Salesforce Certified Admin and App Builder

Lesson 3—Field Types

- Various field types

- Creating formula fields

- Best practices for roll-up summary fields

- Using encrypted fields

- Different text fields

Modifying Standard Fields

Modifying Standard Fields

Remember the following points when
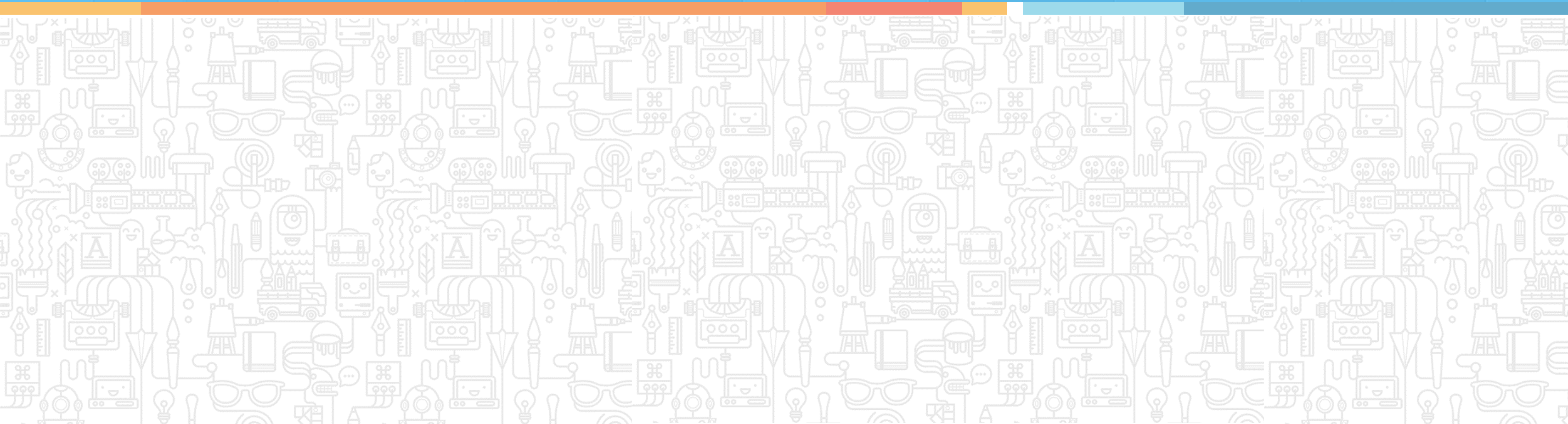
modifying standard fields:

- Standard fields are default and come out

  of the box with Salesforce.

- You cannot modify all standard fields.

- You can rename standard field labels.

- You can configure drop-down menus.

Field Definition Edit   Save   Cancel

Field Information

| Field Label | Account Owner |
| Field Name | Owner |

Creating Auto-Number Fields

Keep in mind the following points about auto-number fields:

- These fields are perfect for automatically assigning a number to records.

- Account number or Customer number is the most common use case.

- These fields can be used as a unique identifier for integrating with outside systems.

Field Label	Account Number
Display Format	A-{000} Example: A-{0000}
Starting Number	101
	☐ Generate Auto Number for existing records
Field Name	Account_Number

Creating Formula Fields

Creating Formula Fields

Remember the following about formula fields:

- Formula fields are calculated whenever the page and record load.

- Formula fields can perform basic operations, including add, subtract, multiply, and divide.

- Formula field values cannot be edited, they can only be calculated.

- Formula fields can be used to bring information from related records using cross-object formulas.

Example: Reminder Date = CloseDate - 7   More Examples …

Simple Formula | **Advanced Formula**

Insert Field   Insert Operator ▼

Sample Formula (Date) =

AccountNumber + AnnualRevenue

Check Syntax

Creating Roll-Up Summary Fields

Keep the following points in mind when creating roll-up summary fields:

- They allow you to summarize numeric values from child records.

- They are useful for counting number of child records, dollar amounts, or percentages for sales summaries.

- They are not compatible with any other field type.

- Roll-up summary fields must be the master in a master-detail relationship.

Roll-Up Summary Options

|	
Data Type	Roll-Up Summary
Summarized Object	Opportunity
Filter Criteria	(Won EQUALS False) AND (Stage EQUALS Closed Lost)

Creating Lookup and Master Detail Fields

Keep in mind the following points:

- Master-Detail fields create a required relationship between parent and child records.

- Master-Detail fields allow the creation of roll-up summary fields on records.

- Lookup fields allow a basic relationship association.

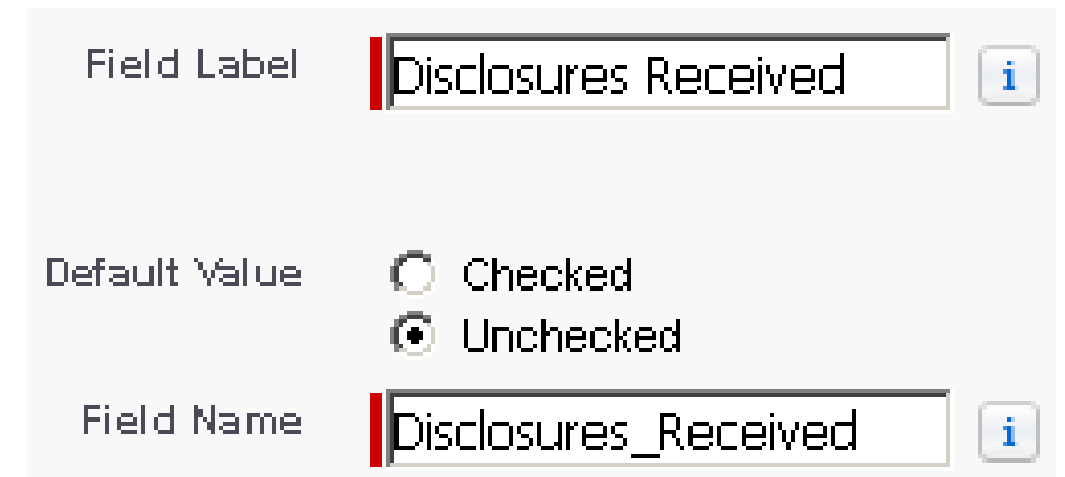- Cross-object formulas can take advantage of lookup fields.

Master-Detail Options

Related To	Project	Child Relationship Name	Project_Tasks
Related List Label	Project Tasks		
Sharing Setting	Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.		

Creating Checkbox Fields
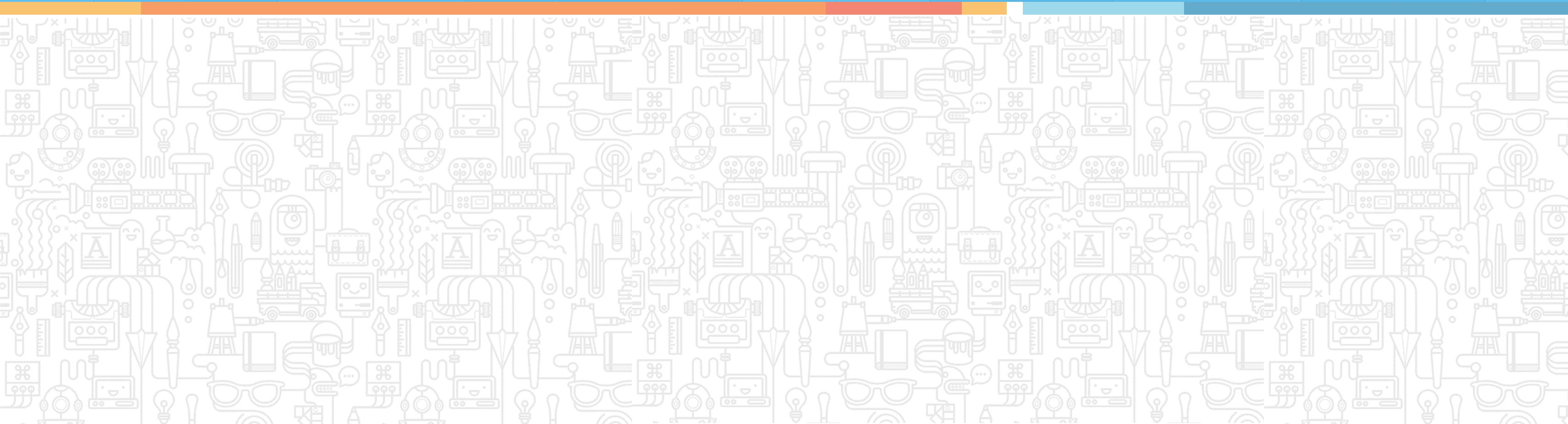
Keep the following points in mind when creating checkbox fields:

- It is a basic confirmation field.

- It can be used to trigger workflow rules or create basic reporting criteria.

- It shows as true or false on exports.
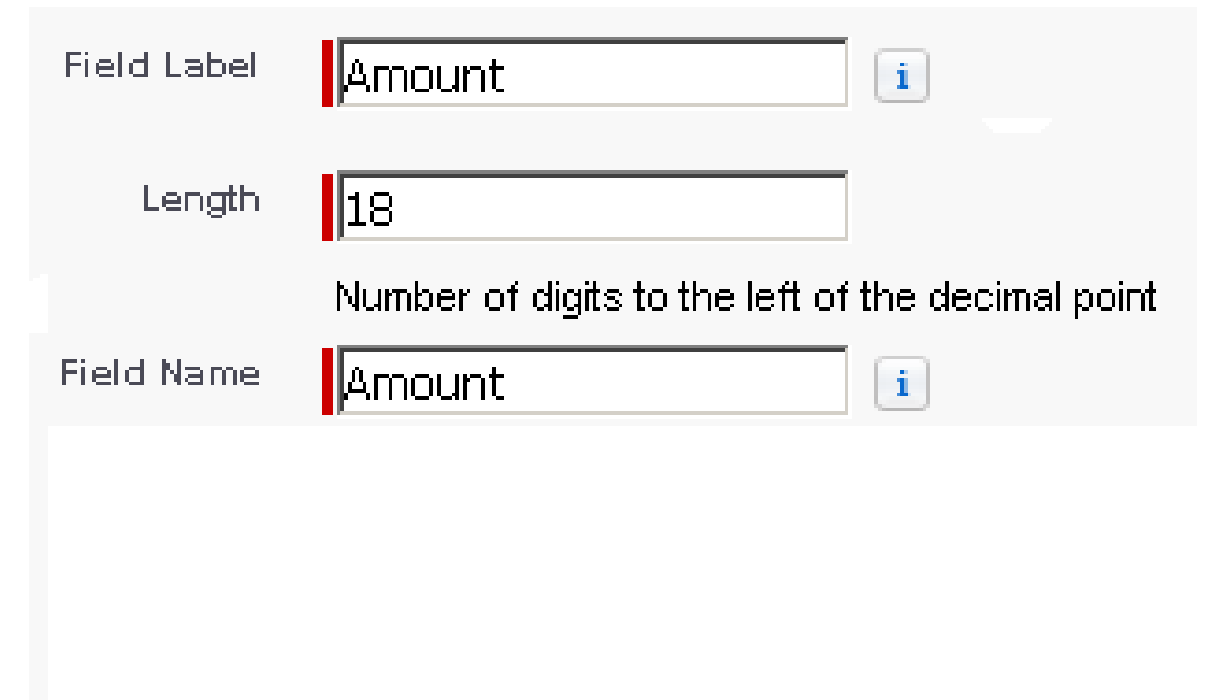
Field Label	Disclosures Received	i
Default Value	○ Checked ⊙ Unchecked	
Field Name	Disclosures_Received	i

Creating Currency, Number, and Percent Fields

Keep the following points in mind when creating

Currency, Number, and Percent fields:

- Currency fields are perfect for money-based

  records, like opportunities or orders.

- Number fields are used for more general

  metrics, like total number of records.

- Percentages can be used to calculate

  commissions or other ratio-based reports.

Field Label	Amount	ℹ
Length	18	

Number of digits to the left of the decimal point

Field Name	Amount	ℹ

Creating Date Field and Date and Time Field

Keep the following points in mind when creating date field

and date and time fields:

- Date fields are used in date-only sensitive information,

  such as close dates or due dates.

- Date and time fields are used for date and time-sensitive

  metrics.

- Date field is the easiest to use; date and time field

  requires correct formatting to be saved.
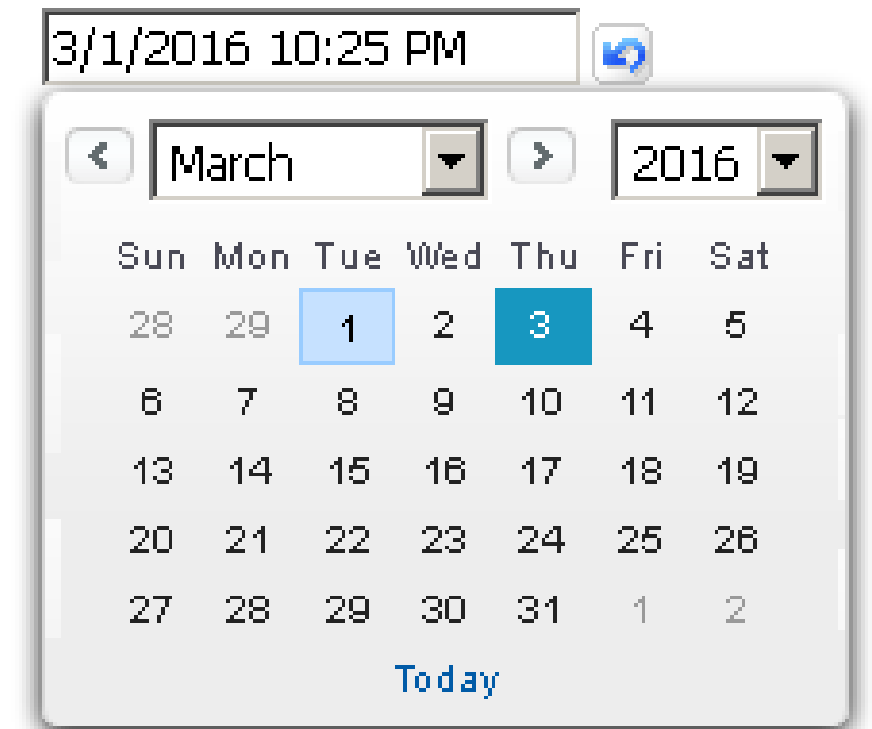
Creating Phone and Email Fields

Keep the following points in mind when creating phone

and email fields:

- Phone fields can accept any formatting, including

  extension numbers.

- The Email field is very specific: only correctly formatted

  emails can be saved.

| Phone | (847) 370-3429 |
| Company Email | info@expeditefinancial.com [M Gmail] |

Creating Geolocation Fields

Creating Geolocation Fields

Following are the features of Geolocation fields:

- Used in applications for mapping.

- Can be used to determine distance between two points or records.

- Must be used with correct formatting.

- Commonly used with outside integration.

Latitude	34°8'54"N 34°8'54"E
Longitude	89°6'49"S 89°6'49"W

Creating Picklist and Multi-Select Picklist Fields

Keep the following points in mind when creating picklist and multi-select picklist fields:

- Picklist fields offer an easy menu of pre-made options, such as status or type fields.

- Multi-select picklist fields are good for categorizing records with more than one option, such as product interest.

- Be careful when deleting or deactivating picklist values.

Field Label	Status
Field Name	Status
API Name	Status__c
Description	
Help Text	
Created By	Justin Davis, 3/28/2015 6:20 PM

Picklist Values   [New] [Reorder] [Replace]

Action	Values	Chart Colors
Edit | Del	Prospecting	Assigned dynamically
Edit | Del	Active	Assigned dynamically
Edit | Del	Inactive	Assigned dynamically
Edit | Del	Disqualified	Assigned dynamically

Creating Text and Text Area Fields

Creating Text and Text Area Fields

Keep the following points in mind when creating text and text area fields:

- Text fields are used for typing brief notes or unstructured comments, plain text.

- Text area fields create a pop-up box for typing larger and unstructured information.
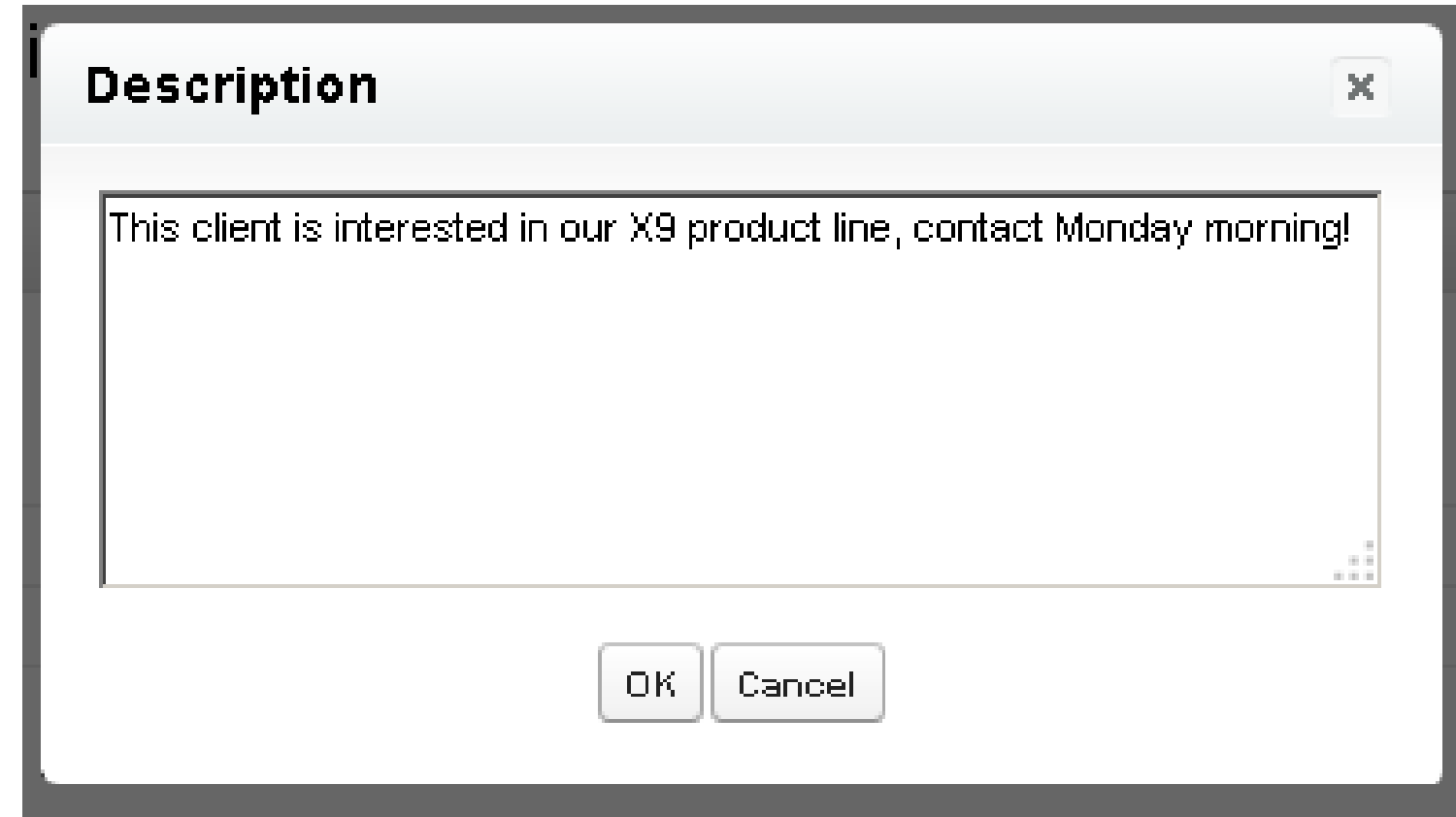
Field Information

Field Label	Description
Data Type	Long Text Area(32000)
Help Text	

Creating Text Area Long and Text Area Rich Fields

Keep the following points in mind when creating

text area long and text area rich fields:

- Text area long fields can contain larger amounts

  of information, up to 32,000 characters.

- Text area rich fields allow for basic formatting,

  such as italics, bold, underlining, and images.

Description

This client is interested in our X9 product line, contact Monday morning!

OK   Cancel

Considerations for Field Type Change

You can convert custom fields for which no data exists. Data type change can cause data loss while changing:

- ➢ To or from type Date or Date/Time

- ➢ To Number from any other type

- ➢ To Percent from any other type

- ➢ To Currency from any other type

- ➢ From Checkbox to any other type

- ➢ From Picklist (Multi-Select) to any other type

- ➢ From Auto Number to any other type

- ➢ To Auto Number from any type except Text

- ➢ From Text to Picklist

- ➢ From Text Area (Long) to any type except Email, Phone, Text, Text Area, or URL

Field Deleting Implications

Field Deleting Implications

01 Before deleting a field, check if it is referenced, as you can't delete it if referenced

02 If that field is being updated by a background job, you can't delete and need to wait until the background job finishes
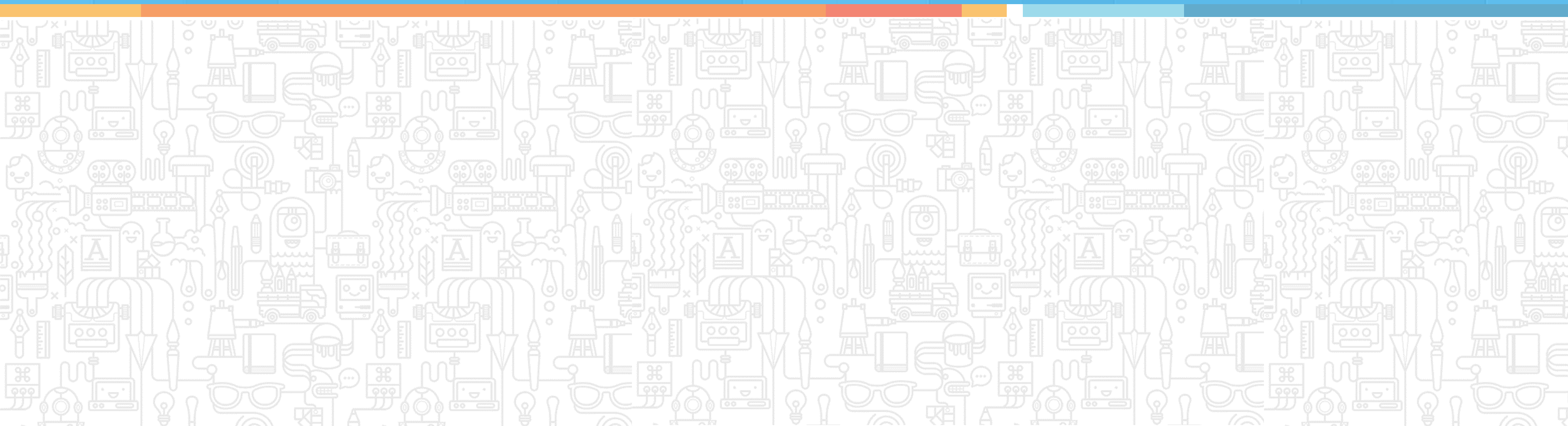
03 All the field history data is deleted when you delete a custom field

04 A background process regularly runs that cleans up the metadata associated with deleted custom fields

Creating Encrypted Fields

Creating Encrypted Fields

Keep the following points in mind when using encrypted fields:

- It is for safekeeping of social security numbers, credit card numbers, or other sensitive information.

- It is secured in the browser as well as in the Salesforce data center using 128-bit encryption.

- Only profiles enabled with the view encrypted fields permission can view the entire field.

Creating URL Fields

Keep the following points in mind when using URL

fields:

- They are basic fields for storing website

  addresses.

- They must be used with proper formatting.

- They can be created on any object.

Website   www.expeditelabs.com

Quiz

QUIZ 1

Which is the best field to use for single-option drop-down menus?

a. Phone

b. Picklist

c. Picklist (Multi-Select)

d. Text

QUIZ 1

Which is the best field to use for single-option drop-down menus?

a. Phone

b. Picklist

c. Picklist (Multi-Select)

d. Text

The correct answer is **b**.

Picklist fields are perfect for selecting one option from a drop-down menu.

QUIZ 2

Which field offers an additional level of security?

a. Text

b. Email

c. Text (Encrypted)

d. Checkbox

QUIZ 2

Which field offers an additional level of security?

a. Text

b. Email

c. Text (Encrypted)

d. Checkbox

The correct answer is c.

Encrypted fields secure the data in the database with 128-bit encryption.

QUIZ 3

Which field is the best for large note-taking?

a. Text Area (Long)

b. Text

c. Text Area

d. Text Area (Rich)

QUIZ 3

Which field is the best for large note-taking?

a. Text Area (Long)

b. Text

c. Text Area

d. Text Area (Rich)

The correct answer is **a**.

The long text area field is most appropriate for note taking purposes.

QUIZ 4

Which of the following fields is open text but requires correct formatting?

a. Phone

b. Currency

c. Email

d. Checkbox

44

QUIZ 4	Which of the following fields is open text but requires correct formatting?

a. Phone

b. Currency

c. Email

d. Checkbox

The correct answer is **c**.

The email field requires a perfectly-formatted email address in order to save the change.

QUIZ 5

Which field can be used to calculate percentages?

a. Roll-Up Summary

b. Picklist

c. Text

d. Formula

QUIZ 5

Which field can be used to calculate percentages?

a.   Roll-Up Summary

b.   Picklist

c.   Text

d.   Formula

The correct answer is **d**.

Formula fields can be used to calculate percentages and perform any general calculation.

Knowledge Check

Scenario | Analysis | Solution

United Containers is facing issues while calculating commissions for opportunities. Currently the Sales Managers are required to export all sales to a spreadsheet and then use Excel to perform formula calculations. Once this is completed, the Managers send it to the accounting team for payment. This entire process is prone to errors.

Click **Analysis** *to know the team's next move.*

Case Study

Scenario **Analysis** **Solution**

United Containers decided to create formula fields to calculate commissions for the following reasons:

1. Percentages can be based on any currency field on Opportunities.

2. Formulas can be User-specific or utilize any other criteria for calculations.

3. Formulas cannot be edited by users once calculated.

Click **Solution** *to know the company's decision.*

Case Study

Scenario | Analysis | **Solution**

The System Administrator of United Containers took the following steps:

1. A new formula was created on Opportunities called "Commissions".

2. This formula contained the correct calculations for displaying the amount of commissions.

3. An opportunity report was created to display this new formula field.

Proceed forward to view the demo.

Key Takeaways

- Salesforce has a wide range of fields.

- Some fields such as formulas have system-generated values.

- Picklist and Multi-select picklist assist with fast data entry.

- Text fields are flexible and can be used for a wide range of scenarios.

This concludes 'Field Types.'

The next lesson is 'Salesforce Objects.'