

Lecture 4: Creating text area (Rich).

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.

The screenshot shows the Salesforce Object Manager interface for the 'Account' object. The 'Object Manager' dropdown is highlighted in the top navigation bar. In the left sidebar, the 'Fields & Relationships' section is selected. The main content area displays a table of fields for the 'Account' object, with a 'New' button 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	
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 text area (Rich) after selecting click on next.

The screenshot shows the Salesforce field type selection screen. On the left, a list of field types is displayed, with 'Text Area (Rich)' selected and highlighted with a red box. On the right, a description for each field type is provided. The description for 'Text Area (Rich)' is also highlighted with a red box.

☐ Date: Allows users to enter a date or pick a date from a popup calendar.

☐ 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 time are entered.

☐ 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 enter an email address. Note that custom email addresses cannot be used for mass emails.

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

☐ Number: Allows users to enter any number. Leading zeros are removed.

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

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

☐ Picklist: Allows users to select a value from a list you define.

☐ Picklist (Multi-Select): Allows users to select multiple values from a list you define.

☐ Text: Allows users to enter any combination of letters and numbers.

☐ Text Area: Allows users to enter up to 255 characters on separate lines.

☐ Text Area (Long): Allows users to enter up to 131,072 characters on separate lines.

☒ Text Area (Rich): Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.

☐ Text (Encrypted): Allows users to enter any combination of letters and numbers and store them in encrypted form.

☐ 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.

☐ 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 3: Step 2 is to enter details here I am entering the account label as “Acc Text Area Rich” the length is selected by default also choosing visible lines as 10 and clicking on next.

Step 2. Enter the details

Field Label

You are currently using 32,768 out of 1,638,400 characters on this object. You have 1,605,632 additional characters to allocate to this object.

Length
(Max 131,072)

Visible Lines

Field Name

Description

Help Text

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

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

Field Name Acc_Text_area_Rich

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"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>
Customer Community Login User	<input checked="" type="checkbox"/>
Customer Community Plus Login User	<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 and new.

Step 4. Add to page layouts

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Field Label	Acc Text area Rich
Data Type	Rich Text Area
Field Name	Acc_Text_area_Rich
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 type="checkbox"/>	Account Layout

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

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