

PROJECT TITTLE: MEDICAL INVENTORY MANAGEMENT

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MEDICAL INVENTORY

MANAGEMENT

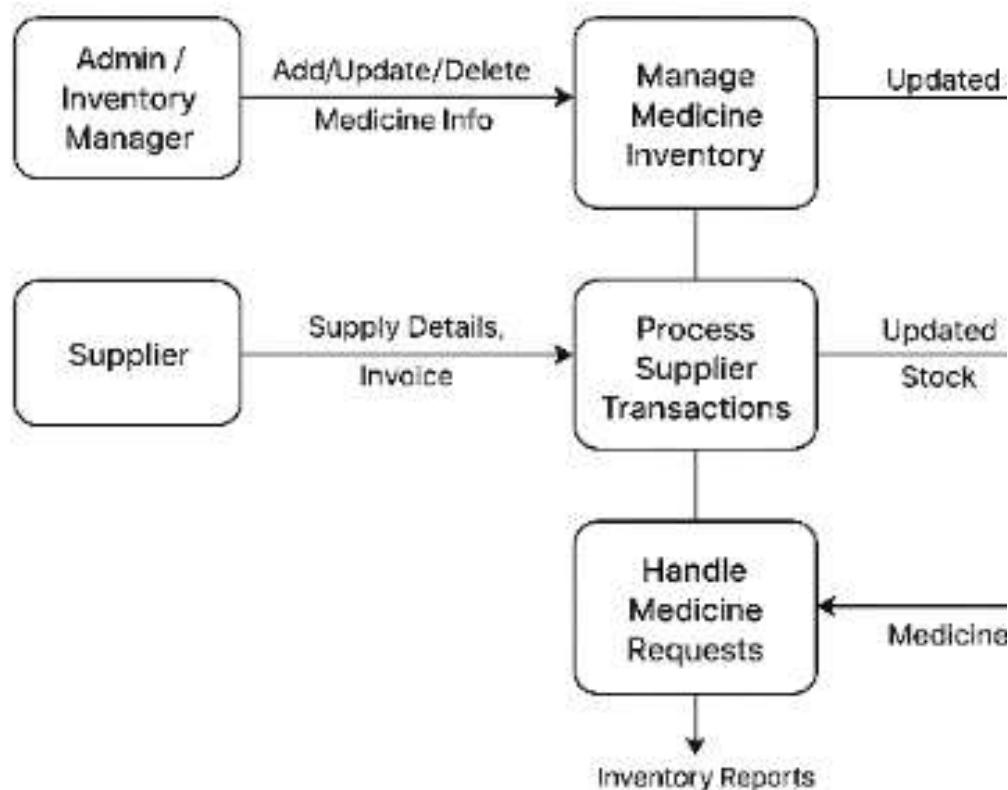
1. INTRODUCTION:

1.1 PROJECT OVERVIEW

The Medical Inventory Management System (MIMS) is designed to help hospitals, clinics, pharmacies, and healthcare providers efficiently manage their medical supplies, drugs, and equipment.

The system automates stock tracking, reduces wastage, prevents stockouts, and ensures compliance with medical regulations.

DATA FLOW DIAGRAM MEDICAL INVENTORY MANAGEMENT PROJ



1.2 PURPOSE

The main objective of the project is to enable organizations to efficiently manage properties, tenants, and medical-related activities. It reduces manual intervention, improves accuracy, and ensures better compliance and communication.

Creating Developer Account:

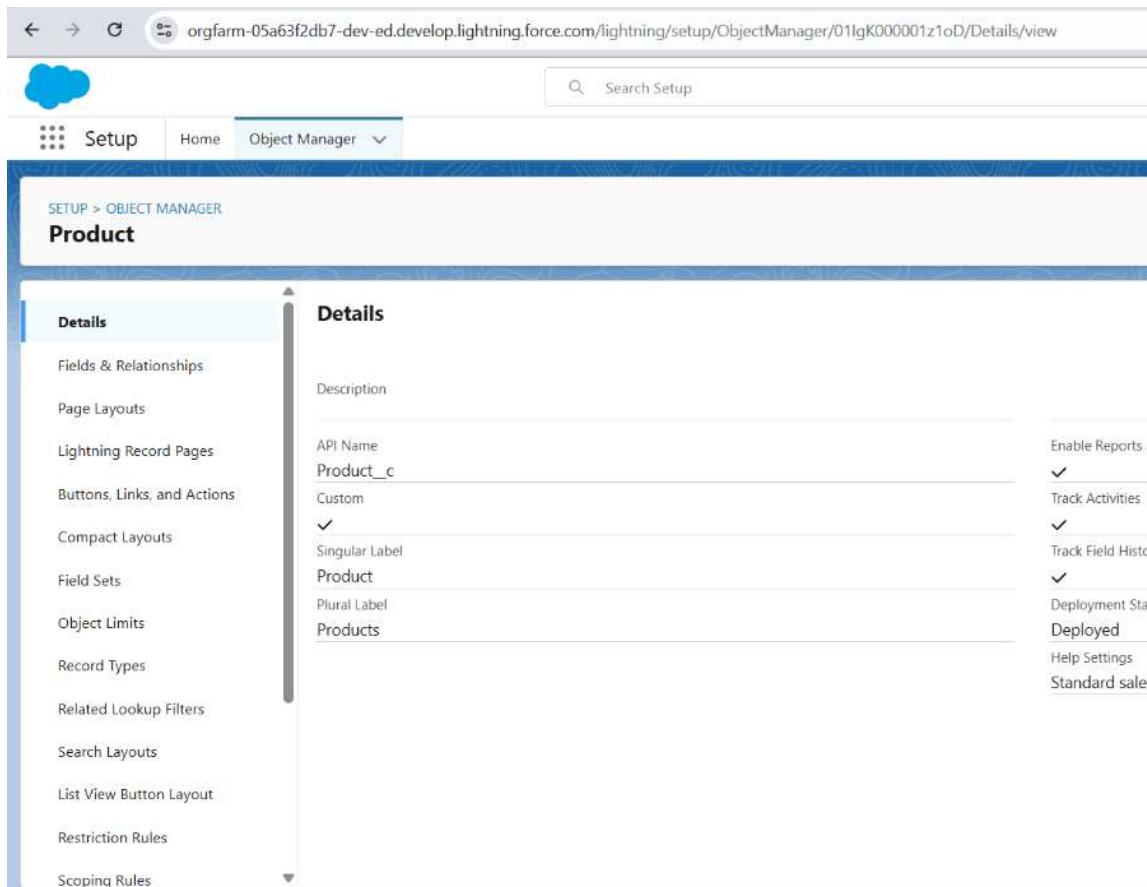
By using this URL- <https://developer.salesforce.com/signup>

The screenshot shows the "Sign up for your Developer Edition" form. The background features a purple gradient with a white cloud icon and two cartoonish AI agents (Agentforce) on the left. The form fields include:

- First name: VINITHA
- Last name: V
- Job title: Developer
- Work email: vvinithavinita69@gmail.com
- Company: Puratchi thalaivyalai
- Country/Region: India

Below the form, there's a note about org provisioning and a checkbox for agreeing to the Main Services Agreement and Salesforce Program Agreement. At the bottom, there's a reCAPTCHA field and a "Sign Me Up" button. The footer contains links for Worldwide, Legal, Terms of Service, Privacy Information, Responsible Disclosure, Trust, Contact, Cookie Preferences, and Your Privacy Choices. A TRUSTe Verified Privacy seal is also present.

- Create objects: Product, Purchase Order, Order Item, Inventory Transaction, Supplier



The screenshot shows the Salesforce Object Manager interface for the 'Product' object. The URL in the browser is `orgfarm-05a63f2db7-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgK000001z1oD/Details/view`. The page title is 'SETUP > OBJECT MANAGER Product'. On the left, a sidebar lists various configuration options under '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, and Scoping Rules. The main content area is titled 'Details' and shows the following fields:

Description	
API Name	<input type="text" value="Product_c"/>
Custom	<input checked="" type="checkbox"/>
Singular Label	<input type="text" value="Product"/>
Plural Label	<input type="text" value="Products"/>
Enable Reports	<input checked="" type="checkbox"/>
Track Activities	<input checked="" type="checkbox"/>
Track Field History	<input checked="" type="checkbox"/>
Deployment Status	<input type="text" value="Deployed"/>
Help Settings	
Standard salesf	

The screenshot shows the Salesforce Object Manager interface. The URL in the browser is <https://orgfarm-05a63f2db7-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001ywes/Details/view>. The page title is "Purchase Orders". The left sidebar lists various configuration options under "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, and Scoping Rules. The main content area displays the "Purchase Order" object details. The API Name is set to "Purchase_Order__c". The object is marked as "Custom" and has a "✓" icon next to it. The Singular Label is "Purchase Orders" and the Plural Label is "purchase Orders". Under the "Enable Reports" section, the "Deployment Status" is listed as "Deployed". The "Help Settings" section shows "Standard sales!".

Setting	Value
Description	
API Name	Purchase_Order__c
Custom	✓
Singular Label	Purchase Orders
Plural Label	purchase Orders
Enable Reports	
Deployment Status	Deployed
Help Settings	Standard sales!

The screenshot shows the Salesforce Object Manager interface. At the top, there is a navigation bar with a back arrow, a refresh icon, and a message "Click to go back, hold to see history". To the right of the message is the URL "05a63f2db7-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001yy5a/Details/view". Below the URL is a blue cloud icon. On the right side of the header is a search bar with the placeholder "Search Setup". The main menu bar has three items: "Setup" (selected), "Home", and "Object Manager". A dropdown arrow is shown next to "Object Manager".

The page title is "SETUP > OBJECT MANAGER" followed by "Order Item".

The left sidebar, titled "Details", lists various configuration options:

- 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

The main content area is titled "Details" and shows the following configuration for the "Order Item" object:

Description	
API Name	Order_Item__c
Custom	✓
Singular Label	Order Item
Plural Label	Order Items
Enable Reports	✓
Track Activities	✓
Track Field History	✓
Deployment Status	Deployed
Help Settings	Standard salesforce

Click to go back, hold to see history 05a63f2db7-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001z0CD/Details/view

The screenshot shows the Salesforce Setup Object Manager page for the 'Inventory Transaction' object. The left sidebar lists various configuration options under the 'Details' tab. The main panel displays the object's details, including its API name, singular and plural labels, and deployment status.

Object Details:

- Description: [Redacted]
- API Name: Inventory_Transaction_c
- Custom: ✓
- Singular Label: Inventory Transaction
- Plural Label: Inventory Transactions

Deployment Status:

- Enable Repc: ✓
- Track Activit: ✓
- Track Field F: ✓
- Deployment: Deployed
- Help Setting: Standard s

Object Configuration Options:

- 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

The screenshot shows the Salesforce Object Manager interface. The URL in the browser is `orafarm-05a63f2db7-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001z0Dp/Details/view`. The page title is "Supplier". The left sidebar lists various configuration options under "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, and Scoping Rules. The main content area displays the "Details" tab for the Supplier object. It includes fields for Description, API Name (Supplier_c), Custom status (checked), Singular Label (Supplier), Plural Label (Suppliers), and several checkboxes for reporting and tracking: Enable Reports (checked), Track Activities (checked), Track Field History (checked), Deployment Status (Deployed), Help Settings, and Standard salesforce.

- Configured Fields and Relationships

The screenshot shows the Salesforce Object Manager Fields & Relationships page for the Product object. The left sidebar lists various setup categories like Page Layouts, Lightning Record Pages, and Field Sets. The main content area displays a table of fields, sorted by Field Label. The table has columns for FIELD LABEL, FIELD NAME, and DATA TYPE.

FIELD LABEL	FIELD NAME	DATA TYPE
Created By	CreatedBy	Lookup(User)
Current Stock Level	Current_Stock_Level_c	Number(18, 0)
Last Modified By	LastModifiedById	Lookup(User)
Minimum Stock Level	Minimum_Stock_Level_c	Number(18, 0)
Owner	OwnerId	Lookup(User,Group)
Product Description	Product_Description__c	Text Area(255)
Product ID	Name	Text(80)
Unit Price	Unit_Price__c	Currency(18, 0)
"Product Name"	Product_Name__c	Text(255)

The screenshot shows the Salesforce Object Manager interface for the 'Purchase Orders' object. The left sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, etc. The main content area displays a table titled 'Fields & Relationships' with 18 items, sorted by Field Label. The table has columns for FIELD LABEL, FIELD NAME, and DATA TYPE.

FIELD LABEL	FIELD NAME	DATA TYPE
Actual Delivery Date	Actual_Delivery_Date_c	Date
Amount	Amount_c	Number(18, 0)
Created By	CreatedById	Lookup(User)
Expected Delivery Date	Expected_Delivery_Date_c	Date
Last Modified By	LastModifiedById	Lookup(User)
Order Count	Order_Count_c	Roll-Up Summary (COUNT Order Item)
Order Date	Order_Date_c	Date
Order Item	Order_Item_c	Text(23)
Owner	OwnerId	Lookup(User,Group)
Product ID	Product_ID_c	Text(32)

The screenshot shows the Salesforce Object Manager Fields & Relationships page for the Order Item object. The URL is orgfarm-05a63f2db7-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001yy5a/FieldsAndRelationships/view. The page title is Order Item. On the left, there's a sidebar with links like 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, and Scoping Rules. The main content area is titled 'Fields & Relationships' and shows 14 items, sorted by Field Label. A table lists the fields:

FIELD LABEL	FIELD NAME	DATA TYPE
Amount	Amount_c	Formula (Currency)
Created By	CreatedById	Lookup(User)
Last Modified By	LastModifiedById	Lookup(User)
Order Item	Order_Item__c	Lookup(Order Item)
Order Item	Name	Text(80)
Order Item ID	Order_Item_ID__c	Text(23)
Product ID	Product_ID_c	Master-Detail(Product ID)
Purchase Order	Purchase_Order__c	Master-Detail(Purchase Orders)
Purchase Order ID	Purchase_Order_ID__c	Lookup(Order Item)

← → ⚙ orgfarm-05a63f2db7-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IgK000001z0CD/FieldsAndRelationships/view

The screenshot shows the Salesforce Setup interface for the 'Inventory Transaction' object. The left sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The main content area displays the 'Fields & Relationships' section with a table showing nine items. The table columns are FIELD LABEL, FIELD NAME, and DATA TYPE.

FIELD LABEL	FIELD NAME	DATA TYPE
Created By	CreatedBy	Lookup(User)
Inventory Transaction	Name	Text(80)
Last Modified By	LastModifiedBy	Lookup(User)
Owner	OwnerId	Lookup(User,Group)
Purchase Order ID	Purchase_Order_ID__c	Text(20)
Total Order Cost	Total_Order_Cost__c	Number(18, 0)
Transaction Date	Transaction_Date__c	Date
Transaction ID	Transaction_ID__c	Text(20)
Transaction Type	Transaction_Type__c	Picklist

Click to go back, hold to see history

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
Supplier

Fields & Relationships		
12 Items, Sorted by Field Label		
FIELD LABEL	FIELD NAME	DATA TYPE
Address	Address_c	Text(24)
Contact Person	Contact_Person_c	Text(24)
Created By	CreatedById	Lookup(User)
Email	Email_c	Email
Email	Emails_c	Email
Last Modified By	LastModifiedById	Lookup(User)
Owner	OwnerId	Lookup(User,Group)
Phone Number	Phone_Number_c	Phone
Phone Number	Phone_Numbers_c	Phone
Supplier ID	Supplier_ID_c	Text(23)

- Creating Tabs for Product, Purchase Order, Order Item, Inventory Transaction, Supplier Objects

The screenshot shows the Salesforce Setup interface with the URL <https://orgfarm-05a63f2db7-dev-ed.lightning.force.com/lightning/setup/CustomTabs/home>. The top navigation bar includes a back arrow, forward arrow, a refresh icon, and a user icon. The main header has a blue cloud icon, the word "Setup", and tabs for "Home" and "Object Manager". A search bar with the placeholder "Search Setup" is located at the top right.

The left sidebar has a "User Interface" section with "Rename Tabs and Labels" and "Tabs" selected. A message below says "Didn't find what you're looking for? Try using Global Search."

The main content area is titled "Custom Tabs" and contains a brief introduction: "You can create new custom tabs to extend Salesforce functionality or to build new application functionality. Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app."

Below this, there are three sections: "Custom Object Tabs", "Web Tabs", and "Visualforce Tabs".

Custom Object Tabs: This section lists five custom object tabs with their labels and styles:

Action	Label	Tab Style
Edit Del	Inventory Transactions	Bridge
Edit Del	Order Items	Airplane
Edit Del	Products	Diamond
Edit Del	Purchase Orders	Circle
Edit Del	Suppliers	Lightning

Web Tabs: This section displays the message: "No Web Tabs have been defined".

Visualforce Tabs: This section displays the message: "No Visualforce Tabs have been defined".

- Developed Lightning App with relevant tabs

← → ⌂ orgfarm-05a63f2db7-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home

Search Setup

New Lightning App

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its tabs.

App Details

* App Name

* Developer Name

Description

App Branding

Image Primary Color

Org Theme Options Use the app's image and color instead of the org theme.

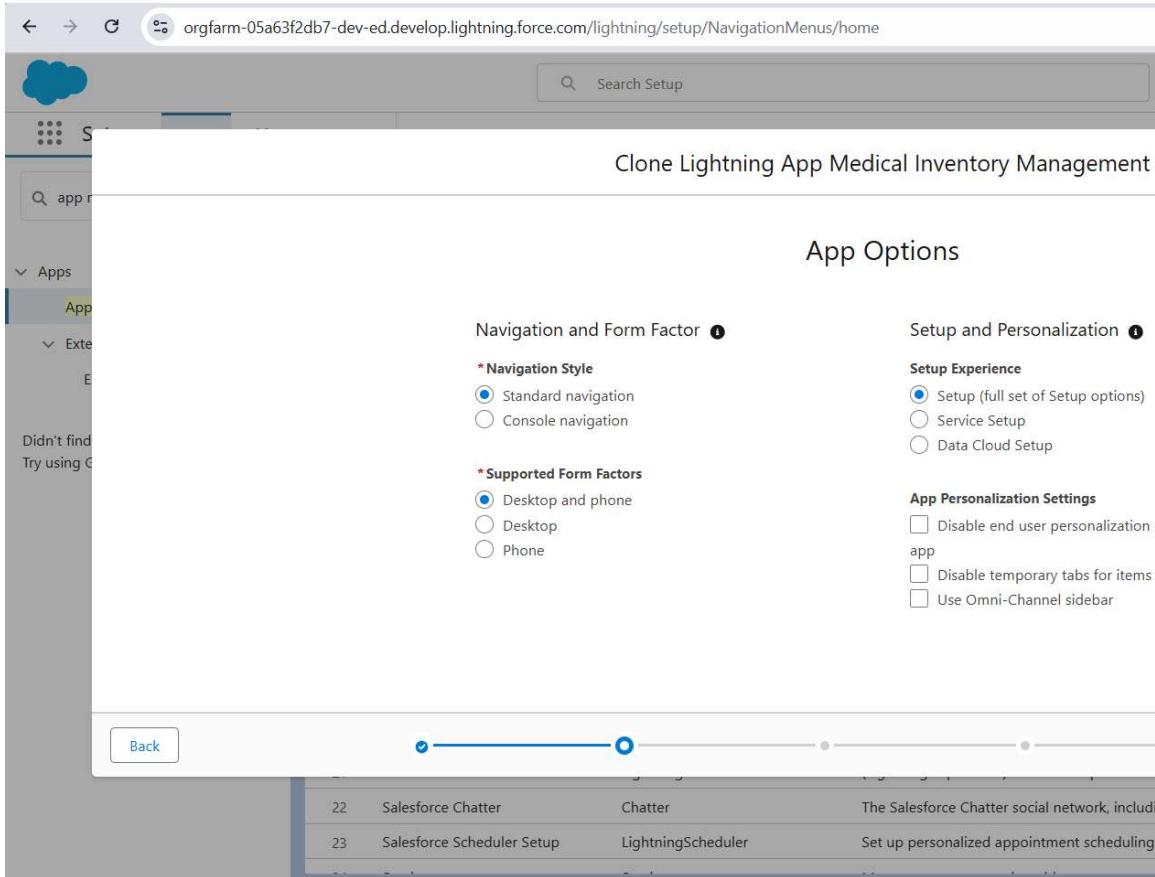
Clear

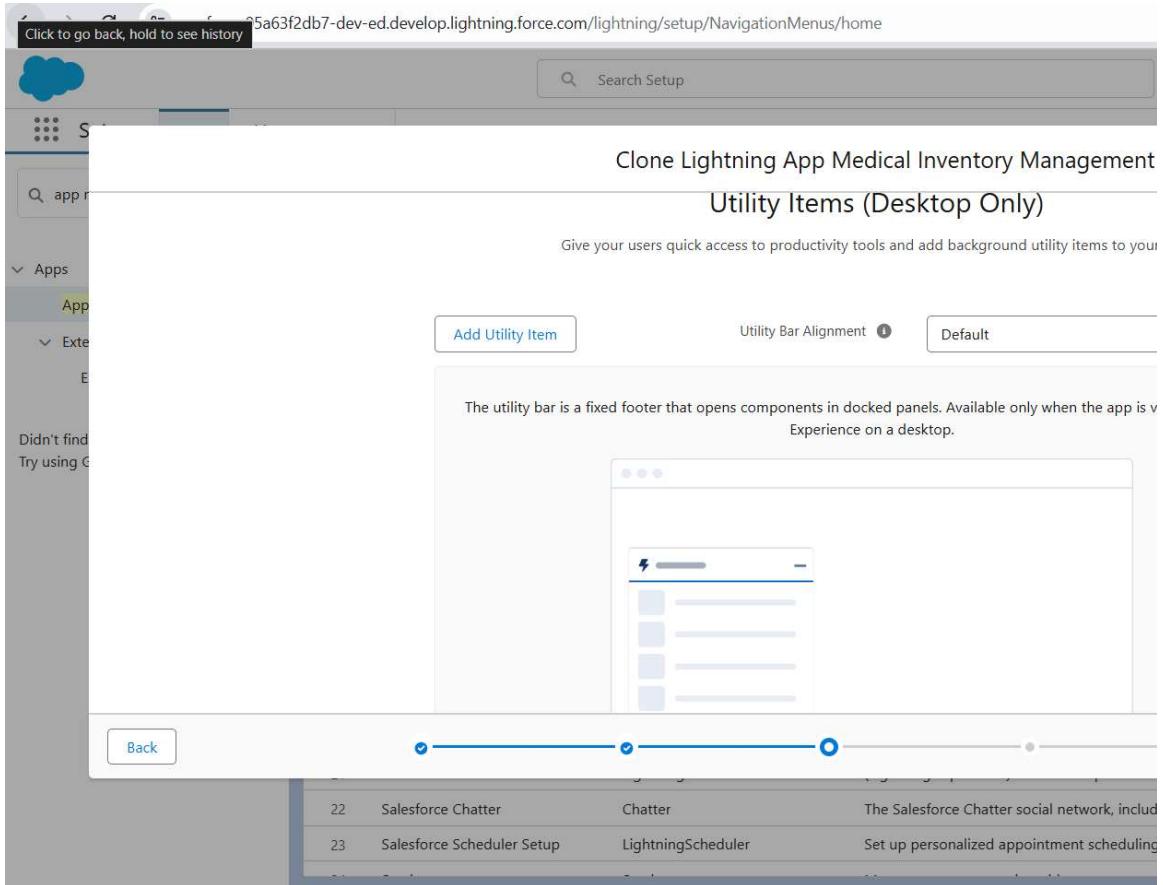
12 Lightning Usage App LightningInstrumentation View Adoption and Usage Metrics for Lightning

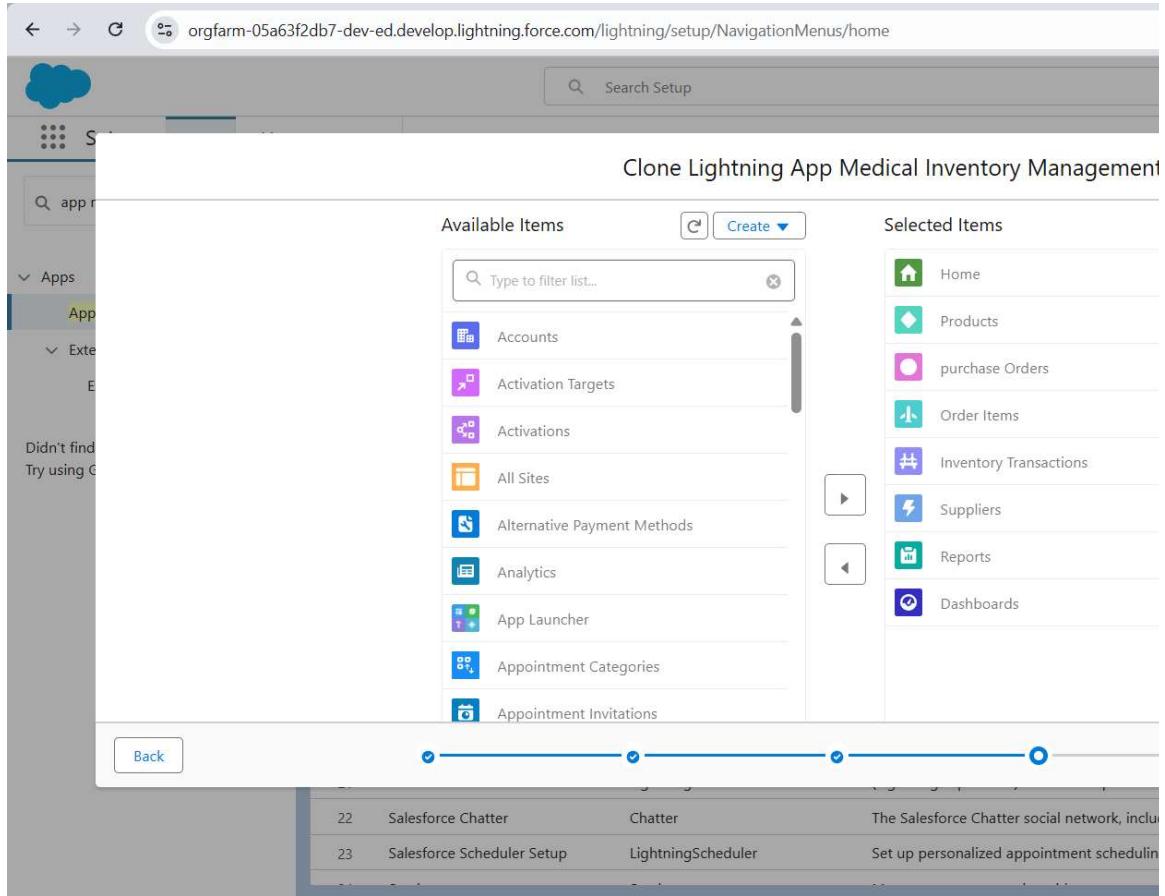
13 Marketing CRM Classic Marketing Track sales and marketing efforts with CRM

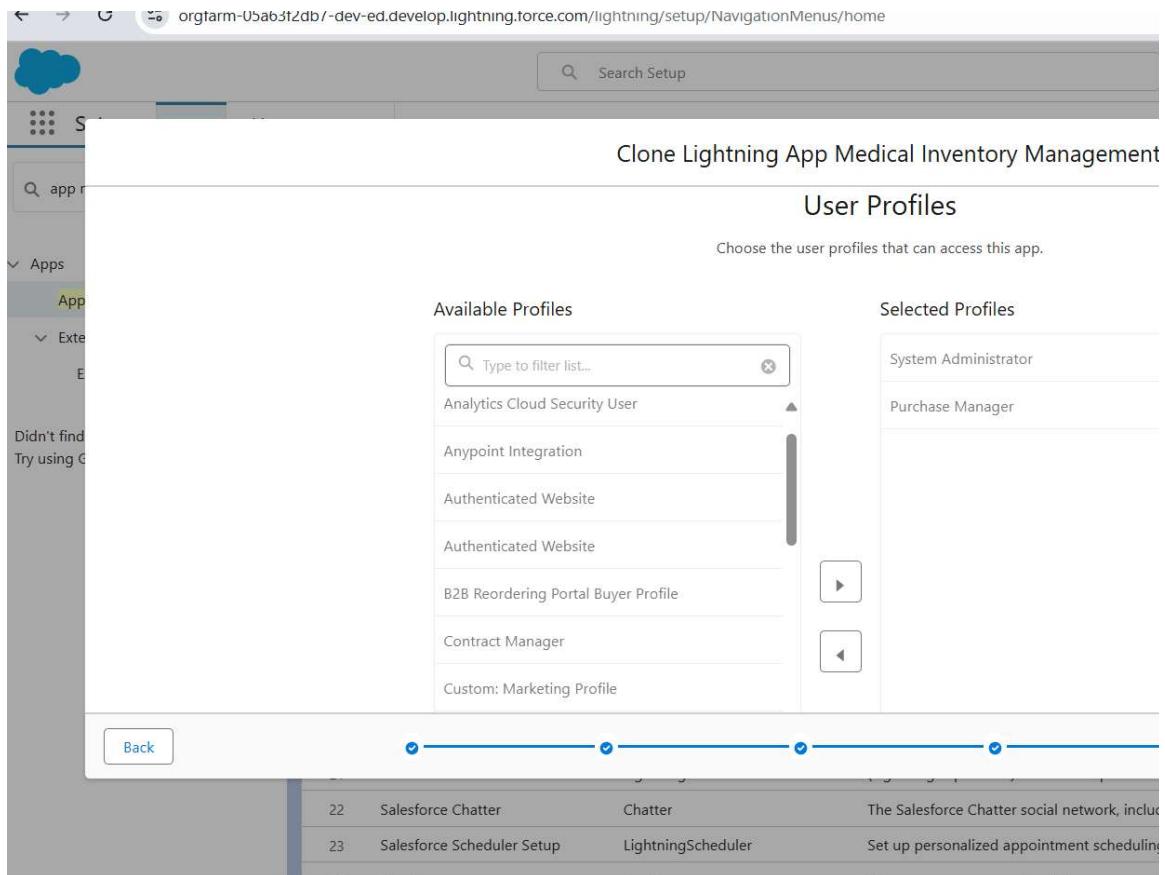
14 Medical Inventory Management Medical_Inventory_Management Medical Inventory Management

	12	Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning
13	Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM	
14	Medical Inventory Management	Medical_Inventory_Management	Medical Inventory Management	









- Creating Text Fields with Product Object

The screenshot shows the Salesforce Setup interface for the Object Manager. The URL is orgfarm-05a63f2db7-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001z1oD/FieldsAndRelationships/new. The page title is 'Product'. The left sidebar lists various setup categories under 'FIELDS & RELATIONSHIPS'. The main content area displays a list of field types with their descriptions. The 'Text' field type is selected, indicated by a blue circle.

Field Type	Description
External Lookup Relationship	The relationship field allows users to click on a lookup icon to select a value from another object. Creates a relationship that links this object to an external object whose data is stored in a different database.
Checkbox	Allows users to select a True (checked) or False (unchecked) value.
Currency	Allows users to enter a dollar or other currency amount and automatically formats it.
Date	Allows users to enter a date or pick a date from a popup calendar.
Date/Time	Allows users to enter a date and time, or pick a date from a popup calendar. Will automatically format the time.
Email	Allows users to enter an email address, which is validated to ensure proper format. Note that custom email addresses cannot be used for mass emails.
Geolocation	Allows users to define locations. Includes latitude and longitude components, and a map.
Number	Allows users to enter any number. Leading zeros are removed.
Percent	Allows users to enter a percentage number, for example, '10' and automatically formats it.
Phone	Allows users to enter any phone number. Automatically formats it as a phone number.
Picklist	Allows users to select a value from a list you define.
Picklist (Multi-Select)	Allows users to select multiple values from a list you define.
Text	Allows users to enter any combination of letters and numbers.
Text Area	Allows users to enter up to 255 characters on separate lines.
Text Area (Long)	Allows users to enter up to 131,072 characters on separate lines.
Text Area (Rich)	Allows users to enter formatted text, add images and links. Up to 131,072 characters.
Text (Encrypted)	Allows users to enter any combination of letters and numbers and store them in an encrypted format.

The screenshot shows the Salesforce Setup interface for managing fields and relationships. The URL in the browser is <https://orgfarm-05a63f2db7-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001z1oD/FieldsAndRelationships/new>. The page title is "Product". The left sidebar lists various configuration options: Details, Fields & Relationships (selected), 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, and Scoping Rules. The main content area is titled "Fields & Relationships" and contains the following settings for the "Product Name" field:

- Field Label:** Product Name
- Length:** 255 (Maximum length for a text field)
- Field Name:** Product_Name
- Description:** Please enter the maximum length for a text field below.
- Help Text:** (Empty)
- 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
- Auto add to custom report type:** Add this field to existing custom report types that contain this entity
- Default Value:** Show Formula Editor

A note at the bottom of the "Default Value" section states: "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".

← → ⌂ ⌂ Click to go back, hold to see history

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER Product

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
- Object Access
- Triggers
- Flow Triggers
- Validation Rules
- Conditional Field Formatting

Master-Detail Relationship

External Lookup Relationship

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

Checkbox

Allows users to select a True (checked) or False (unchecked) value.

Currency

Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount.

Date

Allows users to enter a date or pick a date from a popup calendar.

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 picker, they can also choose a time.

Email

Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a record, it's used for sending mass emails.

Geolocation

Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distances between locations.

Number

Allows users to enter any number. Leading zeros are removed.

Percent

Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.

Phone

Allows users to enter any phone number. Automatically formats it as a phone number.

Picklist

Allows users to select a value from a list you define.

Picklist (Multi-Select)

Allows users to select multiple values from a list you define.

Text

Allows users to enter any combination of letters and numbers.

Text Area

Allows users to enter up to 255 characters on separate lines.

Text Area (Long)

Allows users to enter up to 131,072 characters on separate lines.

Text Area (Rich)

Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.

Text (Encrypted) i

Allows users to enter any combination of letters and numbers and store them in encrypted form.

Time

Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:50.600" are all valid times.

URL

Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

The screenshot shows the Salesforce Object Manager interface for creating a new custom field. The URL in the browser is <https://orgfarm-05a63f2db7-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001z1oD/FieldsAndRelationships/new>. The page title is "Product". On the left, there's a sidebar titled "Fields & Relationships" with various options like Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, etc. The main form is titled "New Custom Field" and is on "Step 2. Enter the details". It has fields for "Field Label" (Product Description), "Field Name" (Product_Description), "Description" (empty), and "Help Text" (empty). Under "Required", there are two checkboxes: "Always require a value in this field in order to save a record" (unchecked) and "Add this field to existing custom report types that contain this entity" (checked). The "Default Value" section contains a "Show Formula Editor" button and a formula syntax help text. At the bottom right of the form is a "Next Step" button.

Product
New Custom Field
Step 2. Enter the details

Field Label: Product Description

Field Name: Product_Description

Description:

Help Text:

Required: Always require a value in this field in order to save a record Add this field to existing custom report types that contain this entity

Default Value: Show Formula Editor

Use formula syntax: Enclose text and picking value API names in double quotes. ("Text", "api"). Include numbers without quotes (10). Show percentages as decimals (.10%). and express date calculations in the standard format: (Today() + 7). To reference a field from a Custom Metadata type record use: \$CustomMetadataType__RecordName__Field__c

Next Step

← → ⌂ orgfarm-05a63f2db7-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001z1oD/FieldsAndRelationships/new

The screenshot shows the Salesforce Object Manager Fields & Relationships page for the 'Product' object. The left sidebar lists various setup categories like Page Layouts, Lightning Record Pages, Buttons, etc. The main content area is titled 'Fields & Relationships' and shows a list of field types with their descriptions and usage details.

Field Type	Description
<input type="radio"/> Lookup Relationship	Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a list.
<input type="radio"/> Master-Detail Relationship	Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the master). The relationship field is required on all detail records. The ownership and sharing of a detail record are determined by the master record. When a user deletes the master record, all detail records are deleted. You can create rollup summary fields on the master record to summarize the detail records.
<input type="radio"/> External Lookup Relationship	Creates a relationship that links this object to an external object whose data is stored outside the Salesforce database. The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object must have a relationship to the external object.
<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.
<input 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 picker, they can also choose a time.
<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 mass email, it is used as the recipient address.
<input type="radio"/> Geolocation	Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance between locations.
<input checked="" type="radio"/> Number	Allows users to enter any number. Leading zeros are removed.
<input type="radio"/> Percent	Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.
<input type="radio"/> Phone	Allows users to enter any phone number. Automatically formats it as a phone number.
<input type="radio"/> Picklist	Allows users to select a value from a list you define.
<input type="radio"/> Picklist (Multi-Select)	Allows users to select multiple values from a list you define.
<input type="radio"/> Text	Allows users to enter any combination of letters and numbers.
<input type="radio"/> Text Area	Allows users to enter up to 255 characters on separate lines.
<input type="radio"/> Text Area (Long)	Allows users to enter up to 131,072 characters on separate lines.
<input type="radio"/> Text Area (Rich)	Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.
<input type="radio"/> Text (Encrypted) <small>(i)</small>	Allows users to enter any combination of letters and numbers and store them in encrypted form.
<input type="radio"/> Time	Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:50.000" are all valid times.
<input type="radio"/> URL	Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

Click to go back, hold to see history



Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
Product

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
- Object Access
- Triggers
- Flow Triggers
- Validation Rules
- Conditional Field Formatting

New Custom Field

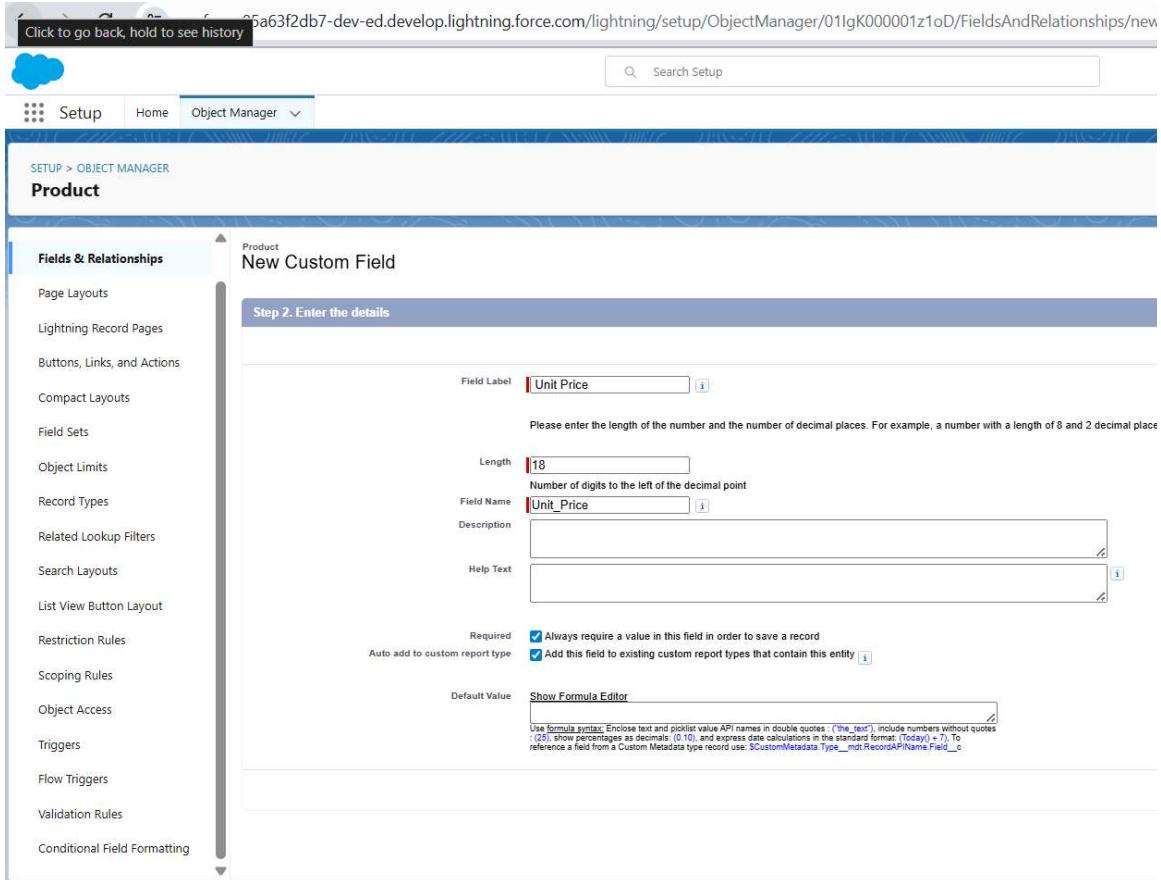
Step 2. Enter the details

Field Label	<input type="text" value="Current Stock Level"/> <small>i</small>
Please enter the length of the number and the number of decimal places. For example, a number with a length of 8 and 2 decimal place	
Length	<input type="text" value="18"/>
Number of digits to the left of the decimal point	
Field Name	<input type="text" value="Current_Stock_Level"/> <small>i</small>
Description	<input type="text"/>
Help Text	<input type="text"/>
Required	<input type="checkbox"/> Always require a value in this field in order to save a record
Unique	<input type="checkbox"/> Do not allow duplicate values
External ID	<input type="checkbox"/> Set this field as the unique record identifier from an external system
AI Prediction	<input type="checkbox"/> Use this field to store AI prediction scores
Auto add to custom report type	<input checked="" type="checkbox"/> Add this field to existing custom report types that contain this entity <small>i</small>
Default Value	<input type="text" value="Show Formula Editor"/> <small>i</small>
<small>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__not.Records@Name.Field__c</small>	

Click to go back, hold to see history

The screenshot shows the Salesforce Setup Object Manager interface. The left sidebar lists various configuration categories under 'Fields & Relationships'. The main content area displays a table of field types, each with a description and a list of bullet points. The table includes columns for the field type name, description, and bullet points.

Field Type	Description	Bullet Points
External Lookup Relationship	Creates a relationship that links this object to an external object whose data is stored outside the Salesforce organization.	<ul style="list-style-type: none"> The relationship field is required on all detail records. The ownership and sharing of a detail record are determined by the master record. When a user deletes the master record, all detail records are deleted. You can create rollup summary fields on the master record to summarize the detail records.
Currency	Allows users to select a True (checked) or False (unchecked) value.	<ul style="list-style-type: none"> Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount.
Date	Allows users to enter a date or pick a date from a popup calendar.	<ul style="list-style-type: none"> Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the picker, they can choose a time.
Date/Time	Allows users to enter a date and time, or pick a date from a popup calendar.	
Email	Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a message header, it is included in the message's envelope.	
Geolocation	Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance between locations.	
Number	Allows users to enter any number. Leading zeros are removed.	
Percent	Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.	
Phone	Allows users to enter any phone number. Automatically formats it as a phone number.	
Picklist	Allows users to select a value from a list you define.	
Picklist (Multi-Select)	Allows users to select multiple values from a list you define.	
Text	Allows users to enter any combination of letters and numbers.	
Text Area	Allows users to enter up to 255 characters on separate lines.	
Text Area (Long)	Allows users to enter up to 131,072 characters on separate lines.	
Text Area (Rich)	Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.	
Text (Encrypted)	Allows users to enter any combination of letters and numbers and store them in encrypted form.	
Time	Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:50.600" are all valid times.	
URL	Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.	



- Creating fields in Purchase Order Object

The screenshot shows the Salesforce Setup interface for creating a new custom field. The URL is orgfarm-05a63f2db7-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IgK000001ywes/FieldsAndRelationships/new. The page title is "Purchase Orders". The left sidebar under "Fields & Relationships" is expanded, showing various layout-related options. The main content area is titled "Purchase Orders New Custom Field" and "Step 1. Choose the field type". It asks to specify the type of information the custom field will contain. The "Data Type" section is active, showing "None Selected" as the current choice. Other options include Auto Number, Formula, Roll-Up Summary, Lookup Relationship (selected), Master-Detail Relationship, External Lookup Relationship, Checkbox, Currency, Date, Date/Time, and Email. Each option has a detailed description below it.

Purchase Orders
New Custom Field

Step 1. Choose the field type

Specify the type of information that the custom field will contain.

Data Type

None Selected Select one of the data types below.

Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented each time a new record is created.

Formula A read-only field that derives its value from a formula expression you define. The formula field is updated whenever the formula changes.

Roll-Up Summary A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of a related list.

Lookup Relationship Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a list of related records.

Master-Detail Relationship Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the master). The relationship field is required on all detail records.

- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

External Lookup Relationship The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object must have a relationship to an external object whose data is stored outside the Salesforce database.

Checkbox Allows users to select a True (checked) or False (unchecked) value.

Currency Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount.

Date Allows users to enter a date or pick a date from a popup calendar.

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 picker, they can also choose a time.

Email Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for mass emails, the validation occurs when the message is sent.

The screenshot shows the Salesforce Object Manager interface for creating a new relationship between the Purchase Order object and another object. The URL in the browser is <https://orgfarm-05a63f2db7-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01gK000001ywes/FieldsAndRelationships/new>. The page title is "Purchase Orders". On the left, there's a sidebar with a "Fields & Relationships" section containing various layout and rule options. The main content area is titled "Purchase Orders New Relationship" and "Step 2. Choose the related object". A dropdown menu labeled "Related To" has "Supplier" selected. A search bar at the top right says "Search Setup".

The screenshot shows the Salesforce Object Manager interface. The URL in the browser is <https://orgfarm-05a63f2db7-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001ywes/FieldsAndRelationships/new>. The page title is "Purchase Orders". On the left, there's a sidebar with "Fields & Relationships" selected. The main content area is titled "New Relationship" and "Step 3. Enter the label and name for the lookup field". It shows fields for "Field Label" (Supplier ID), "Field Name" (Supplier_ID), "Description", and "Help Text". Below these, under "Required", is a checked checkbox for "Always require a value in this field in order to save a record". Under "What to do if the lookup record is deleted?", there are two options: "Clear the value of this field. You can't choose this option if you make this field required." (unchecked) and "Don't allow deletion of the lookup record that's part of a lookup relationship." (checked). At the bottom, there are checkboxes for "Auto add to custom report type" and "Add this field to existing custom report types that contain this entity". A "Lookup Filter" section is also present.

Purchase Orders

Fields & Relationships

- Master-Detail Relationship
- External Lookup Relationship
- Checkbox
- Currency
- Date
- Date/Time
- Email
- Geolocation
- Number
- Percent
- Phone
- Picklist
- Picklist (Multi-Select)
- Text
- Text Area
- Text Area (Long)
- Text Area (Rich)
- Text (Encrypted) i
- Time
- URL

The screenshot shows the Salesforce Object Manager interface for creating a new custom field on the Purchase Orders object. The URL in the browser is <https://orgfarm-05a63f2db7-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001ywes/FieldsAndRelationships/new>. The page title is "Purchase Orders". The left sidebar under "Fields & Relationships" lists various layout-related options. The main form is titled "New Custom Field" and is on "Step 2. Enter the details". The field label is "Order Count" and the field name is "Order_Count". There is a checkbox "Auto add to custom report type" which is checked, and another checkbox "Add this field to existing custom report types that contain this entity" which is also checked.

The screenshot shows the Salesforce Setup interface for the Object Manager. The URL in the address bar is <https://orgfarm-05a63f2db7-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgK000001ywes/FieldsAndRelationships/new>. The page title is "Purchase Orders". On the left, there's a sidebar with various setup categories like Details, Fields & Relationships, Page Layouts, etc. The main content area is titled "Purchase Orders New Custom Field" and "Step 1. Choose the field type". It asks to specify the type of information the custom field will contain. Under "Data Type", "None Selected" is selected. Other options include Auto Number, Formula, Roll-Up Summary (which is selected), Lookup Relationship, Master-Detail Relationship, and External Lookup Relationship. Each option has a detailed description below it.

Purchase Orders
New Custom Field

Step 1. Choose the field type

Specify the type of information that the custom field will contain.

Data Type

None Selected Select one of the data types below.

Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented.

Formula A read-only field that derives its value from a formula expression you define. The formula field is updated whenever the formula changes.

Roll-Up Summary A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of a related list.

Lookup Relationship Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a list.

Master-Detail Relationship Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the master). The relationship field is required on all detail records.

External Lookup Relationship The relationship field allows users to click on a lookup icon to select a value from a list.

Checkbox Allows users to select a True (checked) or False (unchecked) value.

Currency Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount.

Date Allows users to enter a date or pick a date from a calendar.

Date/Time Allows users to enter a date and time, or pick a date from a calendar. When users click a date in the picker, they can also choose a time.

Email Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for mass emails.

Click to go back, hold to see history 05a63f2db7-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001ywes/FieldsAndRelationships/new

The screenshot shows the Salesforce Setup interface for creating a new custom field. The URL in the address bar is `05a63f2db7-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001ywes/FieldsAndRelationships/new`. The page title is "Purchase Orders". The left sidebar under "Fields & Relationships" is expanded, showing various options like 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, Object Access, Triggers, Flow Triggers, and Validation Rules. The main content area is titled "Purchase Orders New Custom Field" and "Step 3. Define the summary calculation". It shows the "Select Object to Summarize" section where "Purchase Orders" is the Master Object and "Order Items" is the Summarized Object. Under "Select Roll-Up Type", "COUNT" is selected. A "Field to Aggregate" dropdown is set to "None". In the "Filter Criteria" section, the radio button for "All records should be included in the calculation" is selected.

The screenshot shows the Salesforce Object Manager setup page for the Purchase Orders object. On the left, a sidebar lists various configuration options under 'Fields & Relationships'. The main area is titled 'New Relationship' and 'Step 3. Enter the label and name for the lookup field'. The configuration includes:

- Field Label:** Supplier ID
- Field Name:** Supplier_ID
- Description:** (empty)
- Help Text:** (empty)
- Child Relationship Name:** purchase_Orders1
- Required:** Always require a value in this field in order to save a record
- What to do if the lookup record is deleted?**
 - 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.
- Auto add to custom report type:** Add this field to existing custom report types that contain this entity

Below this, there is a 'Lookup Filter' section with a note: 'Optional, create a filter to limit the records available to users in the lookup field.' and a link 'Tell me more!'. A 'Show Filter Settings' button is also present.

- Creating fields in Order Item Object

The screenshot shows the Salesforce Setup interface for creating a new custom field. The URL in the browser is <https://orgfarm-05a63f2db7-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgK000001yy5a/FieldsAndRelationships/new>. The page title is "Order Item". The left sidebar is titled "Fields & Relationships" and lists various layout-related options. The main content area is titled "New Custom Field" and "Step 1. Choose the field type". It asks to specify the type of information the custom field will contain. The "Data Type" section shows several options: "None Selected" (selected), "Auto Number", "Formula" (selected), "Roll-Up Summary", "Lookup Relationship", and "Master-Detail Relationship". Each option has a detailed description and a note about its relationship to other objects.

SETUP > OBJECT MANAGER
Order Item

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

Order Item
New Custom Field

Step 1. Choose the field type

Specify the type of information that the custom field will contain.

Data Type

None Selected Select one of the data types below.

Auto Number A system-generated sequence number that uses a display format you define. 1

Formula A read-only field that derives its value from a formula expression you define. TI

Roll-Up Summary 1 A read-only field that displays the sum, minimum, or maximum value of a field in another object.

Lookup Relationship Creates a relationship that links this object to another object. The relationship field is required on both sides of the relationship. 1

Master-Detail Relationship 1 Creates a special type of parent-child relationship between this object (the child) and another object (the master).

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the values of detail records.

The relationship field allows users to click on a lookup icon to select a value from another object.

The screenshot shows the Salesforce Object Manager setup page for the 'Order Item' object. The URL is <https://orgfarm-05a63f2db7-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001yy5a/FieldsAndRelationships/new>. The page title is 'SETUP > OBJECT MANAGER Order Item'. On the left, a sidebar lists various setup categories under 'Fields & Relationships'. The main content area is titled 'Step 2. Choose output type' and shows a field labeled 'Unit Price' with a currency symbol. A checkbox 'Add this field to existing custom report types that contain this entity' is checked. Below this, a section titled 'Formula Return Type' lists several options: None Selected (selected), Checkbox, Currency (selected), Date, Date/Time, Number, Percent, and Text. Each option has a brief description and example code.

SETUP > OBJECT MANAGER
Order Item

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

Step 2. Choose output type

Field Label

Auto add to custom report type Add this field to existing custom report types that contain this entity [?](#)

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.
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 a
Example: `Next = NOW() + 1`

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

Percent Calculate a percent and automatically add the percent sign to the number.
Example: `Discount = (Amount - Discounted_Amount_c) / Amount`

Text Create a text string, for example, by concatenating other text fields.
Example: `Full Name = LastName & ", " & FirstName`