# Create a custom case field



Creating a custom case field will allow for the storing of ServiceNow incident numbers when messages are sent over to ServiceNow.

### **Prerequisites**

- 1 Install the Perspectium Package for Salesforce
- 1 Configure your Salesforce remote site settings
- 1 Configure Perspectium Replicator as a Salesforce connected app
- 1 Configure Perspectium properties for Salesforce

#### Procedure

To create a custom case field in Salesforce, follow these steps:



	Q Search Set	up 🔄 🖬 ? 🌣 🖡 🐻
Setup Home Object	t Manager 🗸	
SETUP > OBJECT MANAGER Case		
Details	<sup>Case</sup> New Cus	tom Field
Fields & Relationships	010.5.1	
Case Page Layouts	Step 2. Ent	er me details Step 2 of 4
Case Close Page Layouts		
Lightning Record Pages	Field Label	Correlation Id as the Field Label
Buttons, Links, and Actions	Length	Please enter the maximum length for a text of heline 255 as the Length
Compact Layouts	Field Name	Icorrelation_id Type correlation_id as the Field Name
Field Sets	Description	
Object Limits	Help Text	
Record Types		1
Related Lookup Filters	Required	Always require a value in this field in order to save a record
Search Layouts	Unique	Do not allow duplicate values  Treat "ABC" and "abc" as duplicate values (case insensitive)
Triggers	External ID	Treat "ABC" and "abc" as different values (case sensitive)
Validation Rules	Default Value	Show Formula Editor Use <u>formula syntax</u> : Enclose text and picklist value API names in double quotes : ("the text"), include numbers without quotes : (25), show percentages as decimats: (0.10), and express date calculations in the standard format: (Today() + 7)
		Previous Next Cancel



## **Next steps**

Create a Salesforce shared queue

# **Similar topics**

- Install the Perspectium Package for Salesforce
- Configure Salesforce remote site settings
- Configure Perspectium Replicator as a Salesforce connected app
  Configure Perspectium properties for Salesforce
- Create a custom case field

## **Contact Perspectium Support**



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