

Create a custom case field

Fluorine

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

Prerequisites

- ⚠️ [Install the Perspectium Package for Salesforce](#)
- ⚠️ [Configure your Salesforce remote site settings](#)
- ⚠️ [Configure Perspectium Replicator as a Salesforce connected app](#)
- ⚠️ [Configure Perspectium properties for Salesforce](#)

Procedure

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

1

Log into your Salesforce organization and click the  icon in the top right-hand corner of the screen. Then, click **Setup**.

2

In the Quick Find window on the left side of the screen, type and then click **Object Manager** (under **Objects and Fields**).

3

From the Object Manager list, click **Case**. Then, click **Fields and Relationships** on the left side of the screen. Finally, in the upper right-hand corner of the Fields & Relationships form, click **New**.

4

Under **Choose a field type**, choose **Text**. Then, at the bottom right-hand corner of the form, click **Next**.

5

Type **Correlation Id** as the field label, **255** for the Length, and **correlation_id** as the Field Name. Then, click **Next**.

Setup > OBJECT MANAGER
Case

Details
Fields & Relationships
Case Page Layouts
Case Close Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
Triggers
Validation Rules

Case
New Custom Field

Step 2. Enter the details Step 2 of 4

Field Label Correlation Id

Length 255

Field Name correlation_id

Description

Help Text

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

Unique ☐ Do not allow duplicate values

☐ Treat "ABC" and "abc" as duplicate values (case insensitive)

☐ Treat "ABC" and "abc" as different values (case sensitive)

External ID ☐ Set this field as the unique record identifier from an external system

Default Value Show Formula Editor

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)

Previous Next Cancel

6

Check the box next to **Visible** to grant view permission to all users. Then, click **Next**.

7

On the resulting form, ensure that the boxes are checked for all fields. Then, click **Save** to finish creating your custom Salesforce case field.

Next steps

[Create a Salesforce shared queue](#)

Similar topics

- [Configure Perspective Replicator as a Salesforce connected app](#)
- [SalesInsight for ServiceNow incidents and Salesforce cases](#)
- [Install the Perspective Package for Salesforce](#)
- [Configure Salesforce remote site settings](#)
- [Configure Perspective properties for Salesforce](#)

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