

Exam.5 Notes on Changing Custom Field Types

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Consider the following before converting fields:

- Only convert custom fields for which no data exists or you risk losing your data.

Changing the data type of an **existing custom field can cause data loss** in the following situations:

- Changing to or from type **Date or Date/Time**
- Changing to **Number** from any other type
- Changing to **Percent** from any other type
- Changing to **Currency** from any other type
- Changing from **Checkbox** to any other type
- Changing from **Picklist (Multi-Select)** to any other type
- Changing to **Picklist (Multi-Select)** from any other type

Currently defined picklist values are retained when you change a picklist to a multi-select picklist. If records contain values that are not in the picklist definition, those values are deleted from those records when the data type changes.

- Changing from **Auto Number** to any other type
- **Changing to Auto Number from any type except Text**
- Changing from Text to **Picklist**
- Changing from **Text Area (Long)** to any type except **Email, Phone, Text, Text Area, or URL**

- **If data is lost, any list view based on the custom field is deleted, and assignment and escalation rules may be affected.**
- **You can't change the data type of any custom field that is mapped for lead conversion.**
- If you change the data type of a custom field that is set as an external ID, choosing a data type other than **text, number, or email** causes the field to no longer act as an external ID.
- The option to change the data type of a custom field is not available for all data types. For example, existing custom fields cannot be converted into encrypted fields nor can encrypted fields be converted into another data type.
- In Salesforce **Knowledge article types**, the **file field type can't be converted** into other data types.
- You **cannot change the data type of a custom field referenced by other items in**

Setup, like Visualforce pages, Apex code, Process Builder, or flows.

- Changing a custom field type may require changing many records at once. To process these changes efficiently, your request may be queued and you may receive an email notification when the process has completed.
- Before changing a custom field's type, make sure that it isn't the target of a workflow field update or referenced in a field update formula that would be invalidated by the new type.

The following data types have additional restrictions when you convert them:

DATA TYPE	DESCRIPTION
Auto Number	The data in any auto-number field remains unchanged if you convert it into a text field. Also, you can safely convert a text custom field into an auto-number field without losing your data. Converting an auto-number field into any other data type results in data loss. Auto-number fields can contain a maximum of 30 characters. Before converting a text custom field into an auto-number field, change any records that contain more than 30 characters in that field.
Formula	Formula fields are special read-only fields that cannot be converted to any other data type. Likewise, you cannot convert any other field type into a formula field.
Picklist	Changing your custom picklists into custom checkboxes is simple. If you select Checkbox as the new data type, you can choose which picklist values to map to checked boxes and unchecked boxes. You can change custom picklists into multi-select picklists without losing any data. Since your records only contain a single value of that picklist, that value is still selected but users can select more values.
Relationships	<ul style="list-style-type: none"> • You can convert relationship fields to nonrelationship fields and vice versa, but only on external objects. • If your organization has a large number of records, Salesforce displays a waiting page after you have requested to change a master-detail into a lookup relationship or a lookup into a master-detail relationship. • After you have created a roll-up summary field on an object, you cannot convert the object's master-detail relationship into a lookup relationship. • A lookup cannot be converted to a master detail relationship if there are any existing records on the object that have a null value set for the lookup relationship. • If you are converting a master-detail relationship to a lookup for a custom object on the "detail" side, the organization-wide default for the object is automatically updated to Public Read/Write. Similarly, converting a lookup to a master-detail-relationship changes the organization-wide default to Controlled by Parent
Text Area (Long)	When you convert a long text area field to an Email, Phone, Text, Text Area, or URL type field, the data in your records is truncated to the first 255 characters of the field.
Text Area (Rich)	You can only convert rich text area fields into long text area fields. Any images are deleted the next time the long text area field is saved. After converting, markup is

hidden in the long text area field but it is not removed from the record until you save the record. That way, the markup can be restored if you change your mind.

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