Create a custom case field

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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:

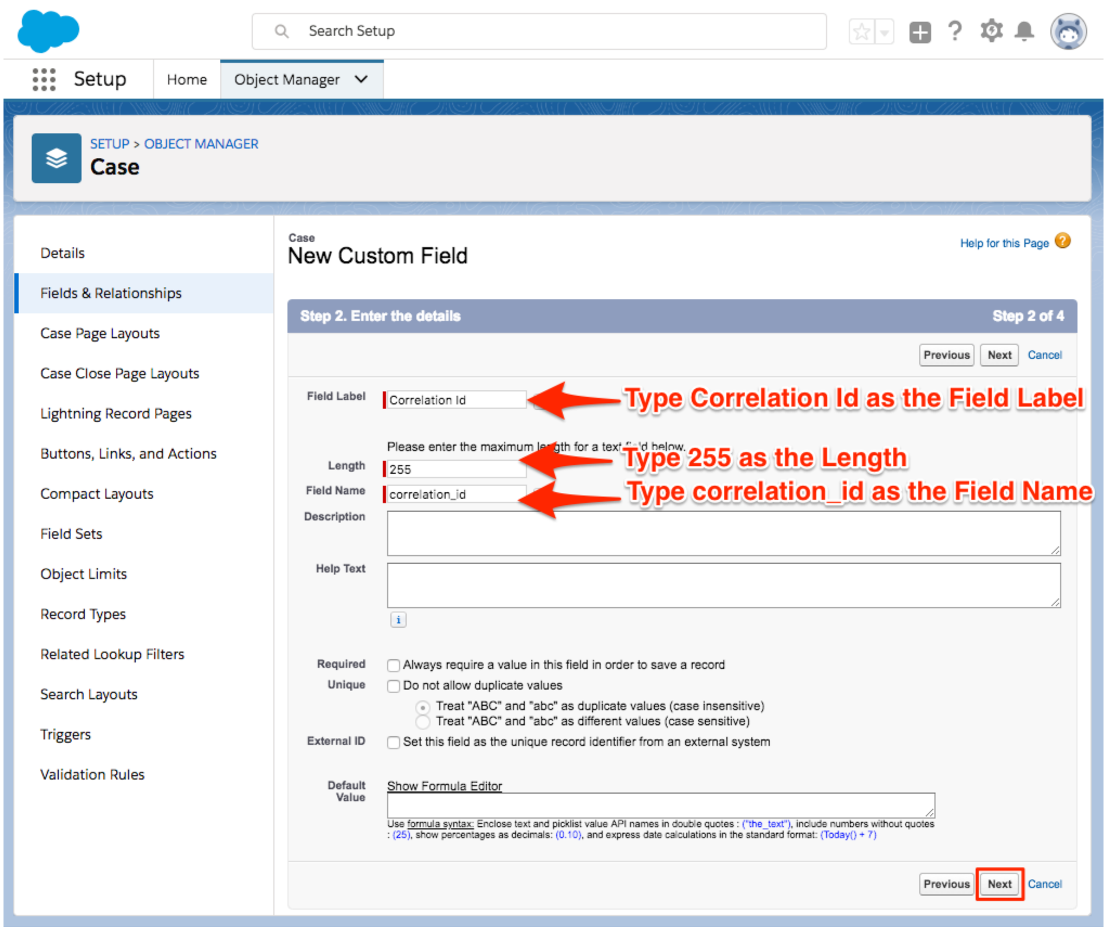
1. Log into your Salesforce organization and click the ⚙ icon in the top right-hand corner of the screen. Then, click **Setup**.

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**.



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

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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 Perspectium Replicator as a Salesforce connected app
- SalesInsight for ServiceNow incidents and Salesforce cases
- Install the Perspectium Package for Salesforce
- Configure Salesforce remote site settings
- Configure Perspectium properties for Salesforce

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