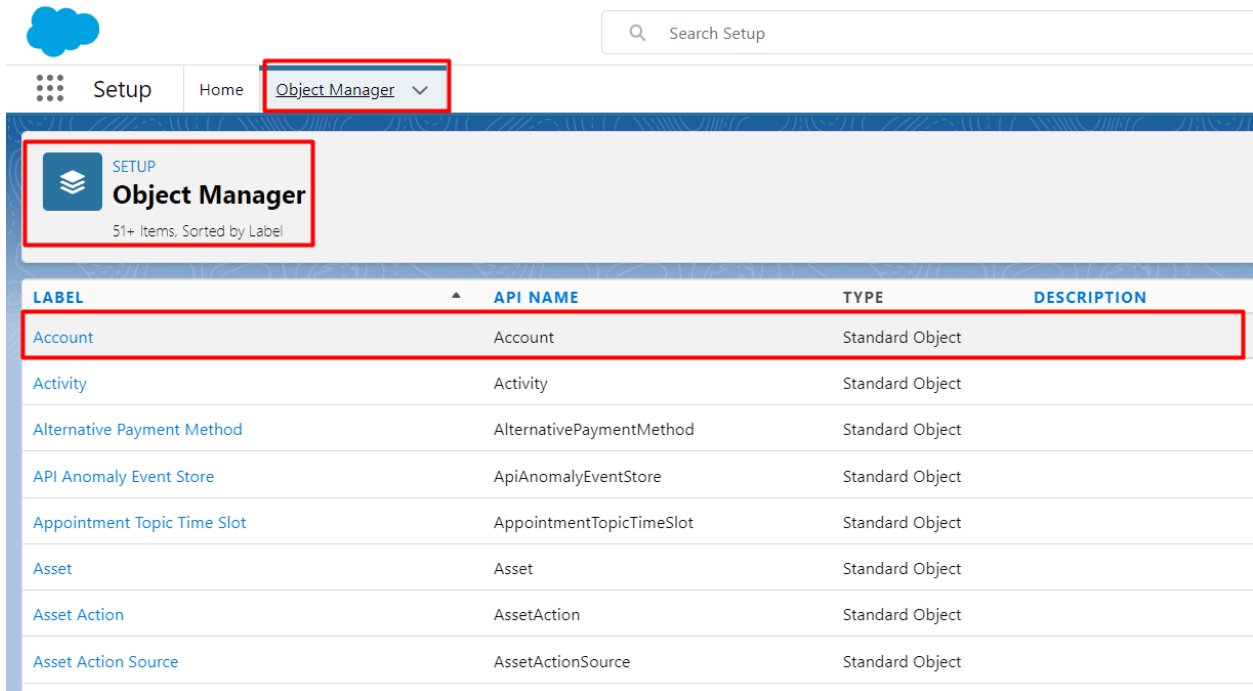


Lecture 11: Creating text fields.

In salesforce we have a variety of data types to create fields so in this lesson we are going to discuss text related fields.

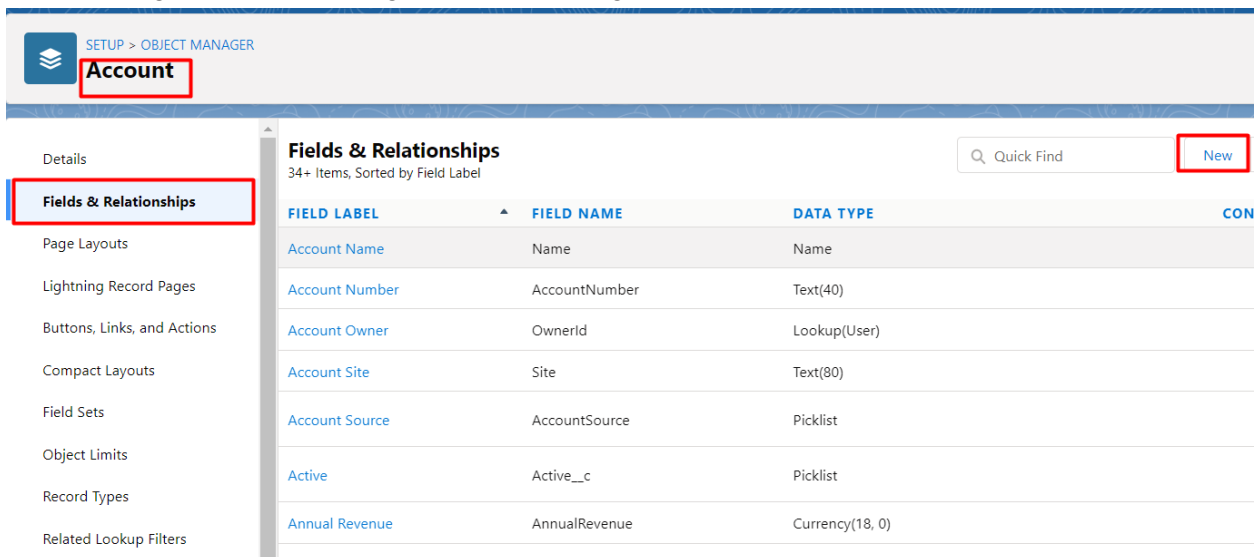
Step 1: First you have to click on the object manager and open any object. For this lesson I am taking objects as an account.



The screenshot shows the Salesforce Setup interface. The top navigation bar includes the Setup icon, a search bar labeled "Search Setup", and tabs for Setup, Home, and Object Manager (highlighted with a red box). Below the navigation bar, the "Object Manager" section is highlighted with a red box, showing "51+ Items, Sorted by Label". A table lists various objects, with the "Account" object highlighted by a red box. The table has columns for LABEL, API NAME, TYPE, and DESCRIPTION.

LABEL	API NAME	TYPE	DESCRIPTION
Account	Account	Standard Object	
Activity	Activity	Standard Object	
Alternative Payment Method	AlternativePaymentMethod	Standard Object	
API Anomaly Event Store	ApiAnomalyEventStore	Standard Object	
Appointment Topic Time Slot	AppointmentTopicTimeSlot	Standard Object	
Asset	Asset	Standard Object	
Asset Action	AssetAction	Standard Object	
Asset Action Source	AssetActionSource	Standard Object	

Step 2: As you open "account" you have to now go to fields and relationships and click on the new option given on the top right side of the page.



The screenshot shows the Salesforce Setup interface for the "Account" object. The top navigation bar includes the Setup icon, a breadcrumb "SETUP > OBJECT MANAGER", and the "Account" object name (highlighted with a red box). Below the navigation bar, the "Fields & Relationships" section is highlighted with a red box. A table lists various fields, with the "Account Name" field highlighted by a red box. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, and CON. A "New" button is highlighted with a red box in the top right corner.

FIELD LABEL	FIELD NAME	DATA TYPE	CON
Account Name	Name	Name	
Account Number	AccountNumber	Text(40)	
Account Owner	OwnerId	Lookup(User)	
Account Site	Site	Text(80)	
Account Source	AccountSource	Picklist	
Active	Active__c	Picklist	
Annual Revenue	AnnualRevenue	Currency(18, 0)	

Step 3: When you click on a new option it will show you all available data types as you scroll down you will see the data type mentioned as “Text”.

<input type="radio"/> Date/Time	Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the p
<input type="radio"/> Email	Allows users to enter an email address, which is validated to ensure proper format. If this field is specified fo
<input type="radio"/> Geolocation	Allows users to define locations. Includes latitude and longitude components, and can be used to calculate c
<input type="radio"/> Number	Allows users to enter any number. Leading zeros are removed.
<input type="radio"/> Percent	Allows users to enter a percentage number, for example, "10" and automatically adds the percent sign to the
<input type="radio"/> Phone	Allows users to enter any phone number. Automatically formats it as a phone number.
<input type="radio"/> Picklist	Allows users to select a value from a list you define.
<input type="radio"/> Picklist (Multi-Select)	Allows users to select multiple values from a list you define.
<input checked="" type="radio"/> Text	Allows users to enter any combination of letters and numbers.
<input type="radio"/> Text Area	Allows users to enter up to 255 characters on separate lines.
<input type="radio"/> Text Area (Long)	Allows users to enter up to 131,072 characters on separate lines.
<input type="radio"/> Text Area (Rich)	Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.
<input type="radio"/> Text (Encrypted) ⓘ	Allows users to enter any combination of letters and numbers and store them in encrypted form.
<input type="radio"/> Time	Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:50.600" are all va
<input type="radio"/> URL	Allows users to enter any valid website address. When users click on the field, the URL will open in a separa

Step 4:After clicking on text you have to click on next, step two is to enter details like field label, length, name, description etc. here I am naming it as “Account Text” and providing length as 255 and clicking on next.

Step 2. Enter the details

Field Label	<input type="text" value="Account Text"/> ⓘ
Please enter the maximum length for a text field below.	
Length	<input type="text" value="255"/>
Field Name	<input type="text" value="Account_Text"/> ⓘ
Description	<div></div>
Help Text	<div></div> ⓘ
Required	<input type="checkbox"/> Always require a value in this field in order to save a record
Unique	<input type="checkbox"/> Do not allow duplicate values
	<input checked="" type="radio"/> Treat "ABC" and "abc" as duplicate values (case insensitive)
	<input type="radio"/> Treat "ABC" and "abc" as different values (case sensitive)
External ID	<input type="checkbox"/> Set this field as the unique record identifier from an external system
Auto add to custom report type	<input checked="" type="checkbox"/> Add this field to existing custom report types that contain this entity ⓘ
Default Value	Show Formula Editor

Step 5: Once you click on next, step third is to establish a field level security. In this step I am clicking on visible and clicking on next.

Step 3. Establish field-level security

Field Label Account Text
Data Type Text
Field Name Account_Text
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
Analytics Cloud Integration User	<input checked="" type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>
Authenticated Website	<input checked="" type="checkbox"/>
Authenticated Website	<input checked="" type="checkbox"/>
bgb	<input checked="" type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>

Step 6: Step four is to add page layouts. Right now I am deselecting all the checkboxes. Later on I will be manually placing it on the account layout. After doing that click on save .

Account
New Custom Field

Step 4. Add to page layouts

Field Label Account Text
Data Type Text
Field Name Account_Text
Description

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any page

To change the location of this field on the page, you will need to customize the page layout.

<input type="checkbox"/> Add Field	Page Layout Name
<input type="checkbox"/>	Account (Marketing) Layout
<input type="checkbox"/>	Account (Sales) Layout
<input type="checkbox"/>	Account (Support) Layout
<input type="checkbox"/>	Account Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.