

Field Creation:

This milestone explains about Field Creation.

1)Fields Available On Custom Object: Passport:

Field Name Data Type

Full Name Text

Contact Number Number

Passport Number Text

Permanent Address Text

2) Field Creation: Full Name

Field Creation: Full Name: Navigate to Setup

2. Click the Object Manager next to Home Tab
3. Type Passport in Quick Find and Select it
4. Click on Fields and Relationships
5. Click New
6. Select Data Type: Text, click on next
7. Field Label: Full Name
8. Length: Max 80
9. Check always requires a value to save this record
10. Click next
11. Next, Save or Save & New (if further new field will be create)

Quick Find / Search... Expand All | Collapse All

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Edit Passport Custom Field
SHAMYUKTHA

Custom Field Definition Edit Change Field Type Save Cancel

Field Information Required Information

Field Label Data Type
Field Name
Description
Help Text
Data Owner
Field Usage
Data Sensitivity Level
Compliance Categorization
Available: PII, HIPAA, GDPR, PCI
Chosen:
General Options
Required ☒ Always require a value in this field in order to save a record
Unique ☐ Do not allow duplicate values
☐ Treat "ABC" and "abc" as duplicate values (case insensitive)
☐ Treat "ABC" and "abc" as different values (case sensitive)
External ID ☐ Set this field as the unique record identifier from an external system
Default Value [Show Formula Editor](#)

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- Email Administration
- Google Apps
- Analytics
- Tableau
- Data.com Administration

Build

- Customize
- Create
 - Apps
 - Custom Labels
 - Interaction Log Layouts
 - Objects
 - Big Objects
 - Picklist Value Sets

Available: PII, HIPAA, GDPR, PCI
Chosen:
General Options
Required ☒ Always require a value in this field in order to save a record
Unique ☐ Do not allow duplicate values
☐ Treat "ABC" and "abc" as duplicate values (case insensitive)
☐ Treat "ABC" and "abc" as different values (case sensitive)
External ID ☐ Set this field as the unique record identifier from an external system
Default Value [Show Formula Editor](#)
Use formula syntax. Enclose text and picklist value API names in double quotes ("The text"), include numbers without quotes (123), 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
Text Options
Length
Change Field Type Save Cancel

3)Field Creation: Contact Number:

- 1.Navigate to Setup
2. Click the Object Manager next to Home Tab
3. Type Passport in Quick Find and Select it
4. Click on Fields and Relationships
5. Click New
6. Select Data Type: Number, click on next

7. Field Label: Contact Number

8. Length:

9. Next, Save

10 and Decimal 0, click

on next

The screenshot shows the 'Edit Passport Custom Field' interface for a field named 'Contact Number'. The field is of type 'Number'. The 'Field Information' section includes fields for 'Field Label' (Contact Number), 'Field Name' (Contact_Number), 'Description', and 'Help Text'. The 'Data Owner' is set to 'User'. The 'Field Usage' is set to '--None--'. The 'Data Sensitivity Level' is set to '--None--'. The 'Compliance Categorization' section shows 'Available' categories (PII, HIPAA, GDPR, PCI) and 'Chosen' categories. The 'General Options' section includes checkboxes for 'Required', 'Unique', 'External ID', and 'AI Prediction'. The 'Default Value' is set to 'Show Formula Editor'.

The screenshot shows the 'Number Options' section of the 'Edit Passport Custom Field' interface. The 'Length' is set to '18' and the 'Decimal Places' is set to '0'. The 'Number Options' section includes a 'Length' field (set to 18) and a 'Decimal Places' field (set to 0). The 'Compliance Categorization' section shows 'Available' categories (PII, HIPAA, GDPR, PCI) and 'Chosen' categories. The 'General Options' section includes checkboxes for 'Required', 'Unique', 'External ID', and 'AI Prediction'. The 'Default Value' is set to 'Show Formula Editor'.

4)Field Creation: Permanent Address

1.Navigate to Setup

2. Click the Object Manager next to Home Tab

3. Type Passport in Quick Find and Select it

4. Click on Fields and Relationships

5. Click New

6. Select Data Type: Text Area, click on next

7. Field Label: Permanent Address

8. Next, next and save

The screenshot shows the 'Custom Field Definition Edit' page for a field named 'Permanent Address'. The page is titled 'Edit Passport Custom Field Permanent Address'. The 'Field Information' section includes fields for 'Field Label' (Permanent Address), 'Field Name' (Permanent_Address), 'Description', 'Help Text', 'Data Owner' (User), 'Field Usage' (--None--), 'Data Sensitivity Level' (--None--), and 'Compliance Categorization' (Available: PII, HIPAA, GDPR, PCI; Chosen:). The 'General Options' section includes a 'Required' checkbox (unchecked) and a 'Default Value' field (Show Formula Editor). The 'Show Formula Editor' field contains the formula: `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`. The page has a sidebar with navigation links and a top bar with a search bar and help link.

This screenshot is identical to the one above, showing the 'Custom Field Definition Edit' page for the 'Permanent Address' field. It displays the same form fields and options, including the 'Field Information' and 'General Options' sections, and the sidebar navigation.

5)Fields Available On Custom Object: Visa Slot Field Name
Data Type

Location Text

Time Date & Time

Visa Slot Number Auto Number (Use in Record Name)

Passport Number Master-Detail

Status Picklist

Quick Find / Search ...

Expand All | Collapse All

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Edit Visa Slot Custom Field

Status

Help for this Page

Custom Field Definition Edit

Change Field Type | Promote to Global Value Set | Save | Cancel

Field Information

Required Information

Field Label

Status

Data Type

Picklist

Field Name

Status

Description

Help Text

Data Owner

User

Field Usage

--None--

Data Sensitivity Level

--None--

Compliance Categorization

Available

PII

HIPAA

GDPR

PCI

Chosen

General Options

Required

☐ Always require a value in this field in order to save a record

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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- Email Administration
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Compliance Categorization

Available

PII

HIPAA

GDPR

PCI

Chosen

General Options

Required

☐ Always require a value in this field in order to save a record

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

Picklist Options

☒ Restrict picklist to the values defined in the value set

Change Field Type | Promote to Global Value Set | Save | Cancel

6)Fields Available On Custom Object: Payment

Field Name Data Type

Payment Mode Picklist (Values- Debit Card, Credit Card) Card

Number Number

Transaction Id Auto Number (Used in Record Name)

Visa Slot Number Master-Detail

Cancel Transaction Text

Apps:

Apps in Salesforce are a group of tabs that help the application function by working together as a unit. It has a name, a logo, and a particular set of tabs. The simplest app usually has just two tabs.

There are two types of Salesforce Applications:

- 1) Standard Apps
- 2) Custom Apps

1)Creation Of App:

Click on setup and go to home page.

1. In Quick Find Box search and select App Manager.

2. Click: New Lightning App.

3. App Name: Book My Visa and click on next.

4. Navigate System: Standard Navigation Support

Form Factor: Desktop and Phone Click next, next

5. Move Objects from available items to selected items.
(Passport, Visa Slot, Payment).

6. Add System Administrator profile, available profile to
selected profile.

Save & Finish

The screenshot shows the 'App Settings' page in Salesforce, specifically the 'App Details & Branding' section. The left sidebar lists 'App Settings' with sub-items: 'App Details & Branding' (selected), 'App Options', 'Utility Items (Desktop Only)', 'Navigation Items', and 'User Profiles'. The main content area is titled 'App Details & Branding' and includes the instruction: 'Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.' The 'App Details' section contains three input fields: '*App Name' (filled with 'Book My Visa'), '*Developer Name' (filled with 'Book_My_Visa'), and 'Description' (placeholder 'Enter a description...'). The 'App Branding' section includes an 'Image' upload area with an 'Upload' button, a 'Primary Color Hex Value' dropdown set to '#0070D2', and an 'Org Theme Options' checkbox (unchecked) with the text 'Use the app's image and color instead of the org's custom theme'. At the bottom, an 'App Launcher Preview' shows a blue square icon with 'BM' and a grey button labeled 'Book My Visa'.

Lightning App Builder

App Settings

Pages

Book My Visa

Help

App Settings

App Details & Branding

App Options

Utility Items (Desktop Only)

Navigation Items

User Profiles

App Options

Navigation and Form Factor

Setup and Personalization

* Navigation Style

Standard navigation

Console navigation

* Supported Form Factors

Desktop and phone

Desktop

Phone

Setup Experience

Setup (full set of Setup options)

Service Setup

App Personalization Settings

Disable end user personalization of nav items in this app

Disable temporary tabs for items outside of this app