

Dynamic Picklist (v2)

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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 form loads, so the choices in your picklist always stay current without having to refresh the schema.

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)

Please 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, add a Dynamic Picklist field to predefined content or to 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 reauthenticate.

Requirements

To use Dynamic Picklists, you will need:

- 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](#).
- An Enterprise or Cloud Compliance plan
- Access to a Salesforce instance

[Learn more about user roles and 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. **Please 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 could be records for that object, or 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 fill 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.

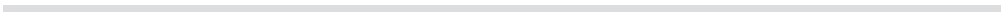


Update a Dynamic Picklist v1 Field

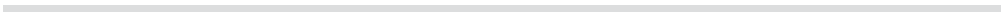
If you have an existing field in your form that was set up using our previous version of Dynamic Picklists, here are a few things to note:

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 setup 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 field for fields are working as expected.

Salesforce Picklist Field

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

2. Choose your field from the Picklist Field dropdown box

3. Enable or disable the Allow Free Responses toggle if you'd like to allow or not allow respondents to enter information in your Dynamic Picklist


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


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

Salesforce Object Lookup (Basic)

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

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

3. Add conditions and sorting specifications if needed

4. Enable or disable the Allow Free Responses toggle if you'd like to allow or not allow respondents to enter information not in your Dynamic Picklist

5. Click Next

6. You'll now see a preview of the data retrieved in your Dynamic Picklist

7. Click OK to save your Dynamic Picklist

8. 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, please choose "A Text Value" and enter the [field alias](#) of your dynamic picklist and click "Next" and then "OK".

Salesforce Object Lookup (Advanced)

Please 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 dropdown box

2. This is a more advanced option that allows you to write a query to pull data into your Dynamic Picklist.
 3. Enable or disable the Allow Free Responses toggle if you'd like to allow or not allow respondents to enter information not in your Dynamic Picklist
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4. Click Next
 5. You'll now see a preview of the data retrieved in your Dynamic Picklist.
-
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 business 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 on 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 is able to 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 it 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 potentially cause slower than normal loading times and affect form performance. We recommend adding additional criteria to narrow down prefill results or to use more than one field or fields to show your results.

Please keep in mind that there is also a Salesforce API call limit that will limit 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.
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- In the dropdown list on the live form, you will see the first 39 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 39 of the list. If you type in a letter, say A, it will show the first 39 items that start with A.
 - **Please note** that Dynamic Picklists **do not** work in conjunction with multi-select picklists in Salesforce at this time.

Video Tutorial

