Text Field Concatenation

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Concatenations pull data from properties (including the Location property and its address components) and fields to automatically populate the values into the plain text fields.

> ✓ Concatenation can also be added to the **Name** and **Description** properties on an object type. See the Name & Description Concatenation Overview article for more information.

To specify which data is populated in the field, administrators edit a plain text field, select a data definition and an object type in that definition, then one or more properties or fields to create variables, which are then used to create an expression. For example, if you created variables for the City and Address select list fields, the expression would look similar to {{{City}}}, {{{Address}}}.

An expression with variables. All variables must be enclosed in triple curly braces.

The fields used as variables in an expression.

The variable fields successfully populating in the Contact Information field from the fields used in the previous screenshot.

Important Notes

- Concatenations **cannot** be applied to existing objects or rich text formatting field types.
- Unlike concatenations on an object type, you can select any data definition within the org to filter which properties and fields are available for variables.
- Prior to creating expressions, you must ensure the required fields and **Location** property, if applicable, have been added to the applicable object types in the selected data definition.
- Spaces and special characters in variable names or inside the curly braces are not permitted. For example, **{{{RiskName}}}** is valid, but **{ {{Risk Name}}}** will result in an error.
- When adding data from the **Location** property, a separate variable must be created for each address component you wish to include in the concatenation (i.e., City, State, Country, etc.).
- When adding the **Country** location component as a variable, these values are displayed using the ISO 3-character code (e.g., CAN for Canada or USA for the United States).
- When the **State** location component is used as a variable, it's displayed using the ISO 2-character code. If the state or province belongs to a region that does not use 2-character codes (e.g., Australia), a 3-character code is used instead.
- Concatenations do not automatically update if their property or field variables are changed. A new object must be created to reflect any changes. For example, if the concatenation **{{{FirstName}}} {{{LastName}}}** displays **John Smith**, but the **{{{FirstName}}}** property is changed to **Joe**, the concatenation will still display **John Smith**.
- If multiple users from different time zones are simultaneously triggering concatenations that use Date & Time field or Created On property data, they may produce different results. This is because the date and time selections made in a **Date & Time** field are based on the time zone of the user who made the selection. Likewise, the date generated in the **Created On** property is based on the time zone of the user who created the object. See the Time Zone Conversions on Concatenations article for more information.

Instructions

To create a concatenation on a text field:

1. Create a new text field, ensuring the **Single Line** or **Multiple Lines** text type is selected.
2. Click **Configure Value Concatenation** in the **Text Type** section to display the **Edit Concatenation** screen. This option will not appear until the field is saved.

The Text Type section.

3. Select a data definition from the **Data Definition** dropdown menu. This will determine which object types' properties and fields are available to add as variables.

A new concatenation with no variables or expression.

> [i] If you want to select another data definition, you must delete the concatenation by clicking the **X** icon beside the concatenation on the **Editing Field** page, then recreate it.

4. Click **Add Variable**.

5. Select an object type in the data definition from the **Select Object Type** dropdown menu.

6. Select a property or field you want to auto-populate in an object's name or description from the **Available Component** dropdown menu.

   - If you selected the **Created On** property or date field, select a date format (e.g. YYYY-MM-DD) from the **Variable Format** dropdown menu. See the Time Zones on

Concatenations article for more information on how this information is captured.

- If you selected the **Location** property, choose an address component from the **Select Address Component** dropdown menu (i.e., House Number, Street, City, State, ZIP Code, or Country). Note that a separate variable must be created for each address component.

7. Enter a name for the variable in the **Variable Name** field.

> [i] Spaces and special characters in variable names are not permitted. For example, naming a variable **RiskName** in the **Variable Name** field is valid, but entering **Risk Name** in this field will result in an error.

8. **Optional:** To display a default word or phrase in the concatenation when the variable has no data, enter that word or phrase in the **Default Value** field (e.g., "Null" or "None provided").

9. If the variable is from the same object type where the plain text field is saved as a component, (e.g. the plain text field is saved to the Employee Record object type and the variable you're creating is also from a property or field also on the Employee Record object type) select the **Self** checkbox.
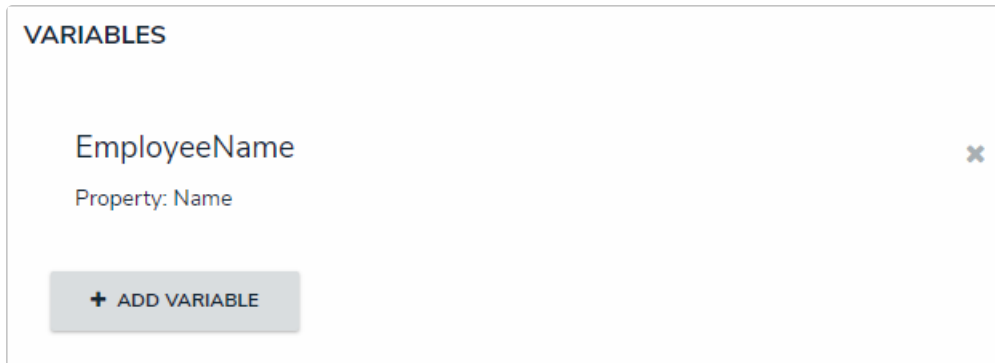
Creating a new variable in the Edit Concatenation palette.

10. Click **Add** to save the variable.
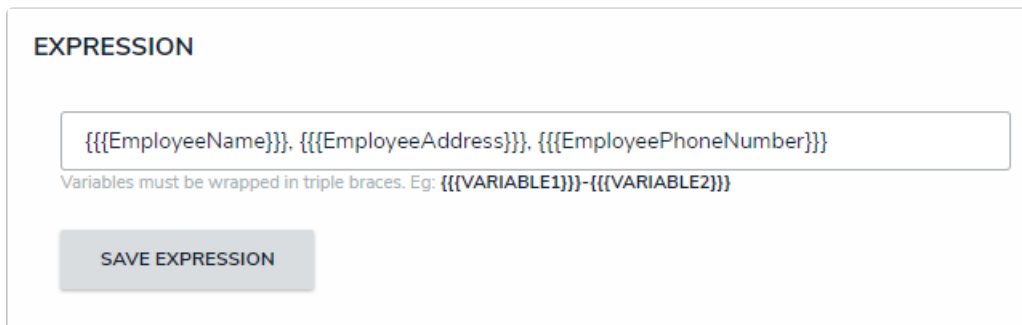
A new variable, which can now be included in the expression.

11. Repeat steps 4-10 above to continue adding variables as needed.

12. Type the variable names in the **Expression** field. Variables can be entered in any order, but they must be enclosed in triple curly braces (e.g. {{{CreatedBy}}}) **with no spaces or special characters within the braces**. If needed, you can include spaces and other alphanumeric characters between the variables.
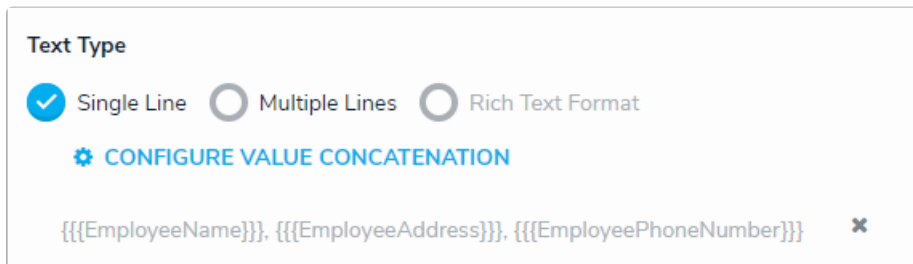

An expression with variables. All variables must be enclosed in triple curly braces.

13. Click **Save Expression**.

A concatenation saved to the field.

14. To edit a variable, it must be deleted by clicking the ✖ icon from the **Edit Concatenation** palette, then recreated.

15. To delete the concatenation, click the ✖ icon from the **Editing Field** page.