

How to Add Custom Fields at the Project and Task Level

DreamTeam allows you to add a custom field at both the Project and Task Level.

(Note: You must be a Salesforce Administrator to create custom fields.)

Adding Custom Fields on the Project Level

Step 1: Click on the Setup button on the top of the screen

Step 2: Click Create under the App Set up menu on the left hand side of the screen

Step 3: Click on the DreamTeam Projects Custom Object

Step 4: Under the Custom Fields & Relationships section and click the New button

Custom Object Definition Detail

Singular Label	DreamTeam Project	Description	
Plural Label	DreamTeam Projects	Enable Reports	<input checked="" type="checkbox"/>
Object Name	BLND_DFACT_Project__c	Track Activities	<input type="checkbox"/>
API Name	BLND_DFACT_Project__c	Track Field History	<input type="checkbox"/>
		Deployment Status	Deployed
		Help Settings	Standard Salesforce from Help Window
Created By	Adam Buxbaum, 11/2/2010 7:01 AM	Modified By	Adam Buxbaum, 8/5/2011 15:27 AM

Standard Fields

Action	Field Label	Field Name	Data Type	Controlling Field
	Created By	CreateBy	Lookup(User)	
	Last Modified By	LastModifiedBy	Lookup(User)	
Edit	Owner	Owner	Lookup(User+Queue)	
Edit	ObjectName	Name	Text(80)	

Custom Fields & Relationships

Action	Field Label	API Name	Data Type	Controlling Field	Modified By
Edit Del	Account Link	BLND_Account_Link__c	Lookup(Account)		Adam Buxbaum 2/25/2011 8:52 AM
Edit Del	Archive	BLND_Archive__c	Checkbox		Adam Buxbaum 7/25/2011 7:15 AM
Edit Del Replace	Business Unit	BLND_Business_Unit__c	Picklist		Adam Buxbaum 7/5/2011 2:22 AM
Edit Del	Close Link	BLND_Close_Link__c	Lookup(Task)		Adam Buxbaum 1/26/2011 11:50

Step 5: Once you have clicked the new button, select the field type and then click Next.

Step 1. Choose the field type

Specify the type of information that the custom field will contain.

Data Type

Basic Selected Select one of the data types below.

Auto Number A system-generated sequence number field uses a display format you define. The number is automatically incremented for each new record.

Formula A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

Roll-Up Summary A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

Step 6: On the next page, give the field a name in the Field Label box. Then in the Field Name box, make sure to add the following prefix to every custom field. BLND_. **Note:** If you forget to add this prefix, you will get an error message. Click next when done.

DreamTeam Project Help for this Page

New Custom Field

Step 2. Enter the details **Step 2 of 4**

Field Label:

Please enter the list of values for the picklist field below. Each value should be separated by a new line.

Sort values alphabetically, not in the order entered. Values will be displayed alphabetically everywhere.

Use first value as default value

Field Name:

Description:

Help Text:

Step 7: Next, establish the Field Level Security for each profile. Click next to proceed.

DreamTeam Project Help for this Page

New Custom Field

Step 3. Establish field-level security **Step 3 of 4**

Field Label: TestPicklist
Data Type: Picklist
Field Name: BLND_Test_Picklist
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 type="checkbox"/> Visible	<input type="checkbox"/> Read-Only
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
DT User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Force.com - Free User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Marketing User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Partner User	<input type="checkbox"/>	<input type="checkbox"/>
Read Only	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Solution Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Standard Platform User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Standard User	<input type="checkbox"/>	<input type="checkbox"/>

Step 8: Click the save button to add the custom field to the DreamTeam Project page layout.

DreamTeam Project
New Custom Field

Help for this Page

Step 4. Add to page layouts Step 4 of 4

Previous Save & New Save Cancel

Field Label TestPicklist
Data Type Picklist
Field Name ELND_Test_Picklist
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 checked="" type="checkbox"/> Add Field	Page Layout Name
<input checked="" type="checkbox"/>	DreamTeamProject Layout

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

Previous Save & New Save Cancel

Step 9: Once you have added your custom field to the DreamTeam Projects Custom Object click on the Project Manager Tab and reload DreamTeam.

Step 10: Click on the Project Menu and select Project Properties

Step 11: Click on the note pad icon on top of the Project Description box and the Edit Additional Fields sandbox will appear displaying all of the Custom Fields on the DreamTeam Projects Custom Object. All of these fields can be used when building a custom Salesforce report.

Project Properties

Name: Website_Implementation
Start Date: 01/15/2011 0:00 AM
Finish Date: 11/30/2011 9:40 AM
Project Description:

Edit Additional Fields

Fields in the Project

- Business Unit
- Case Link
- Created By ID
- Created Date
- Deleted
- Document Link
- CI R Category
- Expense Link
- Last Modified By ID
- Last Modified Date
- Location
- Owner ID
- Project Budget
- Project Expense
- Project Margin

Edit Picklist

Field label Business Unit

--None--

Save

OK Cancel

Adding Custom Fields at the Task Level

Step 1: Click on the Setup button on the top of the screen

Step 2: Click Create under the App Setup menu on the left hand side of the screen

Step 3: Click on the DreamTeam Tasks Custom Object

Step 4: Under the Custom Fields & Relationships section and click the New button

Custom Object
DreamTeam Task

Standard Fields | Custom Fields & Relationships | Validation Rules | Page Layouts | Field Sets | Search Layouts | Standard Buttons and Links | Custom Buttons and Links | Record Types | Apex Sharing Reasons | Apex Sharing Recalculator

Custom Object Definition Detail [edit] [Delete]

Singular Label	DreamTeam Task	Description	
Plural Label	DreamTeam Tasks	Enable Reports	<input checked="" type="checkbox"/>
Object Name	BLND_DFDT_Task	Track Activities	<input type="checkbox"/>
API Name	BLND_DFDT_Task__c	Track Field History	<input type="checkbox"/>
		Deployment Status	Deployed
		Help Settings	Standard Salesforce.com Help Window
Created By	Adam Buxbaum, 11/2/2010 7:01 AM	Modified By	Adam Buxbaum, 6/26/2011 5:33 AM

Standard Fields [Standard Fields Help]

Action	Field Label	Field Name	Data Type	Controlling Field
	Created By	CreatecBy	Lookup(User)	
	Last Modified By	LastModifiedBy	Lookup(User)	
[edit]	Owner	Owner	Lookup(User,Subs)	
[edit]	Task Name	Name	Text(80)	

Custom Fields & Relationships [New] [Field Dependencies] [Custom Fields & Relationships Help]

Action	Field Label	API Name	Data Type	Controlling Field	Modified By
[edit] [Del]	Approval	BLND_Approval__c	Long Text Area(32000)		Adam Buxbaum, 11/2/2010 7:07 AM
[edit] [Del]	Archive	BLND_Archive__c	Checkbox		Adam Buxbaum, 11/2/2010 7:07 AM

Step 5: Once you have clicked the new button, select the field type and then click Next.

Dream Team Project
New Custom Field

Step 1

Specify the type of information that the custom field will contain.

Data Type

None Selected Select one of the data types below.

Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

Formula A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

Roll-Up Summary A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

[Next] [Cancel]

Step 6: On the next page, give the field a name in the Field Label box. Then in the Field Name box, make sure to add the following prefix to every custom field. BLND_. **Note:** If you forget to add this prefix, you will get an error message. Click next when done.

DreamTeam Project Help for this Page

New Custom Field

Step 2. Enter the details **Step 2 of 4**

Previous **Next** Cancel

Field Label:

Please enter the list of values for the picklist field below. Each value should be separated by a new line.

A
B
C
D
E

Sort values alphabetically, not in the order entered. Values will be displayed alphabetically everywhere.

Use first value as default value

Field Name:

Description:

Help Text:

Step 7: Next, establish the Field Level Security for each profile. Click next to proceed.

DreamTeam Project Help for this Page

New Custom Field

Step 3. Establish field-level security **Step 3 of 4**

Previous **Next** Cancel

Field Label: TestPicklist
 Data Type: Picklist
 Field Name: BLND_Test_Picklist
 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 type="checkbox"/> Visible	<input type="checkbox"/> Read-Only
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
DT User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Force.com - Free User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Marketing User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Partner User	<input type="checkbox"/>	<input type="checkbox"/>
Read Only	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Solution Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Standard Platform User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Standard User	<input type="checkbox"/>	<input type="checkbox"/>

Step 8: Click the save button to add the custom field to the DreamTeam Task page layout.

DreamTeam Project
New Custom Field Help for this Page

Step 4. Add to page layouts Step 4 of 4

Previous Save & New **Save** Cancel

Field Label TestPicklist
Data Type Picklist
Field Name ELND_Test_Picklist
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 checked="" type="checkbox"/> Add Field	Page Layout Name
<input checked="" type="checkbox"/>	DreamTeamProject Layout

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

Previous Save & New **Save** Cancel

Step 9: Once you have added your custom field to the DreamTeam Task Custom Object click on the Project Manager Tab and reload DreamTeam.

Step 10: Double click on a task and open the Task Properties

Step 11: Click on the note pad icon on top of the Task Description box and the Edit Additional Fields sandbox will appear displaying all of the Custom Fields on the DreamTeam Task Custom Object. All of these fields can be used when building a custom Salesforce report.

Task Properties: Index 5

Type: Standard Task Name: Mockup Testing

Task Description:

Resources: Adam Buxbaum

Discussion Issues

Edit Additional Fields

Fields in the Task

- Case Link
- Created By ID
- Created Date
- Date of ePrescribing
- Date of Quality Reporting
- Deleted
- Documentation of Go-Live Date
- Expense
- Folder Link
- Go-Live
- Go-Live Owner
- Last Modified By ID
- Last Modified Date
- Owner ID
- Priority Level

Edit Reference

Field label: Case Link

Search

(use asterisk for wildcard, ? for any char, or word All)

00001003

None Save

OK Cancel