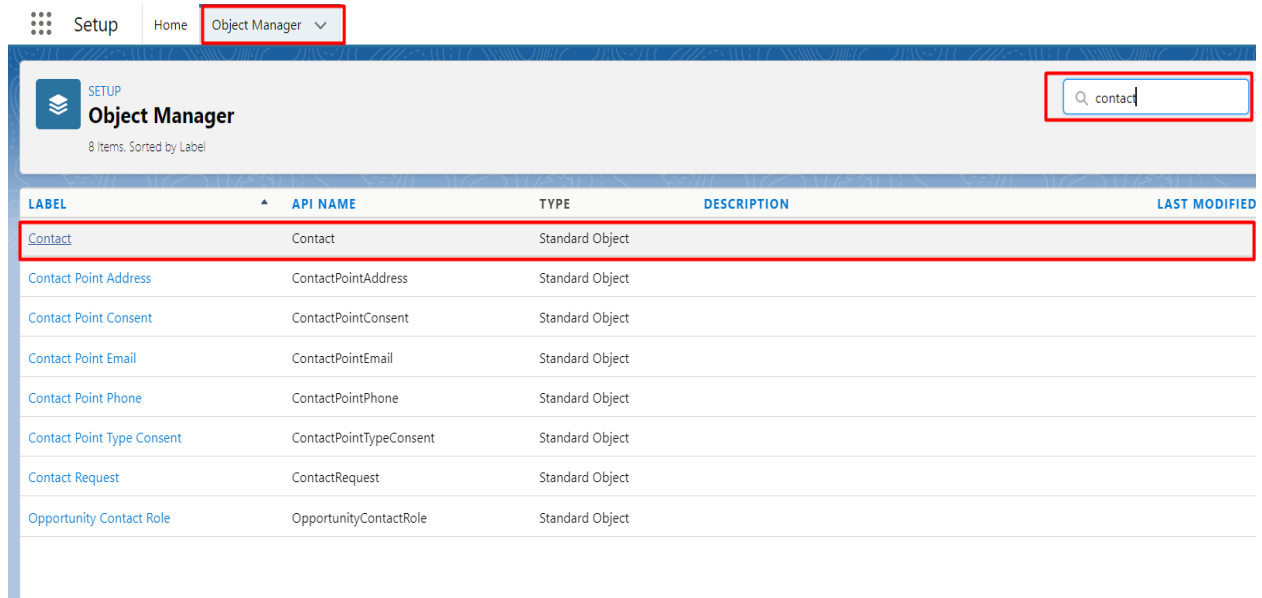


Lecture 1: Creating fields using picklist.

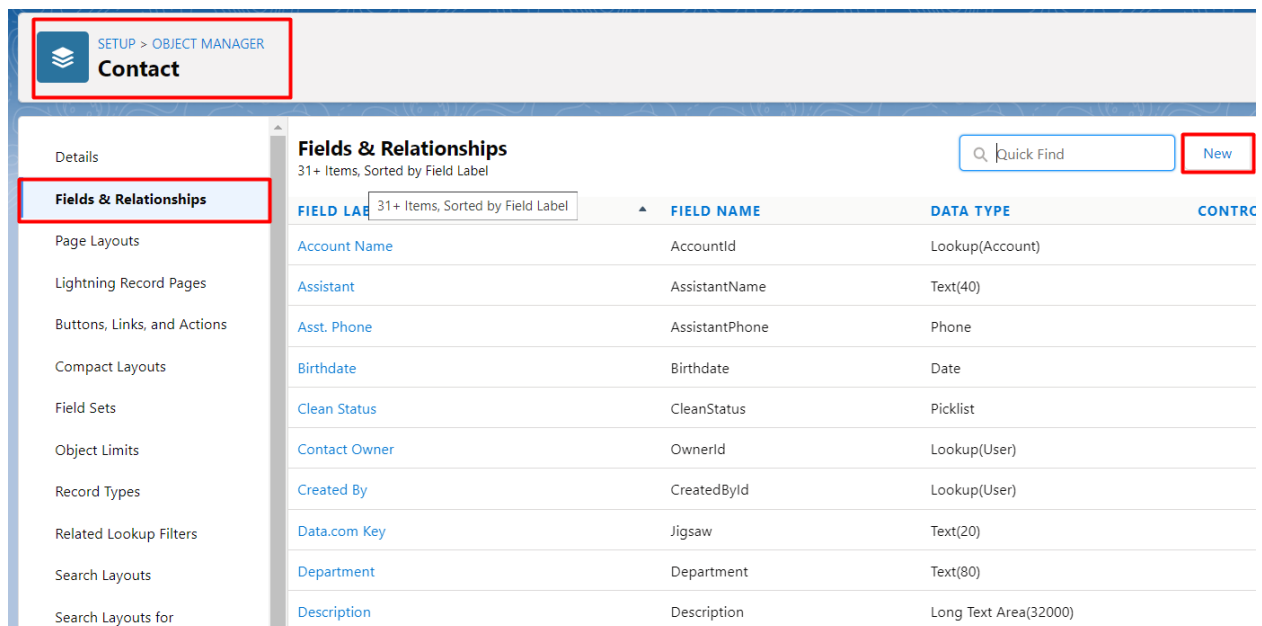
Step 1: In this session we will learn how to create fields using picklist. In order to create a field using picklist we have to first click on object manager and search for object “contact”.



The screenshot shows the Salesforce Setup page. The 'Object Manager' tab is selected in the top navigation bar. A search bar in the top right corner contains the text 'contact'. Below the search bar, a table lists objects. The first row, 'Contact', is highlighted with a red border. The table has columns: LABEL, API NAME, TYPE, DESCRIPTION, and LAST MODIFIED.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED
Contact	Contact	Standard Object		
Contact Point Address	ContactPointAddress	Standard Object		
Contact Point Consent	ContactPointConsent	Standard Object		
Contact Point Email	ContactPointEmail	Standard Object		
Contact Point Phone	ContactPointPhone	Standard Object		
Contact Point Type Consent	ContactPointTypeConsent	Standard Object		
Contact Request	ContactRequest	Standard Object		
Opportunity Contact Role	OpportunityContactRole	Standard Object		

Step 2: Click on contact object to open and click on fields and relationships available on the left hand side. After opening fields and relationships, select new.



The screenshot shows the Salesforce 'Contact' object page. The 'Fields & Relationships' tab is selected in the left-hand navigation menu. The main content area displays a table of fields. The first row, 'Account Name', is highlighted with a red border. The table has columns: FIELD LABEL, FIELD NAME, DATA TYPE, and CONTR. A 'New' button is visible in the top right corner.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTRC
Account Name	AccountId	Lookup(Account)	
Assistant	AssistantName	Text(40)	
Asst. Phone	AssistantPhone	Phone	
Birthdate	Birthdate	Date	
Clean Status	CleanStatus	Picklist	
Contact Owner	OwnerId	Lookup(User)	
Created By	CreatedById	Lookup(User)	
Data.com Key	Jigsaw	Text(20)	
Department	Department	Text(80)	
Description	Description	Long Text Area(32000)	

Step 3: Once you click on new you will be directed to the next page where you can see the options available for picklist and picklist (multi-select).so here I am selecting picklist and clicking on next.

<input type="radio"/> Currency	Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
<input type="radio"/> Date	Allows users to enter a date or pick a date from a popup calendar.
<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 pop-up, that date and the current time are entered into the Date/Time field.
<input type="radio"/> Email	Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send Email. Note that custom email addresses cannot be used for mass emails.
<input type="radio"/> Geolocation	Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
<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 number.
<input type="radio"/> Phone	Allows users to enter any phone number. Automatically formats it as a phone number.
<input checked="" 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 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 valid times for this field.
<input type="radio"/> URL	Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

[Next](#)

Step 4: After clicking next step no. two is to enter details like field label, values, name etc. Here I am putting field label as designation and selecting **“Enter values, with each value separated by a new line”** . After selecting it I have put values as Manager, CEO, COO, Director etc. field name will be generated by default. After putting all these details click next.

Step 2. Enter the details

Field Label

Designation

Values

☐ Use global picklist value set

☒ Enter values, with each value separated by a new line

COO
Sales executive
Sr developer
Manager
Director
Office Executive
QAA

☒ 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

Designation

Description

Help Text

Step 5: Step third is to establish a field level security so here I am selecting visible to all and clicking on next.

Step 3. Establish field-level security

Field Label Designation
Data Type Picklist
Field Name Designation
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"/>
bgbg	<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"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>

Step 6: Next step is to select page layout so I am disabling the layouts and clicking on save.

Contact
New Custom Field

Step 4. Add to page layouts

Field Label Designation
Data Type Picklist
Field Name Designation
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 pages if you do not select a layout.

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"/>	Contact (Marketing) Layout
<input type="checkbox"/>	Contact (Sales) Layout
<input type="checkbox"/>	Contact (Support) Layout
<input type="checkbox"/>	Contact Layout

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

Previous Save & New Save