

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**

Master the Art of Active Listening with These 5 Tips

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

The screenshot shows the 'New Custom Field' wizard in Salesforce. The title bar says 'Tour New Custom Field'. The step indicator shows 'Step 1. Choose the field type'. Below the title bar, there's a text prompt: 'Specify the type of information that the custom field will contain.' Below this is a list of data types with radio buttons. The 'Auto Number' option is selected and highlighted with a blue box. The other options are: None Selected, Formula, Roll-Up Summary, Lookup Relationship, Master-Detail Relationship, External Lookup Relationship, Checkbox, Currency, Date, Date/Time, Email, Geolocation, Number, Percent, Phone, Picklist, and Picklist (Multi-Select). Each option has a brief description of its functionality.

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.

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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**
☒ Generate Auto Number for existing records

Step 3 Field Name **Tour Number**
Description **Auto Generates a Tour Number for ID purposes**
Help Text **Auto Generates a Tour Number for ID purposes**

Step 4

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

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