

Lecture 2: Creating picklist fields via global value set.

In the previous session we created a global value set. In this lecture we will learn about creating picklist fields via global value set.

Step 1: First step is to click on object manager and Select “Account” as we click on account we will be directed to the next page where we can see an option available as fields and relationship.

The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The 'Object Manager' dropdown is highlighted. Below the navigation bar, the breadcrumb trail shows 'SETUP > OBJECT MANAGER' and 'Account'. The left sidebar contains a list of options: Details, Fields & Relationships (highlighted), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and Search Layouts for Salesforce Classic. The main content area is titled 'Fields & Relationships' and shows a table of fields for the 'Account' object. The table has three columns: FIELD LABEL, FIELD NAME, and DATA TYPE. The fields listed are: Acc Text area, Acc Text area long, Account Name, Account Number, Account Owner, Account Site, Account Source, Account Text, and Active.

FIELD LABEL	FIELD NAME	DATA TYPE
Acc Text area	Acc_Text_area__c	Text Area(255)
Acc Text area long	Acc_Text_area_long__c	Long Text Area(32768)
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

Step 2: As you click on fields and relationships you will see an option available as “new”.

The screenshot shows the Salesforce Setup interface, specifically the 'Fields & Relationships' section for the 'Account' object. The left sidebar is the same as in the previous screenshot. The main content area is titled 'Fields & Relationships' and shows a table of fields for the 'Account' object. The table has three columns: FIELD LABEL, FIELD NAME, and DATA TYPE. The fields listed are: Acc Text area, Acc Text area long, Account Name, Account Number, Account Owner, Account Site, Account Source, Account Text, and Active. A 'New' button is visible in the top right corner of the table area.

FIELD LABEL	FIELD NAME	DATA TYPE	CON
Acc Text area	Acc_Text_area__c	Text Area(255)	Data Type
Acc Text area long	Acc_Text_area_long__c	Long Text Area(32768)	
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	

Step 3: As you click on new you will be directed to the next page where you will have to choose a field type, when you scroll down you will see an option available as picklist, selecting it as of now and clicking on next .

The screenshot shows a list of field types on the left and their descriptions on the right. The 'Picklist' option is selected and highlighted with a red box. The 'Next' button is also highlighted with a red box in the bottom right corner.

Field Type	Description
<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 spread
<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
<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.

Step 4: Step no. two is to enter details such as label, field name, values etc. Here I am putting label as Weekdays field name will be auto generated. Here in this lecture for values I am selecting “Use global picklist value set” and clicking on weekdays after clicking on “None”. As per global value set configuration the options “Display values alphabetically, not in the order entered” and “Use first value as default value” are disabled. After providing this information, click on next.

The screenshot shows the 'Step 2. Enter the details' form. The 'Field Label' is 'Weekdays'. The 'Values' section has 'Use global picklist value set' selected. The 'Field Name' is 'Weekdays'. The 'Required' checkbox is unchecked. The 'Auto add to custom report type' checkbox is checked.

Step 2. Enter the details

Field Label Weekdays ⓘ

Values ☒ Use global picklist value set
☐ Enter values, with each value separated by a new line

Weekdays ▾
--None--
Weekdays ⓘ

☐ 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 Weekdays ⓘ

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 ⓘ

Step 5: Step three is to establish a field level security, selecting visible to all and clicking on next.

Step 3. Establish field-level security

Field LabelWeekdays

Data TypePicklist

Field NameWeekdays

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"/>
Customer Community Login User	<input checked="" type="checkbox"/>

Step 6: Next step is to add an account layout. Here I am choosing “account layout” and clicking on save.

Account

New Custom Field

Help for this

Step 4. Add to page layouts **Step**

Field LabelWeekdays

Data TypePicklist

Field NameWeekdays

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

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

Previous

Save & New

Save

Step 7: Moving to app launcher and opening service, clicking on Account object Tab and opening a particular account record.

The screenshot shows the Salesforce interface. At the top, there is a navigation bar with a cloud icon, a search bar labeled 'Search Accounts and more...', and a menu with items: All, Home, Chatter, Accounts (highlighted with a red box), Contacts, Cases, Reports, and Dashboards. Below the navigation bar, the 'Accounts' section is active, showing a 'Recently Viewed' list. The list contains one item, 'Dickenson plc', which is highlighted with a red box. The table has columns for 'Account Name', 'Account Site', and 'Phone'. Below the table, there is a dropdown menu for 'Dickenson plc'.

	Account Name	Account Site	Phone
1	Dickenson plc		(785) 241-6200

Step 8: As you open the account record and move to details you can see the Weekday picklist.

The screenshot shows the details of the 'Dickenson plc' account record. The header includes the account name, a 'Start timer' button, and a 'Parent Account' link. The main content area is divided into two columns of fields. The left column includes 'Account Number' (CC634267), 'Account Site', 'Type' (Customer - Channel), 'Industry' (Consulting), 'Annual Revenue' (\$50,000,000), 'counts of colleges' (0), and 'property date'. The right column includes 'Fax' ((785) 241-6201), 'Website' (dickenson-consulting.com), 'Ticker Symbol', 'Ownership' (Private), 'Employees' (120), and 'SIC Code' (6752). At the bottom, there is a 'Weekdays' picklist, which is highlighted with a red box.

Dickenson plc	(785) 241-6200
Parent Account	Fax (785) 241-6201
Account Number CC634267	Website dickenson-consulting.com
Account Site	Ticker Symbol
Type Customer - Channel	Ownership Private
Industry Consulting	Employees 120
Annual Revenue \$50,000,000	SIC Code 6752
counts of colleges 0	
property date	
Weekdays	

Step 9: As you click on edit option for weekday picklist you will be able to see all the options that we provided are available here and we can choose anyone on of it and click on save .

The screenshot shows a form with a dropdown menu for selecting a weekday. The dropdown is open, showing options: --None--, mon (selected), tue, wed, thu, fri, sat, sun. The 'mon' option is highlighted in a red box. Below the dropdown are fields for Billing Address and Shipping Address, each with Street, City, State/Province, Zip/Postal Code, and Country. The 'Save' button is highlighted in a red box.

Step 10: Now let's try to create another picklist using the global value set on the contact object. Clicking on object manager and selecting "Contact" after selecting Repeating all the previous process and clicking on save. Now as we move again to service and click on the contact tab as you open a contact record in the details section you will be able to see a picklist available as weekdays.

The screenshot shows a CRM interface. The top navigation bar has a 'Service' tab selected, and the 'Contacts' dropdown is also highlighted. Below, the 'Details' tab is selected for a contact record for Mr. Andy Young. The 'Weekdays' picklist is highlighted in a red box.

Field	Value
Contact Owner	astha gupta
Name	Mr Andy Young
Account Name	Dickenson plc
Title	SVP, Operations
Department	Internal Operations
Birthdate	
Reports To	
Lead Source	Purchased List
Weekdays	
Phone	(785) 241-6200
Home Phone	
Mobile	(785) 265-5350
Other Phone	
Fax	
Email	a_young@dickenson.com
Assistant	
Asst. Phone	

