The Right Technology, the Right Results

CRM – Creating Custom Fields Quick User Guide

Training Services Promero

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**

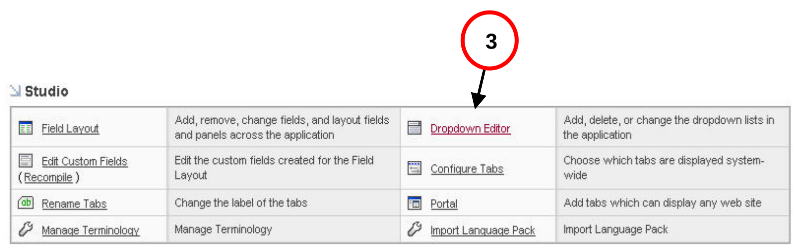
Creating Customized Fields, Labels and Drop Down Lists in the CRM

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.

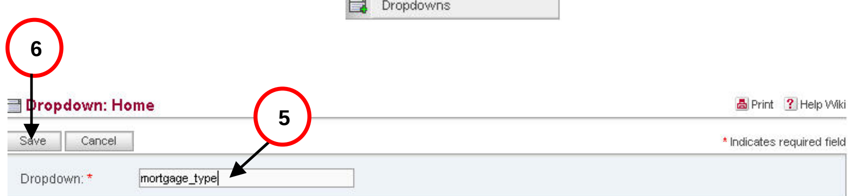
A. Creating a Drop Down List:

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.



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.**

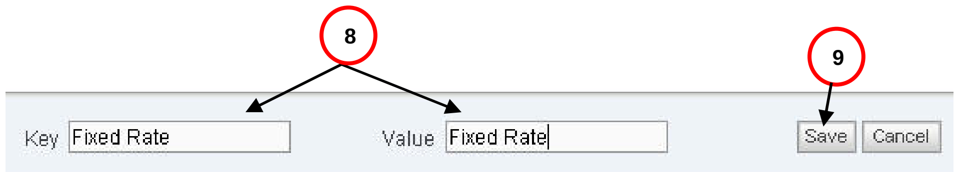
6. **Click Save.**

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

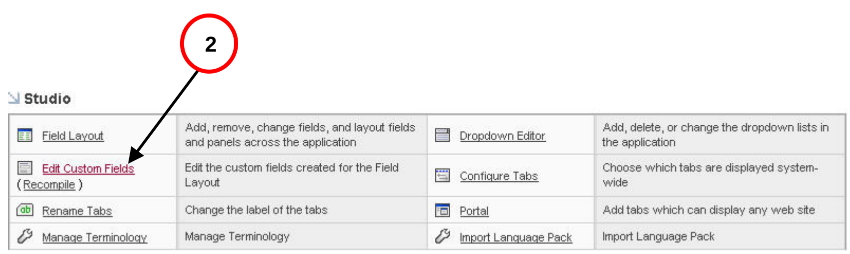


10. Repeat steps 7 through 9 until you have added all entries into your drop down list.
11. Edit your new drop down list and delete the top row entry which is blank entry.
12. Click Save.

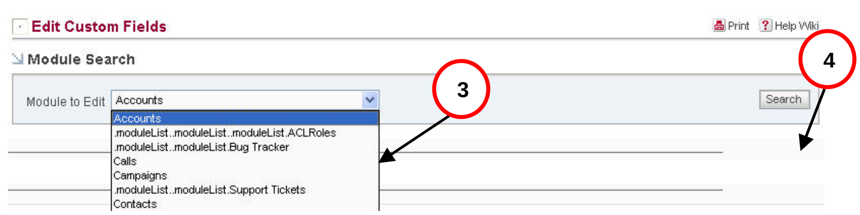
B. Creating Custom Fields:

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.

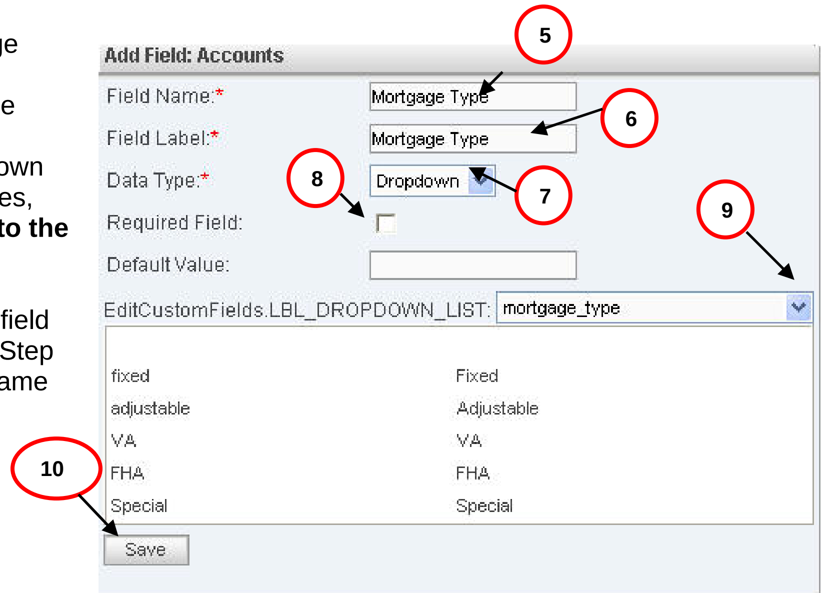


3. Select the Module to edit from the Module Select drop down list. (For documentation purposes, we selected Accounts.)
4. Click Search.



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.

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

Integer - Defines a whole number field.

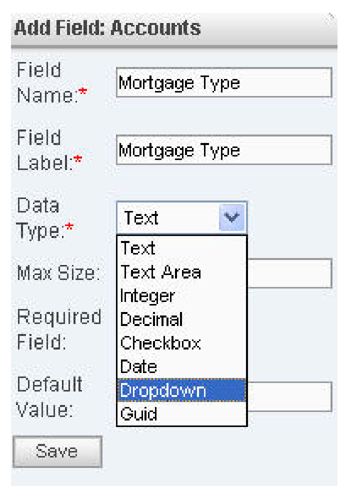
Decimal - This is not a whole number field.

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.

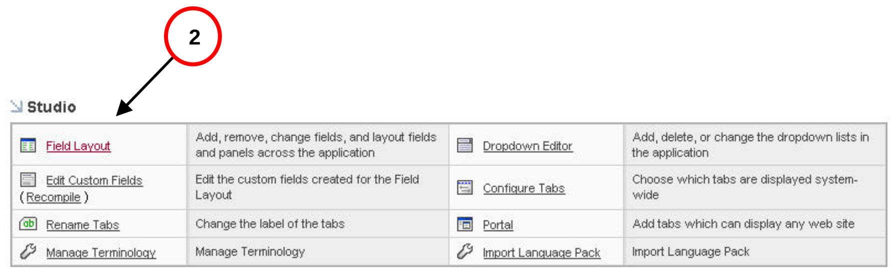


C. Creating a New Label Name:

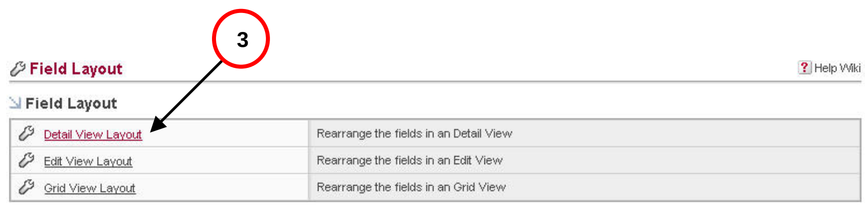
This section will walk you through creating a new label for the control such as text box, list box, button, etc. This will be the name displayed to the users.

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.

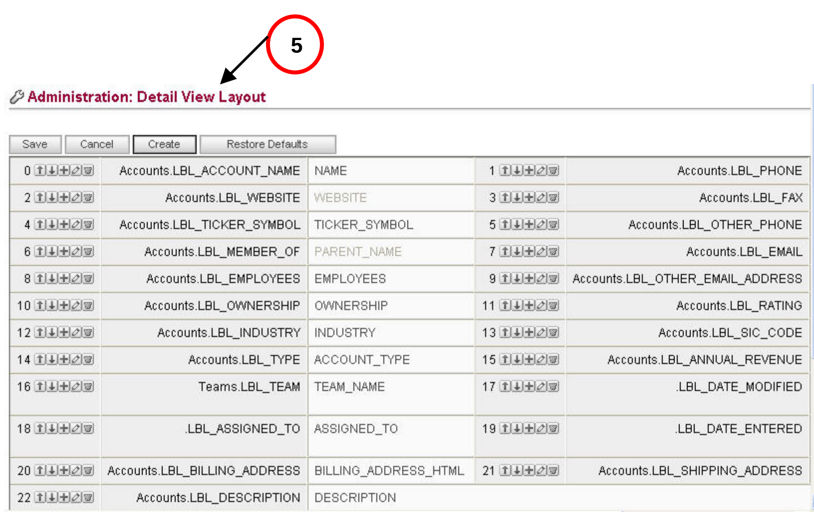


3. **Click Detail View Layout**.

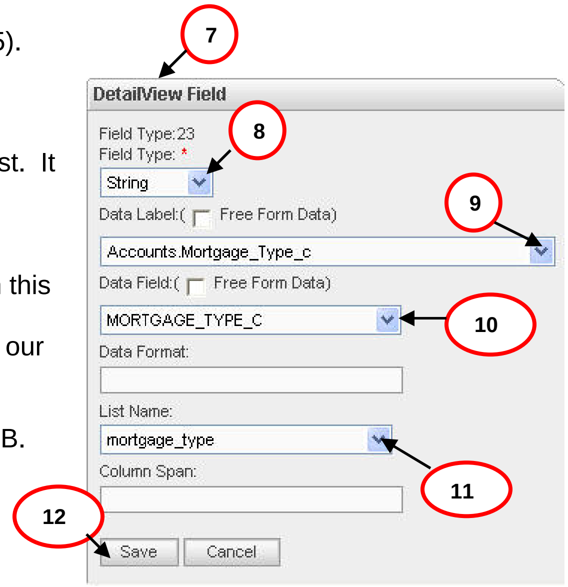


4. **Select the view layout** you wish to edit (For documentation purposes, we select Accounts Detail/View.

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.

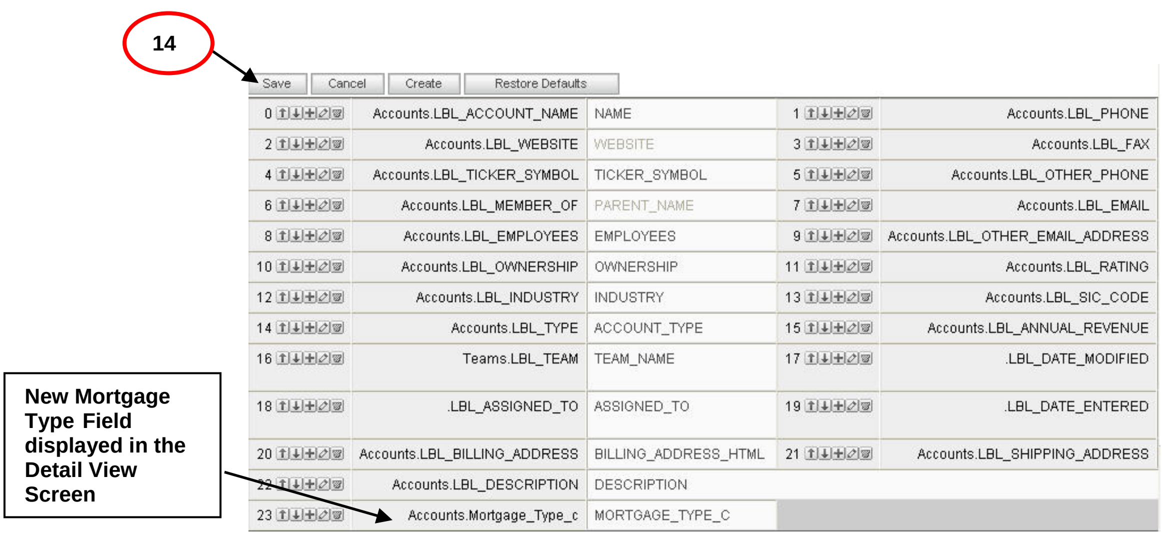
10. Select the Data Field from the drop down lsit. Again this is the data name we created called Mortgage Type.
11. Select the List Name from the drop down. This is the drop down list we created in Section A. (Mortgage Type). **Select this field** only is this new data field is a list box.

    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.

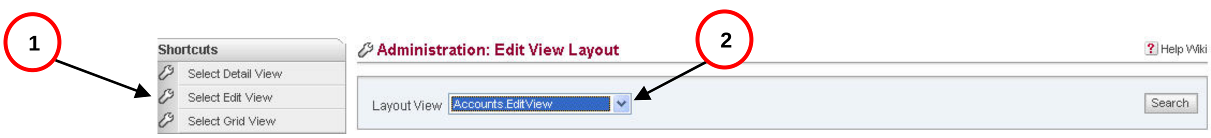
14. **Click Save** again at the Field Layout Screen. If you fail to save at the above screen, your new label will **NOT** be displayed.



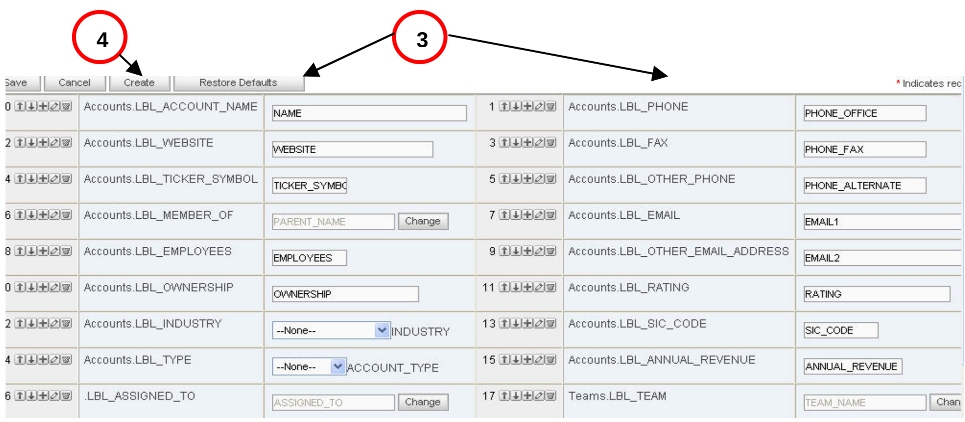
D. Need to Edit the New Field Layout to add the new label, drop down list, etc.

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.



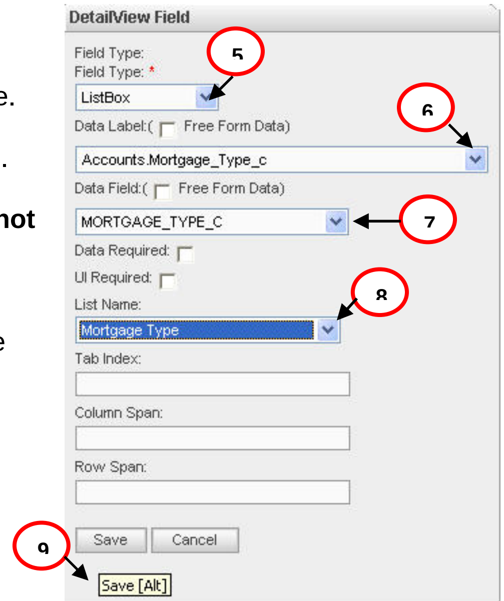
3. The Edit View Layout screen displays.
4. **Click Create**



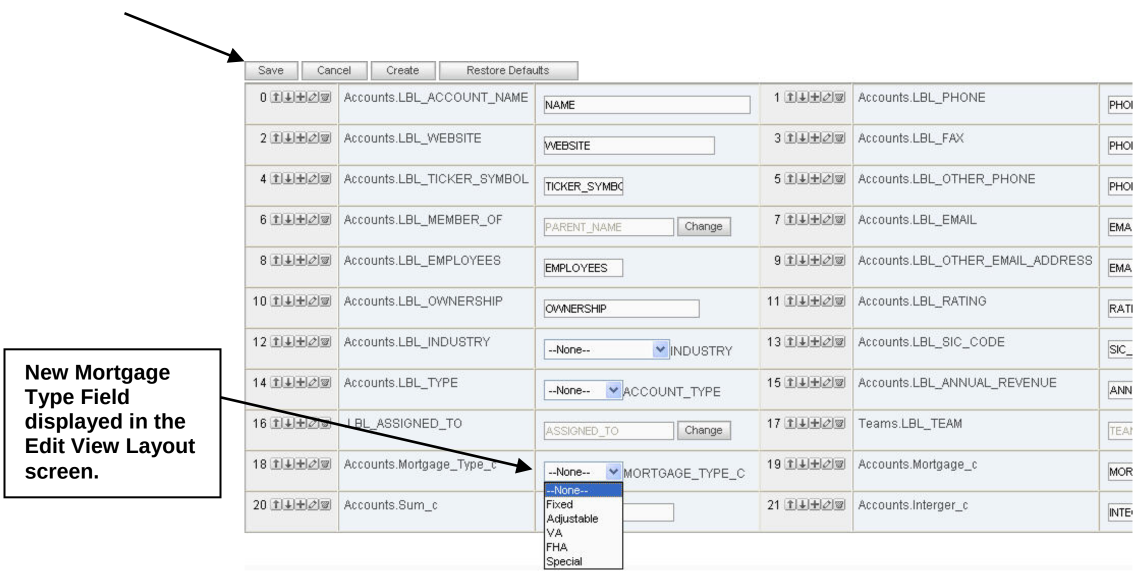
NOTE: This looks very similar to the Steps 6-12 in Step C, but this is the Edit View Layout as opposed to the Detail View Layout.

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 redisplays 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.



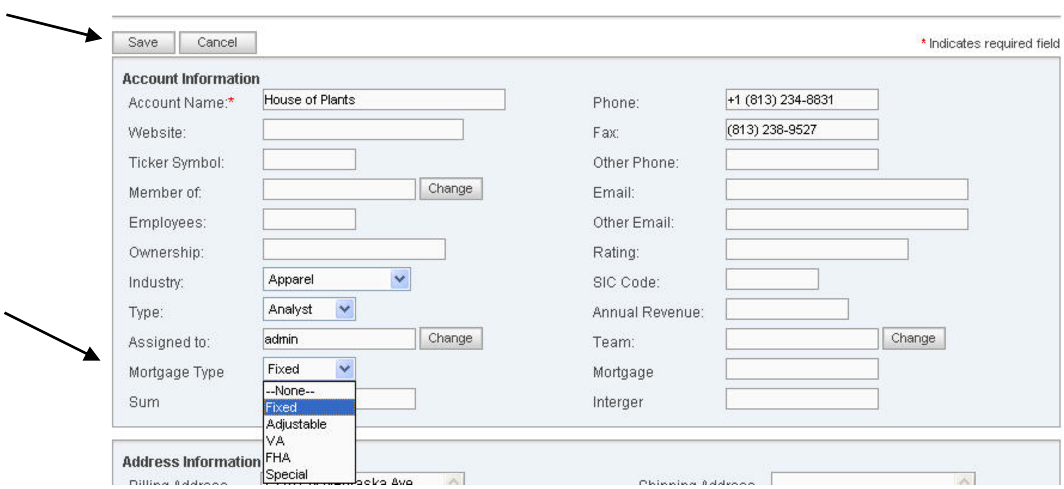
13. Click Save. (If you fail to click save at this view, your new field will NOT be displayed in the Edit Mode.

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.



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.