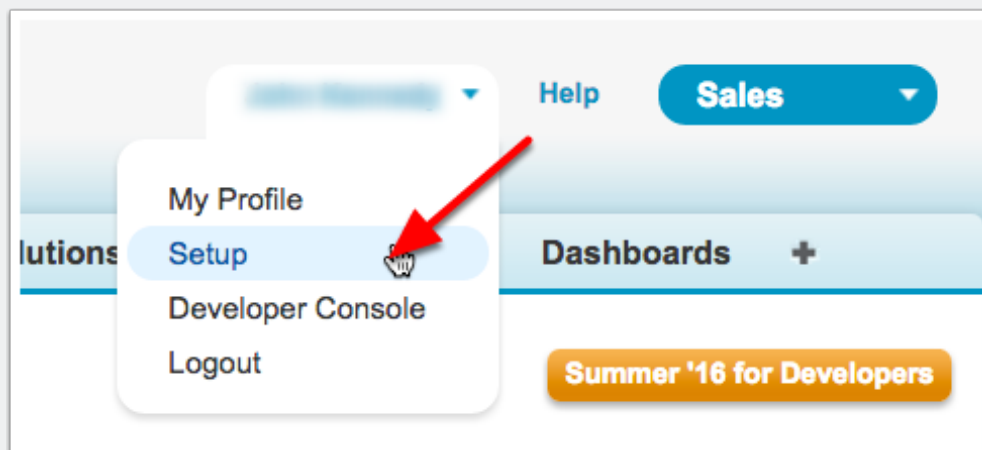


Create the Amity Sync account formula field

This article demonstrates how to create the Amity Sync account formula field in Salesforce.

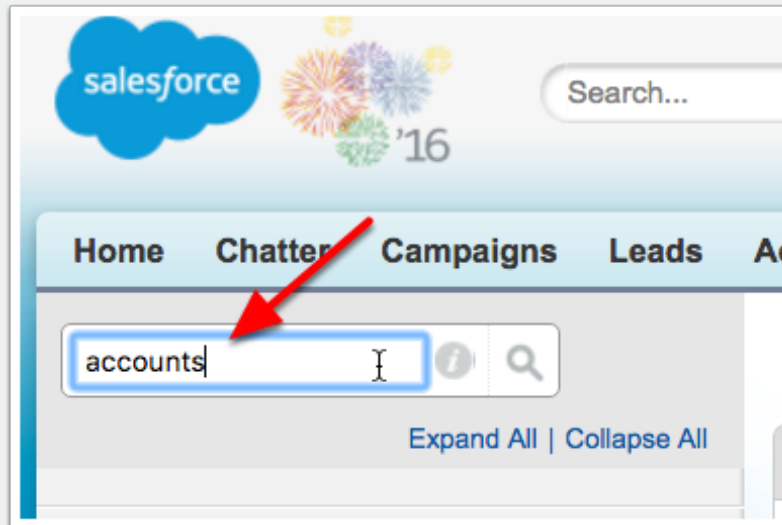
1. Login into Salesforce

2. Click Setup from the user menu.

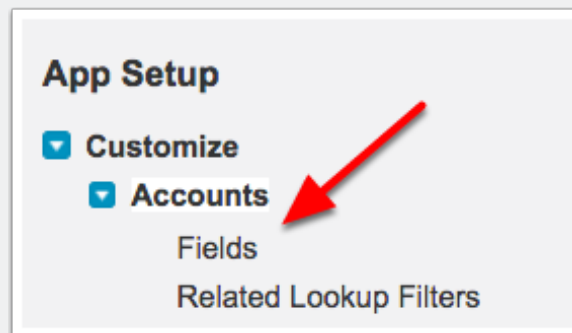


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3. Type "accounts" in Quick Find field

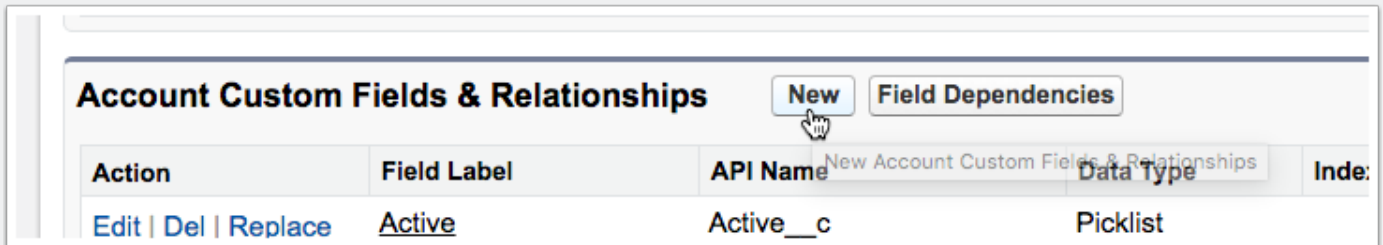


4. Click the Fields link in App Setup > Customize > Accounts



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5. Click the New button in the Account Custom Fields & Relationships panel



6. Choose the field type in Step 1

1. Click the **Formula** data type.
2. Click the **Next** button.

The screenshot shows the 'Step 1. Choose the field type' dialog box. At the top right, there are 'Next' and 'Cancel' buttons. Below the buttons, there is a text prompt: 'Specify the type of information that the custom field will contain.' To the right of this prompt is a red circle with the number '2'. Below the prompt is a section titled 'Data Type' with the following options:

- 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 **1**: 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.

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7. Complete the form in Step 2.

1. Set the Field Label to **Amity Sync**.
2. Set the the Return Type to **Checkbox**.
3. The Field Name value should be populate automatically. Ensure the value is **Amity_Sync**.
4. Click the **Next** button.

Step 2. Choose output type Step 2 of 5

Previous Next Cancel

Field Label | Amity Sync 1 3 Field Name | Amity_Sync 4

Formula Return Type

None Selected Select one of the data types below.

Checkbox 2

Currency

Date

Date/Time

Number

Percent

Text

Calculate a boolean value
Example: `TODAY() > CloseDate`

Calculate a dollar or other currency amount and automatically format the field as a currency amount.
Example: `Gross Margin = Amount - Cost_c`

Calculate a date, for example, by adding or subtracting days to other dates.
Example: `Reminder Date = CloseDate - 7`

Calculate a date/time, for example, by adding a number of hours or days to another date/time.
Example: `Next = NOW() + 1`

Calculate a numeric value.
Example: `Fahrenheit = 1.8 * Celsius_c + 32`

Calculate a percent and automatically add the percent sign to the number.
Example: `Discount = (Amount - Discounted_Amount_c) / Amount`

Create a text string, for example, by concatenating other text fields.
Example: `Full Name = LastName & ", " & FirstName`

Previous Next Cancel

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8. Enter the formula in Step 3.

1. Select **Advanced Formula**.
2. To set the checkbox when the Type field is set to "Customer" enter this formula:
IF(ISPICKVAL(Type, 'Customer'), TRUE, FALSE)
3. Click '**Check Syntax**'.

The screenshot shows the Salesforce formula editor interface. At the top, there are two tabs: 'Simple Formula' and 'Advanced Formula', with a red circle '1' next to 'Advanced Formula'. Below the tabs are two buttons: 'Insert Field' and 'Insert Operator'. The main area contains the text 'Amity Sync (Checkbox) =' followed by the formula 'IF(ISPICKVAL(Type, 'Customer'), TRUE, FALSE)'. A red circle '2' is placed at the beginning of the formula. At the bottom left, there is a 'Check Syntax' button with a red circle '3' next to it. To the right of the button, a green message reads: 'No syntax errors in merge fields or functions. (Compiled size: 91 characters)'.

9. Look for the green 'No syntax errors'.

This will give you guidance, e.g. missing brackets.

When you have no syntax errors, click the '**Next**' button.

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10. Click the 'Next' button in Step 4.

11. Click the Save button in Step 5.



Step 5. Add to page layouts Step 5 of 5

Field Label	Amity Sync
Data Type	Formula