I want to populate a regional data field based on my country entry, can I do this?

This guide will cover:

✓ Creating a custom field on the AddressTools Country object

✓ Creating custom fields on standard objects

✓ Auto populating a field based on an objects Country entry

Note: Functionality for populating regional data based on a country entry is only available for AddressTools Premium, if you are using AddressTools Free then you can trial our AddressTools Premium application to take advantage of this feature plus many more that it includes.
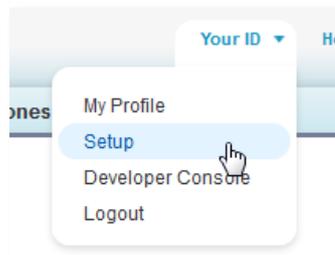
View our AppExchange listing for AddressTools Premium here: www.tiny.cc/addresstools

We will be showing an example of creating a "Sales Territory" field on the lead object, this field will automatically populate with the correct sales territory depending on the value of the Country field. This processes is divided into 3 main steps, ensure that you complete all stages to correctly setup the feature, furthermore you can use this as a guide to setup a different Lookup Relationship field.
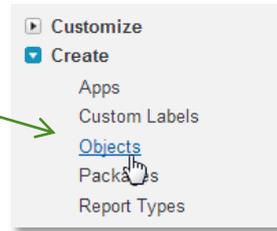
Creating a custom field on the AddressTools Country object

The first step is to create a custom text field on the AddressTools Country object; this field will be used by the formula to obtain the value which will then be outputted to a text box within the object. The following steps will explain how to do this.

1. Visit the Salesforce *Setup* page, by selecting it from the pick-list underneath your Salesforce ID.

1. Navigate to the *App Setup* section and expand *Create* then select *Objects.*

2. Within the *Custom Objects* section select *Country*. Next navigate to the *Custom Fields and relationships* section and select *New.*

3. From the list of options select *Text* to create a standard text field, and then on the next page enter the following information.
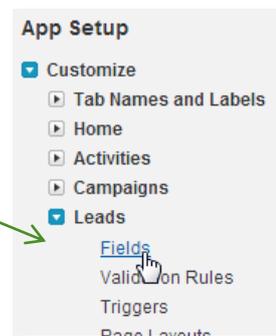
Then select *Save* to save the new custom object
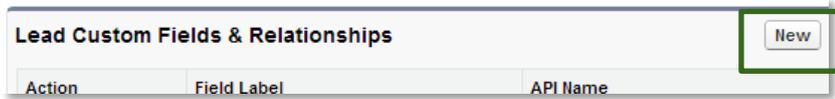
Creating custom fields on standard objects

You will now need to create two additional fields on the object that you would like you data to appear, we will be showing an example on the leads object.

The first field is going to be a lookup field which can be completed by following the steps below:

1. Within the Salesforce setup navigate to *App Setup* > *Customise* then select the object that you wish to use (we are showing leads) and finally select *Fields*.

2. Next locate the *Custom Fields & Relationships* section on the fields page and select *New.*

3. From the list of check boxes select *Lookup Relationship*, then advance to the next page and select *Country* for the object that the lookup relationship is related to.

4. On the next stage name the field label as *Lead Country Lookup* as the example to the right shows, then select *Next*.

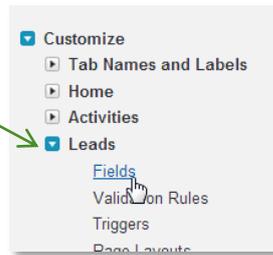   Choose the profiles that you wish to make the field visible to and continue to the next step.

5. Ensure the check box is not selected so that the field is not added to the objects page layout, then select *Next*.
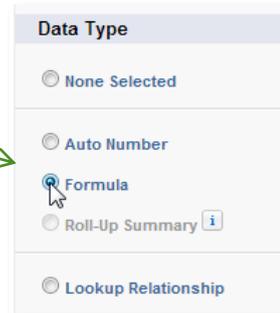

6. On the *Related Lists* page leave all the values as defaults and save.

You will now have created a lookup field, now we will create a formula field that will set the "Sales Territory" field to the correct value depending on the Country name.

7. Within the Salesforce Setup page locate the **App Setup** section and select **Customize** > **Leads** > **Fields.**
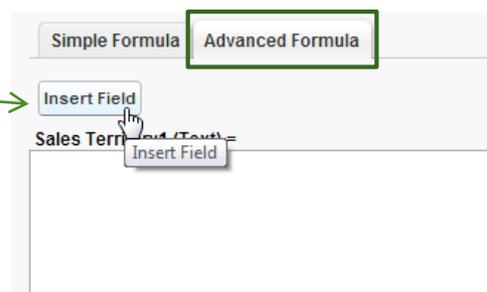
8. Navigate to the **Custom Fields & Relationships** section and select **New**. Choose the **Formula** field type and continue to the next step.
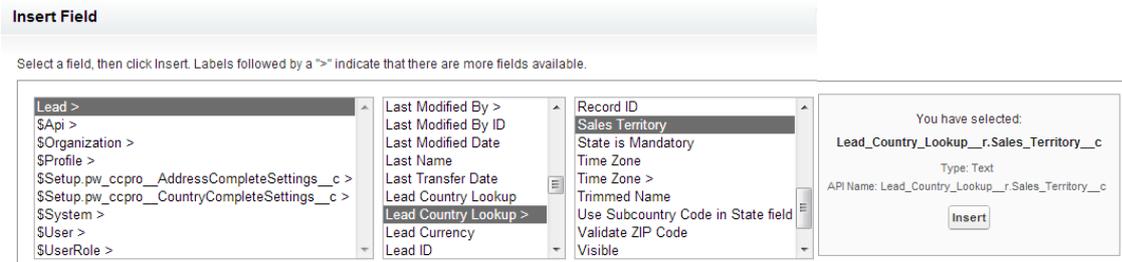
9. The field label needs to be the same value as the field that you created in the first section.

10. Choose "Text" as the return type and then select **Next** to progress to the next stage.

11. On the formula page select **Advanced Formula** and then **Insert Field.**

12. You will then need to select the field you wish to use, the below example shows the "Sales Territory" field being selected from the *Lead* and then *Lead Country Lookup* fields. Depending on the object and field that you are using select the appropriate links.
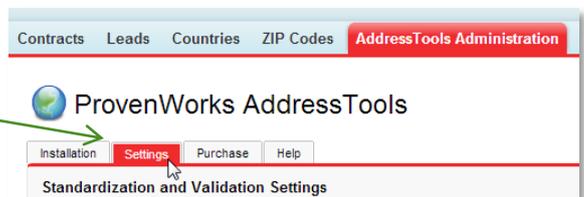

13. Once you have added the formula continue to the next page and select the profiles that you wish the field to be visible for. Next ensure that the field is added to the selected page layout and save.

Auto populating a field based on an objects Country entry

For the field to auto-populate with the correct data, the new Lookup field must be associated to the standard country field. Follow the steps below to complete this:

1. Navigate to the *ProvenWorks Data Tools* page, and then within the *AddressTools Administration* section select the *Settings* tab.

2. Locate the *Fields to Validate / Standardize* section select *Edit* next to the *Lead* entry.

3. Use the pick-list to modify the value of *Country Lookup* to your created lookup (Lead_Country_Lookup_c).

Select *Apply* and ensure to *Save All* within the *Fields to Validate / Standardize* section.

Now all Leads saved with "United States" in the country field will also display "North America" in the Sales Territory field. Changing the country on any lead will automatically update the Sales Territory field to whatever value is stored within the countries data.

Using this tutorial as a guide you can now create country and state based formula fields for time zones, languages, state sales territories, or anything else you wish!

Contact Us

If the lookup fields are still not working for you, please check out our other troubleshooting guides as these may provide the answer.

Alternatively contact us at: support@provenworks.com

We will be happy to answer and questions or problems that you may have.