

A CRM APPLICATION TO ENGINEERING WORKS

Milestone 1-Salesforce developer account creation:

Task 1-Creating Developer Account:

Creating a developer org in salesforce.

Go to <https://developer.salesforce.com/signup>

Join the Agentforce Hackathon on Nov. 18-19 to compete for a \$20,000 Grand Prize. [Sign up now](#)

Sign up for your Salesforce Developer Edition
A Salesforce Platform environment for free.

Complete the form to get access to the Salesforce Developer Edition.

First Name*
Your first name

Last Name*
Your last name

Email*
Your email address

Role*
Your job role

Company*
Provide a name

On the sign up form, enter the following details :

First name & Last name

Email

Role : Developer

Company : College or Company Name

County : India

Postal Code : pin code

Username : should be a combination of your name and company

Join the Agentforce Hackathon on Nov. 18-19 to compete for a \$20,000 Grand Prize. [Sign up now](#)

Sign up for your Salesforce Developer Edition
A Salesforce Platform environment for free.

Complete the form to get access to the Salesforce Developer Edition.

First Name*
Goyatiri

Last Name*
P

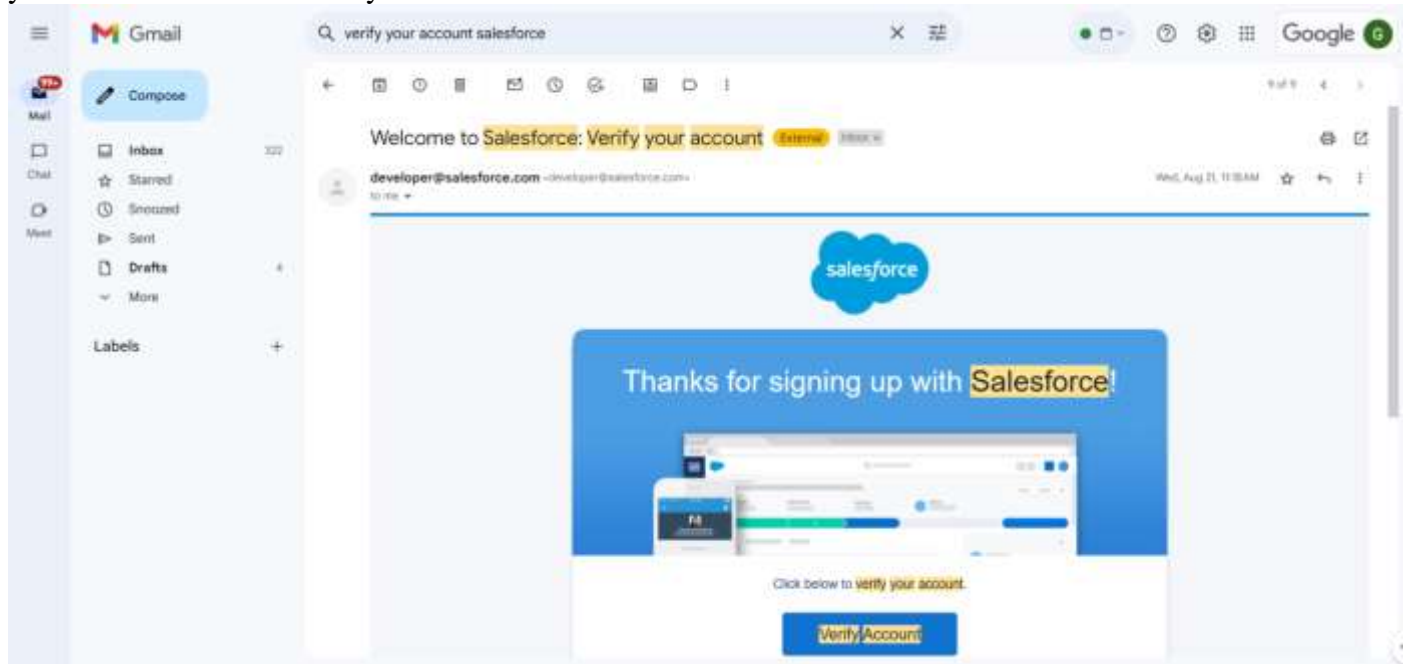
Email*
goya.71772117501@gct.ac.in

Role*
Developer

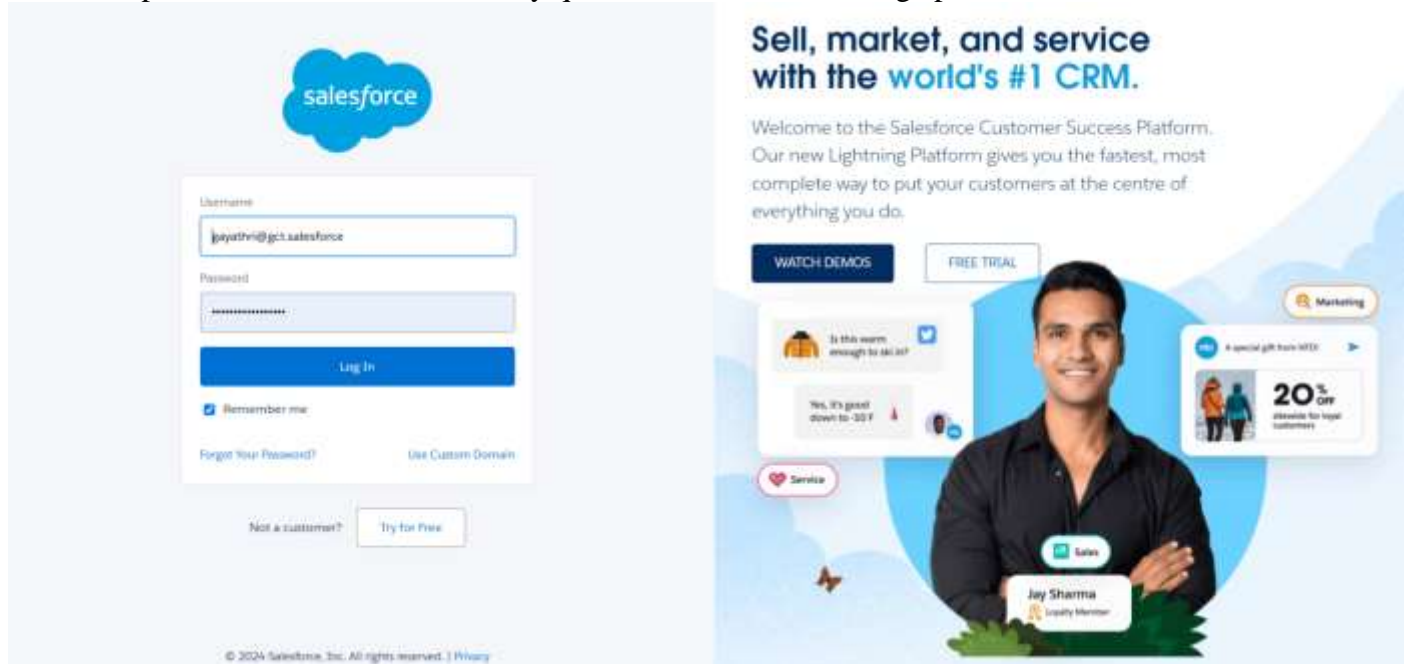
Company*
Government College of Technology

Task-2: Account Activation:

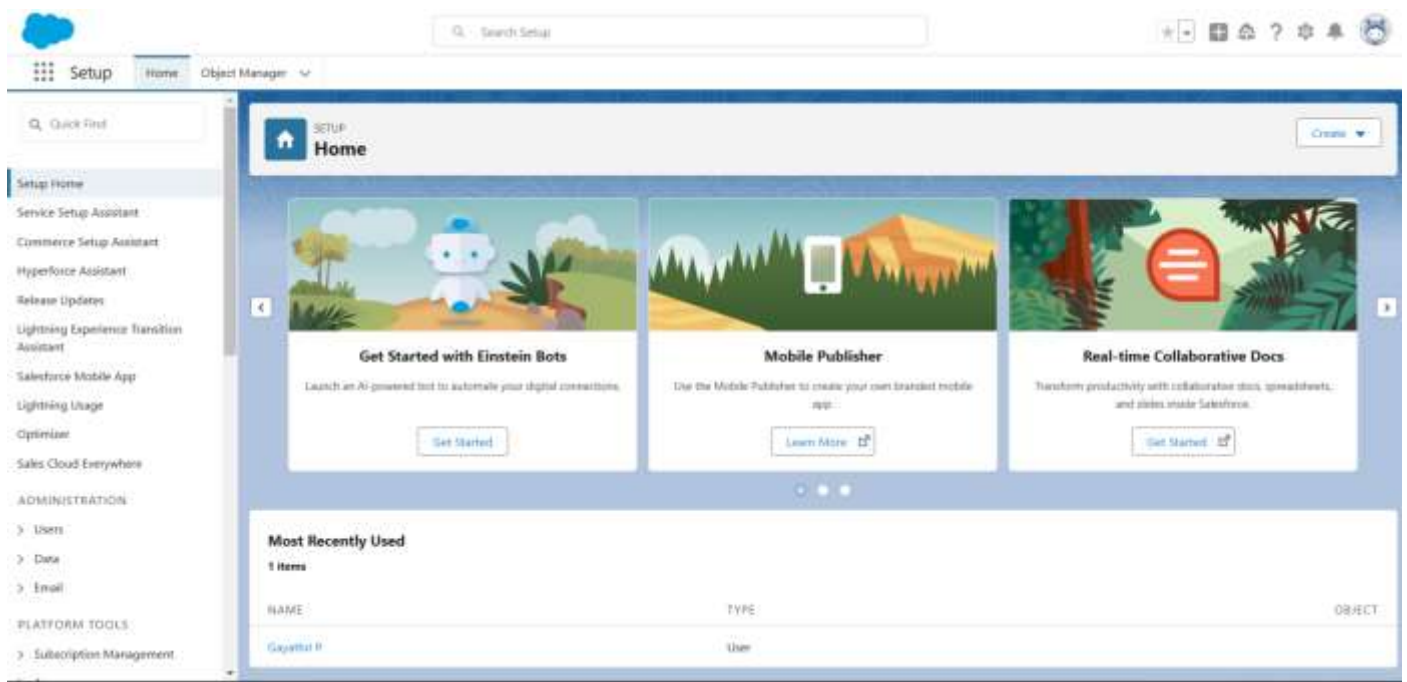
Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins.



1. Click on Verify Account:
2. Give a password and answer a security question and click on change password.
3. Give a password and answer a security question and click on change password.



4. Then you will redirect to your salesforce setup page.

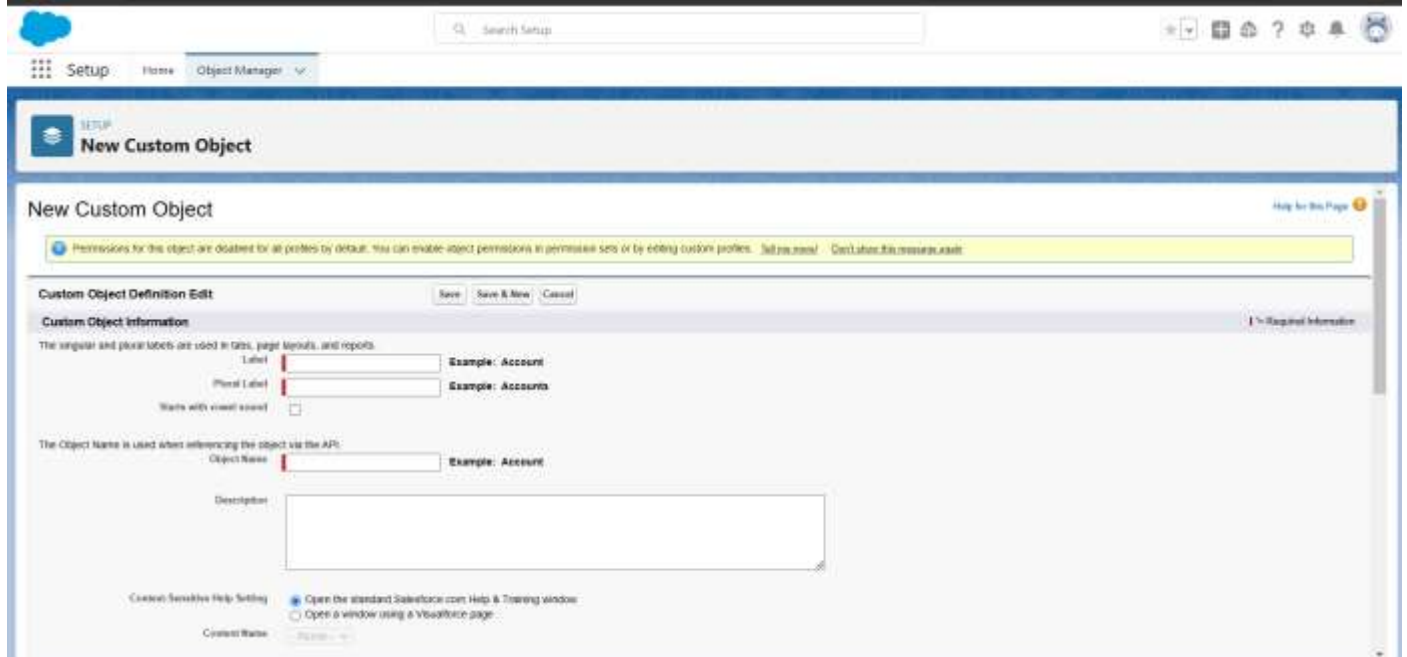


Milestone 2- Object :

Task1: Create Fabrication Object

To create an object:

From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.



Enter the label name>> Fabrication

Plural label name >> Fabrications

The screenshot shows the 'New Custom Object' page in Salesforce Setup. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager'. Below this, the page title is 'New Custom Object'. A yellow banner at the top states: 'Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more!](#) [Don't show this message again](#)'. The main section is 'Custom Object Definition Edit' with buttons for 'Save', 'Save & New', and 'Cancel'. Under 'Custom Object Information', there's a note: 'The singular and plural labels are used in tabs, page layouts, and reports.' It includes fields for 'Label' (Fabrication), 'Plural Label' (Fabrications), and 'Object Name' (Fabrication), each with an 'Example' (Account, Accounts, Account respectively). There's also a 'Description' text area and a 'Custom Sensitive Help Setting' section with two radio buttons: 'Open the standard Salesforce.com Help & Training window' (selected) and 'Open a window using a Visualforce page'. A 'Custom Name' field is at the bottom.

Enter Record Name Label and Format

Record Name >> Fabrication Name

Data Type >> Text

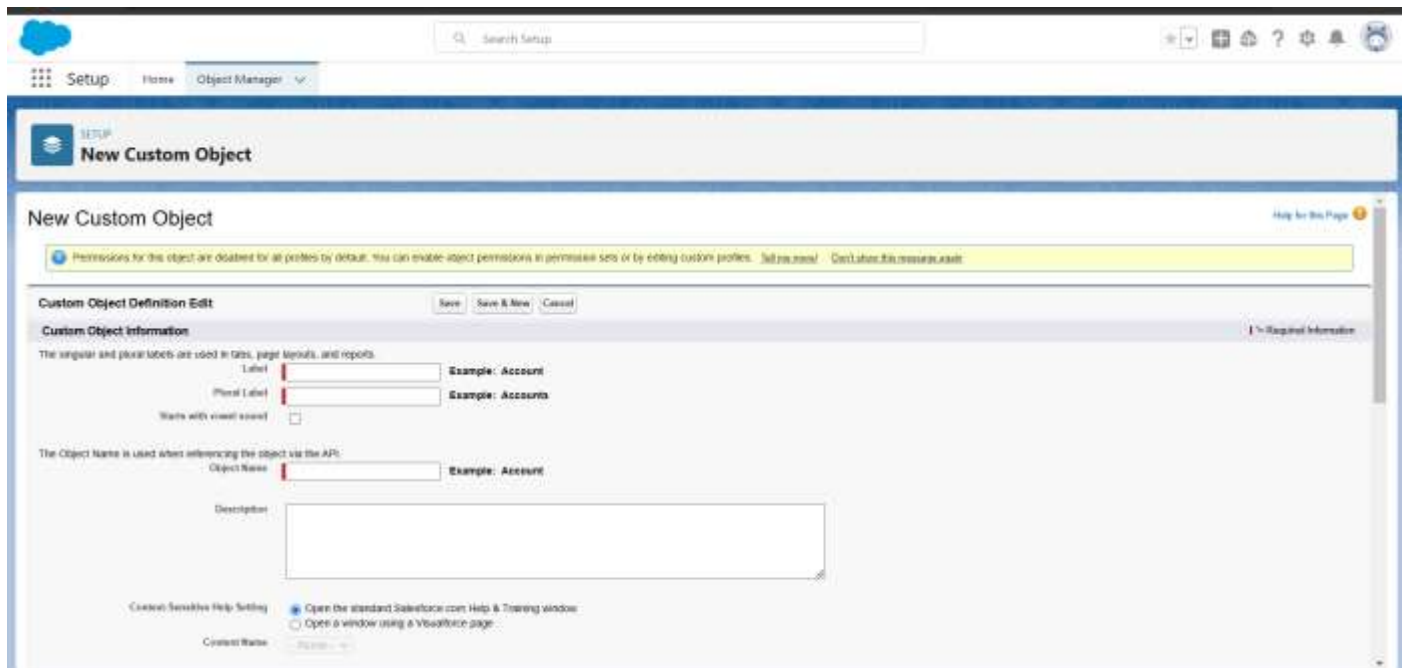
Click on Allow reports and Track Field History, Allow Activities

Allow search >> Save.

This screenshot shows the 'Enter Record Name Label and Format' section of the 'New Custom Object' page. It includes a note: 'The Record Name appears in page layouts, key tabs, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.' The 'Record Name' field contains 'Fabrication Name' with an example of 'Account Name'. The 'Data Type' is set to 'Text', with a warning: 'Warning: If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.' Below this are several sections: 'Optional Features' with checkboxes for 'Allow Reports' (checked), 'Allow Activities' (checked), 'Track Field History' (checked), 'Allow in Chatter Groups' (unchecked), and 'Enable Learning' (unchecked); 'Object Classification' with checkboxes for 'Allow Sharing' (checked), 'Allow Bulk API Access' (checked), and 'Allow Streaming API Access' (checked); 'Deployment Status' with radio buttons for 'In Development' (unchecked) and 'Deployed' (checked); and 'Search Status' with a note: 'When this setting is enabled, your users can find records of this object type when they search. [Learn more](#).' There's also a 'What's New?' link on the right.

Task 2-To create an object:

From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.



Setup Home Object Manager

New Custom Object

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Set permissions](#) [Don't show this message again](#)

Custom Object Definition Edit Save Save & New Cancel

Custom Object Information 1 Required Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label Example: Account

Plural Label Example: Accounts

Starts with vowel sound ☐

The Object Name is used when referencing the object via the API.

Object Name Example: Account

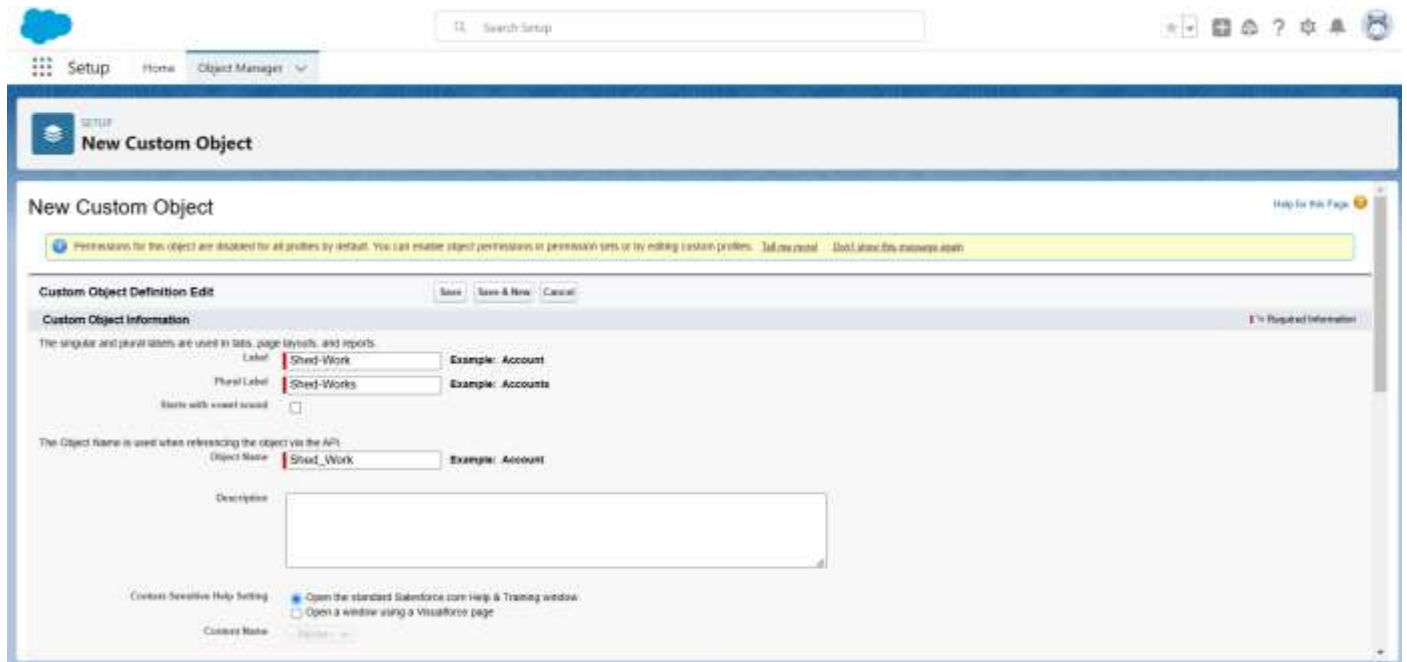
Description

Custom Sensitive Help Setting ☒ Open the standard Salesforce.com Help & Training window ☐ Open a window using a Visualforce page

Custom Name

Enter the label name >> Shed-Work

Plural label name >> Shed Works



Setup Home Object Manager

New Custom Object

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Set permissions](#) [Don't show this message again](#)

Custom Object Definition Edit Save Save & New Cancel

Custom Object Information 1 Required Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label Example: Account

Plural Label Example: Accounts

Starts with vowel sound ☐

The Object Name is used when referencing the object via the API.

Object Name Example: Account

Description

Custom Sensitive Help Setting ☒ Open the standard Salesforce.com Help & Training window ☐ Open a window using a Visualforce page

Custom Name

Enter Record Name Label and Format

Record Name >> Shed Work Name

Data Type >> Text

Click on Allow reports and Track Field History, Allow Activities

Allow search >> Save.

Setup Home **Object Manager**

NEW Custom Object

Enter Record Name Label and Format

The Record Name appears in page layouts, key tabs, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name: **Example: Account Name**

Default Type: **Warning:** If you plan to insert a high volume of records in this object, via the API for example, use the "Id" data type.

Optional Features

- ☒ Allow Reports
- ☒ Allow Activities
- ☒ Track Field History
- ☐ Allow in Chatter Groups
- ☐ Enable Learning

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more.](#)

- ☒ Allow Sharing
- ☒ Allow Bulk API Access
- ☒ Allow Streaming API Access

Deployment Status [What's New?](#)

☐ In Development

☒ Deployed

Search Status

When this setting is enabled, your users can find records of this object type when they search. [Learn more.](#)

Task-3: Create Pipe Lining Object

To create an object:

From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.

Setup Home **Object Manager**

NEW Custom Object

[Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. \[Get the details.\]\(#\) \[Consultation this resource available.\]\(#\)](#)

Custom Object Definition Edit [Save](#) [Save & New](#) [Cancel](#)

Custom Object Information [Help for this Page](#)

The singular and plural labels are used in tabs, page layouts, and reports.

Label: **Example: Account**

Plural Label: **Example: Accounts**

Starts with capital letter: ☐

The Object Name is used when referencing the object via the API.

Object Name: **Example: Account**

Description:

Context Sensitive Help Setting: ☒ Open the standard Salesforce.com Help & Training window

☐ Open a window using a Visualforce page

Content Rules: [Manage](#)

Enter the label name >> Pipe Lining

Plural label name >> Pipe Linings

The screenshot shows the 'New Custom Object' page in Salesforce Setup. The page has a header with 'Setup', 'Home', and 'Object Manager'. Below the header, there's a section titled 'New Custom Object' with a sub-section 'Custom Object Definition Edit'. The 'Custom Object Information' section is highlighted, showing fields for 'Label' (Pipe Lining), 'Plural Label' (Pipe Linings), 'Object Name' (Pipe_Lining), and 'Description'. There are also checkboxes for 'Starts with instant record' and 'Customize this object's help settings'. A yellow banner at the top states: 'Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more](#) [Go to object permissions](#).' A red error message on the right says '1 Required Information'.

Enter Record Name Label and Format

Record Name >> Pipe Lining Name

Data Type >> Text

Click on Allow reports and Track Field History, Allow Activities

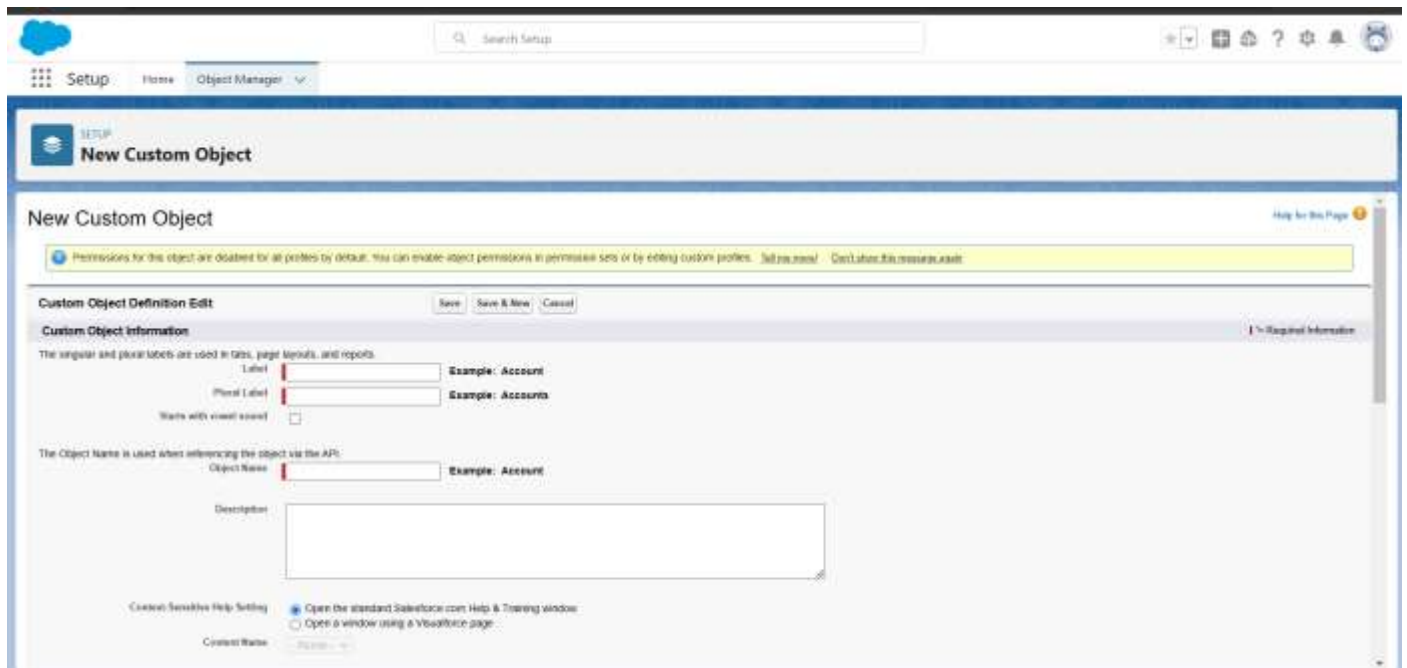
Allow search >> Save.

The screenshot shows the 'New Custom Object' page in Salesforce Setup, specifically the 'Enter Record Name Label and Format' section. The 'Record Name' field is set to 'Fabrication Name' with an example of 'Account Name'. The 'Data Type' is set to 'Text'. Below this, the 'Optional Features' section has checkboxes for 'Allow Reports', 'Allow Activities', 'Track Field History', 'Allow in Chatter Groups', and 'Enable Licensing'. The 'Object Classification' section has checkboxes for 'Allow Sharing', 'Allow Bulk API Access', and 'Allow Streaming API Access'. The 'Deployment Status' section has checkboxes for 'In Development' and 'Deployed'. The 'Search Status' section has a checkbox for 'When this setting is enabled, your users can find records of this object type when they search.' A yellow banner at the top states: 'Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more](#) [Go to object permissions](#).' A red error message on the right says '1 Required Information'.

Task-4:create Worker Object

To create an object:

From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.



Setup Home Object Manager

New Custom Object

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Set permissions](#) [Don't show this message again](#)

Custom Object Definition Edit Save Save & New Cancel

Custom Object Information Required Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label Example: Account

Plural Label Example: Accounts

Starts with vowel sound ☐

The Object Name is used when referencing the object via the API.

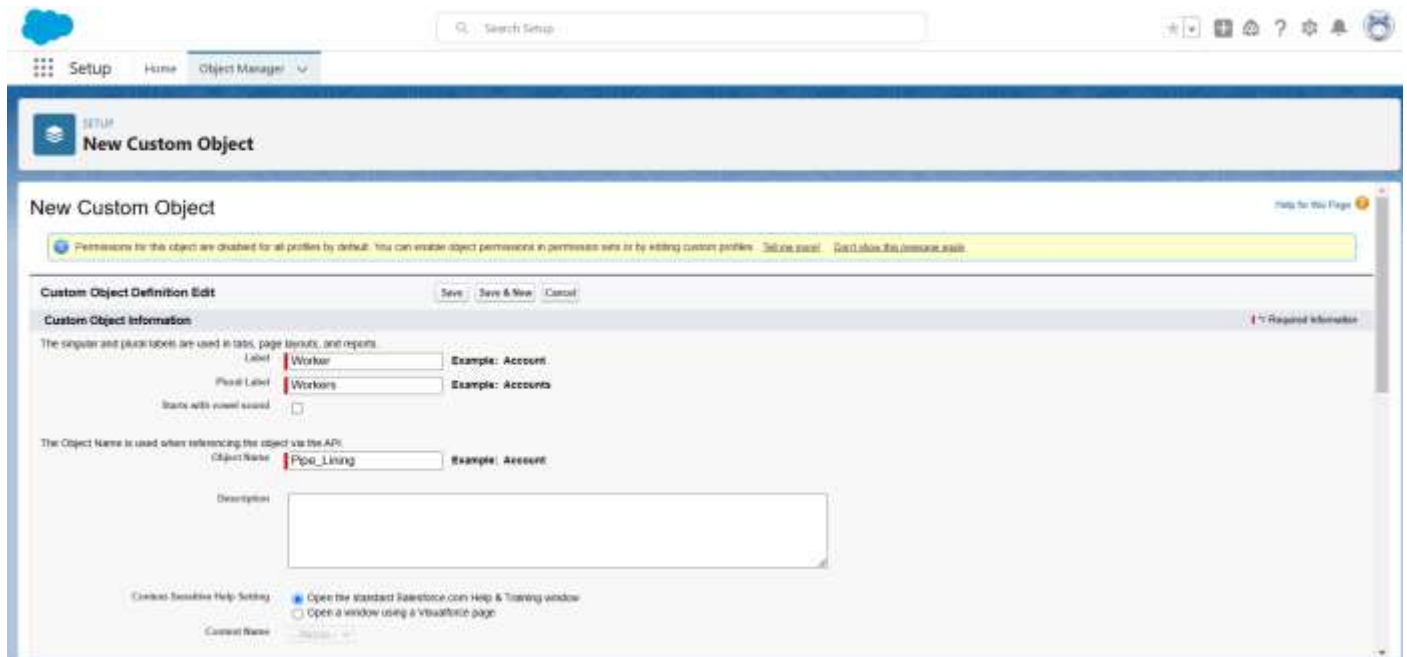
Object Name Example: Account

Description

Context Sensitive Help Setting ☒ Open the standard Salesforce.com Help & Training window ☐ Open a window using a Visualforce page

Custom Name

Enter the label name >> Worker
Plural label name >> Workers



Setup Home Object Manager

New Custom Object

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Set permissions](#) [Don't show this message again](#)

Custom Object Definition Edit Save Save & New Cancel

Custom Object Information Required Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label Example: Account

Plural Label Example: Accounts

Starts with vowel sound ☐

The Object Name is used when referencing the object via the API.

Object Name Example: Account

Description

Context Sensitive Help Setting ☒ Open the standard Salesforce.com Help & Training window ☐ Open a window using a Visualforce page

Custom Name

Enter Record Name Label and Format
Record Name >> Worker Name
Data Type >> Text
Click on Allow reports and Track Field History, Allow Activities
Allow search >> Save.

Setup Home **Object Manager**

NEW
New Custom Object

Enter Record Name Label and Format
The Record Name appears in page layouts, key tabs, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.
Record Name: **Example: Account Name**
Case Type: **Warning:** If you plan to insert a high volume of records in this object, via the API for example, use the "Id" data type.

Optional Features
☒ Allow Reports
☒ Allow Actions
☒ Track Field History
☐ Allow in Chatter Groups
☐ Enable Learning (L)

Object Classification
When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more.](#)
☒ Allow Sharing
☒ Allow Bulk API Access
☒ Allow Streaming API Access

Deployment Status [What's this?](#)
☐ In Development
☒ Deployed

Search Status
When this setting is enabled, your users can find records of this object type when they search. [Learn more.](#)

Milestone 3- Tabs:

What is Tab : A tab is like a user interface that is used to build records for objects and to view the records in the objects.

Creating a Custom Tab

To create a Tab:(Fabrication)

Go to setup page >> type Tabs in Quick Find bar >> click on tabs >> New (under custom object tab)

Setup Home **Object Manager**

tab

Feature Settings
 Analytics
 Tables
 Tables Embedding
 Decision Tables
 User Interface
 Loaded Console Tab Links
 Rename Tabs and Labels
Tab

Didn't find what you're looking for? Try using Global Search.

SETUP
Tabs

New Custom Object Tab [Help for this Page](#)

Step 1: Enter the Details **Step 1 of 2**

Choose the custom object for this new custom tab. Fill in other details.

New Custom Object Tab **1/1 Required Information**

Select an existing custom object or [create a new custom object now.](#)
 Object:
 Tab Style:

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.
 Splash Page Custom Link:

Enter a short description:
 Description:

Next **Cancel**

Select Object(Fabrication) >> Select the tab style >> Next (Add to profiles page) keep it as default >> Next (Add to Custom App) uncheck the include tab .

Make sure that the Append tab to users' existing personal customizations is checked.

Click save.

The screenshot shows the Salesforce Setup interface. The left sidebar contains a search bar and a navigation menu with categories like Feature Settings, Analytics, User Interface, and Tabs. The main content area is titled 'SETUP Tabs' and displays 'Step 1: Add to Custom Apps'. Below this, a list of custom apps is shown with checkboxes to select or exclude tabs for each. The apps listed include Platform, Sales, Service, Marketing CRM Console, Sample Console, High Volume Customer Portal User, Authenticated Website User, App Launcher, Community, Site.com, Salesforce Chatter, Content, Analytics Studio, and Sales Console.

Custom App	Exclude Tab
Platform (standard__Platform)	<input type="checkbox"/>
Sales (standard__Sales)	<input type="checkbox"/>
Service (standard__Service)	<input type="checkbox"/>
Marketing CRM Console (standard__Marketing)	<input type="checkbox"/>
Sample Console (standard__ServiceConsole)	<input type="checkbox"/>
High Volume Customer Portal User	<input type="checkbox"/>
Authenticated Website User	<input type="checkbox"/>
App Launcher (standard__AppLauncher)	<input type="checkbox"/>
Community (standard__Community)	<input type="checkbox"/>
Site.com (standard__Site)	<input type="checkbox"/>
Salesforce Chatter (standard__Chatter)	<input type="checkbox"/>
Content (standard__Content)	<input type="checkbox"/>
Analytics Studio (standard__Insights)	<input type="checkbox"/>
Sales Console (standard__LightningSalesConsole)	<input type="checkbox"/>

Task-2: Creating Remaining Tabs

Now create the Tabs for the remaining Objects, they are “Shed-Work, Pipe lining, Worker”.

The screenshot shows the Salesforce Setup interface for creating a new custom object tab. The left sidebar is the same as the previous screenshot. The main content area is titled 'New Custom Object Tab' and displays 'Step 1: Enter the Details'. Below this, a form is shown for configuring the new tab. The form includes a dropdown to select an existing custom object (currently set to 'Shed-Work'), a dropdown for the tab type (currently set to 'Factory'), an optional dropdown for a home page custom link (currently set to 'None'), and a text area for a short description.

New Custom Object Tab

Select an existing custom object or create a new custom object:

Object: **Shed-Work**

Tab type: **Factory**

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab:

Splash Page Custom Link: **None**

Enter a short description:

Description:

Milestone 4 : The Lightning App

Task-1:

Create a Lightning App

To create a lightning app page:

Go to setup page >> search “app manager” in quick find >> select “app manager” >> click on New lightning App.

App Name	App Type	Description	Last Updated	Status
Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	21/08/2024, 11:12 am	Classic
Platform	Platform	The fundamental Lightning Platform	21/08/2024, 11:12 am	Classic
Guest Management	Guest Management	Create and manage guests for your business	21/08/2024, 11:12 am	Lightning

2. Fill the app name in app details and branding as follow

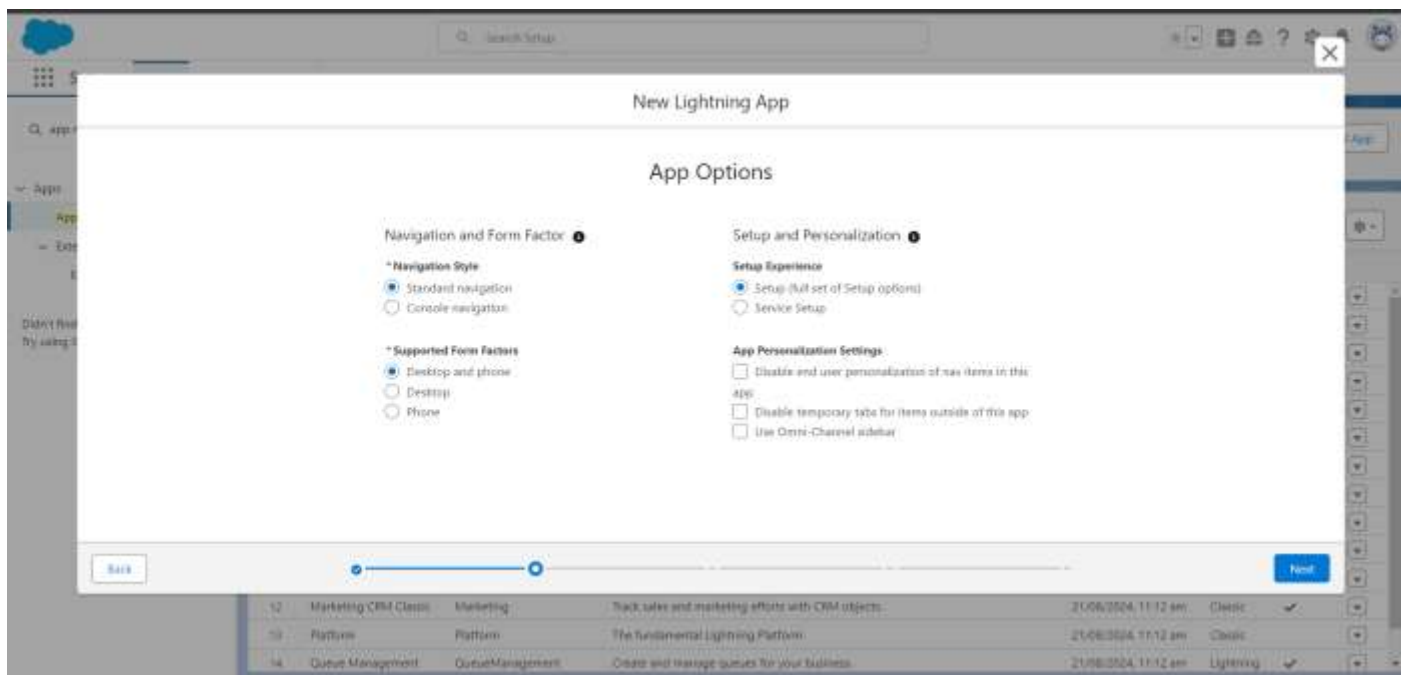
App Name : Engineering Works

Developer Name : This will auto populated

Image : optional (if you want to give any image you can otherwise not mandatory) Primary color hex value : keep this default.

App Name	App Type	Description	Last Updated	Status
Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	21/08/2024, 11:12 am	Classic
Platform	Platform	The fundamental Lightning Platform	21/08/2024, 11:12 am	Classic
Guest Management	Guest Management	Create and manage guests for your business	21/08/2024, 11:12 am	Lightning

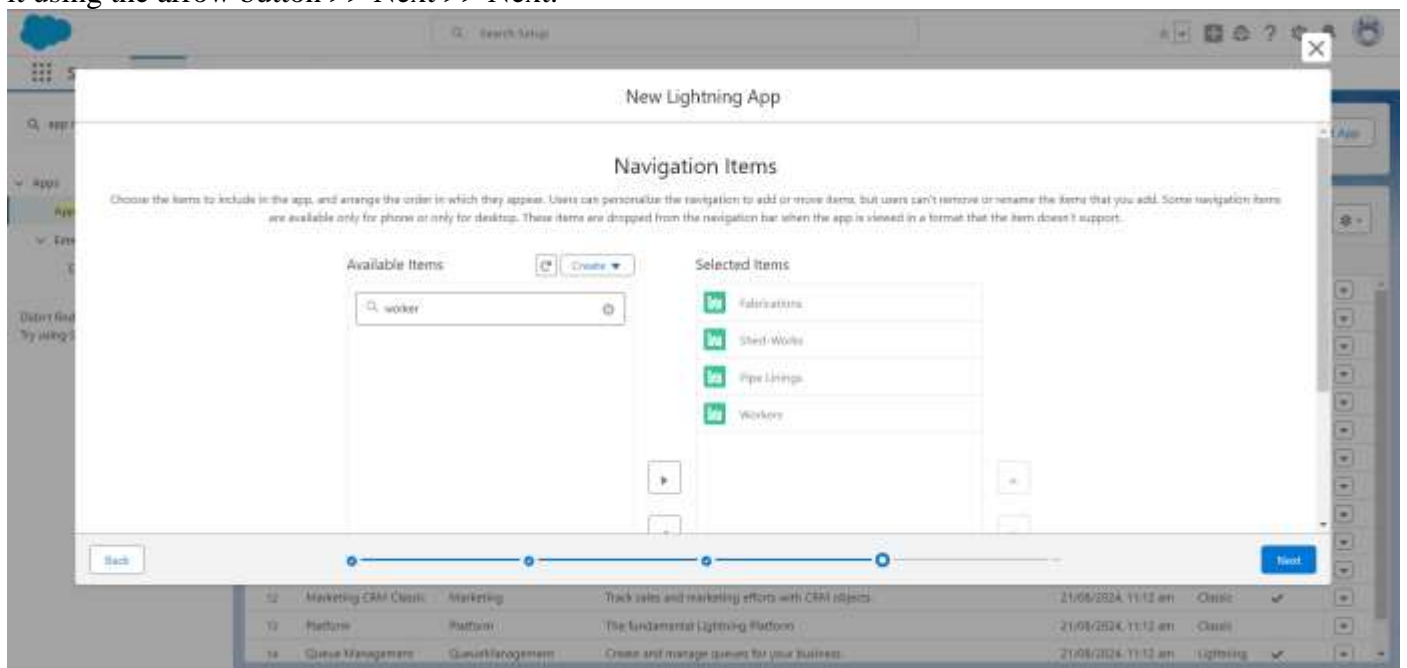
3. Then click Next >> (App option page) Set Navigation Style as Standard Navigation >> Next.



5. (Utility Items) keep it as default >> Next.

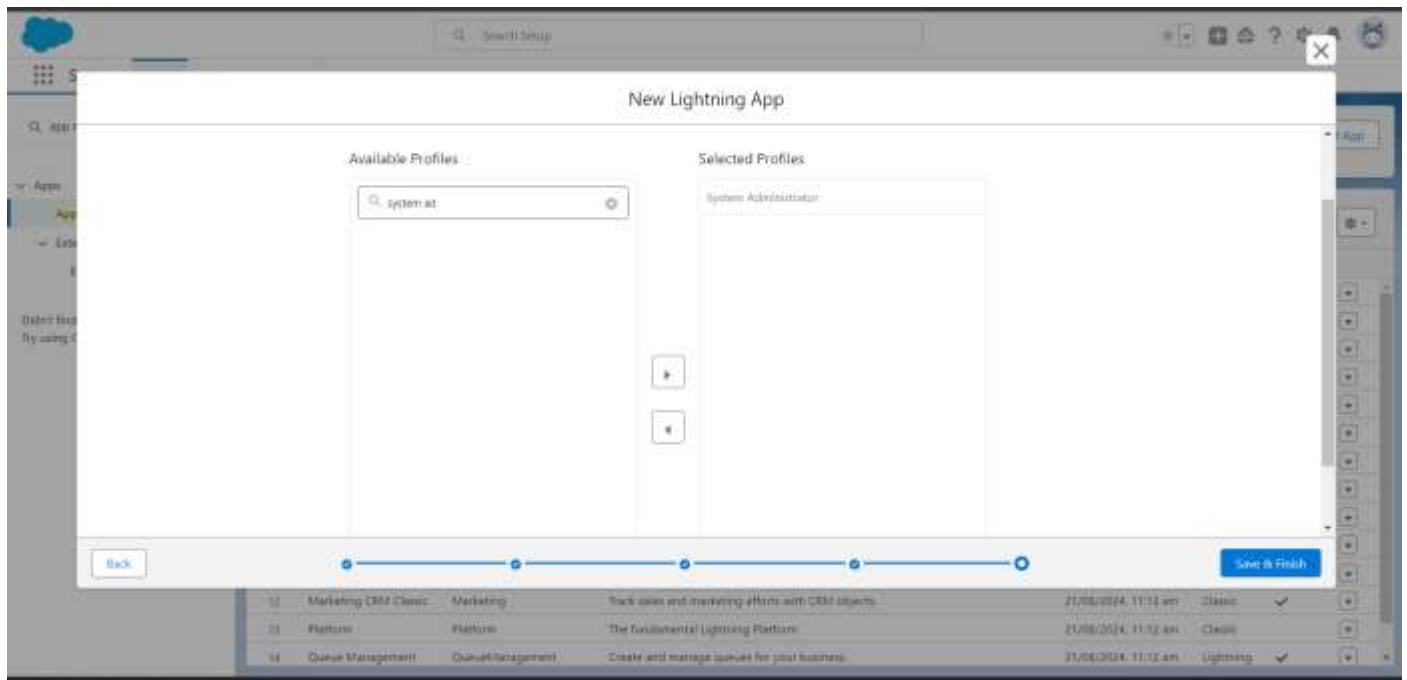
5. To Add Navigation Items:

Search for the item in the (Fabrications, Shed Works, Pipe Linings, Workers) from the search bar and move it using the arrow button >> Next >> Next.



6. To Add User Profiles:

Search profiles (System administrator) in the search bar >> click on the arrow button >> save & finish.

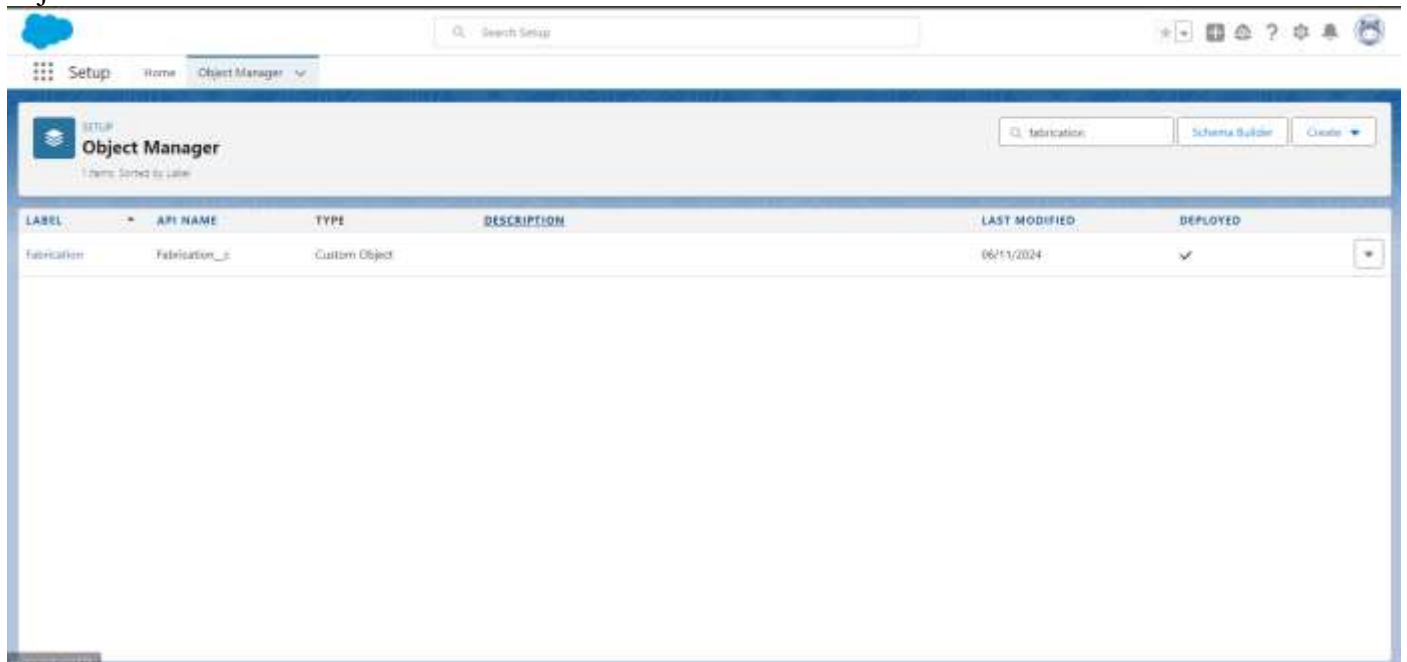


Milestone 5 : Fields

Task-1:Creation of fields for the Fabrication object

To create fields in an object:

Go to setup >> click on Object Manager >> type object name(Fabrication) in search bar >> click on the object.



Now click on “Fields & Relationships” >> New

SETUP > OBJECT MANAGER

Fabrication

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

Fabrication: 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 for each new record.

☐ Formula

A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

☐ 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 all records listed in 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 popup list. The other object is the source of the values in the list.

☐ Master Detail Relationship

Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- 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.

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

Next Cancel

Select Data Type as a "Text"

SETUP > OBJECT MANAGER

Fabrication

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

Fabrication: New Custom Field

Step 1: Choose the field type

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

Data Type

☐ Currency

Allows users to enter a number or enter currency amount and automatically formats the value as a currency amount. This field is useful if you export data to CSV or another spreadsheet.

☐ 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 pop-up, that date and the current time are entered into the Date/Time field.

☐ 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 emails.

☐ Geolocation

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

☐ Number

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

☐ Percent

Allows users to enter a percentage number, for example, "12" 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, "2:45 PM", "14:45", "14:45:00", and "14:45:50.680" are all valid times for this field.

☐ URL

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

Next Cancel

Click on next

Setup - OBJECT MANAGER
Fabrication

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Links
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules

Fabrication: New Custom Field

Step 2: Enter the details

Field Label

Length

Field Name

Description

Help Text

Required ☐ Always requires a value in this field in order to save a record
Unique ☐ Do not allow duplicate values
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

Previous Next Cancel

5. Fill the Above as following:

Field Label: Name of the Owner

Field Name : Name_of_the_Owner

Length : 125

Required :check box

Click on Next >> Next >> Save and new.

Setup - OBJECT MANAGER
Fabrication

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Links
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules

Fabrication: New Custom Field

Step 3: Enter the details

Field Label: Name of the Owner

Length: 125

Field Name: Name_of_the_Owner

Description

Help Text

Required ☒ Always requires a value in this field in order to save a record
Unique ☐ Do not allow duplicate values
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

Previous Next Cancel

To create another fields in an object:

Go to setup >> click on Object Manager >> type object name(Fabrication) in search bar >> click on the object.

Now click on “Fields & Relationships” >> New
Select Data type as a “Text” and Click on Next

SETUP > OBJECT MANAGER
Fabrication

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Links
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules

☐ Date
☐ DateTime
☐ Email
☐ Geolocation
☐ Number
☐ Percent
☐ Phone
☐ Picklist
☐ Picklist (Multi-Select)
☒ Text
☐ Text Area
☐ Text Area (Long)
☐ Text Area (Rich)
☐ Text (Encrypted)
☐ Time
☐ URL

Allows users to enter a date or pick a date from a pop-up calendar.
Allows users to enter a date and time, or pick a date from a pop-up calendar. When users click a date in the pop-up, that date and the current time are entered into the DateTime field.
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 or Email. Note that custom email addresses cannot be used for mass emails.
Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
Allows users to enter any number. Leading zeros are removed.
Allows users to enter a percentage number, for example, "10" and automatically adds the percent sign to the number.
Allows users to enter any phone number. Automatically formats it as a phone number.
Allows users to select a value from a list you define.
Allows users to select multiple values from a list you define.
Allows users to enter any combination of letters and numbers.
Allows users to enter up to 255 characters on separate lines.
Allows users to enter up to 131,072 characters on separate lines.
Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.
Allows users to enter any combination of letters and numbers and store them in encrypted form.
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 for this field.
Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

Next Cancel

Fill the Above as following:

Field Label : Name of Company

Field Name : Name_of_Company

Click on Next >> Next >> Save and new.

SETUP > OBJECT MANAGER
Fabrication

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Links
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules

3 Items, Sorted by Field Label

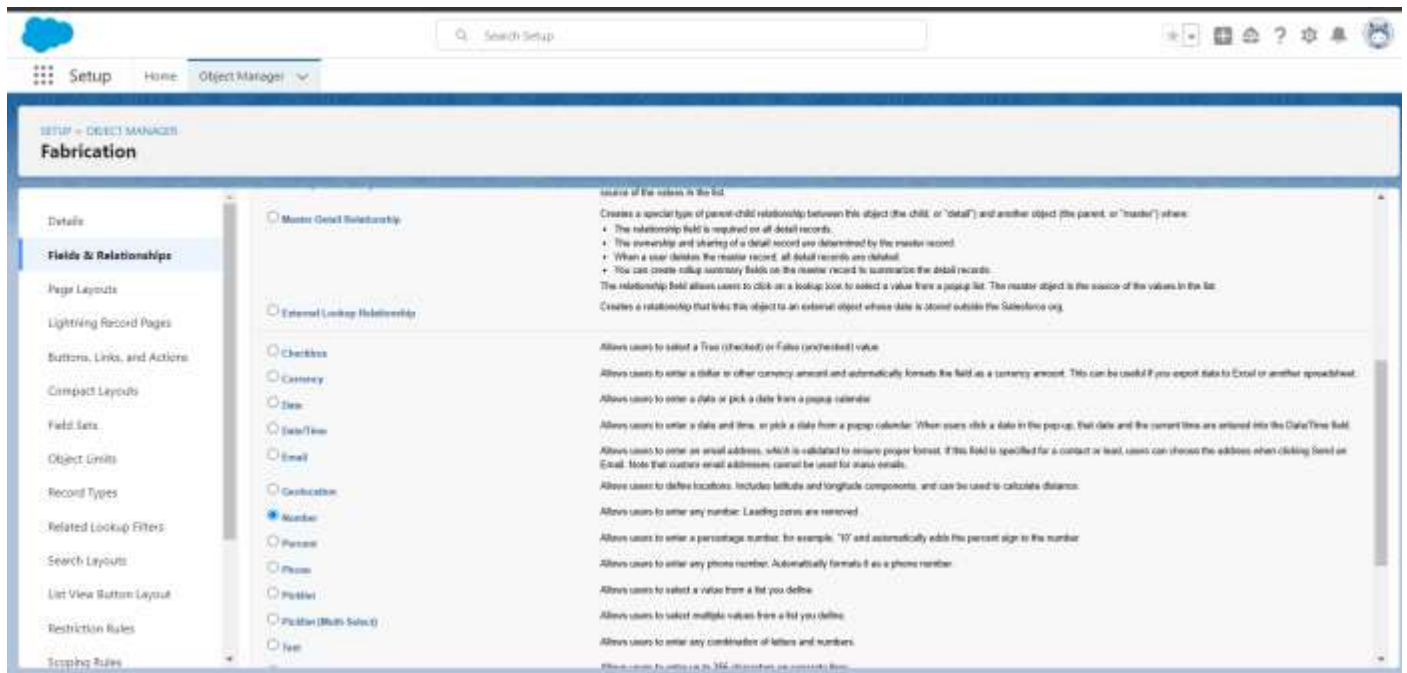
Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(\$User)		
Fabrication Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(\$User)		
Name of Company	Name_of_Company__c	Text(125)		✓
Name of the Owner	Name_of_the_Owner__c	Text(125)		✓
Owner	OwnerId	Lookup(\$UserGroup)		✓

To create another fields in an object:

Go to setup >> click on Object Manager >> type object name(Fabrication) in search bar >> click on the object.

Now click on “Fields & Relationships” >> New
Select Data type as a “Number” and Click on Next



Fill the Above as following:

Field Label: Length

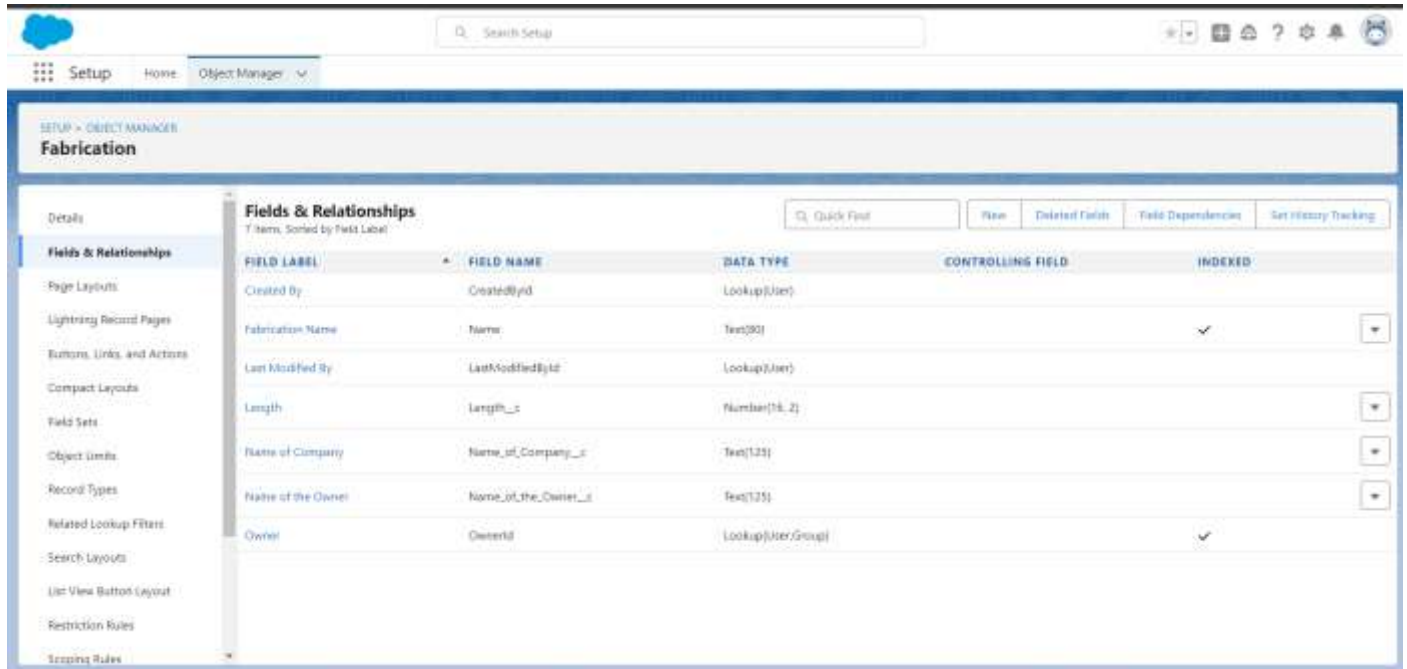
Field Name : Length

Length : 16

Decimal Value : 2

Required :check box

Click on Next >> Next >> Save and new.



To create another fields in an object:

Go to setup >> click on Object Manager >> type object name(Fabrication) in search bar >> click on the object.

Now click on “Fields & Relationships” >> New

Select Data type as a “Number” and Click on Next

Fill the Above as following:

Field Label: Breadth

Field Name : Breadth

Length : 16

Decimal Value : 2

Required :check box

The screenshot shows the Salesforce Setup interface. The left sidebar contains a navigation menu with options 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 Scoring Rules. The main content area is titled 'Fabrication' and 'New Custom Field'. It shows 'Step 2: Enter the details' with a 'Previous' button and a 'Next' button. The form fields are: Field Label (Breadth), Length (16), Decimal Places (2), Field Name (Breadth), Description, and Help Text. The 'Required' checkbox is checked, and the 'Unique' checkbox is unchecked. The 'External ID' checkbox is unchecked, and the 'AI Prediction' checkbox is unchecked.

Click on Next >> Next >> Save and new.

Setup > OBJECT MANAGER
Fabrication

Details

Fields & Relationships

8 Items, Sorted by Field Label

Quick Find

New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Width	Width_c	Number(16, 2)		
Created By	CreatedBy	Lookup(User)		
Fabrication Name	Name	Text(80)		✓
Last Modified By	LastModifiedBy	Lookup(User)		
Length	Length_c	Number(16, 2)		
Name of Company	Name_of_Company_c	Text(125)		
Name of the Owner	Name_of_the_Owner_c	Text(125)		
Owner	OwnerId	Lookup(User,Group)		✓

To create another fields in an object:

Go to setup >> click on Object Manager >> type object name(Fabrication) in search bar >> click on the object.

Now click on “Fields & Relationships” >> New

Select Data type as a “Number” and Click on Next

Fill the Above as following:

Field Label: Width

Field Name : Width

Length : 16

Decimal Value : 2

Required :check box

Setup - Object Manager - Fabrication

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

Fabrication: New Custom Field

Step 2 of 4: Enter the details

Field Label: Width

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 places can accept values up to "12345678.99".

Length: 10

Decimal Places: 2

Field Name: Width_c

Description:

Help Text:

Required: ☒ Always require a value in this field in order to save a record.

Unique: ☐ Do not allow duplicate values.

External ID: ☐ Set this field as the unique record identifier from an external system.

AI Prediction: ☐ Use this field to store AI prediction scores.

Click on Next >> Next >> Save and new.

Setup - Object Manager - Fabrication

Details

Fields & Relationships

9 Items, Sorted by Field Label

Quick Find:

New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Breadth	Breadth_c	Number(16, 2)		
Created By	CreatedById	Lookup(User)		
Fabrication Name	Name	Text(255)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Length	Length_c	Number(16, 2)		
Name of Company	Name_of_Company_c	Text(125)		
Name of the Owner	Name_of_the_Owner_c	Text(125)		
Owner	OwnerId	Lookup(User/Group)		✓
Width	Width_c	Number(16, 2)		

To create another fields in an object:

Go to setup >> click on Object Manager >> type object name(Fabrication) in search bar >> click on the object.

Now click on “Fields & Relationships” >> New

Select Data type as a “Formula” and Click on Next

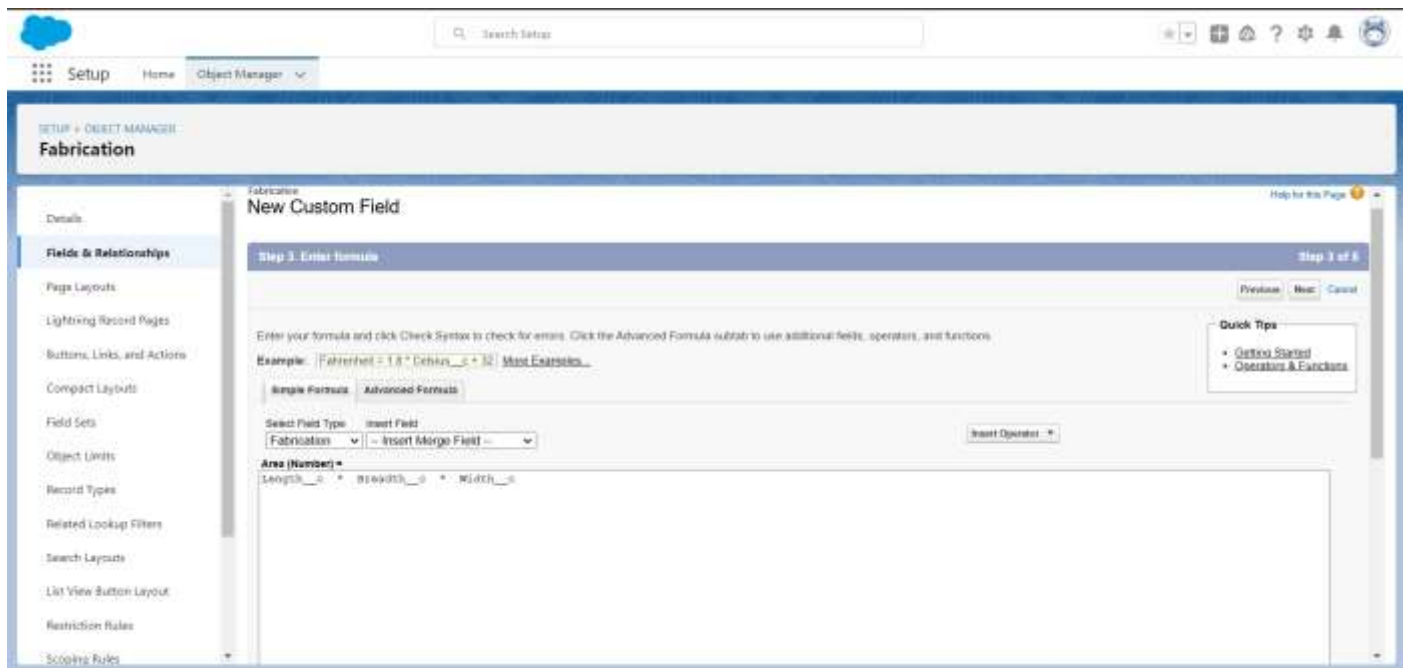
Fill the Above as following:

Field Label: Area

Field Name : Area

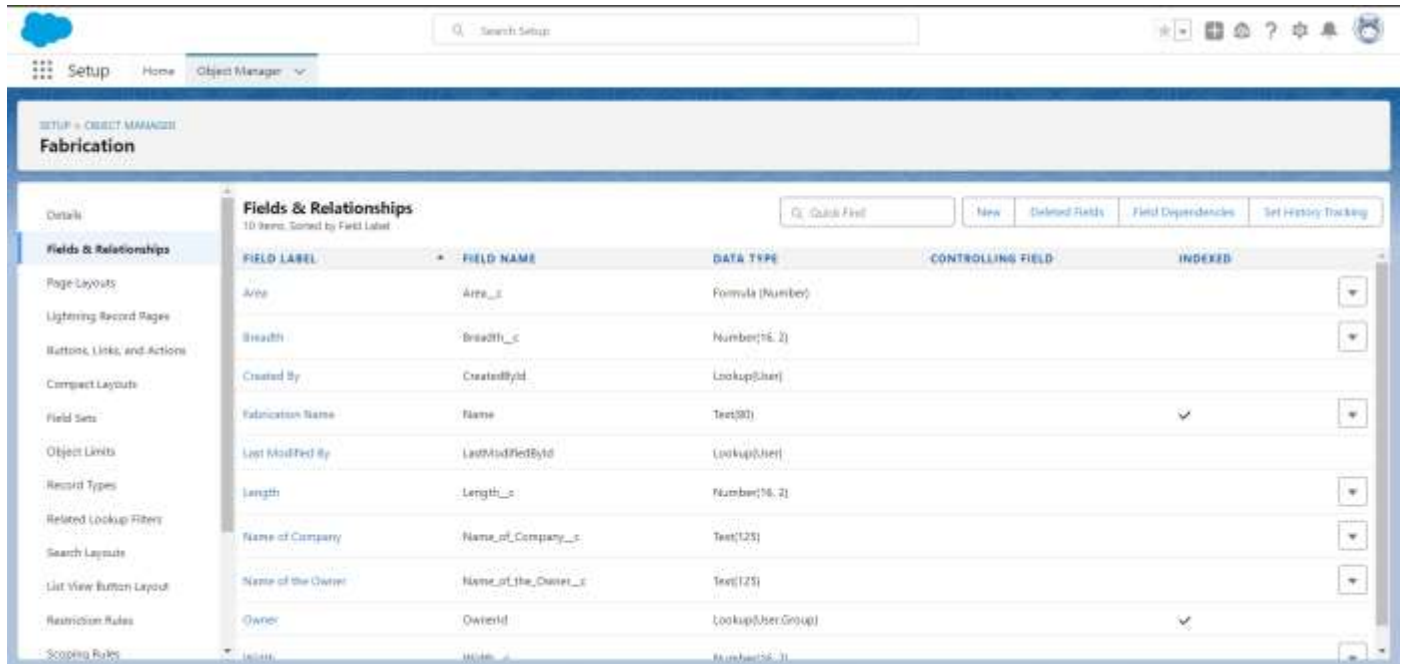
Formula Return Type : Select Number

Enter Formula : Length__c * Breadth__c * Width__c (Insert this fields using “Insert Field” Option)



The screenshot shows the 'New Custom Field' wizard in Salesforce Setup, specifically the 'Step 3: Enter Formula' screen for the 'Fabrication' object. The left sidebar shows the navigation menu with 'Fields & Relationships' selected. The main area displays the formula entry interface. The formula entered is 'Length__c * Breadth__c * Width__c'. The 'Area (Number)' field is highlighted. The 'Quick Tips' section on the right lists 'Get Started' and 'Operators & Functions'.

Click on Next >> Next >> Save and new.



The screenshot shows the 'Fields & Relationships' page in Salesforce Setup for the 'Fabrication' object. The left sidebar shows the navigation menu with 'Fields & Relationships' selected. The main area displays a table of fields. The table has columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The table lists 10 fields, including 'Area', 'Breadth', 'Created By', 'Fabrication Name', 'Last Modified By', 'Length', 'Name of Company', 'Name of the Owner', 'Owner', and 'Width'.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Area	Area__c	Formula (Number)		
Breadth	Breadth__c	Number(16, 2)		
Created By	CreatedById	Lookup(User)		
Fabrication Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Length	Length__c	Number(16, 2)		
Name of Company	Name_of_Company__c	Text(125)		
Name of the Owner	Name_of_the_Owner__c	Text(125)		
Owner	OwnerId	Lookup(User Group)		✓
Width	Width__c	Number(16, 2)		

To create another fields in an object:

Go to setup >> click on Object Manager >> type object name(Fabrication) in search bar >> click on the object.

Now click on “Fields & Relationships” >> New

Select Data type as a “Number” and Click on Next

Fill the Above as following:

Field Label: Cost per Meter

Field Name : Cost_per_meter

Set the Default value to '2'

Click on Next >> Select the read only checkbox

The screenshot shows the 'New Custom Field' wizard in Salesforce Setup, specifically Step 6: Add to page layouts. The field details are: Field Label: Cost per Meter, Data Type: Number, Field Name: Cost_per_meter, and Description: . The wizard prompts the user to select page layouts where this field should be added. The 'Fabrication Layout' is selected. The 'Preview' button is highlighted.

Field Label	Cost per Meter
Data Type	Number
Field Name	Cost_per_meter
Description	.

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout:

☒ Add Field Page Layout Name

☒ Fabrication Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Click on Next >> Save and new.

The screenshot shows the 'Fields & Relationships' section for the 'Fabrication' object in Salesforce Setup. It lists 11 fields, including 'Cost per Meter' which has been added. The 'Cost per Meter' field is highlighted in blue.

Field Label	Field Name	Data Type
Breadth	Breadth__c	Number(16, 2)
Cost per Meter	Cost_per_meter__c	Number(18, 0)
Created By	CreatedById	Lookup(User)
Fabrication Name	Name	Text(80)
Last Modified By	LastModifiedById	Lookup(User)
Length	Length__c	Number(16, 2)
Name of Company	Name_of_Company__c	Text(125)
Name of the Owner	Name_of_the_Owner__c	Text(125)
Owner	OwnerId	Lookup(User Group)
Width	Width__c	Number(16, 2)

To create another fields in an object:

Go to setup >> click on Object Manager >> type object name(Fabrication) in search bar >> click on the object.

Now click on "Fields & Relationships" >> New

Select Data type as a “Number” and Click on Next

Fill the Above as following:

Field Label: Quantity

Field Name : Quantity

Length : 16

Decimal Value : 2

Required :check box

SETUP - OBJECT MANAGER
Fabrication

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

Field Label:

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 places can accept values up to "12345678.90"

Length: Decimal Places:
Number of digits to the left of the decimal point
Number of digits to the right of the decimal point

Field Name:

Description:

Help Text:

Required: ☒ Always require a value in this field in order to save a record
Unique: ☐ Do not allow duplicate values
External ID: ☐ Set this field as the unique record identifier from an external system
AI Prediction: ☐ Use this field to store AI prediction scores
Auto add to custom report type: ☒ Add this field to existing custom report types that contain this entity

Default Value:

View Formula Editor: Enters full and partial value with series of double quotes. ("the, null") enters numbers without quotes. ("123", "2000", "2000000000", "0.0001", "10", "100", and so on) with a description in the standard format: ("number" = 10, "10")

Previous Next Cancel

Click on Next >> Next >> Save and new.

SETUP - OBJECT MANAGER
Fabrication

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

12 Items, Sorted by Field Label

Cost per Meter	Cost_per_Meter__c	Number(16, 0)	
Created By	CreatedById	Lookup(User)	
Fabrication Name	Name	Text(90)	✓
Last Modified By	LastModifiedById	Lookup(User)	
Length	Length__c	Number(16, 2)	
Name of Company	Name_of_Company__c	Text(125)	
Name of the Owner	Name_of_the_Owner__c	Text(125)	
Owner	OwnerId	Lookup(User, Group)	✓
Quantity	Quantity__c	Number(16, 2)	
Width	Width__c	Number(16, 2)	

To create another fields in an object:

Go to setup >> click on Object Manager >> type object name(Fabrication) in search bar >> click on the object.

Now click on “Fields & Relationships” >> New

Select Data type as a “Formula” and Click on Next

Fill the Above as following:

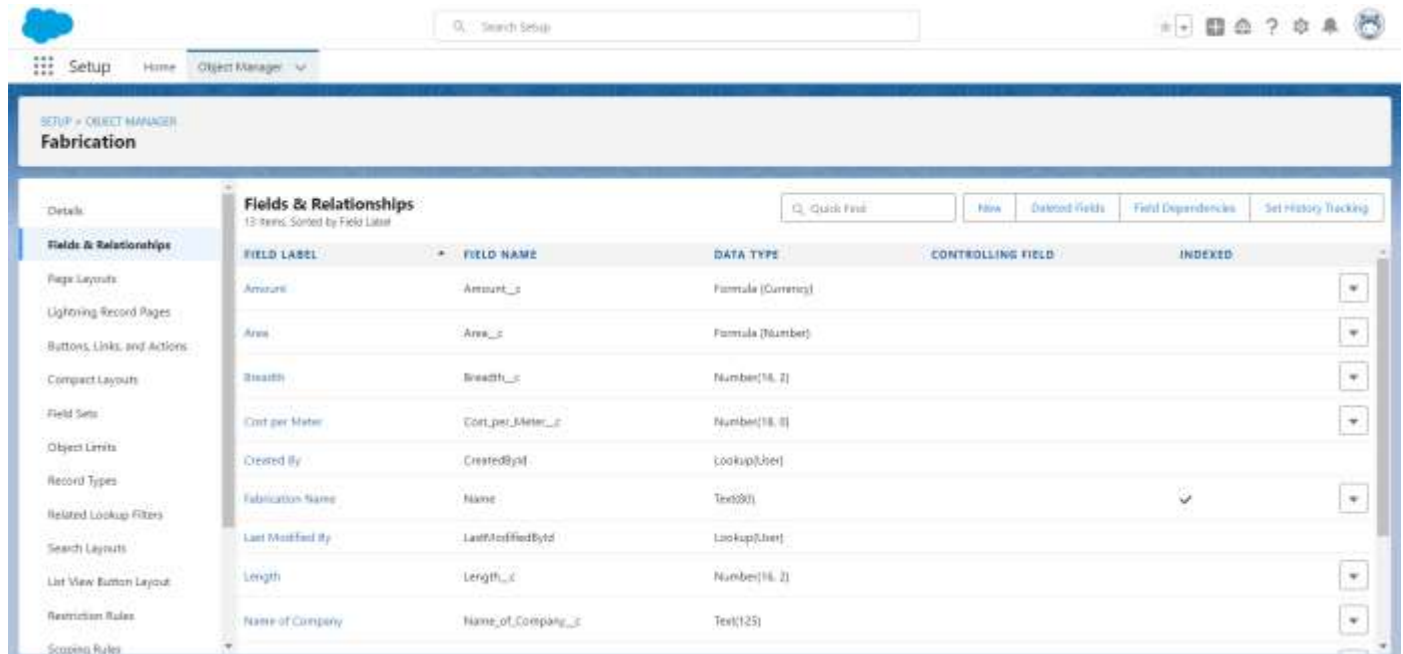
Field Label: Amount

Field Name : Amount

Formula Return Type : Select Currency

Enter Formula : $\text{Area_c} * \text{Cost_per_meter_c} * \text{Quantity_c}$ (Insert this fields using “Insert Field” Option)

Click on Next >> Next >> Save and new.



The screenshot shows the Salesforce Object Manager interface for the 'Fabrication' object. The 'Fields & Relationships' tab is active, displaying a table of existing fields. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount_c	Formula (Currency)		
Area	Area_c	Formula (Number)		
Breadth	Breadth_c	Number(16, 2)		
Cost per Meter	Cost_per_Meter_c	Number(16, 0)		
Created By	CreatedById	Lookup(User)		
Fabrication Name	Name	Text(20)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Length	Length_c	Number(16, 2)		
Name of Company	Name_of_Company_c	Text(125)		

To create another fields in an object:

Go to setup >> click on Object Manager >> type object name(Fabrication) in search bar >> click on the object.

Now click on “Fields & Relationships” >> New

Select Data type as a “Picklist” and Click on Next

Fill the Above as following:

Field Label: Material Type

Field Name : Material_Type

Values : Select Enter values, with each value separated by a new line

Enter this values in box :

Iron

Aluminum

Metal

Wood

Steel

The screenshot shows the 'New Custom Field' form in the 'Fabrication' object manager. The form is titled 'Step 2. Enter the details' and is part of a 4-step process. The 'Field Label' is 'Material Type'. The 'Value' section has a radio button for 'Use global picklist value set' (which is selected) and a text input for 'Enter values, with each value separated by a new line'. The text input contains the values: Iron, Aluminum, Metal, Wood. There are checkboxes for 'Display values alphabetically, not in the order entered' (unchecked), 'Use first value as default value' (unchecked), and 'Restrict picklist to the values defined in the value set' (checked). The 'Field Name' is 'Material_Type' and the 'Description' is empty.

Click on Next >> Next >> Save and new.

To create another fields in an object:

The screenshot shows the 'Fields & Relationships' table in the 'Fabrication' object manager. The table has 14 items, sorted by Field Label. The columns are 'Field Label', 'Field Name', and 'Field Type'. The table contains the following data:

Field Label	Field Name	Field Type
Breadth	Breadth__c	Number(16, 2)
Cost per Meter	Cost_per_Meter__c	Number(16, 0)
Created By	CreatedById	Lookup(User)
Fabrication Name	Name	Text(200)
Last Modified By	LastModifiedById	Lookup(User)
Length	Length__c	Number(16, 2)
Material Type	Material_Type__c	Picklist
Name of Company	Name_of_Company__c	Text(125)
Name of the Owner	Name_of_the_Owner__c	Text(125)

Go to setup >> click on Object Manager >> type object name(Fabrication) in search bar >> click on the object.

Now click on “Fields & Relationships” >> New

Select Data type as a “Currency” and Click on Next

Fill the Above as following:

Field Label: Final Price

Field Name : Final_Price

Field Label: Final Price

Field Name: Final_Price

Length: 18

Decimal Places: 0

Required: ☒ Always requires a value in this field in order to save a record

Add this field to existing custom report types that contain this entity: ☒

Click on Next >> Next >> Save and new.

Field Label	Field Name	Data Type	Field Type
Cost per Meter	Cost_per_Meter__c	Number(18, 0)	
Created By	CreatedById	Lookup(User)	
Fabrication Name	Name	Text(80)	✓
Final Price	Final_Price__c	Currency(18, 0)	
Last Modified By	LastModifiedById	Lookup(User)	
Length	Length__c	Number(16, 2)	
Material Type	Material_Type__c	Picklist	
Name of Company	Name_of_Company__c	Text(125)	
Name of the Owner	Name_of_the_Owner__c	Text(125)	
Owner	OwnerId	Lookup(User/Group)	✓

To create another fields in an object:

Go to setup >> click on Object Manager >> type object name(Fabrication) in search bar >> click on the object.

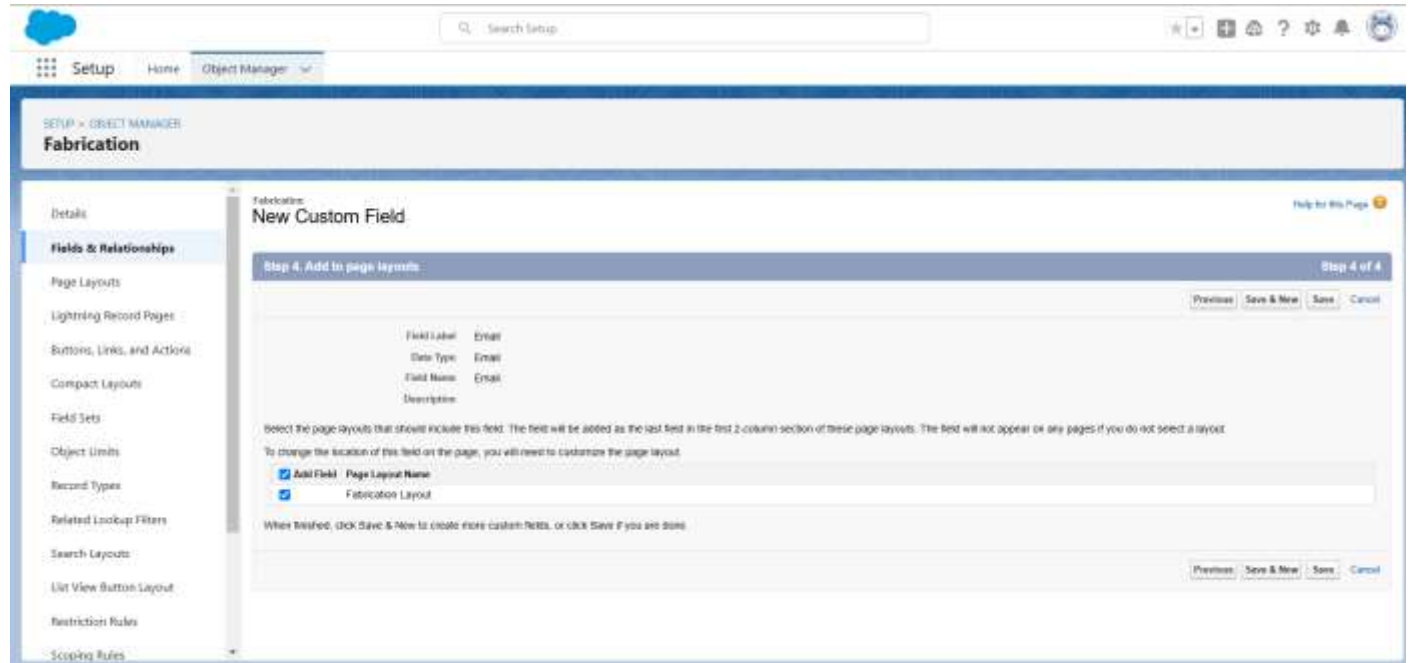
Now click on “Fields & Relationships” >> New

Select Data type as a “Email” and Click on Next

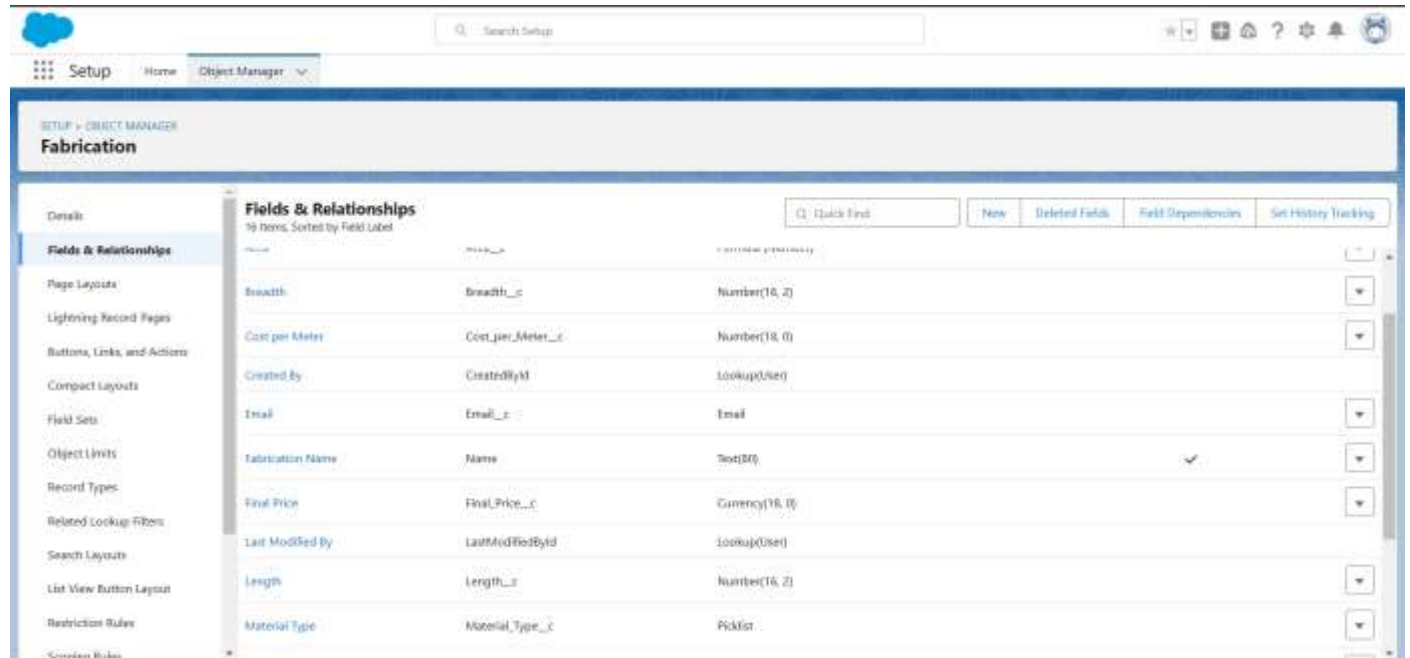
Fill the Above as following:

Field Label: Email

Field Name : Email



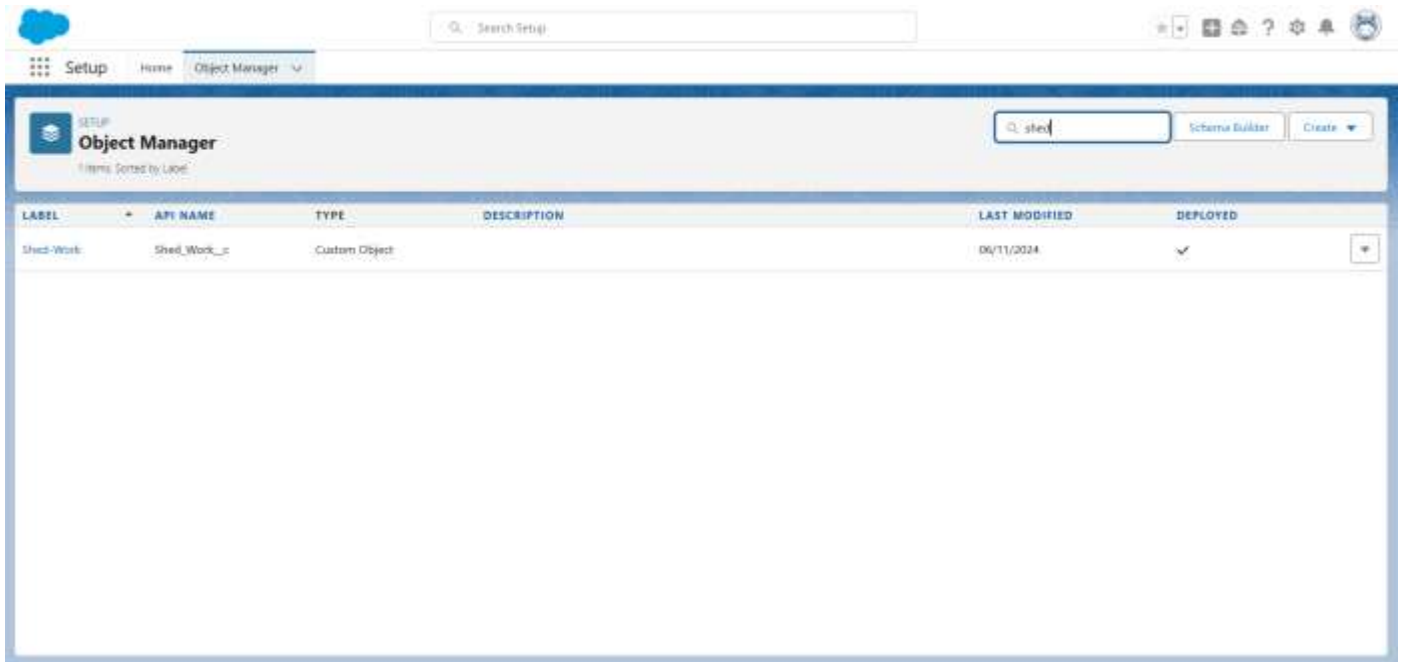
Click on Next >> Next >> Save.



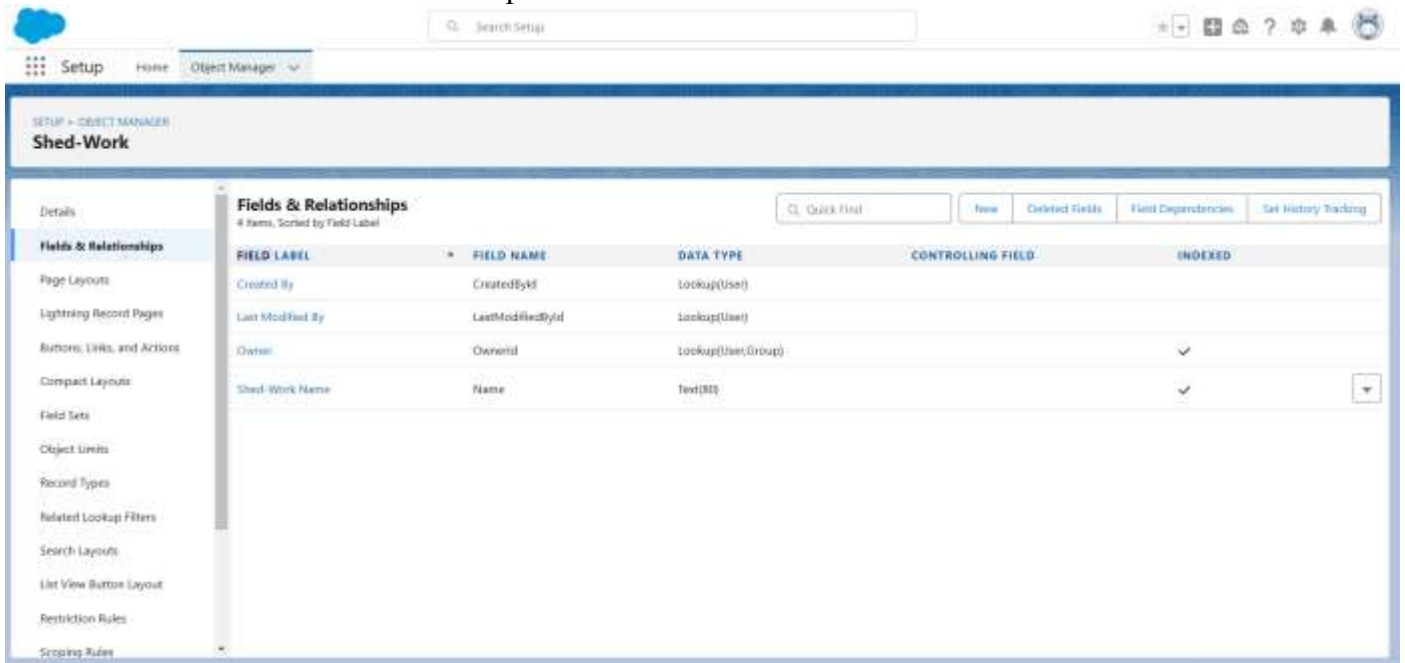
Field Label	Field Name	Data Type
Breadth	Breadth__c	Number(16, 2)
Cost per Meter	Cost_per_Meter__c	Number(18, 0)
Created By	CreatedById	Lookup(User)
Email	Email__c	Email
Fabrication Name	Name	Text(80)
Final Price	Final_Price__c	Currency(18, 0)
Last Modified By	LastModifiedById	Lookup(User)
Length	Length__c	Number(16, 2)
Material Type	Material_Type__c	Picklist

Task-2:Creation of fields for the Shed-Work object

1. Go to setup >> click on Object Manager >> type object name(Shed-Work) in search bar >> click on the object.



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



3. Select Data type as a “Text” and Click on Next

4. Fill the Above as following:

Field Label : Name of the Company

Field Name : gets auto generated

Click on required check box

The screenshot shows the Salesforce Setup interface. At the top, there's a search bar and navigation tabs for Setup, Home, and Object Manager. The main header indicates the path: SETUP > OBJECT MANAGER > Shed-Work. On the left, a sidebar lists various setup options, with 'Fields & Relationships' selected. The main content area is titled 'New Custom Field' and shows 'Step 2 of 4: Enter the details'. The form includes fields for 'Field Label' (Name of the Company), 'Length' (with a hint to enter the maximum length), 'Field Name' (Name_of_the_Company), and 'Description'. There are also checkboxes for 'Required' (checked), 'Unique' (unchecked), and 'External ID' (unchecked). At the bottom, there are checkboxes for 'Add this field to existing custom report types that contain this entity' (checked) and 'Add this field to existing custom report types that contain this entity' (unchecked).

Click on Next >> Next >> Save and new.

To create another fields in an object:

Go to setup >> click on Object Manager >> type object name(Shed-Work) in search bar >> click on the object.

Now click on “Fields & Relationships” >> New

Select Data type as a “Text” and Click on Next

Fill the Above as following:

Field Label : Name of the Owner

Field Name : Name_of_Owner

Click on required check box

Click on Next >> Next >> Save and new.

To create another fields in an object:

Go to setup >> click on Object Manager >> type object name(Shed-Work) in search bar >> click on the object.

Now click on “Fields & Relationships” >> New

Select Data type as a “Number” and Click on Next

Fill the Above as following:

Field Label: Height

Field Name : Height

Length : 16

Decimal Value : 2

Required :check box

Setup > OBJECT MANAGER
Shed-Work

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

Shed-Work
New Custom Field
Help to this Page

Step 2 of 4
Step 2. Enter the details
Previous Next Cancel

Field Label: Height

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 places can accept values up to "12345678.90".

Length: 10
Number of digits to the left of the decimal point

Decimal Places: 2
Number of digits to the right of the decimal point

Field Name: Height

Description

Help Text

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

Unique: ☐ Do not allow duplicate values

External ID: ☐ Set this field as the unique record identifier from an external system

AI Prediction: ☐ Use this field to store AI prediction scores

Click on Next >> Next >> Save and new.

To create another fields in an object:

Go to setup >> click on Object Manager >> type object name(Shed-Work) in search bar >> click on the object.

Now click on “Fields & Relationships” >> New

Select Data type as a “Number” and Click on Next

Fill the Above as following:

Field Label: Breadth

Field Name : Breadth

Length : 16

Decimal Value : 2

Required :check box

Setup > OBJECT MANAGER
Shed-Work

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Links
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules

Shed-Work
New Custom Field
Step 2 of 4: Enter the details
Previous Next Cancel

Field Label: Broodth

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 places can accept values up to "03125678.90".

Length: 16
Number of digits to the left of the decimal point

Decimal Places: 2
Number of digits to the right of the decimal point

Field Name: Broodth

Description:

Help Text:

Required: ☒ Always requires a value in this field in order to save a record.
Unique: ☐ Do not allow duplicate values.
External ID: ☐ Set this field as the unique record identifier from an external system.
AI Prediction: ☐ Use this field to store AI prediction scores.

Click on Next >> Next >> Save and new.

To create another fields in an object:

Go to setup >> click on Object Manager >> type object name(Shed-Work) in search bar >> click on the object.

Now click on “Fields & Relationships” >> New

Select Data type as a “Number” and Click on Next

Fill the Above as following:

Field Label: Width

Field Name : Width

Length : 16

Decimal Value : 2

Required :check box

Setup > OBJECT MANAGER
Shed-Work

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

Shed-Work
New Custom Field

Step 2: Enter the details

Field Label: Width

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 places can accept values up to "12345678.90".

Length: 10
Number of digits to the left of the decimal point

Decimal Places: 2
Number of digits to the right of the decimal point

Field Name: Width

Description:

Help Text:

Required: ☒ Always require a value in this field in order to save a record.

Unique: ☐ Do not allow duplicate values.

External ID: ☐ Set this field as the unique record identifier from an external system.

AI Prediction: ☐ Use this field to store AI prediction scores.

Click on Next >> Next >> Save and new.

To create another fields in an object:

Go to setup >> click on Object Manager >> type object name(Shed-Work) in search bar >> click on the object.

Now click on “Fields & Relationships” >> New

Select Data type as a “Formula” and Click on Next

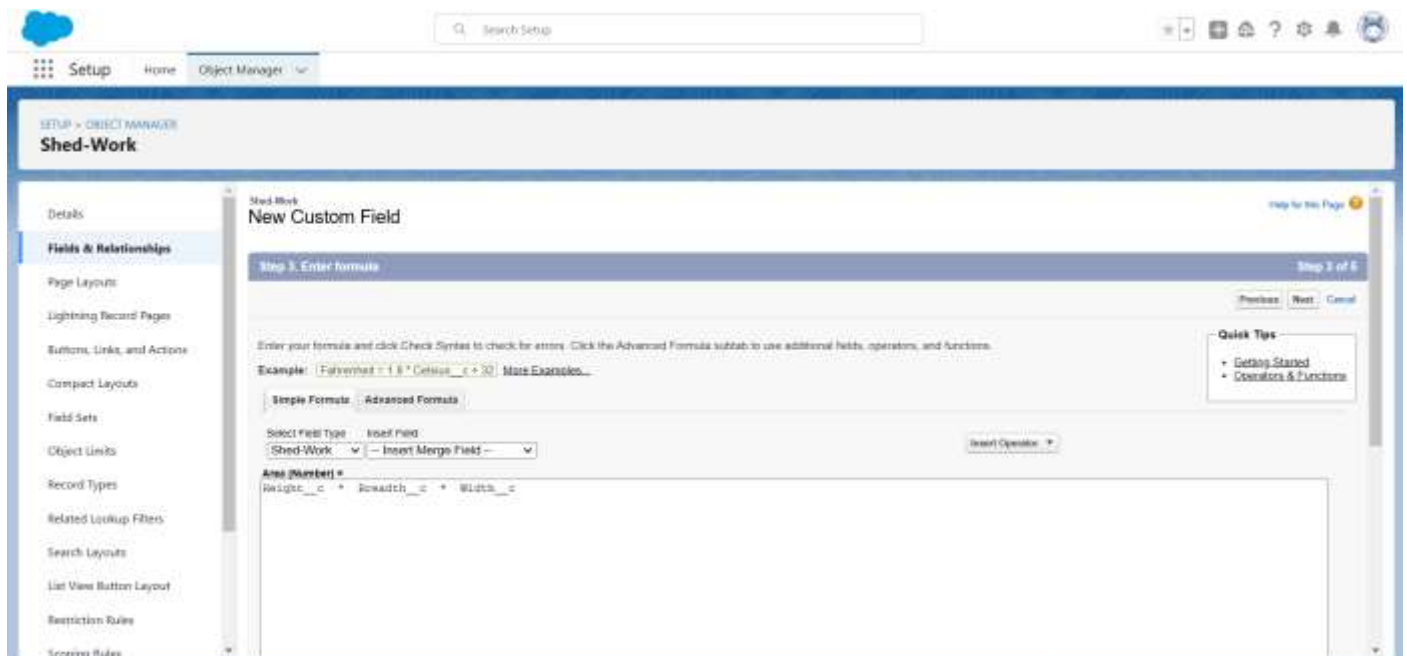
Fill the Above as following:

Field Label: Area

Field Name : Area

Formula Return Type : Select Number

Enter Formula : Height__c * Breadth__c * Width__c (Insert this fields using “Insert Field” Option)



To create another fields in an object:

Go to setup >> click on Object Manager >> type object name(Shed-Work) in search bar >> click on the object.

Now click on “Fields & Relationships” >> New

Select Data type as a “Formula” and Click on Next

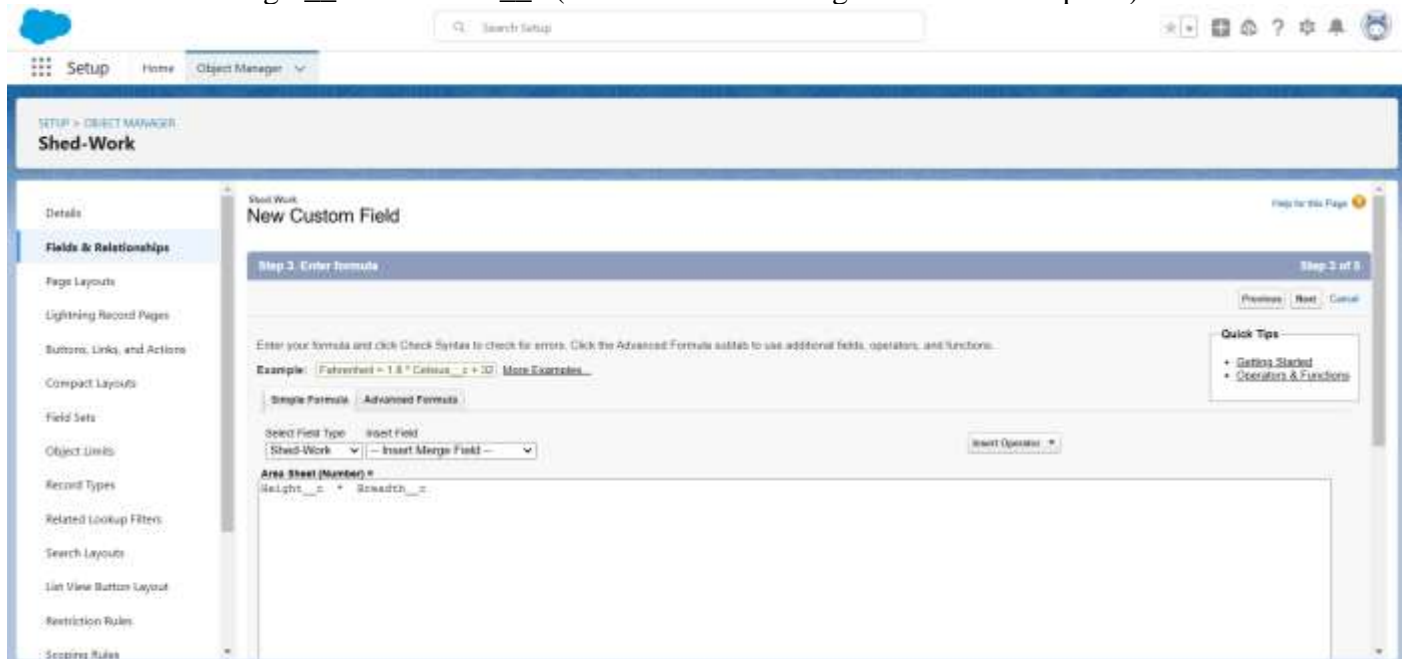
Fill the Above as following:

Field Label: Area Sheet

Field Name : Area_Sheet

Formula Return Type : Select Number

Enter Formula : Height__c * Breadth__c (Insert this fields using “Insert Field” Option)



To create another fields in an object:

Go to setup >> click on Object Manager >> type object name(Shed-Work) in search bar >> click on the object.

Now click on “Fields & Relationships” >> New

Select Data type as a “Number” and Click on Next

Fill the Above as following:

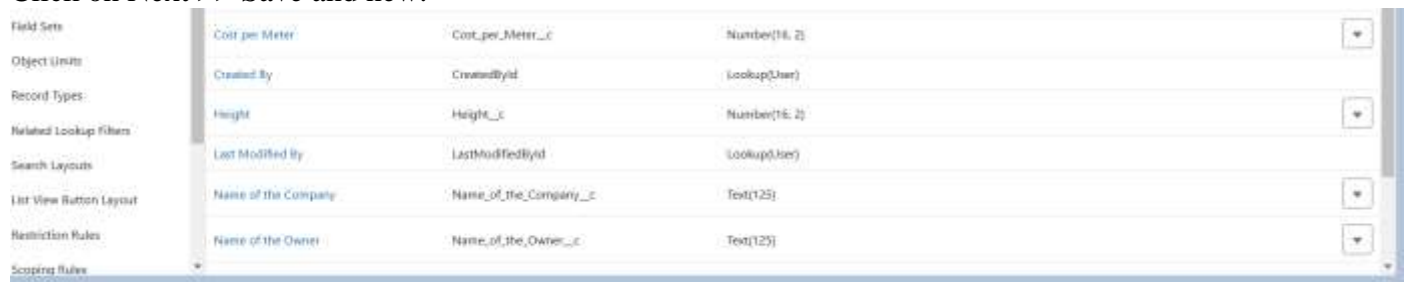
Field Label: Cost per Meter

Field Name : Cost_per_meter

Set the Default value to ‘2’

Click on Next >> Select the read only checkbox

Click on Next >> Save and new.



Field Label	Field Name	Data Type
Cost per Meter	Cost_per_meter_c	Number(16, 2)
Created By	CreatedById	Lookup(User)
Height	Height_c	Number(16, 2)
Last Modified By	LastModifiedById	Lookup(User)
Name of the Company	Name_of_the_Company_c	Text(125)
Name of the Owner	Name_of_the_Owner_c	Text(125)

To create another fields in an object:

Go to setup >> click on Object Manager >> type object name(Shed-Work) in search bar >> click on the object.

Now click on “Fields & Relationships” >> New

Select Data type as a “Number” and Click on Next

Fill the Above as following:

Field Label: Quantity

Field Name : Quantity

Length : 16

Decimal Value : 2

Required :check box

Setup - Object Manager - Shed-Work

Shed-Work New Custom Field

Step 2 of 4: Enter the details

Field Label:

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 places can accept values up to "12345678.90".

Length: Decimal Places:

Number of digits to the left of the decimal point. Number of digits to the right of the decimal point.

Field Name:

Description:

Help Text:

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

Unique: ☐ Do not allow duplicate values

External ID: ☐ Set this field as the unique record identifier from an external system

AI Prediction: ☐ Use this field to store AI prediction scores

Click on Next >> Next >> Save and new

To create another fields in an object:

Go to setup >> click on Object Manager >> type object name(Shed-Work) in search bar >> click on the object.

Now click on “Fields & Relationships” >> New

Select Data type as a “Number” and Click on Next

Fill the Above as following:

Field Label: Cost per meter sheet

Field Name : Cost_per_meter_sheet

Set the Default value to ‘2’

Shed-Work
New Custom Field

Step 2: Enter the details

Field Label: Cost per meter sheet

Length: 10
Number of digits to the left of the decimal point

Decimal Places: 2
Number of digits to the right of the decimal point

Field Name: Cost_per_meter_sheet

Description:

Help Text:

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

Unique: ☐ Do not allow duplicate values.

External ID: ☐ Set this field as the unique record identifier from an external system.

AI Prediction: ☐ Use this field to store AI prediction scores.

Click on Next >> Select the read only checkbox

Click on Next >> Save and new.

To create another fields in an object:

Go to setup >> click on Object Manager >> type object name(Shed-Work) in search bar >> click on the object.

Now click on “Fields & Relationships” >> New

Select Data type as a “Formula” and Click on Next

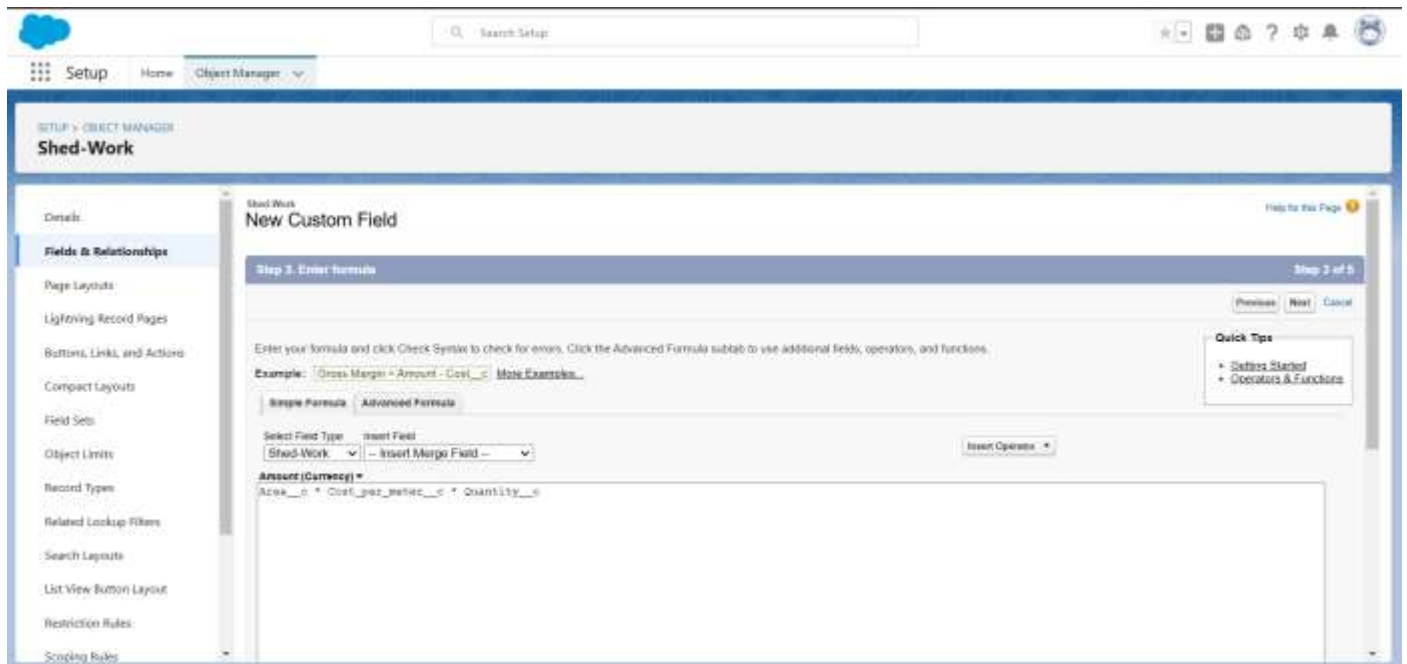
Fill the Above as following:

Field Label: Amount

Field Name : Amount

Formula Return Type : Select Currency

Enter Formula : $\text{Area_c} * \text{Cost_per_meter_c} * \text{Quantity_c}$ (Insert this fields using “Insert Field” Option)



Click on Next >> Next >> Save and new.

To create another fields in an object:

Go to setup >> click on Object Manager >> type object name(Shed-Work) in search bar >> click on the object.

Now click on “Fields & Relationships” >> New

Select Data type as a “Formula” and Click on Next

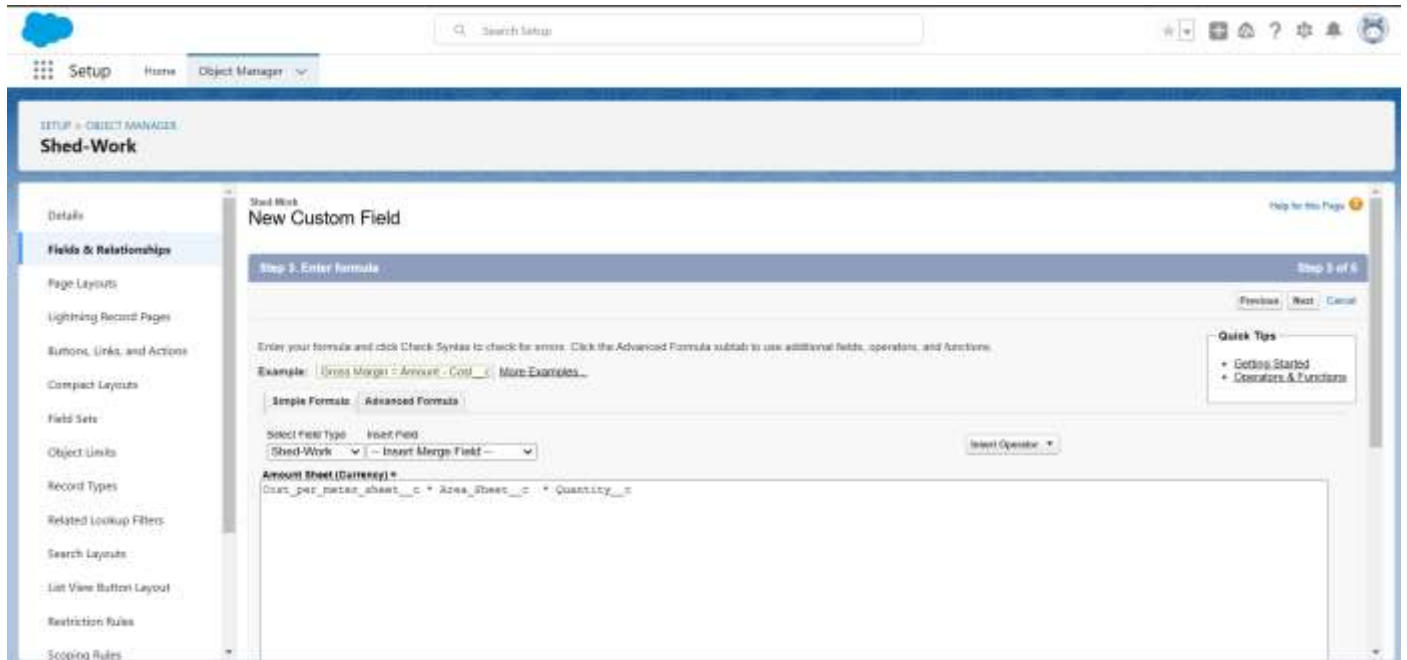
Fill the Above as following:

Field Label: Amount Sheet

Field Name : Amount_Sheet

Formula Return Type : Select Currency

Enter Formula : Cost_per_meter_sheet__c * Area_Sheet__c * Quantity_c(Insert this fields using “Insert Field” Option)



Click on Next >> Next >> Save and new.

To create another fields in an object:

Go to setup >> click on Object Manager >> type object name(Shed-Work) in search bar >> click on the object.

Now click on “Fields & Relationships” >> New

Select Data type as a “Picklist” and Click on Next

Fill the Above as following:

Field Label: Material Type

Field Name : Material_Type

Values : Select Enter values, with each value separated by a new line

Enter this values in box :

Iron

Metal

Steel

The screenshot shows the Salesforce Setup interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager'. Below this, the 'Shed-Work' object is selected. The left sidebar shows a list of setup options, with 'Fields & Relationships' highlighted. The main area displays the 'New Custom Field' wizard. The wizard is at 'Step 2 of 4: Enter the details'. The 'Field Label' is 'Material Type'. The 'Values' section is set to 'Enter values, with each value separated by a new line', with a text box containing 'Iron', 'Metal', and 'Steel'. The 'Field Name' is 'Material_Type'. The 'Restriction Rules' section is checked, and the 'Field Name' is 'Material_Type'.

Click on Next >> Next >> Save and new.

To create another fields in an object:

Go to setup >> click on Object Manager >> type object name(Shed-Work) in search bar >> click on the object.

Now click on “Fields & Relationships” >> New

Select Data type as a “Picklist” and Click on Next

Fill the Above as following:

Field Label: Material Type Sheet

Field Name : Material_Type_Sheet

Values : Select Enter values, with each value separated by a new line

Enter this values in box :

Plastic

Metal

Rubber

Click on Next >> Next >> Save and new.

To create another fields in an object:

Go to setup >> click on Object Manager >> type object name(Shed-Work) in search bar >> click on the object.

Now click on “Fields & Relationships” >> New

Select Data type as a “Email” and Click on Next

Fill the Above as following:

Field Label: Email

Field Name : Email

The screenshot shows the Salesforce Setup interface for creating a new custom field. The left sidebar contains navigation links: Setup, Home, Object Manager, 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, and Restriction Rules. The main content area is titled 'New Custom Field' and shows the 'Fields & Relationships' section. The 'Field Label' and 'Field Name' are both set to 'Email'. The 'Description' and 'Help Text' fields are empty. The 'Required' checkbox is unchecked, and the 'Always requires a value in this field in order to save a record' option is selected. The 'External ID' checkbox is unchecked, and the 'Set this field as the unique record identifier from an external system' option is selected. The 'Default Value' is set to 'Show External Data'.

Click on Next >> Next >> Save.

Shed-Work

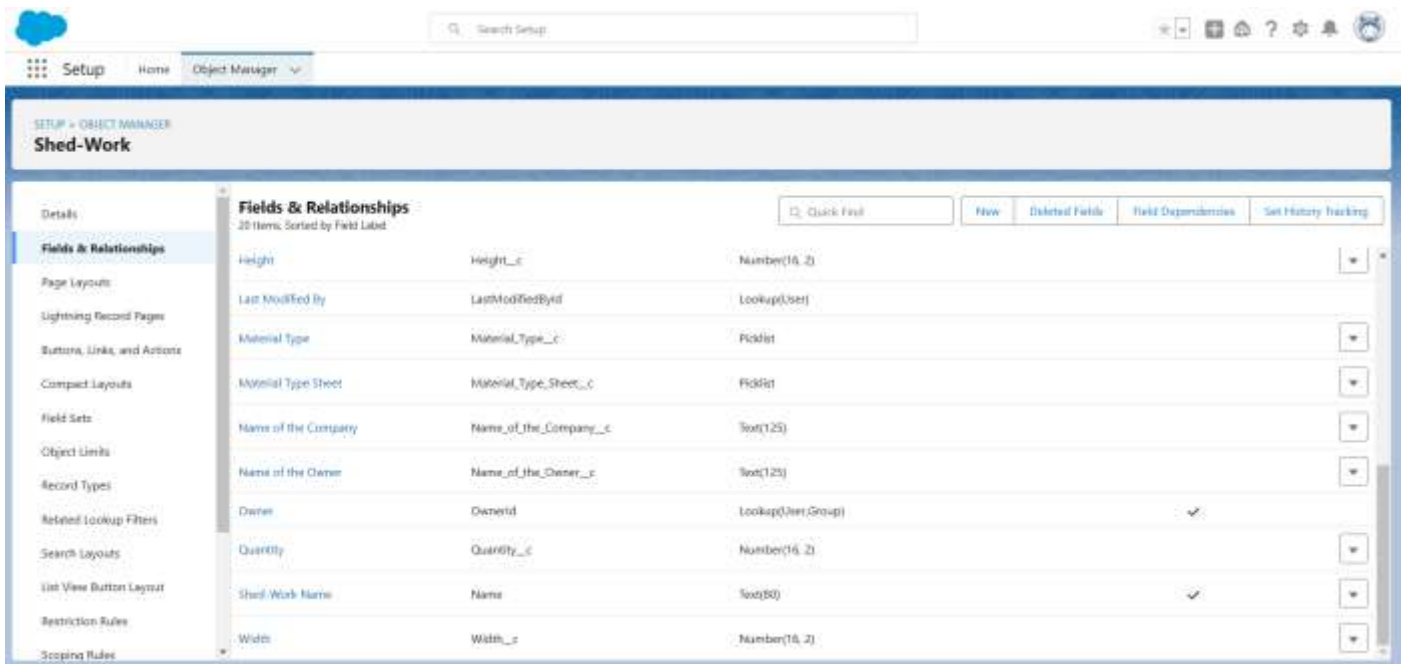
Details

- 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

Fields & Relationships

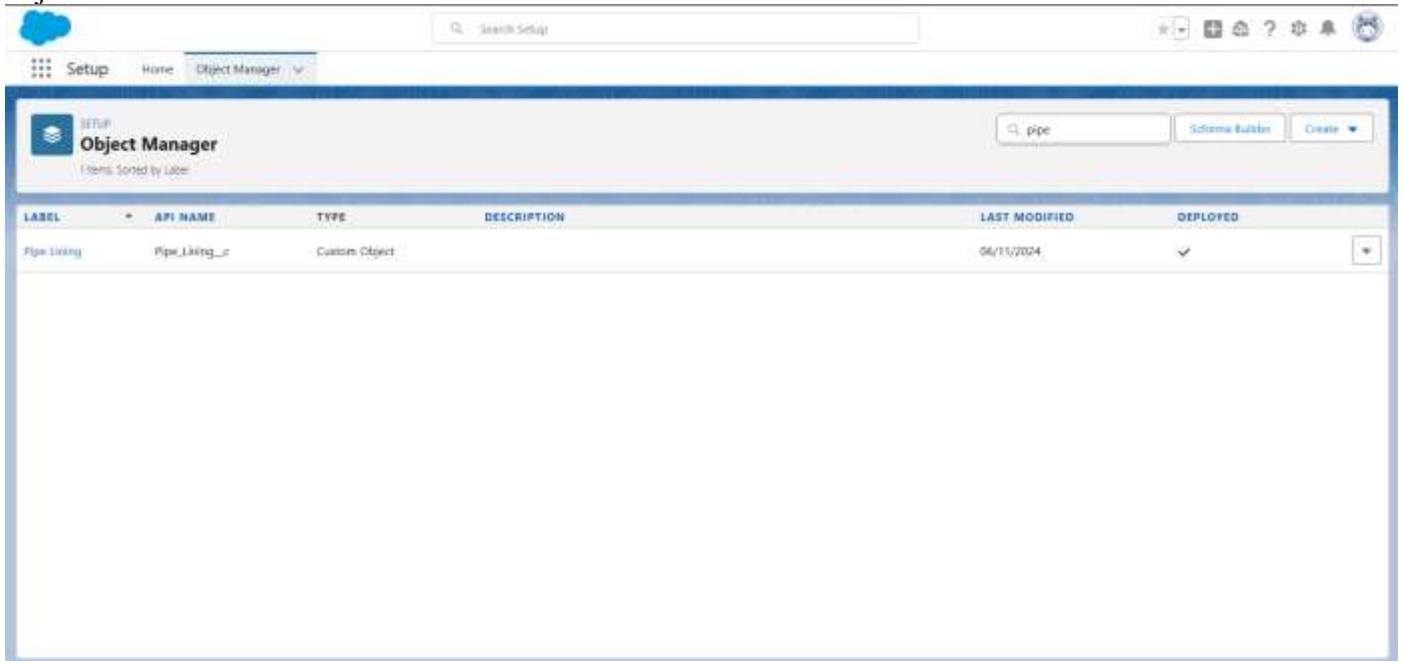
20 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Formula (Currency)		
Amount Sheet	Amount_Sheet__c	Formula (Currency)		
Area	Area__c	Formula (Number)		
Area Sheet	Area_Sheet__c	Formula (Number)		
Breadth	Breadth__c	Number(16, 2)		
Cost per Meter	Cost_per_Meter__c	Number(16, 2)		
Cost per meter sheet	Cost_per_meter_sheet__c	Number(16, 2)		
Created By	CreatedById	Lookup(User)		
Email	Email__c	Email		



Creation of fields for the Pipe Lining object

1. Go to setup >> click on Object Manager >> type object name(Pipe Lining) in search bar >> click on the object.



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

3. Select Data type as a “Text” and Click on Next

4. Fill the Above as following:

Field Label : Name of the Company

Field Name : gets auto generated

Click on required check box

Setup > OBJECT MANAGER

Pipe Lining

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Links

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Pipe Lining

New Custom Field

Step 2 of 4: Enter the details

Field Label: Name of the Company

Please enter the maximum length for a text field below:

Length: 125

Field Name: Name_of_the_Company

Description:

Help Text:

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.

☒ Add this field to existing custom report types that contain this entity.

Auto add to custom report type

Help for this Page

Previous Next Cancel

Click on Next >> Next >> Save and new.

To create another fields in an object:

Go to setup >> click on Object Manager >> type object name(Pipe Lining) in search bar >> click on the object.

Now click on “Fields & Relationships” >> New

Select Data type as a “Text” and Click on Next

Fill the Above as following:

Field Label : Name of the Owner

Field Name : Name_of_Owner

Click on required check box

Setup - OBJECT MANAGER
Pipe Lining

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

Pipe Lining
New Custom Field
Step 2 of 4
Step 2: Enter the details
Previous Next Cancel

Field Label: Name of the Owner
Please enter the maximum length for a text field below:
Length: 16
Field Name: Name_of_the_Owner
Description:
Help Text:
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

Click on Next >> Next >> Save and new.

To create another fields in an object:

Go to setup >> click on Object Manager >> type object name(Pipe Lining) in search bar >> click on the object.

Now click on “Fields & Relationships” >> New

Select Data type as a “Number” and Click on Next

Fill the Above as following:

Field Label: Height

Field Name : Height

Length : 16

Decimal Value : 2

Required :check box

Setup > OBJECT MANAGER
Pipe Lining

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

Pipe Lining
New Custom Field

Step 2. Enter the details

Field Label:

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 places can accept values up to "12345678.90".

Length: Number of digits to the left of the decimal point

Decimal Places: Number of digits to the right of the decimal point

Field Name:

Description:

Help Text:

Required: ☒ Always require a value in this field in order to save a record.

Unique: ☐ Do not allow duplicate values.

External ID: ☐ Set this field as the unique record identifier from an external system.

AI Prediction: ☐ Use this field to store AI prediction scores.

Previous Next Cancel

Click on Next >> Next >> Save and new.

To create another fields in an object:

Go to setup >> click on Object Manager >> type object name(Pipe Lining) in search bar >> click on the object.

Now click on “Fields & Relationships” >> New

Select Data type as a “Number” and Click on Next

Fill the Above as following:

Field Label: Width

Field Name : Width

Length : 16

Decimal Value : 2

Required :check box

The screenshot shows the Salesforce Setup interface for the 'Pipe Lining' object. The 'Fields & Relationships' tab is selected in the left sidebar. The 'New Custom Field' wizard is in progress, showing 'Step 3: Enter the details'. The field is named 'Width' with a length of 16 and 2 decimal places. The 'Required' checkbox is checked. The 'Field Label' is 'Width' and the 'Field Name' is 'Width'. The 'Description' and 'Help Text' fields are empty. The 'Required' checkbox is checked, and the 'Always require a value in this field in order to save a record' option is selected. The 'Do not allow duplicate values' checkbox is unchecked. The 'Set this field as the unique record identifier from an external system' checkbox is unchecked. The 'Use this field to store AI prediction scores' checkbox is unchecked.

Click on Next >> Next >> Save and new.

To create another fields in an object:

Go to setup >> click on Object Manager >> type object name(Pipe Lining) in search bar >> click on the object.

Now click on “Fields & Relationships” >> New

Select Data type as a “Number” and Click on Next

Fill the Above as following:

Field Label: Diameter

Field Name : Diameter

Length : 16

Decimal Value : 2

Required :check box

The screenshot shows the Salesforce Setup interface for configuring a custom field for the 'Pipe Lining' object. The 'Fields & Relationships' tab is selected in the left sidebar. The 'New Custom Field' wizard is in progress, showing 'Step 2 of 4: Enter the details'. The field is named 'Diameter' with a length of 16 and 2 decimal places. The 'Required' checkbox is checked. The 'Field Label' is 'Diameter' and the 'Field Name' is 'Diameter'. The 'Description' and 'Help Text' fields are empty. The 'Required' checkbox is checked, and the 'Unique' checkbox is unchecked. The 'External ID' checkbox is unchecked, and the 'AI Prediction' checkbox is unchecked.

Click on Next >> Next >> Save and new.

To create another fields in an object:

Go to setup >> click on Object Manager >> type object name(Pipe Lining) in search bar >> click on the object.

Now click on “Fields & Relationships” >> New

Select Data type as a “Formula” and Click on Next

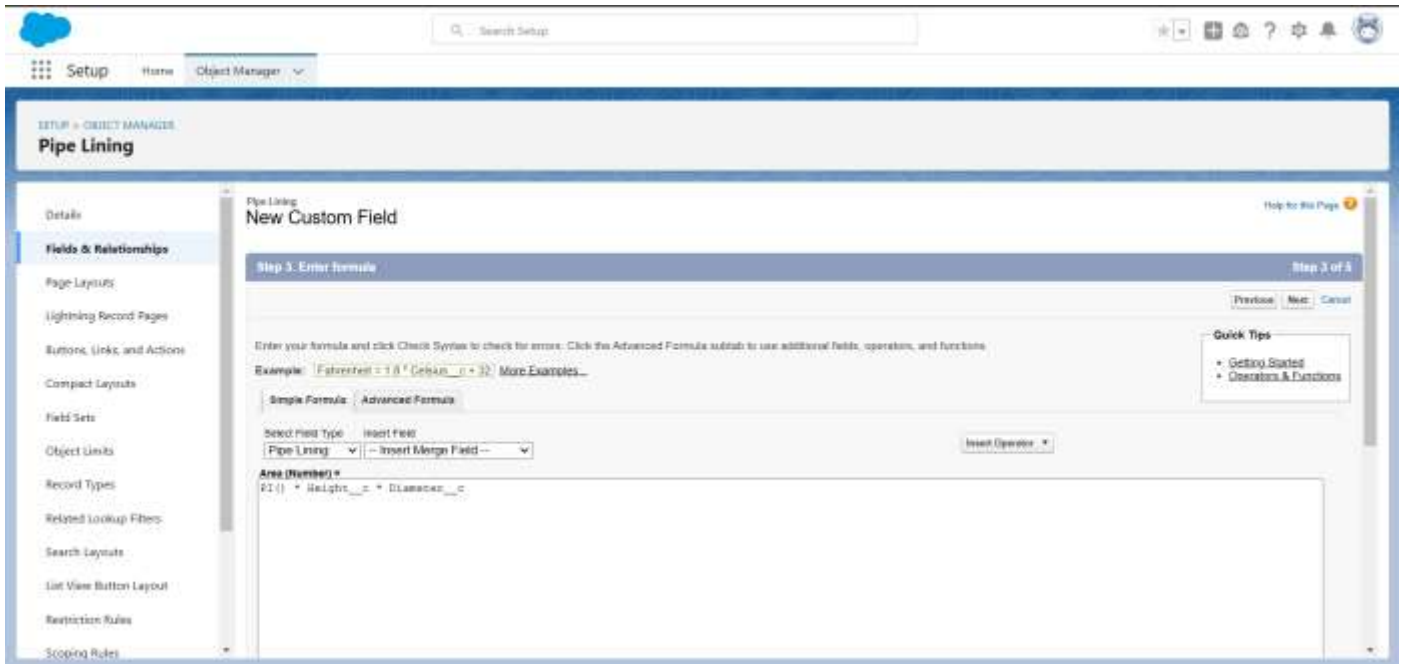
Fill the Above as following:

Field Label: Area

Field Name : Area

Formula Return Type : Select Number

Enter Formula : $\text{PI() * Height_c * Diameter_c}$ (Insert this fields using “Insert Field” Option)



Setup - Object Manager - Pipe Lining

Pipe Lining New Custom Field

Step 3: Enter formula

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

Example: `FirstName + ' ' + LastName` More Examples...

Simple Formula: Advanced Formula

Select field type: Pipe Lining Insert Field

Insert Merge Field

Insert Operator

Area (Number) *

`PI() * Height__c * Diameter__c`

Previous Next Cancel

Quick Tips

- Getting Started
- Operators & Functions

To create another fields in an object:

Go to setup >> click on Object Manager >> type object name(Pipe Lining) in search bar >> click on the object.

Now click on “Fields & Relationships” >> New

Select Data type as a “Number” and Click on Next

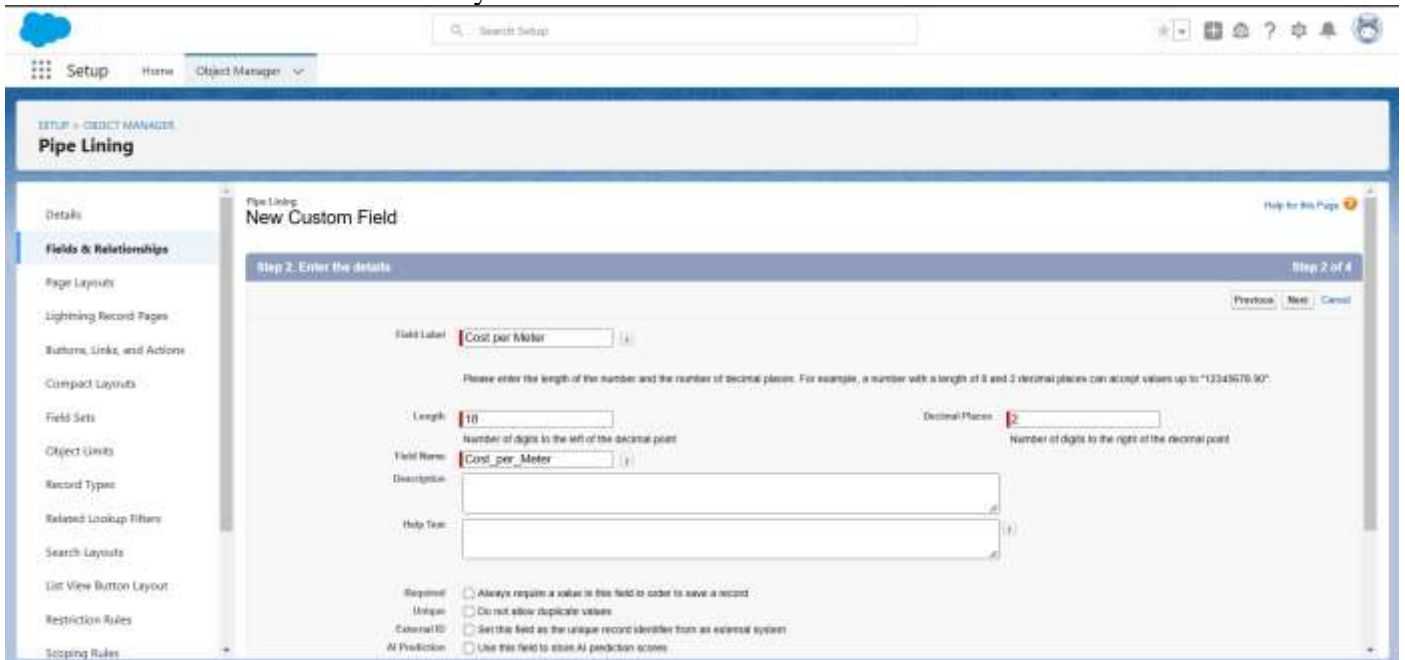
Fill the Above as following:

Field Label: Cost per Meter

Field Name : Cost_per_meter

Set the Default value to ‘2’

Click on Next >> Select the read only checkbox



Setup - Object Manager - Pipe Lining

Pipe Lining New Custom Field

Step 2: Enter the details

Field Label: Cost per Meter

Please enter the length of the number and the number of decimal places. For example, a number with a length of 8 and 3 decimal places can accept values up to "12345678.90".

Length: 10 Decimal Places: 2

Field Name: Cost_per_meter

Description:

Help Text:

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

Unique: ☐ Do not allow duplicate values.

External ID: ☐ Set this field as the unique record identifier from an external system.

AI Prediction: ☐ Use this field to store AI prediction scores.

Previous Next Cancel

Click on Next >> Save and new.

To create another fields in an object:

Go to setup >> click on Object Manager >> type object name(Pipe Lining) in search bar >> click on the object.

Now click on “Fields & Relationships” >> New

Select Data type as a “Number” and Click on Next

Fill the Above as following:

Field Label: Quantity

Field Name : Quantity

Length : 16

Decimal Value : 2

Required :check box

The screenshot shows the Salesforce Setup interface. At the top, there is a search bar labeled 'Search Setup'. Below it, the navigation menu includes 'Setup', 'Home', and 'Object Manager'. The 'Object Manager' section is expanded, showing 'Pipe Lining' as the selected object. The left sidebar contains a list of options: '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 'Fields & Relationships' option is selected. The main content area displays the 'New Custom Field' dialog for 'Pipe Lining'. The dialog has a title bar 'Pipe Lining New Custom Field' and a subtitle 'Step 3. Enter the details'. It includes a 'Field Label' field with the value 'Quantity', a 'Length' field with the value '16', and a 'Decimal Places' field with the value '2'. There are also fields for 'Field Name' (Quantity), 'Description', and 'Help Text'. At the bottom, there are checkboxes for 'Required' (checked), 'Unique', 'External ID', and 'No Flowsheet'. A note at the bottom states: 'Always require a value in this field in order to save a record:'. The dialog also includes 'Previous', 'Next', and 'Cancel' buttons.

Click on Next >> Next >> Save and new

To create another fields in an object:

Go to setup >> click on Object Manager >> type object name(Pipe Lining) in search bar >> click on the object.

Now click on “Fields & Relationships” >> New

Select Data type as a “Formula” and Click on Next

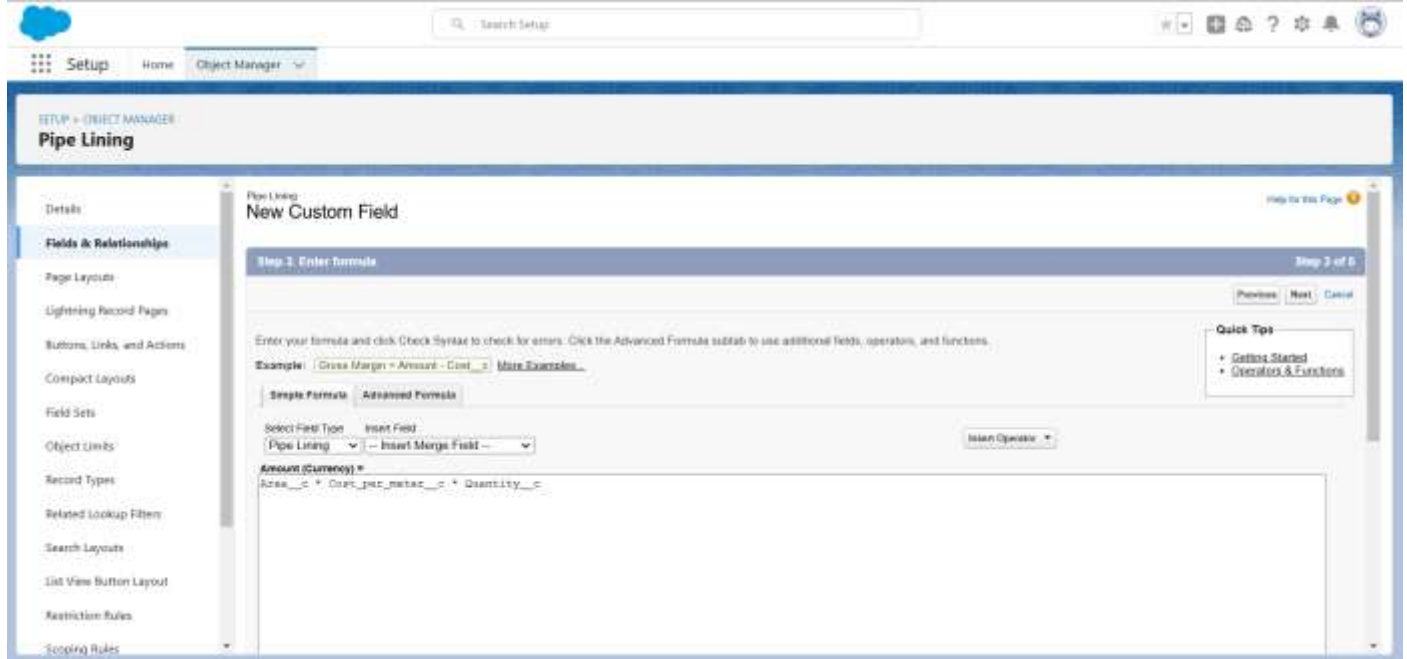
Fill the Above as following:

Field Label: Amount

Field Name : Amount

Formula Return Type : Select Currency

Enter Formula : $\text{Area_c} * \text{Cost_per_meter_c} * \text{Quantity_c}$ (Insert this fields using “Insert Field” Option)



Click on Next >> Next >> Save and new.

To create another fields in an object:

Go to setup >> click on Object Manager >> type object name(Pipe Lining) in search bar >> click on the object.

Now click on “Fields & Relationships” >> New

Select Data type as a “Picklist” and Click on Next

Fill the Above as following:

Field Label: Material Type

Field Name : Material_Type

Values : Select Enter values, with each value separated by a new line

Enter this values in box :

Iron

Metal

Aluminum

Setup > OBJECT MANAGER

Pipe Lining

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

Pipe Lining
New Custom Field

Step 2 of 4: Enter the details

Field Label:

Field Name:

Field Type:

Use global picklist value set: ☐

Enter values, with each value separated by a new line:

Display values alphabetically, not in the order entered: ☐

Use first value as default value: ☐

Restrict picklist to the values defined in the value set: ☒

Field Name:

Description:

Help for this Page

Previous Next Cancel

Click on Next >> Next >> Save and new.

To create another fields in an object:

Go to setup >> click on Object Manager >> type object name(Pipe Lining) in search bar >> click on the object.

Now click on “Fields & Relationships” >> New

Select Data type as a “Currency” and Click on Next

Fill the Above as following:

Field Label: Final Price

Field Name : Final_Price

Setup > OBJECT MANAGER

Pipe Lining

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

Pipe Lining
New Custom Field

Step 2 of 4: Enter the details

Field Label:

Field Name:

Field Type:

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 places can accept values up to "12345678.90".

Length: Number of digits to the left of the decimal point

Decimal Places: Number of digits to the right of the decimal point

Description:

Help Text:

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

Allow null values: ☐ Allow null values in this field

Add this field to existing custom report types that contain this entity: ☒

Default Value:

Help for this Page

Previous Next Cancel

Click on Next >> Next >> Save and new.

To create another fields in an object:

Go to setup >> click on Object Manager >> type object name(Pipe Lining) in search bar >> click on the object.

Now click on “Fields & Relationships” >> New

Select Data type as a “Email” and Click on Next

Fill the Above as following:

Field Label: Email

Field Name : Email

The screenshot shows the Salesforce Setup interface for the 'Pipe Lining' object. The 'Fields & Relationships' section is active, and the 'New' button has been clicked. The 'Field Label' and 'Field Name' are both set to 'Email'. The 'Description' and 'Help Text' fields are empty. The 'Required' checkbox is unchecked, and the 'Unique' checkbox is checked. The 'External ID' checkbox is unchecked. The 'Add this field to existing custom report types that contain this entity' checkbox is checked. The 'Default Value' field is empty, and the 'Show Formula Editor' checkbox is unchecked. The 'Next' button is visible at the bottom right.

Click on Next >> Next >> Save

Setup | Home | Object Manager

Search Setup

SETUP > OBJECT MANAGER

Pipe Lining

Details

Fields & Relationships
10 items, Sorted by Field Label

Q: Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Formula (Currency)		
Area	Area__c	Formula (Number)		
Cost per Meter	Cost_per_Meter__c	Number(16, 2)		
Created By	CreatedById	Lookup(User)		
Diameter	Diameter__c	Number(16, 2)		
Email	Email__c	Email		
Final Price	Final_Price__c	Currency(18, 0)		
Height	Height__c	Number(16, 2)		
Last Modified By	LastModifiedById	Lookup(User)		

Q: Search Setup

Setup | Home | Object Manager

Search Setup

SETUP > OBJECT MANAGER

Pipe Lining

Details

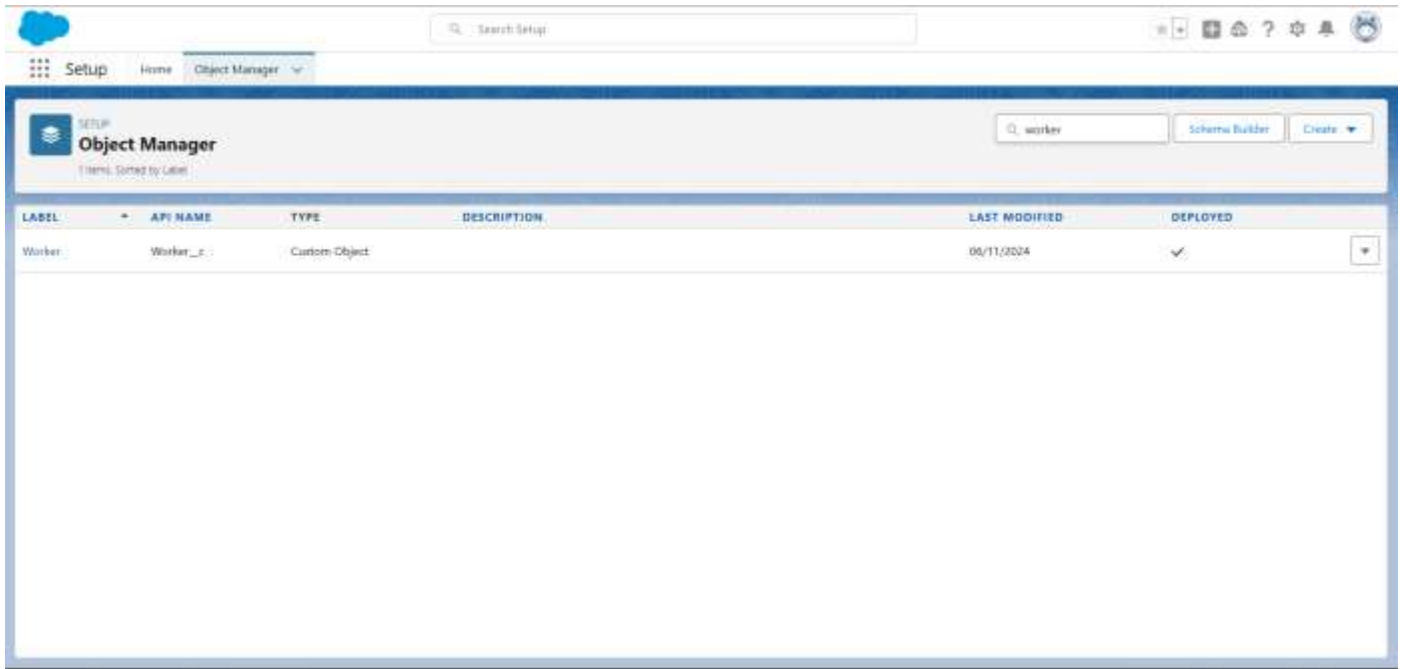
Fields & Relationships
16 items, Sorted by Field Label

Q: Quick Find New Deleted Fields Field Dependencies Set History Tracking

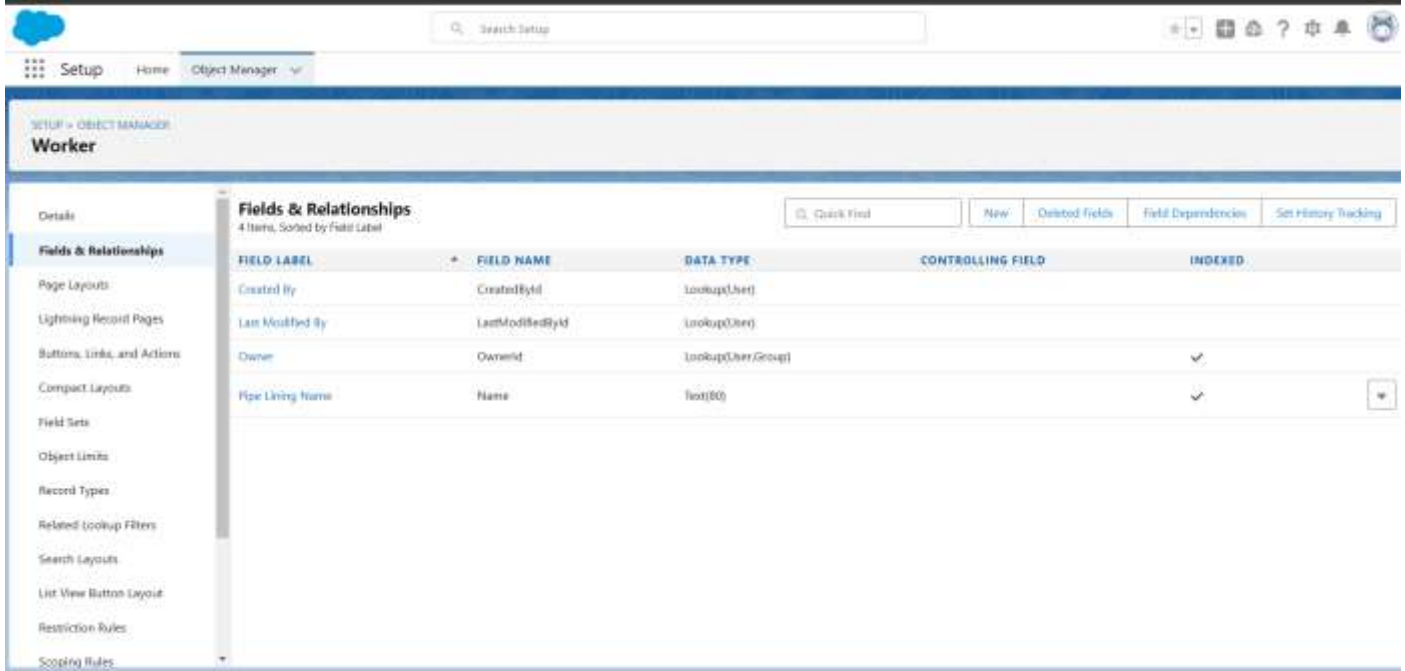
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Final Price	Final_Price__c	Currency(18, 0)		
Height	Height__c	Number(16, 2)		
Last Modified By	LastModifiedById	Lookup(User)		
Material Type	Material_Type__c	Picklist		
Name of the Company	Name_of_the_Company__c	Text(125)		
Name of the Owner	Name_of_the_Owner__c	Text(125)		
Owner	OwnerId	Lookup(Star/Group)		
Pipe Lining Name	Name	Text(80)		
Quantity	Quantity__c	Number(16, 2)		
Width	Width__c	Number(16, 2)		

Task-4:reation of fields for the Worker object

Go to setup >> click on Object Manager >> type object name(Worker) in search bar >> click on the object.



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



3. Select Data type as a “Text” and Click on Next

4. Fill the Above as following:

Field Label : Worker Name

Field Name : gets auto generated

Length : 125

Setup - OBJECT MANAGER
Worker

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

Worker
New Custom Field

Step 2: Enter the details Step 2 of 4

Field Label: Worker Name

Please enter the maximum length for a text field below.

Length:

Field Name: Worker_Name

Description:

Help Text:

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

Previous Next Cancel

Click on Next >> Next >> Save and new.

To create another fields in an object:

Go to setup >> click on Object Manager >> type object name(Worker) in search bar >> click on the object.

Now click on “Fields & Relationships” >> New

Select Data type as a “Number” and Click on Next

Fill the Above as following:

Field Label: Phone Number

Field Name : Phone_Number

Length : 10

Required :check box

Setup > OBJECT MANAGER > Worker

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

Worker: New Custom Field

Step 2: Enter the details

Field Label: Phone Number

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 places can accept values up to "12345678.90".

Length: 10

Decimal Places: 0

Field Name: Phone_number

Description:

Help Text:

Required: ☒ Always require a value in this field in order to save a record.

Unique: ☐ Do not allow duplicate values.

External ID: ☐ Set this field as the unique record identifier from an external system.

AI Prediction: ☐ Use this field to store AI prediction scores.

Click on Next >> Next >> Save and new.

To create another fields in an object:

Go to setup >> click on Object Manager >> type object name(Worker) in search bar >> click on the object.

Now click on “Fields & Relationships” >> New

Select Data type as a “Picklist” and Click on Next

Fill the Above as following:

Field Label: Designation

Field Name : Designation

Values : Select Enter values, with each value separated by a new line

Enter this values in box :

Accountant

Welder

Driller

Pitter

Manager

Setup - OBJECT MANAGER
Worker

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

Worker
New Custom Field

Step 2 of 4: Enter the details

Field Label: Salary

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 places can accept values up to "12345678.50".

Length: 10
Number of digits to the left of the decimal point

Decimal Places: 0
Number of digits to the right of the decimal point

Field Name: Salary

Description:

Help Text:

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

Default Value: [Show Formula Editor](#)

Click on Next >> Next >> Save and new.

Setup - OBJECT MANAGER
Worker

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

Fields & Relationships
8 Items, Sorted by Field Label

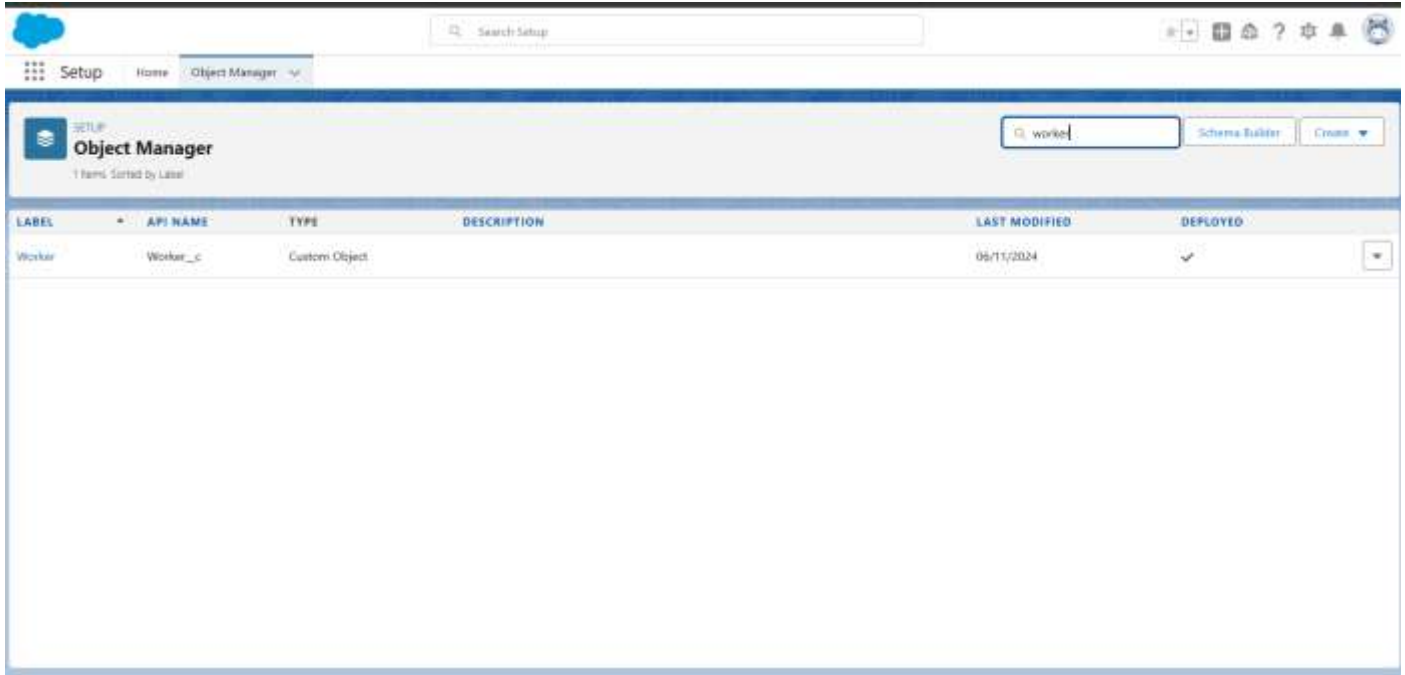
Quick Find: [] New Related Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Designation	Designation__c	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User, Group)		✓
Phone Number	Phone_Number__c	Number(10, 0)		
Primary Email Address	Name	Text(50)		✓
Salary	Salary__c	Currency(10, 0)		
Worker Name	Worker_Name__c	Text(125)		

Creation of Lookup fields

Creation of Lookup Field on Worker Object :

Go to setup>> click on Object Manager >> type object name(Worker) in the search bar >> click on the object.



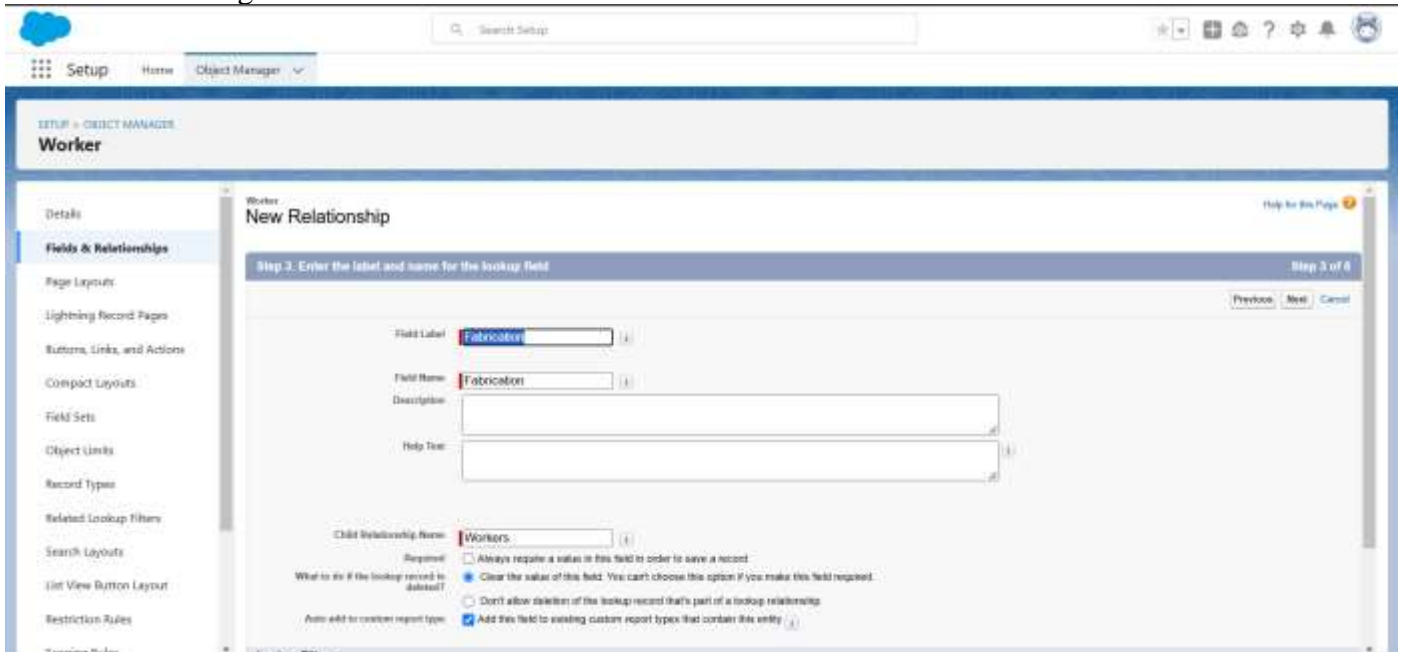
Now click on “Fields & Relationships” >> New

Select lookup relationship

Select the related object “Fabrication” and click next.

Field Name : Fabrication

Field label : Auto generated



Next >> Next >> Save.

Creation of Lookup Field on Worker Object :

Go to setup >> click on Object Manager >> type object name(Worker) in the search bar >> click on the object.

Now click on “Fields & Relationships” >> New

Select lookup relationship

Select the related object “Shed-Work” and click next.

Field Name : Shed-Work

Field label : Auto generated

The screenshot shows the Salesforce Setup interface for the 'Worker' object. The 'Fields & Relationships' section is active, and the 'New Relationship' step is displayed. The 'Field Label' is 'Shed Work', 'Field Name' is 'Shed_Work', and 'Child Relationship Name' is 'Workers'. The 'Required' checkbox is checked, and the 'Clear the value of this field' option is selected. The 'Auto add to custom report type' checkbox is also checked.

Next >> Next >> Save.

Creation of Lookup Field on Worker Object :

Go to setup >> click on Object Manager >> type object name(Worker) in the search bar >> click on the object.

Now click on “Fields & Relationships” >> New

Select lookup relationship

Select the related object “Pipe Lining” and click next.

Field Name : Pipe Lining

Field label : Auto generated

Setup - Object Manager - Worker

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

Worker

New Relationship

Step 3 of 8: Enter the label and name for the lookup field

Field Label: Pipe Lining

Field Name: Name

Description: Pipe Lining

Help Text: Pipe Lining

Child Relationship Name: Workorders

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.

Previous Next Cancel

Next >> Next >> Save.

Setup - Object Manager - Worker

Details

Fields & Relationships

11 items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Designation	Designation__c	Picklist		
Fabrication	Fabrication__c	Lookup(Fabrication)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User/Group)		✓
Phone Number	Phone_Number__c	Number(10, 0)		
Pipe Lining	Pipe_Lining__c	Lookup(Pipe Lining)		✓
Pipe Lining Name	Name	Text(30)		✓
Salary	Salary__c	Currency(16, 0)		
Shared Work	Shared_Work__c	Lookup(Shared Work)		✓

Milestone 6: Creation of Page Layouts

Here we have to create Four Page Layouts (For Drilling, For Welding, For Cutting, For Folding)

Task-1:

To create a Page Layout in Fabrication Object for Drilling

Go to the setup page >> click on object manager >> From drop down click edit for Fabrication object.

SETUP > OBJECT MANAGER

Fabrication

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

Enter Custom Object

Fabrication

Custom Object Definition Edit

Save New & Now Cancel

Custom Object Information

The singular and plural labels are used in lists, page layouts, and reports. Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label Example: Account

Plural Label Example: Accounts

Starts with vowel sound ☐

The Object Name is used when referencing the object via the API.

Object Name Example: Account

Description

Custom Sensitive Help Setting ☒ Open the standard Salesforce.com Help & Training window ☐ Open a window using a Visualforce page

Custom Name

Enter Record Name Label and Format

Click on the Page Layouts >> click New.

Setup Home Object Manager

SETUP > OBJECT MANAGER

Fabrication

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

Create New Page Layout

As an option, you may select an existing layout to clone. If you create a page layout without cloning, your page layout will not include the standard sections whose names are translated for your international users.

Existing Page Layout

Page Layout Name

Save Cancel

Enter details as

Page Layout Name : Drilling Page Layout

Setup > OBJECT MANAGER

Fabrication

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

Create New Page Layout

As an option, you may select an existing layout to clone. If you create a page layout without cloning, your page layout will not include the standard sections whose names are translated for your international users.

Existing Page Layout: --None--

Page Layout Name: Existing Page Layout

Save Cancel

Click on Save

Drag and Arrange the field as shown below

Setup > OBJECT MANAGER

Fabrication

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

Create New Page Layout

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields

Buttons

Quick Actions

Mobile & Lightning Actions

Expanded Lookups

Related Lists

Recent Items

Quick Find First Name

Field	Width	Fabrication Name	Record Type	Grouping
Section	100	Fabrication Name	Record Type	Grouping
Item Space	100	Final Price	Group of Companies	Width
Section	100	Created By	Group of the Owner	Width
Section	100	Last Modified By	Group of the Owner	Width
Section	100	Length	Group	Width

Company Details

Name of Company: Sample Text

Email: sarah.sample@company.com

Name of the Owner: Sample Text

Fields (Drag and Drop)

Field	Value
Fabrication Name	Sample Text
Length	435.05
Width	798.08
Width	578.04
Material Type	Sample Text

Area: 302.97

Cover per Meter: 47.000

Quality: 130.97

Amount: £123.45

Final Amount

Final Price: £123.45

Custom Links (Drag and Drop)

Click Save.

Setup - OBJECT MANAGER

Fabrication

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

Page Layouts

2 Items, Sorted by Page Layout Name

Quick Find

New Page Layout Assignment

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Drilling Page Layout	Guyathri P, 06/11/2024, 6:13 pm	Guyathri P, 06/11/2024, 6:29 pm
Fabrication Layout	Guyathri P, 06/11/2024, 11:55 am	Guyathri P, 06/11/2024, 4:40 pm

Go to the setup page >> click on object manager >> From drop down click edit for Fabrication object.

Click on the Page Layouts >> click New.

Enter details as

Page Layout Name : Welding Page Layout

Setup - OBJECT MANAGER

Fabrication

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

Create New Page Layout

As an option, you may select an existing layout to clone. If you create a page layout without cloning, your page layout will not include the standard sections whose names are reserved for your international users.

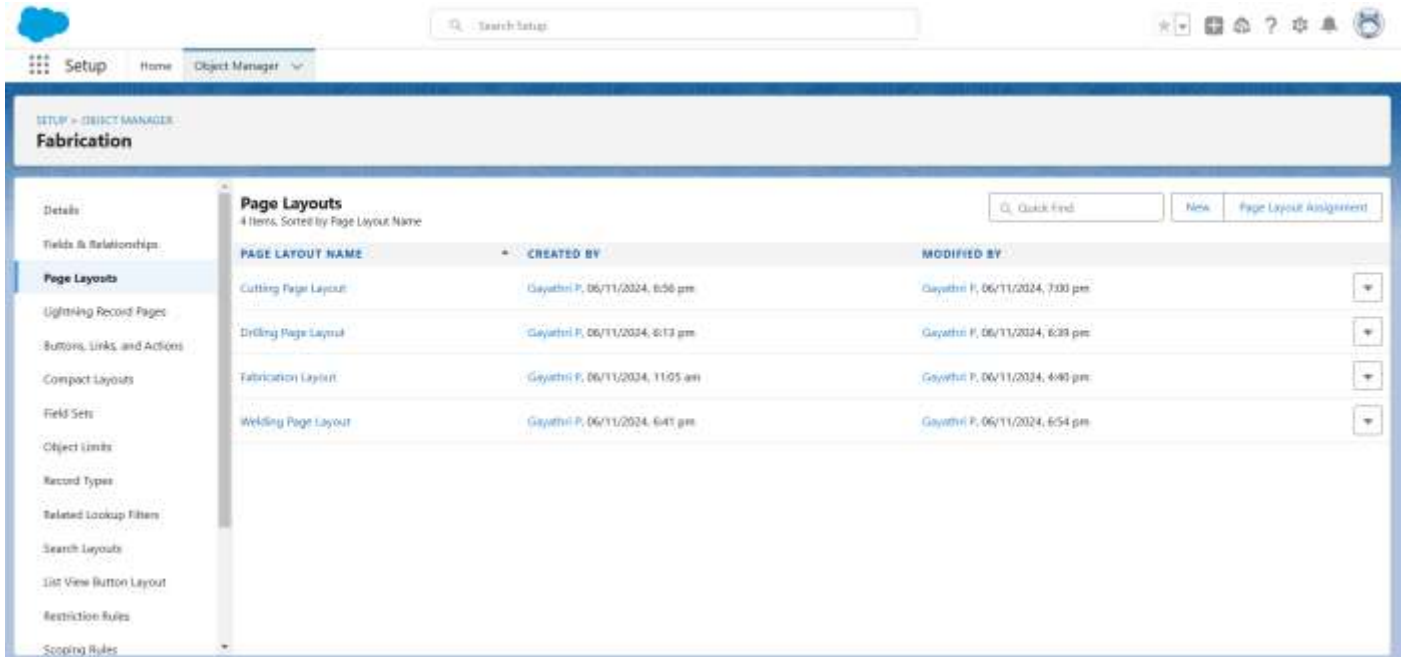
Existing Page Layout: None

Page Layout Name: Welding Page Layout

Save Cancel

Click on Save

Drag and Arrange the field as shown below



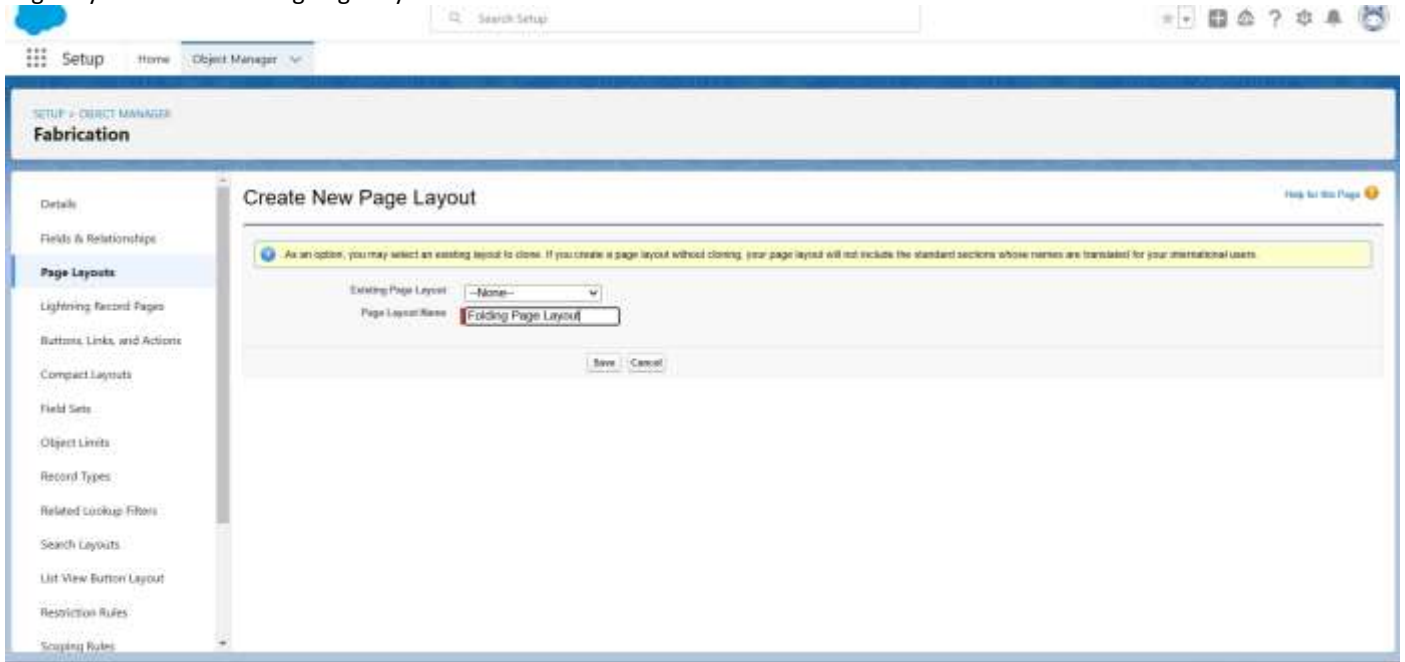
To create a Page Layout in Fabrication Object for Folding

Go to the setup page >> click on object manager >> From drop down click edit for Fabrication object.

Click on the Page Layouts >> click New.

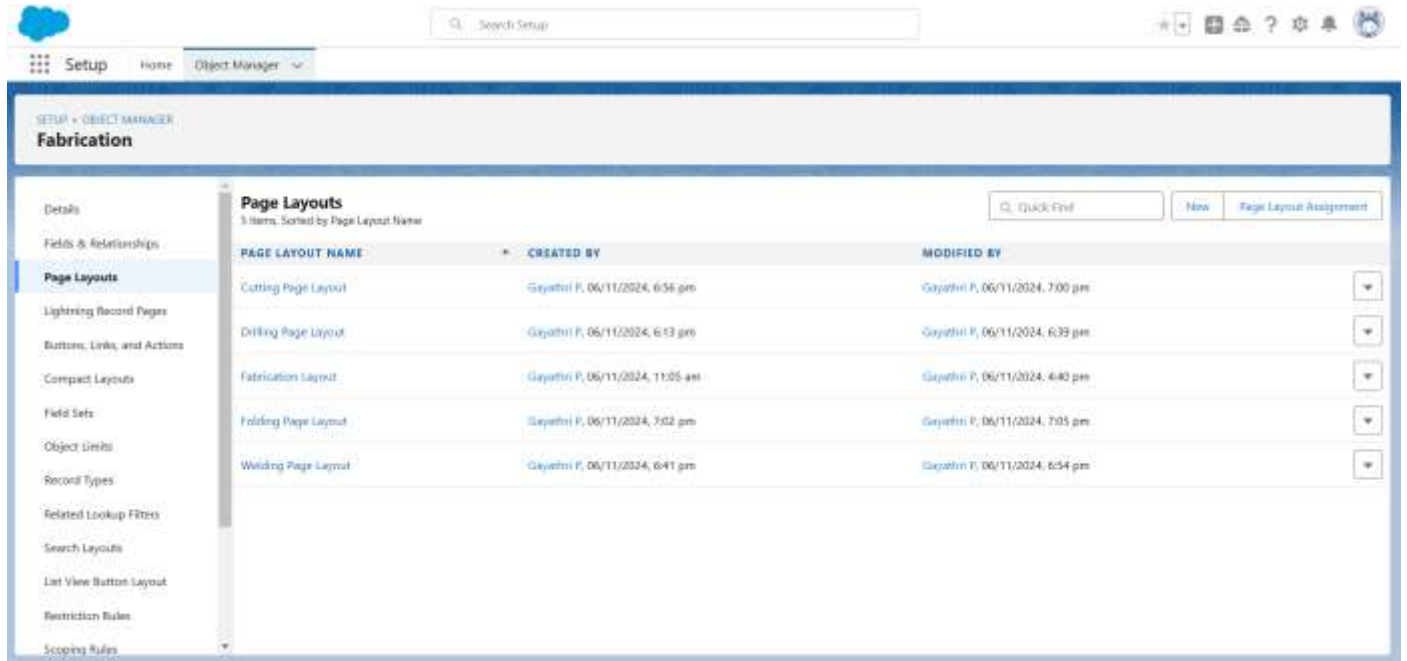
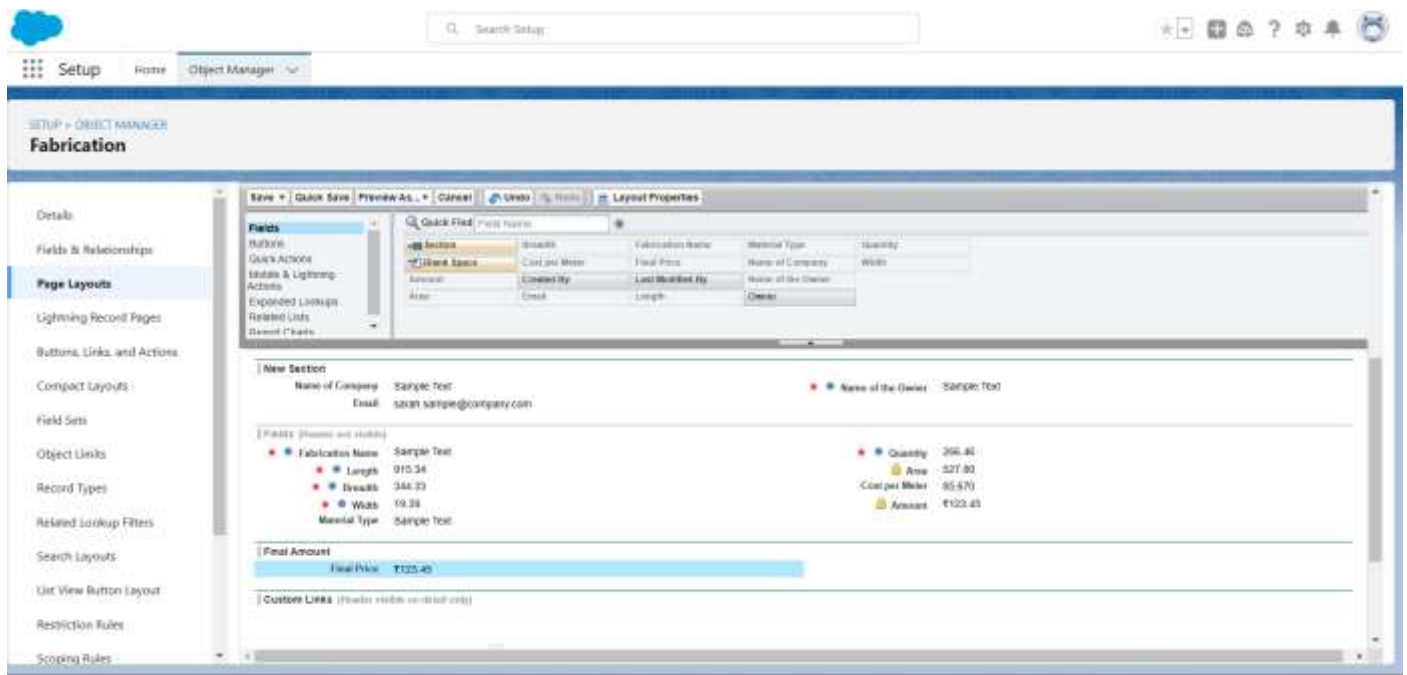
Enter details as

Page Layout Name : Folding Page Layout



Click on Save

Drag and Arrange the field as shown below



For the Fabrication Object we have to create 4 Record Types (Drilling, Welding, Cutting, Folding)

Go to the setup page >> click on object manager >> From drop down click edit for Fabrication object.

Setup > OBJECT MANAGER

Fabrication

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 Object Definition Edit

Custom Object Information

The singular and plural labels are used in table, page layouts, and reports. Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label: Example: Account

Plural Label: Example: Accounts

Start with visual editor: ☐

The Object name is used when referencing the object via the API.

Object Name: Example: Account

Description:

Context, Swatch, Help Setting

☒ Open the standard Salesforce.com Help & Training window

☐ Open a window using a Salesforce page

Context Name:

Enter Record Name Label and Format

Click on the Record Types >> click New.

Enter the details : For Record Types

Existing Record Types : Master

Record Type Label : Drilling

Record Type Name : Drilling

Active : Tick checkbox

Setup > OBJECT MANAGER

Fabrication

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

New Record Type

Fabrication

Step 1. Enter the details

Step 1 of 2

Enter a name and description for the new record type. The new record type will include all the picklist values from the existing record type selected below. After saving the new record type, you will be able to customize the picklist values.

Record Type

Existing Record Type:

Record Type Label:

Record Type Name:

Description:

Active: ☒

Select Make Available to give users assigned to this profile the ability to create and clone records of this record type, or assign this record type to existing records. To make the new record type the default for a profile, select Make Default. Users assigned to this record type can still view and edit records associated with record types not available for their profiles.

Profile Name	Record Types Currently Available	Make Available	Make Default
Analytics Cloud Integration User		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User		<input checked="" type="checkbox"/>	<input type="checkbox"/>

Click on Next

In Assign Page Layout

Apply one layout to all profiles : Select Drilling Page Layout

Setup Home Object Manager

Search Setup

Setup > OBJECT MANAGER

Fabrication

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

Help for this Page

New Record Type

Fabrication

Step 2 of 2: Assign page layouts

Fabrication Record Type Drilling

Record Type Name Drilling

Description

Select the page layout that users with this profile see for records with this record type. After saving, choose the picklist values that are available with this record type.

☒ Apply one layout to all profiles **Drilling Page Layout**

☐ Apply a different layout for each profile

Profile	Page Layout
Analytics Cloud Integration User	Drilling Page Layout
Analytics Cloud Security User	Drilling Page Layout
Chatter External User	Drilling Page Layout
Chatter Free User	Drilling Page Layout
Chatter Moderator User	Drilling Page Layout
Contact Manager	Drilling Page Layout
Core Org Data Proxy User	Drilling Page Layout

Click on Save

Setup Home Object Manager

Search Setup

Setup > OBJECT MANAGER

Fabrication

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

Help for this Page

Record Type

Drilling

Back to Custom Object: Fabrication

Use the Edit button to change the properties of this record type. Use the Edit links in the Picklist Values related list to choose the picklist values available for records with this record type.

Record Type Label Drilling

Record Type Name Drilling

Namespace Prefix

Description

Created By Gerdell.E 06/11/2024, 7:20 pm

Modified By Gerdell.E 06/11/2024, 7:20 pm

Active ☒

Picklists Available for Editing

Action	Field	Modified Date
Edit	Material Type	06/11/2024, 7:20 pm

Picklists Available for Editing Help

Similarly, Create the Record Types on Welding Page Layout, Cutting Page Layout and Folding Page Layout

Setup Home Object Manager

Search Setup

Setup > OBJECT MANAGER

Fabrication

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

Help for this Page

Enter a name and description for the new record type. The new record type will include all the picklist values from the existing record type selected below. After saving the new record type, you will be able to customize the picklist values.

Record Type

Existing Record Type **-Master-**

Record Type Label **Welding**

Record Type Name **Welding**

Description

Active ☒

Select Make Available to give users assigned to this profile the ability to create and clone records of this record type, or assign this record type to existing records. To make the new record type the default for a profile, select Make Default. Users assigned to this record type can still view and edit records associated with record types not available for their profiles.

Profile Name	Record Types Currently Available	<input type="checkbox"/> Make Available	<input type="checkbox"/> Make Default
Analytics Cloud Integration User	Drilling (Default)	<input type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	Drilling (Default)	<input type="checkbox"/>	<input type="checkbox"/>
Chatter External User	Drilling (Default)	<input type="checkbox"/>	<input type="checkbox"/>
Chatter Free User	Drilling (Default)	<input type="checkbox"/>	<input type="checkbox"/>
Chatter Moderator User	Drilling (Default)	<input type="checkbox"/>	<input type="checkbox"/>
Contact Manager	Drilling (Default)	<input type="checkbox"/>	<input type="checkbox"/>

Setup

Home

Object Manager

Setup > OBJECT MANAGER

Fabrication

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

New Record Type

Fabrication

Help for this Page

Step 1 of 2

Step 1. Enter the details

Enter a name and description for the new record type. The new record type will include all the picklist values from the existing record type selected below. After saving the new record type, you will be able to customize the picklist values.

Record Type

Existing Record Type: Master

Record Type Label: Cloning

Record Type Name: Cloning

Description:

Active: ☒

Select Make Available to give users assigned to this profile the ability to create and clone records of this record type, or assign this record type to existing records. To make the new record type the default for a profile, select Make Default. Users assigned to this record type can still view and edit records associated with record types not available for their profiles.

Profile Name	Record Types Currently Available	Make Available	Make Default
Analytics Cloud Integration User	Cloning (Default)	<input type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	Cloning (Default)	<input type="checkbox"/>	<input type="checkbox"/>

Setup

Home

Object Manager

Setup > OBJECT MANAGER

Fabrication

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

New Record Type

Fabrication

Help for this Page

Step 1 of 2

Step 1. Enter the details

Enter a name and description for the new record type. The new record type will include all the picklist values from the existing record type selected below. After saving the new record type, you will be able to customize the picklist values.

Record Type

Existing Record Type: Master

Record Type Label: Folding

Record Type Name: Folding

Description:

Active: ☒

Select Make Available to give users assigned to this profile the ability to create and clone records of this record type, or assign this record type to existing records. To make the new record type the default for a profile, select Make Default. Users assigned to this record type can still view and edit records associated with record types not available for their profiles.

Profile Name	Record Types Currently Available	Make Available	Make Default
Analytics Cloud Integration User	Cloning (Default)	<input type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	Cloning (Default)	<input type="checkbox"/>	<input type="checkbox"/>

Setup Home Object Manager

Search Setup

Setup > OBJECT MANAGER

Fabrication

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

Record Types

4 Items, Sorted by Record Type Label

Quick Find New Page Layout Assignment

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY	
Cutting		✓	Guyathri P, 06/11/2024, 7:34 pm	
Drilling		✓	Guyathri P, 06/11/2024, 7:30 pm	
Folding		✓	Guyathri P, 06/11/2024, 7:35 pm	
Welding		✓	Guyathri P, 06/11/2024, 7:33 pm	

Milestone 8: Validation rule:

Task1:

To create a validation rule to an Fabrication Object

Go to the setup page >> click on object manager >> From drop down click edit for Fabrication object.

Setup Home Object Manager

Search Setup

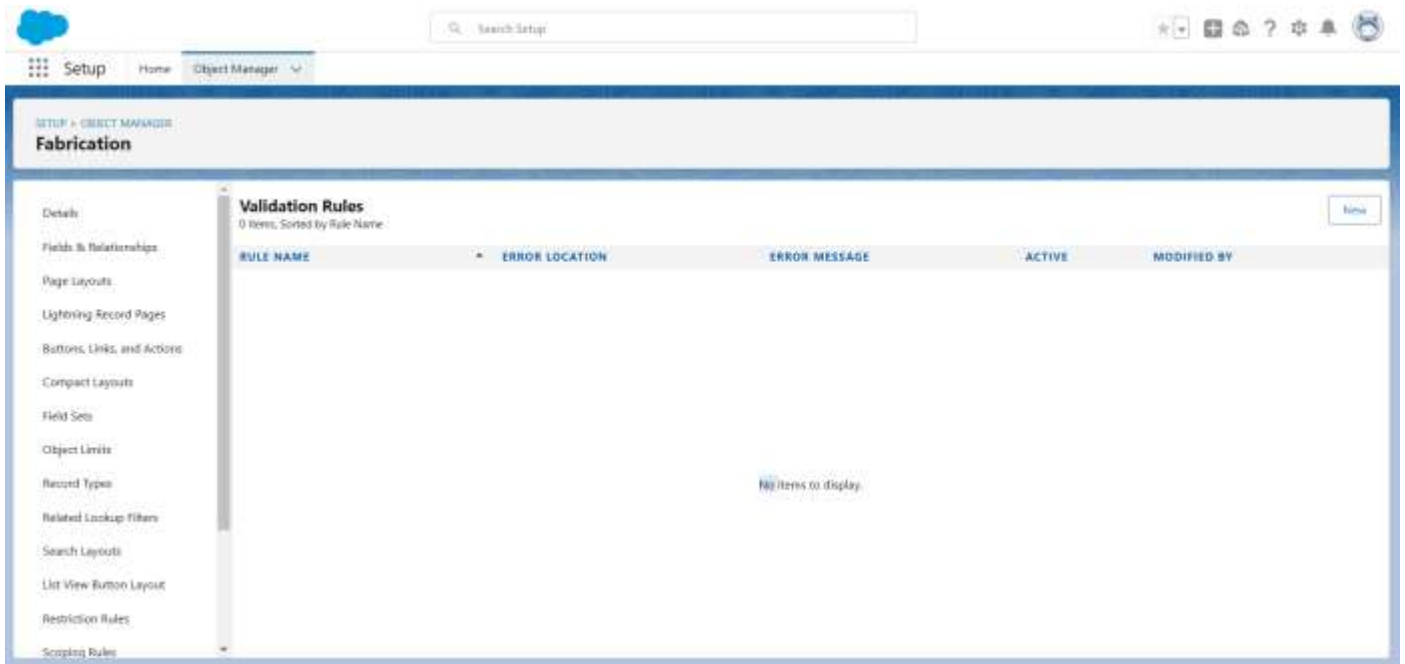
Setup Object Manager

1 Item, Sorted by Label

Label Schema Builder Create

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED	
Fabrication	Fabrication__c	Custom Object		06/11/2024	✓	

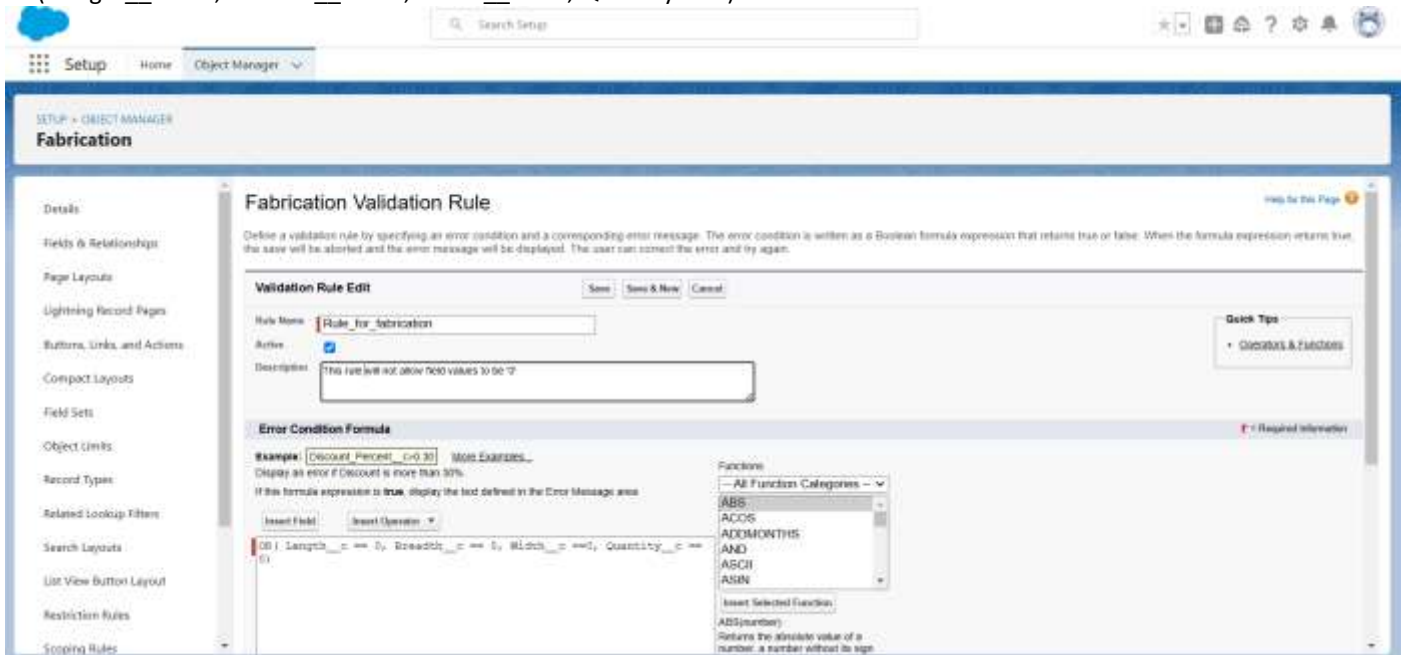
Click on the validation rule >> click New.



3. Enter the Rule name as “Rule_for_fabrication”.

4. Insert the Error Condition Formula as :

OR(Length__c == 0, Breadth__c == 0, Width__c ==0, Quantity__c == 0)



4. Enter the Error Message as “Length, Breadth, Width and Quantity Values should not be zero”, select the Error location as Top of Page and click Save.

Setup Search Setup

Setup Home Object Manager

Setup > OBJECT MANAGER

Fabrication

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Links

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Check Types: No errors found

Error Message

Example: Discount percent cannot exceed 99%

This message will appear when Error Condition formula is true

Error Message: Length, Breadth, Width and Quantity values should not be zero

This error message can either appear at the top of the page or below a specific field on the page

Error Location: ☒ Top of Page ☐ Field

Save Save & New Cancel

Create the Validation Rule for Shed-Work and Pipe Lining Object Similarly by following the Activity 1 Steps.

Setup Search Setup

Setup Home Object Manager

Setup > OBJECT MANAGER

Shed-Work

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Links

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Shed-Work Validation Rule

Define a validation rule by specifying an error condition and a corresponding error message. The error condition is written as a Soql formula expression that returns true or false. When the formula expression returns true, the save will be aborted and the error message will be displayed. The user can correct the error and try again.

Validation Rule Edit

Rule Name: Rule for Shed-Work

Active: ☒

Description:

Error Condition Formula

Example: Discount Percent > 99% **Users Examples...**

Display an error if Discount is more than 99%

If this formula expression is true, display the text defined in the Error Message area

Insert Field: Insert Operator

OR: Height__c > 0, Breadth__c > 0, Width__c > 0, Quantity__c > 0

Functions

ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN

Insert Selected Function

ABS(number)
Returns the absolute value of a number, a number without its sign

Quick Tip
+ Operators & Functions

Help for this Page

Setup

Home

Object Manager

Search Setup

Object Manager

Items, Sorted by Label

pipe

Schema Builder

Create

Label	API Name	Type	Description	Last Modified	Deployed
Pipe Lining	Pipe_Lining__c	Custom Object		06/11/2024	✓

Setup

Home

Object Manager

Setup > OBJECT MANAGER

Pipe Lining

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

Validation Rules

Validation Rules

0 Items, Sorted by Rule Name

Rule Name	Error Location	Error Message	Active	Modified By
No items to display.				

Search Setup

Setup

Home

Object Manager

Setup > OBJECT MANAGER

Pipe Lining

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

Validation Rules

Pipe Lining Validation Rule

Help for this Page

Define a validation rule by specifying an error condition and a corresponding error message. The error condition is written as a Boolean formula expression that returns true or false. When the formula expression returns true, the save will be aborted and the error message will be displayed. The user can correct the error and try again.

Validation Rule Edit

Save

Save & New

Cancel

Rule Name

Rule for Pipe Lining

Active

☒

Description

Quick Tip

• Operators & Functions

Error Condition Formula

F = Required Information

Example: `Discount__Percent > 0.30`

More Examples...

Display an error if Discount is more than 30%

If this formula expression is **true**, display the text defined in the Error Message area

Insert Field

Insert Operator

OR: `Diameter__c >= 6, Height__c >= 0, Width__c >= 0, Quantity__c >= 0`

Functions

— All Function Categories —

CASE-SAFEID

CEILING

CHR

CONTAINS

COS

CURRENCYRATE

Insert Selected Function

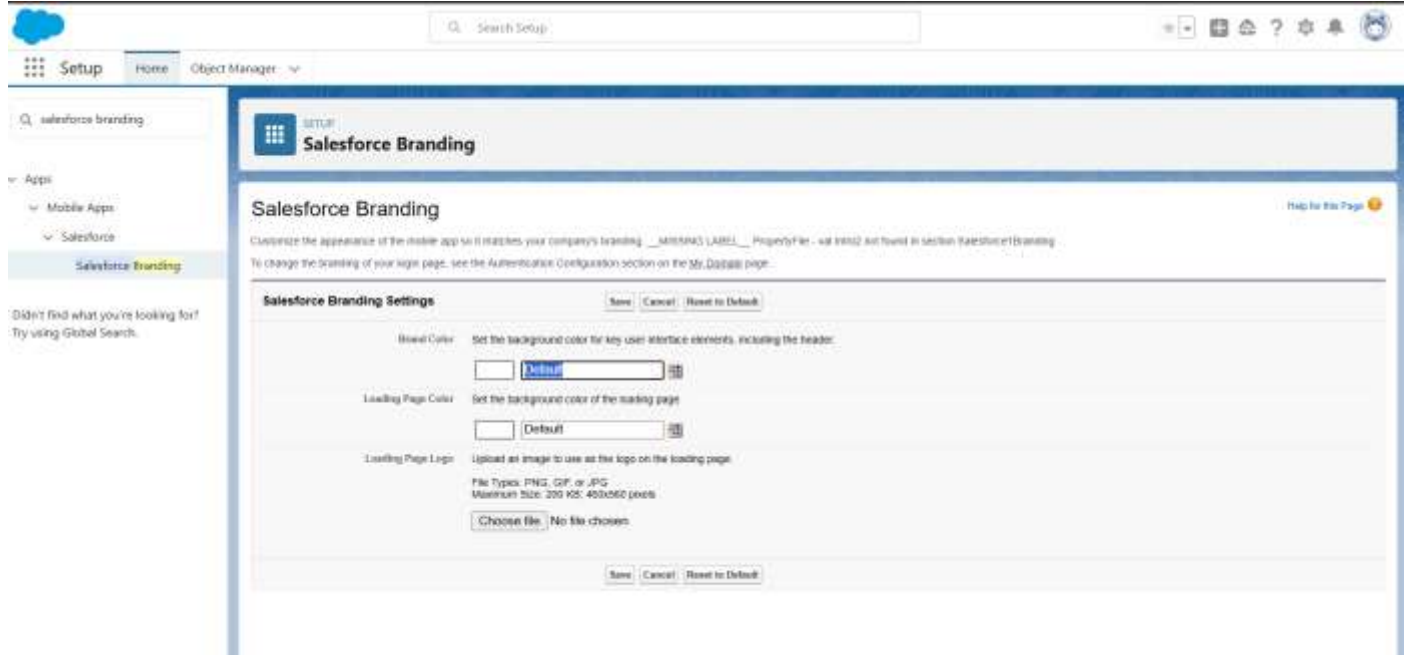
ABS(number)

Returns the absolute value of a number; a number without its sign.

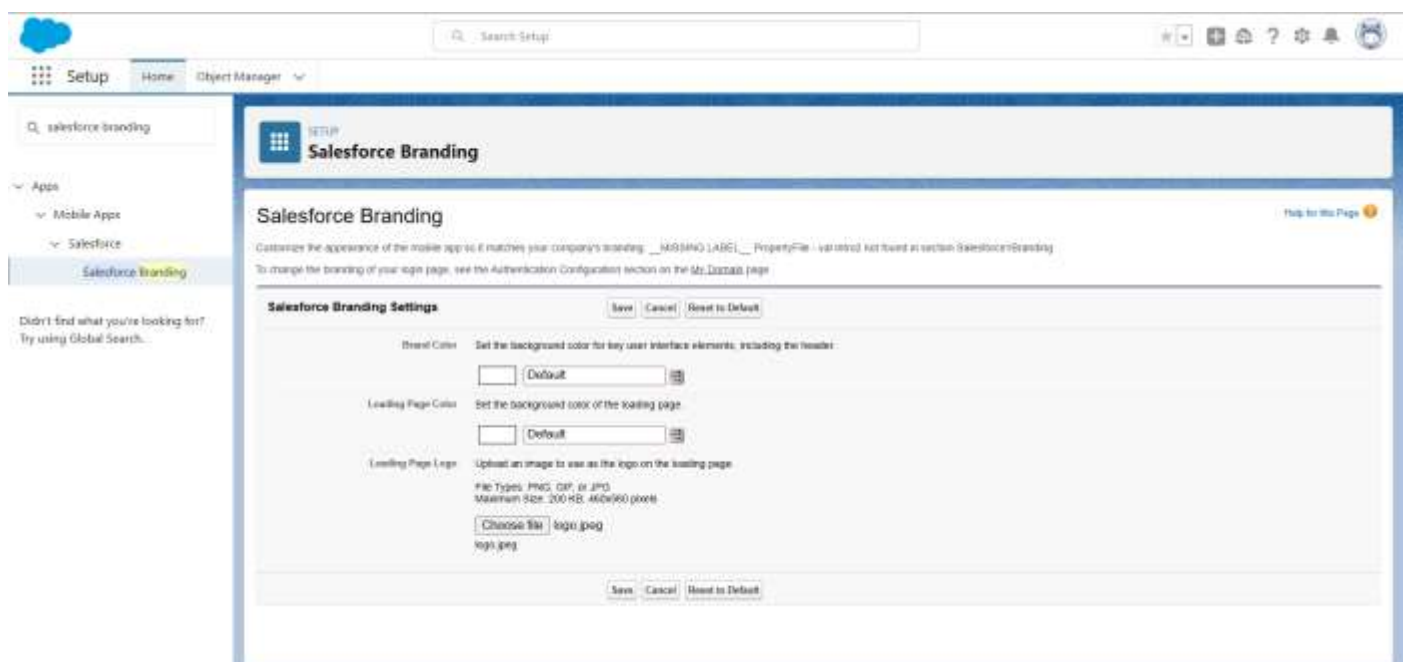
Milestone 9 : Email Templates

Upload Logo into Salesforce

Go to the setup page >> In quick find box search for Salesforce Branding >> Click on Edit.



In Loading Page Logo >> Choose File >> Select the image and click open >> Click on Save.



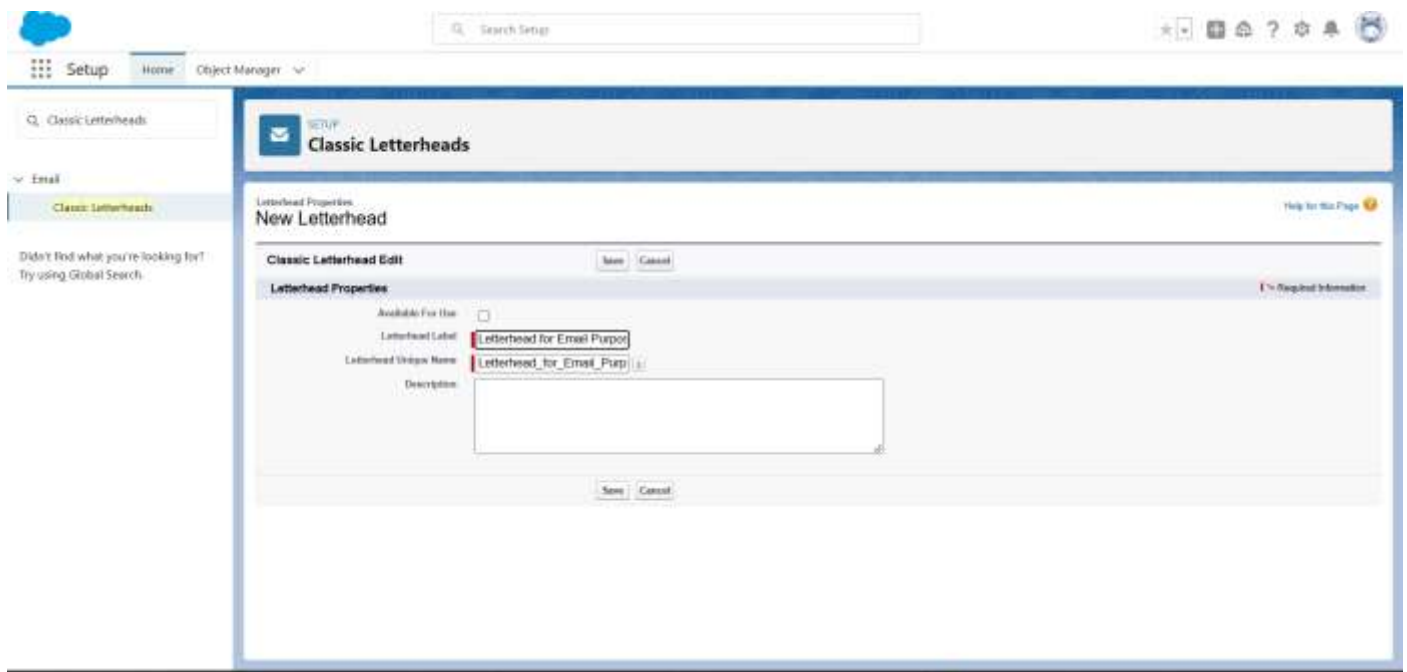
Creation of Letterhead for Email purpose.

Go to the setup page >> In quick find box search for Classic Letterheads >> Click on New Letterhead.

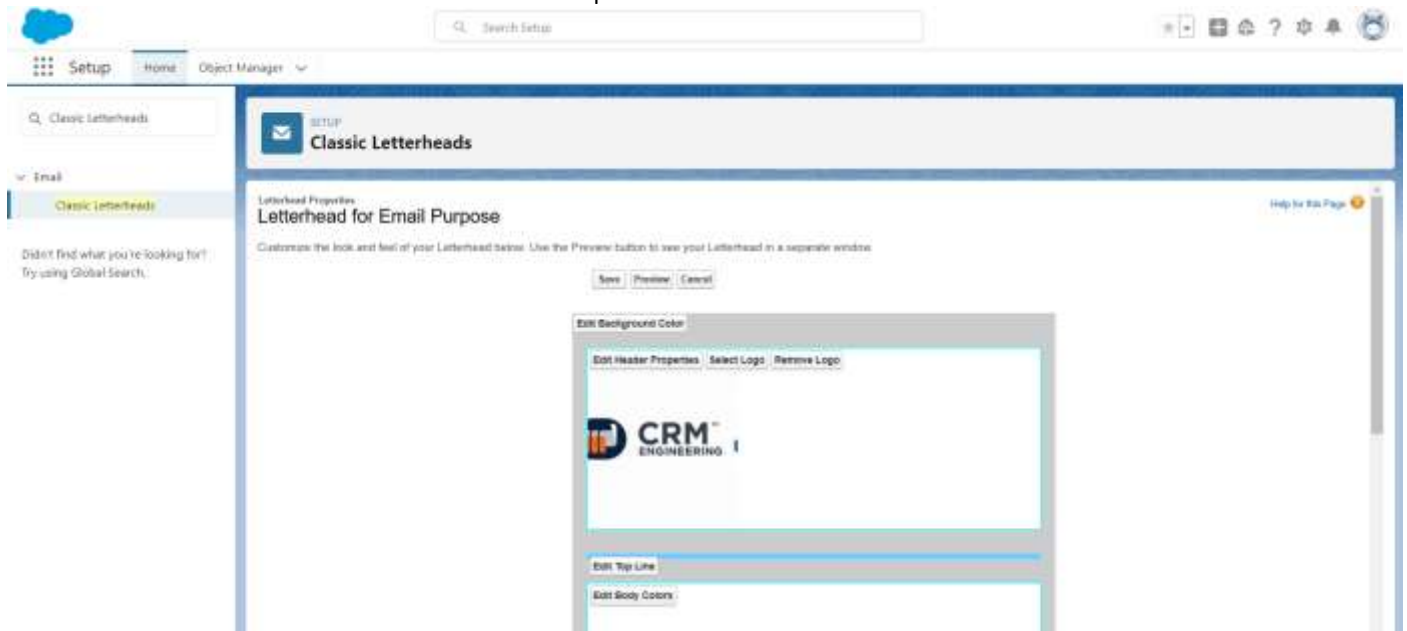
Check Available for use box.

Letterhead Label : Letterhead for Email Purpose

Letterhead Unique Name : Auto-populated



Click on Save >> Now click on Letterhead for Email Purpose then Edit Letterhead.



Click on select logo >> Now select the logo and click save.

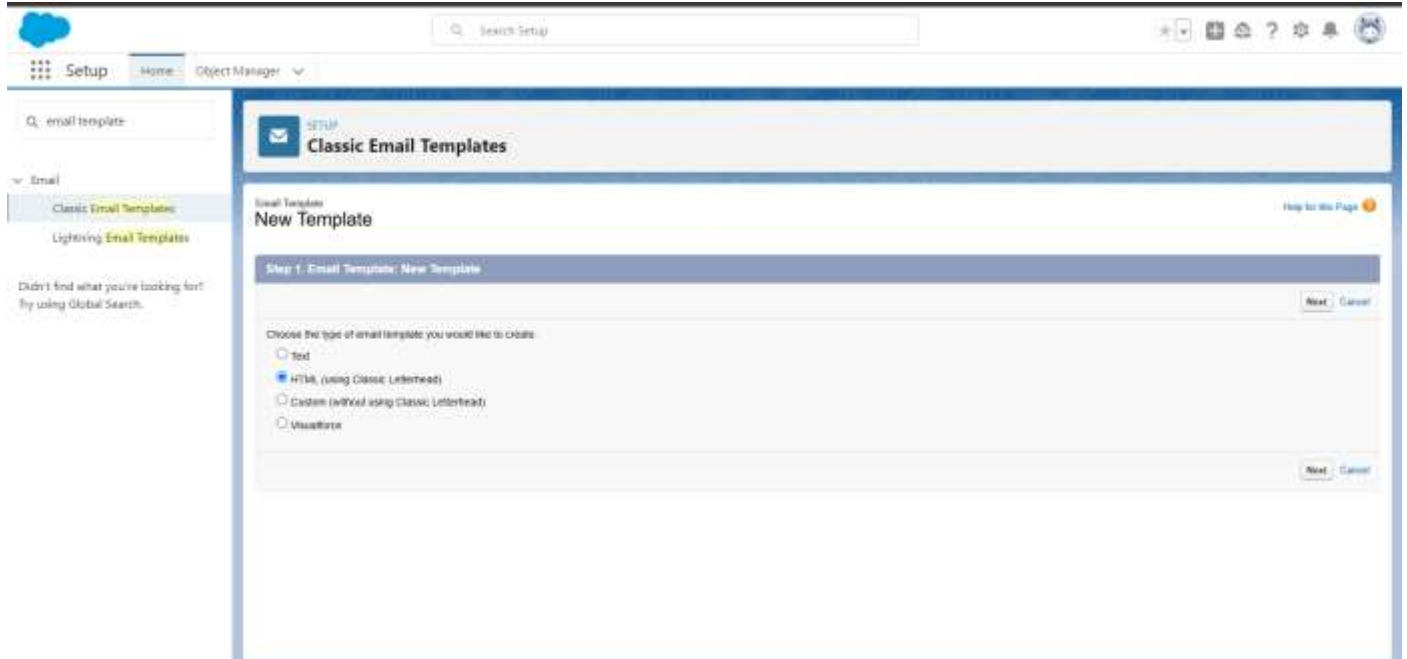
Task-3:

Create Email Template.

To create Email Template:

1. Go to setup in quick find box enter email template >> click on classic Email Template.
2. Click on >> New Email Template====>HTML (using Classic Letterhead)

Folder : Unfiled public Classic Email templates

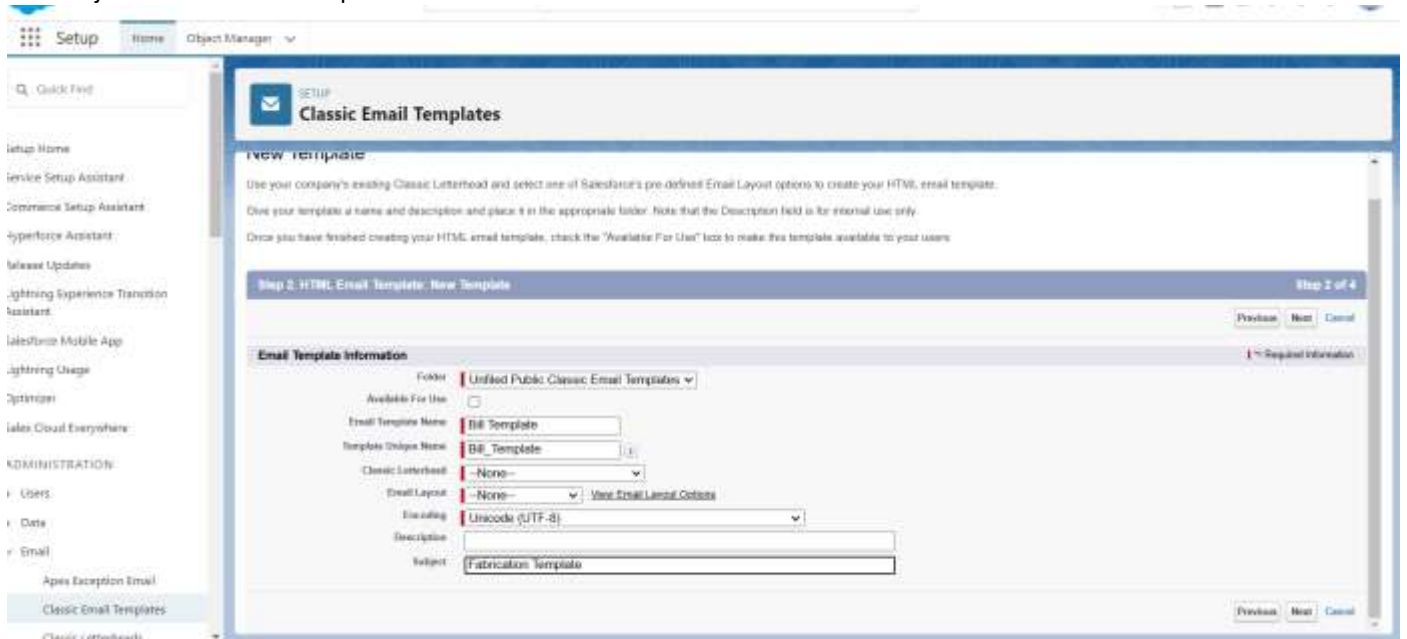


Click on available for use

3. Email Template Name is "Bill Template"

4. Template Unique Name : Auto populated

5. Subject : "Fabrication Template"



6. Email body :

Hello
 {!Fabrication__c.Name_of_the_Owner__c}{!Shed_Work__c.Name_of_the_Owner__c}{!Pipe_Lining__c.Name_of_Owner__c},
 I hope everything is going well in {!Fabrication__c.Name_of_Company__c}{!Shed_Work__c.Name_of_Company__c}{!Pipe_Lining__c.Name_of_Company__c} Company. I have been attached the required items for the work to be done. Please verify them.
 length = {!Fabrication__c.Length__c}{!Shed_Work__c.Height__c}{!Pipe_Lining__c.Height__c}, breadth =
 {!Fabrication__c.Length__c}{!Shed_Work__c.Breadth__c}, width =
 {!Fabrication__c.Width__c}{!Shed_Work__c.Width__c}{!Pipe_Lining__c.Width__c}, area =

{!Fabrication__c.Area__c}!Shed_Work__c.Area__c}!Pipe_Lining__c.Area__c}, The Final Price =
{!Fabrication__c.price__c}!Shed_Work__c.Price__c}!Pipe_Lining__c.Price__c}.

Thanks & Regards,

Engineering Works.

The screenshot shows the Salesforce Classic Email Templates setup interface. The left sidebar contains navigation links: Setup Home, Service Setup Assistant, Commerce Setup Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, Sales Cloud Everywhere, and ADMINISTRATION (Users, Data, Email). The main content area is titled "Classic Email Templates" and shows "Step 4 of 4: Create text-only version". A "Copy text from HTML version" button is present. The "Text-Only Email Content" section displays the following text:

Subject: Fabrication Template

Text Body:

Hello {!Fabrication__c.Name_of_the_Owner__c}!Shed_Work__c.Name_of_the_Owner__c}
{!Pipe_Lining__c.Name_of_the_Owner__c}

I hope everything is going well in {!Fabrication__c.Name_of_the_Owner__c}
{!Shed_Work__c.Name_of_the_Owner__c}!Pipe_Lining__c.Name_of_the_Owner__c}
Company. I have been attached the required items for the work to be done. Please verify them.

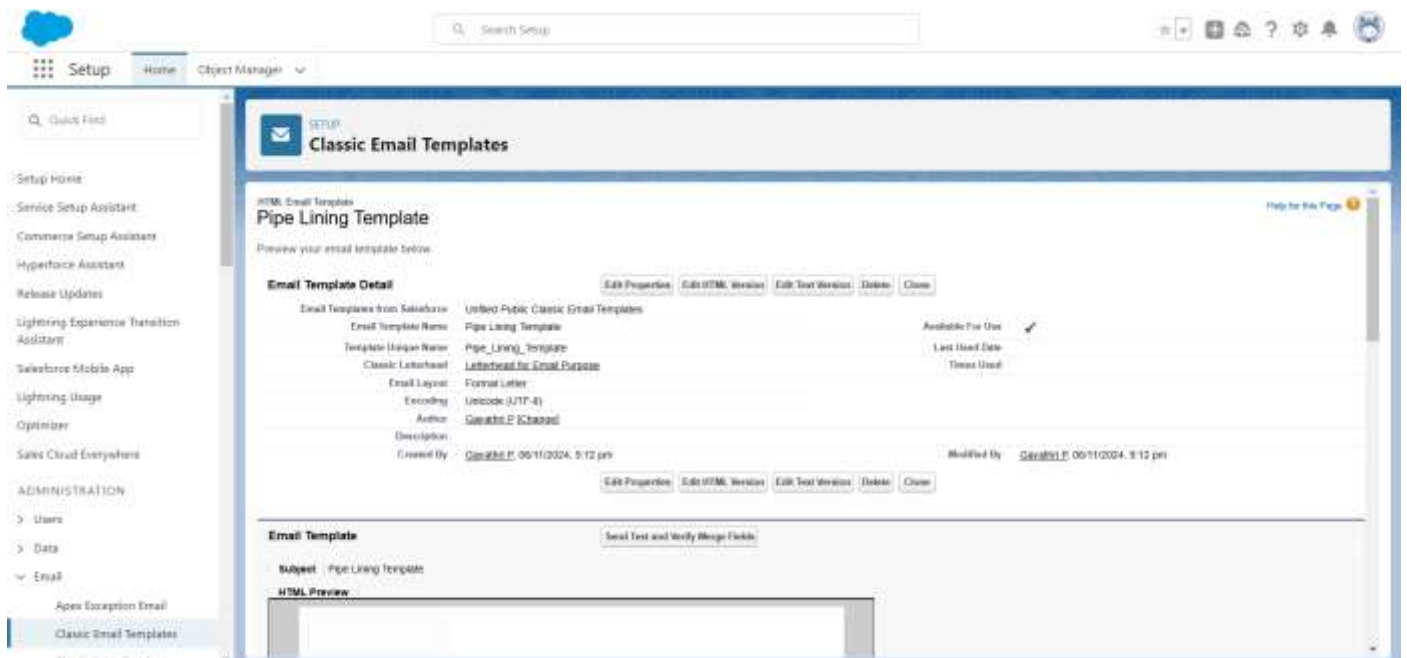
Length = {!Fabrication__c.Length__c}!Shed_Work__c.Length__c}
Pipe_Lining__c.Length__c, breadth = {!Fabrication__c.Length__c}
{!Shed_Work__c.Length__c} width = {!Fabrication__c.Width__c}!Shed_Work__c.Width__c}
Pipe_Lining__c.Width__c, Area = {!Fabrication__c.Area__c}!Shed_Work__c.Area__c}
Pipe_Lining__c.Area__c, The Final Price = {!Fabrication__c.Price__c}
{!Shed_Work__c.Price__c}!Pipe_Lining__c.Price__c}

Thanks & Regards,
Engineering Works

The screenshot shows the Salesforce Classic Email Templates setup interface for the "Shed work Template". The left sidebar is the same as the previous screenshot. The main content area is titled "Classic Email Templates" and shows the "Shed work Template" details. The "Email Template Detail" section includes the following information:

Field	Value
Email Template Name	Shed work Template
Template Unique Name	Shed_work
Classic Letterhead	Letterhead for Email Outgoing
Email Layout	Formal Letter
Encoding	Unicode (UTF-8)
Author	Ganesh P. Chaitanya
Description	
Created By	Ganesh P. Chaitanya
Created On	09/11/2024, 8:09 pm
Modified By	Ganesh P. Chaitanya
Modified On	09/11/2024, 9:09 pm

The "Email Template" section shows the "Subject" field with the value "Shed-work Template". The "HTML Preview" section is partially visible.



7. Save

Task-4:

Create Email Alert.

Go to setup in quick find box enter email Alert >> New Email Alert

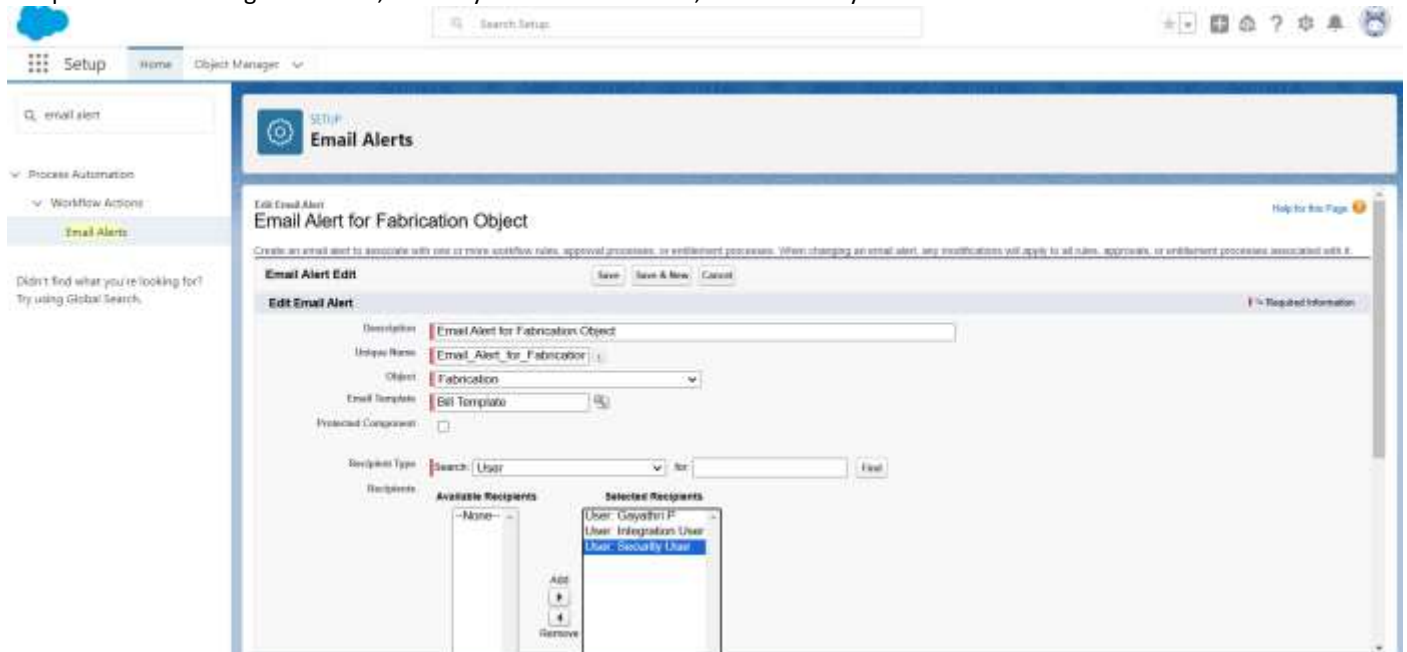
Description : Email Alert for Fabrication Object

Unique Name : Auto-Populated

Object : Fabrication

Email Template : select the template that is for fabrication Object

Recipients : User: Integration User, User : System Administrator, user : Security User



Click Save

Similarly create for Pipe-Lining and Shed-Work objects

Setup

Home

Object Manager

Search Setup

email alert

Process Automation

Workflow Actions

Email Alerts

Didn't find what you're looking for?
Try using Global Search.

SETUP

Email Alerts

Help for this Page

Full Email Alert

Email Alert for Pipe Lining Object

Create an email alert to associate with one or more workflow rules, approval processes, or entitlement processes. When changing an email alert, any modifications will apply to all rules, approvals, or entitlement processes associated with it.

Email Alert Edit

Save Save & New Cancel

2 Required Information

2

Required Information

Description

Email Alert for Pipe Lining Object

Unique Name

Email_Alert_for_Fabricator

Object

Pipe Lining

Email Template

Pipe Lining Template

Protected Component

Recipient Type

Search: User

for

Find

Recipients

Available Recipients

Selected Recipients

None

User: Gayathri P

User: Integration User

User: Security User

Add

Remove

Setup

Home

Object Manager

Search Setup

email alert

Process Automation

Workflow Actions

Email Alerts

Didn't find what you're looking for?
Try using Global Search.

SETUP

Email Alerts

Help for this Page

Full Email Alert

Email Alert for Shed Work Object

Create an email alert to associate with one or more workflow rules, approval processes, or entitlement processes. When changing an email alert, any modifications will apply to all rules, approvals, or entitlement processes associated with it.

Email Alert Edit

Save Save & New Cancel

2 Required Information

2

Required Information

Description

Email Alert for Shed Work Object

Unique Name

Email_Alert_for_Fabricator

Object

Shed-Work

Email Template

Shed work Template

Protected Component

Recipient Type

Search: User

for

Find

Recipients

Available Recipients

Selected Recipients

None

User: Gayathri P

User: Integration User

User: Security User

Add

Remove

Setup

Home

Object Manager

Search Setup

email alert

Process Automation

Workflow Actions

Email Alerts

Didn't find what you're looking for?
Try using Global Search.

SETUP

Email Alerts

Help for this Page

All Email Alerts

Create email alerts to send emails from a flow or other automation.

View: All Email Alerts

Create New Alert

ABCDEFGHIJKLMNOPQRSTUVWXYZ Other

Action	Description	Email Template Name	Object	Last Modified Date
Del	Email Alert for Fabrication Object	Bill Template	Fabrication	06/11/2024
Del	Email Alert for Pipe Lining Object	Pipe Lining Template	Pipe Lining	06/11/2024
Del	Email Alert for Shed Work Object	Shed work Template	Shed-Work	06/11/2024

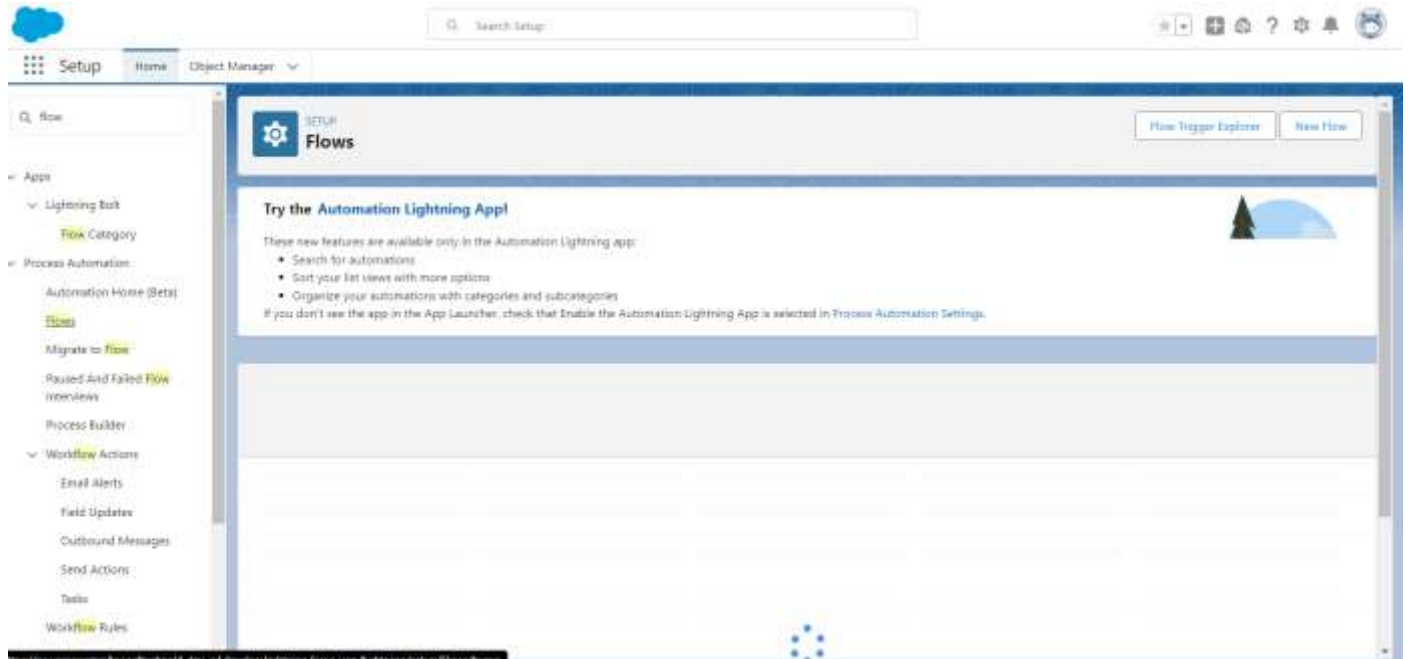
ABCDEFGHIJKLMNOPQRSTUVWXYZ Other

Milestone 10 : FLOWS

Task-1:

Create Flow to calculate Final Price on Fabrication Object based on Material Type

Go to setup >> type Flow in quick find box >> Click on the Flow and Select the New Flow.



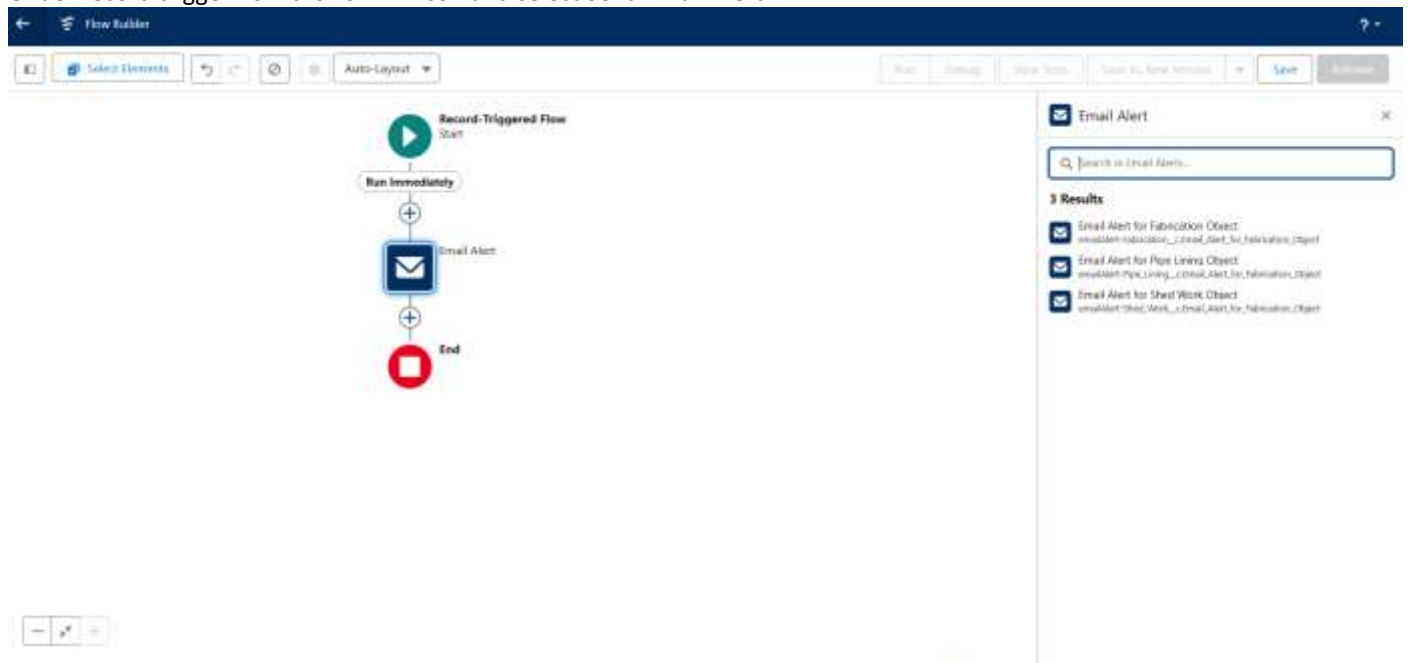
Select the record Triggered flow. Click on create.

Under Object select "Fabrication". Click on A record is created or updated.

Set Entry Conditions : None

Select Actions and Related Records

Under record trigger flow click on "+" icon and select Send Email Alert.



In New Action Select Fabrication Template.

Label : Mail

API Name : Mail

Record ID : {!\$Record.Id}

Click Done.

The screenshot displays the Salesforce Flow Builder interface. The main canvas shows a 'Record-Triggered Flow' starting with a 'Start' node, followed by a 'Run Immediately' node, then a 'Mail' action (Email Alert), and finally an 'End' node. The right-hand panel is titled 'Email Alert for Fabrication Object'. It contains fields for 'Label' (set to 'Mail') and 'API Name' (set to 'Mail'). Below these is a 'Description' field. A section titled 'Set Input Values for the Selected Action' shows a variable 'Record ID' being mapped to the 'Triggering Fabrication__c' field of the 'Email Alert for Fabrication Object' action.

Under record trigger flow click on “+” icon and select Decision

For New Decision :

Label : Material

Api Name : Material

For Outcome Details :

Label : Iron Material

Outcome API Name : Iron_Material

Condition Requirements to Execute Outcome : Condition Requirements to Execute Outcome

Resource : {!\$Record.Material_Type__c}

Operator : Equals

Value : Iron

Flow Builder interface showing a decision node configuration for "Iron Material".

Decision Node Configuration:

- Label:** Iron Material
- API Name:** Iron_Material
- Description:**
- Outcomes:**
 - OUTCOME ORDER:** +
 - Label:** Condition Requirements to Execute Outcome
 - Outcome API Name:** Condition_Requirements_to_Execute_Outcome
 - Condition Requirements to Execute Outcome:** All Conditions Are Met (AND)
 - Default Outcome:**
 - When to Execute Outcome:**
 - ☒ If the condition requirements are met
 - ☐ Only if the record that triggered the flow to run is updated to meet the condition requirements

The flow diagram on the left shows a "Record-Triggered Flow Start" leading to "Run Immediately", then "Mail Email Alert", followed by the "Iron Material Decision" node. The decision node has two paths: "Condition Requirement..." and "Default Outcome", both leading to "End".

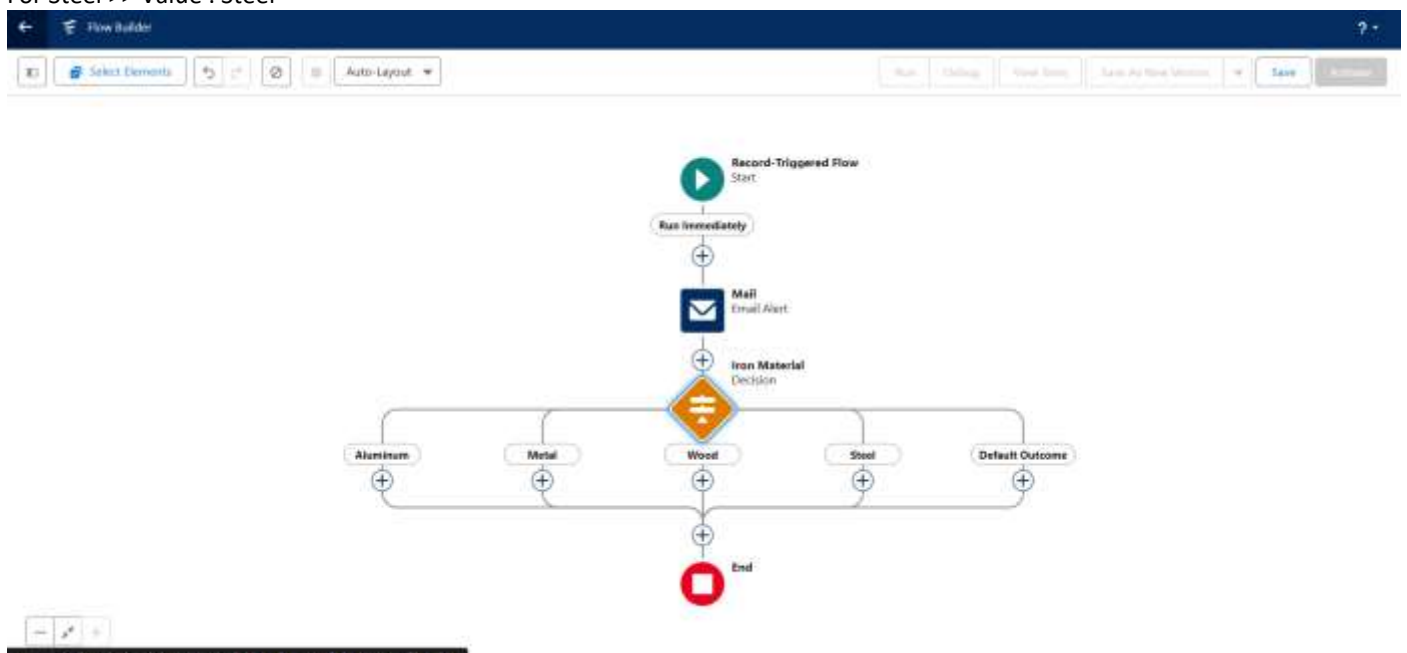
In the Outcome Order click '+' Icon and create another four outcomes for Aluminum, Metal, Wood, Steel(for each outcome keep the respective value)

For Aluminum >> Value : Aluminum

For Metal >> Value : Metal

For Wood >> Value : Wood

For Steel >> Value : Steel



The Outcome Details will be seen like below :

Under Iron Material click on "+" icon and select Update Related Record.

Label : For Iron

API Name : For_Iron

How to Find Records to Update and Set Their Value : Select Use the fabrication record that triggered the flow

Set Filter Conditions : None—Always Update Record

Set Field Values for the Fabrication Record

Field : Final_price__c

For Value click on New resource

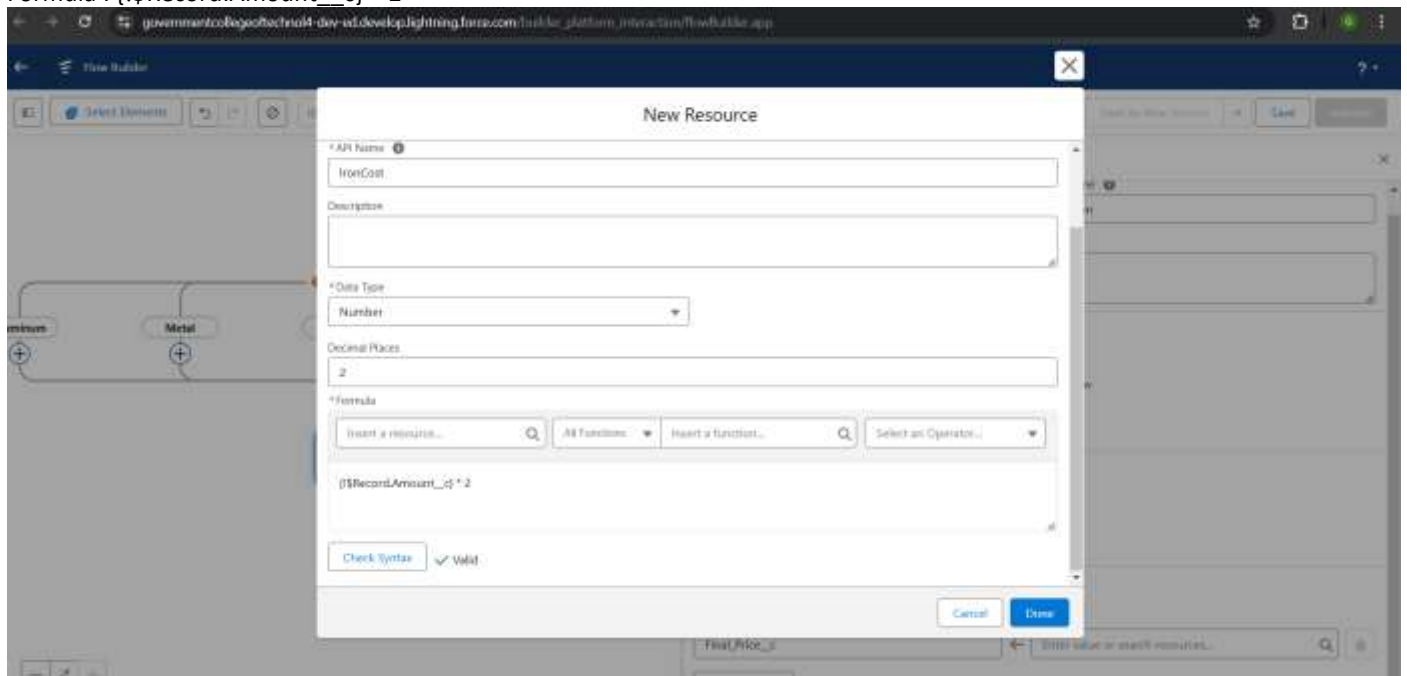
In Resource Type : Select Formula

API Name : IronCost

Data Type : Number

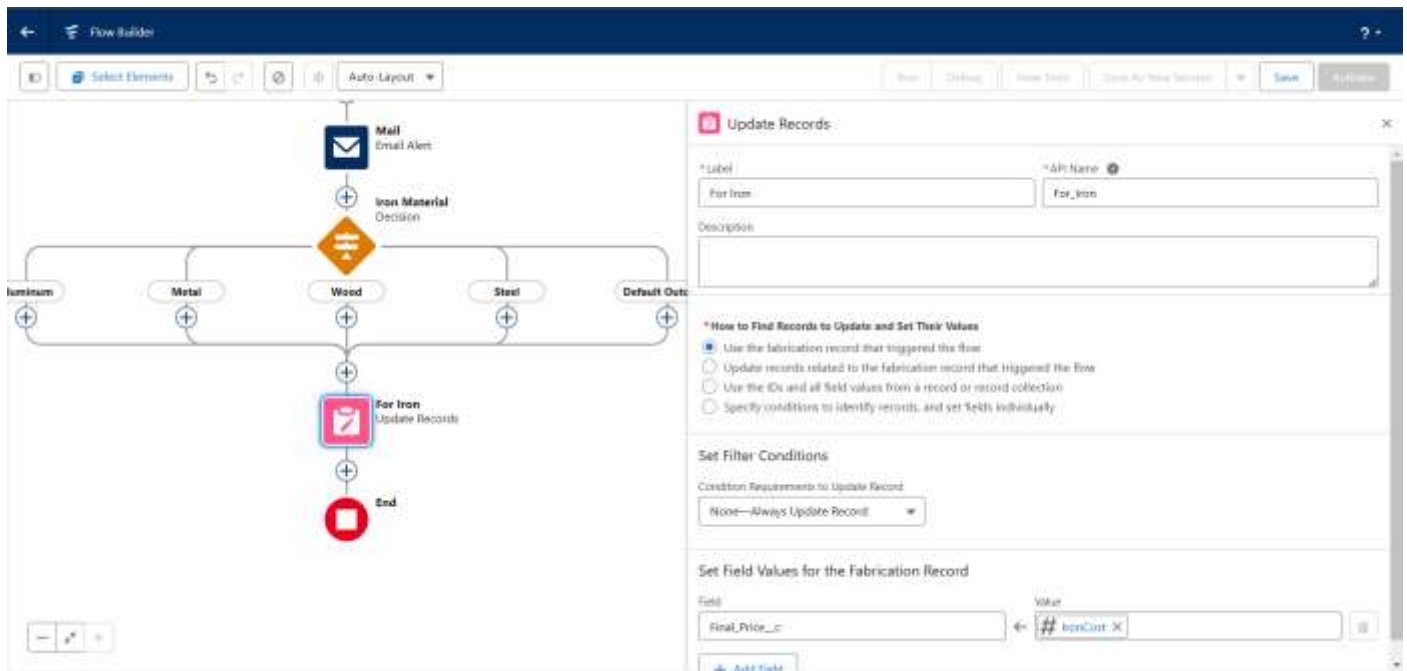
Decimal Places : 2

Formula : $\{!\$Record.Amount_c\} * 2$



Click Done

After clicking Done, it would look like



Under Aluminum Material click on “+” icon and select Update Related Record.

Label : For Aluminum

API Name : For_Aluminum

How to Find Records to Update and Set Their Value : Select Use the fabrication record that triggered the flow

Set Filter Conditions : None—Always Update Record

Set Field Values for the Fabrication Record

Field : Final_price__c

For Value click on New resource

In Resource Type : Select Formula

API Name : AluminumCost

Data Type : Number

Decimal Places : 2

Formula : $\{!\$Record.Amount_c\} * 1.8$

Click Done

The screenshot shows the Flow Builder interface for 'Fabrication Flow - V1'. The flow consists of three parallel paths, each starting with a material type (Iron Material, Aluminum Material, Metal Material) followed by an 'Update Records' step and an 'End' node. The 'Update Records' configuration panel is open for the 'For Metal Update Records' step. The panel includes fields for Label ('For Aluminum'), API Name ('For_Aluminum'), and Description. It also has sections for 'How to Find Records to Update and Set Their Values', 'Set Filter Conditions', and 'Set Field Values for the Fabrication Record'. The 'Set Field Values' section shows 'Final_Price__c' as the field and '# AluminumCost' as the value.

Under Metal Material click on “+” icon and select Update Related Record.

Label : For Metal

API Name : For_Metal

How to Find Records to Update and Set Their Value : Select Use the fabrication record that triggered the flow

Set Filter Conditions : None—Always Update Record

Set Field Values for the Fabrication Record

Field : Final_price__c

For Value click on New resource

In Resource Type : Select Formula

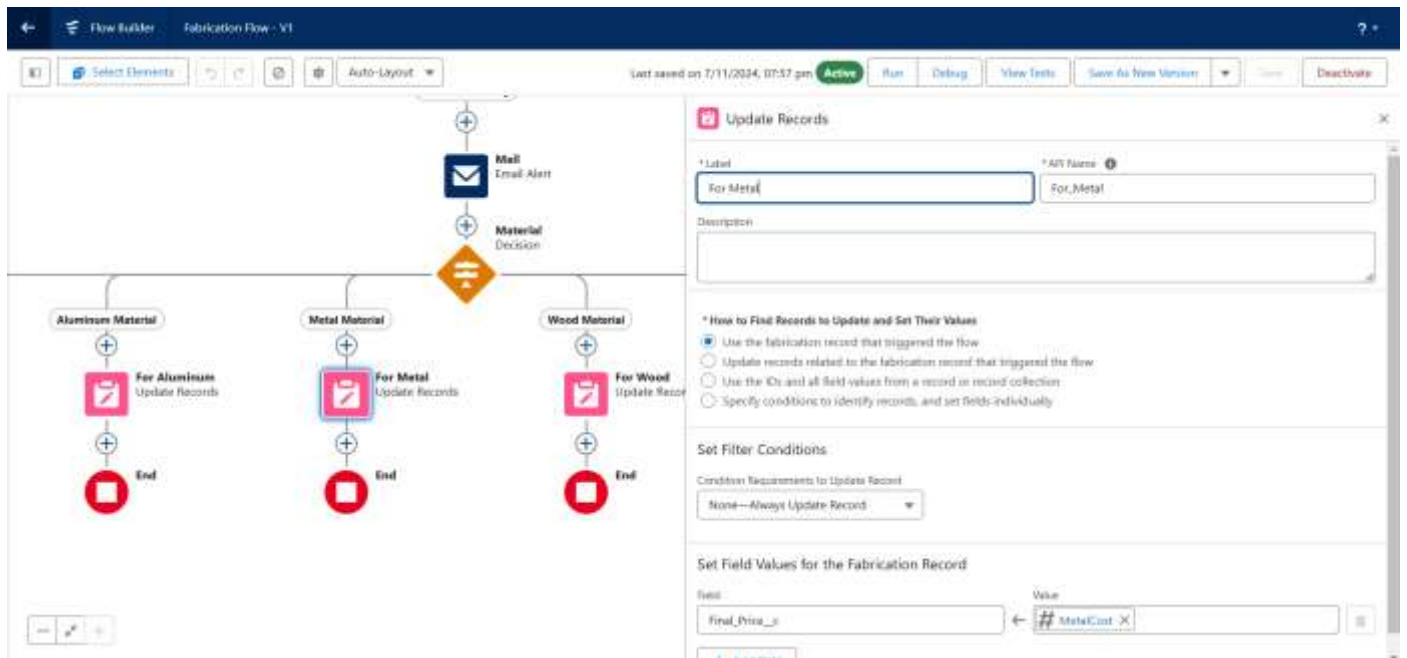
API Name : MetalCost

Data Type : Number

Decimal Places : 2

Formula : $\{!\$Record.Amount_c\} * 1.6$

Click Done



Under WoodMaterial click on “+” icon and select Update Related Record.

Label : For Wood

API Name : For_Wood

How to Find Records to Update and Set Their Value : Select Use the fabrication record that triggered the flow

Set Filter Conditions : None—Always Update Record

Set Field Values for the Fabrication Record

Field : Final_price__c

For Value click on New resource

In Resource Type : Select Formula

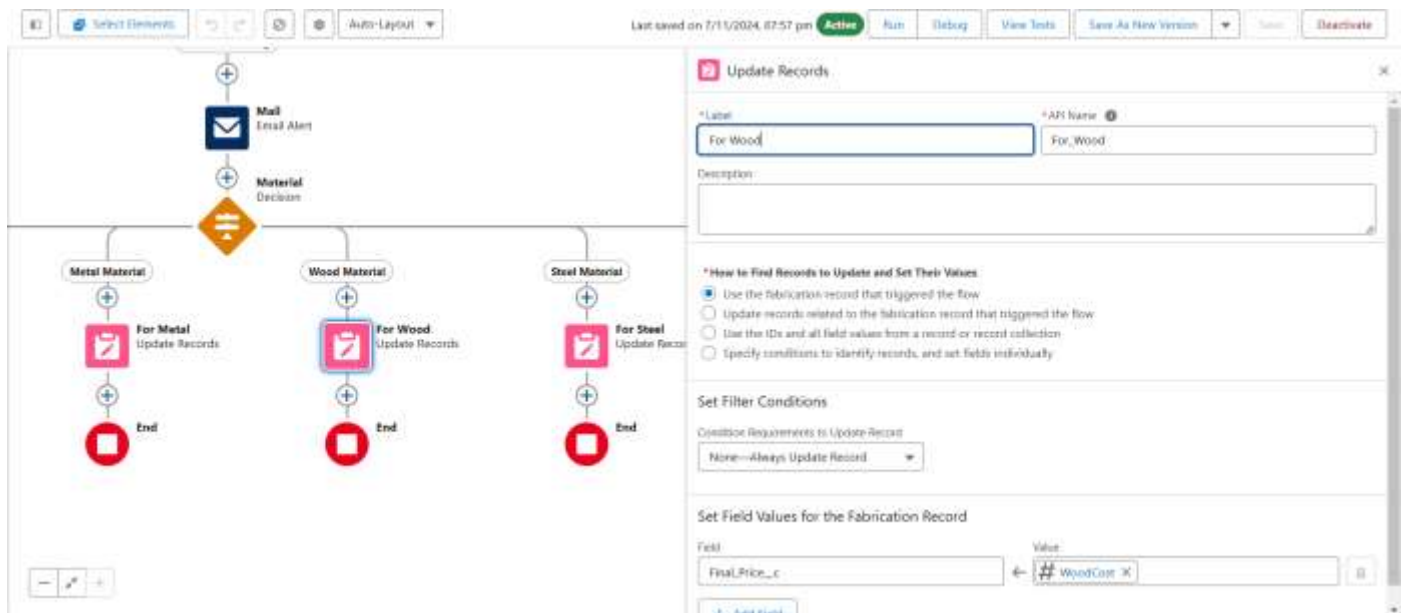
API Name : WoodCost

Data Type : Number

Decimal Places : 2

Formula : $\{!\$Record.Amount_c\} * 1.4$

Click Done



Under Steel Material click on “+” icon and select Update Related Record.

Label : For Steel

API Name : For_Steel

How to Find Records to Update and Set Their Value : Select Use the fabrication record that triggered the flow

Set Filter Conditions : None—Always Update Record

Set Field Values for the Fabrication Record

Field : Final_price__c

For Value click on New resource

In Resource Type : Select Formula

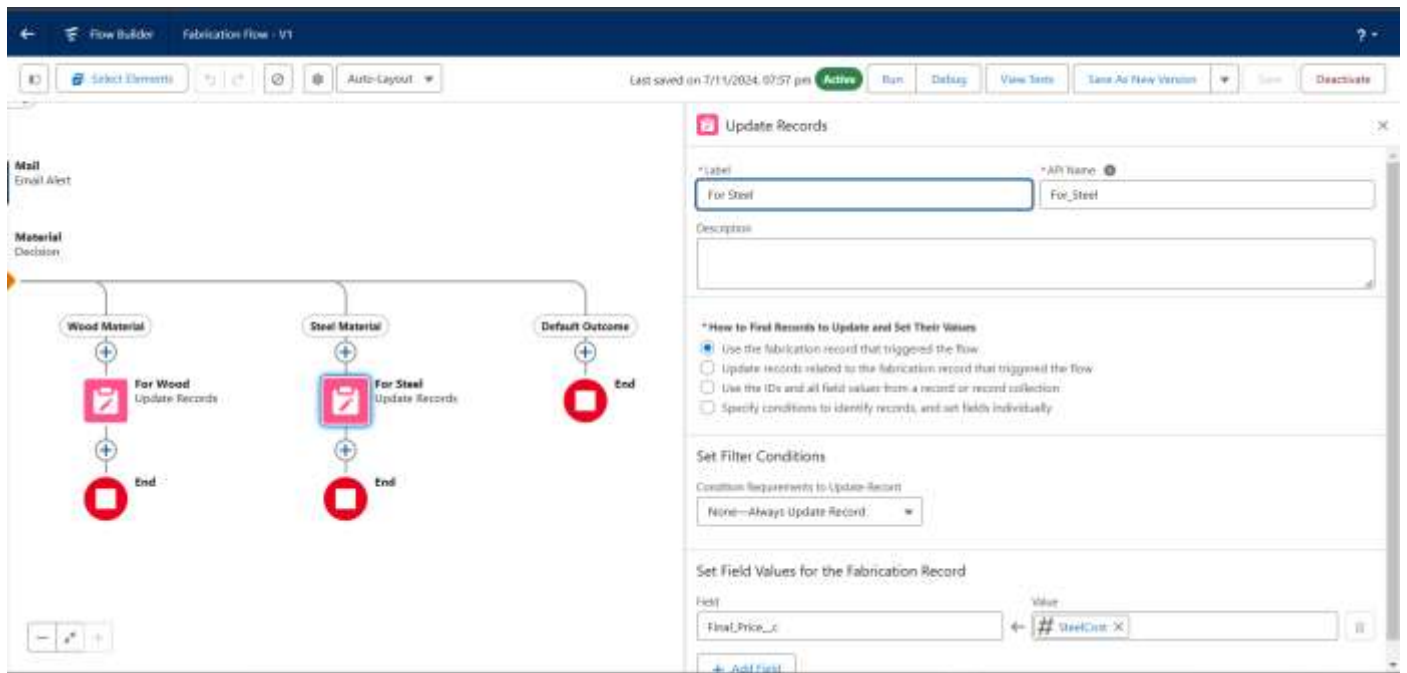
API Name : SteelCost

Data Type : Number

Decimal Places : 2

Formula : $\{!\$Record.Amount_c\} * 1.2$

Click Done



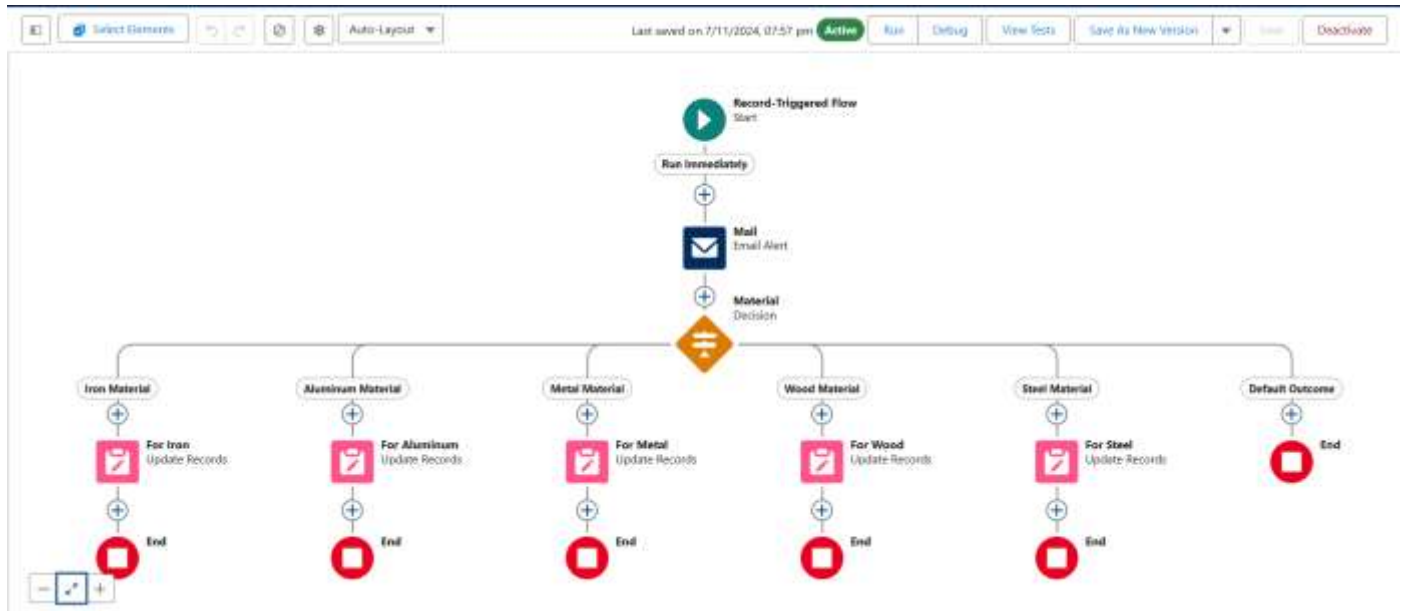
Click on Save

Flow Label : Fabrication Flow

Flow API Name : Fabrication_Flow

Click Save and then active

The Flow will like this :

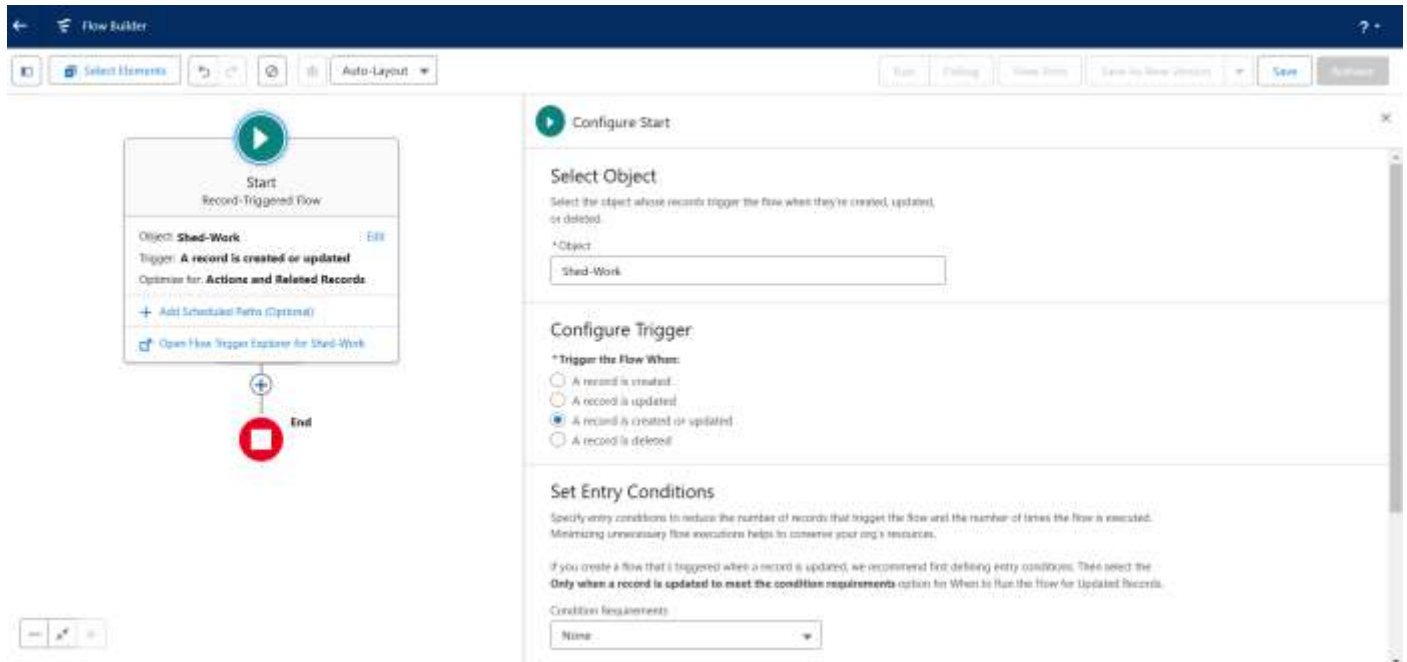


Create Flow to calculate Final Price on Shed Work Object based on Material Type
Go to setup >> type Flow in quick find box >> Click on the Flow and Select the New Flow.

Select the record Triggered flow.Click on create.

Under Object select "Shed Work". Click on A record is created or updated.

Set Entry Conditions : None



Select Actions and Related Records

Under record trigger flow click on “+” icon and select Send Email Alert.

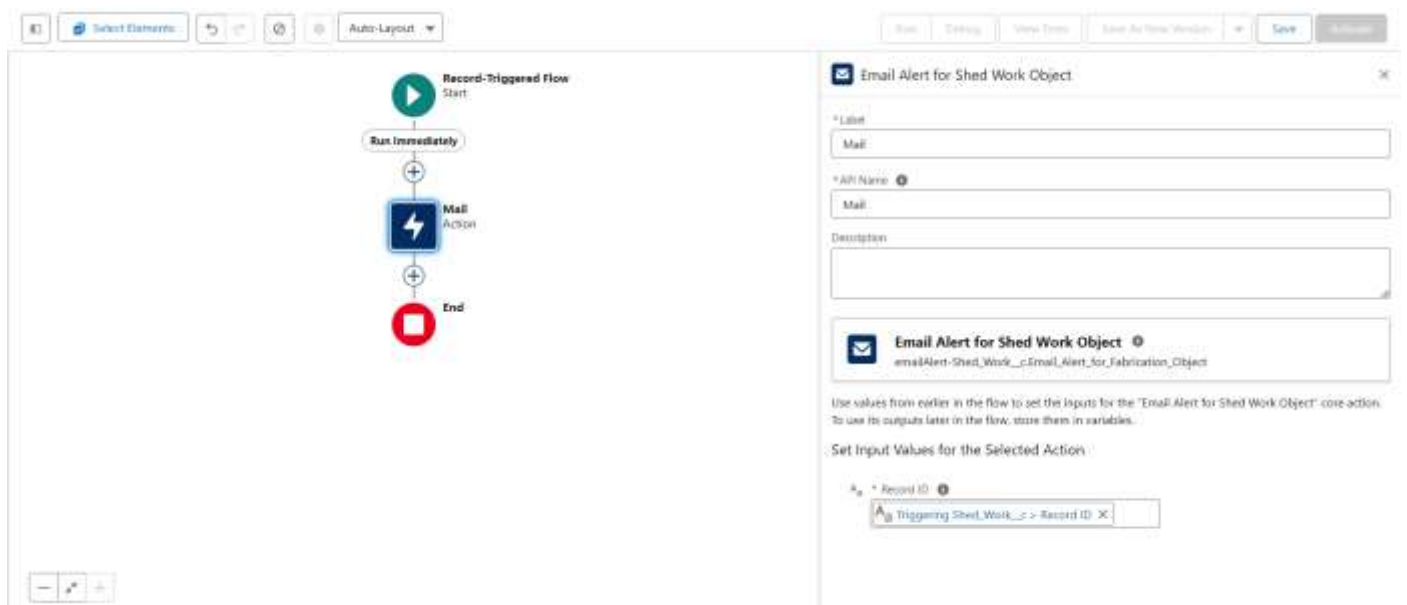
In New Action Select Fabrication Template.

Label : Mail

API Name : Mail

Record ID : {!\$Record.Id}

Click Done.



Under record trigger flow click on “+” icon and select Decision

For New Decision :

Label : Material

Api Name : Material

For Outcome Details :

Label : Iron Material

Outcome API Name : Iron_Material

Condition Requirements to Execute Outcome : Condition Requirements to Execute Outcome

Resource : {!\$Record.Material_Type__c}

Operator : Equals

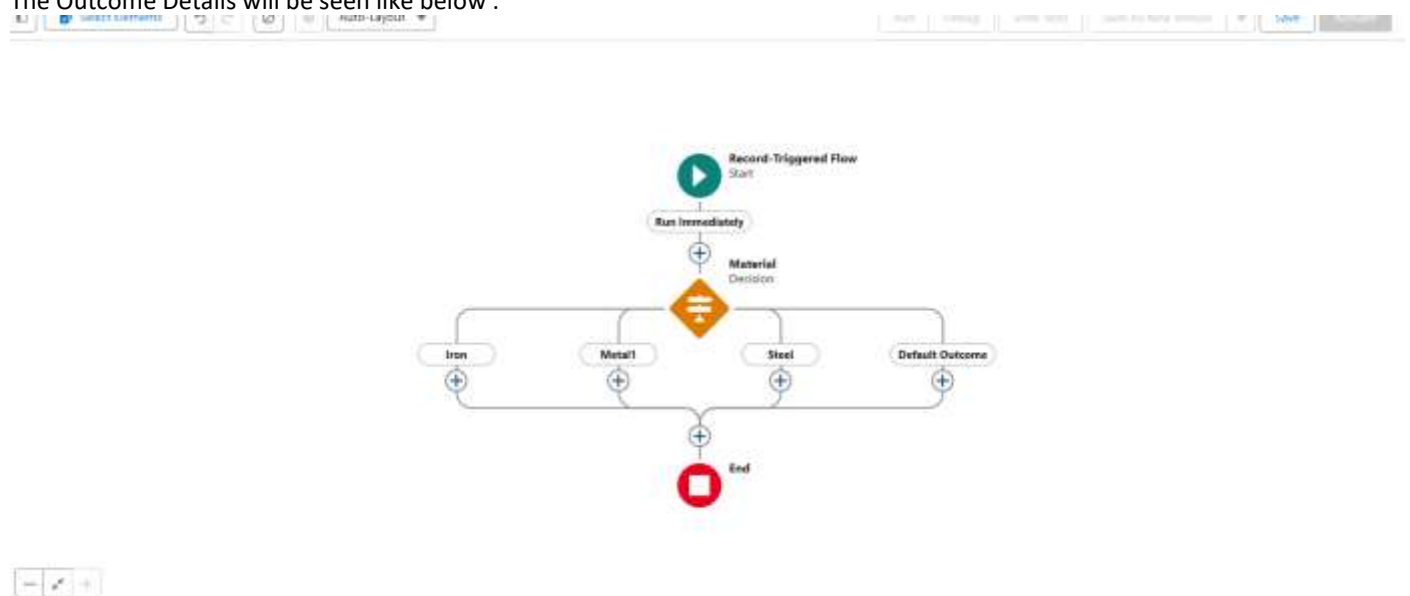
Value : Iron

In the Outcome Order click '+' Icon and create another four outcomes for Metal1, Steel(for each outcome keep the respective value)

For Metal1 >> Value : Metal

For Steel >> Value : Steel

The Outcome Details will be seen like below :



Under Iron Material click on "+" icon and select Update Related Record.

Label : For Iron

API Name : For_Iron

How to Find Records to Update and Set Their Value : Select Use the Shed-Work record that triggered the flow

Set Filter Conditions : None—Always Update Record

Set Field Values for the Fabrication Record

Field : Final_price__c

For Value click on New resource

In Resource Type : Select Formula

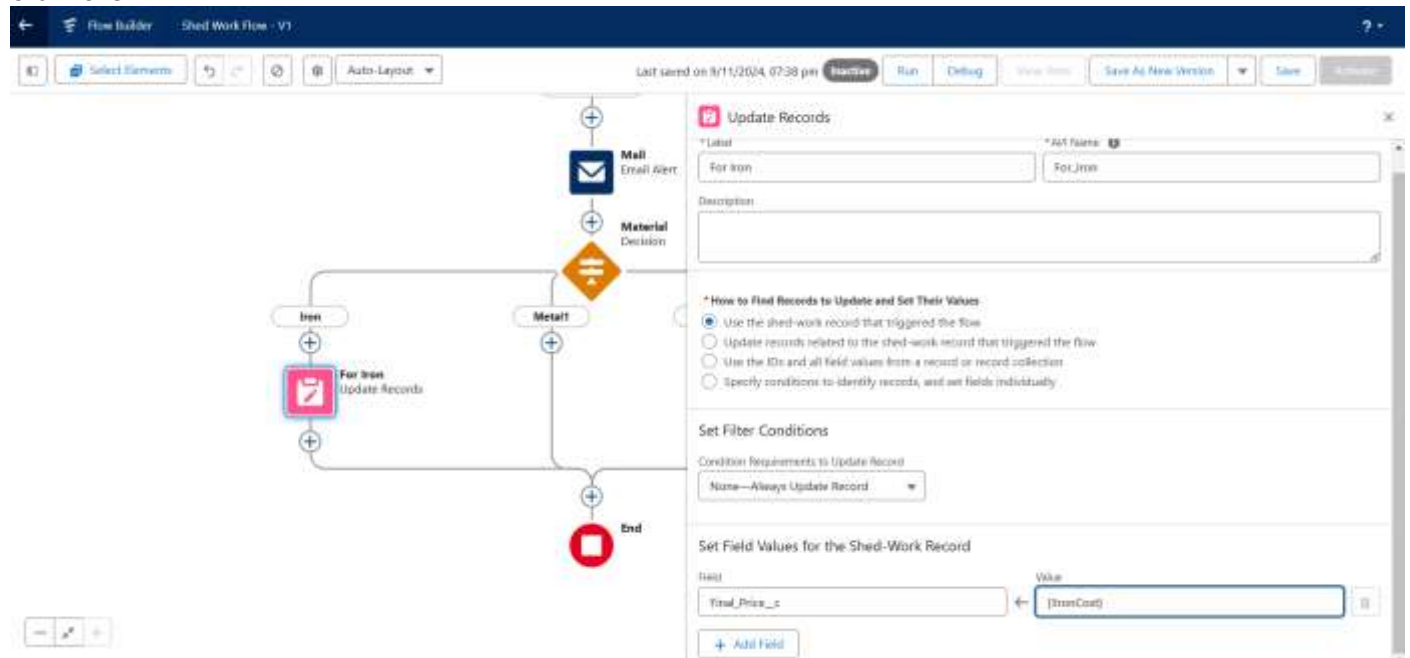
API Name : IronCost

Data Type : Number

Decimal Places : 2

Formula : $\{!\$Record.Amount_c\} * 2$

Click Done



After clicking Done, it would look like

Under Metal1 Material click on “+” icon and select Update Related Record.

Label : For Metal1

API Name : For_Metal1

How to Find Records to Update and Set Their Value : Select Use the fabrication record that triggered the flow

Set Filter Conditions : None—Always Update Record

Set Field Values for the Fabrication Record

Field : Final_price__c

For Value click on New resource

In Resource Type : Select Formula

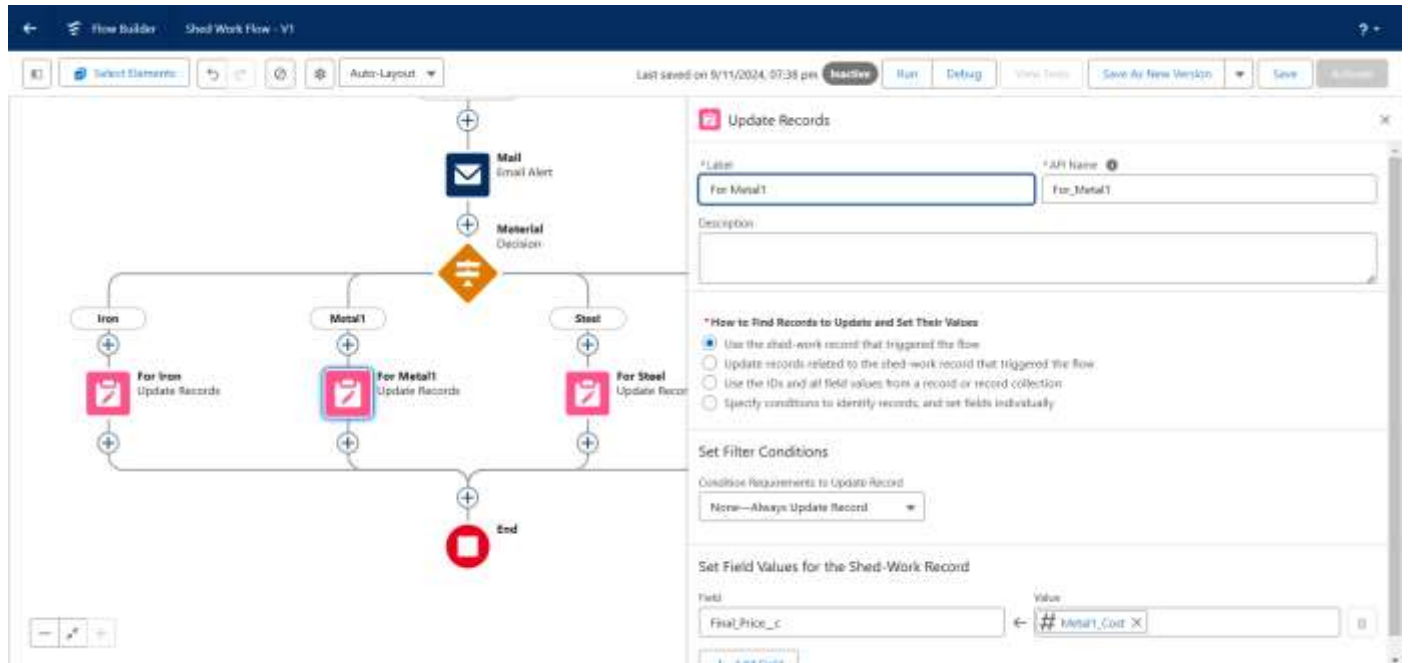
API Name : Metal1_Cost

Data Type : Number

Decimal Places : 2

Formula : $\{!\$Record.Amount_c\} * 1.8$

Click Done



Under Steel Material click on “+” icon and select Update Related Record.

Label : For Steel

API Name : For_Steel

How to Find Records to Update and Set Their Value : Select Use the fabrication record that triggered the flow

Set Filter Conditions : None—Always Update Record

Set Field Values for the Fabrication Record

Field : Final_price__c

For Value click on New resource

In Resource Type : Select Formula

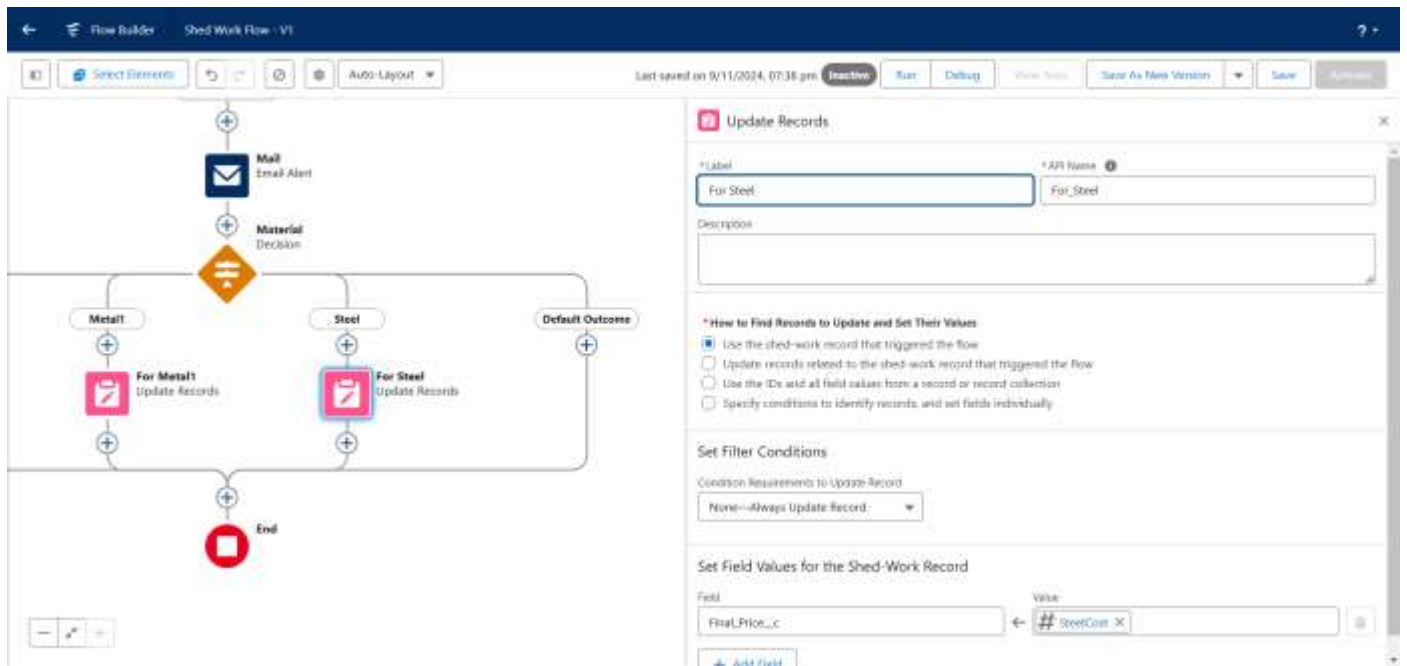
API Name : SteelCost

Data Type : Number

Decimal Places : 2

Formula : $\{!\$Record.Amount_c\} * 1.5$

Click Done



The flow for rods has been completed in shed-work. Now, let's write the flow for sheet of the shed based on material type

Click the '+' icon which is between decision and Email alert then select select Decision

For New Decision :

Label : Sheet Material

Api Name : Sheet_Material

For Outcome Details :

Label : Metal2 Material

Outcome API Name : Metal2_Material

Condition Requirements to Execute Outcome : Condition Requirements to Execute Outcome

Resource : {!\$Record.Material_Type__c}

Operator : Equals

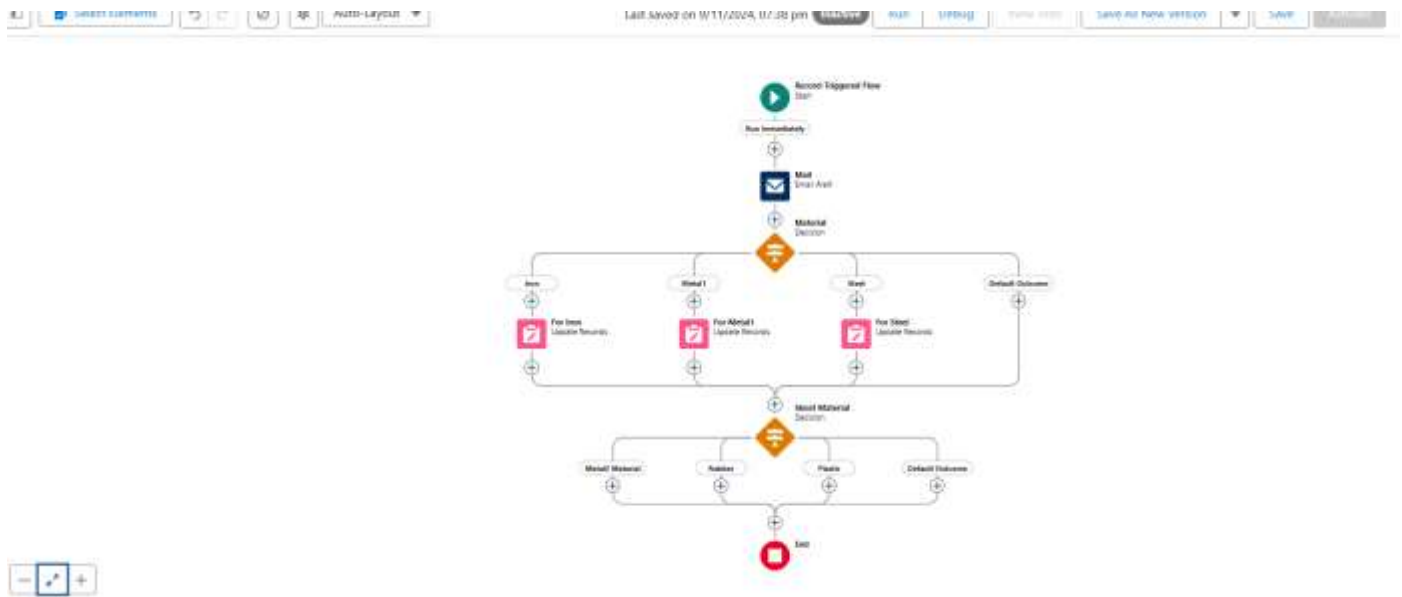
Value : Metals

In the Outcome Order click '+' icon and create another four outcomes for Rubber, Plastic (for each outcome keep the respective value)

For Rubber >> Value : Rubber

For Plastic >> Value : Plastic

The Outcome Details will be seen like below :



Under Iron Material click on “+” icon and select Update Related Record.

Label : For Metal2

API Name : For_Metal2

How to Find Records to Update and Set Their Value : Select Use the Shed Work record that triggered the flow

Set Filter Conditions : None—Always Update Record

Set Field Values for the Fabrication Record

Field : Final_price__c

For Value click on New resource

In Resource Type : Select Formula

API Name : Metal2Cost

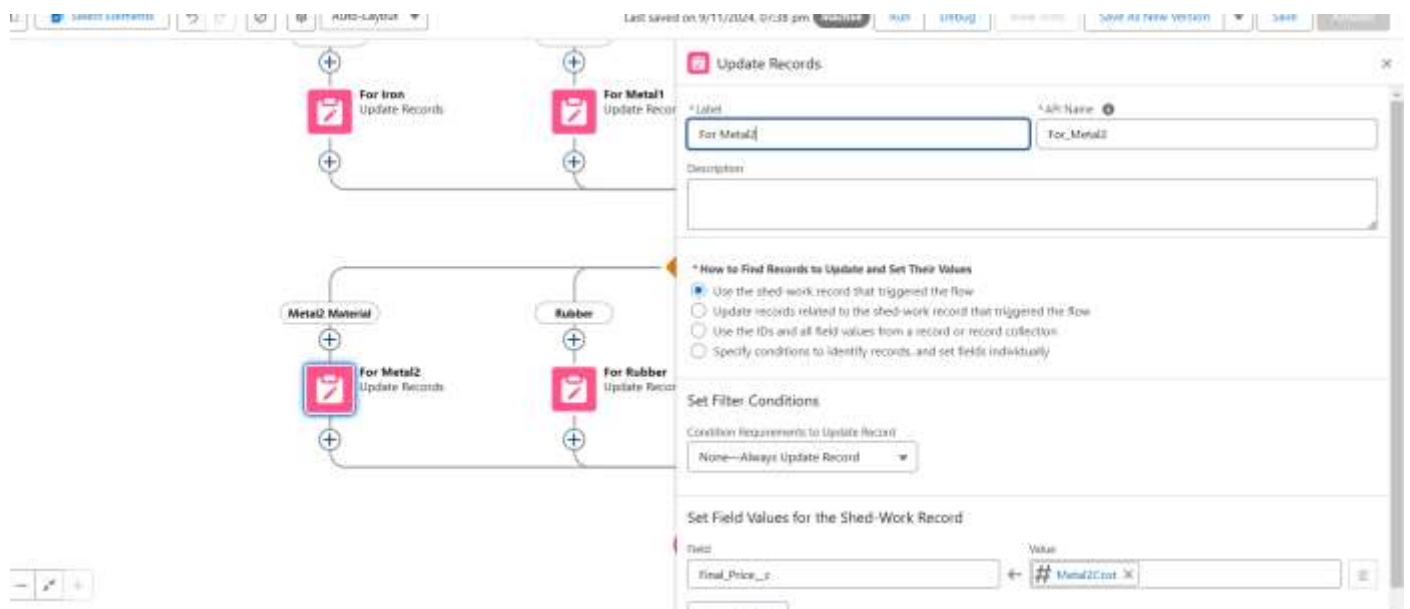
Data Type : Number

Decimal Places : 2

Formula : $\{!\$Record.Amount_c\} * 1.8$

Click Done

Click Done



Under Rubber Material click on “+” icon and select Update Related Record.

Label : For Rubber

API Name : For_Rubber

How to Find Records to Update and Set Their Value : Select Use the Shed Work record that triggered the flow

Set Filter Conditions : None—Always Update Record

Set Field Values for the Fabrication Record

Field : Final_price__c

For Value click on New resource

In Resource Type : Select Formula

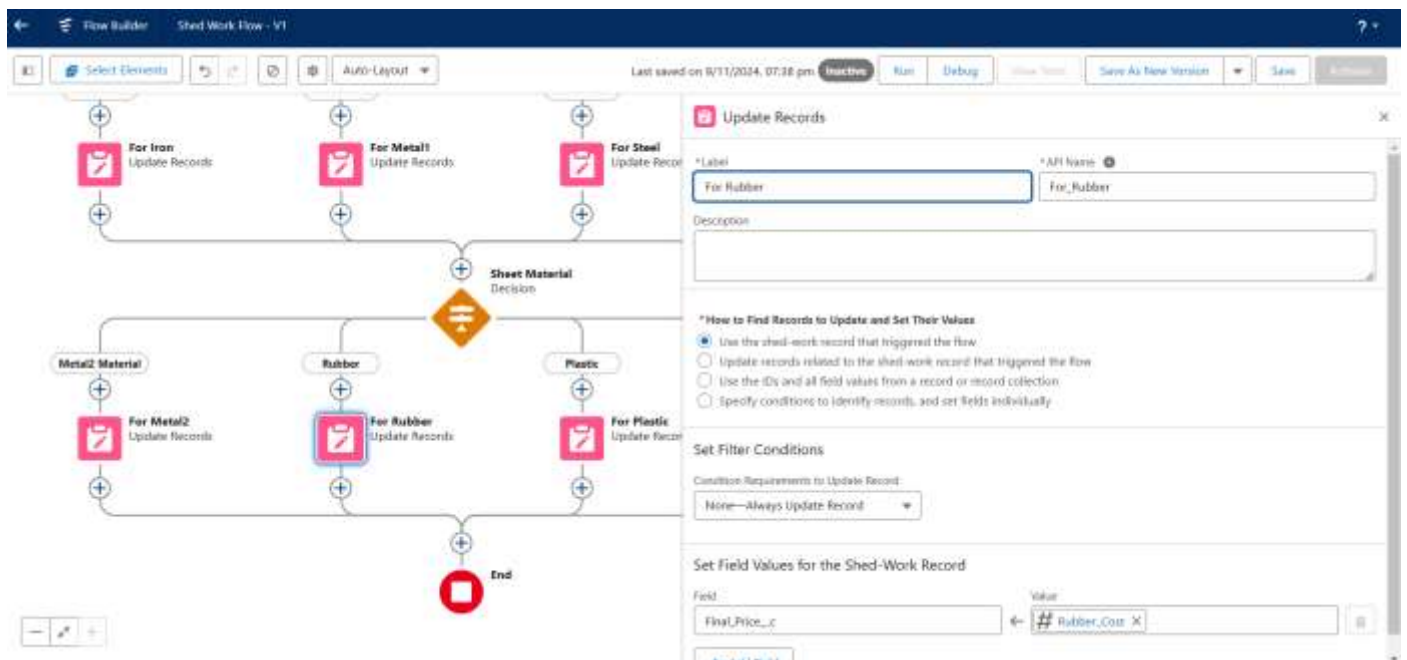
API Name : Rubber_Cost

Data Type : Number

Decimal Places : 2

Formula : $\{!\$Record.Amount_c\} * 1.8$

Click Done



Under Plastic Material click on “+” icon and select Update Related Record.

Label : For Plastic

API Name : For_Plastic

How to Find Records to Update and Set Their Value : Select Use the Shed Work record that triggered the flow

Set Filter Conditions : None—Always Update Record

Set Field Values for the Fabrication Record

Field : Final_price__c

For Value click on New resource

In Resource Type : Select Formula

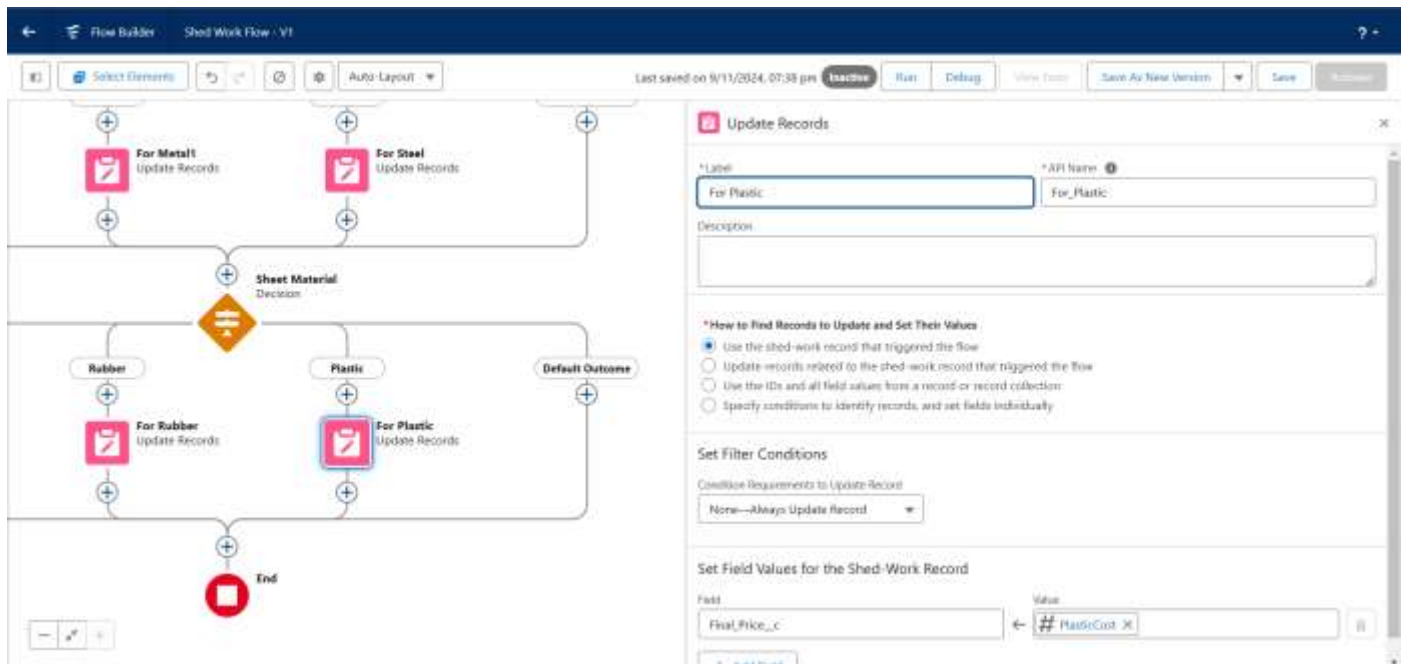
API Name : PlasticCost

Data Type : Number

Decimal Places : 2

Formula : $\{! \$Record.Amount_c\} * 1.5$

Click Done

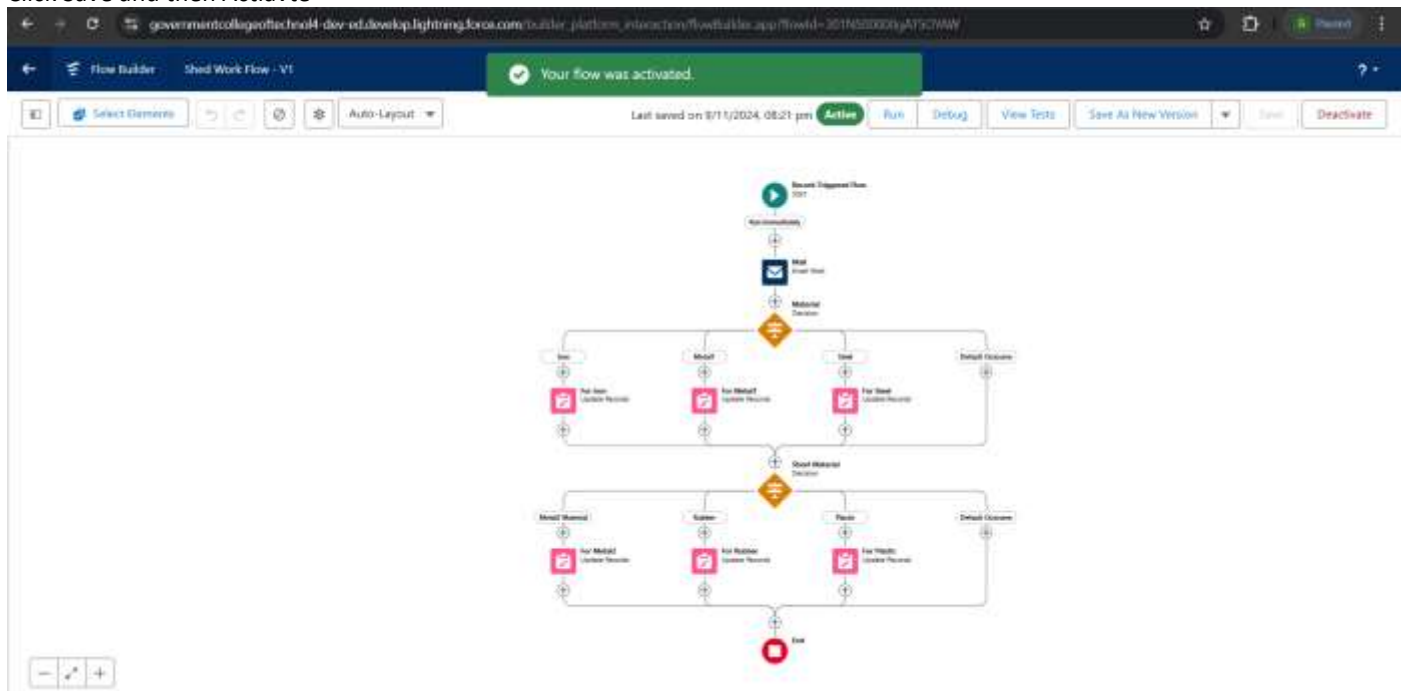


Click on Save

Flow Label : Shed Work Flow

Flow API Name : Shed_Work_Flow

Click Save and then Activate



The Shed Work Flow would look like this:

Create Flow to calculate Final Price on Pipe Lining Object based on Material Type
Go to setup >> type Flow in quick find box >> Click on the Flow and Select the New Flow.

Select the record Triggered flow. Click on create.

Under Object select "Pipe Lining". Click on A record is created or updated.

Set Entry Conditions : None

Select Actions and Related Records

Under record trigger flow click on “+” icon and select Send Email Alert.

In New Action Select Pipe Lining Template.

Label : Mail

API Name : Mail

Record ID : {!\$Record.Id}

Click Done.

Under record trigger flow click on “+” icon and select Decision

For New Decision :

Label : Material

Api Name : Material

For Outcome Details :

Label : Iron Material

Outcome API Name : Iron_Material

Condition Requirements to Execute Outcome : Condition Requirements to Execute Outcome

Resource : {!\$Record.Material_Type__c}

Operator : Equals

Value : Iron

In the Outcome Order click ‘+’ Icon and create another four outcomes for Aluminum, Metal(for each outcome keep the respective value)

For Aluminum >> Value : Aluminum

For Metal >> Value : Metal

The Outcome Details will be seen like below :

Under Iron click on “+” icon and select Update Related Record.

Label : For Iron

API Name : For_Iron

How to Find Records to Update and Set Their Value : Select Use the Pipe Lining record that triggered the flow

Set Filter Conditions : None—Always Update Record

Set Field Values for the Fabrication Record

Field : Final_price__c

For Value click on New resource

In Resource Type : Select Formula

API Name : IronCost

Data Type : Number

Decimal Places : 2

Formula : $\{!\$Record.Amount_c\} * 2$

Click Done

Click Done

Under Aluminum click on “+” icon and select Update Related Record.

Label : For Aluminum

API Name : For_Aluminum

How to Find Records to Update and Set Their Value : Select Use the Pipe Lining record that triggered the flow

Set Filter Conditions : None—Always Update Record

Set Field Values for the Fabrication Record

Field : Final_price__c

For Value click on New resource

In Resource Type : Select Formula

API Name : Aluminum_Cost

Data Type : Number

Decimal Places : 2

Formula : $\{!\$Record.Amount_c\} * 1.8$

Click Done

Under Steel Material click on “+” icon and select Update Related Record.

Label : For Metal

API Name : For_Metal

How to Find Records to Update and Set Their Value : Select Use the Pipe Lining record that triggered the flow

Set Filter Conditions : None—Always Update Record

Set Field Values for the Fabrication Record

Field : Final_price__c

For Value click on New resource

In Resource Type : Select Formula

API Name : MetalCost

Data Type : Number

Decimal Places : 2

Formula : $\{!\$Record.Amount_c\} * 1.5$

Click Done

Click on Save

Flow Label : Pipe Lining Flow

Flow API Name : Pipe_Lining_Flow

Click Save

The Flow will like this :