

Information like tracking numbers, invoice numbers, or other consecutively ordered numbers is a part of the business. Often, your business processes require these types of numbers to be customized and formatted into more valuable formats than a bunch of random numbers and letters. Fortunately, Salesforce has an out of box solution to solve this issue. You can create automatically generated number fields on any standard or custom Object. The Data Type that Salesforce uses for this is called **Auto Number**.

Auto Number - Automatically generates a values for each new record incrementally that can be customized for your business process.

## What are Auto Numbers

Auto Numbers are fields that automatically generate numbers incrementally. You can display numbers from 1 digit up to a max of 10 digits. You are also allowed to customize the display format better to meet the unique naming conventions of your business. We will walk through the steps to create an Auto Number field later in this guide, but first, let's go over some of the detailed areas unique to Auto Numbers.

**Display Format** - A Display Format allows you to control the appearance of the Auto Number field. A Display Format consists of the variables described below. You can add characters as prefixes or suffixes to make them more customizable to your business needs.

# Variables in a Display Format

SYMBOL	REQUIRED	DESCRIPTION
{0}	✓	Sequence number. One or more zeros enclosed in curly braces dictates the minimum number of digits that will be displayed. If the number has fewer digits required, leading zeros will be added.
{YY} {YYYY}		This represents the year. Can be displayed in either two- or four-digit years. Uses two or four "Y" characters enclosed in curly braces representing the year the record was created.
{MM}		This represents the Month of the year. Uses two "M" characters enclosed in curly braces that represent the numeric month
{DD}		This represents the Day of the month. Uses two "D" characters enclosed in curly braces to represent the numeric day of the month.

## Variables in a Display Format

**Starting Number** – The starting number identifies what number the records will begin. The record number will increase incrementally from here by one digit each time a new record is created.

**External ID** – This check box sets this field as the Unique Record Identifier from an external system.

## How to Create an Auto Number Field on Your Object

The first thing you need to do is go to the Object Manager in Salesforce

- **Setup**

- **Object manager**
- Select the **Object** you want to add an Auto Number field to
- **Field & Relationships**
- **New**
- Choose **Auto Number**

**Tour**  
New Custom Field Help for this Page

**Step 1. Choose the field type** Step 1

Specify the type of information that the custom field will contain.

**Data Type**

☒ None Selected Select one of the data types below.

☒ **Auto Number** A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

☐ Formula A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

☐ Roll-Up Summary A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

☐ Lookup Relationship Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

☐ Master-Detail Relationship Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

☐ External Lookup Relationship Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

☐ Checkbox Allows users to select a True (checked) or False (unchecked) value.

☐ Currency Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

☐ Date Allows users to enter a date or pick a date from a popup calendar.

☐ Date/Time Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.

☐ Email Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.

☐ Geolocation Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.

☐ Number Allows users to enter any number. Leading zeros are removed.

☐ Percent Allows users to enter a percentage number, for example, "10" and automatically adds the percent sign to the number.

☐ Phone Allows users to enter any phone number. Automatically formats it as a phone number.

☐ Picklist Allows users to select a value from a list you define.

☐ Picklist (Multi-Select) Allows users to select multiple values from a list you define.

Next Cancel

## Custom Field – Auto Number

### Click **Next**

In this screen, we will fill out all of the field details. We will fill out the field label, determine the display format ( see the above chart and description for more information), Field Name, Description, and Help Text. In this example, I am creating an auto-generated Tour Number in the following format: T-22-0012. It starts with the letter T, has the two-digit year, and has four digits for the auto-incrementing number.

Tour  
New Custom Field

Step 2. Enter the details

Step 1: Field Label: **Tour Number**

Step 2: Display Format: **T-{YY}{0000}** Example: A-{0000} [What Is This?](#)  
Starting Number: **1**

Step 3: ☒ Generate Auto Number for existing records

Step 3: Field Name: **Tour Number**

Description: Auto Generates a Tour Number for ID purposes

Step 4: Help Text: Auto Generates a Tour Number for ID purposes

Step 5:

External ID ☐ Set this field as the unique record identifier from an external system

Auto add to custom report type ☒ Add this field to existing custom report types that contain this entity [i](#)

## New Custom Field – Details Page

- Step 1 – Field Label: **Tour Number**
- Step 2 – Display Format: **T-{YY}{0000}**
- Step 3 – Field Name: This is the API Name, and in our example: **Tour\_Number**
- Step 4 – Description: Describes the purpose of the field
- Step 5 – Help Text: Provides a message for help

After that, you need to follow the Prompts to finish out the screens

**Next**

**Next**

Congratulations! You now have a field that auto-generates numbers in the format that fits your business process.