

SALESFORCE DEVELOPER

PROJECT TITLE : WORKFORCE ADMINISTRATION SOLUTION

TEAM ID : NM2023TMID0250

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FIELDS

When we talk about Salesforce, Fields represent the data stored in the columns of a relational database. It can hold any valuable information that you require for a specific object. Hence, the overall searching, deletion, and editing of the records become simpler and quicker.

Types of Fields

1. Standard Fields
2. Custom Fields

Standard Fields:

As the name suggests, the Standard Fields are the predefined fields in Salesforce that perform a standard task. The main point is that you can't simply delete a Standard Field until it is a non-required standard field. Otherwise, users have the option to delete them at any point from the application freely. Moreover, we have some fields that you will find common in every Salesforce application. They are,

? Created By

? Owner

? Last Modified

? Field Made During object Creation

Custom Fields:

On the other side of the coin, Custom Fields are highly flexible, and users can change them according to requirements. Moreover, each organizer or company can use them if necessary. It means you need not always include them in the records, unlike Standard fields. Hence, the final decision depends on the user, and he can add/remove Custom Fields of any given form.

Use Case:

Now it's time for you to think out of the box for your organization. You have successfully created the database objects for the organization but now all eyes turn on you as you have to define what sort of information the objects store which you have created. As a life saver of your organization you come up with the idea of creating fields to store different types of data.

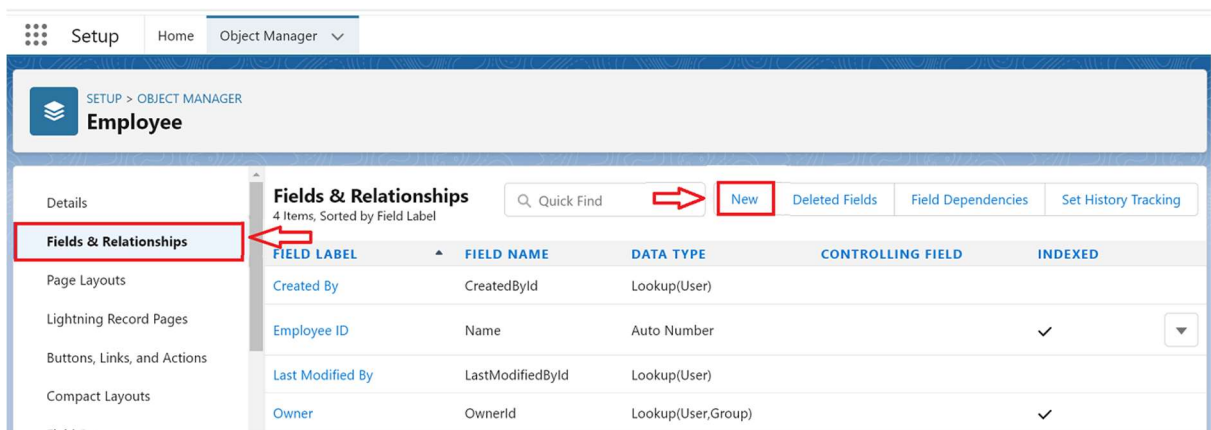
CREATING TEXT FIELD IN EMPLOYEE OBJECT

To create fields in an object:

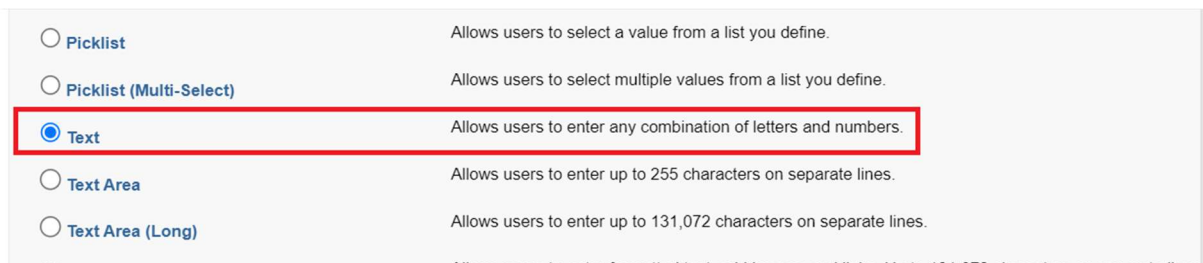
1. Go to setup >>> click on Object Manager >>> type object name(Employee) in quick find bar >>> click on the object.



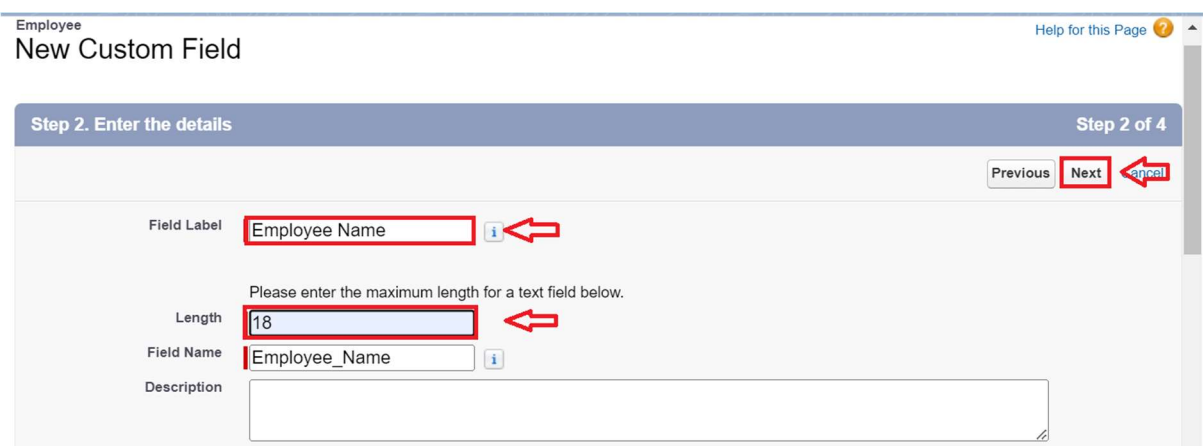
2. Now click on “Fields & Relationships” >>> New



3. Select Data type as “Text”.



4. Click on Next



5. Fill the above as following:

- Field Label: Employee Name
- Length : 18
- Field Name : gets auto generated
- Click on Next >>> Next >>> Save and new.

CREATING DATE OF BIRTH FIELD IN EMPLOYEE OBJECT

1. Repeat step 1 and 2 mentioned in activity 1
2. Select Data type as “Date” and click Next.

<input type="radio"/> Checkbox	Allows users to select a True (checked) or False (unchecked) value.
<input type="radio"/> 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.
<input checked="" type="radio"/> Date	Allows users to enter a date or pick a date from a popup calendar.
<input type="radio"/> 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.
<input type="radio"/> 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

3. Click on Next.
4. Fill the above as following:
 - a. Field Label: Date of Birth.
 - b. Field Name : gets auto generated.
 - c. Click on Next >>> Next >>> Save and new.

CREATING FORMULA FIELD IN EMPLOYEE OBJECT

1. Repeat step 1 and 2 mentioned in activity 1
2. Select Data type as “Formula” and click Next.
3. Give Field Label and Field Name as “Age” and select formula return type as “Number” and click next.

Step 2. Choose output type Step 2 of 5

Previous **Next** Cancel

Field Label Age ← Field Name Age ←

Auto add to custom report type ☒ Add this field to existing custom report types that contain this entity i

Formula Return Type

☐ None Selected Select one of the data types below.

☐ Checkbox Calculate a boolean value.
Example: `TODAY() > CloseDate`

☐ Currency Calculate a dollar or other currency amount and automatically format the field as a currency amount.
Example: `Gross Margin = Amount - Cost_c`

☐ Date Calculate a date, for example, by adding or subtracting days to other dates.
Example: `Reminder Date = CloseDate - 7`

☐ Date/Time Calculate a date/time, for example, by adding a number of hours or days to another date/time.
Example: `Next = NOW() + 1`

☒ **Number** Calculate a numeric value.
Example: `Fahrenheit = 1.8 * Celsius_c + 32` ←

4. Under Advanced Formula write down the formula and click “Check Syntax” and Next>>> Next>>> Save & New.

Step 3. Enter formula Step 3 of 5

Previous **Next** Cancel

Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula subtab to use additional fields, operators, and functions.

Example: `Fahrenheit = 1.8 * Celsius_c + 32` More Examples...

Advanced Formula

Age (Number) =
YEAR(TODAY()) - YEAR(Date_of_Birth_c)

Check Syntax No syntax errors in merge fields or functions. (Compiled size: 71 characters)

Description

Quick Tips

- [Getting Started](#)
- [Operators & Functions](#)

Functions

-- All Function Categories --

ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN

Creating Remaining Fields In Employee Object

Now create the remaining fields using the data types mentioned in the table.

S	Object	Field
1	Name	

No																												
1	Employee	<table><thead><tr><th>Field Name</th><th>Data type</th></tr></thead><tbody><tr><td>• Qualification</td><td>Text</td></tr><tr><td>• Address</td><td>Text Area</td></tr><tr><td>• Experience</td><td>Text Area</td></tr><tr><td>• Phone no</td><td>Phone</td></tr><tr><td>• Email</td><td>Email</td></tr><tr><td>• Joining date</td><td>Date</td></tr><tr><td>• Mode of Work</td><td>Picklist: Values <div>On Site Remote</div></td></tr><tr><td>• Cab Allowance</td><td>Check box</td></tr><tr><td>• Food Allowances</td><td>Check box</td></tr><tr><td>• Wifi Allowances</td><td>Check box</td></tr><tr><td>• Cab Allowance Amount</td><td>Currency</td></tr><tr><td>• Food Allowance Amount</td><td>Currency</td></tr></tbody></table>	Field Name	Data type	• Qualification	Text	• Address	Text Area	• Experience	Text Area	• Phone no	Phone	• Email	Email	• Joining date	Date	• Mode of Work	Picklist: Values <div>On Site Remote</div>	• Cab Allowance	Check box	• Food Allowances	Check box	• Wifi Allowances	Check box	• Cab Allowance Amount	Currency	• Food Allowance Amount	Currency
Field Name	Data type																											
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• Experience	Text Area																											
• Phone no	Phone																											
• Email	Email																											
• Joining date	Date																											
• Mode of Work	Picklist: Values <div>On Site Remote</div>																											
• Cab Allowance	Check box																											
• Food Allowances	Check box																											
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• Cab Allowance Amount	Currency																											
• Food Allowance Amount	Currency																											

		<table><tr><td>• Wifi Allowance Amount</td><td>Currency</td></tr><tr><td>• Login Time</td><td>Time</td></tr><tr><td>• Logout Time</td><td>Time</td></tr><tr><td>• LinkedIn Profile</td><td>url</td></tr></table>	• Wifi Allowance Amount	Currency	• Login Time	Time	• Logout Time	Time	• LinkedIn Profile	url									
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• Login Time	Time																		
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• Wor king Hou rs • Em ploy ee Na me						
		Note: here in Finishes in field, Start Date and End Date belong to Employee Object.				

4	Asset Service											
		<table><tr><th>Field Name</th><th>Data type</th></tr><tr><td><ul style="list-style-type: none">Asset Id</td><td>Lookup relationship with Asset object</td></tr><tr><td><ul style="list-style-type: none">Type</td><td>Picklist: Values<div><div>Technical Issue</div><div>Non Technical Issue</div></div></td></tr><tr><td><ul style="list-style-type: none">Technician</td><td>Text</td></tr><tr><td><ul style="list-style-type: none">Subject</td><td>Text Area</td></tr><tr><td><ul style="list-style-type: none">Description</td><td>Text Long</td></tr></table>	Field Name	Data type	<ul style="list-style-type: none">Asset Id	Lookup relationship with Asset object	<ul style="list-style-type: none">Type	Picklist: Values <div><div>Technical Issue</div><div>Non Technical Issue</div></div>	<ul style="list-style-type: none">Technician	Text	<ul style="list-style-type: none">Subject	Text Area
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<p>Note: here in the Date of Issue field, the Joining date field belongs to the Employee Object.</p>				

MASTER-DETAIL RELATIONSHIP

CREATING MASTER-DETAIL RELATIONSHIP BETWEEN EMPLOYEE & PROJECT TASK OBJECT

To Create a Master-Detail relationship

1. Go to the setup page >>> click on object manager >>> type object name(ProjectTask) in the quick find bar>>> click on the object.
2. Click on fields & relationship >>> click on New.
3. Select “Master-Detail relationship” as data type and click Next.
4. For field label related to: select “Employee” object and click Next.

5. Give Field Label as “Employee Name” and click Next.
6. Next >>>Next >>>Save & New.