

17.8 Standard Picklist Editor

It allows you to modify the content of Picklists, adding or modifying the values present, and assigning different views by role (i.e.: two users of different roles see different values of the same picklist).

The screenshot shows the 'Settings > Picklist editor' interface. At the top, there is a breadcrumb 'Settings > Picklist editor' and a subtitle 'Customize Picklist values in each module'. Below this, there are two dropdown menus: 'Select Module' (set to 'Quotes') and 'Select the Picklist' (set to 'Quote Stage'). To the right of these are three buttons: 'Add', 'Edit', and 'Delete'. Below the dropdowns, there is a section 'Picklists Available in Quotes For' with a dropdown set to 'Manager'. A red asterisked note states '* All accessible values for the role are shown below'. The main area contains two columns: 'Quote Stage' and 'Carrier'. Each column has an 'Assign' button and a list of values. The 'Quote Stage' list includes 'Created', 'Delivered', 'Reviewed', 'Accepted', and 'Rejected'. The 'Carrier' list includes 'FedEx', 'UPS', 'USPS', 'DHL', and 'BlueDart'.

1. select module
2. choose the picklist field
3. add values to the picklist. If the picklist is not a mandatory field, it is recommended to enter a first item which is neutral such as - select - to remind users to enter the drop-down menu and to prevent the first value entered being taken by default
4. edit picklist values
5. delete picklist values
6. use the "Assign" button to enable other roles to view a picklist value or to change the sorting of entries.

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Add picklist values - Quote Stage

Existing picklist values	Add new entries here
<div style="border: 1px solid black; height: 100px;"></div>	<div style="border: 1px solid black; height: 100px;"></div>
Non-editable values : <ul style="list-style-type: none">CreatedDeliveredReviewedAcceptedRejected	Select roles <div style="border: 1px solid black; padding: 2px;">Manager Agent</div>
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

Warning! Some Picklist contents cannot be changed/deleted as they are set by default. Picklists are accessible from the Module Manager.

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