

Text Field Concatenation

Last Modified on 09/18/2024 3:58 pm EDT

Overview

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}}}`.

Results from concatenation calculations are currently limited to the following:

- Object Name, Single-line Text fields - 300 characters
- Object Description, Multi-line Text fields - 20,000 characters

User Account Requirements

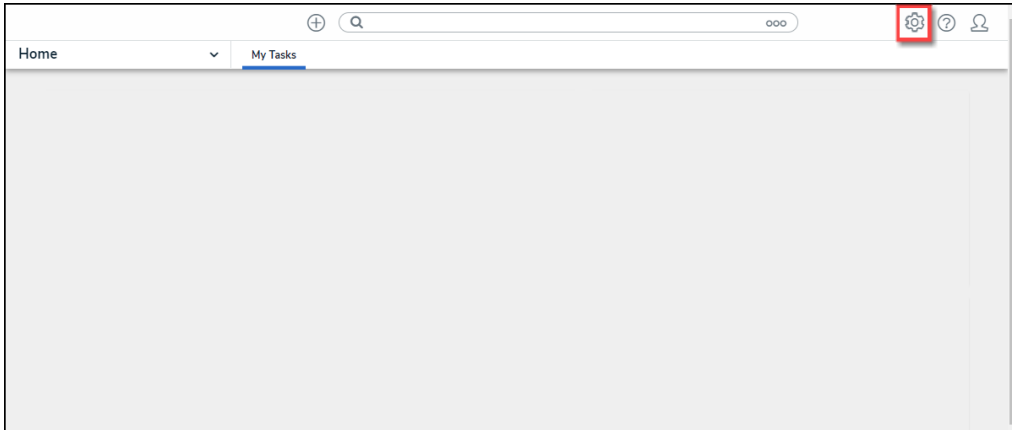
The user account used to login to the system must have administrative or advanced permissions to access the ***Admin Overview*** screen.

Related Information/Setup

Please see the [Text Fields](#) article for more information on how to create a text field.

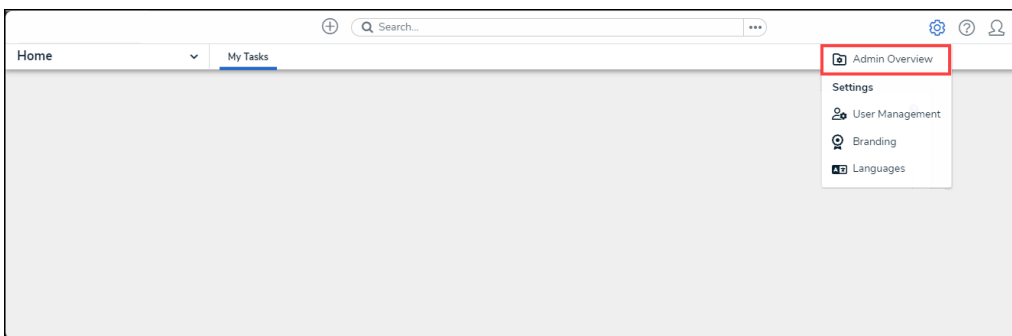
Navigation

1. From the ***Home*** screen, click the ***Administration*** icon.



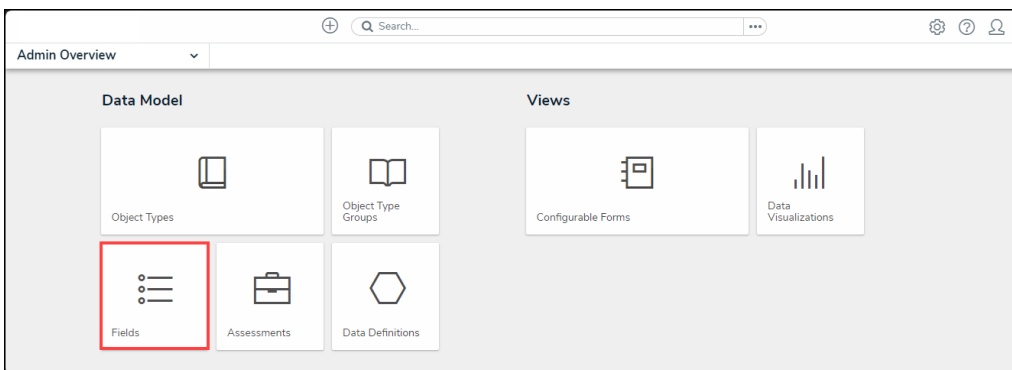
Administration Icon

- From the **Administrator Settings** menu, click the **Admin Overview** link.



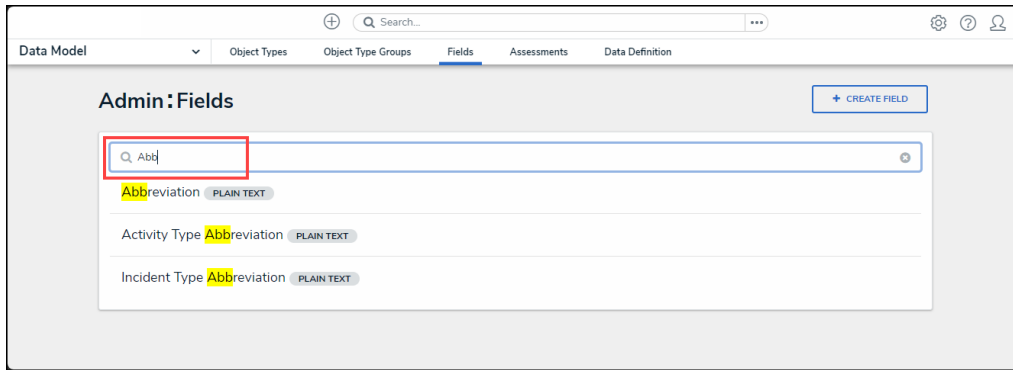
Admin Overview Link

- From the **Admin: Overview** screen, click the **Fields** tile under the **Data Model** section.



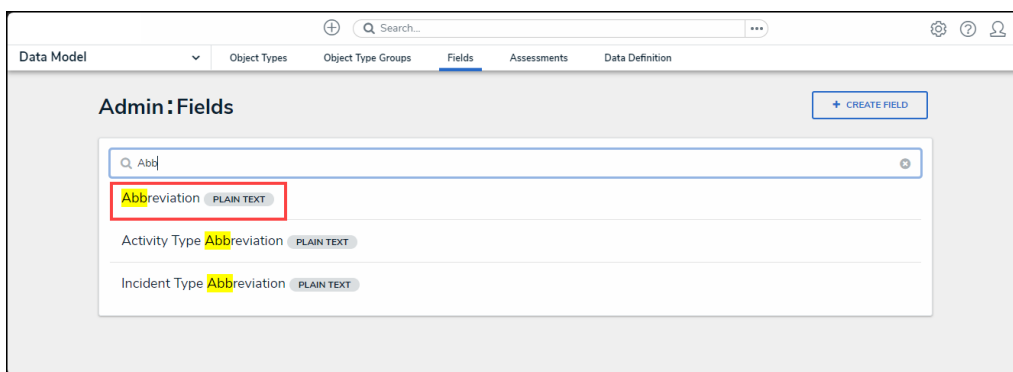
Fields Tile

- From the **Admin: Fields** screen, enter a **Field Name** in the **Search** field to narrow the search results.



Search Field

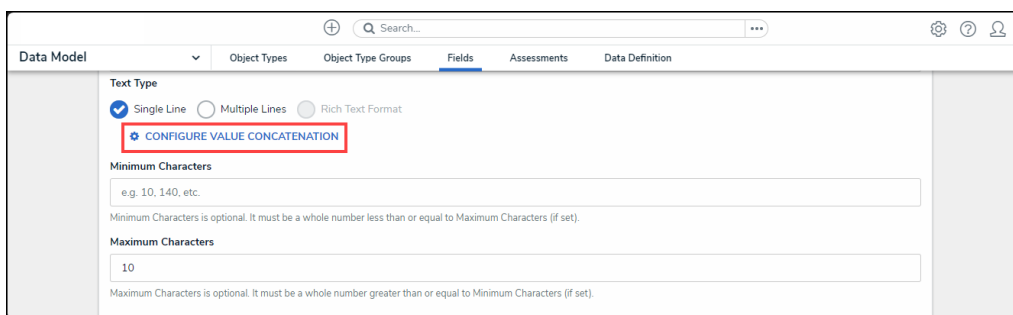
5. Click on a **Field** that is a **Plain Text** field.



Plain Text Field

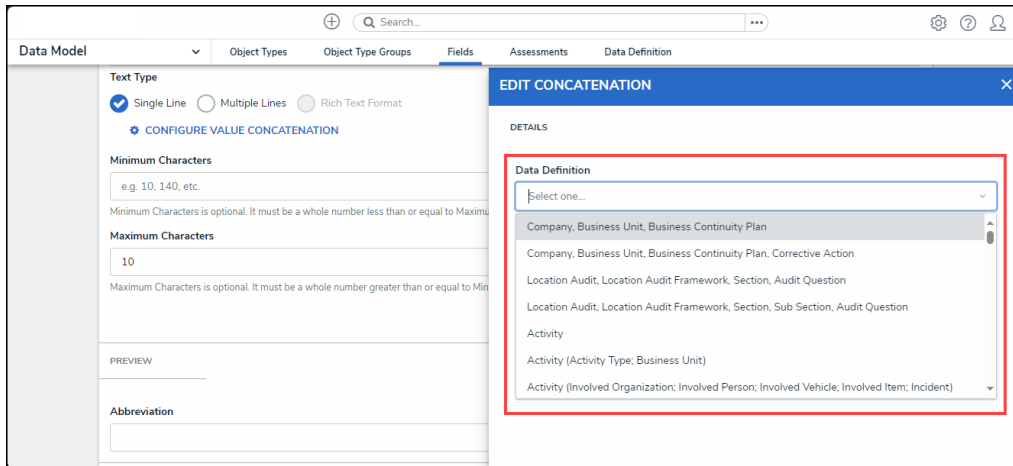
Creating a Concatenation on a Text Field

1. From the **Admin: Editing Field** screen, click the **Configure Value Concatenation** link under the **Text Type** field.



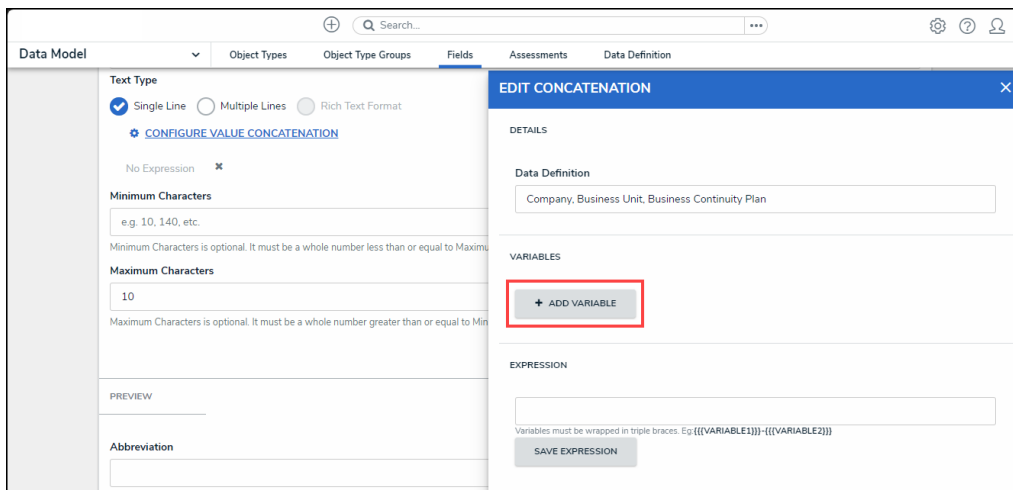
Configure Value Concatenation Link

2. From the **Edit Concatenation** pop-up, select a **Data Definition** from the **Data Definition** dropdown menu. The Data Definition determines which object types, properties, and fields are available to add as variables.



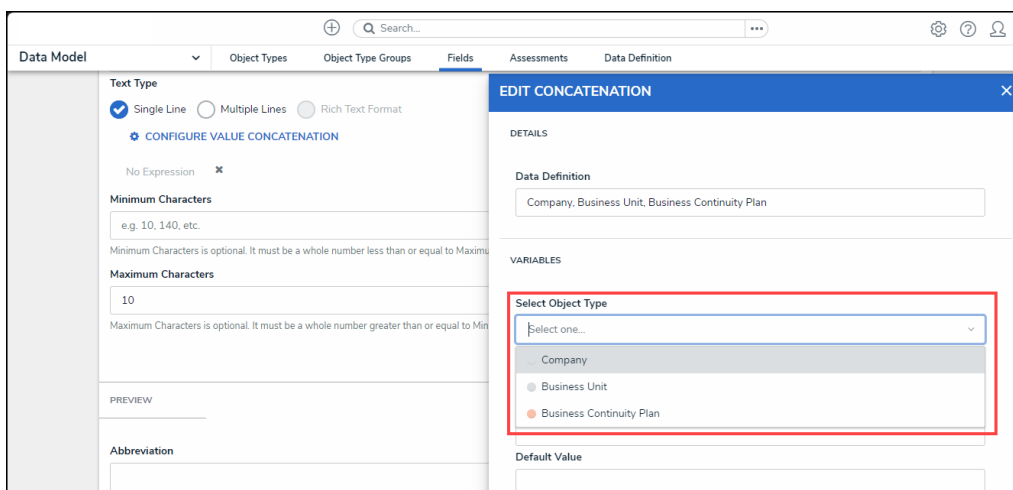
Edit Concatenation Pop-up

3. From the **Variables** section, click the **+ Add Variables** button.



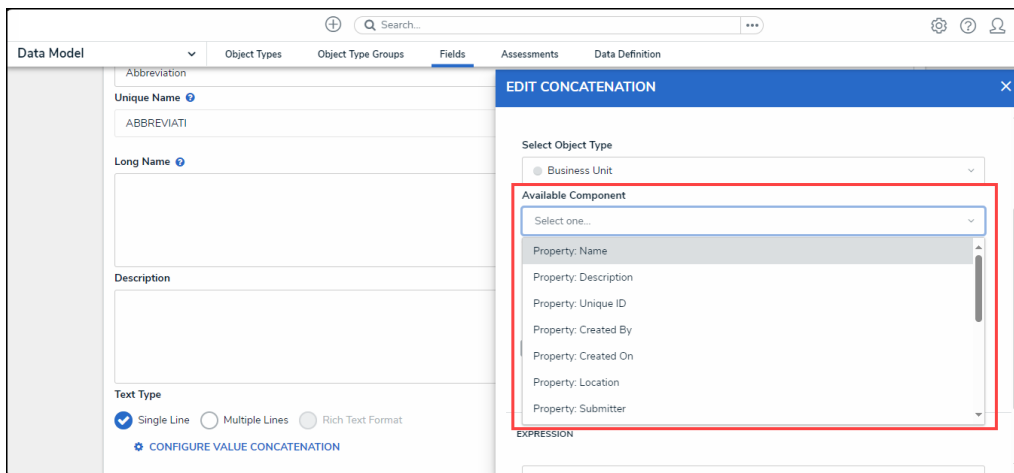
+ Add Variables Button

4. Select an **Object Type** from the **Select Object Type** dropdown menu. Only object types within the data definition will appear on the dropdown menu.



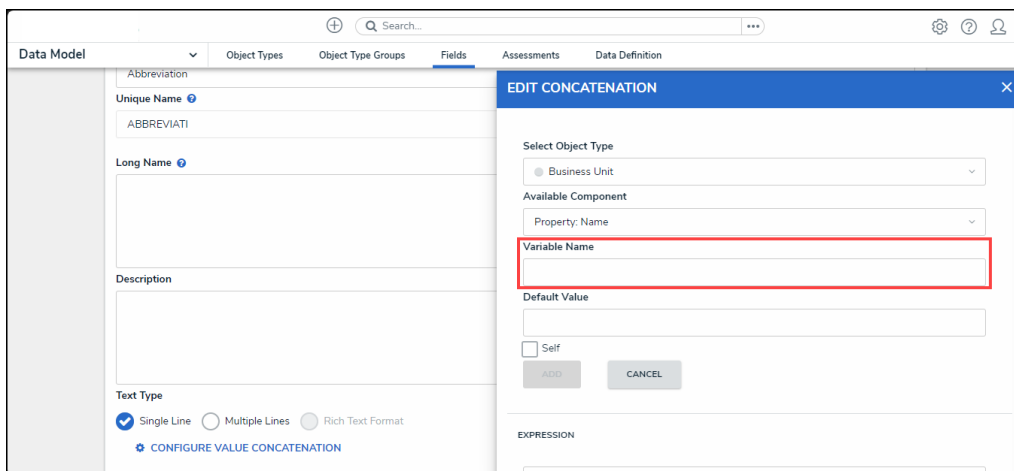
Select Object Type Dropdown Menu

5. Select a property or field from the **Available Component** dropdown menu.
 - If you selected the **Created On** property or **date** field, the **Variable Format** field will appear. 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, the **Select Address Component** field will appear. Choose an address component from the **Select Address Component** dropdown menu (i.e., House Number, Street, City, State, ZIP Code, or Country). A separate variable must be created for each address component.



Available Component Dropdown Menu

6. Enter a variable name in the **Variable Name** field. Spaces and special characters are not permitted. For example, naming a variable RiskName in the **Variable Name** field is valid, but entering Risk Name will result in an error.



Variable Name Dropdown Menu

7. **(Optional)** Enter a value in the **Default Value** field. Values entered in the default value field will be displayed in the **Concatenation** field when the variable has no data (e.g., Null, None Provided, etc.).

The screenshot shows the 'EDIT CONCATENATION' dialog box. On the left, the 'Fields' configuration page is visible, showing fields like 'Abbreviation', 'Unique Name', 'Long Name', and 'Description'. The 'Text Type' section has 'Single Line' selected. The 'Default Value' field in the dialog is highlighted with a red border. Below it, the 'Self' checkbox is unchecked. The 'ADD' and 'CANCEL' buttons are visible at the bottom of the dialog.

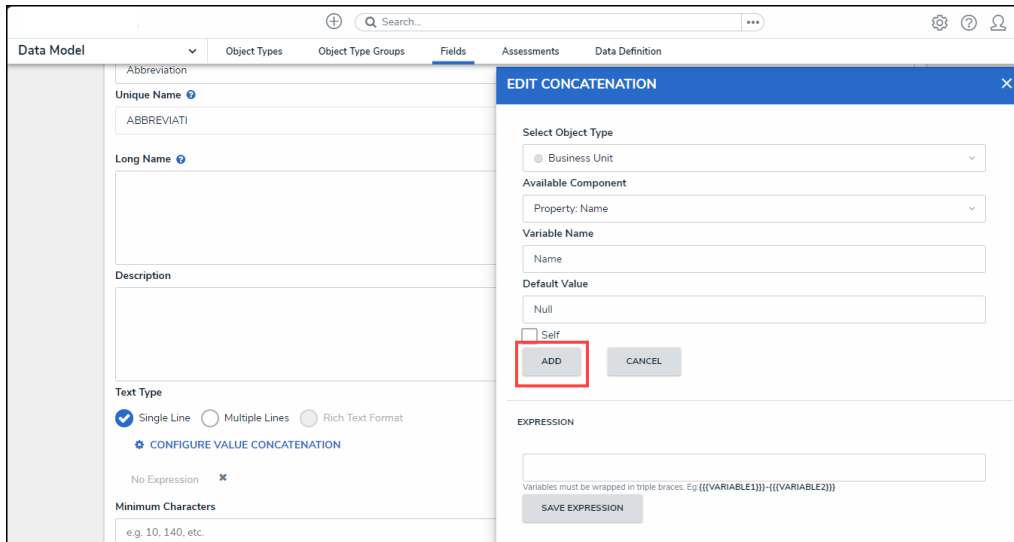
Default Value Field

8. Select the **Self** checkbox 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 are creating is also from a property or field on the Employee Record object type).

The screenshot shows the 'EDIT CONCATENATION' dialog box. The 'Self' checkbox is now checked and highlighted with a red border. The 'Default Value' field contains the text 'Null'. The 'ADD' button is highlighted. The 'EXPRESSION' field is empty, and the 'SAVE EXPRESSION' button is visible at the bottom.

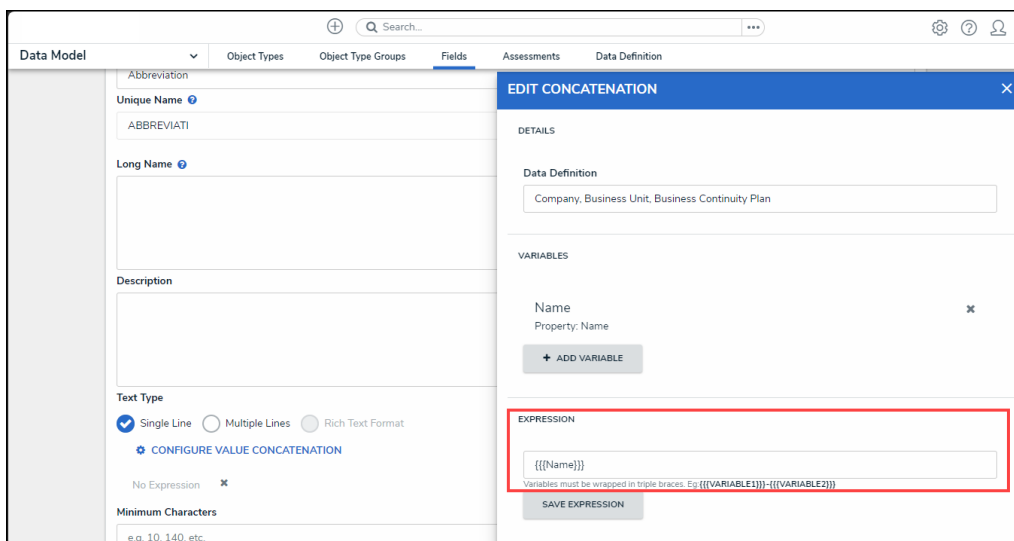
Self-Checkbox

9. Click the **Add** button to save the variable.



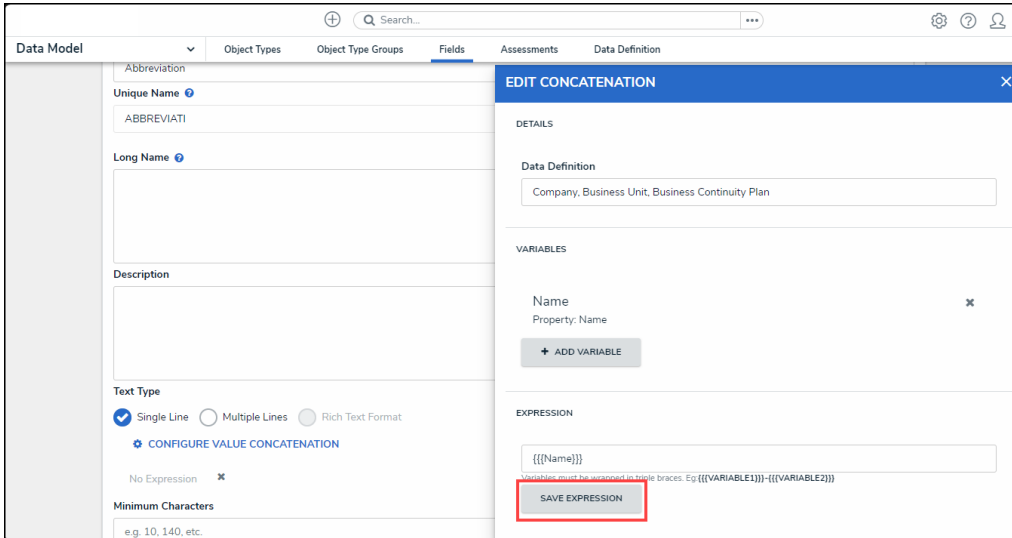
Add Button

10. Repeat steps 2 to 9 to add additional variables.
11. Enter 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.



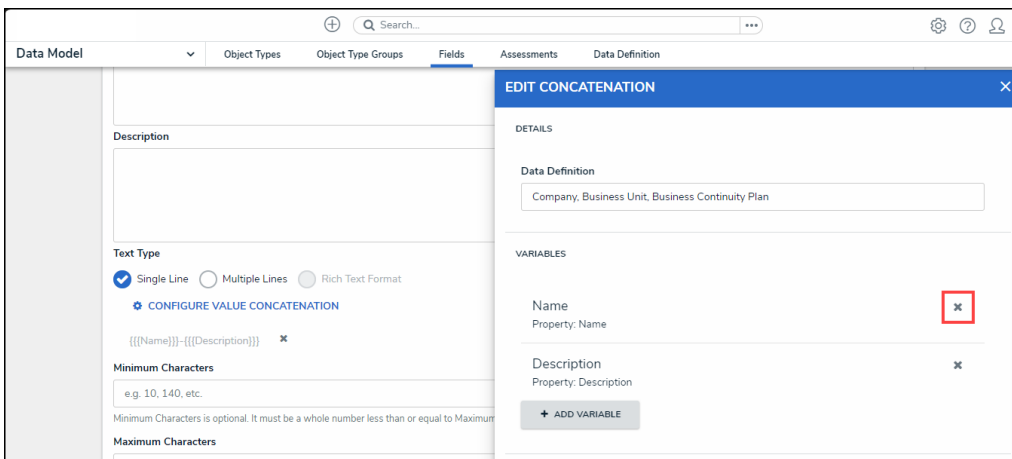
Expression Field

12. Click the **Save Expression** button.



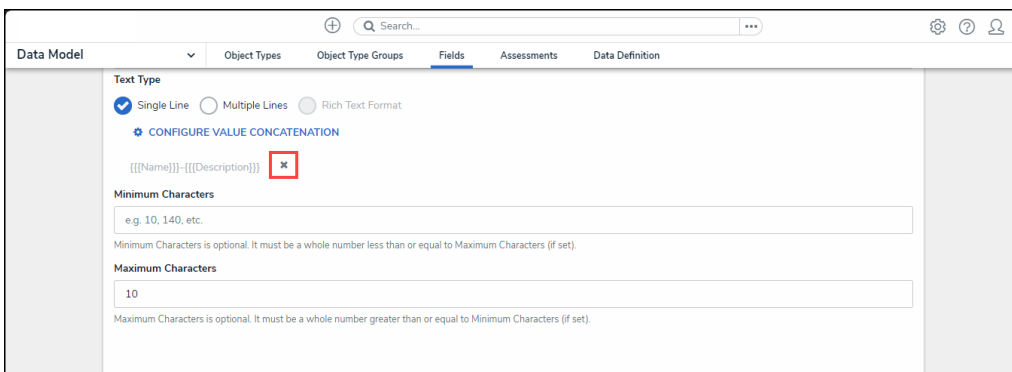
Save Expression Button

13. Users cannot edit a variable in order to edit a variable you must delete the variable by clicking the **Delete** icon next to a **Variable** and create a new variable.



Delete Icon

14. From the **Admin: Editing Fields** screen, if you want to select another data definition, you must delete the concatenation by clicking the **Delete** icon beside the concatenation, then create a new one.



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.