Configure a Segment to Default Statically or Dynamically

If appropriate, you can configure a segment to default to a specific value. You have the following options:

- You can configure a segment to default to a static choice. This default is used on any record type where the segment appears, unless overridden. For example, suppose you have a segment called Sales Region, which includes the values Americas, EMEA, and APAC. If the majority of your records require a value of Americas, you could specify that Americas is the default.

- You can create dynamic defaulting for specific categories of record types, such as transactions and entities. For example, you may have a segment called Sales Region that you have applied both to the Customer record type and to all sales transactions. You can configure the segment so that, when it occurs on a sales transaction, it defaults to the value selected on the corresponding customer record. This type of defaulting overrides static defaulting.

For details on defaults, see Validation and Static Default Values for Custom Segments.

Also, see Benefits of Custom Segments.

Related Topics