

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' page. At the top, it says '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' (highlighted in red). Below the dropdowns, it says 'Picklists Available in Quotes For' followed by a 'Manager' dropdown. A red asterisk note states: '* All accessible values for the role are shown below'. The main area contains two columns. The left column is titled 'Quote Stage' and lists: Created, Delivered, Reviewed, Accepted, and Rejected. To its right is an 'Assign' button. The right column is titled 'Carrier' and lists: FedEx, UPS, USPS, DHL, and BlueDart. To its right is another 'Assign' button.

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.

Add picklist values - Quote Stage

Existing picklist values

Non-editable values :

Created
Delivered
Reviewed
Accepted
Rejected

Add new entries here

Select roles

Manager
Agent

Save

Cancel

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