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

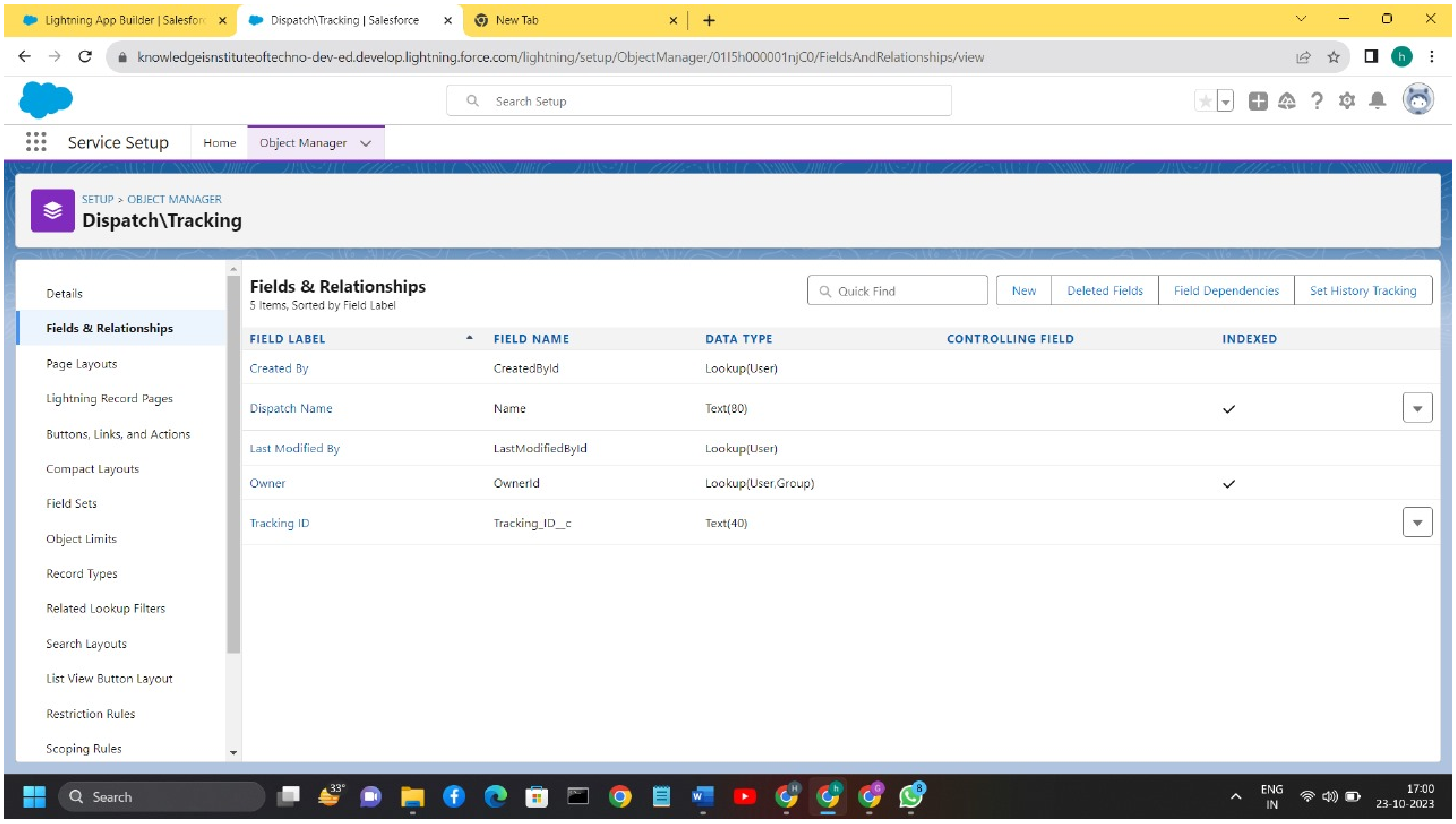
6.For Field Label, enter Tracking ID & length = 40

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.



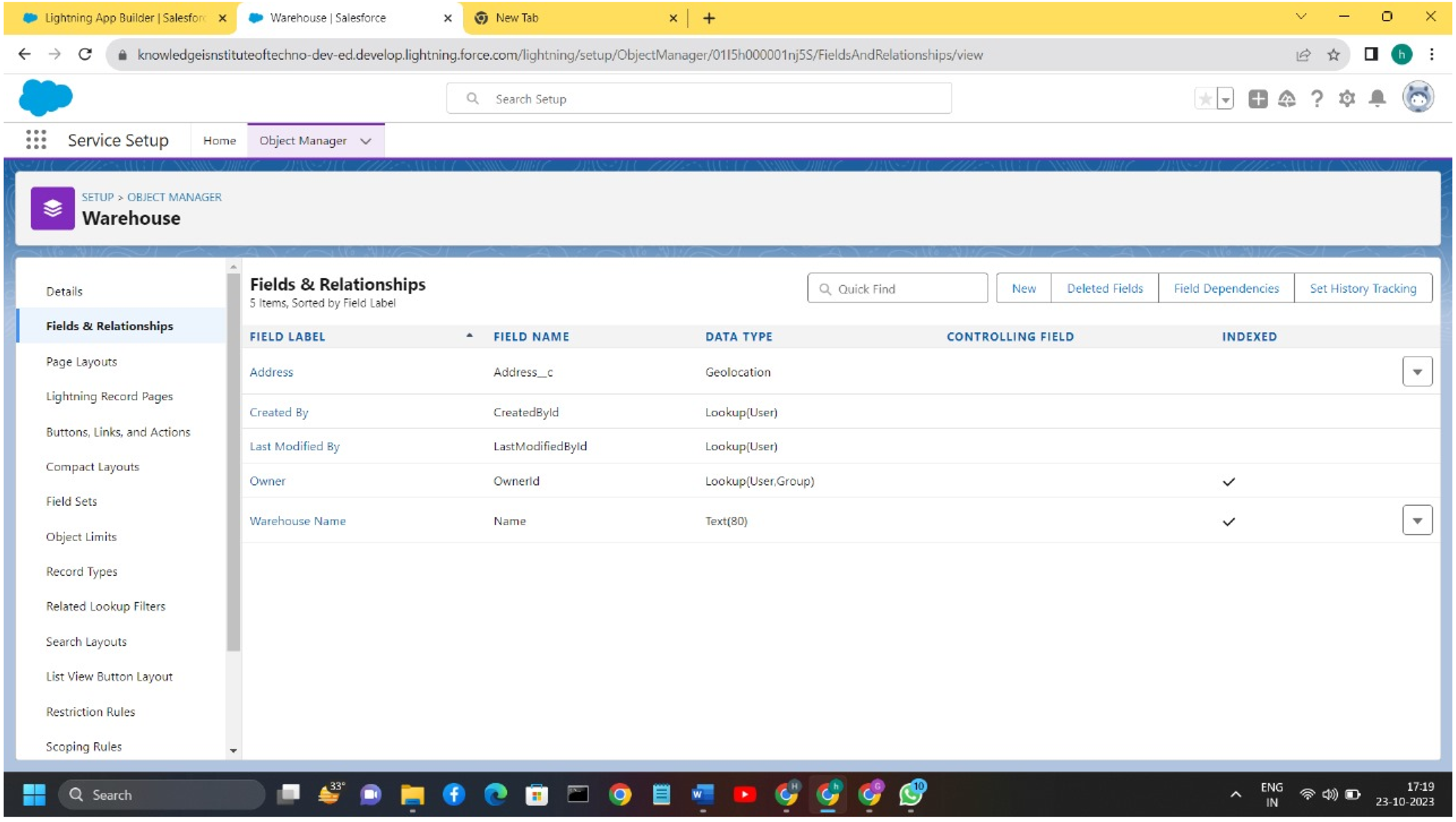
2)Creation of Fields for The Warehouse Objects

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

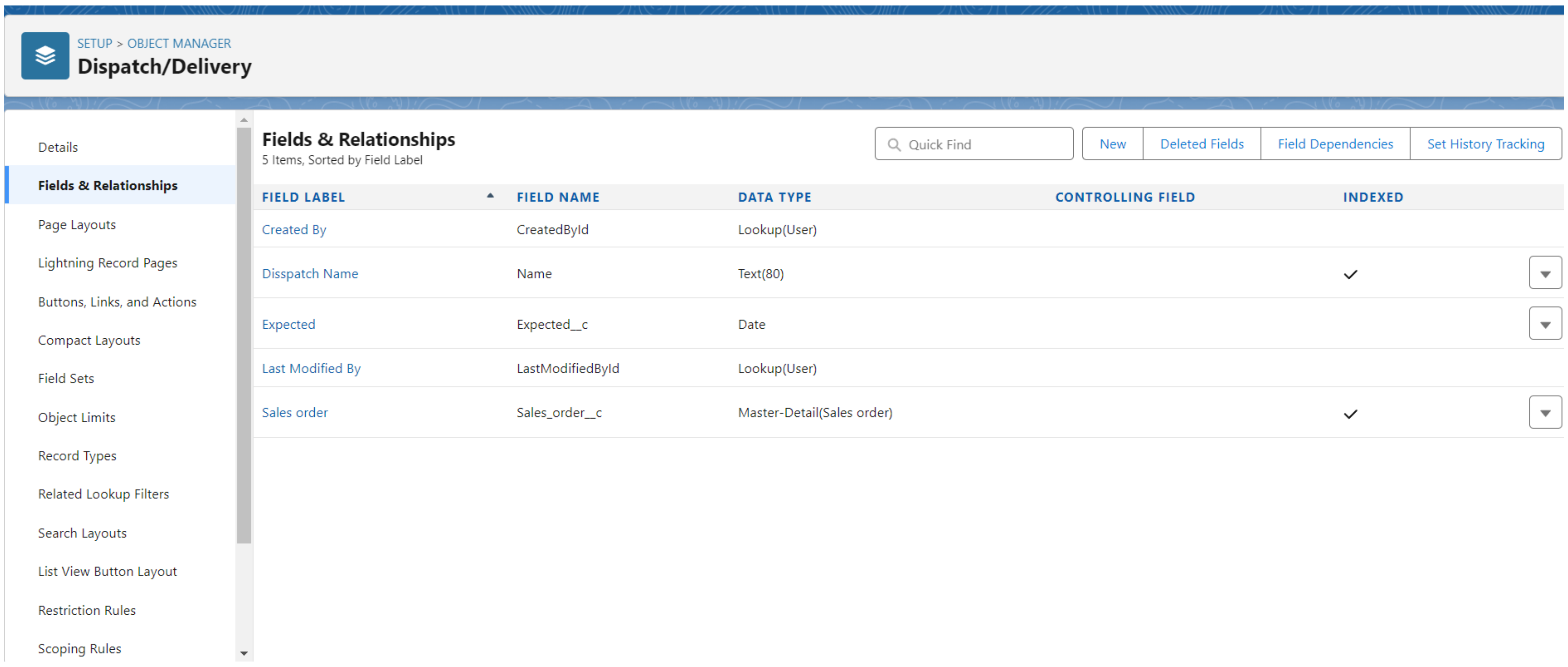
2.On the sidebar, click Fields & Relationships.

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



4)Master detail relationship Dispatch /Delivery

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

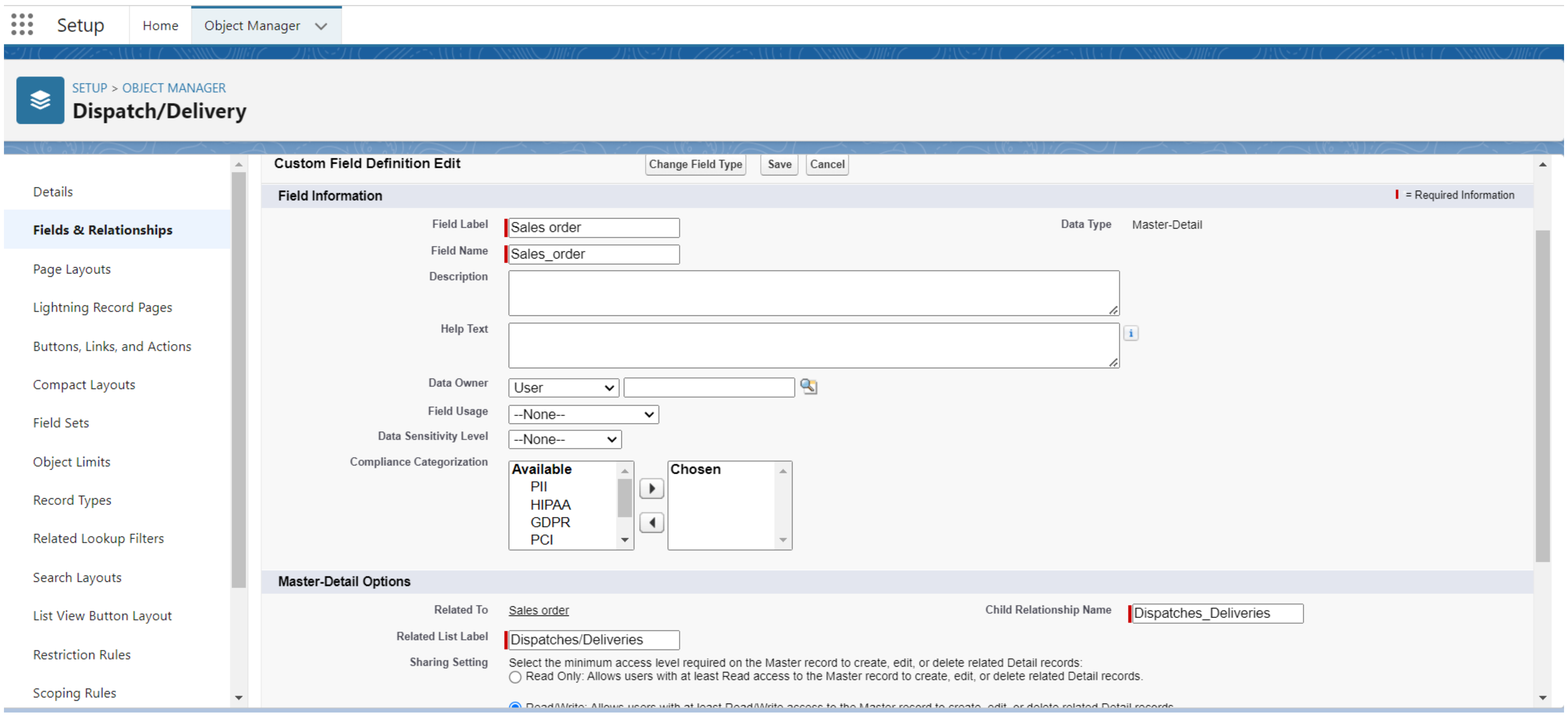
1.Select Master-Detail Relationship as the Data Type and click Next.

2.For Related to, enter Sales order.

3.Click Next.

4.For Field Label, enter Sales order.

5.Click Next, Next, Next and Save.



5)Create Picklist Fields on Sales order

1.From Setup, click Object Manager and select Sales order.

2.Click Fields & Relationships, then New.

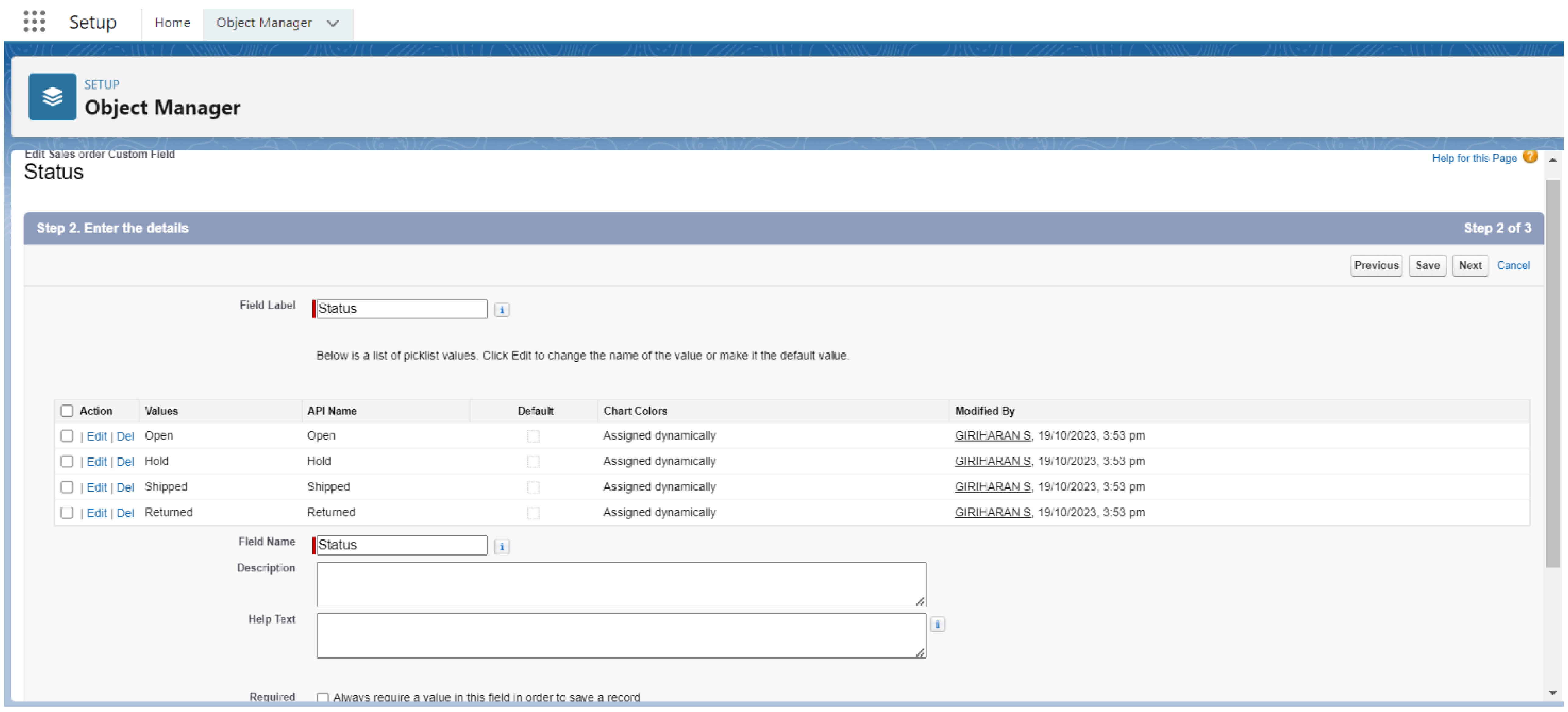
3.Select Picklist as the Data Type and click Next.

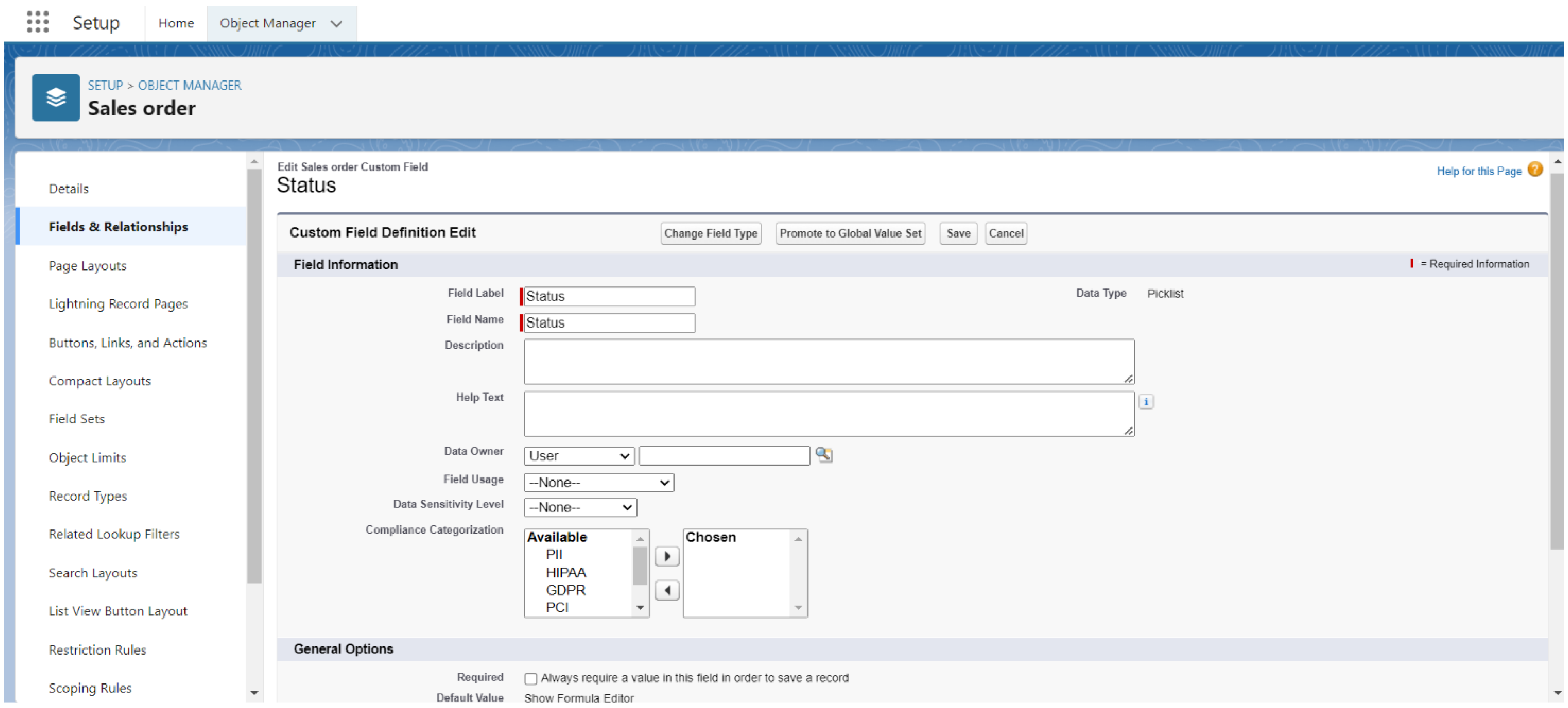
4.For Field Label enter Status

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





6)Lookup Relationship

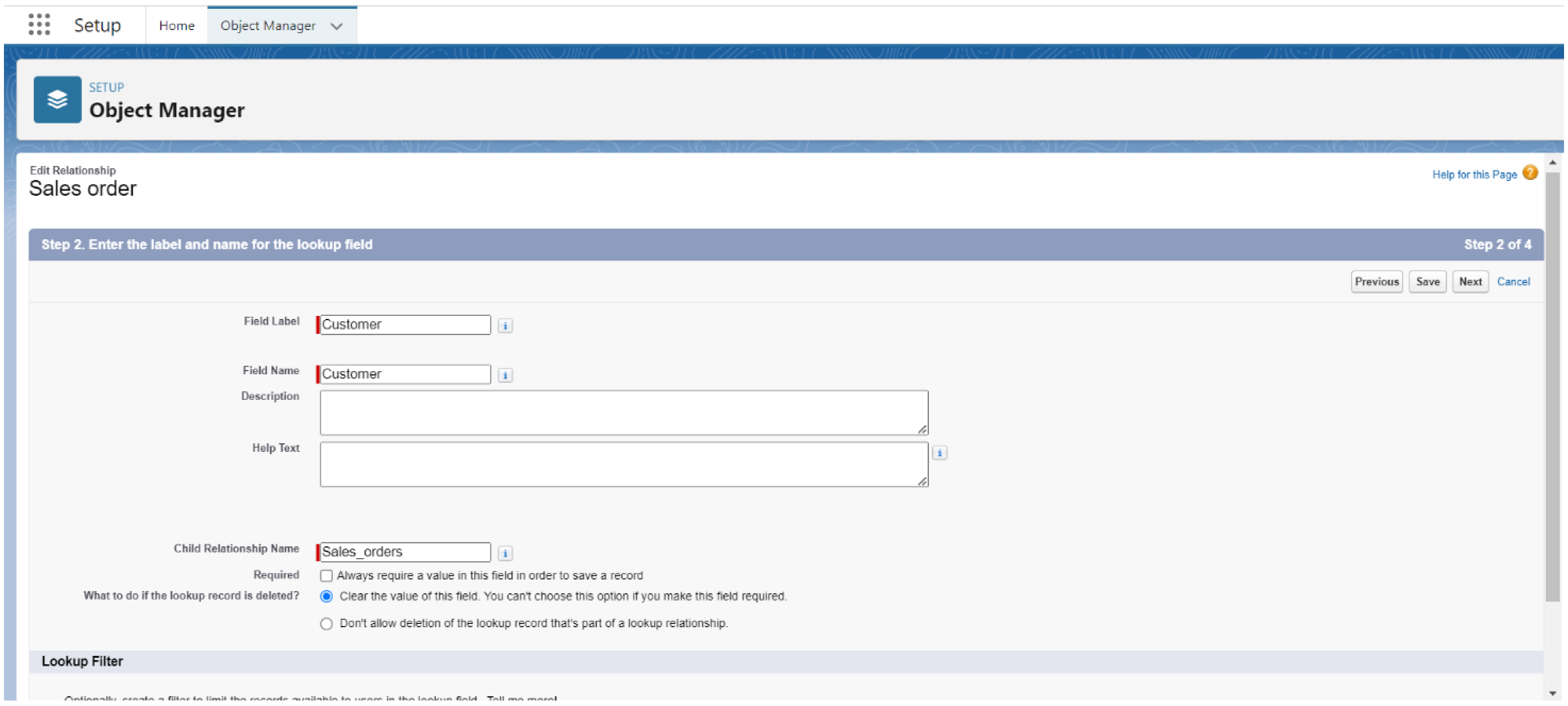
1.Select look up Relationship as the Data Type and click Next.

2.For Related to, enter Account.

3.Click Next.

4.For Field Label, enter Customer.

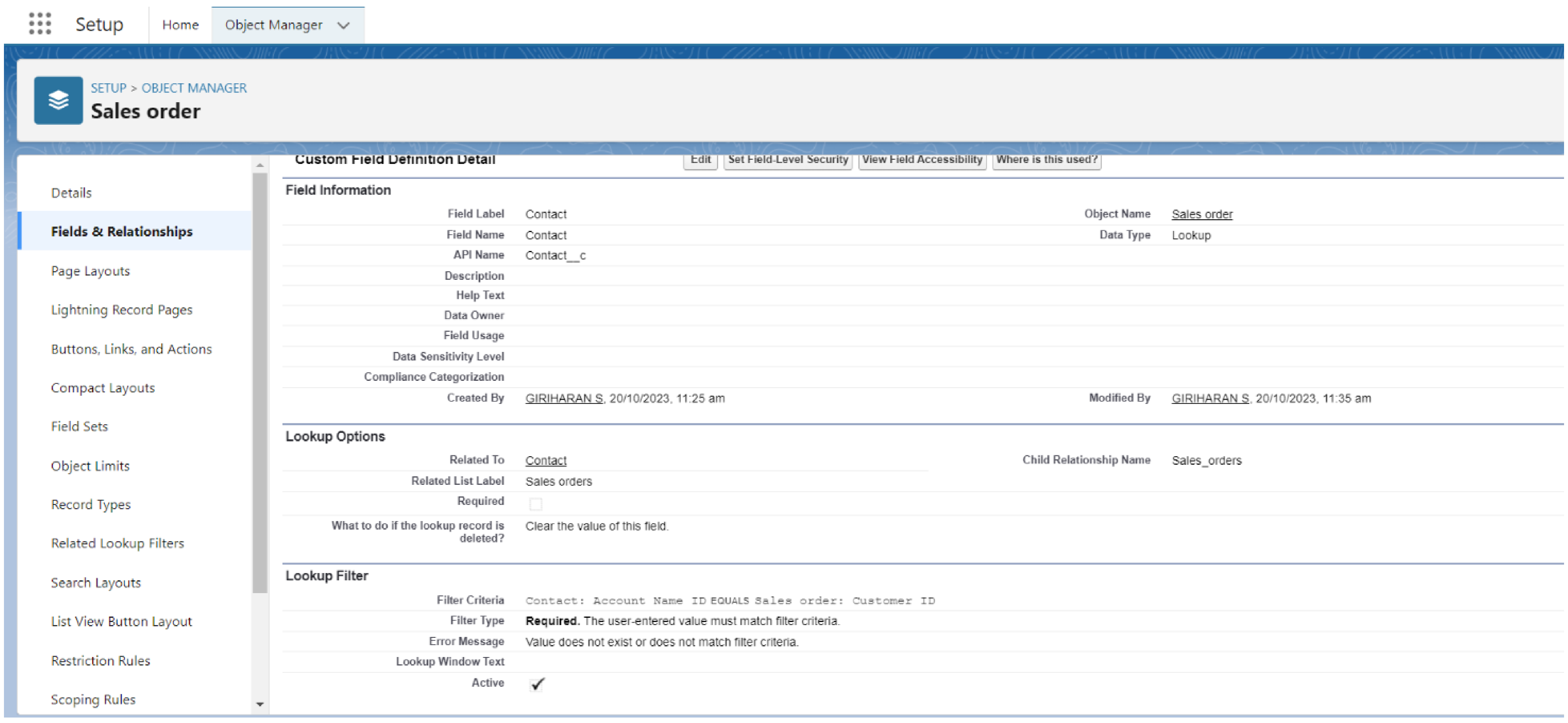
5.Click Next, Next, Next and Save.



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



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.

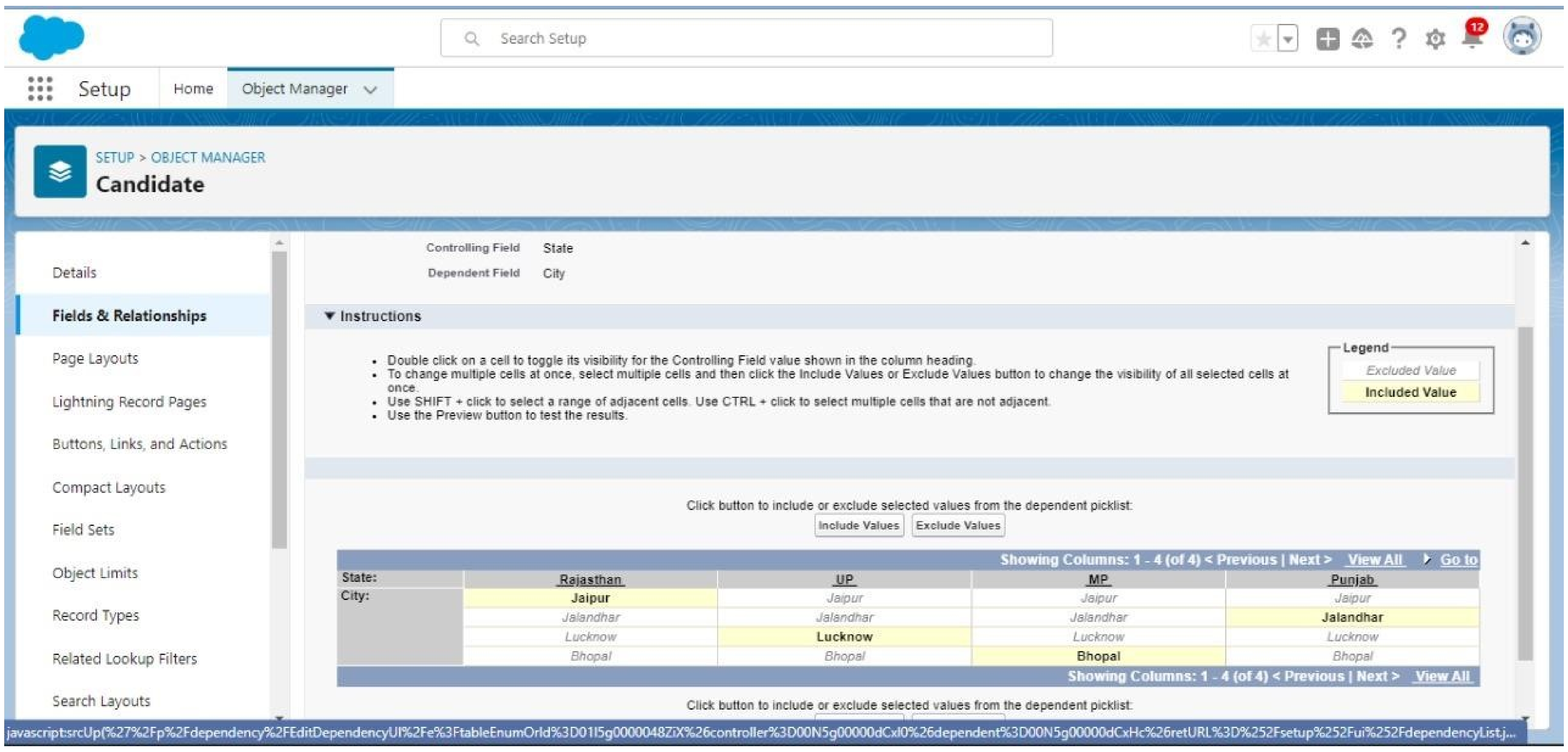
11.Select the appropriate Value in each column by double-clicking them. For Ex. Rajasthan - Jaipur

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 associate Values available for Particular state.

14.Click Close to close the preview window.

15.Click Save.



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.

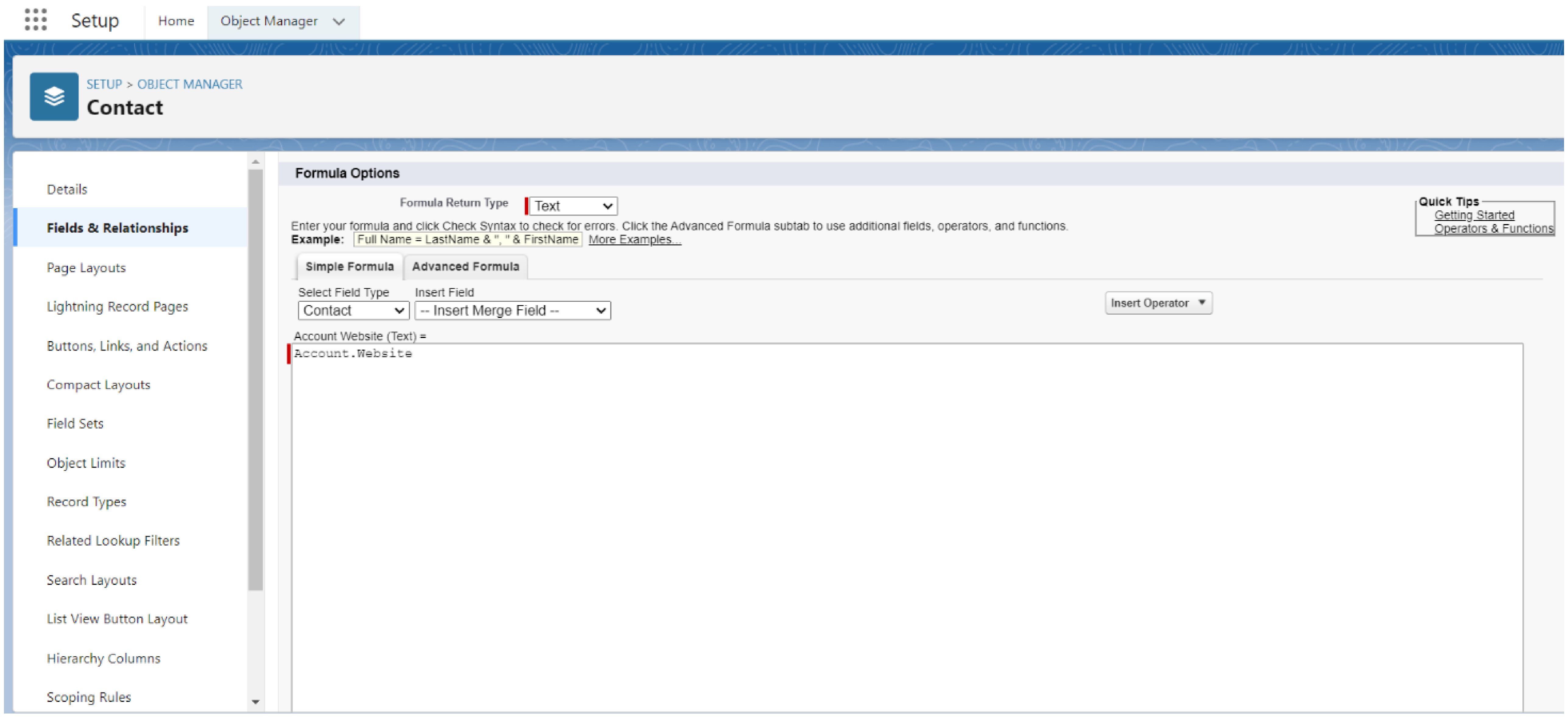
4. Give the label name has Account Website

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.


Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Contact
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
Hierarchy Columns
Scoping Rules
Formula Options
Formula Return Type
Text
Quick Tips
Getting Started
Operators & Functions
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...
Simple Formula
Advanced Formula
Select Field Type
Insert Field
Contact
-- Insert Merge Field --
Insert Operator
Account Website (Text) =
Account.Website