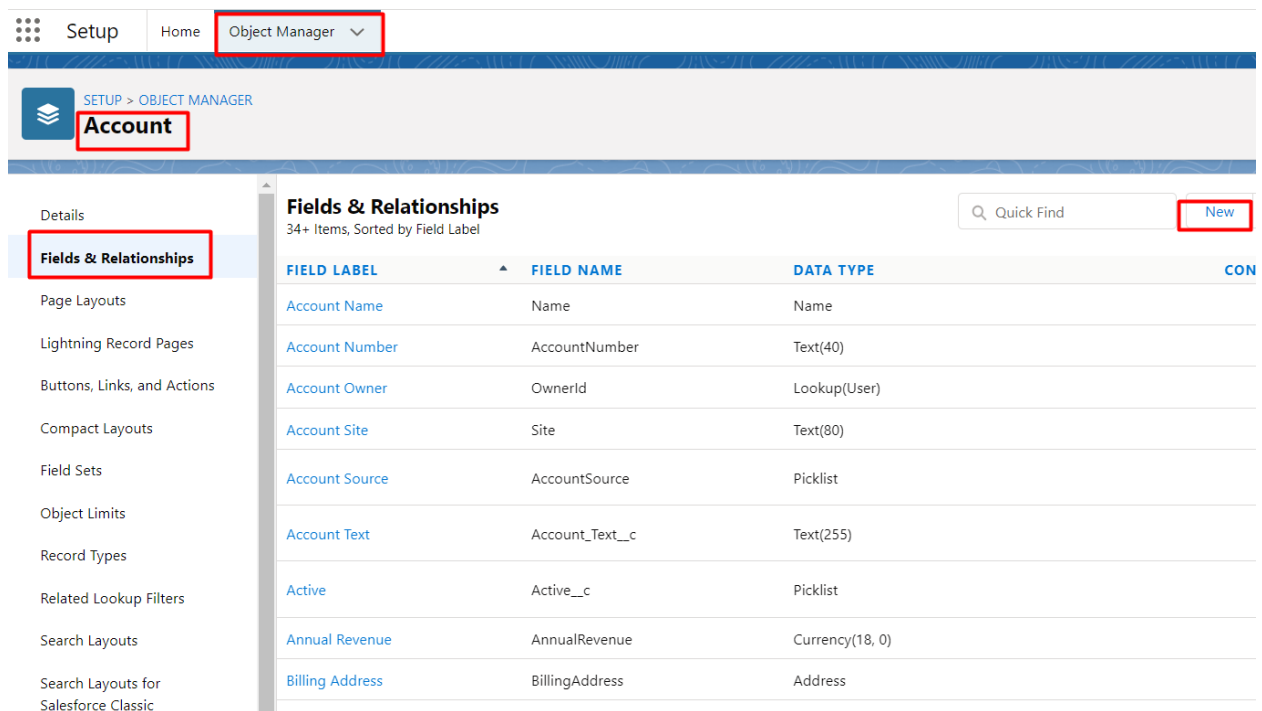


Lecture 2: Creating text area field.

Step 1: Following the same process as the previous lecture, go to object manager and click on any object (here account) then go to fields and relationship and press click on new.



Setup Home Object Manager

SETUP > OBJECT MANAGER

Account

Details

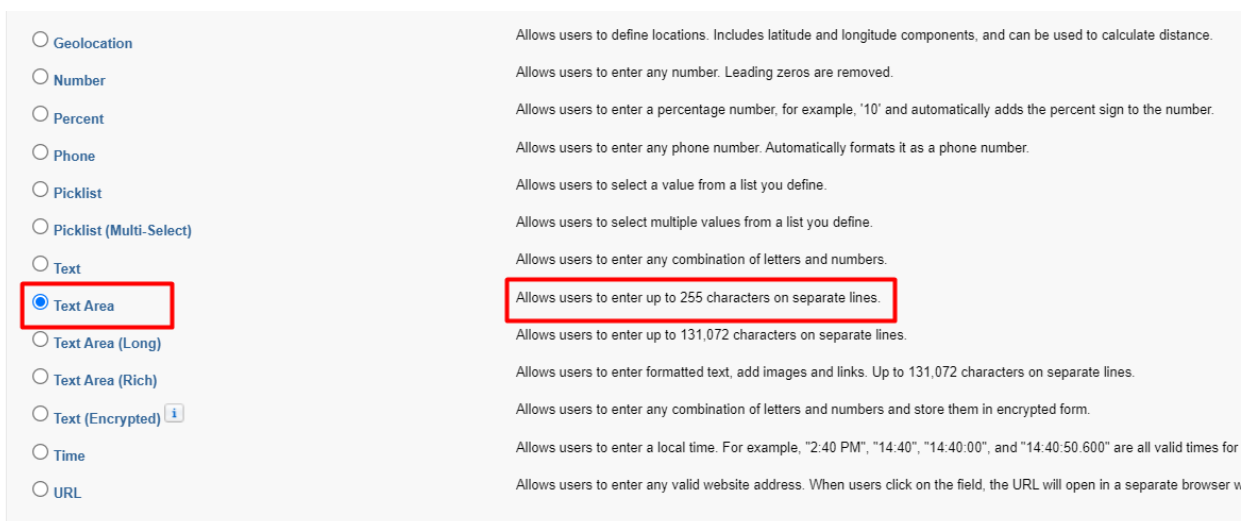
Fields & Relationships

34+ Items, Sorted by Field Label

Quick Find New

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	
Account Text	Account_Text__c	Text(255)	
Active	Active__c	Picklist	
Annual Revenue	AnnualRevenue	Currency(18, 0)	
Billing Address	BillingAddress	Address	

Step 2: On the next page scroll down and select the text area after selecting click on next.



☐ Geolocation

☐ Number

☐ Percent

☐ Phone

☐ Picklist

☐ Picklist (Multi-Select)

☐ Text

☒ **Text Area**

☐ Text Area (Long)

☐ Text Area (Rich)

☐ Text (Encrypted) i

☐ Time

☐ URL

Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.

Allows users to enter any number. Leading zeros are removed.

Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.

Allows users to enter any phone number. Automatically formats it as a phone number.

Allows users to select a value from a list you define.

Allows users to select multiple values from a list you define.

Allows users to enter any combination of letters and numbers.

Allows users to enter up to 255 characters on separate lines.

Allows users to enter up to 131,072 characters on separate lines.

Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.

Allows users to enter any combination of letters and numbers and store them in encrypted form.

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

Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser w

Step 3: Step 2 is to enter details here I am entering the account label as “Acc Text Area” and clicking on next.

Step 2. Enter the details

Field Label ⓘ

Field Name ⓘ

Description

Help Text ⓘ

Required ☐ Always require a value in this field in order to save a record

Auto add to custom report type ☒ Add this field to existing custom report types that contain this entity ⓘ

Default Value

Use [formula syntax](#). Enclose text and picklist value API names in double quotes: ("the_text"), include numbers without quotes: (25), show percentages as decimals: (0.10), and express date calculations in the standard format: (Today() + 7). To reference a field from a Custom Metadata type record use: SCustomMetadata.Type__mdt.RecordAPIName.Field__c

Step 4: Step 3 is establishing a field level security here I am clicking on visible and clicking on next.

Step 3. Establish field-level security

Field Label Acc Text area

Data Type Text Area

Field Name Acc_Text_area

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 type="checkbox"/> Visible
Analytics Cloud Integration User	<input checked="" type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>
Authenticated Website	<input type="checkbox"/>
Authenticated Website	<input 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 5: Step 4 is to select page layout. Here I am deselecting all the options just like the previous lecture and clicking on save

Account

New Custom Field

Step 4. Add to page layouts

Field Label	Acc Text area
Data Type	Text Area
Field Name	Acc_Text_area
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 layout that is not selected.

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.