AUTOMATICALLY POPULATE THE TRAINER FIELDS IN THE "PROGRAM" TABLE BASED ON THE SELECTED TECHNOLOGY AND TRACKER

TEAM MEMBERS

LOBIA A (TEAM LEADER)
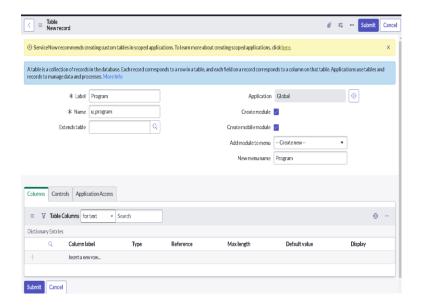
DRAVIDAR SELVI T

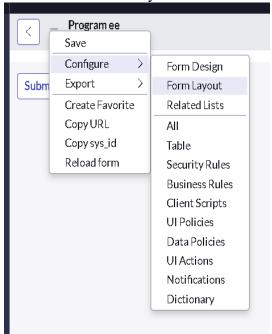**KOUSIKA S**

DHANASRI V

Implementation

Step 1 : Creating Custom Table
1. Open "Tables" >> New.
2. Give the label name as " program ".
3. Click on Submit.

4. Click on new to open record, click on the Additional Actions and go to configure >> select Form Layout.

Create fields as
a.   Name : Technology
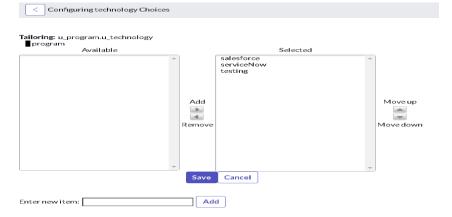b.   Type : choice

     Click on Add

And follow the same instructions
For two more fields are

a.   Tracker
b.   Trainer
1.   Add them and click on save.

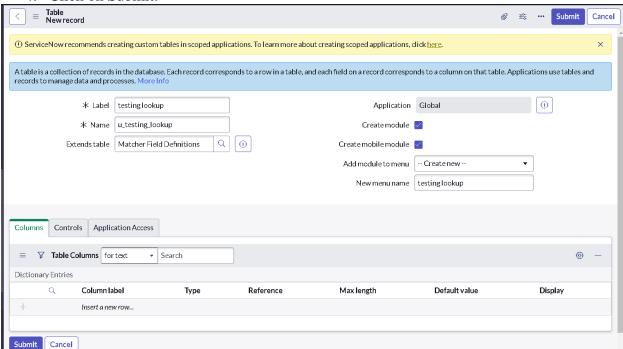Now right click on " technology " field click on Configure Choices.
10.   Enter the item as " Salesforce " and click on Add.
11.   Add two more items
a.   ServiceNow
b.   Testing
12.   Click on save.

14.   Follow the same steps from 9 to 13 for remaining two fields.
15.   Tracker values are:
a.   Admin
b.   Developer
16.   Trainer values are:
.   Rakesh
a.   Tarakesh
b.   Ajay
c.   Phani
d.   Shivam
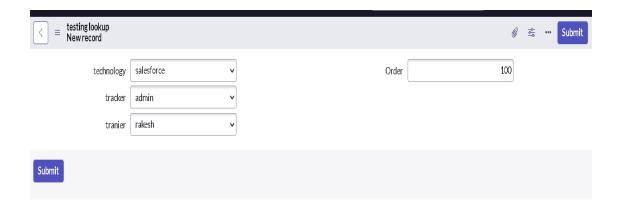17.   Click on save.

Step 2 : Creating a custom matcher table.

1. Open "Tables" >> New.
2. Give the label name as " testing lookup ".
3. Add " Matcher Field Definition " in the Extends table field.
4. Click on Submit.

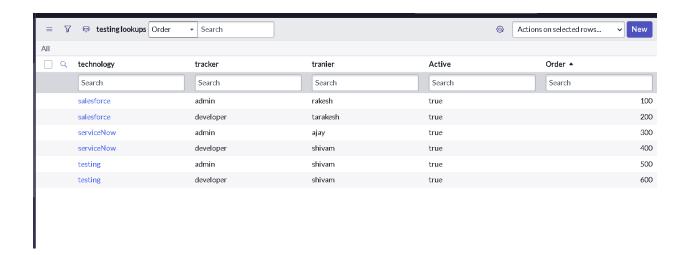5.   Follow the same steps from 4 to 17 from " step - 1 ".
6.   And add another field from the Form Layout that is " order ".
7.   Click on save.

Step 3 : Create records in matcher table

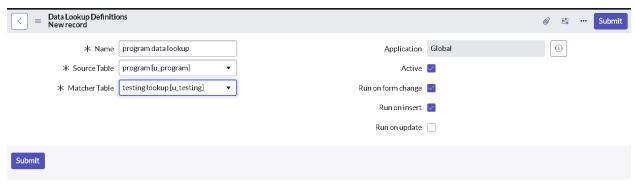1. Follow the below figure to create a record.

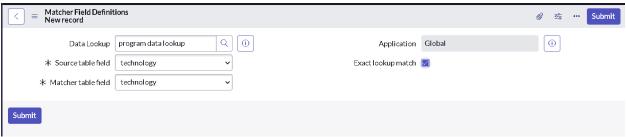2. Follow the figure to create more records as shown in below figure.

Step 4 : Create Data Lookup Definition to automate the trainer
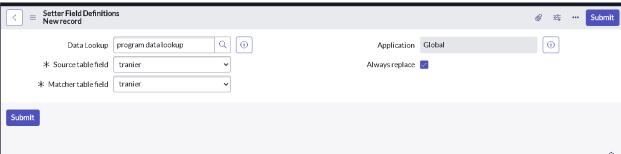
1. Search for Data Lookup Definition in All navigation.
2. Click on new.
3. Give name as " program data lookup "
4. Select the source table as " program ".
5. Select the matcher table as " testing lookup ".
6. Click on submit.

Data Lookup Definitions					
New record					Submit

* Name: program data lookup
* Source Table: program [u_program] ▼
* Matcher Table: testing lookup [u_testing] ▼

Application: Global
Active: ☑
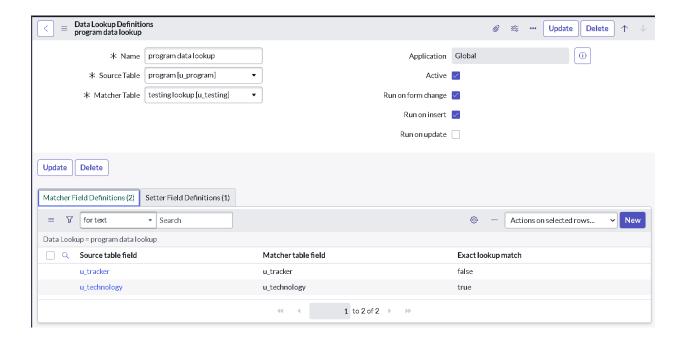Run on form change: ☑
Run on insert: ☑
Run on update: ☐

Submit

7. Again open the " program data lookup " record.
8. Scroll down under matcher field definitions and click on new.
9. Select the source table field : technology
10. And select the matcher table field : technology
11. Exact lookup match : checked.
12. Click on Submit.

Matcher Field Definitions			
New record			Submit

Data Lookup: program data lookup 🔍 ⓘ
* Source table field: technology ▼
* Matcher table field: technology ▼

Application: Global
Exact lookup match: ☑

Submit

13. And create another Matcher field definitions for another field : tracker
14. Click on Setter field definition and click on new
15. Select the source table field : trainer
16. And select the matcher table field : trainer
17. Always replace the field : checked.
18. Click on Submit.

Setter Field Definitions			
New record			Submit

Data Lookup: program data lookup 🔍 ⓘ
* Source table field: tranier ▼
* Matcher table field: tranier ▼

Application: Global
Always replace: ☑

Submit

19. Click on update.

Result

1. Go to the source table " program ".
2. Click on new .
3. Select any technology and tracker .
4. To check the trainer is automatically assigned to it.