

Dynamic Picklist (v2)

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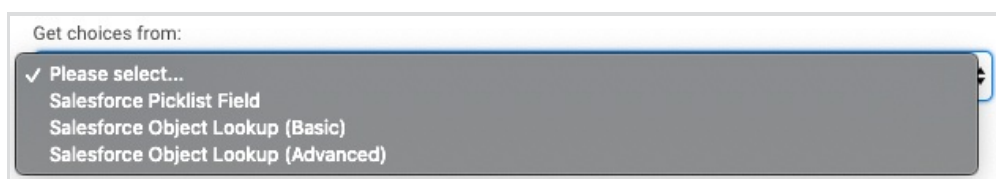
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Overview

Dynamic Picklists are multiple-choice questions that get their list of choices directly from Salesforce. Values are populated from Salesforce when the field is clicked by a respondent (unless there is a configured prefilled or default value), so the choices in your picklist always stay current without having to refresh the schema.

Note: If there is a prefilled or default value configured for a Dynamic Picklist, the values are populated from Salesforce at the initial form load.



You can configure your Dynamic Picklists to get their list of choices from:

1. Salesforce Picklist Field
2. Salesforce Object Lookup (Basic)
3. Salesforce Object Lookup (Advanced)

Note:

- When cloning a form with a Dynamic Picklist, you will need to reconfigure the Dynamic Picklist on the clone. The field will clone over but the configuration will not.

- Additionally, we recommend that you do not copy the configured Dynamic Picklist field within a form, and add a Dynamic Picklist field to predefined content or a template.
- Currently, Dynamic Picklists do **not** work in conjunction with the [No Overwrite](#) feature.
- Finally, Dynamic Picklist fields are linked to the authenticated Salesforce user. If you change form ownership or change the authenticated user for your Dynamic Picklists, this will break the Dynamic Picklist field and you will need to re-authenticate.

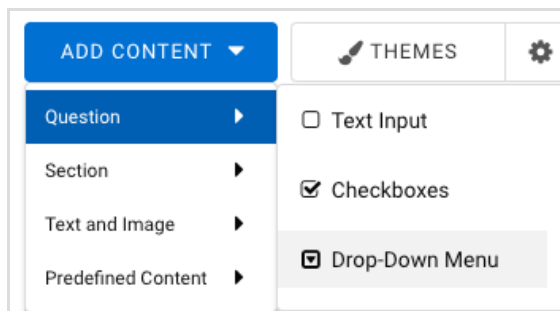
Requirements

To use Dynamic Picklists, you will need:

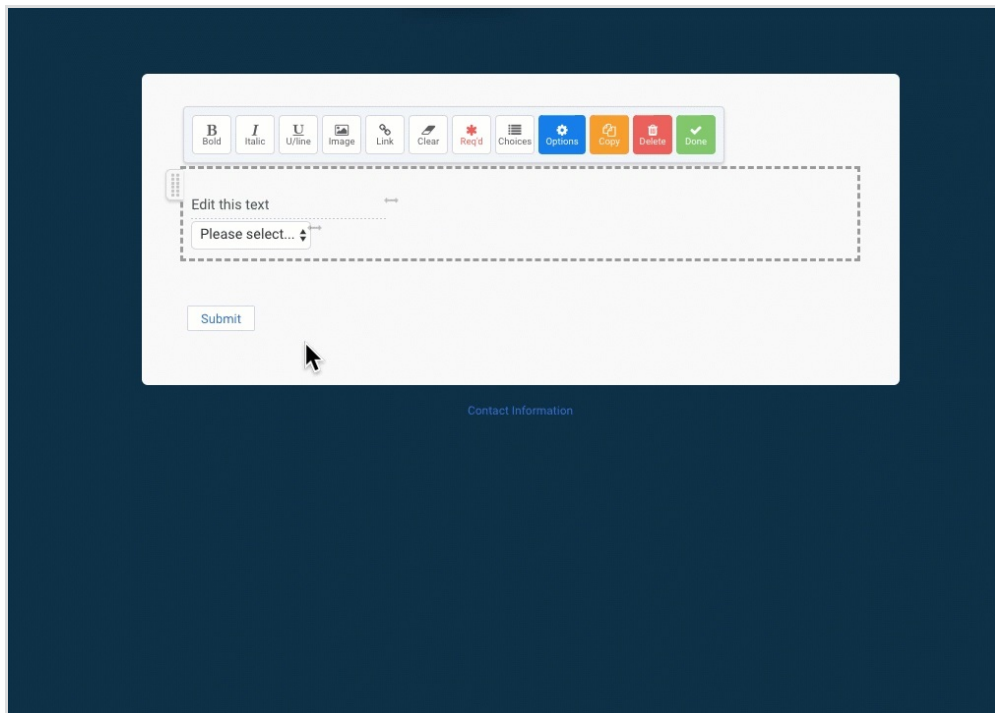
- Access to a Salesforce instance
- A FormAssembly Essentials plan or above
- Permission to use the Dynamic Picklist feature (controlled by your FormAssembly administrator)

Note: This permission is not set by default on new accounts so you may need to edit your permissions.

Set Up a New Dynamic Picklist



1. Add a Drop-Down Menu field to your form
2. Click on the field and choose Choices
3. Click Salesforce Dynamic Picklist
4. Select your existing authorization or connect to a new account.
 - **Note:** A new token is generated each time you select "Connect to Salesforce" and log into Salesforce, so please use existing authentications if they're available to preserve your limited tokens.



5. Click Next
6. Select your Choices source by clicking on the Get choices from the dropdown box
 - Salesforce Picklist Field
 - Salesforce Object Lookup (Basic)
 - Salesforce Object Lookup (Advanced)

This information can be Salesforce records for that object, or a particular picklist included on the object.

Return Two Or More Salesforce Fields

If you would like to return two fields or more from Salesforce, make sure that you have added additional text input fields to your form **in advance**. For example, if you would like to return a picklist of Account Names and have a second field filled with the related Account ID then you'll need to have your Dynamic Picklist field added to the form along with a text input field for the Account ID to pull into before you begin mapping.

Update a Dynamic Picklist v1 Field

If you have an existing field in your form that was set up using our previous version of Dynamic Picklists, here are a few things to note:

1. The only action needed to switch from the older version of the feature to the newer version is to enter into the Form Builder.
2. Existing Dynamic Picklist fields will continue to work as expected and all of your existing Prefill settings will

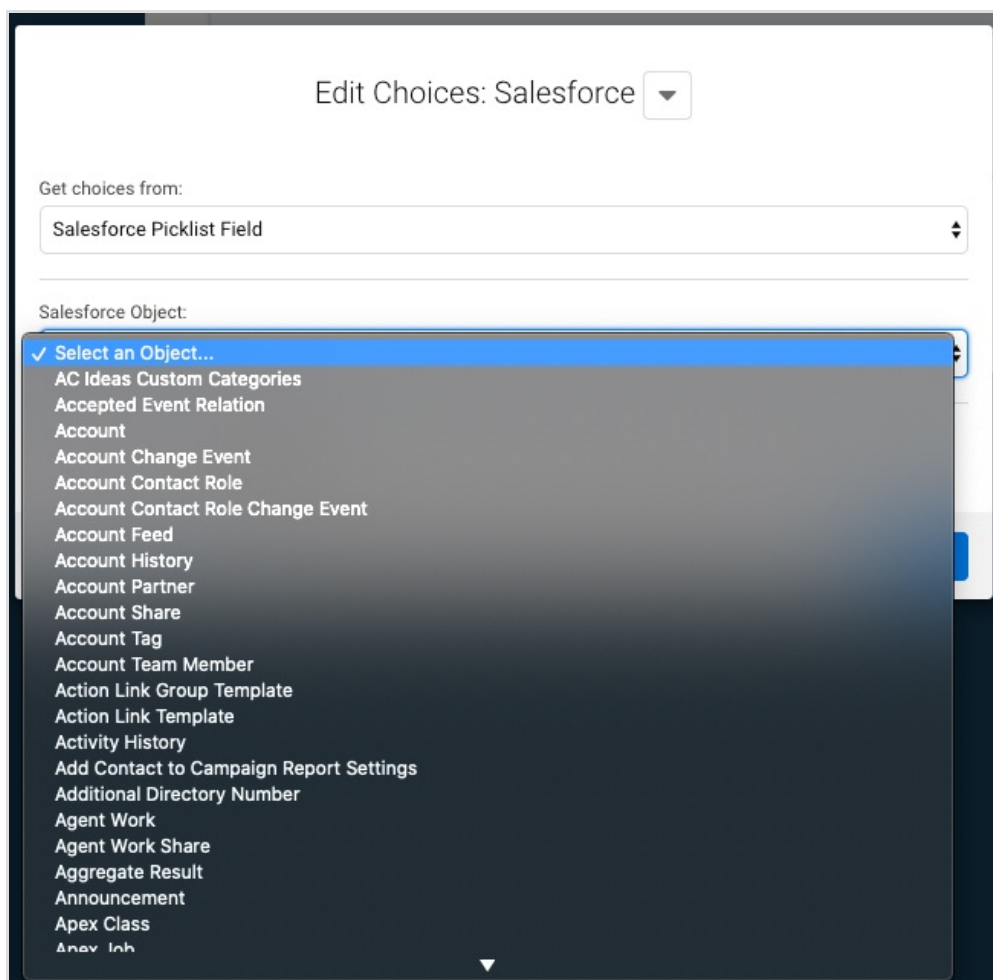
migrate over.

3. When you edit a field that was set up in Dynamic Picklist v1, you will see a new interface and can adjust your settings as needed.

Note: While we worked hard to consider as many Dynamic Picklist setups as we could, every customer is unique and there is a chance that the migration process we created to streamline the feature integration did not account for your custom setup. Thus, we highly recommend reviewing any live forms using the Dynamic Picklists feature to confirm the fields are working as expected.

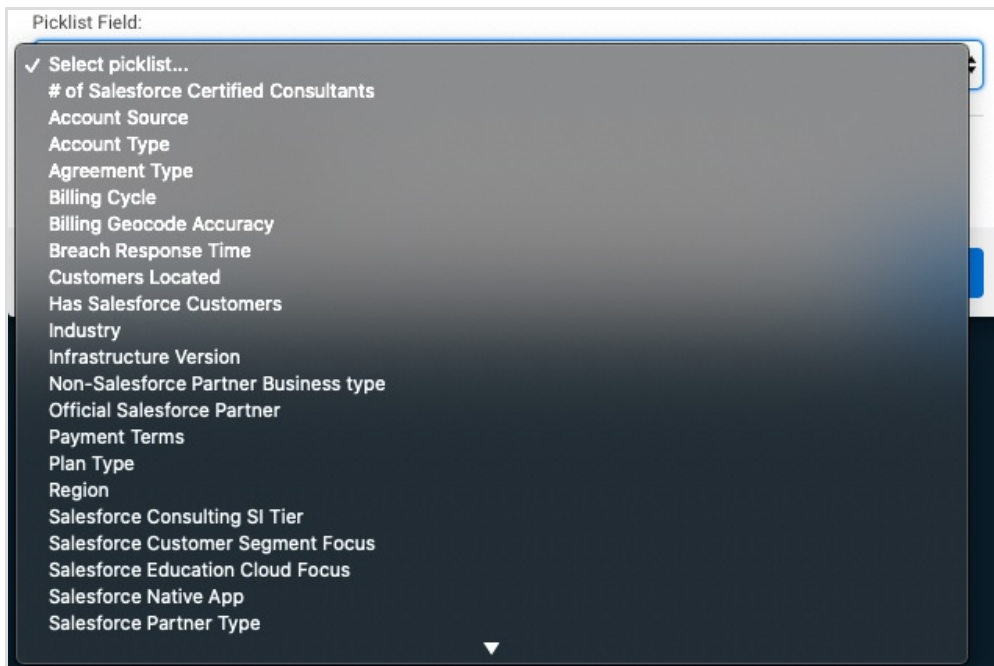
Salesforce Picklist Field

1. Choose Salesforce Picklist Field from the **Get choices from** dropdown



The screenshot shows the 'Edit Choices: Salesforce' configuration page. At the top, there is a title 'Edit Choices: Salesforce' with a dropdown arrow. Below this, the 'Get choices from:' section has a dropdown menu currently set to 'Salesforce Picklist Field'. Underneath, the 'Salesforce Object:' section has a dropdown menu that is open, displaying a list of Salesforce objects. The first item, 'Select an Object...', is highlighted with a blue checkmark. The list includes various objects such as 'AC Ideas Custom Categories', 'Accepted Event Relation', 'Account', 'Account Change Event', 'Account Contact Role', 'Account Contact Role Change Event', 'Account Feed', 'Account History', 'Account Partner', 'Account Share', 'Account Tag', 'Account Team Member', 'Action Link Group Template', 'Action Link Template', 'Activity History', 'Add Contact to Campaign Report Settings', 'Additional Directory Number', 'Agent Work', 'Agent Work Share', 'Aggregate Result', 'Announcement', 'Apex Class', and 'Apex Job'.

2. Choose your field from the **Picklist Field** dropdown



3. Choose to Enable or Disable the Allow Free Responses toggle
 - If you'd like to allow respondents to enter information into your Dynamic Picklist, select Enable.
4. Choose to Enable or Disable the Refresh Salesforce Connection toggle
 - Enabling this toggle will allow the Salesforce connection to refresh (thereby clearing the cache) to ensure that previously selected values in a dropdown do not display again when the form is loaded at a later time.

Allow Free Responses	<input type="checkbox"/> Disabled
Refresh Salesforce Connection	<input type="checkbox"/> Disabled

4. Click Next
5. You'll now see a preview of the data retrieved in your Dynamic Picklist

Edit Choices: Salesforce ▼

Preview your dataset here and map additional columns to other form fields. [Learn more.](#)
 ⚠ Data in datasets should be **public data only**.

DATASET PREVIEW 52 rows, 2 columns

COLUMN A	COLUMN B
Apparel	Apparel
Automotive	Automotive
Biotechnology	Biotechnology
Chemicals	Chemicals
Communications	Communications
Construction	Construction
Consulting	Consulting
Electronics	Electronics
Energy	Energy
Engineering	Engineering

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← Edit Configuration
Cancel
OK

6. Click OK to save your Dynamic Picklist
7. Save your form

Salesforce Object Lookup (Basic)

Allow Free Responses ☐

Disabled

1. Choose Salesforce Object Lookup (Basic) from the Get choices from the dropdown box

Edit Choices: Salesforce ▼

Get choices from:

Salesforce Object Lookup (Basic) ▼

Lookup Salesforce Object:

- ✓ Select an Object...
- AC Ideas Custom Categories
- Accepted Event Relation
- Account
- Account Change Event
- Account Contact Role
- Account Contact Role Change Event
- Account Feed
- Account History
- Account Partner
- Account Share
- Account Tag
- Account Team Member
- Action Link Group Template
- Action Link Template
- Activity History
- Add Contact to Campaign Report Settings
- Additional Directory Number
- Agent Work
- Agent Work Share
- Aggregate Result
- Announcement
- Apex Class
- Apex Job

2. Choose your field(s) in the Return the following field(s) dropdown box

Picklist Field:

- ✓ Select picklist...
- # of Salesforce Certified Consultants
- Account Source
- Account Type
- Agreement Type
- Billing Cycle
- Billing Geocode Accuracy
- Breach Response Time
- Customers Located
- Has Salesforce Customers
- Industry
- Infrastructure Version
- Non-Salesforce Partner Business type
- Official Salesforce Partner
- Payment Terms
- Plan Type
- Region
- Salesforce Consulting SI Tier
- Salesforce Customer Segment Focus
- Salesforce Education Cloud Focus
- Salesforce Native App
- Salesforce Partner Type

3. Add conditions and sorting specifications if needed

When this condition is met:

Select field...

=

a text value

enter a value...

+ Add AND condition

+ Add OR condition

Sorted by:

Select field...

Ascending

4. Choose to Enable or Disable the Allow Free Responses toggle
 - If you'd like to allow respondents to enter information into your Dynamic Picklist, select Enable.
5. Choose to Enable or Disable the Refresh Salesforce Connection toggle
 - Enabling this toggle will allow the Salesforce connection to refresh (thereby clearing the cache) to ensure that previously selected values in a dropdown do not display again when the form is loaded at a later time.
6. Click Next
7. You'll now see a preview of the data retrieved in your Dynamic Picklist

Edit Choices: Salesforce

Preview your dataset here and map additional columns to other form fields. [Learn more.](#)

⚠ Data in datasets should be **public data** only.

DATASET PREVIEW 2000 rows, 1 columns

COLUMN A
0010L00001hXx7SQAS
0010L00001hXxybQAC
0010L00001hY9RLQA0
0010L00001hYJ0uQAG
0010L00001hYJT8QA0
0010L00001hYJTwQA0
0010L00001hYK0UQA4
0010L00001hYKjhQAG
0010L00001hYRIYQA4
0010L00001hYRzcQAG

Q Current Field

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Edit Configuration

Cancel

OK

8. Click OK to save your Dynamic Picklist
9. Save your form

Note: If your result will include more than 2,000 records, you must include a CONTAINS condition. This will ensure that as your respondent types, the Dynamic Picklist will refer back to Salesforce to find more records matching the parameters.

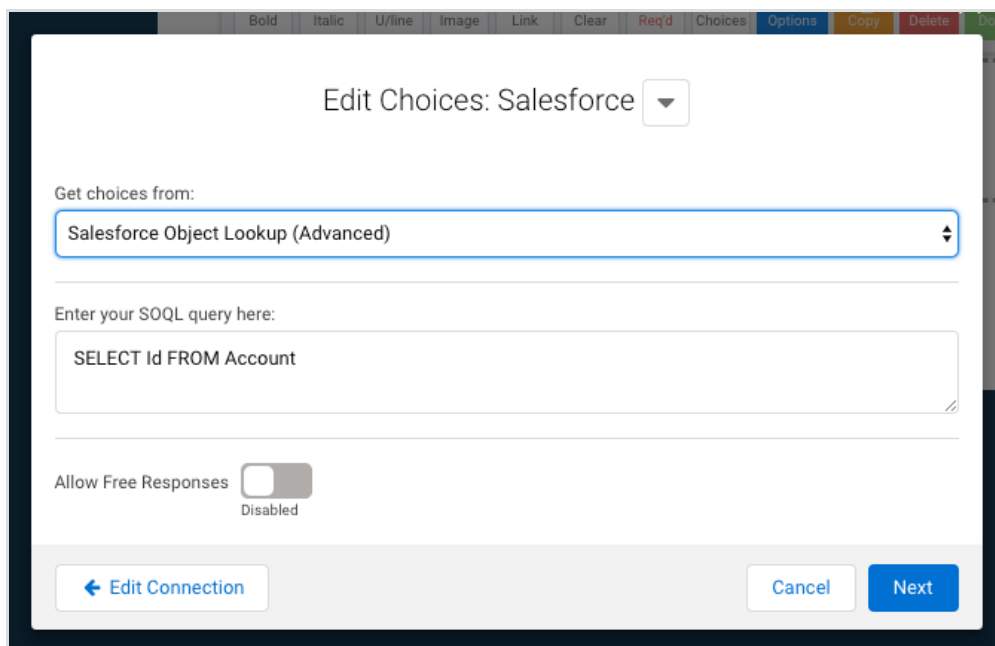
After the CONTAINS condition:

- Choose "A Text Value"
- Enter the [field alias](#) of your dynamic picklist **wrapped in %%**
 - For example: %%tfa_###%%
 - **Replace ### with the field alias number on your form**
- Click Next and then OK

Salesforce Object Lookup (Advanced)

Note: We are unable to provide support for the custom SOQL used in Advanced Lookups.

1. Choose Salesforce Object Lookup (Advanced) from the Get choices from the dropdown box



Edit Choices: Salesforce ▼

Get choices from:

Salesforce Object Lookup (Advanced) ▼

Enter your SOQL query here:

SELECT Id FROM Account

Allow Free Responses ☐ Disabled

← Edit Connection Cancel Next

- This is an advanced option that allows you to write a query to pull data into your Dynamic Picklist.
2. Choose to Enable or Disable the Allow Free Responses toggle
 - If you'd like to allow respondents to enter information into your Dynamic Picklist, select Enable.
 3. Choose to Enable or Disable the Refresh Salesforce Connection toggle
 - Enabling this toggle will allow the Salesforce connection to refresh (thereby clearing the cache) to ensure that previously selected values in a dropdown do not display again when the form is loaded at a later time.
 4. Click Next
 5. You'll now see a preview of the data retrieved in your Dynamic Picklist

Edit Choices: Salesforce

Preview your dataset here and map additional columns to other form fields. [Learn more.](#)

⚠ Data in datasets should be public data only.

DATASET PREVIEW2000 rows, 1 columns

COLUMN A
0010L00001hXx7SQAS
0010L00001hXybQAC
0010L00001hY9RLQA0
0010L00001hYJ0uQAG
0010L00001hYJT8QA0
0010L00001hYJTwQA0
0010L00001hYK0UQA4
0010L00001hYKjhQAG
0010L00001hYRIYQA4
0010L00001hYRzcQAG

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Edit Configuration

Cancel

OK

6. Click OK to save your Dynamic Picklist

7. Save your form.

Case Scenarios

Choices from Salesforce Object Lookup Results

- Angela is creating a form that will link new businesses to existing accounts. She already uses the standard Account object to store and manage account information in Salesforce. By using a Dynamic Picklist, she can create a field on her form that will show a choice for each record in her Salesforce instance. As she adds and removes records in Salesforce, the choices on her live form will automatically update.

Choices from Salesforce Picklist

- Amit uses lots of different forms to facilitate student registration. Each of his forms needs a field for the anticipated start term, but the list of available choices changes every semester. By using a dynamic picklist, Amit can populate the “Anticipated Start Term” field with a list of choices from his “Anticipated Start Term” picklist in Salesforce. When Amit updates his picklist in Salesforce, it will automatically update every one of his forms using that dynamic picklist.

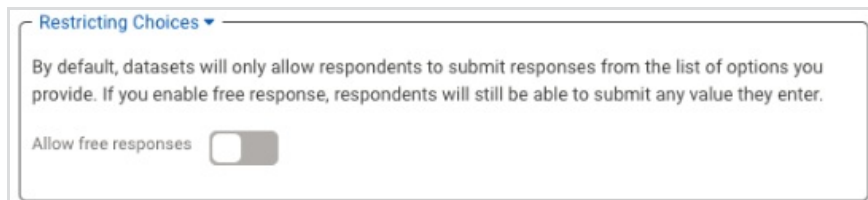
Dynamic Picklist Limits

- Dynamic Picklists **cannot** be used in conjunction with [conditional questions](#) or [menu dependencies](#).
- Dynamic Picklists **cannot** be conditioned on Checkboxes, Radio Buttons, Drop-Down Menu, or Multi-Select List fields at this time.
- For forms shared with the [Collaboration feature](#), only the creator of the Dynamic Picklist can edit the picklist configuration.
- Dynamic Picklists render in LIVE mode so they cannot be seen in offline mode when using the FormAssembly Mobile App.
- Dynamic Picklists do not currently have a limit on the number of values they will pull in.
- Dynamic Picklist fields that are populated by restricted picklist fields in Salesforce will not work correctly if:
 - the values are set via custom code
 - the value is a calculated value

Note:

- Prefilling over 2000 records may cause slower than normal loading times and affect form performance. We recommend adding additional criteria to narrow down prefill results or using more than one field to show your results.
- Additionally, we recommended a maximum of 50 Dynamic Picklists prefilled on a form.
- Please keep in mind that there is also a Salesforce API call limit that may impact your findings. For more information on your account-specific API call limits, please refer to [Salesforce](#).

- Dynamic Picklists now have the option of restricting values. You'll be able to toggle the switch to allow or not allow outside values from respondents.



The image shows a configuration box titled "Restricting Choices" with a dropdown arrow. Below the title, there is explanatory text: "By default, datasets will only allow respondents to submit responses from the list of options you provide. If you enable free response, respondents will still be able to submit any value they enter." At the bottom, there is a toggle switch labeled "Allow free responses". The switch is currently in the "off" position, indicated by a grey slider.

- In the dropdown list on the live form, you will see the first 100 results, until you define the query further by typing in a letter.
 - Example: Your list has 200 countries. When you look at the form, it will show the first 100 of the list. If you type in the letter 'A', it will show the first 100 items that start with 'A'.

Note: Dynamic Picklists **do not** work in conjunction with multi-select picklists in Salesforce at this time.