistant
Move to the new, more productive Salesforce.
Get Started
Salesforce Mobile Quick Start
Home
Administer
Release Updates
Manage Users
Manage Apps
Manage Territories
Company Profile
Data Classification
Privacy Center
Security Controls
Domain Management
Communication Templates
Translation Workbench
Data Management
Mobile Administration
Student Information
New Custom Field
Help for this Page
Step 2. Enter the details
Step 2 of 4
Previous Next Cancel
Field Label Department
You are currently using 0 out of 1,638,400 characters on this object. You have 1,638,400 additional characters to allocate to this field.
Length 32,768
(Max 131,072)
Visible Lines 3
Field Name Department
Description
Help Text
Auto add to custom report type
Add this field to existing custom report types that contain this entity
Default Value
Show Formula Editor
Use formula syntax: Enclose text and picklist value API names in double quotes : ("the_text"), include numbers without quotes : (25), show percentages as decimals: (0.10), and express date calculations in the standard format: (Today() + 7), To reference a field from a Custom Metadata type record use: $CustomMetadata.Type__mdt.RecordAPIName.Field__c
Mod09_ANN_Matr....R
svm_lecture (1).xlsx
svm_lecture.xlsx
Mod12_SVM_iris.R
Show All



Click on Save





For second Custom field, give the following details:

CWID:

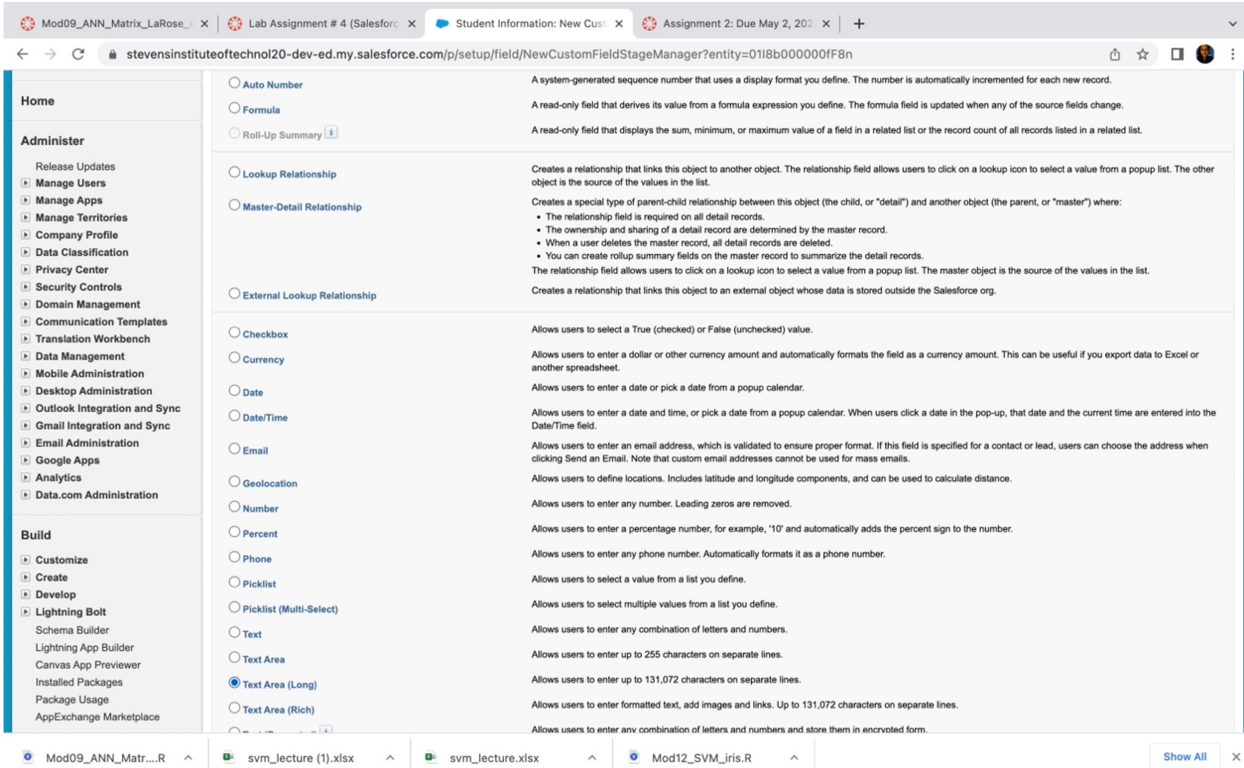
Field Type: Text Area Long

Field Label: CWID

Field Name: CWID

Visible: Checked

Add to page layouts: Student Information Layout Checked


Mod09_ANN_Matrix_LaRose_
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Assignment 2: Due May 2, 202
stevensinstituteoftechnol20-dev-ed.my.salesforce.com/p/setup/field/NewCustomFieldStageManager?entity=01I8b000000fF8n
Home
Administer
Release Updates
Manage Users
Manage Apps
Manage Territories
Company Profile
Data Classification
Privacy Center
Security Controls
Domain Management
Communication Templates
Translation Workbench
Data Management
Mobile Administration
Desktop Administration
Outlook Integration and Sync
Gmail Integration and Sync
Email Administration
Google Apps
Analytics
Data.com Administration
Build
Customize
Create
Develop
Lightning Bolt
Schema Builder
Lightning App Builder
Canvas App Previewer
Installed Packages
Package Usage
AppExchange Marketplace
Auto Number
A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
Formula
A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
Roll-Up Summary
A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
Lookup Relationship
Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
Master-Detail Relationship
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The ownership and sharing of a detail record are determined by the master record.
When a user deletes the master record, all detail records are deleted.
You can create rollup summary fields on the master record to summarize the detail records.
The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.
External Lookup Relationship
Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.
Checkbox
Allows users to select a True (checked) or False (unchecked) value.
Currency
Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
Date
Allows users to enter a date or pick a date from a popup calendar.
Date/Time
Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
Email
Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
Geolocation
Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
Number
Allows users to enter any number. Leading zeros are removed.
Percent
Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.
Phone
Allows users to enter any phone number. Automatically formats it as a phone number.
Picklist
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Picklist (Multi-Select)
Allows users to select multiple values from a list you define.
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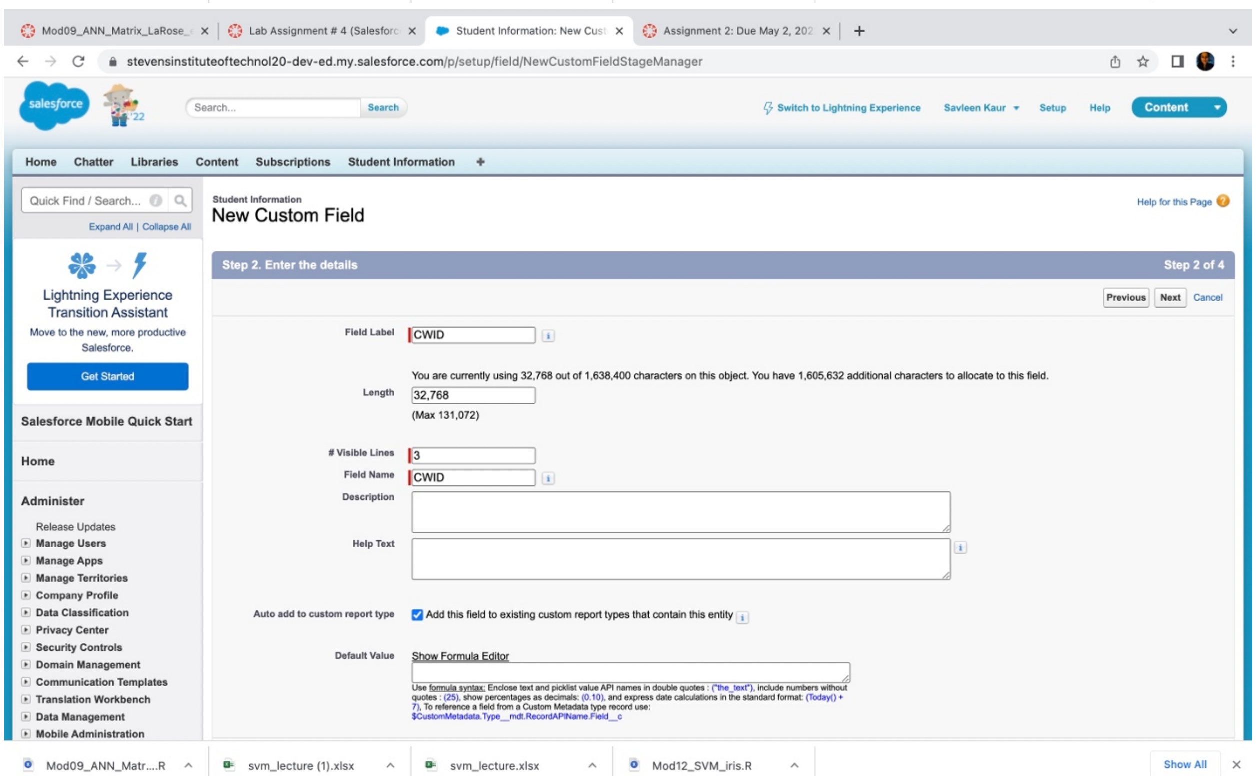
Text Area (Long)
Allows users to enter up to 131,072 characters on separate lines.
Text Area (Rich)
Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.
Allows users to enter any combination of letters and numbers and store them in encrypted form.
Mod09_ANN_Matr....R
svm_lecture (1).xlsx
svm_lecture.xlsx
Mod12_SVM_iris.R
Show All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salesforce
Search...
Search
Switch to Lightning Experience
Savleen Kaur
Setup
Help
Content
Home
Chatter
Libraries
Content
Subscriptions
Student Information
Quick Find / Search...
Expand All | Collapse All
Lightning Experience Transition Assistant
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Manage Territories
Company Profile
Data Classification
Privacy Center
Security Controls
Domain Management
Communication Templates
Translation Workbench
Data Management
Mobile Administration
Student Information
New Custom Field
Help for this Page
Step 2. Enter the details
Step 2 of 4
Previous
Next
Cancel
Field Label
CWID
You are currently using 32,768 out of 1,638,400 characters on this object. You have 1,605,632 additional characters to allocate to this field.
Length
32,768
(Max 131,072)
Visible Lines
3
Field Name
CWID
Description
Help Text
Auto add to custom report type
Add this field to existing custom report types that contain this entity
Default Value
Show Formula Editor
Use formula syntax: Enclose text and picklist value API names in double quotes : ("the_text"), include numbers without quotes : (25), show percentages as decimals: (0.10), and express date calculations in the standard format: (Today() + 7). To reference a field from a Custom Metadata type record use: $CustomMetadata.Type__mdt.RecordAPIName.Field__c
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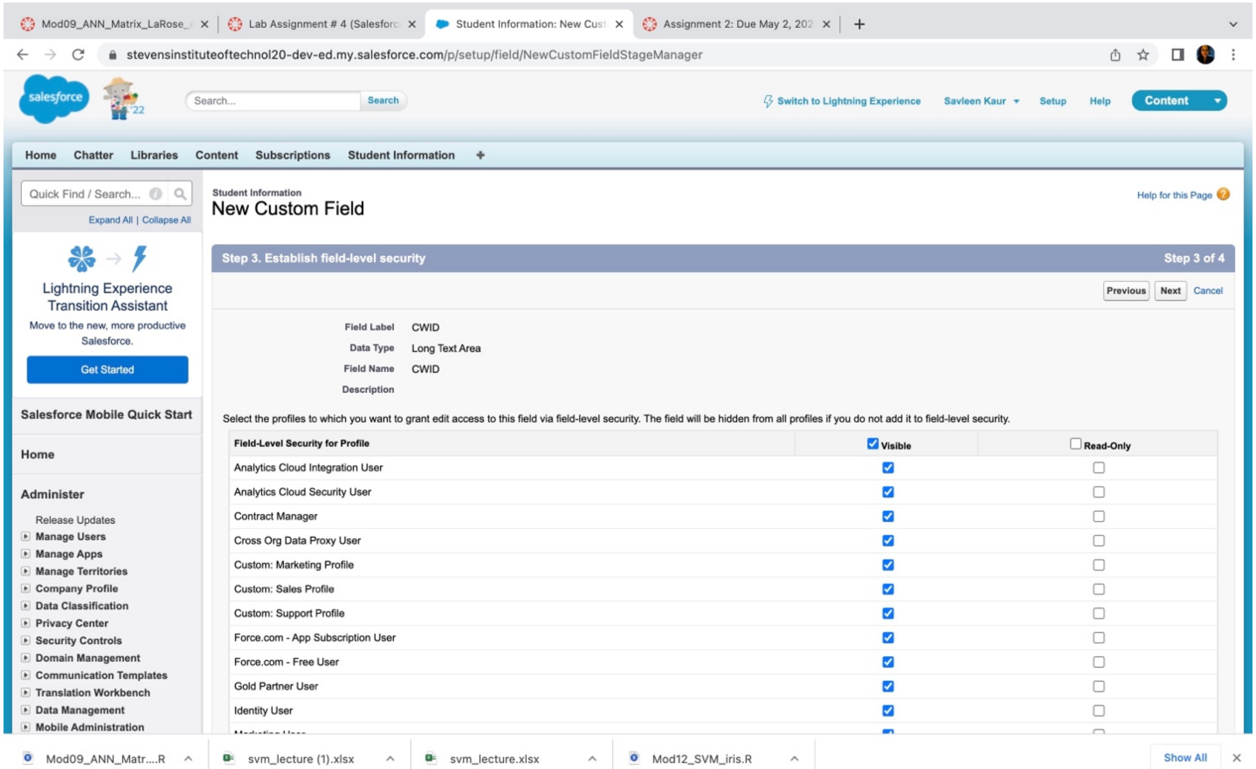
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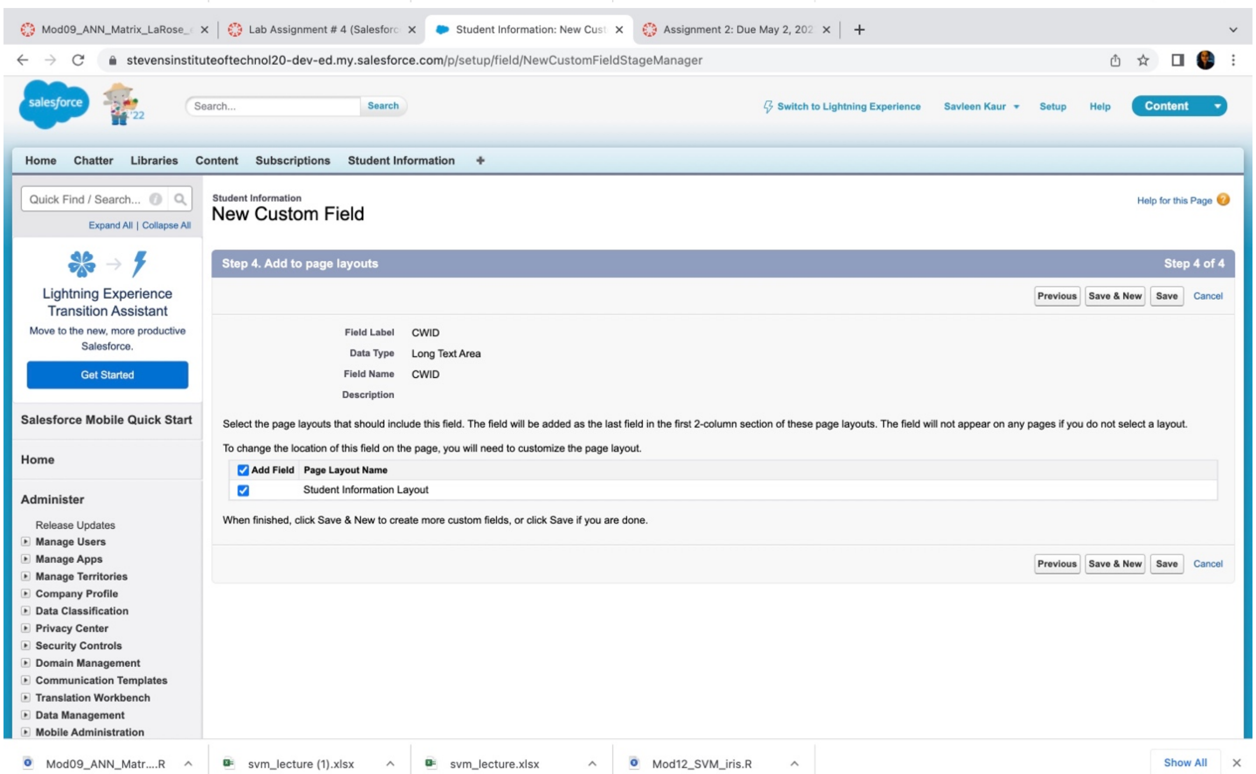
Security Controls
Domain Management
Communication Templates
Translation Workbench
Data Management
Mobile Administration
Student Information
New Custom Field
Help for this Page
Step 3. Establish field-level security
Step 3 of 4
Previous
Next
Cancel
Field Label CWID
Data Type Long Text Area
Field Name CWID
Description
Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.
Field-Level Security for Profile
Visible
Read-Only
Analytics Cloud Integration User
Analytics Cloud Security User
Contract Manager
Cross Org Data Proxy User
Custom: Marketing Profile
Custom: Sales Profile
Custom: Support Profile
Force.com - App Subscription User
Force.com - Free User
Gold Partner User
Identity User
Mod09_ANN_Matr....R
svm_lecture (1).xlsx
svm_lecture.xlsx
Mod12_SVM_iris.R
Show All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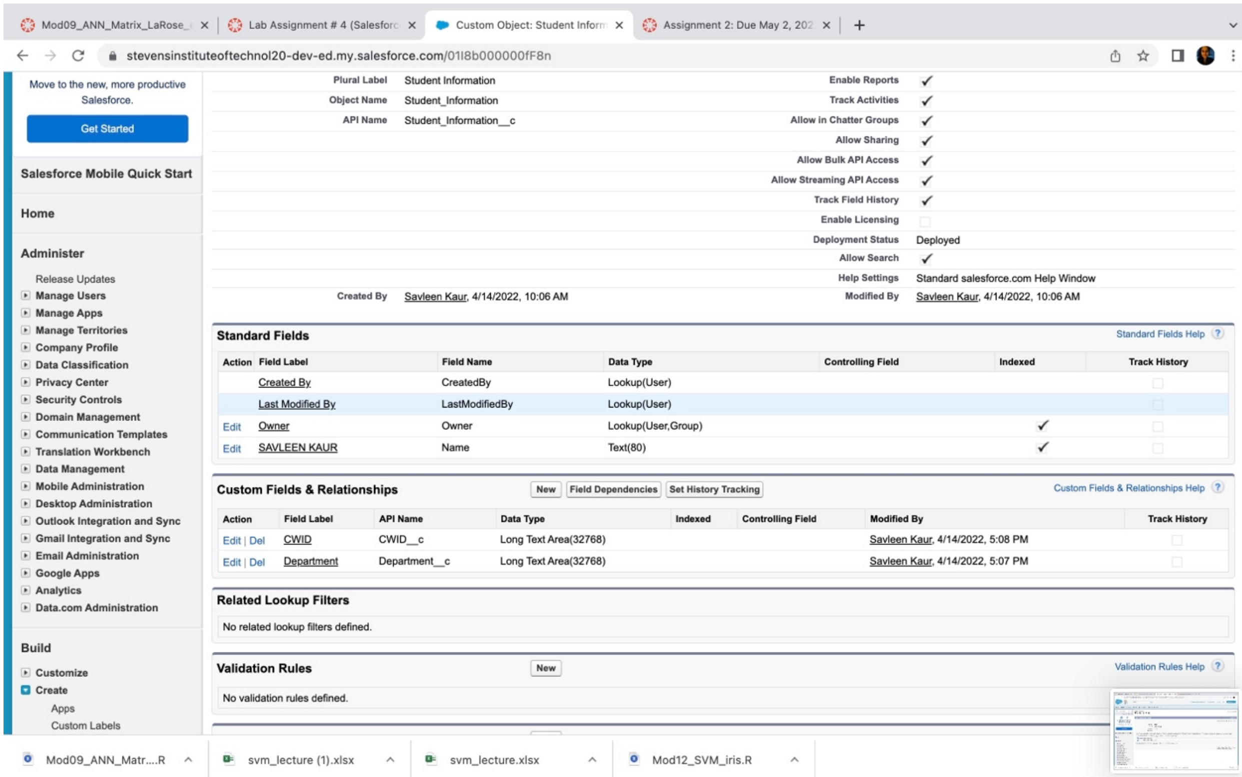
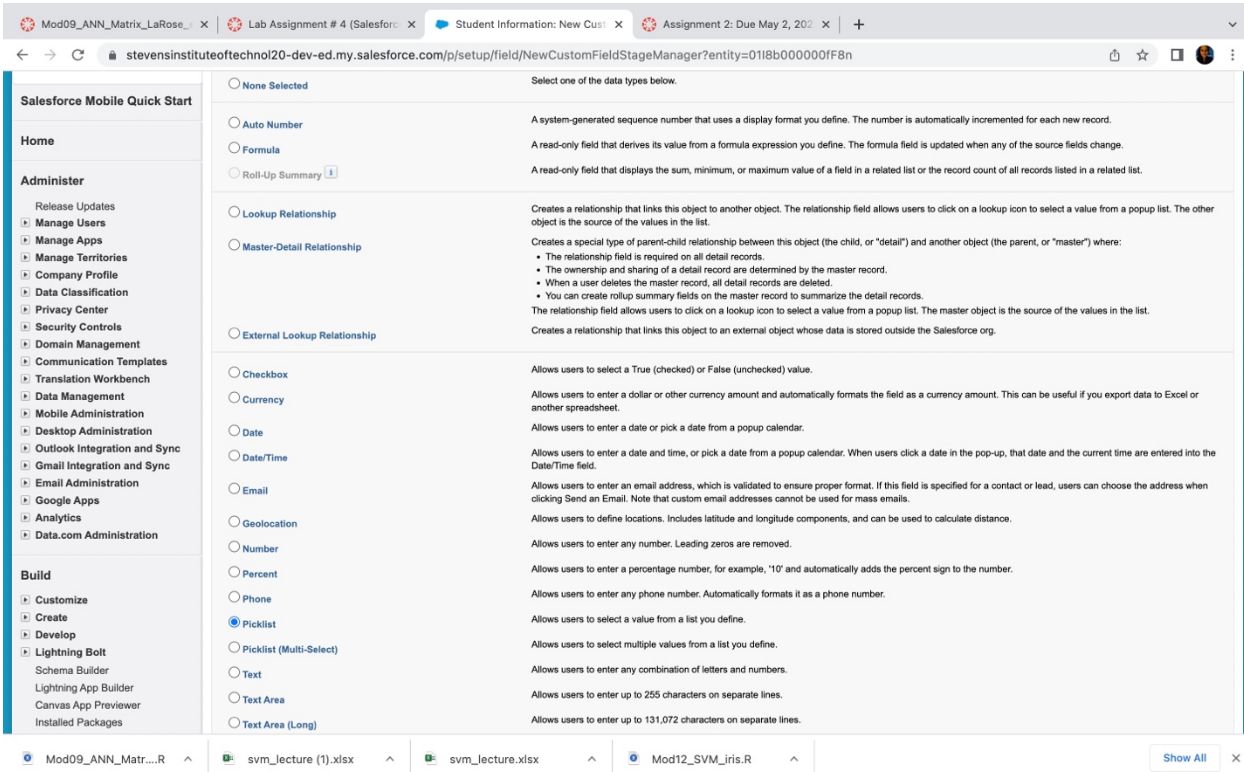
Domain Management
Communication Templates
Translation Workbench
Data Management
Mobile Administration
Student Information
New Custom Field
Help for this Page
Step 4. Add to page layouts
Step 4 of 4
Previous
Save & New
Save
Cancel
Field Label CWID
Data Type Long Text Area
Field Name CWID
Description
Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.
To change the location of this field on the page, you will need to customize the page layout.
Add Field
Page Layout Name
Student Information Layout
When finished, click Save & New to create more custom fields, or click Save if you are done.
Mod09_ANN_Matr....R
svm_lecture (1).xlsx
svm_lecture.xlsx
Mod12_SVM_iris.R
Show All



For third Custom field, give the following details:

Semester
Field Type: Picklist
Field Label: Semester
Values: Click on Enter values, with each value separated by a new line and enter following values - Fall, Spring, Summer (All these values need to be on separate line)
Field Name: Semester
Visible: Checked
Add to page layouts: Student Information Layout Checked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Salesforce Mobile Quick Start
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Communication Templates
Translation Workbench
Data Management
Mobile Administration
Desktop Administration
Outlook Integration and Sync
Gmail Integration and Sync
Email Administration
Google Apps
Analytics
Data.com Administration
Build
Customize
Create
Develop
Lightning Bolt
Schema Builder
Lightning App Builder
Canvas App Previewer
Installed Packages
None Selected
Select one of the data types below.
Auto Number
A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
Formula
A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
Roll-Up Summary
A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
Lookup Relationship
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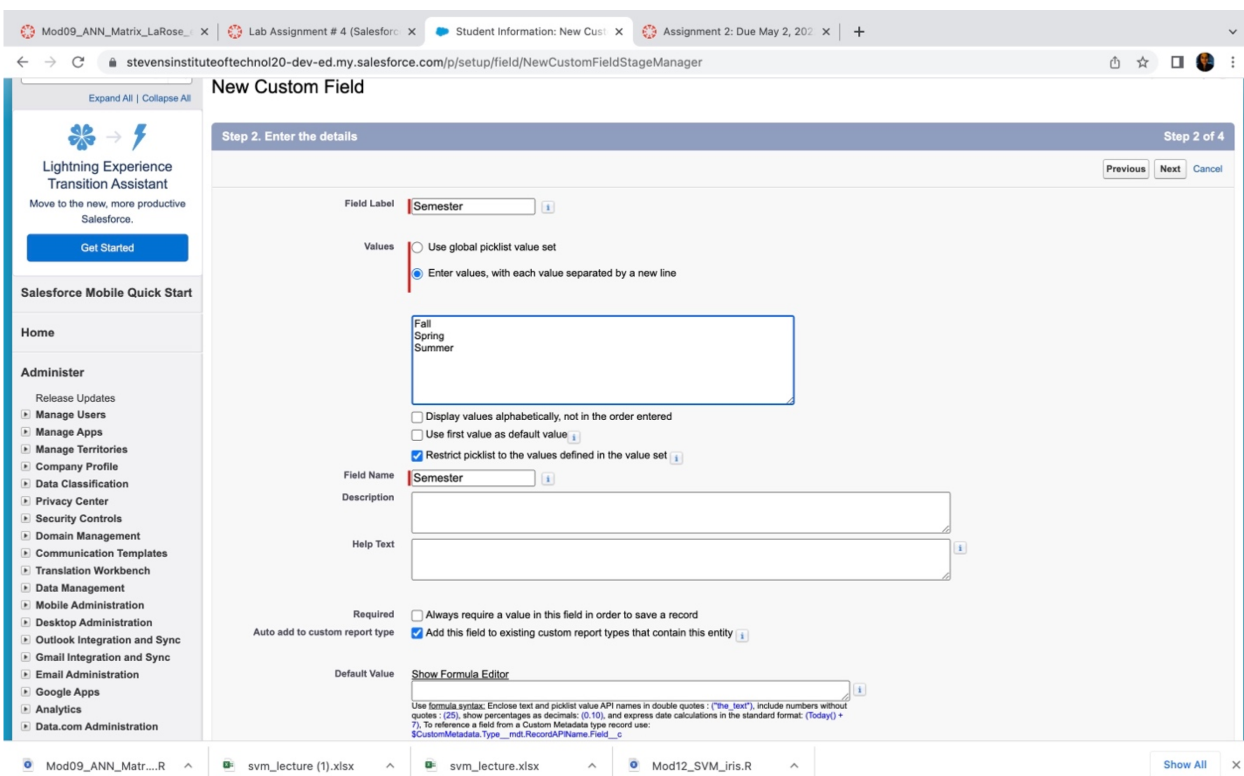
Currency
Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
Date
Allows users to enter a date or pick a date from a popup calendar.
Date/Time
Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
Email
Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
Geolocation
Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
Number
Allows users to enter any number. Leading zeros are removed.
Percent
Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.
Phone
Allows users to enter any phone number. Automatically formats it as a phone number.
Picklist
Allows users to select a value from a list you define.
Picklist (Multi-Select)
Allows users to select multiple values from a list you define.
Text
Allows users to enter any combination of letters and numbers.
Text Area
Allows users to enter up to 255 characters on separate lines.
Text Area (Long)
Allows users to enter up to 131,072 characters on separate lines.
Mod09_ANN_Matr....R
svm_lecture (1).xlsx
svm_lecture.xlsx
Mod12_SVM_iris.R
Show All


Mod09_ANN_Matrix_LaRose
Lab Assignment # 4 (Salesforc
Student Information: New Cust
Assignment 2: Due May 2, 202
stevensinstituteoftechnol20-dev-ed.my.salesforce.com/p/setup/field/NewCustomFieldStageManager
Expand All | Collapse All
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Gmail Integration and Sync
Email Administration
Google Apps
Analytics
Data.com Administration
New Custom Field
Step 2. Enter the details
Step 2 of 4
Previous
Next
Cancel
Field Label
Semester
Values
Use global picklist value set
Enter values, with each value separated by a new line
Fall
Spring
Summer
Display values alphabetically, not in the order entered
Use first value as default value
Restrict picklist to the values defined in the value set
Field Name
Semester
Description
Help Text
Required
Always require a value in this field in order to save a record
Auto add to custom report type
Add this field to existing custom report types that contain this entity
Default Value
Show Formula Editor
Use formula syntax: Enclose text and picklist value API names in double quotes : ("the_text"), include numbers without quotes : (25), show percentages as decimals: (0.10), and express date calculations in the standard format: (Today() + 7). To reference a field from a Custom Metadata type record use: $CustomMetadata.Type__mdt.RecordAPIName.Field__c
Mod09_ANN_Matr....R
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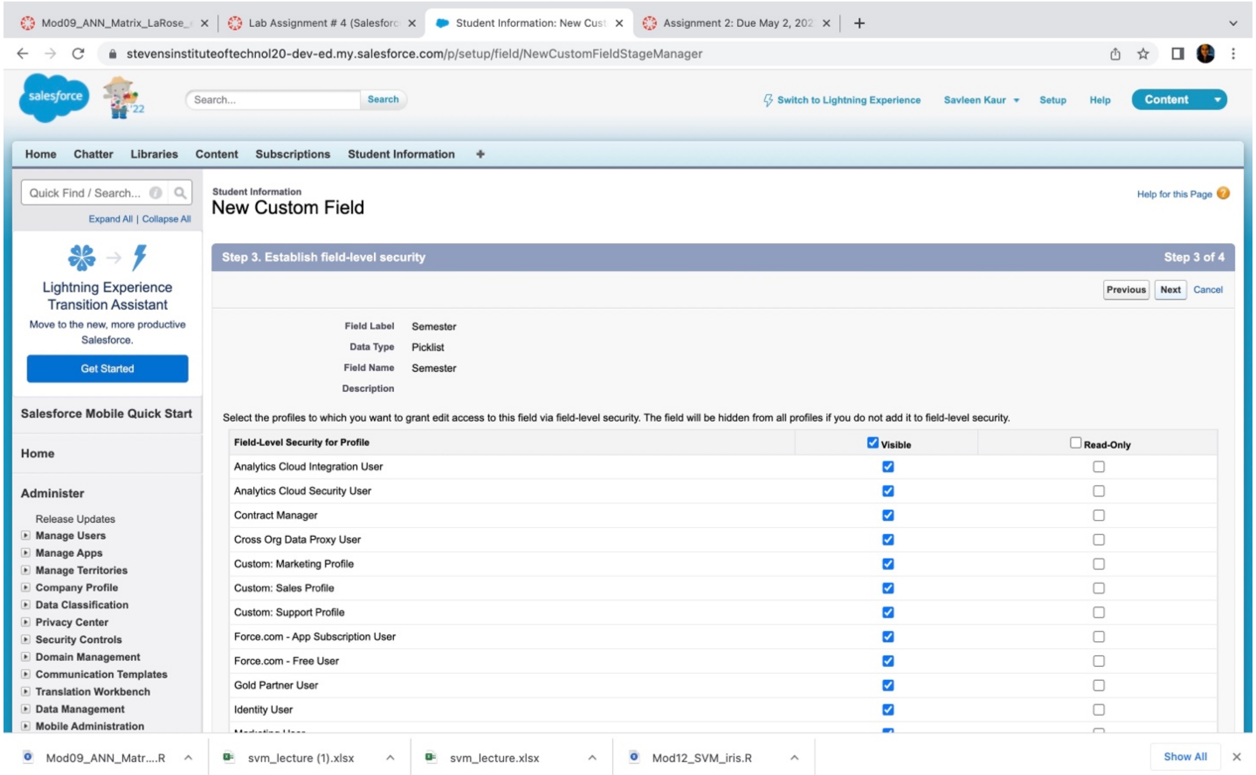
svm_lecture.xlsx
Mod12_SVM_iris.R
Show All


Mod09_ANN_Matrix_LaRose_
Lab Assignment # 4 (Salesforc
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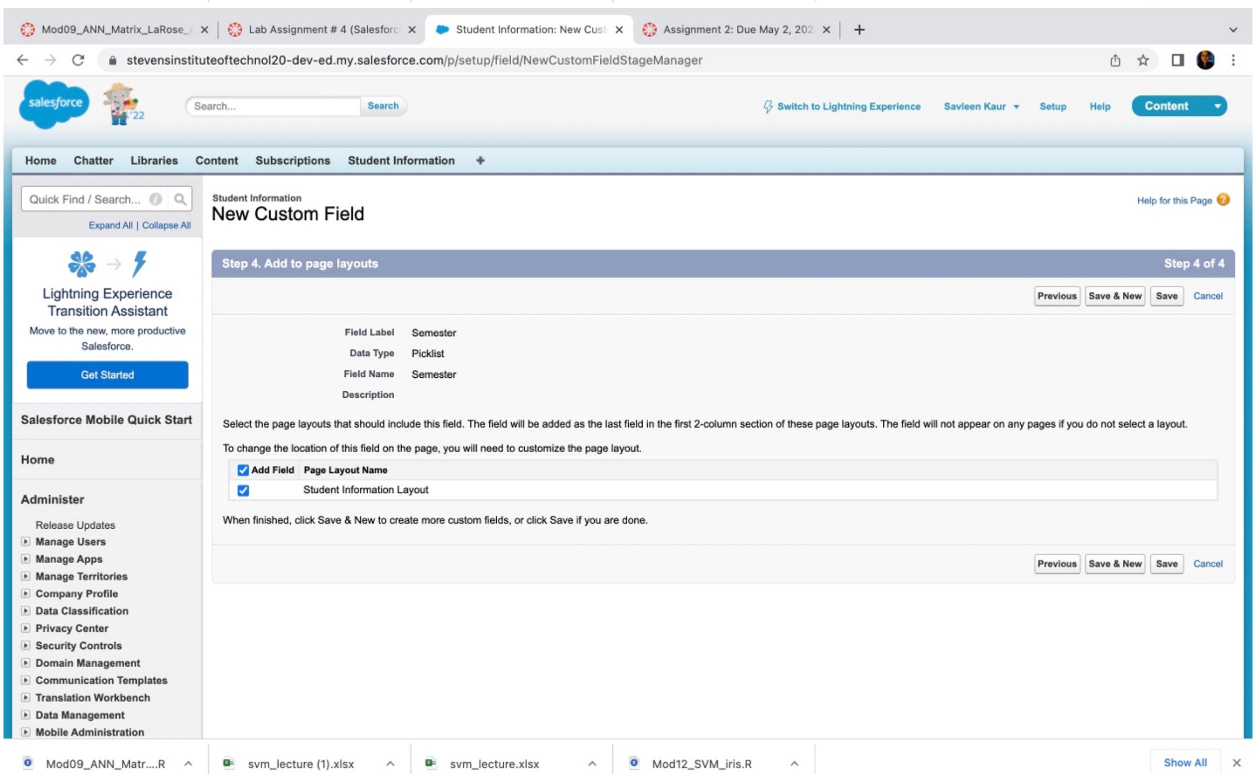
New Custom Field
Help for this Page
Step 3. Establish field-level security
Step 3 of 4
Previous
Next
Cancel
Field Label Semester
Data Type Picklist
Field Name Semester
Description
Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.
Field-Level Security for Profile
Visible
Read-Only
Analytics Cloud Integration User
Analytics Cloud Security User
Contract Manager
Cross Org Data Proxy User
Custom: Marketing Profile
Custom: Sales Profile
Custom: Support Profile
Force.com - App Subscription User
Force.com - Free User
Gold Partner User
Identity User
Mod09_ANN_Matr....R
svm_lecture (1).xlsx
svm_lecture.xlsx
Mod12_SVM_iris.R
Show All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New Custom Field
Help for this Page
Step 4. Add to page layouts
Step 4 of 4
Previous
Save & New
Save
Cancel
Field Label Semester
Data Type Picklist
Field Name Semester
Description
Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.
To change the location of this field on the page, you will need to customize the page layout.
Add Field
Page Layout Name
Student Information Layout
When finished, click Save & New to create more custom fields, or click Save if you are done.
Previous
Save & New
Save
Cancel
Mod09_ANN_Matr....R
svm_lecture (1).xlsx
svm_lecture.xlsx
Mod12_SVM_iris.R
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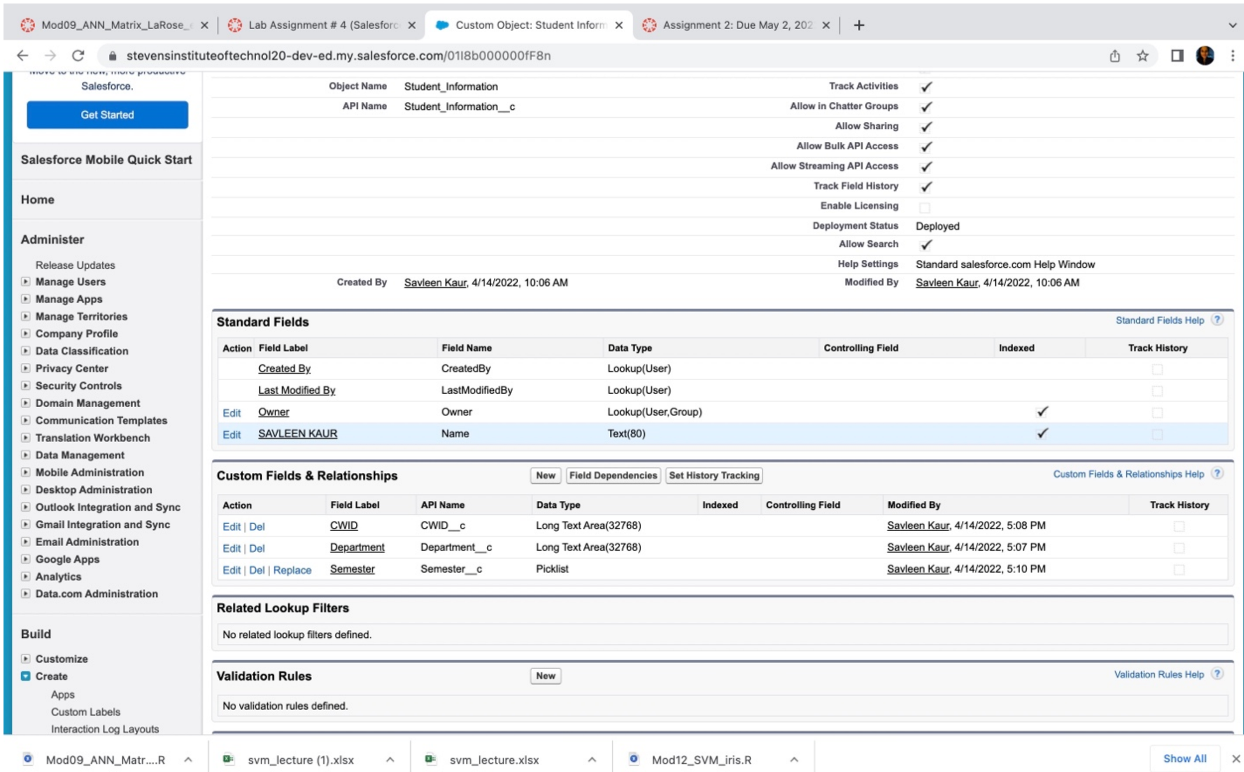
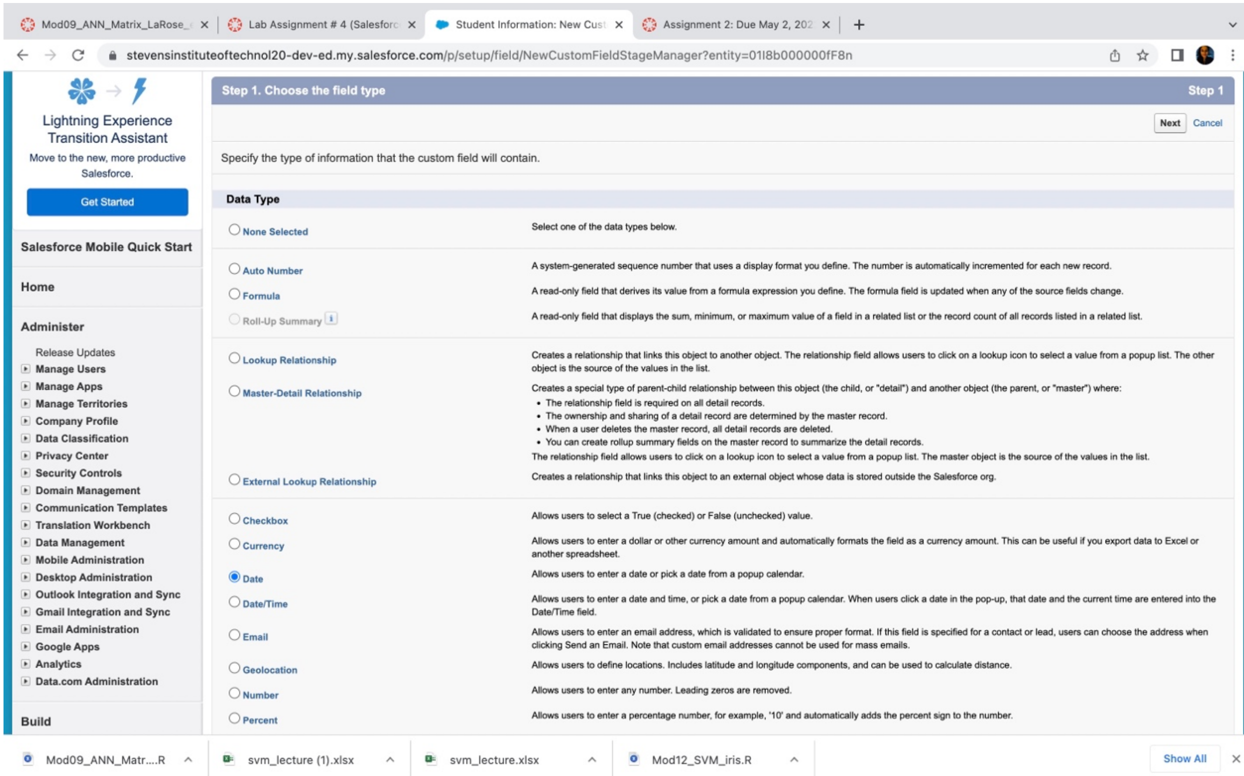


For fourth custom field, give the following values:

Date of Joining
Field Type: Date
Field Label: Date of Joining
Field Name: Date of Joining
Visible: Checked
Add to page layouts: Student Information Layout Checked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Outlook Integration and Sync
Gmail Integration and Sync
Email Administration
Google Apps
Analytics
Data.com Administration
Build
Step 1. Choose the field type
Step 1
Next
Cancel
Specify the type of information that the custom field will contain.
Data Type
None Selected
Select one of the data types below.
Auto Number
A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
Formula
A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
Roll-Up Summary
A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
Lookup Relationship
Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
Master-Detail Relationship
Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:
The relationship field is required on all detail records.
The ownership and sharing of a detail record are determined by the master record.
When a user deletes the master record, all detail records are deleted.
You can create rollup summary fields on the master record to summarize the detail records.
The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.
External Lookup Relationship
Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.
Checkbox
Allows users to select a True (checked) or False (unchecked) value.
Currency
Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
Date
Allows users to enter a date or pick a date from a popup calendar.
Date/Time
Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
Email
Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
Geolocation
Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
Number
Allows users to enter any number. Leading zeros are removed.
Percent
Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.
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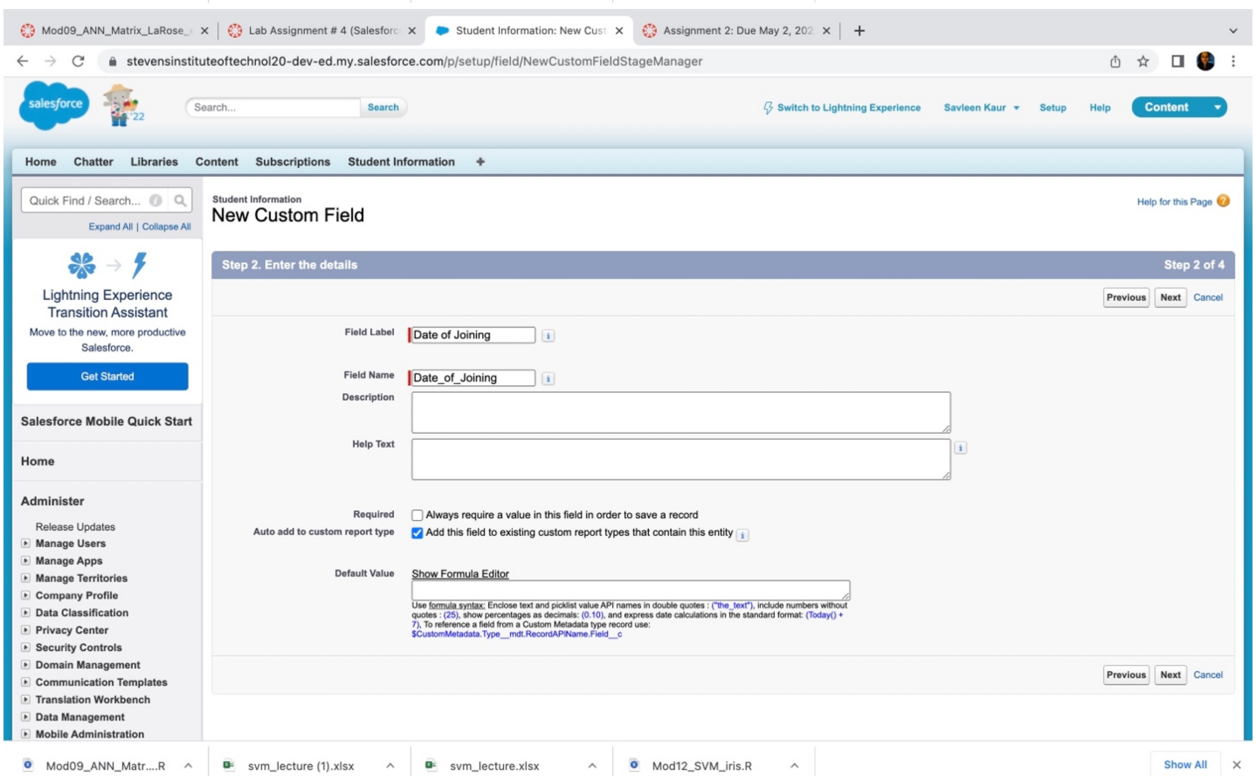
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Lab Assignment # 4 (Salesforc
Student Information: New Cust
Assignment 2: Due May 2, 202
stevensinstituteoftechnol20-dev-ed.my.salesforce.com/p/setup/field/NewCustomFieldStageManager
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Help for this Page
Step 2. Enter the details
Step 2 of 4
Previous
Next
Cancel
Field Label
Date of Joining
Field Name
Date_of_Joining
Description
Help Text
Required
Always require a value in this field in order to save a record
Auto add to custom report type
Add this field to existing custom report types that contain this entity
Default Value
Show Formula Editor
Use formula syntax: Enclose text and picklist value API names in double quotes : ("the_text"), include numbers without quotes : (25), show percentages as decimals: (0.10), and express date calculations in the standard format: (Today() + 7). To reference a field from a Custom Metadata type record use: $CustomMetadata.Type__mdt.RecordAPIName.Field__c
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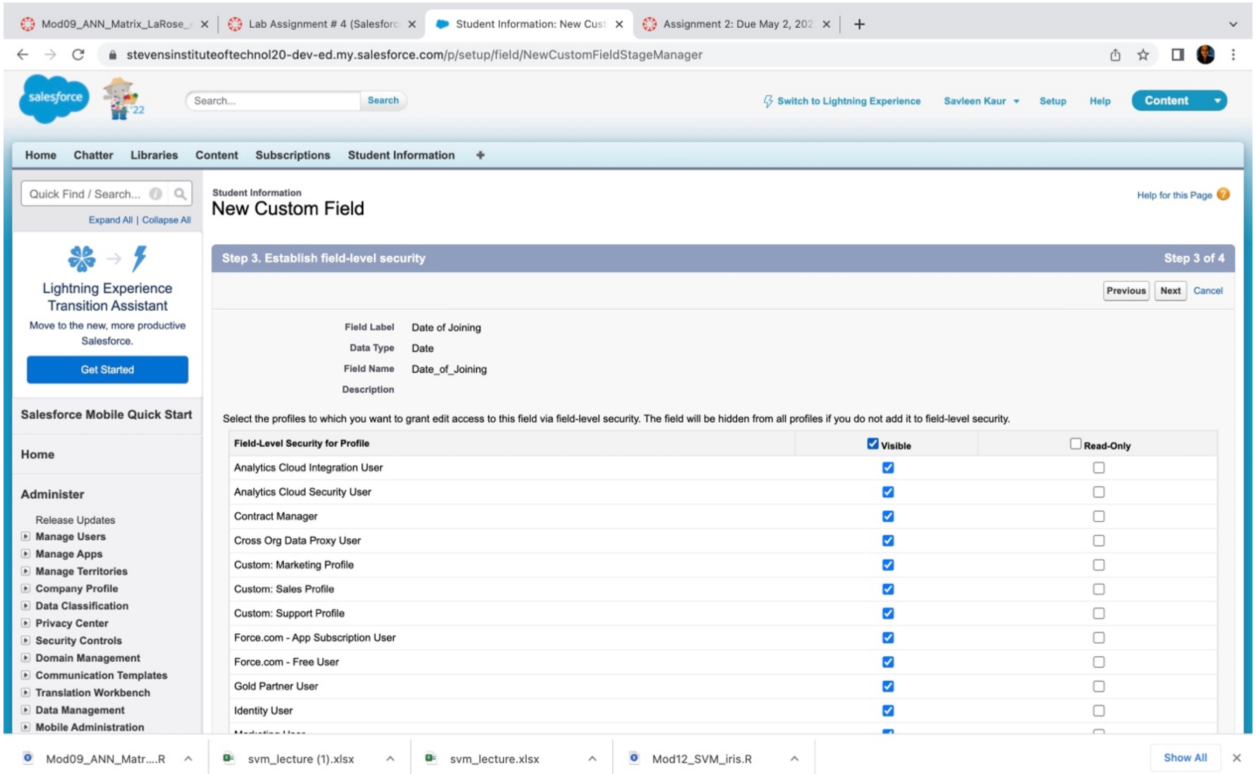
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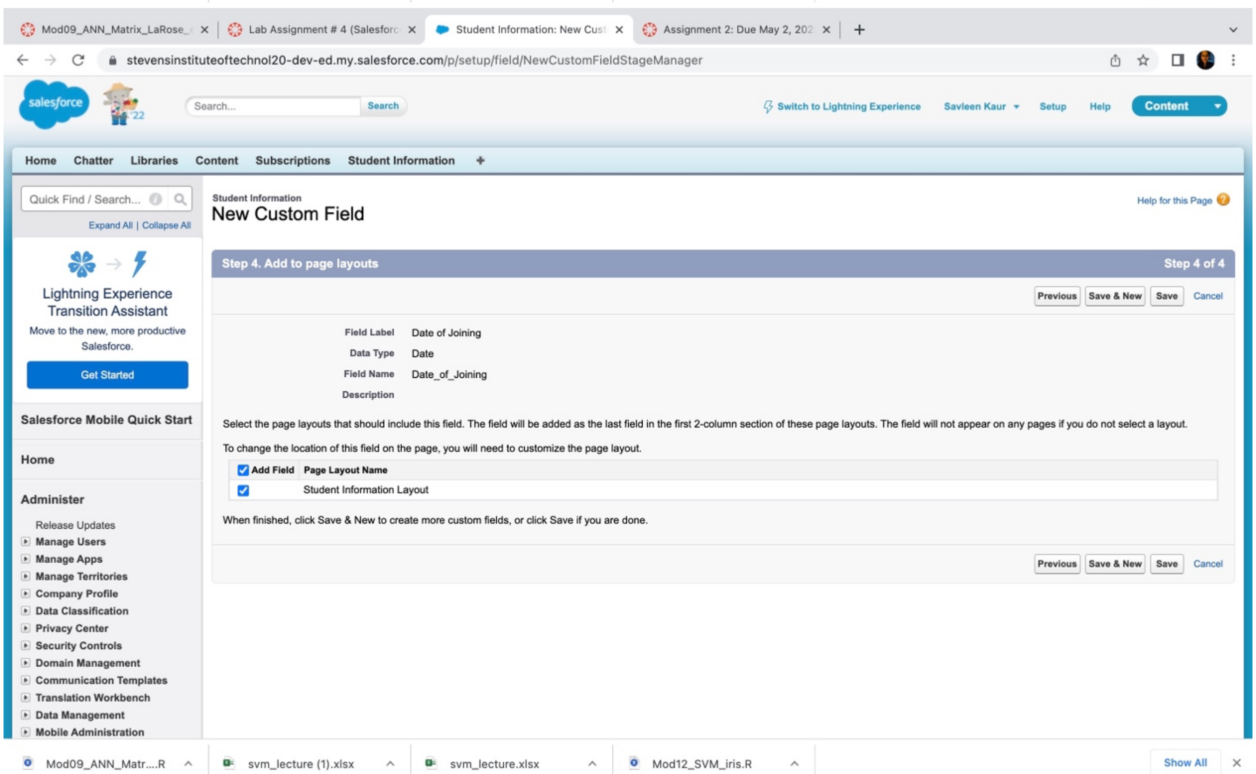
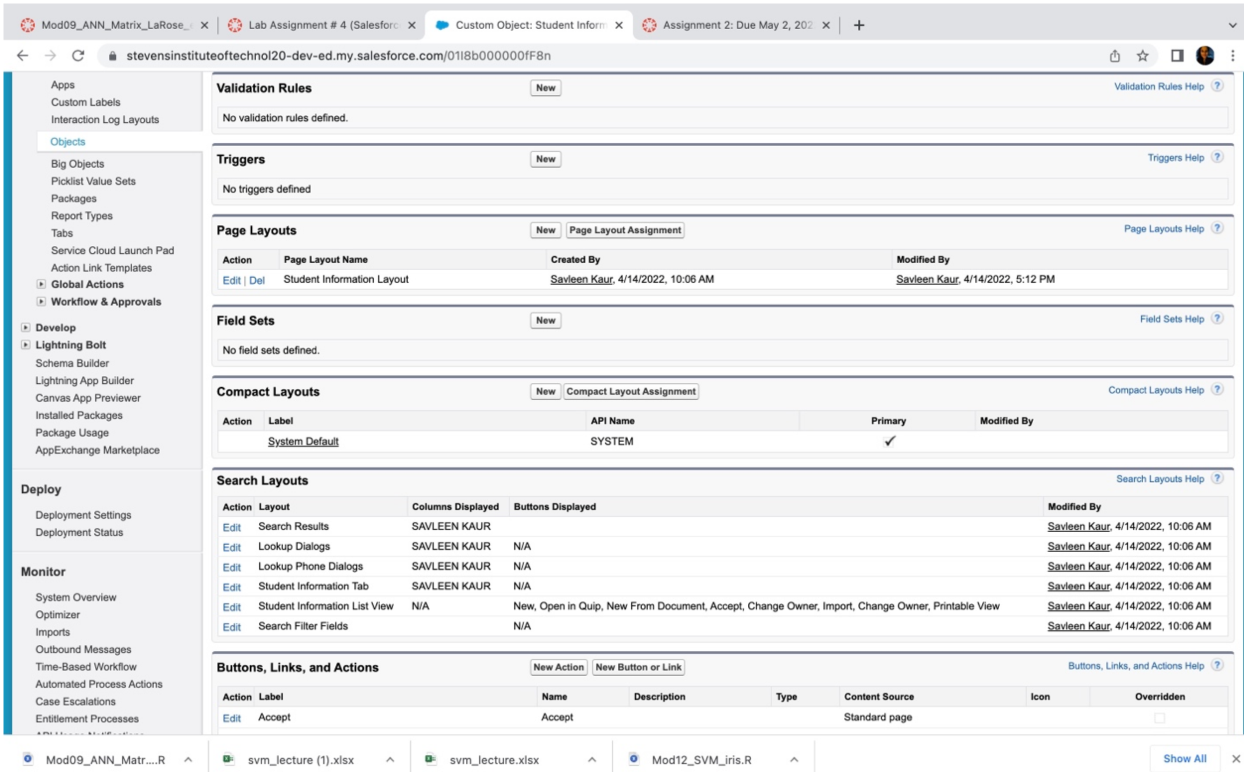
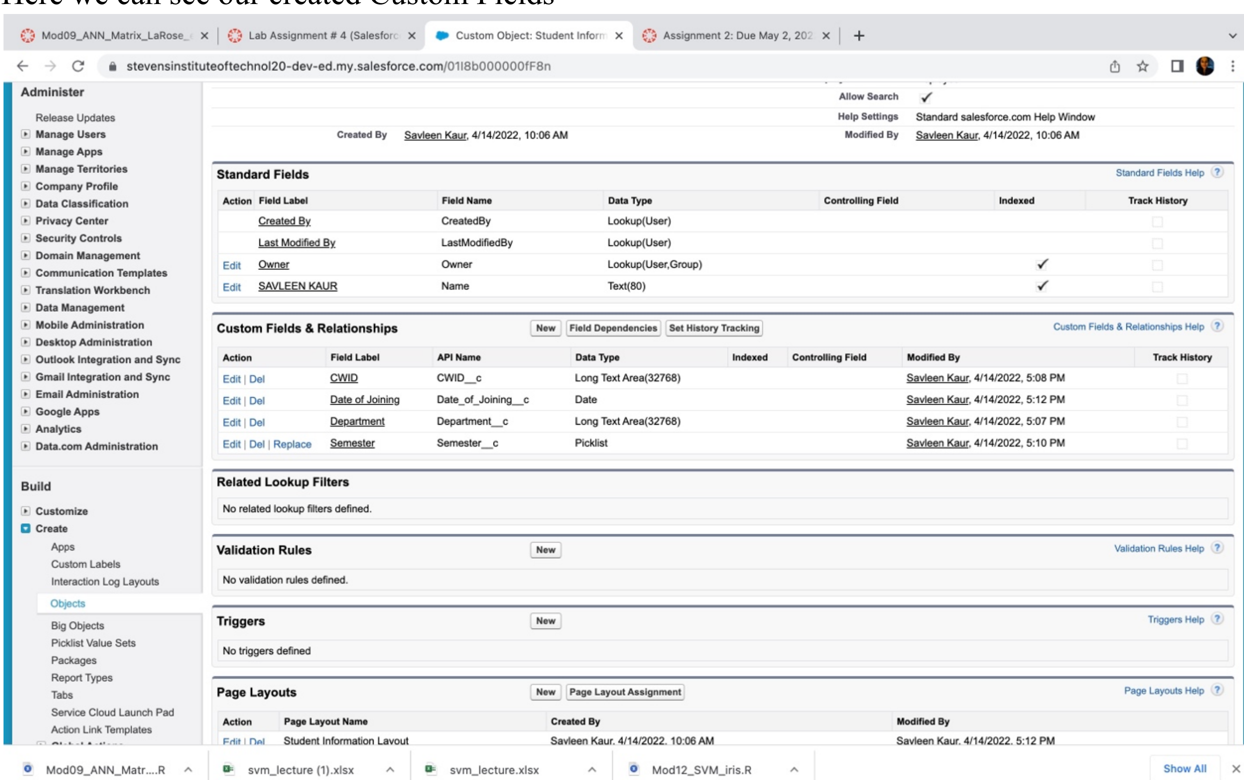
Home Chatter Libraries Content Subscriptions Student Information
Student Information
New Custom Field
Step 3. Establish field-level security
Step 3 of 4
Previous Next Cancel
Field Label Date of Joining
Data Type Date
Field Name Date_of_Joining
Description
Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.
Field-Level Security for Profile
Visible
Read-Only
Analytics Cloud Integration User
Analytics Cloud Security User
Contract Manager
Cross Org Data Proxy User
Custom: Marketing Profile
Custom: Sales Profile
Custom: Support Profile
Force.com - App Subscription User
Force.com - Free User
Gold Partner User
Identity User


stevensinstituteoftechnol20-dev-ed.my.salesforce.com/p/setup/field/NewCustomFieldStageManager
Home Chatter Libraries Content Subscriptions Student Information
Student Information
New Custom Field
Step 4. Add to page layouts
Step 4 of 4
Previous Save & New Save Cancel
Field Label Date of Joining
Data Type Date
Field Name Date_of_Joining
Description
Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.
To change the location of this field on the page, you will need to customize the page layout.
Add Field Page Layout Name
Student Information Layout
When finished, click Save & New to create more custom fields, or click Save if you are done.
Previous Save & New Save Cancel

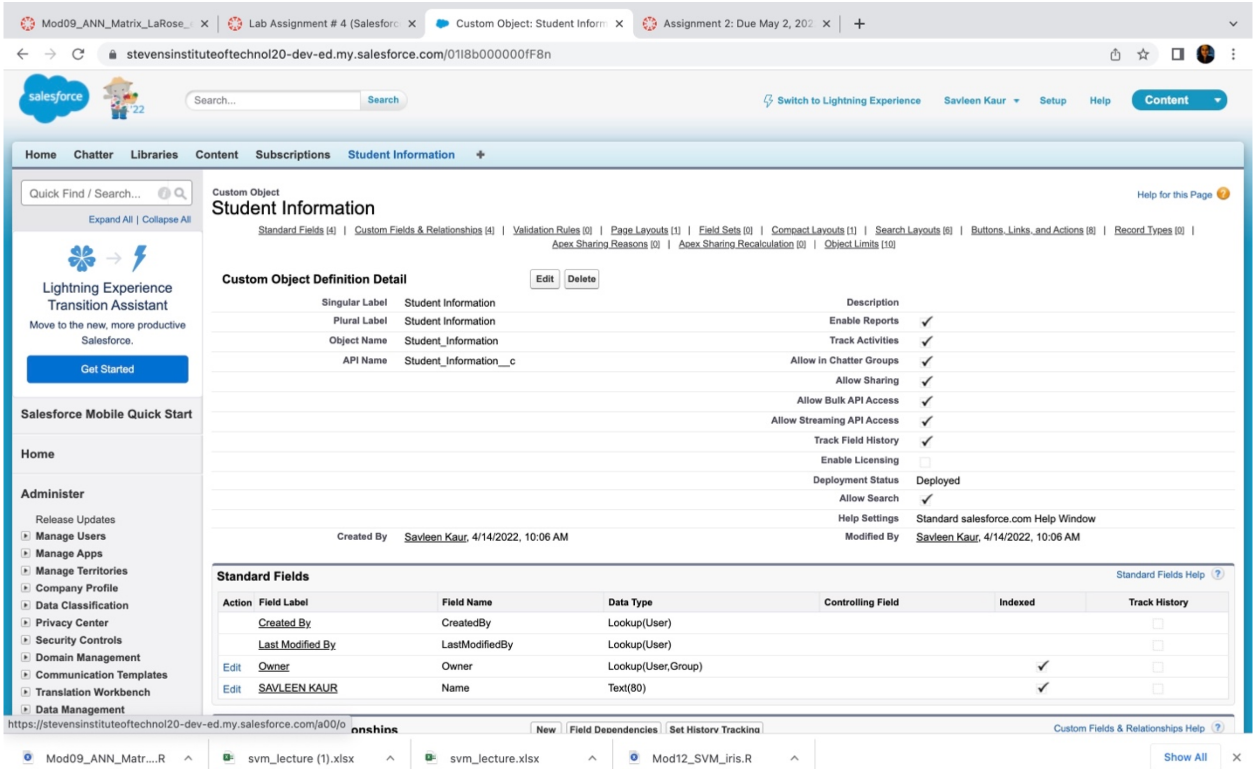


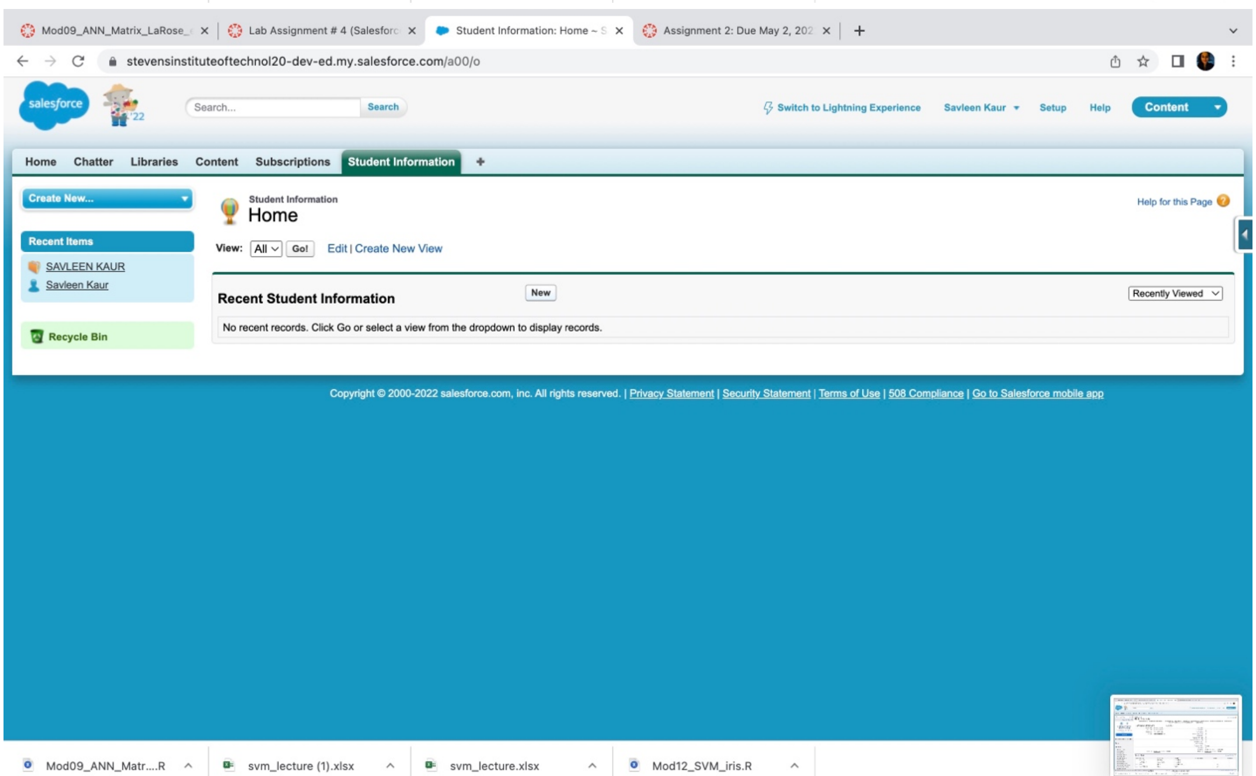
Here we can see our created Custom Fields



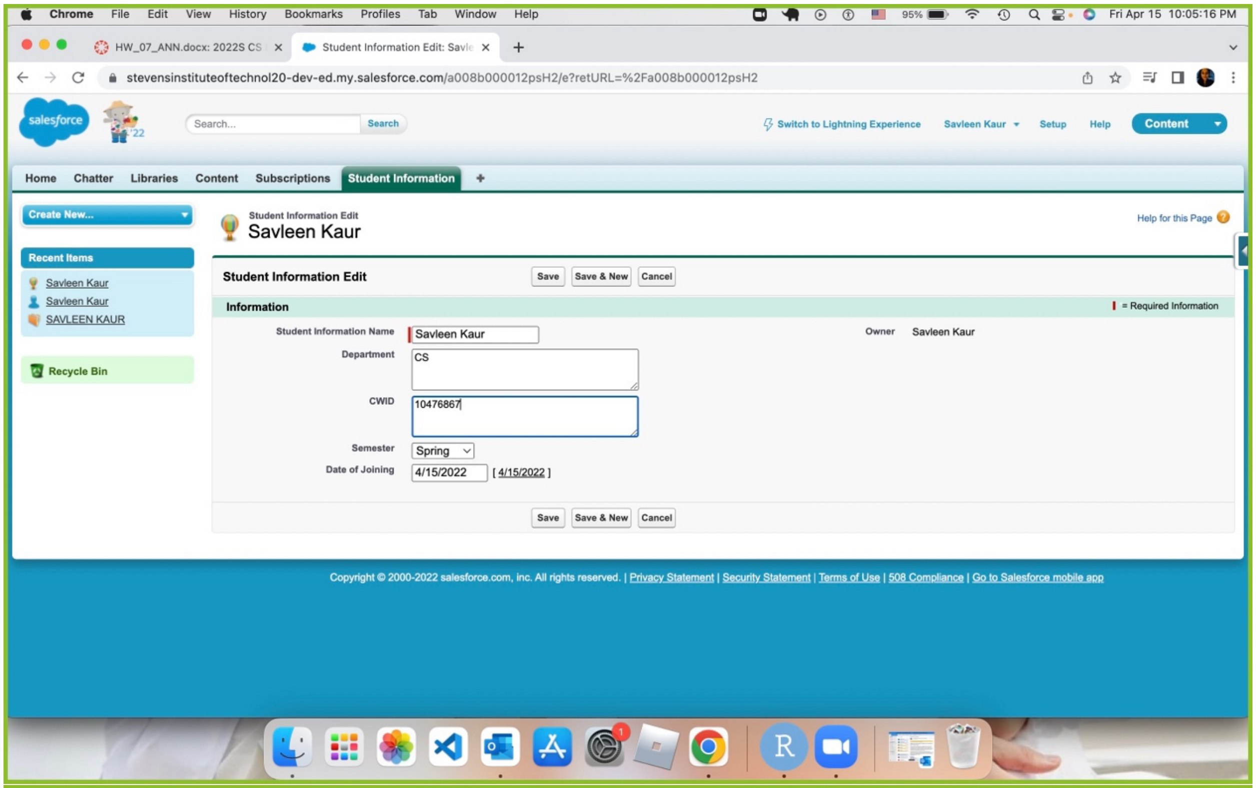
Creating record on Custom Object

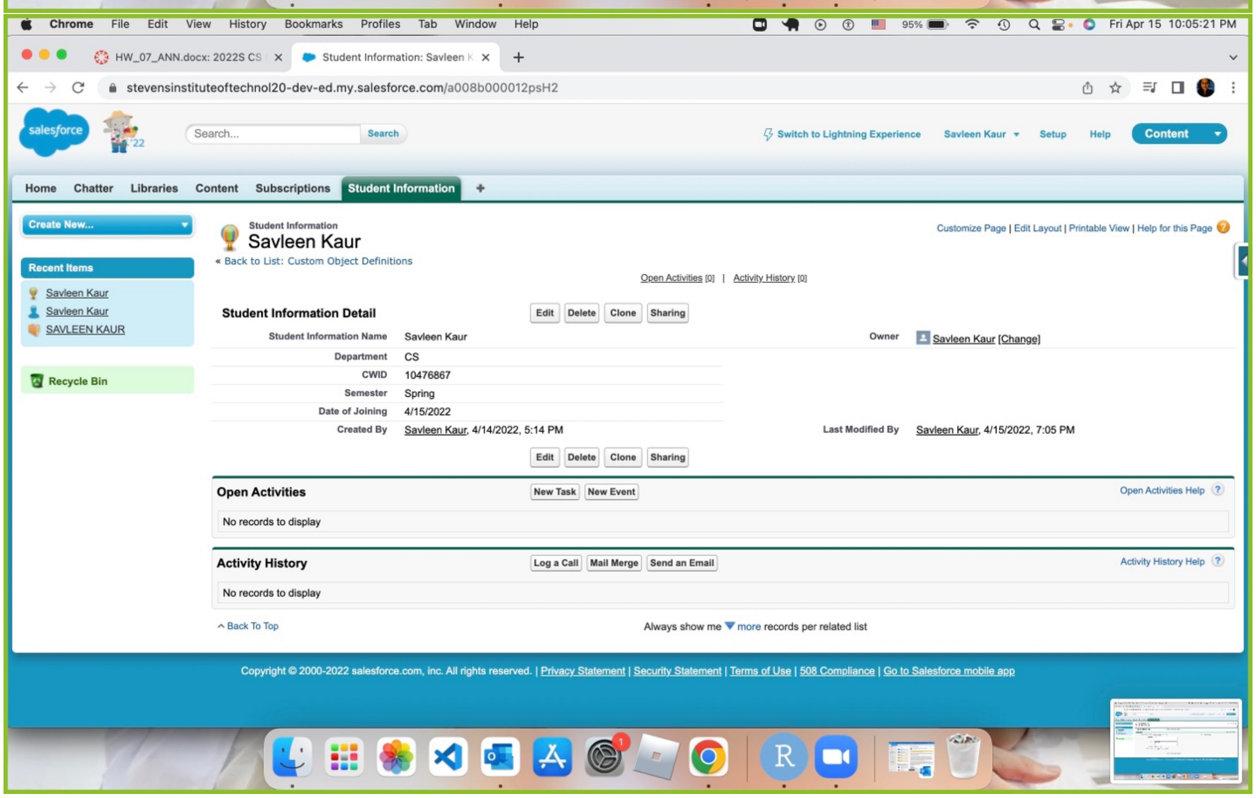
Goto + tab and click on New





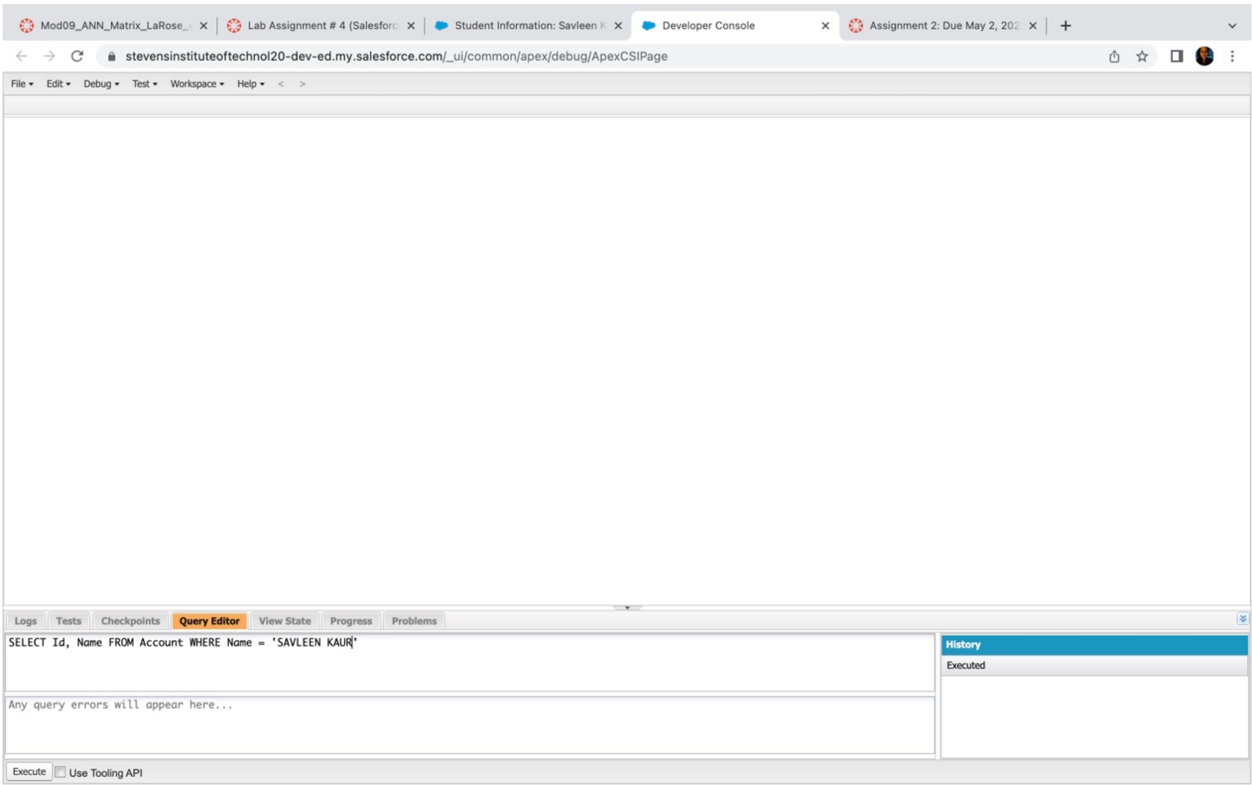
Provide the name and click on Save



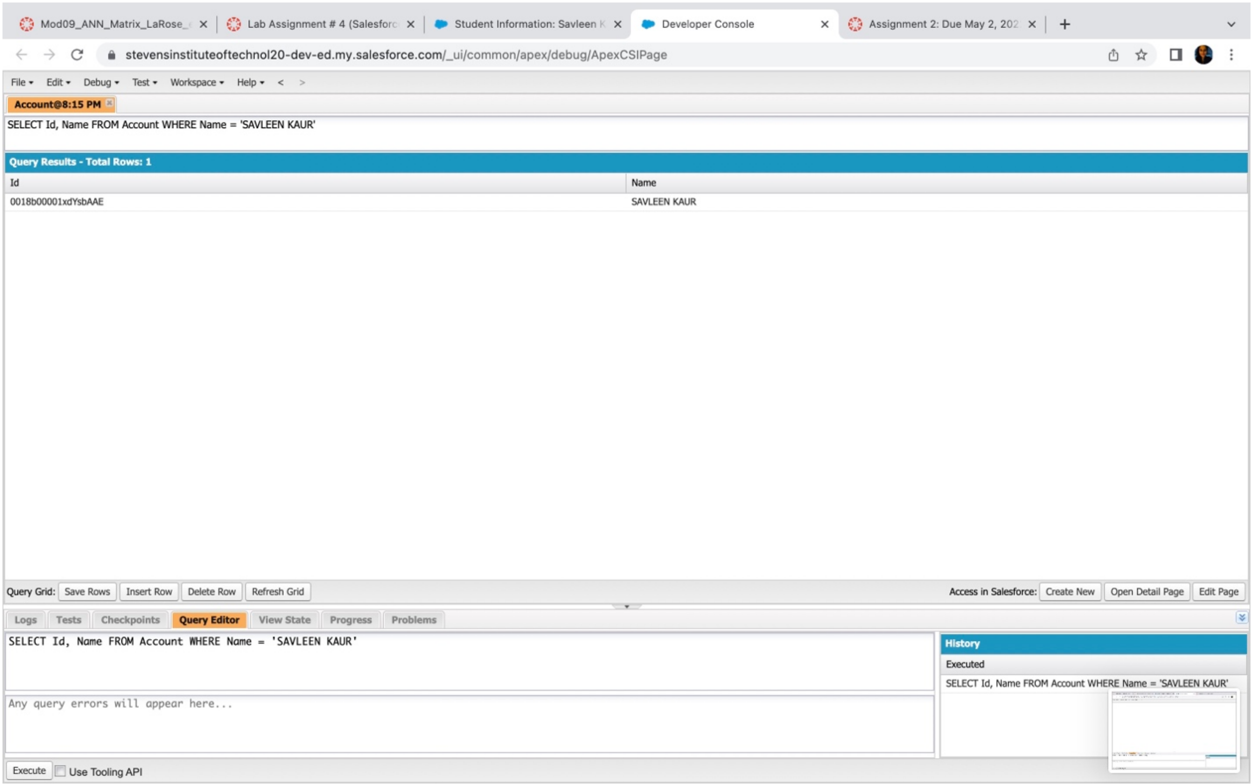


Goto Developer Console by going to the name->dropdown

Run the query to check the output and click on execute- SELECT Id, Name FROM Account WHERE Name = SAVLEEN KAUR'



Details are seen as follows:


Mod09_ANN_Matrix_LaRose_
Lab Assignment # 4 (Salesforc
Student Information: Savleen K
Developer Console
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stevensinstituteoftechnol20-dev-ed.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage
File Edit Debug Test Workspace Help < >
Account@8:15 PM
SELECT Id, Name FROM Account WHERE Name = 'SAVLEEN KAUR'
Query Results - Total Rows: 1
Id
Name
0018b00001xdYsbAAE
SAVLEEN KAUR
Query Grid: Save Rows Insert Row Delete Row Refresh Grid
Access in Salesforce: Create New Open Detail Page Edit Page
Logs Tests Checkpoints Query Editor View State Progress Problems
SELECT Id, Name FROM Account WHERE Name = 'SAVLEEN KAUR'
Any query errors will appear here...
History
Executed
SELECT Id, Name FROM Account WHERE Name = 'SAVLEEN KAUR'
Execute
Use Tooling API

Run the second query and click on execute:

SELECT Id, Name FROM Student_Information__c WHERE Name = 'SAVLEEN KAUR'