

Fields and Relationship:

Fields in Salesforce represent what the columns represent in relational databases. It can store data values which are required for a particular object in a record.

There are 2 types of fields in salesforce:

Standard fields: There are four standard fields in every custom object that are Created By, Last Modified By, Owner, and the field created at the time of the creation of an object. These fields cannot be deleted or edited and they are always required. For standard objects, the fields which are present by default in them and cannot be deleted from standard objects are standard fields.

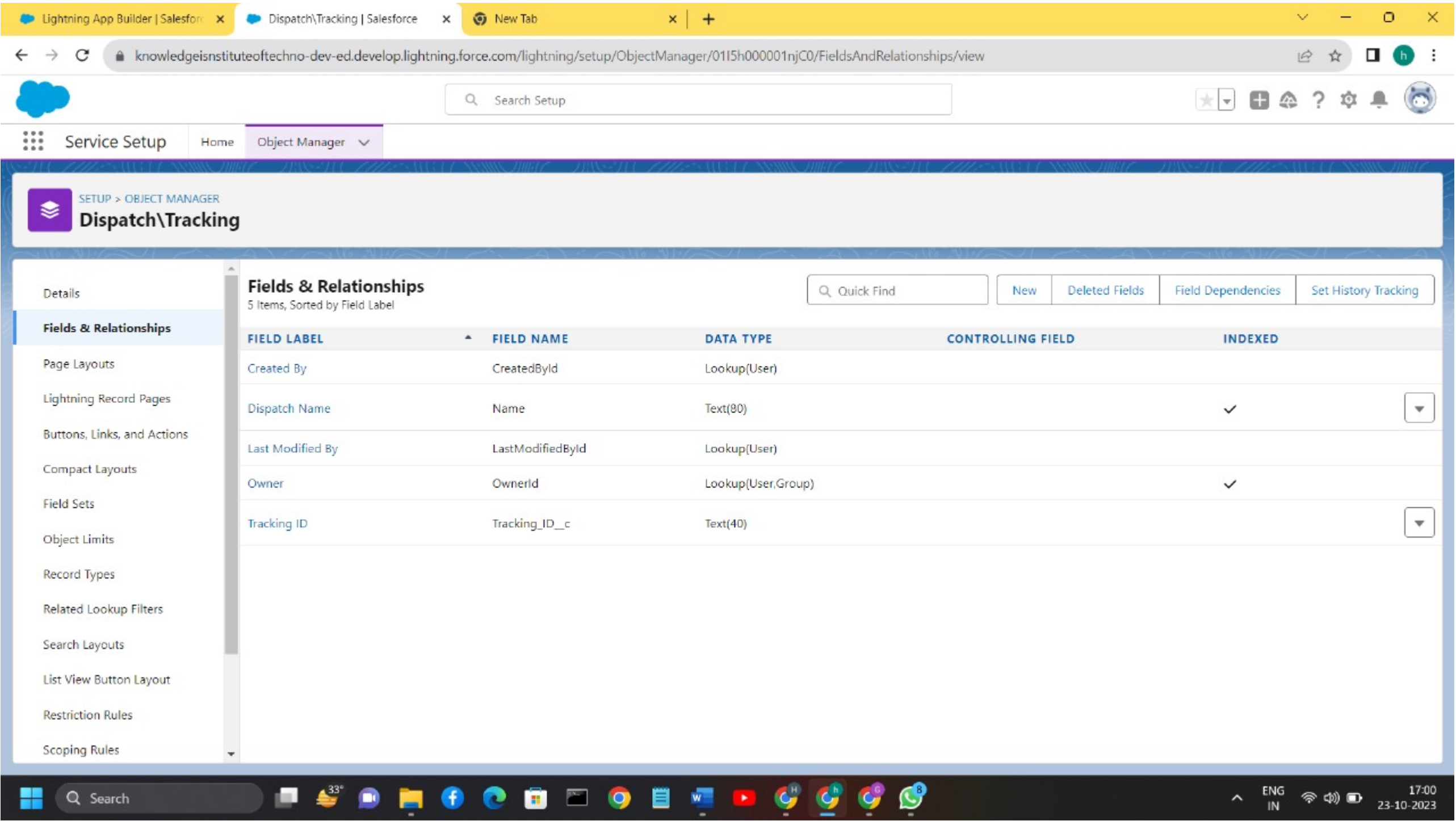
Custom fields: The Custom fields which are added by the administrator/developer to meet the business requirements of any organization. They may or may not be required.

1)Creation of Fields for The Dispatch/Tracking

- 1.click the gear icon and select Setup. This launches Setup in a new tab.
- 2.Click the Object Manager tab next to Home.
- 3.Select Dispatch/Tracking.
- 4.Select Fields & Relationships from the left navigation, and click New
- 5.Choose the data type as Text, click next
- 6.For Field Label, enter Tracking ID & length = 40
- 7.Next, Next and Click save.
8. Now let's create the other fields and we must choose the data types of the fields carefully. Let's have a look at it. Similarly

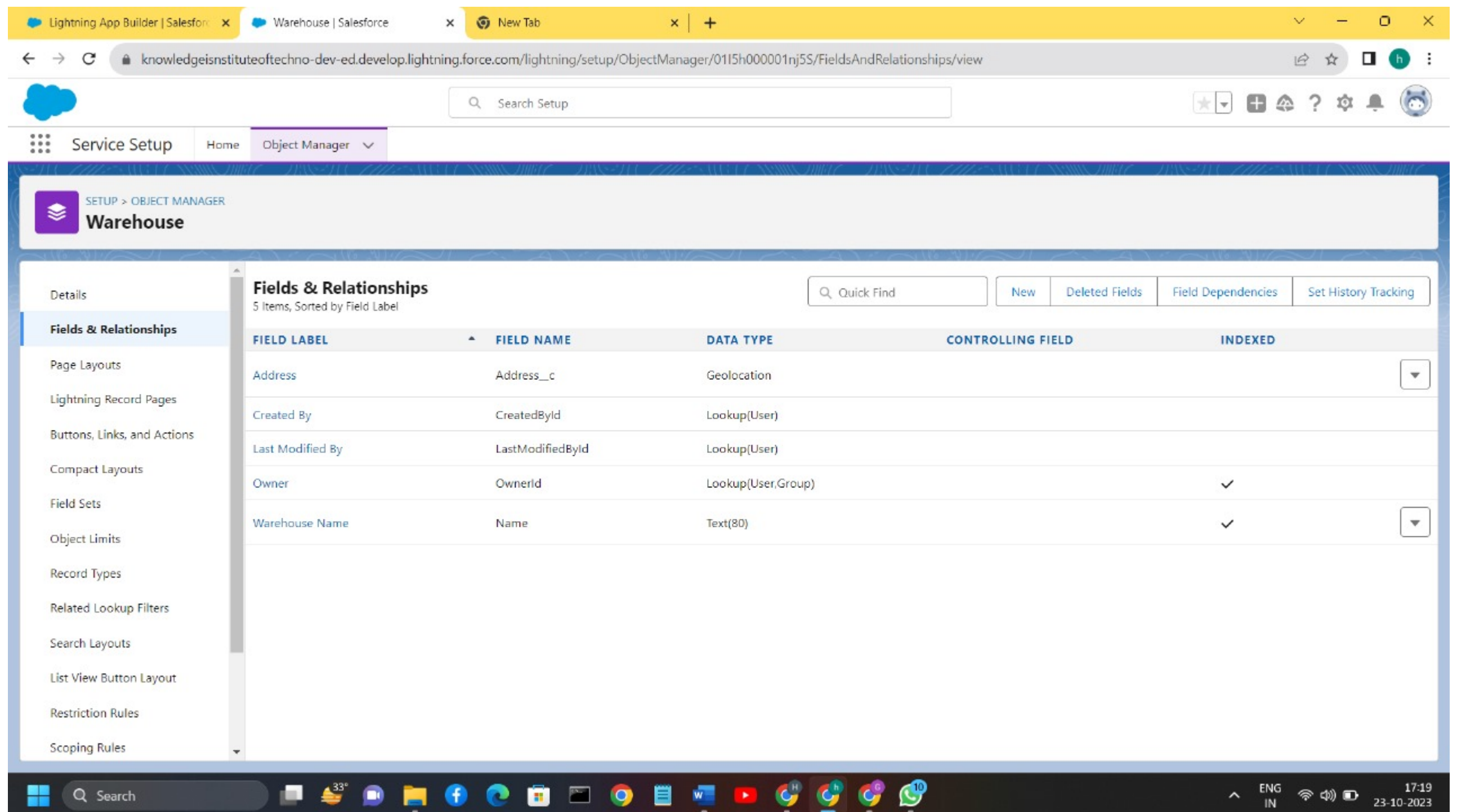
create fields for Warehouse object- Address, Location select datatype according table. Similarly create fields for Dispatch/Delivery object- Dispatched, Expected date of delivery select datatype according table

9.Click Next, Next, then Save & New.




2)Creation of Fields for The Warehouse Objects

- 1.Select the Location as the Data Type, then click Next.
- 2.For Field Label as Address Click Next, Next, then Save & New
- 3.Select the Address as the Data Type, then click Next. For Field Label, Location Description.
- 4.Click Next, Next, then Save & New.



3) Creation of Dispatch/Delivery for Job Object

1. From Setup, go to Object Manager
2. On the sidebar, click Fields & Relationships.
3. Click New.
4. Choose Dispatch/Delivery and click Next
5. Choose the datatype as date and select the label name Expected date.
6. Click Next, Next, then Save

<div> <div>  <div> <div>SETUP > OBJECT MANAGER</div> <div>Dispatch/Delivery</div> </div> </div> </div>					
<div> <div>Details</div> <div>Fields & Relationships</div> <div>Page Layouts</div> <div>Lightning Record Pages</div> <div>Buttons, Links, and Actions</div> <div>Compact Layouts</div> <div>Field Sets</div> <div>Object Limits</div> <div>Record Types</div> <div>Related Lookup Filters</div> <div>Search Layouts</div> <div>List View Button Layout</div> <div>Restriction Rules</div> <div>Scoping Rules</div> </div>	<div> <div>Fields & Relationships</div> <div>5 Items, Sorted by Field Label</div> <div> <div>Quick Find</div> <div>New</div> <div>Deleted Fields</div> <div>Field Dependencies</div> <div>Set History Tracking</div> </div> </div>				
	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
	Created By	CreatedById	Lookup(User)		
	Dispatch Name	Name	Text(80)		✓
	Expected	Expected__c	Date		
	Last Modified By	LastModifiedById	Lookup(User)		
	Sales order	Sales_order__c	Master-Detail(Sales order)		✓

4)Master detail relationship Dispatch /Delivery

Let's create a master-detail relationship on Dispatch/Delivery object.

- 1.Select Master-Detail Relationship as the Data Type and click Next.
- 2.For Related to, enter Sales order.
- 3.Click Next.
- 4.For Field Label, enter Sales order.
- 5.Click Next, Next, Next and Save.

Setup Home Object Manager ▾

SETUP > OBJECT MANAGER
Dispatch/Delivery

Custom Field Definition Edit Change Field Type Save Cancel

Field Information ! = Required Information

Field Label Data Type Master-Detail

Field Name

Description

Help Text

Data Owner

Field Usage

Data Sensitivity Level

Compliance Categorization

Available	Chosen
PII	
HIPAA	
GDPR	
PCI	

Master-Detail Options

Related To Child Relationship Name

Related List Label

Sharing Setting ☐ Read Only: Allows users with at least Read access to the Master record to create, edit, or delete related Detail records.

☒ Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.

5)Create Picklist Fields on Sales order

- 1.From Setup, click Object Manager and select Sales order.
- 2.Click Fields & Relationships, then New.
- 3.Select Picklist as the Data Type and click Next.
- 4.For Field Label enter Status
- 5.Select Enter values, with each value separated by a new line and enter these values:
- 6.Open,Hold,Shipped,Returned
- 7.Click Next, Next, then Save & New

Setup Home Object Manager

SETUP Object Manager

Edit Sales order Custom Field
Status

Step 2. Enter the details Step 2 of 3

Field Label Status

Below is a list of picklist values. Click Edit to change the name of the value or make it the default value.

Action	Values	API Name	Default	Chart Colors	Modified By
<input type="checkbox"/> Edit Del	Open	Open	<input type="checkbox"/>	Assigned dynamically	GIRIHARAN S, 19/10/2023, 3:53 pm
<input type="checkbox"/> Edit Del	Hold	Hold	<input type="checkbox"/>	Assigned dynamically	GIRIHARAN S, 19/10/2023, 3:53 pm
<input type="checkbox"/> Edit Del	Shipped	Shipped	<input type="checkbox"/>	Assigned dynamically	GIRIHARAN S, 19/10/2023, 3:53 pm
<input type="checkbox"/> Edit Del	Returned	Returned	<input type="checkbox"/>	Assigned dynamically	GIRIHARAN S, 19/10/2023, 3:53 pm

Field Name Status

Description

Help Text

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

Setup Home Object Manager

SETUP > OBJECT MANAGER Sales order

Edit Sales order Custom Field
Status

Custom Field Definition Edit Change Field Type Promote to Global Value Set Save Cancel

Field 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

6)Lookup Relationship

1.Select look up Relationship as the Data Type and click Next.

2.For Related to, enter Account.

3.Click Next.

4.For Field Label, enter Customer.

5.Click Next, Next, Next and Save.

Setup

Home

Object Manager

SETUP

Object Manager

Edit Relationship

Sales order

Help for this Page

Step 2. Enter the label and name for the lookup field

Step 2 of 4

Field Label

Customer

Field Name

Customer

Description

Help Text

Child Relationship Name

Sales_orders

Required

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

☒ Clear the value of this field. You can't choose this option if you make this field required.

☐ Don't allow deletion of the lookup record that's part of a lookup relationship.

What to do if the lookup record is deleted?

Lookup Filter

6.Click lookup filter.


7. Provide filter as given below & also refer picture (Screenshot of Step Contact: Account ID equals Sales Order: Customer)

8.ClickNext,Next,NextandSave

Setup

Home

Object Manager



SETUP > OBJECT MANAGER

Sales order

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Custom Field Definition Detail

Edit

Set Field-Level Security

View Field Accessibility

Where is this used?

Field Information

Field Label	Contact	Object Name	Sales_order
Field Name	Contact	Data Type	Lookup
API Name	Contact__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	GIRIHARAN S. 20/10/2023, 11:25 am	Modified By	GIRIHARAN S. 20/10/2023, 11:35 am

Lookup Options

Related To	Contact	Child Relationship Name	Sales_orders
Related List Label	Sales orders		
Required	<input type="checkbox"/>		
What to do if the lookup record is deleted?	Clear the value of this field.		

Lookup Filter

Filter Criteria	Contact: Account Name ID EQUALS Sales order: Customer ID
Filter Type	Required. The user-entered value must match filter criteria.
Error Message	Value does not exist or does not match filter criteria.
Lookup Window Text	
Active	<input checked="" type="checkbox"/>

7) Create Field Dependency (On Candidate Object)

1. Create a dependency between these two picklists, so that when a state is selected, only respective Values are available.

2.The below steps will assist you in creating Field Dependencies.

3. Click on the gear icon and then select Setup.

4. Click on the object manager tab just beside the home tab.
5. After the above steps, Select Candidate Object
6. Now Select Fields and relationships from setup menu of the Candidate object.
7. Click Field Dependencies.
8. Click New.
9. Select State as the Controlling Field and select City as the Dependent Field.
10. Click Continue.
11. Select the appropriate Value in each column by double-clicking them. For Ex. Rajasthan - Jaipur
12. Click Include Values. And it is also same for UP, MP & Punjab with its city.
13. Click Preview, then test the dependency by selecting different State and viewing the associated Values available for Particular state.
14. Click Close to close the preview window.
15. Click Save.

The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. The 'Candidate' object is chosen, and the 'Fields & Relationships' section is active. A table displays field dependencies for the 'State' (Controlling Field) and 'City' (Dependent Field). The table has four columns for different states: Rajasthan, UP, MP, and Punjab. Each column lists cities: Jaipur, Jalandhar, Lucknow, and Bhopal. The 'Include Values' button is visible, and a legend indicates that yellow cells represent 'Included Value' and grey cells represent 'Excluded Value'.

State:	Rajasthan	UP	MP	Punjab
City:	Jaipur	Jaipur	Jaipur	Jaipur
	Jalandhar	Jalandhar	Jalandhar	Jalandhar
	Lucknow	Lucknow	Lucknow	Lucknow
	Bhopal	Bhopal	Bhopal	Bhopal

8)Cross-Object Formula Field

Cross-object formula field- A cross-object formula field is basically a formula field. A cross-object formula can reference merge fields from a master ("parent") object if an object is on the detail side of a master-detail relationship. A cross-object formula works with Lookup relationships as well as in Master detail relationship. You can reference fields from objects that are up to 10 relationships away. Creation of cross object formula field

- 1.Select your object from object selection has Contact.
- 2.Select the option fields and relationships.
- 3.That will navigate to enter the details page where you give the field label.
4. Give the label name has Account Website
- 5.Select formula return type Text
- 6.In the formula field enter this formula Account. Website.
- 7.Click next you will navigate to field level security click on visible checkbox so that it is visible to all profiles.
- 8.Select the next option, select the page layout and save it.



Contact

Details

Fields & Relationships

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Scoping Rules

Formula Options

Formula Return Type

Text

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

Example: Full Name = LastName & " " & FirstName

More Examples

Quick Tips

Getting Started

Operators & Functions

Simple Formula

Advanced Formula

Select Field Type

Contact

Insert Field

-- Insert Merge Field --

Insert Operator

Account Website (Text) =

Account.Website