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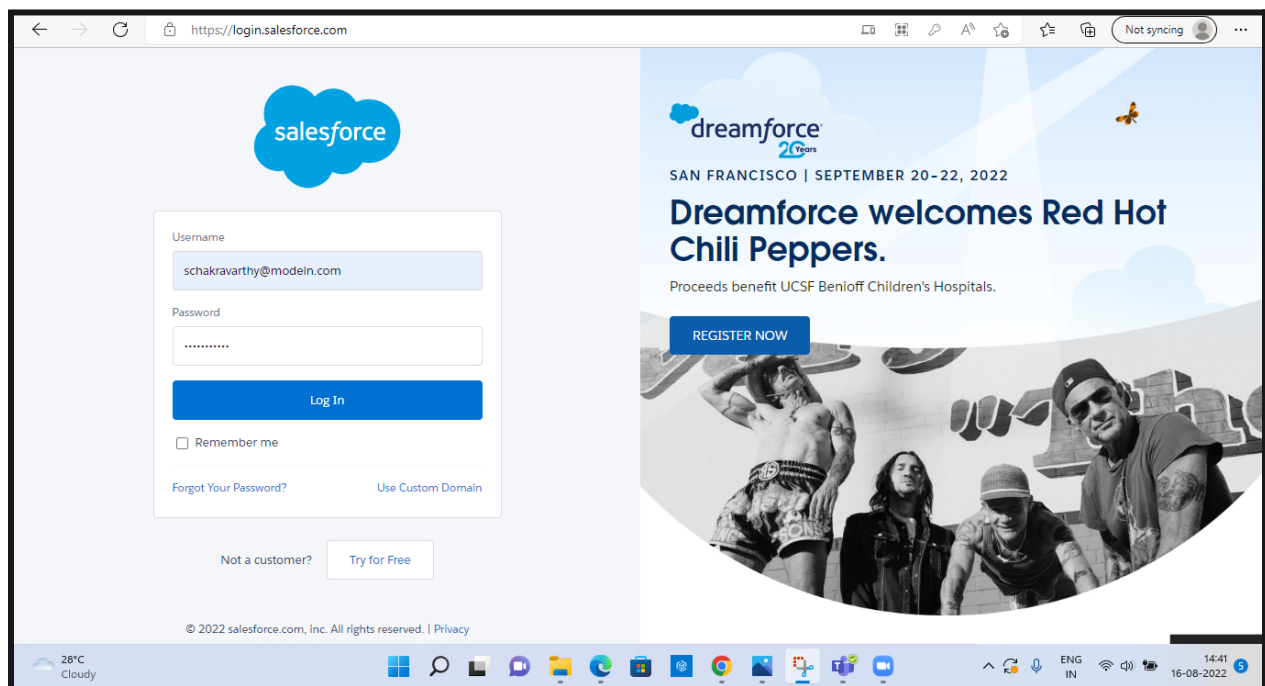


## Overview :

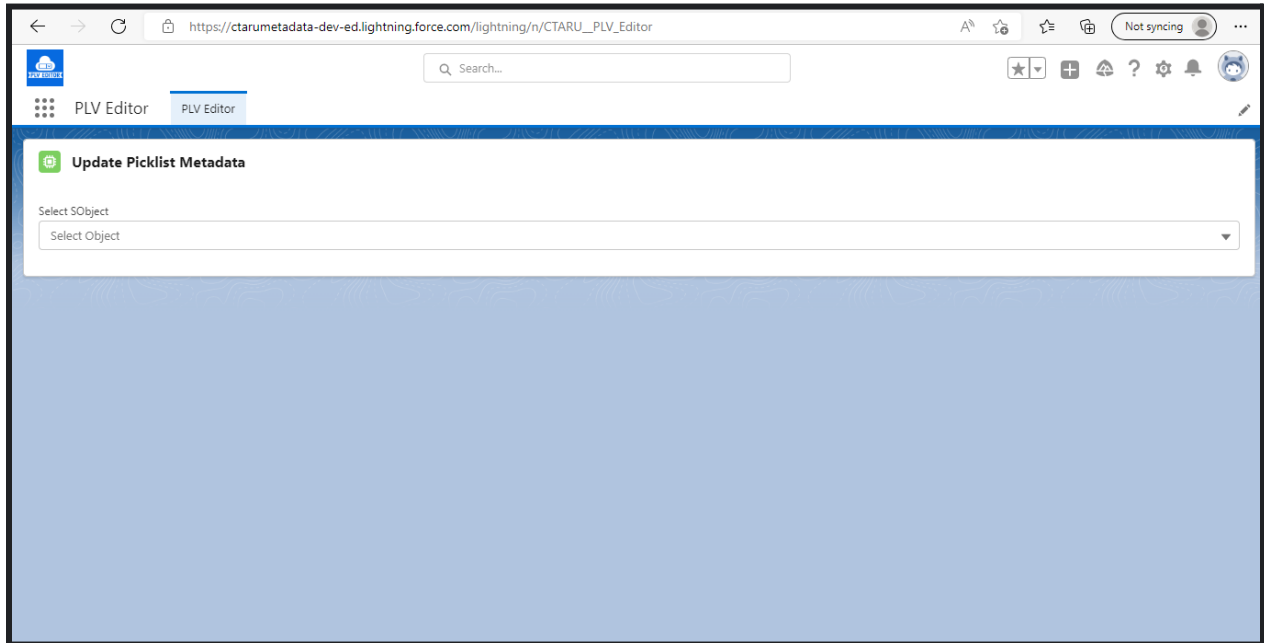
The purpose of this page is to Add/Update picklist values by the user without opening the object manager page. This page is useful for new users as they can select the object and the particular field to Add/Update picklist values. This page provides an easy way to add picklist values for the non-salesforce users.

## Procedure For Logging into Portal:

- Step 1: Enter the URL specified below in any browser.
- Link for Login: [Login | Salesforce](#)



## PLV Editor page:



## Add the Picklist Values :

In the below example we are trying to add a new picklist value for the Account Type picklist field in the Account object.

- Select the object required.
- Select the picklist field.
- To add the new required picklist value click on the “Add New Picklist Value” button.

The screenshot shows the 'Update Picklist Metadata' interface in the CloudTaru PLV Editor. The 'Select Object' dropdown is set to 'Account' and the 'Select Picklist Field' dropdown is set to 'Account Type'. A table lists existing picklist values with columns for Value, API Name, Default, and Active. A red arrow points to the 'Add New Picklist Value' button at the bottom.

| Value                      | API Name                   | Default | Active |
|----------------------------|----------------------------|---------|--------|
| Prospect                   | Prospect                   | false   | true   |
| Customer - Direct          | Customer - Direct          | false   | true   |
| Customer - Channel         | Customer - Channel         | false   | true   |
| Channel Partner / Reseller | Channel Partner / Reseller | false   | true   |
| Installation Partner       | Installation Partner       | false   | true   |
| Technology Partner         | Technology Partner         | false   | true   |
| Other                      | Other                      | false   | true   |

[+ Add New Picklist Value](#)

- User can able to view a new interface “Add New Picklist value”
- Add the required picklist value and click on the add button.

The screenshot shows the Salesforce Lightning interface for updating picklist metadata. The main window is titled 'Update Picklist Metadata' and has a close button (X) in the top right corner. It features two dropdown menus: 'Select SOObject' (set to 'Account') and 'Select Picklist Field' (set to 'Account Type'). Below these is a table with columns 'Value', 'API Name', 'Default', and 'Active'. The table lists several picklist values for 'Account Type', including 'Prospect', 'Customer - Direct', 'Customer - Channel', 'Channel Partner / Reseller', 'Installation Partner', 'Technology Partner', and 'Other'. Each row has a 'Default' checkbox and an 'Active' checkbox. The 'Active' column shows 'true' for all listed values. At the bottom of the table is a button labeled '+ Add New Picklist Value'. A modal dialog box titled 'Add New Picklist Value' is open in the center, containing two input fields for 'Value' and 'API Name', a 'Default' checkbox, and an 'Active' checkbox (which is checked). There are 'Cancel' and 'Add' buttons at the bottom of the modal.

| Value                      | API Name                   | Default | Active |
|----------------------------|----------------------------|---------|--------|
| Prospect                   |                            |         | true   |
| Customer - Direct          | Customer - Direct          | false   | true   |
| Customer - Channel         | Customer - Channel         | false   | true   |
| Channel Partner / Reseller | Channel Partner / Reseller | false   | true   |
| Installation Partner       | Installation Partner       | false   | true   |
| Technology Partner         | Technology Partner         | false   | true   |
| Other                      | Other                      | false   | true   |

- Users are able to view the picklist value in the page.
- Click on the save button.

← → ↻ [https://ctarumetadata-dev-ed.lightning.force.com/lightning/n/CTARU\\_PLV\\_Editor](https://ctarumetadata-dev-ed.lightning.force.com/lightning/n/CTARU_PLV_Editor) Not syncing

SALESFORCE

Q Search...

PLV Editor PLV Editor

Account

Select Picklist Field

Account Type

| Value                      | API Name                   | Default | Active |  |
|----------------------------|----------------------------|---------|--------|--|
| Prospect                   | Prospect                   | false   |        |  |
| Customer - Direct          | Customer - Direct          | false   |        |  |
| Customer - Channel         | Customer - Channel         | false   |        |  |
| Channel Partner / Reseller | Channel Partner / Reseller | false   |        |  |
| Installation Partner       | Installation Partner       | false   |        |  |
| Technology Partner         | Technology Partner         | false   |        |  |
| Other                      | Other                      | false   |        |  |
| Current                    | Current                    | false   | true   |  |

+ Add New Picklist Value

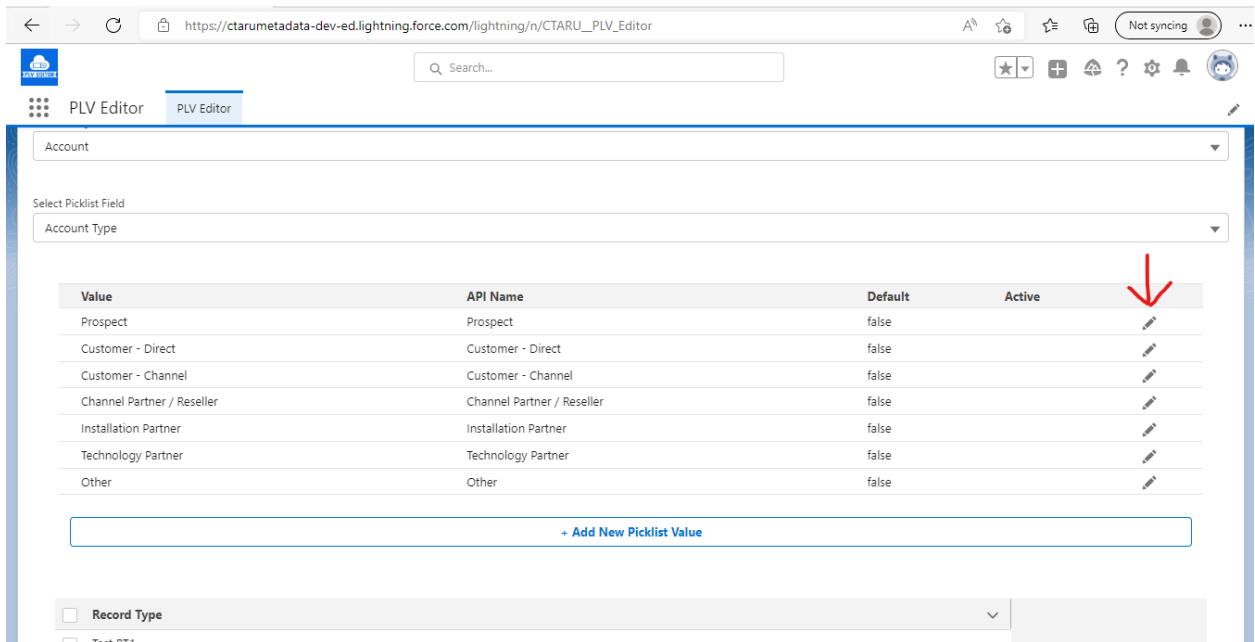
Save

Record Type

## Update the Picklist Values

To update picklist value click on the pencil icon user is able to view the Modify picklist window. Try to update the picklist value and click on the modify button. Users are able to view the changes made in the picklist value and click on save button to update the value.

- Select the object required.
- Select the picklist field.
- To Modify the required picklist value click on the Pencil icon.

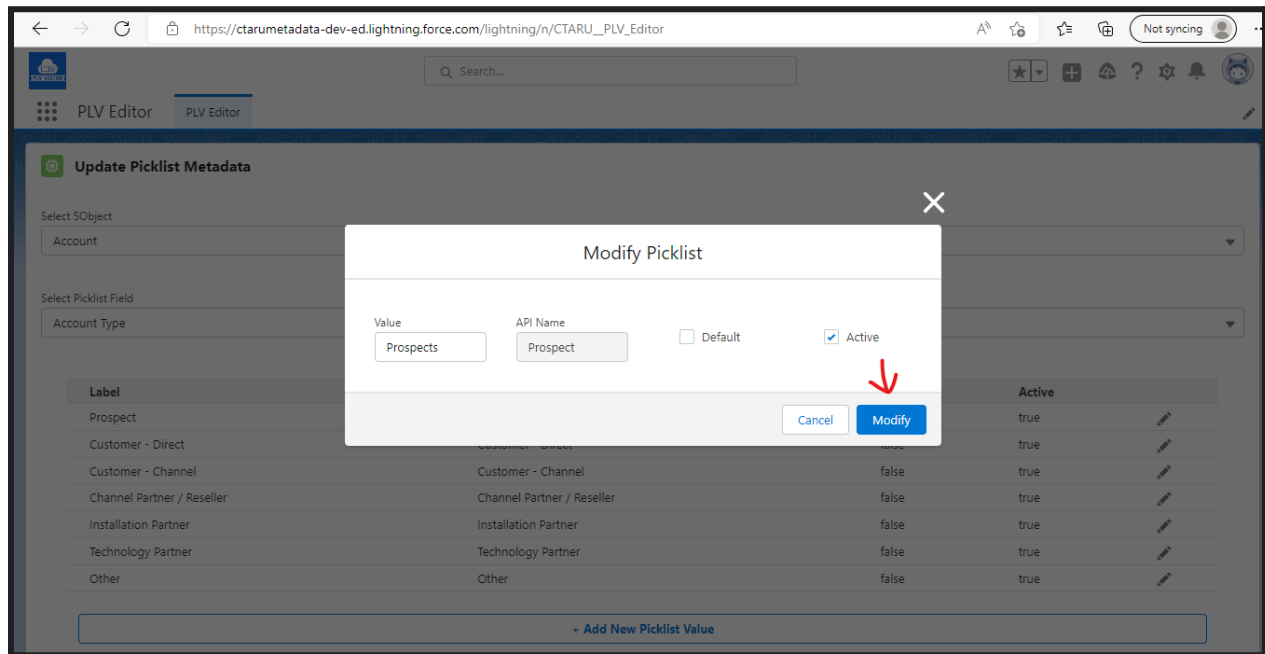


The screenshot shows the 'PLV Editor' interface in a Salesforce Lightning environment. The browser address bar indicates the URL: [https://ctarumetadata-dev-ed.lightning.force.com/lightning/n/CTARU\\_PLV\\_Editor](https://ctarumetadata-dev-ed.lightning.force.com/lightning/n/CTARU_PLV_Editor). The interface includes a search bar and a 'Not syncing' status indicator. The main content area is titled 'PLV Editor' and shows a dropdown menu for 'Account' and a 'Select Picklist Field' dropdown set to 'Account Type'. Below this is a table with the following columns: Value, API Name, Default, Active, and an edit icon (pencil). A red arrow points to the pencil icon in the 'Active' column of the first row.

| Value                      | API Name                   | Default | Active |                                                                                       |
|----------------------------|----------------------------|---------|--------|---------------------------------------------------------------------------------------|
| Prospect                   | Prospect                   | false   |        |  |
| Customer - Direct          | Customer - Direct          | false   |        |  |
| Customer - Channel         | Customer - Channel         | false   |        |  |
| Channel Partner / Reseller | Channel Partner / Reseller | false   |        |  |
| Installation Partner       | Installation Partner       | false   |        |  |
| Technology Partner         | Technology Partner         | false   |        |  |
| Other                      | Other                      | false   |        |  |

Below the table is a button labeled '+ Add New Picklist Value'. At the bottom, there is a 'Record Type' dropdown menu set to 'Tact RT1'.

- User can able view a new interface “Modify picklist”
- Update the required picklist vaule and click on Modify



- Click on save to update the picklist value.

Update Picklist Metadata

Select SObject  
Account

Select Picklist Field  
Account Type

| Label                      | Value                      | Default | Active |
|----------------------------|----------------------------|---------|--------|
| Prospects                  | Prospect                   | false   | true   |
| Customer - Direct          | Customer - Direct          | false   | true   |
| Customer - Channel         | Customer - Channel         | false   | true   |
| Channel Partner / Reseller | Channel Partner / Reseller | false   | true   |
| Installation Partner       | Installation Partner       | false   | true   |
| Technology Partner         | Technology Partner         | false   | true   |
| Other                      | Other                      | false   | true   |

+ Add New Picklist Value

Save

### Global Picklist Values

A global picklist exists independently as a global picklist value set . Its values are shared with any picklist that's based on it. A global picklist is a restricted picklist by nature. Only a Salesforce admin can add to or modify its values. If the picklist uses a global picklist value set, you can change its values only by editing the global value set. Your changes affect all picklists that inherit their values from that global value set.

### Custom Picklist Values

Custom picklist fields help enable users to select values from pre-defined picklists that the administrator creates. By using the PLV Editor tool users can directly edit the picklist value from the PLV Editor page.

### Benefits of using this Tool

1. Deployment of picklist values is completely removed in SDLC. This means picklist values can be directly deployed in the Production environment without testing it in lower orgs.
2. If Global picklist values are added or updated, changes will be carried over to related picklist values in objects.
3. Picklist values can be added/ updated specific related record types
4. Picklist values can be added / updated in Restricted / Non-Restricted picklist fields.
5. Only Business administrators can add / update the picklist values accessible by them.
6. Picklist values can be inactivated in Global picklist, custom picklist in both restricted and non-restricted fields by Business Admin.

## Limitations

1. Field dependencies cannot be added/updated.
2. Once Org is updated, the code repository needs to be updated by DevOps or respective team.
3. This tool doesn't overcome any limitations of Salesforce related to picklist values.
4. This tool doesn't support Standard picklists values.