

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 three dropdown menus: 'Select Module' (set to 'Quotes'), 'Select the Picklist' (set to 'Quote Stage'), and 'Picklists Available in Quotes For' (set to 'Admin'). To the right of these dropdowns are three buttons: 'Add', 'Edit', and 'Delete'. Below the dropdowns, there is a red asterisk warning: '* All accessible values for the role are shown below'. Underneath, there is a section titled 'Quote Stage' with a list of values: 'Created', 'Delivered', 'Reviewed', 'Accepted', and 'Rejected'. To the right of this list is an '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

Add new entries here

Non-editable values :

Created

Delivered

Reviewed

Accepted

Rejected

Select roles

Admin

Agent

Manager

Save

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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