



The Right Technology, the Right Results

CRM – Creating Custom Fields Quick User Guide

CAUTION: It is **HIGHLY** recommended that you do not delete fields from module screens due to the fact that many fields are linked to other fields within the system. Deleting them could break the link and thus break your system. The fields listed below are those we currently are aware of that you **MUST** not remove. There are probably others; thus **DO NOT** delete any fields.

Do not delete or rename the below fields:

- ❖ Assign to
- ❖ Team
- ❖ Sales Stages
- ❖ Opportunity Types
- ❖ Lead Source
- ❖ Amount
- ❖ Probability

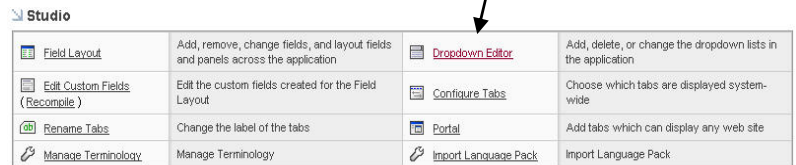
Creating Customized Fields, Labels and Drop Down Lists in the CRM

If your custom field contains a drop down list, you need to follow Step A to create that drop down list first.

If it is **NOT** a drop down list, then you can continue to Section B.

A. Creating a Drop Down List:

1. Log into the CRM as an Administrator
2. Click Admin in top right portion of the CRM screen.
3. Select Dropdown Editor in Studio section.




Studio			
Field Layout	Add, remove, change fields, and layout fields and panels across the application	Dropdown Editor	Add, delete, or change the dropdown lists in the application
Edit Custom Fields (Recompile)	Edit the custom fields created for the Field Layout	Configure Tabs	Choose which tabs are displayed system-wide
Rename Tabs	Change the label of the tabs	Portal	Add tabs which can display any web site
Manage Terminology	Manage Terminology	Import Language Pack	Import Language Pack

4. Click **Create Dropdown** in Shortcuts.



5. Enter a name for the new drop down list. (For Documentation purposes, we entered mortgage_type.



NOTE: The underscore in the Dropdown name. It is important that you add this to your drop down name.

6. Click Save.

A. Creating a Drop Down List (Continued):

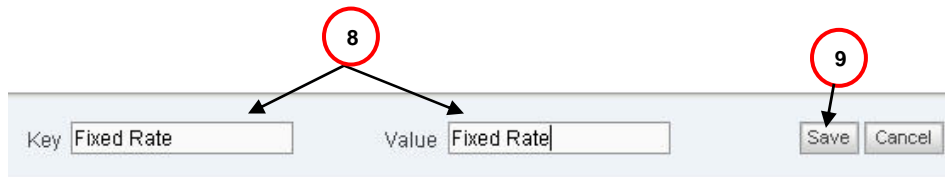
7. **Click Add** (to add entries to your new drop down editor)



8. Enter name Key and Value fields. This will be an item in your drop down list the user can select.

NOTE: The **Key** is used in the Database. The **Value** is what is displayed to the user. You are **limited** to 25 characters.

9. **Click Save**



10. **Repeat** steps 7 through 9 until you have added all entries into your drop down list.

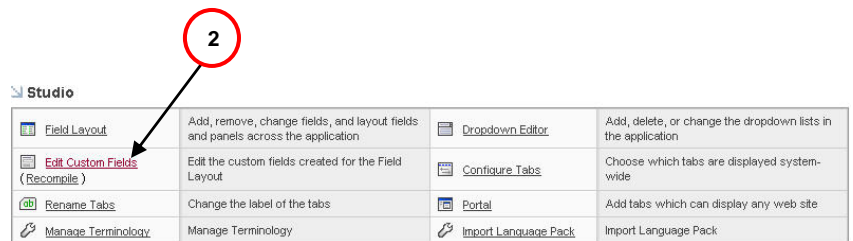
11. **Edit** your new drop down list and delete the top row entry which is blank entry.

12. **Click Save.**

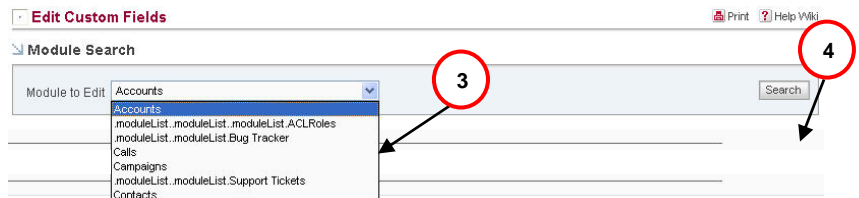
B. Creating Custom Fields:

You need to create a custom field prior to adding a new label to a module. This is important because you will be asked for the custom field name when creating the new label name.

1. Click Admin.
2. Select Edit Custom Fields in the Studio section.

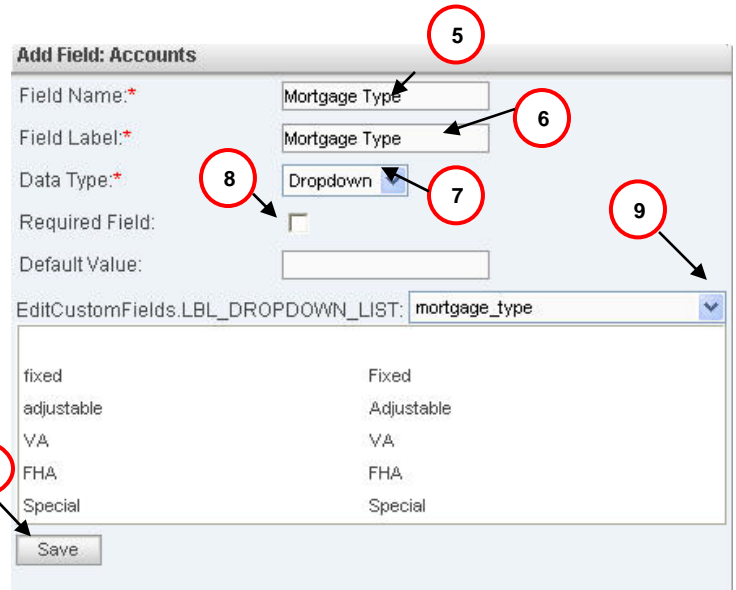


3. **Select the Module** to edit from the Module Select drop down list. (For documentation purposes, we selected Accounts.)
4. **Click Search.**



B. Creating Custom Fields (Continued):

5. Enter Field Name (i.e. Mortgage Type)
6. Enter Field Label (i.e. Mortgage Type)
7. Select Data Type from Drop Down List (For documentation purposes, we selected Dropdown. Refer to the next page for available data types.)
8. Check if you want this required field
9. If you selected Drop Down in Step above Step 7, then select the name of your drop down list from the EditCustomFields LBL_DROPDOWN_LIST. (i.e. mortgage_type)
10. Click Save



NOTE: Available Data Types are:

Text - This is a free form text box.

Text Area - This is free form text, but allows you to enter larger area of text.

Integer - Defines a whole number field.

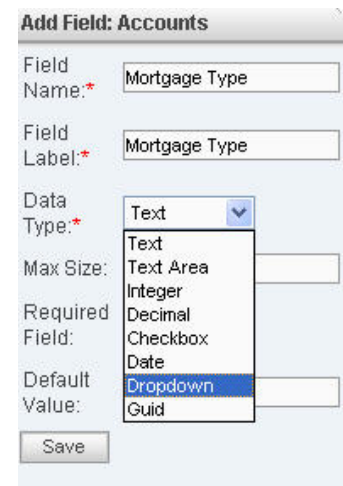
Decimal - This is not a whole number field.

Checkbox - All users to select more than one selection.

Date - Defines a date field.

Dropdown - Defines a list box where users select from a list of choices.

Guid -This is a unique identifier field.

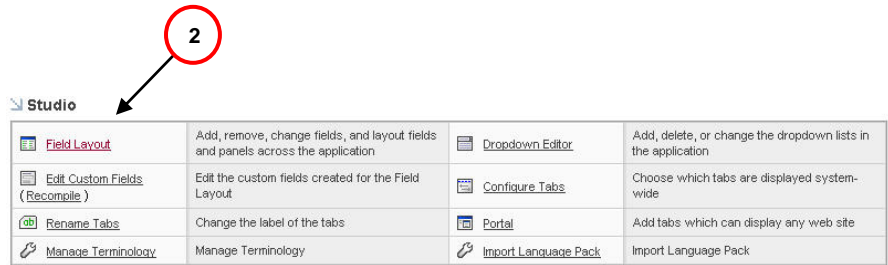


c. Creating a New Label Name:

This section will walk you through creating a new label for the control such as text box, list box, button, etc. This will be the name displayed to the users.

This field will be visible in the View Mode; you need to follow Step D in order for the label to be visible and selectable in the Edit mode.

1. Click Admin.
2. Select Field Layout in Studio Section.



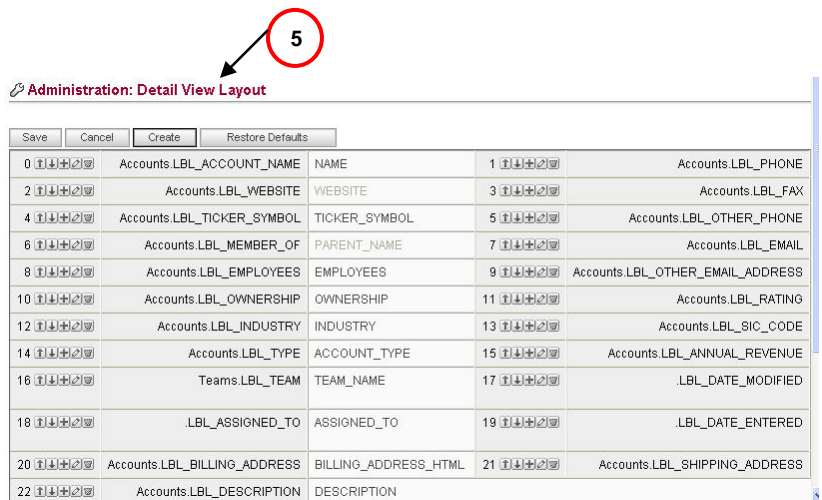
3. Click Detail View Layout.



4. Select the view layout you wish to edit (For documentation purposes, we select Accounts Detail/View).



5. The Administration Accounts DetailView screen displays.



C. Creating a New Label Name (Continued):

6. Click Create (refer to image in above Step 5).
7. The Detail View Field screen displays.
8. **Leave Field Type as String.**
9. Select the Data Label from the drop down list. It will be called something like: Accounts.Mortgage_Type_c

The module name is added to the name. In this case, since we chose Accounts from the Detail/View Layout, Accounts was added to our Data Label name.

This is the data label we created in Section B. We created label called Mortgage Type.

10. Select the Data Field from the drop down list. Again this is the data name we created called Mortgage Type.
11. Select the List Name from the drop down. This is the drop down list we created in Section A. (Mortgage Type). **Select this field** only is this new data field is a list box.

NOTE: You may have to review the items in the drop down list for # 9 and #10 carefully due to the size of the list.

12. **Click Save.**
13. **The Field Layout Screen displays** displaying your new field.
14. **Click Save** again at the Field Layout Screen. If you fail to save at the above screen, your new label will **NOT** be displayed.

14

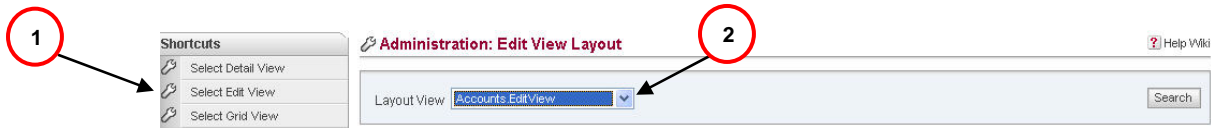
	Save	Cancel	Create	Restore Defaults				
0	↑↓↔↻	Accounts.LBL_ACCOUNT_NAME	NAME	1	↑↓↔↻	Accounts.LBL_PHONE		
2	↑↓↔↻	Accounts.LBL_WEBSITE	WEBSITE	3	↑↓↔↻	Accounts.LBL_FAX		
4	↑↓↔↻	Accounts.LBL_TICKER_SYMBOL	TICKER_SYMBOL	5	↑↓↔↻	Accounts.LBL_OTHER_PHONE		
6	↑↓↔↻	Accounts.LBL_MEMBER_OF	PARENT_NAME	7	↑↓↔↻	Accounts.LBL_EMAIL		
8	↑↓↔↻	Accounts.LBL_EMPLOYEES	EMPLOYEES	9	↑↓↔↻	Accounts.LBL_OTHER_EMAIL_ADDRESS		
10	↑↓↔↻	Accounts.LBL_OWNERSHIP	OWNERSHIP	11	↑↓↔↻	Accounts.LBL_RATING		
12	↑↓↔↻	Accounts.LBL_INDUSTRY	INDUSTRY	13	↑↓↔↻	Accounts.LBL_SIC_CODE		
14	↑↓↔↻	Accounts.LBL_TYPE	ACCOUNT_TYPE	15	↑↓↔↻	Accounts.LBL_ANNUAL_REVENUE		
16	↑↓↔↻	Teams.LBL_TEAM	TEAM_NAME	17	↑↓↔↻	.LBL_DATE_MODIFIED		
18	↑↓↔↻	.LBL_ASSIGNED_TO	ASSIGNED_TO	19	↑↓↔↻	.LBL_DATE_ENTERED		
20	↑↓↔↻	Accounts.LBL_BILLING_ADDRESS	BILLING_ADDRESS_HTML	21	↑↓↔↻	Accounts.LBL_SHIPPING_ADDRESS		
22	↑↓↔↻	Accounts.LBL_DESCRIPTION	DESCRIPTION					
23	↑↓↔↻	Accounts.Mortgage_Type_c	MORTGAGE_TYPE_C					

New Mortgage Type Field displayed in the Detail View Screen

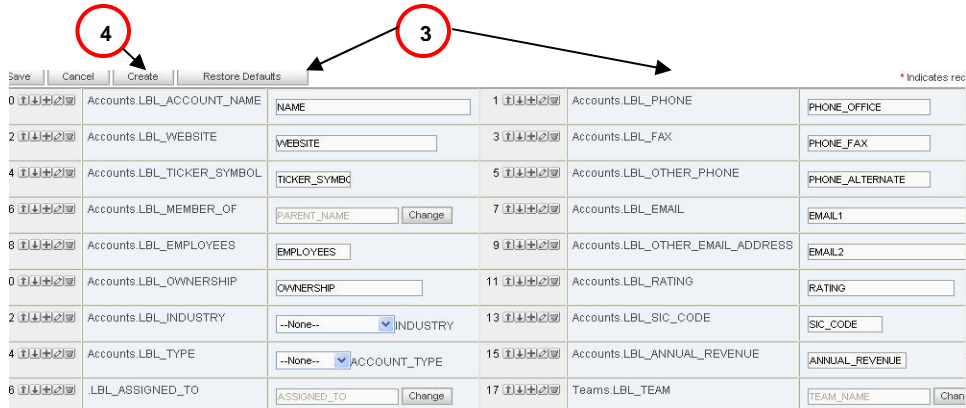
D. Need to Edit the New Field Layout to add the new label, drop down list, etc.

Follow these steps to have the new label/drop visible and selectable in the Edit View mode.

- 1. Click Edit Detail View** from Shortcuts Menu
- 2. Select Accounts.EditView** from the Layout View drop down list or whatever view you want to edit. You would select whichever module you chose to add the new label to. For documentation purposes, we selected Account:Edit/View.



- 3. The Edit View Layout screen displays.**
- 4. Click Create**



NOTE: This looks very similar to the Steps 6-12 in Step C, but this is the Edit View Layout as opposed to the Detail View Layout.

D. Need to Edit the New Field Layout to add the new label, drop down list, etc. (Continued):

- 5. **Select Field Type** (i.e. select List Box)
- 6. **Select Data Label** from drop down list (i.e. Customer Status)
- 7. **Select Data Field** from drop down list (i.e. Customer Status)
- 8. **Select List Name.** (If your new label is not a list box, this selection will not be visible.)
- 9. **Click Save**
- 10. **The Screen refreshes** and redisplay the Edit View Detail Screen with your field added. Refer to above figure.
- 11. **Click Save** again at the Edit View Layout screen. Refer to Step 14 in Step C.

- 12. The screen refreshes and displays the module screen with the new label. In the below image, the list box displays showing the items we added to the new list box in step A.

New Mortgage Type Field displayed in the Edit View Layout screen.

0	Accounts.LBL_ACCOUNT_NAME	NAME	1	Accounts.LBL_PHONE	PHO
2	Accounts.LBL_WEBSITE	WEBSITE	3	Accounts.LBL_FAX	PHO
4	Accounts.LBL_TICKER_SYMBOL	TICKER_SYMB	5	Accounts.LBL_OTHER_PHONE	PHO
6	Accounts.LBL_MEMBER_OF	PARENT_NAME	7	Accounts.LBL_EMAIL	EMA
8	Accounts.LBL_EMPLOYEES	EMPLOYEES	9	Accounts.LBL_OTHER_EMAIL_ADDRESS	EMA
10	Accounts.LBL_OWNERSHIP	OWNERSHIP	11	Accounts.LBL_RATING	RATI
12	Accounts.LBL_INDUSTRY	--None--	13	Accounts.LBL_SIC_CODE	SIC_
14	Accounts.LBL_TYPE	--None--	15	Accounts.LBL_ANNUAL_REVENUE	ANN
16	LBL_ASSIGNED_TO	ASSIGNED_TO	17	Teams.LBL_TEAM	TEA
18	Accounts.Mortgage_Type_c	--None--	19	Accounts.Mortgage_c	MOR
20	Accounts.Sum_c	Fixed Adjustable VA FHA Special	21	Accounts.Interger_c	INTE

- 13. Click Save. (If you fail to click save at this view, your new field will NOT be displayed in the Edit Mode.)

E. Utilizing the new Label/Field:

NOTE: You need to edit your modules fields in order to utilize the new label/field.

For documentation purposes, we will select the Accounts Module since this is where we added our new label/field. You would select the module, within your CRM, where you added your new label/field.

1. **Click the Module tab** that contains the new label/field. (In this case, we would click the Accounts Module tab.)
2. **Select an Account** (or item from module you selected)
3. **Click Edit**
4. Locate the new label/field
5. **Enter the data** in the new label/field. In the example we would select an item from the new Mortgage Type drop down list.
6. **Click Save.**
7. **Repeat Steps** until all items have been updated.

The screenshot shows the 'Account Information' form in a CRM system. At the top, there are 'Save' and 'Cancel' buttons. A red asterisk indicates required fields. The form is divided into two columns. The left column contains fields for Account Name (filled with 'House of Plants'), Website, Ticker Symbol, Member of, Employees, Ownership, Industry (dropdown set to 'Apparel'), Type (dropdown set to 'Analyst'), Assigned to (filled with 'admin'), and Mortgage Type (dropdown menu open showing options: Fixed, --None--, Adjustable, VA, FHA, Special). The right column contains fields for Phone (filled with '+1 (813) 234-8831'), Fax (filled with '(813) 238-9527'), Other Phone, Email, Other Email, Rating, SIC Code, Annual Revenue, Team, Mortgage, and Interger. A 'Change' button is next to the Assigned to field. Two black arrows point to the 'Save' button and the 'Mortgage Type' dropdown menu.

NOTE: To create a new item, such as an account:

1. Click on Module tab
2. Click on Create from Shortcuts
3. Enter all information
4. Click Save.