

Phase -3

Salesforce Custom Objects, Fields, Layouts, and Testing

1. Custom Objects Creation

- Go to Setup → Object Manager → Create → Custom Object.
- Create Event object:
- Label: Event
- Plural Label: Events
- Record Name: Event Name (Text)
- Optional: enable Reports, Activities, Track Field History, etc.
- Repeat for Attendee and Feedback objects:
- Attendee: Label Attendee, Plural Attendees, Record Name Attendee Name (Text)
- Feedback: Label Feedback, Plural Feedbacks, Record Name Feedback Name (Auto Number or Text)

2. Add Fields & Relationships

Event Object Fields

- Event Name → Text (already created as Record Name)
- Event Date → Date
- Venue → Text
- Description → Long Text Area
- Total Attendees → Roll-Up Summary (optional, COUNT of Attendees)

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Attendee number	Attendee_number__c	Number(18, 0)		
Created By	CreatedById	Lookup(User)		
Description	Description__c	Long Text Area(32768)		
Event name	Event__c	Text(20)		
Event Name	Name	Text(80)		✓
Event Date	Event_Date__c	Date		
Event picklist	Event_picklist__c	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Record Type	RecordTypeId	Record Type		✓

Attendee Object Fields

- Attendee Name → Text (Record Name)
- Email → Email
- Phone → Phone
- Event → Master-Detail Relationship to Event

Setup

Home

Object Manager

SETUP > OBJECT MANAGER

Attendee

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Object Access

Fields & Relationships

9 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
Attendee Name	Attendee_Name__c	Text(50)		
Attendee Name	Name	Text(80)		✓
Check-In Status	Check_In_Status__c	Picklist		
Created By	CreatedById	Lookup(User)		
Email	Email__c	Email (External ID)		✓
Event	Event__c	Master-Detail(Event)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Phone	Phone__c	Phone		
Ticket Type	Ticket_Type__c	Picklist		

Feedback Object Fields

- Feedback Name → Auto Number (Record Name)
- Rating → Number or Picklist
- Comments → Long Text Area
- Attendee → Lookup to Attendee
- Event → Lookup to Event

Event

Lookup to Event

SETUP > OBJECT MANAGER

Feedback

Details

Fields & Relationships

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Scoping Rules

Object Access

Triggers

FIELD LABEL

FIELD NAME

DATA TYPE

CONTROLLING FIELD

INDEXED

Attendee

Attendee__c

Lookup(Attendee)

✓

Comments

Comments__c

Long Text Area(32768)

Created By

CreatedById

Lookup(User)

Event

Event__c

Lookup(Event)

✓

Feedback Name

Name

Text(80)

✓

Feedback Title

Feedback_Title__c

Text(50)

Last Modified By

LastModifiedById

Lookup(User)

Owner

OwnerId

Lookup(User,Group)

✓

Rating

Rating__c

Number(18, 0)

3. Page Layouts

Event Layout

- Fields: Event Name, Event Date, Venue, Description, Total Attendees
- Related Lists: Attendees, Feedback

Attendee Layout

- Fields: Attendee Name, Email, Phone, Event
- Related List: Feedback

Feedback Layout

- Fields: Feedback Name, Rating, Comments, Event, Attendee

4. Compact Layouts

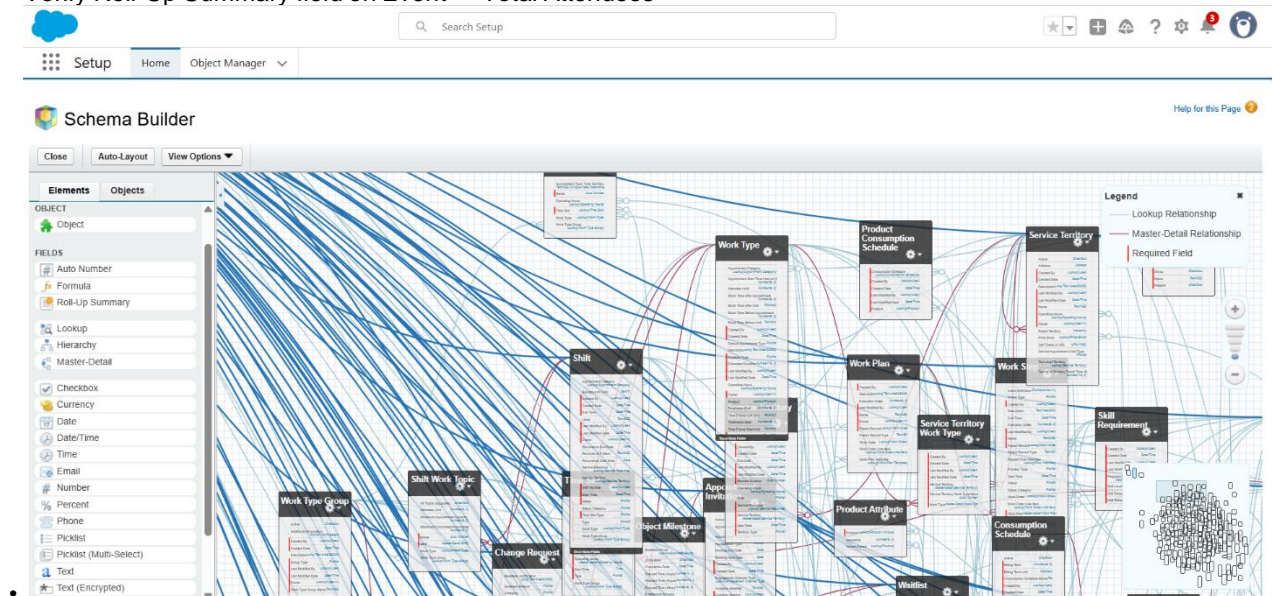
- Event: Event Name, Event Date, Venue
- Attendee: Attendee Name, Email, Event
- Feedback: Feedback Name, Rating, Attendee, Event
- Set each as Primary Compact Layout

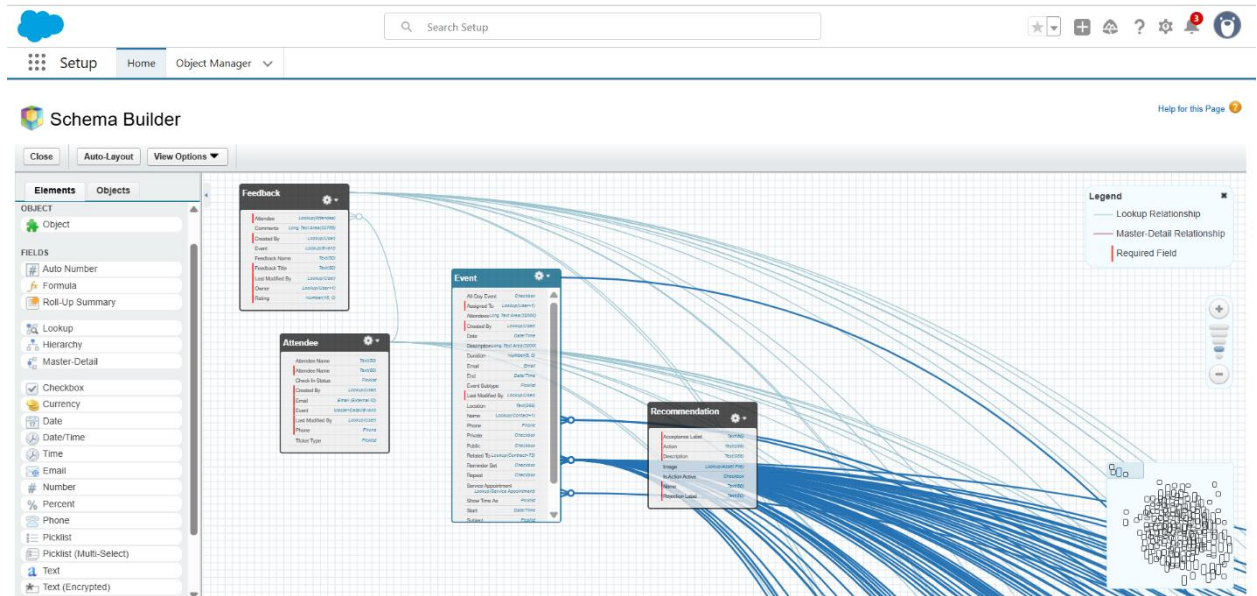
5. Record Types (Optional)

- Create Public Event Record Type for Event object
- Clone from Master layout
- Enable for required profiles
- Assign appropriate Page Layout

6. Schema Builder

- Go to Setup → Schema Builder
- Select Event, Attendee, Feedback objects
- Check relationships:
- Attendee → Event (Master-Detail)
- Feedback → Event / Attendee (Lookup)
- Verify Roll-Up Summary field on Event → Total Attendees






7. Testing & Verification

- App Launcher → Event tab → New Event record → Fill details → Save
- Attendee tab → New Attendee → Select Event → Save
- Feedback tab → New Feedback → Select Attendee + Event → Save
- Verify Page Layouts and Related Lists

The screenshot shows the 'Feedback' record details page in the Developer Edition. The page layout includes a header with the 'Feedback' object name and a 'Rajveer' user profile. Below the header, there are tabs for 'Related' and 'Details'. The 'Details' tab is active, showing the following fields:

- Feedback Name:** Rajveer
- Feedback Title:** Wedding feedback
- Event:** [Wedding](#)
- Attendee:** [Rajveer](#)
- Rating:** 9
- Comments:**
- Created By:** [Vibhuti Shivhare](#), 9/23/2025, 1:51 AM
- Last Modified By:** [Vibhuti Shivhare](#), 9/23/2025, 1:51 AM

The page also includes a sidebar with navigation links: 'New Contact', 'Edit', and 'New Opportunity'.



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Q

Search...

Developer Edition

Welcome

Attendee

Rajveer

New Contact

Edit

New Opportunity

▼

Related

Details

Attendee Name

Rajveer

Attendee Name

Rajveer

Email

rajveer@gamil.com

Event

Wedding

Phone

(900) 002-0068

Ticket Type

Other

Check-In Status

Other

Created By


Vibhuti Shivhare

9/23/2025, 1:49 AM

Last Modified By

Vibhuti Shivhare

9/23/2025, 1:49 AM



Q

Search...

Developer Edition

Welcome

Event

Wedding

Related

Details

Event Name

Wedding

Event name

Wedding

Event Date

9/22/2025

Event picklist

Other

Attendee number

150

Venue

XYZ

Description ⓘ

Owner

Vibhuti Shivhare

*Total Attendees

0

Created By

Vibhuti Shivhare

9/23/2025, 1:46 AM

Last Modified By

Vibhuti Shivhare

9/23/2025, 1:46 AM