

Fields

When we talk about Salesforce, Fields represent the data stored in the columns of a relational database. It can also hold any valuable information that you require for a specific object. Hence, the overall searching, deletion, and editing of the records become simpler and quicker.

Types of Fields

1. Standard Fields
2. Custom Fields

Standard Fields:

As the name suggests, the Standard Fields are the predefined fields in Salesforce that perform a standard task. The main point is that you can't simply delete a Standard Field until it is a non-required standard field. Otherwise, users have the option to delete them at any point from the application freely. Moreover, we have some fields that you will find common in every Salesforce application. They are,

- Created By
- Owner
- Last Modified
- Field Made During object Creation

Custom Fields:

On the other side of the coin, Custom Fields are highly flexible, and users can change them according to requirements. Moreover, each organiser or company can use them if necessary. It means you need not always include them in the records, unlike Standard fields. Hence, the final decision depends on the user, and he can add/remove Custom Fields of any given form.

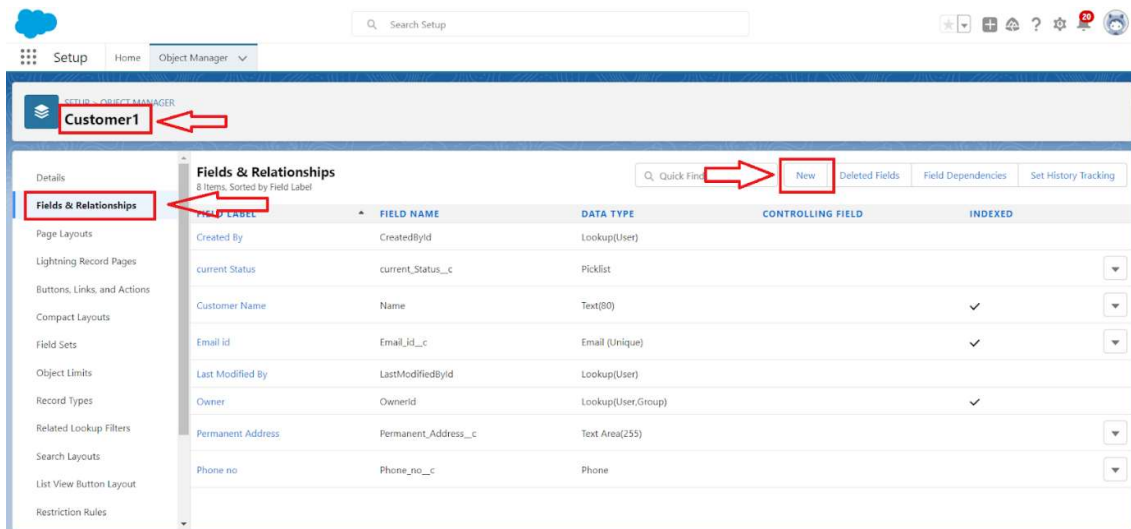
Creation of fields for the Customer Details object

1. To create fields in an object:

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

<div>  Object Manager </div> <div> <input type="text" value="cus"/> <input type="button" value="Schema Builder"/> <input type="button" value="Create"/> </div>					
2 Items, Sorted by Label					
LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Customer	Customer	Standard Object			
Customer Details	Customer_Details__c	Custom Object		05/10/2023	✓

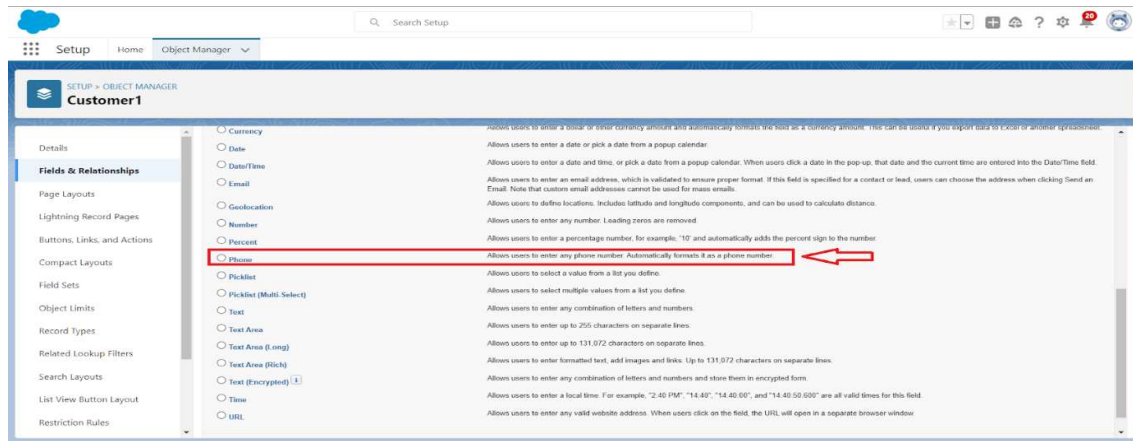
2. Now click on “Fields & Relationships” >> New



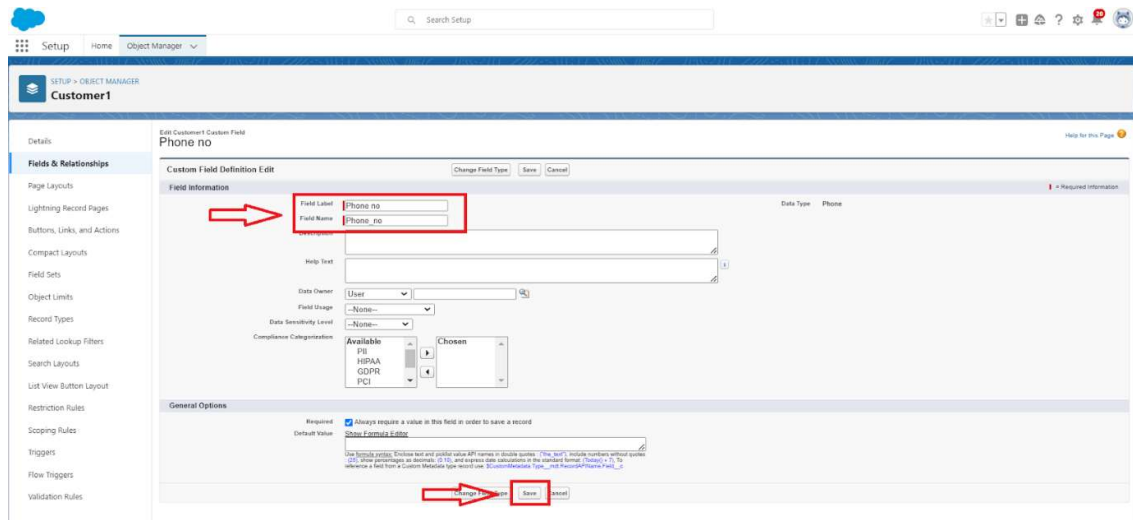
The screenshot shows the Salesforce Object Manager interface. The 'Customer1' object is selected. The 'Fields & Relationships' section is active, showing a list of fields. The 'New' button is highlighted with a red arrow.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
current Status	current_Status__c	Picklist		
Customer Name	Name	Text(80)		✓
Email Id	Email_Id__c	Email (Unique)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Permanent Address	Permanent_Address__c	Text Area(255)		
Phone no	Phone_no__c	Phone		

3. Select Data Type as a “Phone”



4. Click on next.



5. Fill the Above as following:

- Field Label: Phone number
- Field Name : gets auto generated
- Click on Next >> Next >> Save and new.

Note: Follow the above steps for the remaining field for the same object.

2. To create another fields in an object:

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

2. Now click on "Fields & Relationships" >> New
3. Select Data type as a "Email" and Click on Next
4. Fill the Above as following:
 - Field Label : Gmail
 - Field Name : gets auto generated
 - Click on Next >> Next >> Save and new.

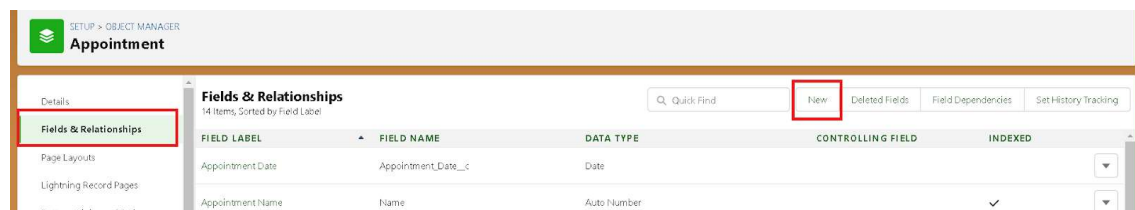
Creation of Lookup Fields

Creation of Lookup Field on Appointment Object :

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



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



3. Select “Look-up relationship” as data type and click Next.

The screenshot shows a dialog box titled 'Specify the type of information that the custom field will contain.' It has a 'Next' button and a 'Cancel' button. Below the title is a section for 'Data Type' with several options. The 'Look-up Relationship' option is selected and highlighted with a red circle. A red arrow points to the 'Next' button.

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

Data Type

Select one of the data types below.

- ☐ None Selected
- ☐ Auto Number
- ☐ Formula
- ☐ Roll-Up Summary
- ☒ Look-up Relationship
- ☐ Master-Detail 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.

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.

4. Select the related object “ Customer Details” and click next.
5. Next >> Next >> Save.

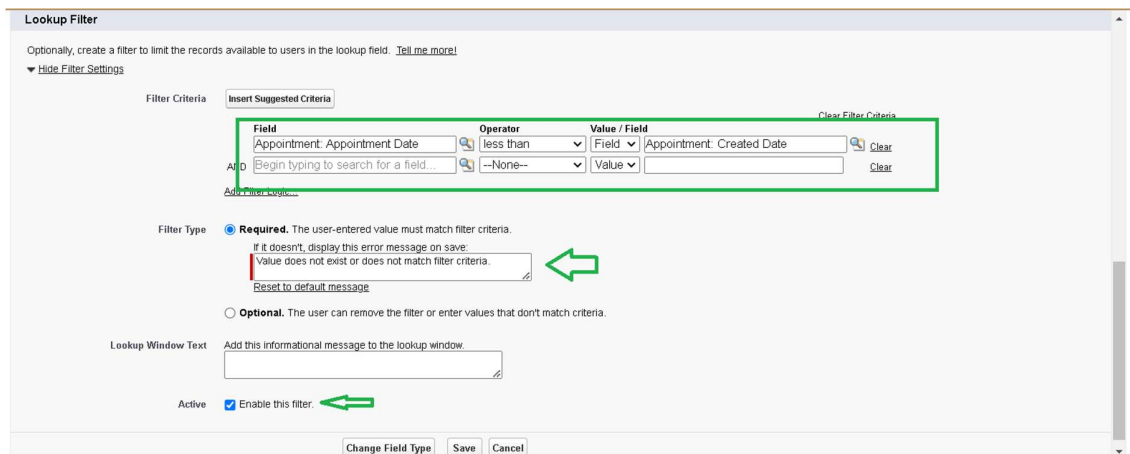
Note: Make sure you complete Activity 4 Before continuing.

Creation of Lookup Field on Service records Object :

1. Go to setup >> click on Object Manager >> type object name(Service records) in search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select “Look-up relationship” as data type and click Next.
4. Select the related object “ Appointment ” and click next.
5. Make it a required field so click on Required.



6. Scroll down for Lookup Filter and click on Show filter settings.
7. Now add the filter criteria.
8. Field : Appointment: Appointment Date >> Operator : less than >> select field >> Appointment: Created Date
9. Filter type should be Required.



10. Error Message : Value does not match the criteria.
11. Enable the filter by click on Active.
12. Next >> Next >> Save.

Creation of Lookup Field on Billing details and feedback Object :

1. Go to setup >> click on Object Manager >> type object name(Billing details and feedback) in search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New.
3. Select “Look-up relationship” as data type and click Next.
4. Select the related object “ Service records” and click next.
5. Next >> Next >> Save & new.

Creation of Checkbox Fields

Creation of Checkbox Field on Appointment Object :

1. Go to setup >> click on Object Manager >> type object name(Appointment) in search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New.
3. Select “Check box” as data type and click Next.

The screenshot shows the Salesforce Setup interface for the 'Appointment' object. 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', and 'Restriction Rules'. The 'Fields & Relationships' section is currently active. The main content area shows the 'Data Type' dropdown menu, which is open, displaying options: 'None Selected', 'Auto Number', 'Formula', 'Roll-Up Summary', 'Lookup Relationship', 'Master Detail Relationship', 'External Lookup Relationship', 'Checkbox', and 'Currency'. The 'Checkbox' option is selected and highlighted with a red box. The 'Next' button is visible in the top right corner of the main content area.

4. Give the Field Label : Maintenance service
5. Field Name : is auto populated
6. Default value : unchecked

Step 2. Enter the details

Step 2 of 4

Field Label: Maintenance service

Default Value: ☐ Checked ☒ Unchecked

Field Name: Maintenance_service

Description:

Help Text:

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

Previous Next Cancel

7. Click on next >> next >> save.

Creation of Another Checkbox Field on Appointment Object :

1. Repeat the steps from 1 to 3.
2. Give the Field Label : Repairs
3. Field Name : is auto populated
4. Default value : unchecked
5. Click on next >> next >> save.
6. Follow the same and create another checkbox with given names
7. Give the Field Label : Replacement Parts
8. Field Name : is auto populated
9. Default value : unchecked
10. Click on next >> next >> save.

Creation of Checkbox Field on Service records Object :

1. Go to setup >> click on Object Manager >> type object name(Service records) in search bar >> click on the object.
2. Now click on "Fields & Relationships" >> New.
3. Select "Check box" as data type and click Next.
4. Give the Field Label : Quality Check Status
5. Field Name : is auto populated
6. Default value : unchecked
7. Click on next >> next >> save

Creation of date Fields

Creation of Date Field on Appointment Object :

1. Go to setup >> click on Object Manager >> type object name(Appointment) in the search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New.
3. Select “Date” as data type and click Next.
4. Give the Field Label : Appointment Date
5. Field Nme : is auto populated
6. Make it as a Required field by click on the Required option.
7. Click on next >> next >> save.

Appointment
New Custom Field

Step 2. Enter the details

Field Label: Appointment Date

Field Name: Appointment_Date

Description:

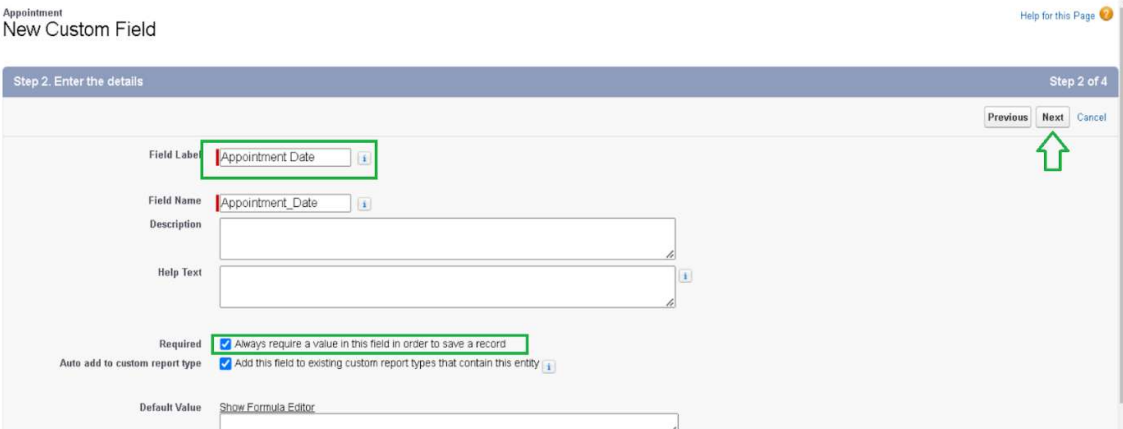
Help Text:

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

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

Default Value: Show Formula Editor

Previous Next Cancel



Creation of Currency Fields

Creation of Currency Field on Appointment Object :

1. Go to setup >> click on Object Manager >> type object name(Appointment) in the search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New.
3. Select “Currency” as data type and click Next.
4. Give the Field Label : Service Amount
5. Field Nme : is auto populated

Step 2. Enter the details Step 2 of 4

Previous Next Cancel

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

Auto add to custom report type ☒ Add this field to existing custom report types that contain this entity ⓘ

6. Click on next
7. Give read only for all the profiles in field level security for profile.

Appointment
New Custom Field Help for this Page ⓘ

Step 3. Establish field-level security Step 3 of 4

Previous Next Cancel

Field Label Service Amounts

Data Type Currency

Field Name Service_Amounts

Description

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

Field Level Security for Profile	<input checked="" type="checkbox"/> Visible	<input checked="" type="checkbox"/> Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Authenticated Website	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Authenticated Website	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

8. Click on next >> save.

Creation of Currency Field on Billing details and feedback Object :

1. Follow the same steps as mentioned above in Billing details and feedback Object.
2. Change the label name as mentioned.
3. Give the Field Label : Payment Paid
4. Field Nme : is auto populated

Creation of Text Fields

1. Go to setup >> click on Object Manager >> type object name(Appointment) in the search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New.
3. Select “Text” as data type and click Next.
4. Give the Field Label : Vehicle number plate
5. Field Name : is auto populated
6. Length : 10
7. Make field as Required and Unique.

Step 2. Enter the details Step 2 of 4

Field Label

Please enter the maximum length for a text field below.

Length

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

☒ 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

8. Click on next >> next >> save.

Creation of Text Fields in Billing details and feedback object :

1. Go to setup >> click on Object Manager >> type object name(Billing details and feedback) in search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New.
3. Select “text” as data type and click Next.
4. Give the Field Label : Rating for service
5. Field Name : is auto populated
6. Length : 1
7. Make field as Required.
8. Click on next >> next >> save

Creation of Picklist Fields

Creation of Picklist Fields in Service records object :

1. Go to setup >> click on Object Manager >> type object name(Service

- records) in search bar >> click on the object.
2. Click on fields & relationship >> click on New.
 3. Select Data type as "Picklist" and click Next.
 4. Enter Field Label as "Service Status", under values select "Enter values, with each value separated by a new line" and enter values as shown below.
 5. The values are: Started, Completed.

New Custom Field

Step 2. Enter the details Step 2 of 4

Previous Next Cancel

Field Label

Values

☐ 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

6. Click Next.
7. Next >> Next >> Save.

Creation of Picklist Fields in Billing details and feedback object :

1. Go to setup >> click on Object Manager >> type object name(Billing details and feedback) in search bar >> click on the object.
2. Click on fields & relationship >> click on New.
3. Select Data type as "Picklist" and click Next.
4. Enter Field Label as "Payment Status", under values select "Enter values, with each value separated by a new line" and enter values as shown below.

5. The values are: Pending, Completed.
6. Click Next.
7. Next >> Next >> Save.

Creating Formula Field in Service records Object

1. Go to setup >> click on Object Manager >> type object name(Service records) in search bar >> click on the object.
2. Click on fields & relationship >> click on New.
3. Select Data type as “Formula” and click Next.
4. Give Field Label and Field Name as “service date” and select formula return type as “Date” and click next.

Step 2. Choose output type

Field Label:

Field Name:

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

Formula Return Type

☐ None Selected

☐ Checkbox

☐ Currency

☒ Date

☐ Date/Time

Select one of the data types below

Calculate a boolean value
Example: `{TODAY() > CloseDate}`

Calculate a dollar or other currency amount and automatically format the field as a currency amount.
Example: `{Gross Margin = Amount - Cost_c}`

Calculate a date, for example, by adding or subtracting days to other dates.
Example: `{Reminder Date = CloseDate - 7}`

Calculate a datetime, for example, by adding a number of hours or days to another datetime.
Example: `{Next = NOW() + 1}`

Previous Next Cancel

5. Insert field formula should be : CreatedDate

Insert Field

Select a field, then click Insert. Labels followed by a ">" indicate that there are more fields available.

Service records >

\$Api >

\$Label >

\$Organization >

\$Profile >

\$System >

\$User >

\$UserRole >

Appointment

Appointment >

Created By >

Created By ID

Created Date

Last Activity Date

Last Modified By >

Last Modified By ID

Last Modified Date

You have selected:

CreatedDate

Type: Date/Time

API Name: CreatedDate

Insert

Close

Step 3. Enter formula Step 3 of 5

[Previous](#) [Next](#) [Cancel](#)

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

Example: `Reminder Date = CloseDate - 7` [More Examples...](#)

[Simple Formula](#) [Advanced Formula](#)

[Insert Field](#) [Insert Operator](#)

service dates (Date) = CreatedDate

Functions
-- All Function Categories --
ABS
ACOS
ADDMONTHS
AND
ASCII

Quick Tips

- [Getting Started](#)
- [Operators & Functions](#)

6. click "Check Syntax".
7. Click next >> next >> Save.