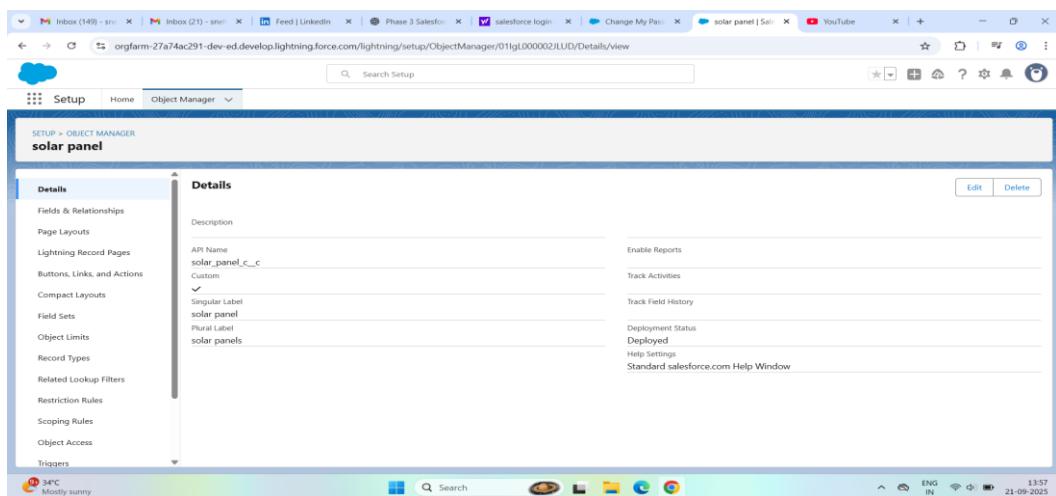


## Step 1 — Create the Solar Panel & Energy Record objects

### A. Create Solar Panel (custom object)

1. Click  → **Setup**.
2. In the **Quick Find** box type **Object Manager** → click **Object Manager**.
3. Click **Create** → **Custom Object** (or **New Custom Object**).
4. Fill fields:
  - **Label:** Solar Panel
  - **Plural Label:** Solar Panels
  - **Object Name:** Solar\_Panel (auto)
  - **Record Name:** choose **Text**, Label it **Serial Number** (so you can type SP-001 etc.)
  - Check **Allow Reports, Track Activities** (optional but handy).
  - Optionally check **Allow Search, Allow in App Launcher**.
5. Click **Save**.



### B. Create Energy Record (custom object)

1. From **Object Manager** click **Create** → **Custom Object** again.
2. Fill:
  - **Label:** Energy Record
  - **Plural:** Energy Records

- **Record Name:** choose **Auto Number**, set format ENR-{0000}.
- **Check Allow Reports, Track Activities.**

### 3. Click **Save**.

FIELD LABEL	API NAME	CREATED BY	MODIFIED BY	DESCRIPTION
Capacity	Capacity_c	Maddi Sneha, 9/21/2025, 1:41 AM	Maddi Sneha, 9/21/2025, 1:41 AM	5-10
customer	customer_c	Maddi Sneha, 9/21/2025, 1:42 AM	Maddi Sneha, 9/21/2025, 1:42 AM	Account
status	status_c	Maddi Sneha, 9/21/2025, 1:42 AM	Maddi Sneha, 9/21/2025, 1:42 AM	Active -Inactive

## Step 2 — Add the essential fields (Solar Panel + Energy Record)

For each field: after choosing the field type, click **Next** → **Set Field-Level Security** → **Add to Page Layout** → **Save**.

### Solar Panel fields (minimal required)

#### 1. Capacity (kW)

- Type: **Number** → Length: 5, Decimal Places: 2.
- Label: Capacity (kW).

#### 2. Status

- Type: **Picklist**.
- Label: Status.
- Values (enter each on new line):
  - Active
  - Inactive

- Maintenance

### 3. **Customer (lookup to Account)** — this creates the relationship

- Type: **Lookup Relationship** → Related To: **Account**.
- Field Label: Customer.
- Optional: set lookup dialog options (Make lookup required? leave optional for test).

### 4. (Optional) **Installation Date**

- Type: **Date** → Label: Installation Date.

## **Energy Record fields (minimal required)**

### 1. **Date**

- Type: **Date** → Label: Date.

### 2. **kWh**

- Type: **Number** → Length 8, Decimal 2. → Label: kWh.

### 3. **Type**

- Type: **Picklist** → Label: Type → Values:
- Production
- Consumption

### 4. **Solar Panel (lookup)**

- Type: **Lookup Relationship** → Related To: **Solar Panel**.
- Field Label: Solar Panel.

### 5. **Customer (lookup to Account)**

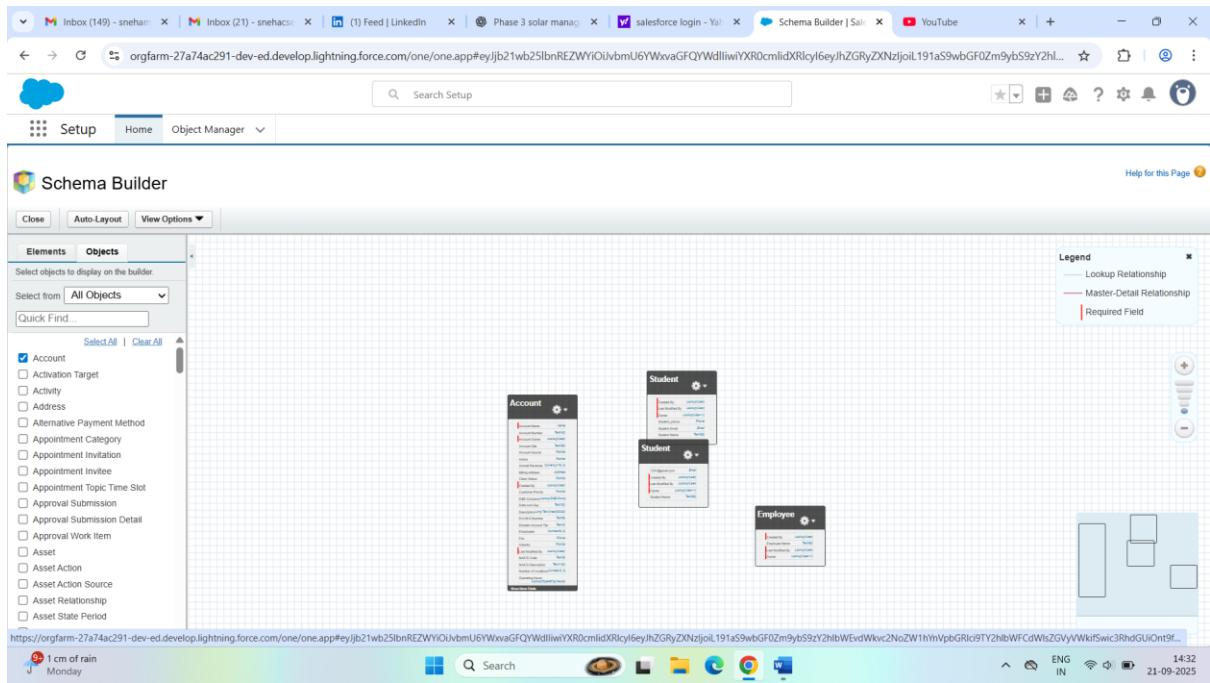
- Type: **Lookup Relationship** → Related To: **Account**.
- Field Label: Customer.
- field to layout.

FIELD LABEL	API NAME	CREATED BY	MODIFIED BY	DESCRIPTION
customer	customer	Maddi Sneha, 9/21/2025, 1:45 AM	Maddi Sneha, 9/21/2025, 1:45 AM	customers
Date	Date	Maddi Sneha, 9/21/2025, 1:44 AM	Maddi Sneha, 9/21/2025, 1:44 AM	date
Kwh	Kwh	Maddi Sneha, 9/21/2025, 1:44 AM	Maddi Sneha, 9/21/2025, 1:44 AM	kilometers
solar panel	solar_panel	Maddi Sneha, 9/21/2025, 1:46 AM	Maddi Sneha, 9/21/2025, 1:46 AM	checking
Type	Type	Maddi Sneha, 9/21/2025, 1:45 AM	Maddi Sneha, 9/21/2025, 1:45 AM	used for

## Step 3 — Relationships (confirm & tweak)

We used **Lookup** relationships in Step 2. Confirm and adjust behavior:

1. Go to **Object Manager** → **Solar Panel** → **Fields & Relationships**.
  - Confirm you see Customer (Lookup to Account). Click it to edit settings (make required or not).
2. Go to **Object Manager** → **Energy Record** → **Fields & Relationships**.
  - Confirm you see Solar Panel (Lookup to Solar Panel) and Customer (Lookup to Account).
3. (Optional) If you want **Energy Records** to be deleted when the Solar Panel is deleted, you could change to **Master-Detail** — but that requires the child (Energy Record) to have a master at creation time. For simplicity, leave as **Lookup**.
4. Visual check: **Setup** → **Schema Builder**
  - Open Schema Builder, add Account, Solar Panel, Energy Record and you'll see the lines showing the lookups.



## Step 4 — Page Layouts (simple & useful)

Make it easy for users to add and view related records.

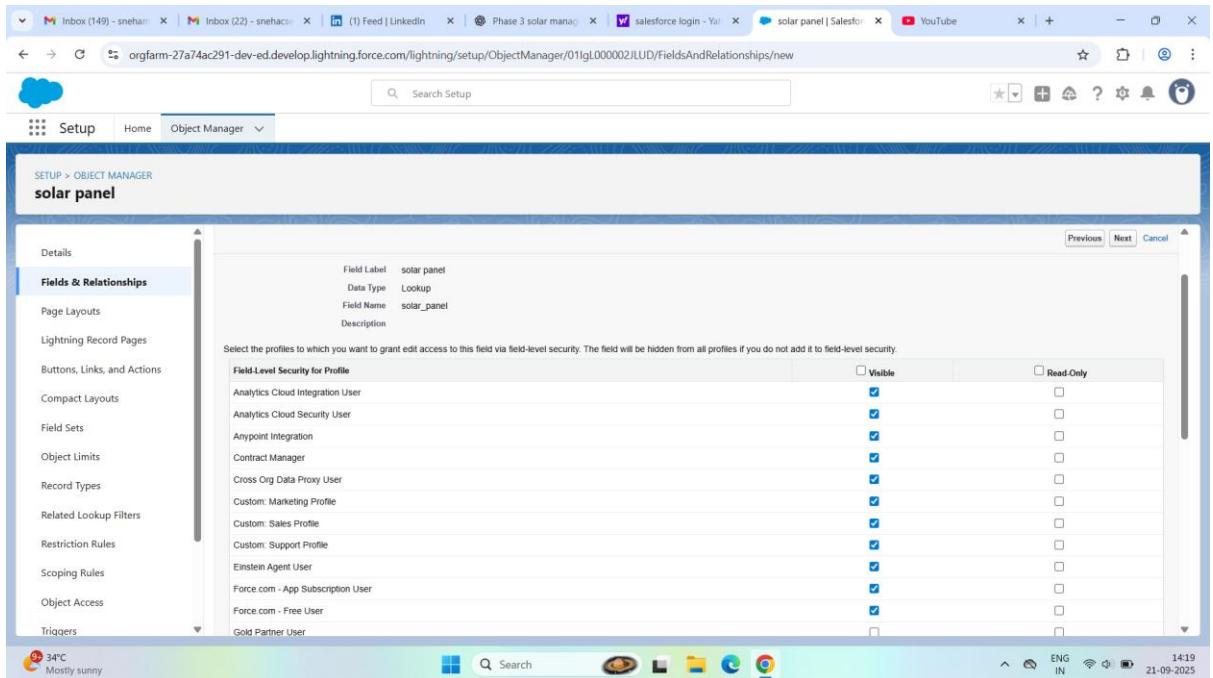
### A. Account (Customer) — add related lists

1. Setup → Object Manager → **Account** → **Page Layouts** → click the layout name (e.g., Account Layout) → **Edit**.
2. In the layout editor, find **Related Lists** on the right.
3. Drag **Solar Panels** into the Related Lists area.
4. Drag **Energy Records** into the Related Lists area.
5. Optional: click the **wrench** on a related list → choose visible **Columns**:
  - For Solar Panels: Serial Number, Capacity (kW), Status.
  - For Energy Records: Date, Type, kWh, Solar Panel.
6. Ensure **New** is present under Buttons so users can create records from the related list.
7. Click **Save**.

### B. Solar Panel — show core fields + related records

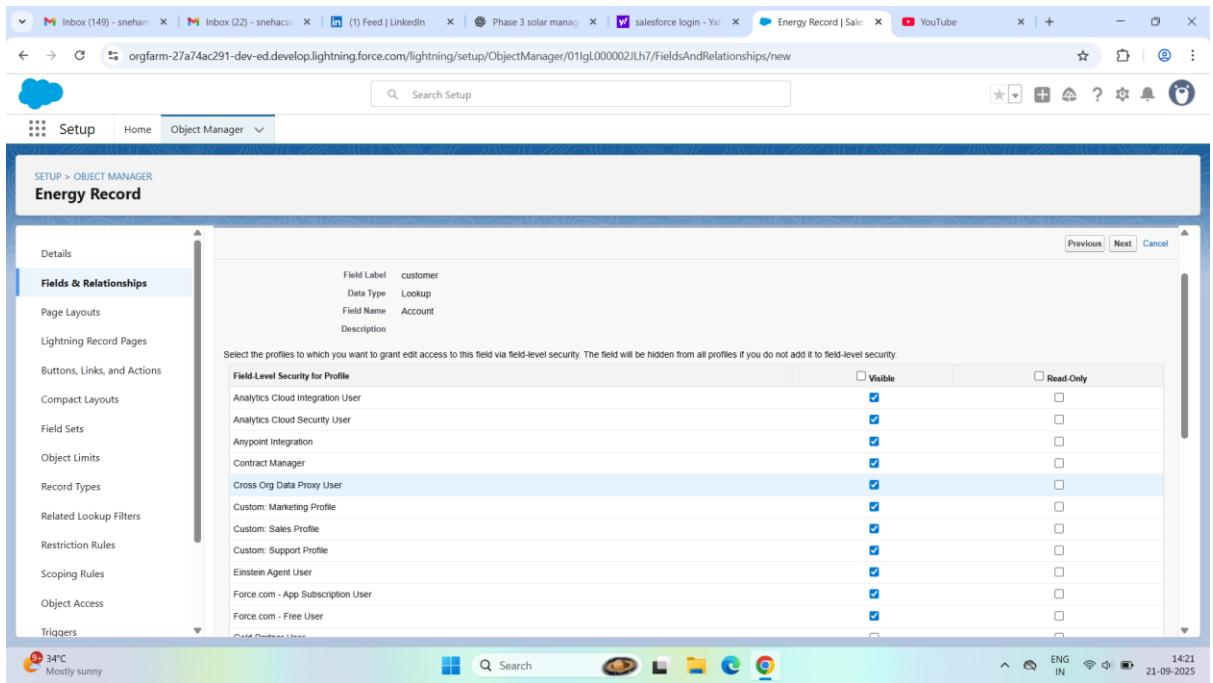
1. Object Manager → **Solar Panel** → **Page Layouts** → Edit the main layout.

2. Make sure these fields are present near the top: Serial Number, Capacity (kW), Status, Customer, Installation Date.
3. Drag **Energy Records** (related list) onto the page so you can see production/consumption from the panel.
4. Optionally configure the related list columns (wrench) to show Date, Type, kWh.
5. Save.



## C. Energy Record — tidy form for data entry

1. Object Manager → **Energy Record** → Page Layouts → Edit.
2. Put fields in a logical order: **Date, Type, kWh, Solar Panel, Customer, Notes**.
3. Save.



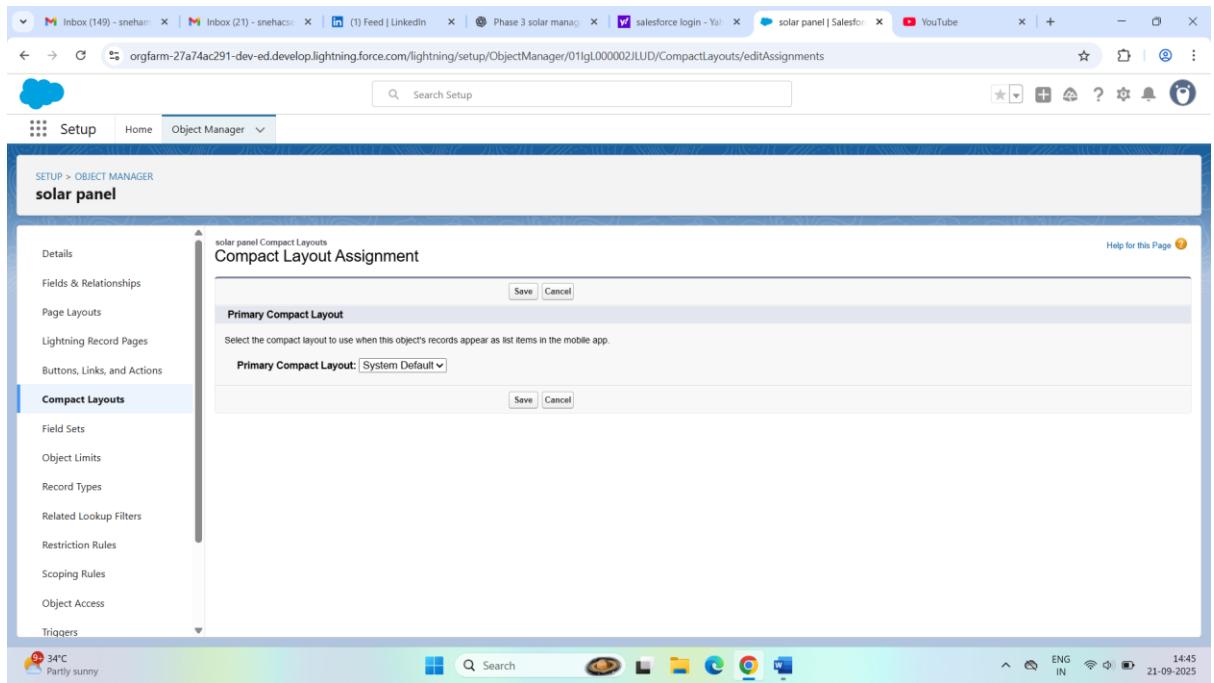
4.

## Step 5 — Compact Layouts (so key info shows in top card & mobile)

Compact layouts control the record summary that appears at the top of record pages and on mobile.

### Solar Panel compact layout

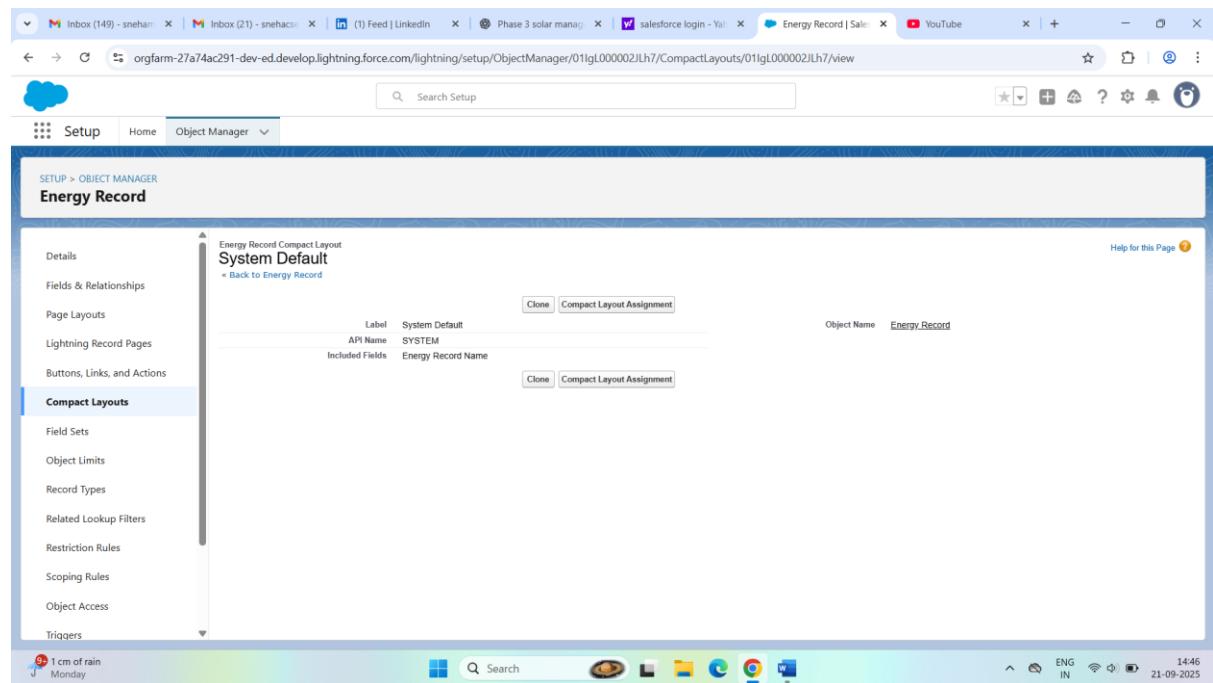
1. Setup → Object Manager → **Solar Panel** → **Compact Layouts** → New.
  - Name: Solar Panel Compact.
  - Select fields (order matters): Serial Number, Capacity (kW), Status, Customer.
2. Save.
3. Click **Compact Layout Assignment** → **Edit Assignment** → Set Solar Panel Compact as the Primary Layout → Save.



4.

## Energy Record compact layout

1. Object Manager → Energy Record → Compact Layouts → New.
  - Name: Energy Record Compact.
  - Fields: Date, Type, kWh, Solar Panel.
2. Save → Assign as Primary.



### 3. Account compact layout (optional)

1. Object Manager → Account → Compact Layouts → New.
  - Fields: Account Name, Phone, Primary Contact (if present).
2. Save → Assign.

