

Creating/Editing CRM Fields, Views, and Layouts

2016 - Autumn Edition

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Overview

How to **create new records** in the **CRM**, and **edit existing records** with **new/updated data**.

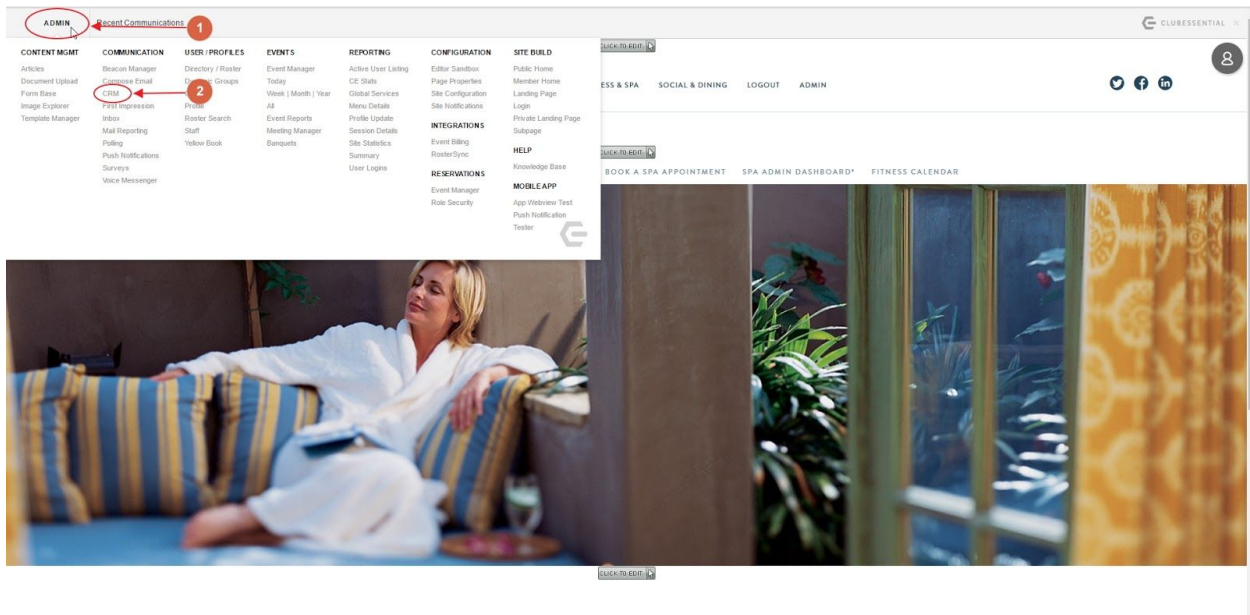
Use Case

A **CRM Record** is a collection of data from related **fields** from within the same **object**. The most common example of a record is a single **Contact**. This contact record contains various fields, housing specific data pertaining to that contact.

However, **CRM Records** are not limited to just **Contacts**. Often, you may need to create **Activities, Notes, Event Opportunities ...** the list goes on!

Accessing the Tool

To access your **CRM**, sign in to your **member website** as an **Administrator**. Then, **hover** over the **Admin toolbar** in the top, left-hand corner of the page. The **CRM link** should appear in either the **Communication** or **Content Management** section, sometimes titled **CRM & Data Warehouse**.



The information covered in this section is mostly found in the **Admin Dashboard** of the **CRM**. To access this, while on the **main CRM Dashboard (above)**, **hover** over your **name** in the **top, right-hand corner** of the **CRM**, and **click** the **Setup** option.

Grand Key Club CRM

Membership Prospects Private Event Prospects Activities Our Members Our Guests

System User

Setup 2

View Compact Normal

Impersonate User

Logout

Grand Key Club Membership Prospects

	Prospect	Qualification	Expected Close Month	Membership Interest	Amenities Interest	Lead Source	Referred By	Email	
EDIT DELETE	Parsons, Kim								11/22/2016
EDIT DELETE	.								11/22/2016
EDIT DELETE	Smith, Joseph	A	2017	Social	Dining, Golf	Website Form		JSmith@gmail.com	11/9/2016
EDIT DELETE	Pitcher, Kurt	B	December '16	Social	Biking, Golf, Tennis	Website Form		KP@TCGCC.com	10/4/2016
EDIT DELETE	Coffey, Rick	A	December '16	Junior Golf	Fitness, Golf, Kids Events	Internet Search		rickcoffeycmp@gmail.com	9/13/2016
EDIT DELETE	VanderVeen, Diane	B	November '16	Social	Golf, Tennis	Website Form		DVV@tcclub.com	8/30/2016
EDIT DELETE	Khaliqov, Victoria	B	November '16	Social	Dining, Fitness, Golf, Kayaking	Website Form	Smith, Bradley	victoriakhaliqov@traditiongpc.com	8/1/2016
EDIT DELETE	Campos, Jamie	B	November '16	Social	Dining, Kayaking, Swimming, Tennis	Website Form		jami@awesom.net	7/28/2016
EDIT DELETE	Lina, Susan	A	November '16	Regular Golf	Fitness, Golf, Kayaking, Tennis	Website Form	Aaron, Alan	sl@gmail.com	7/28/2016
EDIT DELETE	Daug, Josie	C	Not Determined	Regular Golf	Dining, Golf, Swimming, Tennis	Website Form		jd@gmail.com	7/28/2016
EDIT DELETE	Zak, Stacy	A	November '16	Social	Dining, Golf, Kids Events	Other	Larabee, Zach	szak@clubessential.com	5/13/2016
EDIT DELETE	Bennett, Brian	A	2017	Social	Dining	Social Media	Wilson, John	brian.bennett@aol.com	4/28/2016
EDIT DELETE	Anderson, JJ	A	December '16	Junior Golf	Fitness, Golf	Email In	Adkins, William A	jj@taco.com	4/28/2016
EDIT DELETE	Patterson, Greg	C	2017	Social	Biking, Dining, Kayaking, Spinning	Website Form		greg@yahoo.com	3/24/2016
EDIT DELETE	McDonald, Ray	A	December '16	Regular Golf	Dining, Golf	Member Referral	Aaron, Duane	rmcd@ce.com	3/1/2016
EDIT DELETE	Lawrence, Jennifer	A	November '16	Junior Golf	Biking, Golf, Kids Events	Website Form	Aaron, Duane	jennifer.lawrence@yahoo.com	2/23/2016
EDIT DELETE	Williams, Leslie	B	2017	Regular Golf	Biking, Golf	Direct Mail	Dinimoor, Brooke	lesismore@att.net	2/18/2016
EDIT DELETE	Lawson, Tim	A	2017	Junior Golf	Kids Events, Social Events	Walk In		tim.lawson@clubtech.com	2/18/2016
EDIT DELETE	Nixon, Richard	C	2017	Regular Golf	Biking	Website Form		Richard@whitehouse.gov	2/3/2016
EDIT DELETE	Underwood, Kristi	B	December '16	Social	Dining, Fitness	Email In		ku@byc.com	12/22/2015

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From here, you will see the **CRM Admin Dashboard**, which looks similar to the **CRM Home Dashboard**, but with a different sidebar on the left, and no Application Links at the top.

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Grand Key Club Membership Prospects

	Prospect	Qualification	Expected Close Month	Membership Interest	Amenities Interest	Lead Source	Referred By	Email	Created
EDIT DELETE	Parsons, Kim								11/22/2016 12
EDIT DELETE	.								11/22/2016 9
EDIT DELETE	Smith, Joseph	A	2017	Social	Dining, Golf	Website Form		JSmith@gmail.com	11/9/2016 2:9
EDIT DELETE	Pitcher, Kurt	B	December '16	Social	Biking, Golf, Tennis	Website Form		KP@TCGCC.com	10/4/2016 1:4
EDIT DELETE	Coffey, Rick	A	December '16	Junior Golf	Fitness, Golf, Kids Events	Internet Search		rickcoffeycmp@gmail.com	9/13/2016 1:3
EDIT DELETE	VanderVeen, Diane	B	November '16	Social	Golf, Tennis	Website Form		DVV@tcclub.com	8/30/2016 2:3
EDIT DELETE	Khaliqov, Victoria	B	November '16	Social	Dining, Fitness, Golf, Kayaking	Website Form	Smith, Bradley	victoriakhaliqov@traditiongpc.com	8/1/2016 4:0
EDIT DELETE	Campos, Jamie	B	November '16	Social	Dining, Kayaking, Swimming, Tennis	Website Form		jami@awesom.net	7/28/2016 2:5
EDIT DELETE	Lina, Susan	A	November '16	Regular Golf	Fitness, Golf, Kayaking, Tennis	Website Form	Aaron, Alan	sl@gmail.com	7/28/2016 9:4
EDIT DELETE	Daug, Josie	C	Not Determined	Regular Golf	Dining, Golf, Swimming, Tennis	Website Form		jd@gmail.com	7/28/2016 9:2
EDIT DELETE	Zak, Stacy	A	November '16	Social	Dining, Golf, Kids Events	Other	Larabee, Zach	szak@clubessential.com	5/13/2016 10
EDIT DELETE	Bennett, Brian	A	2017	Social	Dining	Social Media	Wilson, John	brian.bennett@aol.com	4/28/2016 1:3
EDIT DELETE	Anderson, JJ	A	December '16	Junior Golf	Fitness, Golf	Email In	Adkins, William A	jj@taco.com	4/28/2016 1:2
EDIT DELETE	Patterson, Greg	C	2017	Social	Biking, Dining, Kayaking, Spinning	Website Form		greg@yahoo.com	3/24/2016 1:3
EDIT DELETE	McDonald, Ray	A	December '16	Regular Golf	Dining, Golf	Member Referral	Aaron, Duane	rmcd@ce.com	3/1/2016 10:1
EDIT DELETE	Lawrence, Jennifer	A	November '16	Junior Golf	Biking, Golf, Kids Events	Website Form	Aaron, Duane	jennifer.lawrence@yahoo.com	2/23/2016 10
EDIT DELETE	Williams, Leslie	B	2017	Regular Golf	Biking, Golf	Direct Mail	Dinimoor, Brooke	lesismore@att.net	2/18/2016 4:4
EDIT DELETE	Lawson, Tim	A	2017	Junior Golf	Kids Events, Social Events	Walk In		tim.lawson@clubtech.com	2/18/2016 4:3
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Editing Fields/Views/Layouts

As an administrative **CRM User**, you have access to almost all of the editable settings within your **CRM**. This includes **creating new fields, adjusting the fields visible in a given View/Layout, and editing the values within an existing picklist field**, among many other permissions.

Adding/Editing Fields

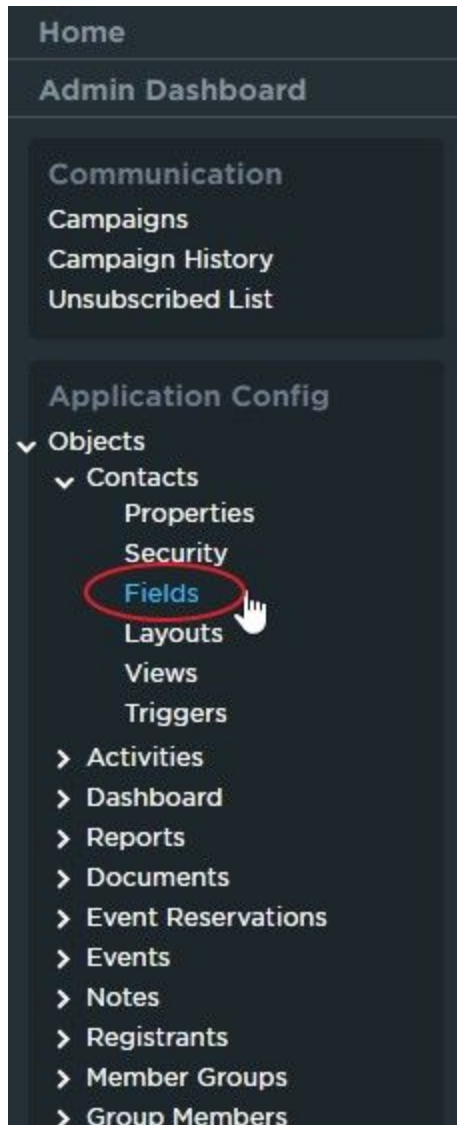
Your **CRM** should already include many different fields, containing a variety of different types of data. However, often you may need to begin storing a new piece of data that does not already have a corresponding field in the **CRM**, or you may need to edit the list of values available to choose from in a **Picklist field**.

Adding a new Field

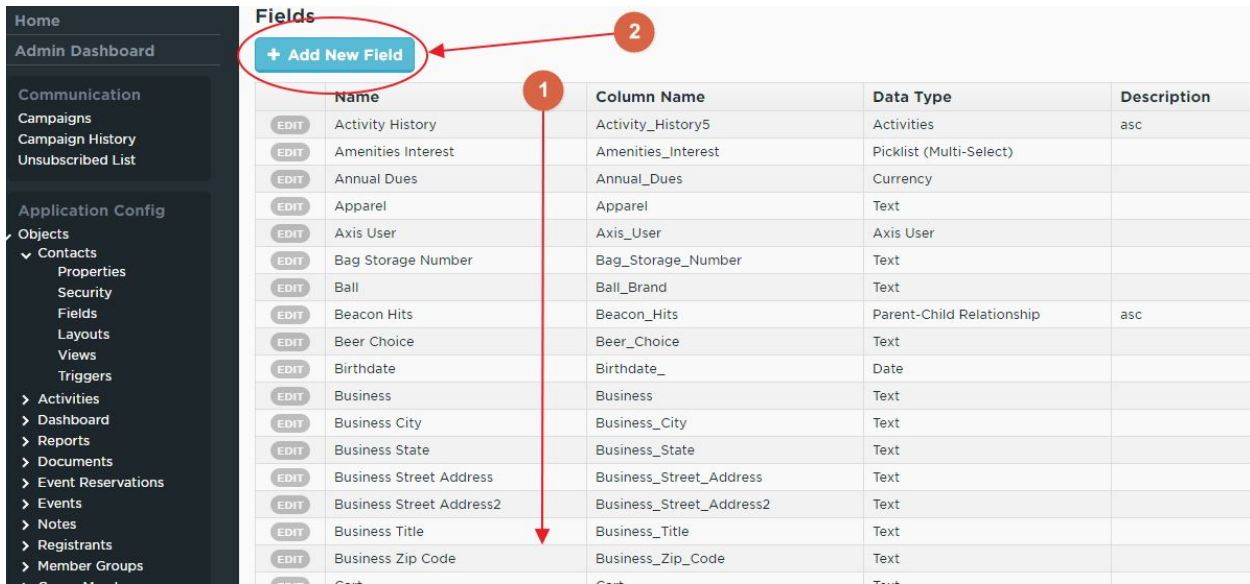
To begin, you'll need to first decide what **Object** your new field will reside in - that is, what is it that this field will be helping to describe? The most commonly used **Object** in **CRM** is **Contacts Object**. **All fields** in the **Contacts Object** should be used to directly describe a person, whether they are a **Member, Prospective Member, Guest, or other**. In this example, the field we are adding is "Beverage Preference", which will allow us to choose which beverage this Member prefers when they dine. This field would most accurately describe a **Contact**, so we will create this new field in the **Contacts Object**.

To **create your field**, you'll first need to access the **Admin Dashboard**. To do this, first start at your **CRM home screen**, then **hover** the mouse **over your name** in the **top right corner**, and **click** the **Setup** option.

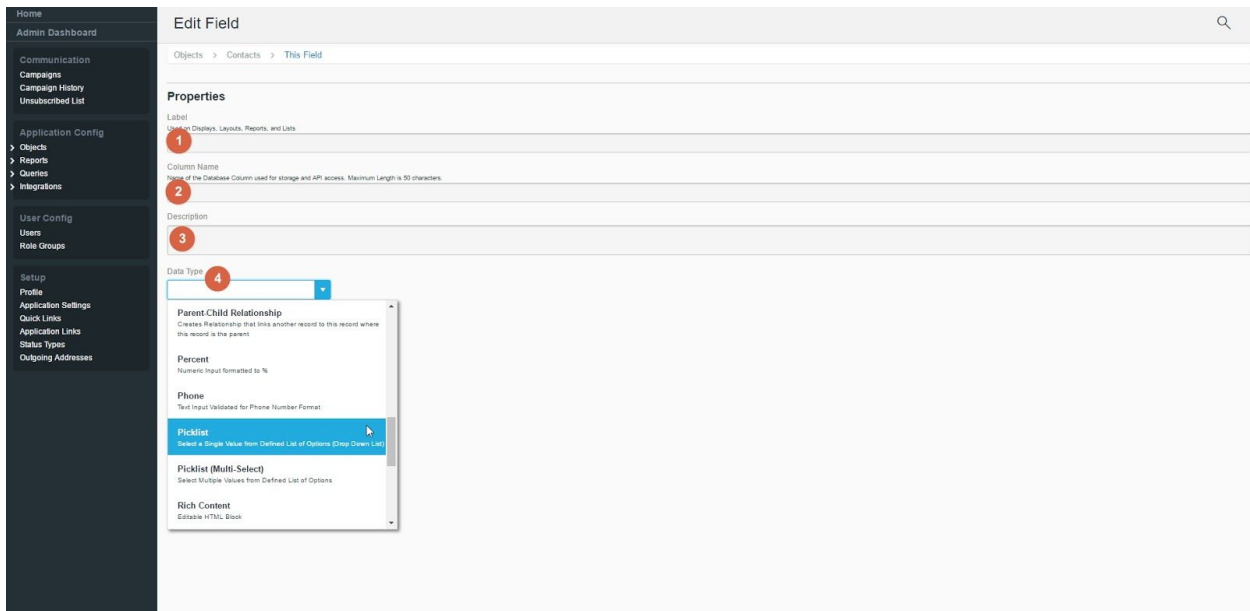
To **add your new field** from here, you'll first need to **open** your **Contacts Object** for editing. From the **left-hand sidebar**, **click** on **Options** to **expand the list** and **display all** of the **Objects** present in your **CRM**. **Contacts** should almost always be the **first Object listed**. **Click Contacts** to **expand** the **list** further, and then **click Fields** to **view** the **list** of existing **Fields for the Contacts Object**.



Before adding in your new field, scroll through this list to see if it already exists. If it does, then you can skip ahead to either **Editing a Layout** or **Editing a View** to add this field where needed. If it does not already exist, then navigate to the top of the list of fields, and **click** on the **blue button** titled **+ Add New Field**.



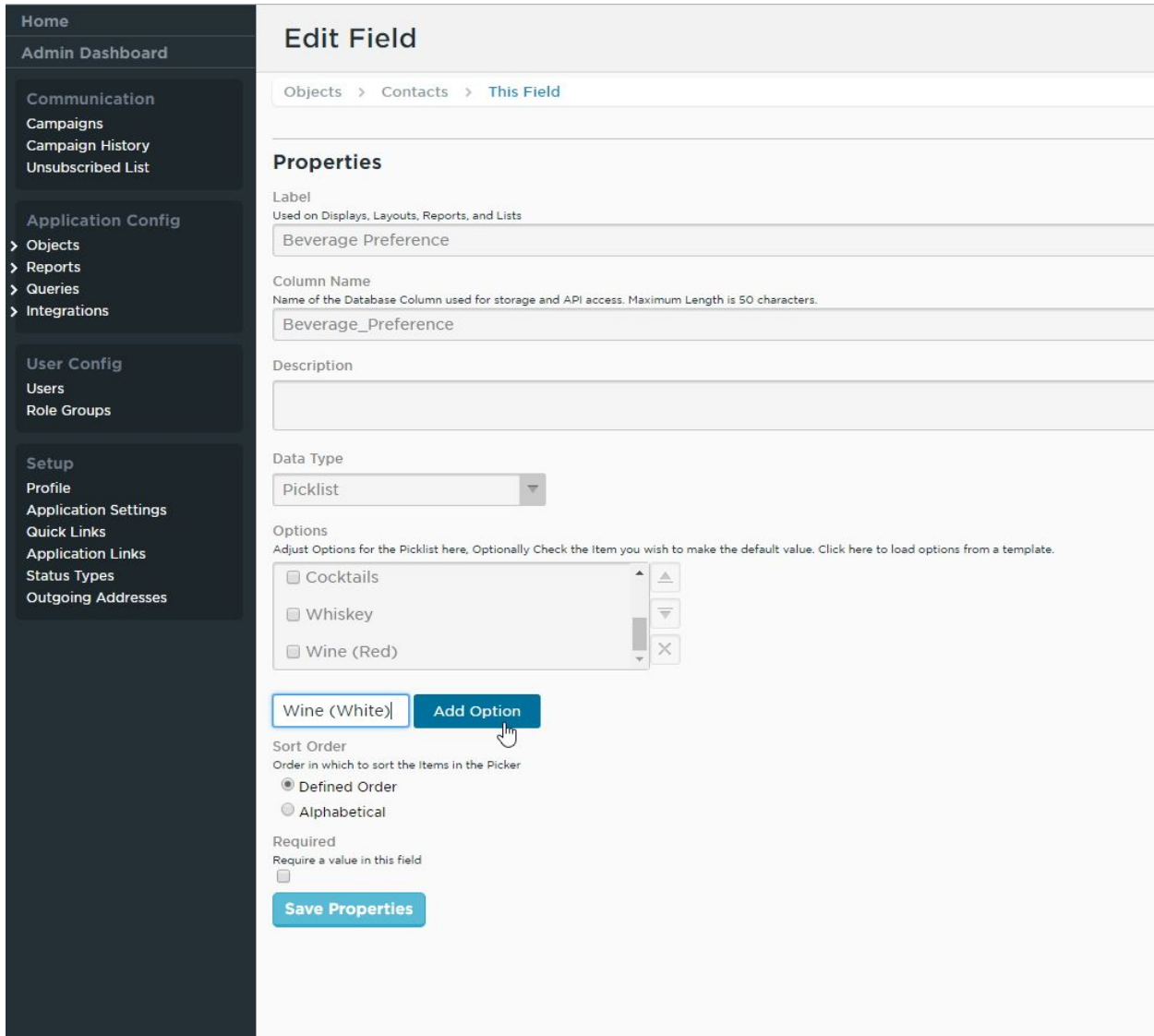
Once you **click** on the **+ Add New Field** button, you should see a list of **blank field properties**:



1. **Label:** This is the field name, as it will display across the CRM. When choosing a name, be descriptive, but concise. Ex: Application Date
2. **Column Name:** This is the database name of the field you are creating. This should automatically generate once you click out of the Label field. In most cases, it is best to leave this as the default value.

3. **Description:** An optional field that allows you to enter a longer description of the field you are creating. This will only be seen in the full list of fields for the corresponding Object. Typically, if your Label is descriptive enough, this can be left blank.
4. **Data Type:** Choose the type of data that will be accepted in this field. There are many options, but the most commonly used are:
 - a. Checkbox: Sets this field as a checkbox, which can either be checked (true) or unchecked (false).
 - b. Currency: Sets this field as a number, formatted for currency. Useful for tracking different revenue streams, and automatically appends the \$ sign and decimal when entering data.
 - c. Date: Sets this field as a date, with no time value. Brings up a datepicker when entering data.
 - d. Date/Time: Sets this field as a date with the time appended. Brings up a datepicker with time selector when entering data.
 - e. Email: Sets this field as a text box with forced formatting for email addresses. Fields of this data type can be used as targets for Campaigns, or can be used to directly send emails from a View/Layout.
 - f. Number: Sets this field as a number, and allows you to configure the allowable size of number (in digits) and number of decimal places allowed.
 - g. Picklist: Sets up a dropdown list of options to choose from, of which only one option can be selected.
 - h. Picklist (Multi-Select): Sets up a list of checkboxes, representing options, from which multiple values can be selected.
 - i. Text: A standard text box, with no formatting applied. Useful for displaying short pieces of basic information, such as names, addresses, phone numbers, etc. Allows you to set the maximum number of characters that can be entered, and whether or not all values in this field must be unique across the entire Object.
 - j. Text Area: A larger text box, with no formatting applied. Allows you to set the maximum number of characters that can be entered.

For our example, we'll choose the **Picklist option**, which will allow us to choose from a list of options (that will be populated now) when filling in this data on **Member records** later on. Once you select **Picklist** from the **Data Type drop-down**, the screen will reload and some new options will appear below.

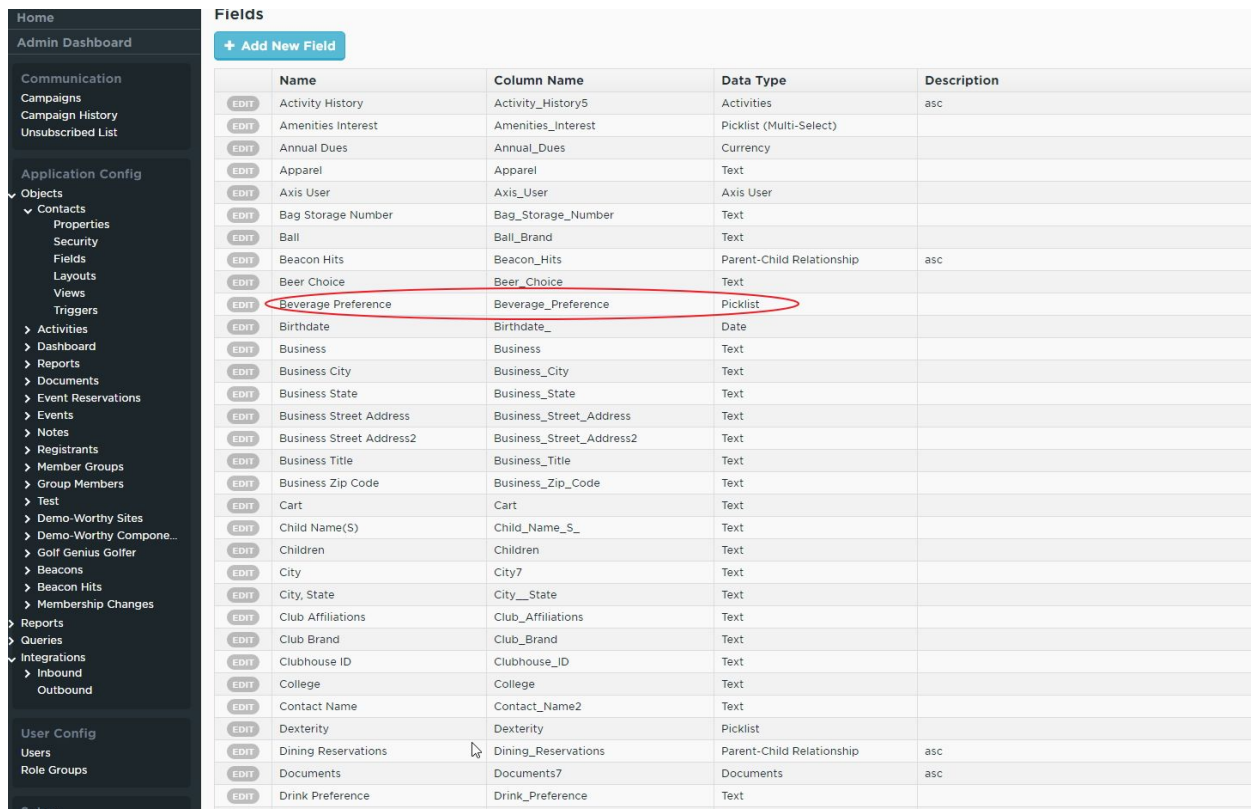


To begin, the **list of drop-down option** to choose from will be blank, so we will need to populate those options. To do this, **click inside the text box** next to the **blue button titled Add Option** and **type the name of the option** that you would like to **add**. Once complete, **click the Add Option** button, and your **option will appear in the box above**. **Repeat this process as needed** until all the necessary options have been added. You can **reorder the list** by **clicking** on an **option**, and then using the **Up or Down Arrow buttons** to the right of the options box to **move that option up or down in the list**. You can **remove options** by **clicking** on the **option to remove**, and **clicking** on the **“X” icon** just under the **Up/Down Arrows**.

There are two more **Field settings** available before the **Save** button. Choose whether to sort the options in the order they appear in the listing you just created (default), or to sort all the options alphabetically, regardless of how they were entered.

Finally, **choose whether this field should be required**. If the field is marked as required, any record that is created or edited in this **Object** will not save until a value is entered for this field. It is recommended to only use this for fields that would appear to all types of records within this **Object** (in our example, the Contacts Object). Therefore, making the *Member Number* field required would not be recommended, as all Prospects, Guests, Realtors, etc. do not have a Member Number, and you would not be able to save a new Prospect (or similar) record until a Member Number was entered. However, the **Primary Email Field** may be good to set as **required**, if you are certain that you will be able to fill this in for each contact that you enter.

Once you have completed the steps above, **click the blue button at the bottom of the page titled *Save Properties***, and your **field** will be **created**.



	Name	Column Name	Data Type	Description
	Activity History	Activity_History5	Activities	asc
	Amenities Interest	Amenities_Interest	Picklist (Multi-Select)	
	Annual Dues	Annual_Dues	Currency	
	Apparel	Apparel	Text	
	Axis User	Axis_User	Axis User	
	Bag Storage Number	Bag_Storage_Number	Text	
	Ball	Ball_Brand	Text	
	Beacon Hits	Beacon_Hits	Parent-Child Relationship	asc
	Beer Choice	Beer_Choice	Text	
	Beverage Preference	Beverage_Preference	Picklist	
	Birthdate	Birthdate_	Date	
	Business	Business	Text	
	Business City	Business_City	Text	
	Business State	Business_State	Text	
	Business Street Address	Business_Street_Address	Text	
	Business Street Address2	Business_Street_Address2	Text	
	Business Title	Business_Title	Text	
	Business Zip Code	Business_Zip_Code	Text	
	Cart	Cart	Text	
	Child Name(S)	Child_Name_5_	Text	
	Children	Children	Text	
	City	City7	Text	
	City, State	City_State	Text	
	Club Affiliations	Club_Affiliations	Text	
	Club Brand	Club_Brand	Text	
	Clubhouse ID	Clubhouse_ID	Text	
	College	College	Text	
	Contact Name	Contact_Name2	Text	
	Dexterity	Dexterity	Picklist	
	Dining Reservations	Dining_Reservations	Parent-Child Relationship	asc
	Documents	Documents7	Documents	asc
	Drink Preference	Drink_Preference	Text	

A **field** does no good if it is not visible, so continue reading to learn how to add this new field into a **View** and **Layout**, so you can both **view** and **edit** the information in this **field** for your **CRM records**.

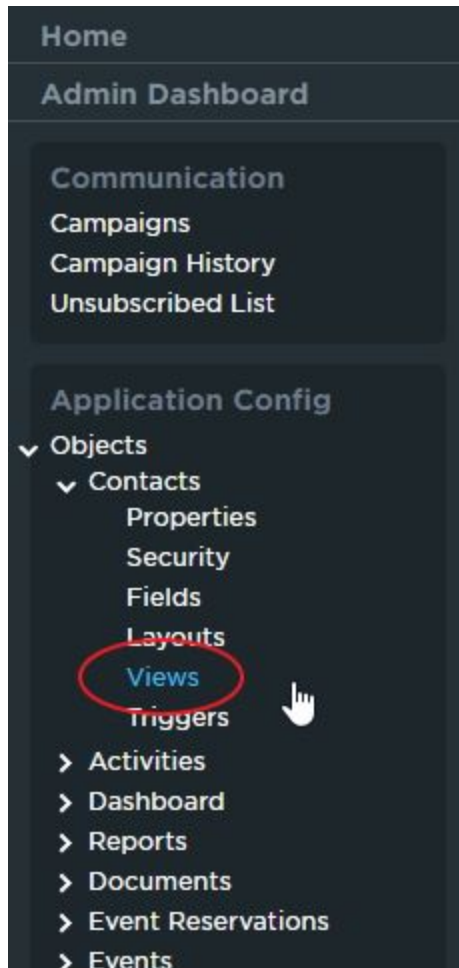
Adding/Editing a CRM View

A **View** in the **CRM** is a screen that displays a high-level overview of a subset of records from within a single **Object** in the **CRM**. Views typically have filters in place that will display only records that meet certain criteria. For example, the “**Our Members**” **View** will display all records in the **Contacts Object** that have a status of “**Member**.” The fields displayed in a view are customizable to match the type of record displayed within. For example, the “**Member Number**” **field** makes sense to **appear** in the “**Our Members**” **View**, but not in the “**Membership Prospects**” **view**.

Adding a new View

To **create your View**, you’ll first need to access the **Admin Dashboard** . Similar to adding Fields, you’ll need to think about which **Object** this **View** will reside in. In this example, we’ll be adding the new **View** “**Real Estate Prospects**” to the **Contacts Object**.

To **add your new View** from here, you’ll first need to open up your **Contacts Object** for editing. From the left-hand sidebar, **click** on **Options** to **expand** the **list** and **display all** of the **Objects** present in your **CRM**. **Contacts** should almost always be the **first Object listed**. **Click** on it to **expand** the **list** further, and then **click** on **Views** to be brought straight to the **Views section** of the **Contacts Object setup screen**.



You should now see a **list of all available Views** within the **Object** you are editing. To **edit an existing View**, **click on the gray *Edit* button** immediately to the **left** of its **name** in the **listing**. To see a live representation of this **View**, **click on the gray *View* button** immediately to the **left to its name in the listing**. To **add a new View**, **click on the large blue button titled *+ Add New View***.

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Group Members
Test
Demo-Worthy Sites
Demo-Worthy Compon...
Golf Genius Golfer
Beacons
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Views

[+ Add New View](#) View Archived Views

Name	Default View	Description
EDIT VIEW Contacts System Default	False	System Created View for 'Contacts' Object
EDIT VIEW Contact View - Grand Key Club	False	
EDIT VIEW Outing Prospects	False	
EDIT VIEW Members	False	
EDIT VIEW New View	False	
EDIT VIEW Related Members	False	
EDIT VIEW Guests	False	
EDIT VIEW Grand Key Club Membership Prospects	True	
EDIT VIEW Private Event Prospects	False	
EDIT VIEW Junior Golf	False	
EDIT VIEW Everyone	False	
EDIT VIEW Membership Opps	False	
EDIT VIEW Golf Shop	False	
EDIT VIEW Event Opps	False	
EDIT VIEW Booked Events	False	
EDIT VIEW Security Gate	False	
EDIT VIEW F&B	False	

Triggers

[+ Add New Trigger](#) View Archived Triggers

Name	Description
EDIT Contact has new beer preference	Send alert to owner if contact has updated beer preference
EDIT Activity for New Prospect	
EDIT Sales Close Date	
EDIT Event Close Date	
EDIT Member Resignation	Creates a Membership Changes record whenever a Member changes status to Former Member
EDIT New Member Created	When a new Member is added, create a Membership Changes object that reflects this.
EDIT New Member Created (isNewRecord)	When a new Member is added, create a Membership Changes object that reflects this.
EDIT Membership Level Updated	When a Member's Membership Level is updated, change the dues, determine if upgrade/downgrade, and write everything to a new Membership Changes record.

You should now see the **Edit View** screen:

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Edit View

Objects > Contacts > This View 🔍

Properties

- Name: Real Estate Prospects
- Description:
- Layout: Prospect Layout
- Object Default:
- Object Display Name: Real Estate Prospect
- Object Display Name Plural: Real Estate Prospects

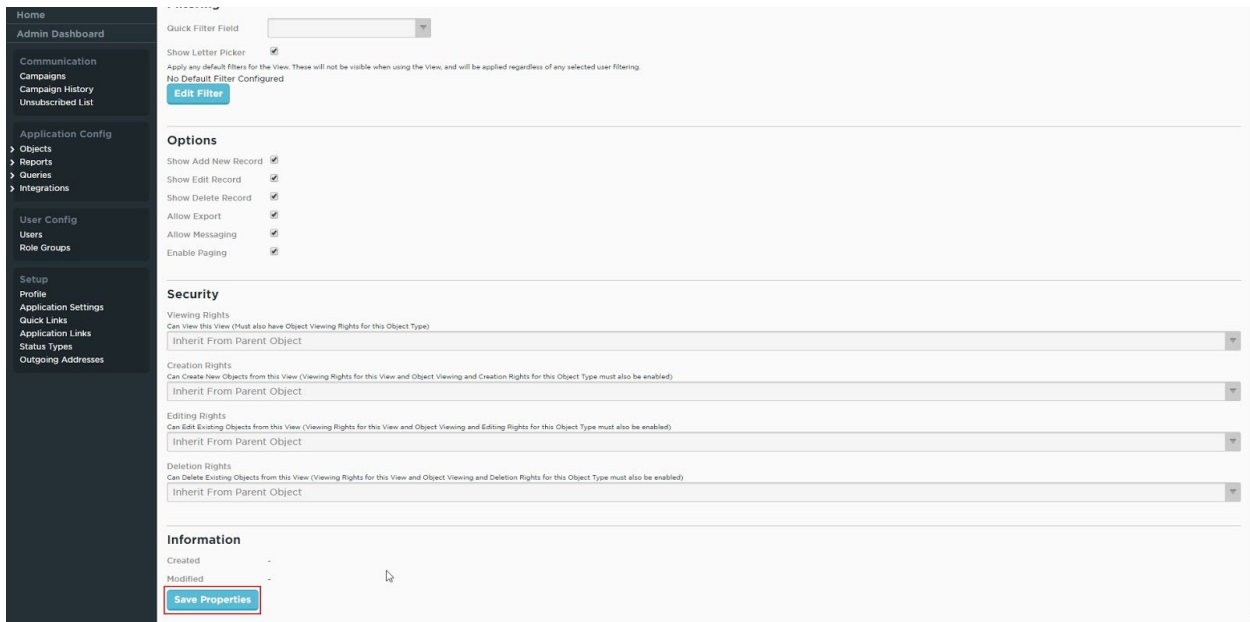
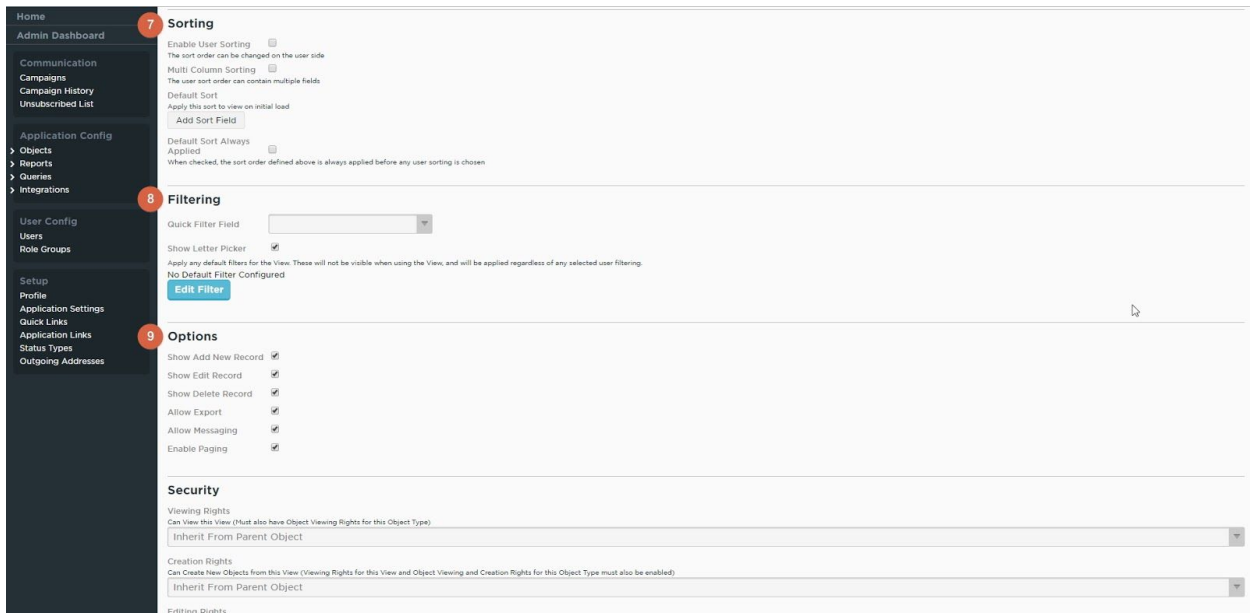
Fields

Column Name	Data Type	Display As	User Filterable	
EDIT REMOVE RecordName	Text		<input type="checkbox"/>	↕
EDIT REMOVE Created	DateTime		<input type="checkbox"/>	↕
EDIT REMOVE Updated	DateTime		<input type="checkbox"/>	↕
ADD NEW				↕

Sorting

Enable User Sorting
The sort order can be changed on the user side

Multi Column Sorting



1. **Name:** Enter a short, descriptive name for this View. Ex: “Real Estate Prospects”
2. **Description:** Optionally, enter a longer description of this View. This would be seen only on the Views overview, and not from the View itself.
3. **Layout:** Select which Layout will be related to this View. Whenever a user clicks to view a record from this View, this is the Layout that will display that record’s information. For example, a new View for “Members” should use the “Members” Layout so that,

when a record is opened from within the new View, the full list of Member information is displayed.

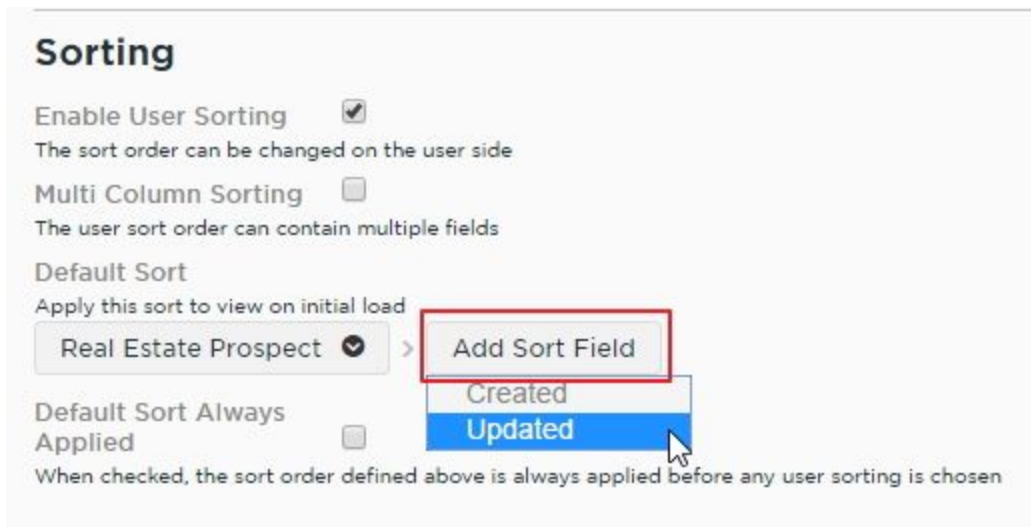
4. **Object Default:** Check this box to make this View the default for this Object. Any reference to this Object that does not point to a specific View will instead show the Object Default View.
5. **Object Display Name:** Dictates how the Object will be referenced from within this View. For example, this changes the verbiage of the *Add New Record* button from within the View. If left blank, the default is set to the Object Name.
6. **Fields:** Lists which Fields are visible within this View. By default the system fields RecordName, Created, and Updated are visible. The order that the fields appear in this list is the same as how they will appear in the View (the top-most field will appear furthest to the left in the View). The options for each row are:
 - a. **Edit:** Allows you to change the value in the *Display As* and *User Filterable* columns for this row.
 - b. **Column Name:** Displays the Column Name of the field that is set to display in the View in this position.
 - c. **Data Type:** Displays the data type of the field that is set to display in the View in this position.
 - d. **Display As:** Allows you to change the verbiage that displays for this field in the View. For example, you could change the wording of the *Updated* field to *Time of Last Update*.
 - e. **User Filterable:** Enables this field to be added to an Advanced Filter in the View, for on-the-fly filtering.
 - f. **Positioning Arrow:** Click and drag this arrow up or down to reorder the fields within the table.

At the bottom of the list of fields is a blue button titled *Add New*. Clicking this button will add a new row to the bottom of the existing list, and allow you to configure a new field in this View.

7. **Sorting:** Allows you to configure the sorting options for records within this View. All sorting can be in either ascending order (lowest to highest) or descending (highest to lowest) order.
 - a. **Enable User Sorting:** Enables users to change the sort order in this View manually by clicking on the column header. Checked by default.
 - b. **Multi Column Sorting:** Enables users to sort this View by multiple columns.

- c. **Default Sort:** Configures the sort order that will be applied to the records within this View by default when it first loads. More details on this below.
- d. **Default Sort Always Applied:** When checked, the default sort order will always apply. Any user sorting (if enabled) will only take place after the default sort. In many cases, this prevents user sorting entirely, so it is recommended not to select this option unless you want to prevent user sorting.

Default Sort: Under the Default Sort option, click on the button titled *Add Sort Field* to configure the default sorting of this View.

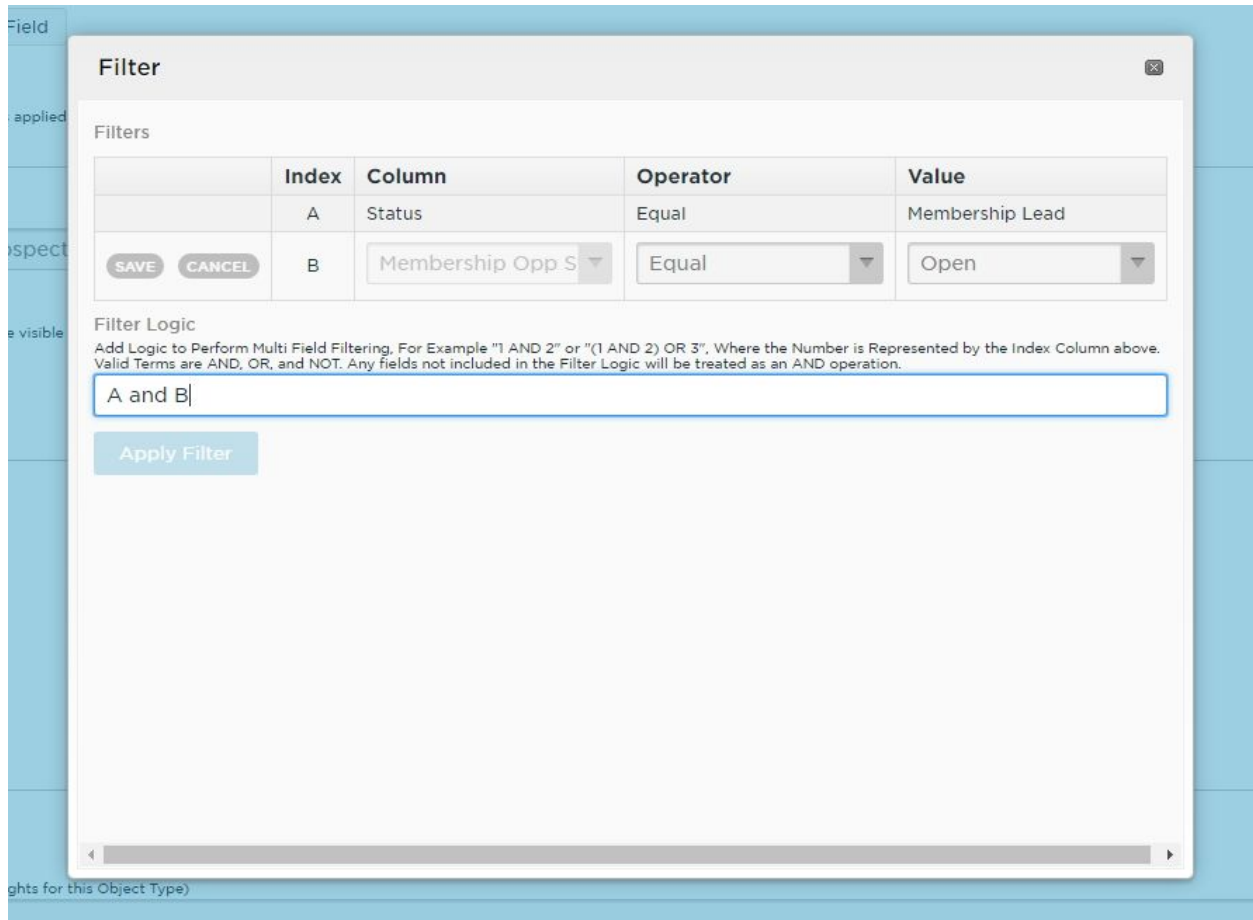


From here, select which field you would like to sort by. The **default sort order** of any given field is **descending (down arrow)**. Click on the **field again to flip the order to ascending (up arrow)**. You can add additional sort fields to do more advanced sorting.

8. Filtering: Configure which field(s) this View uses to filter out records, and therefore which records are displayed in the View.

- A. **Quick Filter Field:** Choose which field(s) will be used in the search field within this View. RecordName is always enabled by default, but you can enable more fields here as needed. For example, in order to search by both Contact Name and Email address, be sure to check the boxes for *RecordName* and *Primary Email* - then the desired search criteria will check both the *RecordName* and *Primary Email* fields for a match.
- B. **Show Letter Picker:** Determines whether the letter picker will display at the bottom of the screen in this View. Checked by default.

C. Default Filter: Configures to default filter for this View, so you can tailor which records will be displayed. Click the blue button titled *Edit Filter* to open a popup window with the filter options:



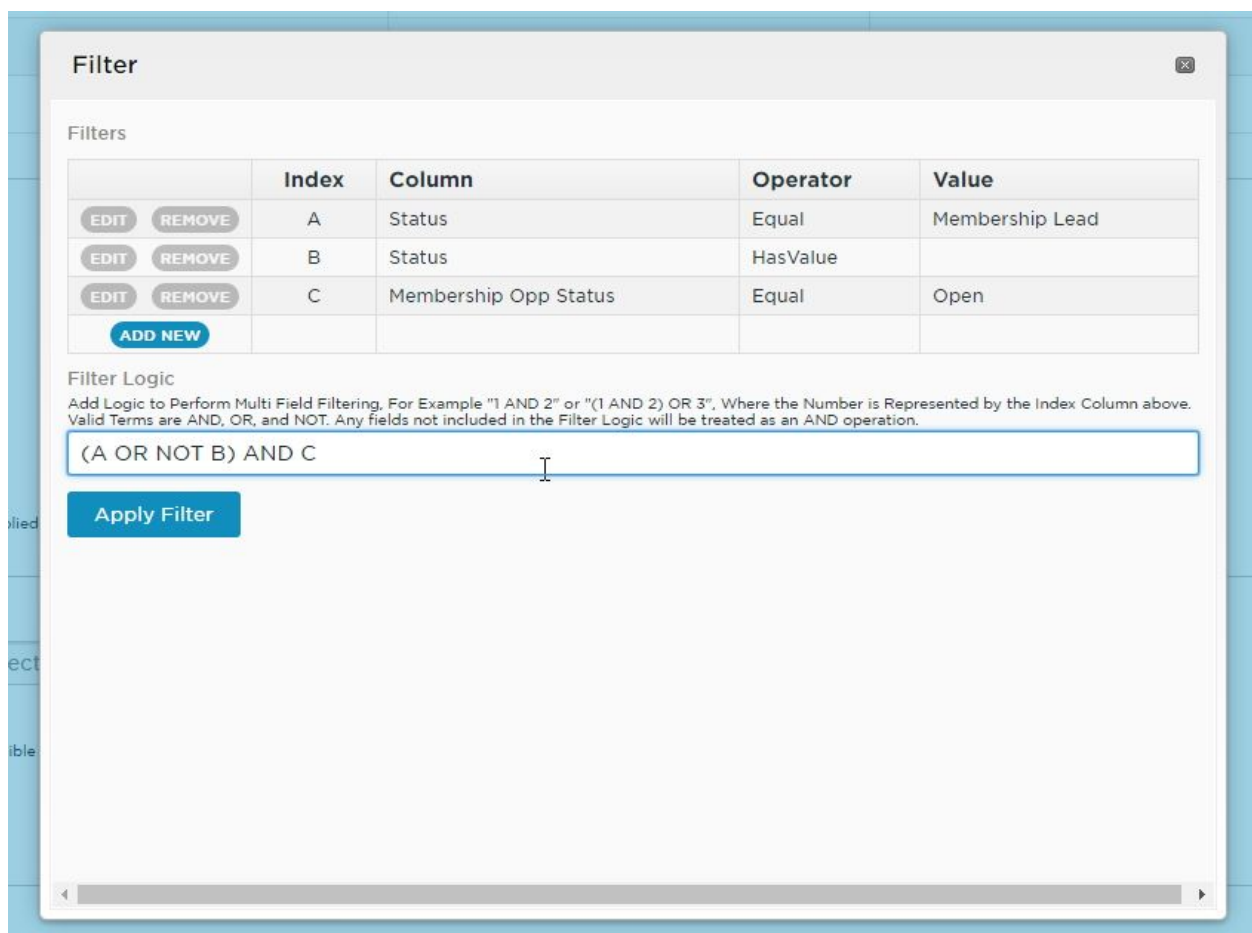
At the top of the popup window is a table in which the field(s) to be used as filters are entered. **Click** on the **blue Add New button** to **configure a field** for this **filter**. The options for each line of the **filter** are as follows:

1. **Index:** Used in the Filter Logic section below to target this line in the filter. This value is automatically generated.
2. **Column:** Select which field to use in the filter.
3. **Operator:** Choose how to compare the selected field to the value entered in the Value column.
4. **Value:** Enter (or choose, for picklist fields) a value to compare the selected field against.

Once you have **filled out all the fields** in this **line**, **click Save**, and your new field comparison will be added to the table. You can repeat this as many times as necessary to build your filter.

Underneath this section is a **text box** to **enter in logic commands** to combine the **fields** entered in the table. This is only necessary if more than one field is selected in the table (if only one field was chosen to filter, then this section should be left blank).

In this section, **use the operators “AND”, “OR”, “NOT”, and parenthesis** to **combine the field comparisons** from the table above, using the **Index value** to refer to a specific line. See the below image for example:



In this image, there are three lines of logic entered:

- Status Equal “Membership Lead”: will be True if a record has a value of “Membership Lead” filled out in their Status field, otherwise will be false.
- Status HasValue: will be True if a record has any value at all in the Status field, otherwise will be false.

- **Membership Opp Stats Equal Open:** will be True if a record has a value of “Open” filled out in their Membership Opp Status field, otherwise will be false.

In this example, we’ve entered the following line of logic:

(A OR NOT B) AND C

In plain English, this states that:

Records that have a Status that is either EQUAL to “Membership Lead” OR that have no value entered in the Status field, AND which have a Membership Opp Status EQUAL to “Open”.

Once you have **set up your filter** as needed, **click** on the **blue button labelled “Apply Filter”** and your **filter** will be **applied** to the **View**.

9. Options:

Use this section to configure some final miscellaneous **options** for this **View**. The **Options** available are:

- **Show Add New Record:** When checked, a button will be present in the View to allow users to add new records. Unchecking the box will hide this button from this View only.
- **Show Edit Record:** When checked, a link will be present next to each record allowing users to edit the selected Record. Unchecking the box will hide this link from all records in this View only.
- **Show Delete Record:** When checked, a link will be present next to each record allowing users to delete the selected Record. Unchecking the box will hide this link from all records in this View only.
- **Allow Export:** When checked, a button will be present in the View to allow users to export the records within this View. Unchecking the box will hide this button from this View only.
- **Allow Messaging:** When checked, users will be able to send messages to records containing email addresses either by hovering the mouse over an email address visible in the View, or by selecting a record and clicking on the *Messaging* button. Unchecking this box will hide the button from this View only, and also prevent the Message option from appearing under email addresses in this View only.
- **Enable Paging:** When checked, this View will be split into pages of 20 records each, which can be scrolled through to view all records. Unchecking this box will force all

records returned in this View to load on the same page, and remove the paging for this View only.

10. Security:

Generally, **security options** for **Views** are **not configured** from the **View** itself, but rather in the **Role Groups** section, so we will not cover this section. By default, all options are set to ***Inherit From Parent Object***.

Please contact your **CRM Support Team** if you need to lock down a View from certain users, as we are happy to cover this with you on a one-on-one basis.

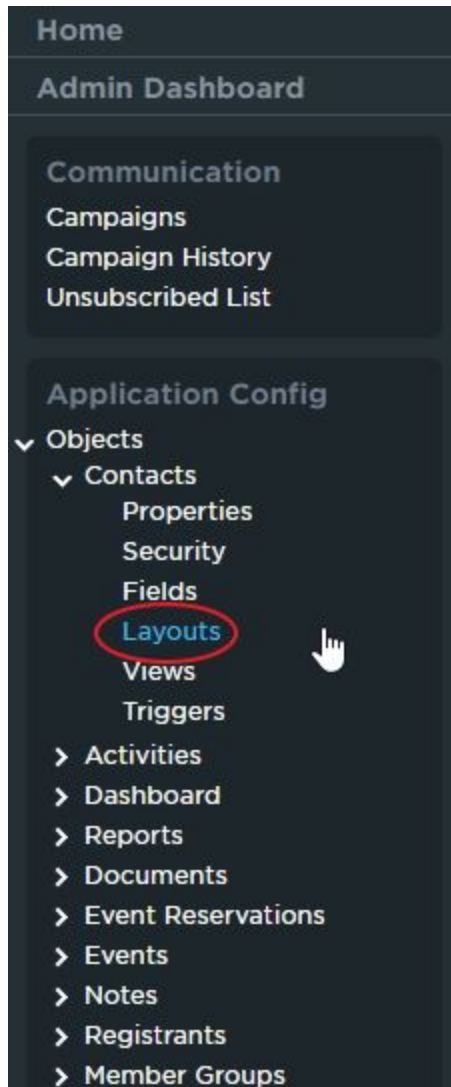
Adding/Editing a CRM Layout

A **Layout** in the **CRM** is a detailed listing of all fields being used to **store data** for every **Record** in a **CRM Object**. A **Layout** is typically accessed by **clicking** a **Record Name** in an associated **View**. **Layouts** are typically broken up into sections, and can have up to four columns to store information in varying configurations.

Adding a new Layout

To **create** your **Layout**, you'll first need to **access** the **Admin Dashboard**. Similar to adding Fields and Views, you'll need to think about which **Object** this **Layout** will reside in. In this example, we'll be adding the new Layout *Real Estate Prospect Entry* to the Contacts Object.

To **add** in your **new Layout** from here, you'll first need to **open** your **Contacts Object** for **editing**. From the **left-hand sidebar**, **click** on **Options** to **expand** the **list** and **display all** of the **Objects** present in your **CRM**. **Contacts** should almost always be the **first Object** listed. **Click** on it to **expand** the **list** further, and then **click** on **Layouts** to be brought straight to the **Layouts** section of the **Contacts Object setup screen**.



You should now see a **list of all available Layouts** within the **Object** you are editing. To **edit** an **existing Layout**, **click** on the **gray *Edit* button** immediately to the **left** of its **name** in the **listing**. To **add a new Layout**, **click** on the **large blue button titled *+ Add New Layout***.

Home
Admin Dashboard

Communication
Campaigns
Campaign History
Unsubscribed List

Application Config
Objects
Contacts
Properties
Security
Fields
Layouts
Views
Triggers
Activities
Dashboard
Reports
Documents
Event Reservations
Events
Notes
Registrants
Member Groups
Group Members
Test
Demo-Worthy Sites
Golf Genius Golfer
Discs
Beacon Hits
Membership Changes
Reports
Queries
Integrations
Inbound
Outbound

User Config
Users
Role Groups
Setup

Layouts

[+ Add New Layout](#) [View Archived Layouts](#)

Name	Default Layout	Description
EDIT Contacts System Default	False	System Created Layout for 'Contacts' Object
EDIT Member Layout	False	
EDIT Prospect Layout	True	
EDIT New Layout	False	
EDIT Guest Layout	False	
EDIT Junior Golf Lessons	False	
EDIT Golf Shop Layout	False	
EDIT Private Event Layout	False	
EDIT Security Gate Layout	False	
EDIT F&B	False	

Views

[+ Add New View](#) [View Archived Views](#)

Name	Default View	Description
EDIT VIEW Contacts System Default	False	System Created View for 'Contacts' Object
EDIT VIEW Contact View - Grand Key Club	False	
EDIT VIEW Outing Prospects	False	
EDIT VIEW Members	False	
EDIT VIEW New View	False	
EDIT VIEW Related Members	False	
EDIT VIEW Guests	False	
EDIT VIEW Grand Key Club Membership Prospects	True	
EDIT VIEW Private Event Prospects	False	
EDIT VIEW Junior Golf	False	
EDIT VIEW Everyone	False	
EDIT VIEW Membership Opps	False	
EDIT VIEW Golf Shop	False	
EDIT VIEW Event Opps	False	
EDIT VIEW Booked Events	False	
EDIT VIEW Security Gate	False	

You should now see the **Edit Layout Screen**:

Home
Admin Dashboard

Communication
Campaigns
Campaign History
Unsubscribed List

Application Config
Objects
Reports
Queries
Integrations

User Config
Users
Role Groups

Setup
Profile
Application Settings
Quick Links
Application Links
Status Types
Outgoing Addresses

Edit Layout [Search](#)

Objects > Contacts > This Layout

1 **Properties**

Name
Real Estate Prospect Entry

Description

Object Default

2 **Security**

Viewing Rights
Can View this Layout (Must also have Object Viewing Rights for this Object Type)
Inherit From Parent Object

Creation Rights
Can Create New Objects using this Layout (Viewing Rights for this Layout and Object Viewing and Creation Rights for this Object Type must also be enabled)
Inherit From Parent Object

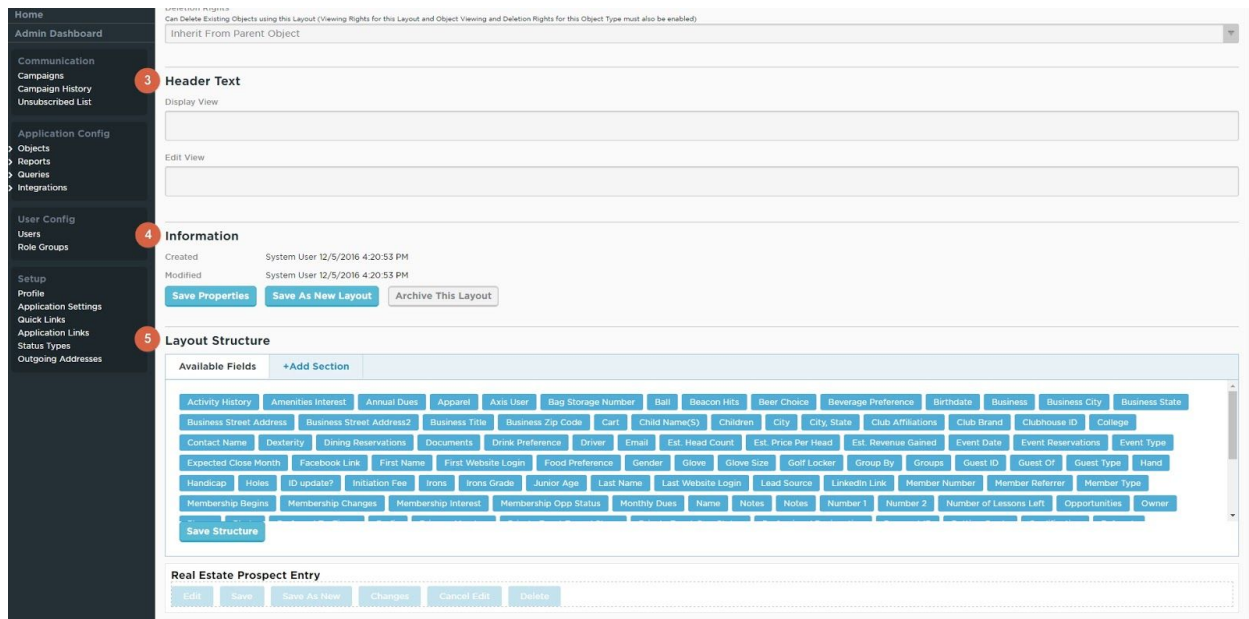
Editing Rights
Can Edit Existing Objects using this Layout (Viewing Rights for this Layout and Object Viewing and Editing Rights for this Object Type must also be enabled)
Inherit From Parent Object

Deletion Rights
Can Delete Existing Objects using this Layout (Viewing Rights for this Layout and Object Viewing and Deletion Rights for this Object Type must also be enabled)
Inherit From Parent Object

Header Text

Display View

Edit View



When first **creating** a new **Layout**, you will only see **sections 1-4**. **Section 5** will **appear** once you **click** the **Save Properties** button.

1. Properties: In this section, enter the basic identifying information for this Layout:

- **Name:** Enter a name for this Layout. You will use this to reference your Layout in a View, or for future editing.
- **Description:** Optionally, enter a description of this layout. This is only visible when editing the Layout, not when viewing data within the Layout, so most users will not see anything written here.
- **Object Default:** Check this box to set this Layout as the default for this Object. Any links to records of this Object will open the default Layout unless the link specifically targets a different Layout.

2. Security: Generally, security options for Layouts are not configured from the Layout itself, but rather in the Role Groups section. By default, all options are set to “Inherit From Parent Object”.

Please contact your **CRM Support Team** if you need to lock down a Layout from certain users, as we are happy to cover this with you on a one-on-one basis.

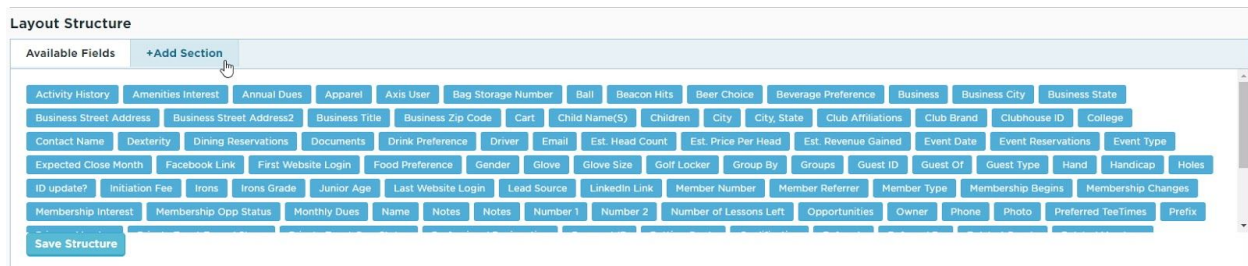
3. Header Text: This section is used by your CRM Support Team to add in client-side scripting or style code to this Layout. Generally, it is advised not to enter anything in this section yourself unless you are proficient in writing Javascript and/or CSS code.

4. Information: Displays system information about this Layout, and includes action buttons for the Layout.

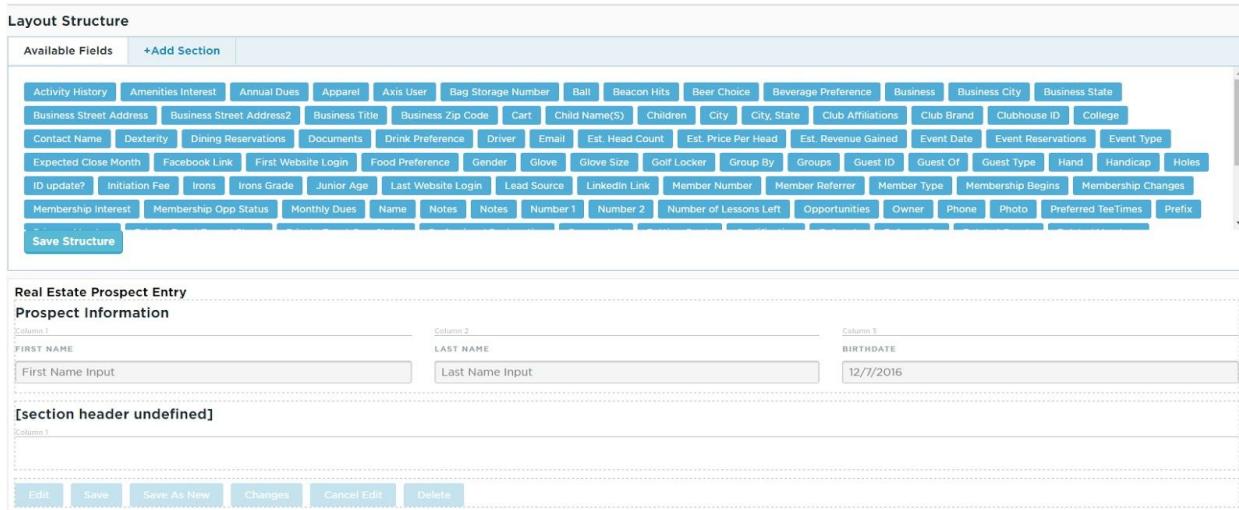
- **Created:** The time this Layout was created, and the user that created it.
- **Modified:** The time this Layout was last modified, and the user that made the changes.
- **Save Properties:** Saves the Properties of this Layout (anything entered in sections 1 -3 above).
- **Save As New Layout:** Creates a brand new Layout in this Object, and gives it the exact same Properties and Structure as this Layout. Useful for creating two similar Layouts with only minor differences.
- **Archive This Layout:** Will remove this Layout from the list of Layouts in this Object, and will prevent it from being displayed to Users.

5. Layout Structure: This section allows you to configure the structure of the Layout. Here you can determine which fields are shown in this Layout, and in which order.

At the **top** of this **section** is a **list of actionable items (Available Fields and + Add Section)**, which can be **dragged** below to **place** them in the **Layout body**.



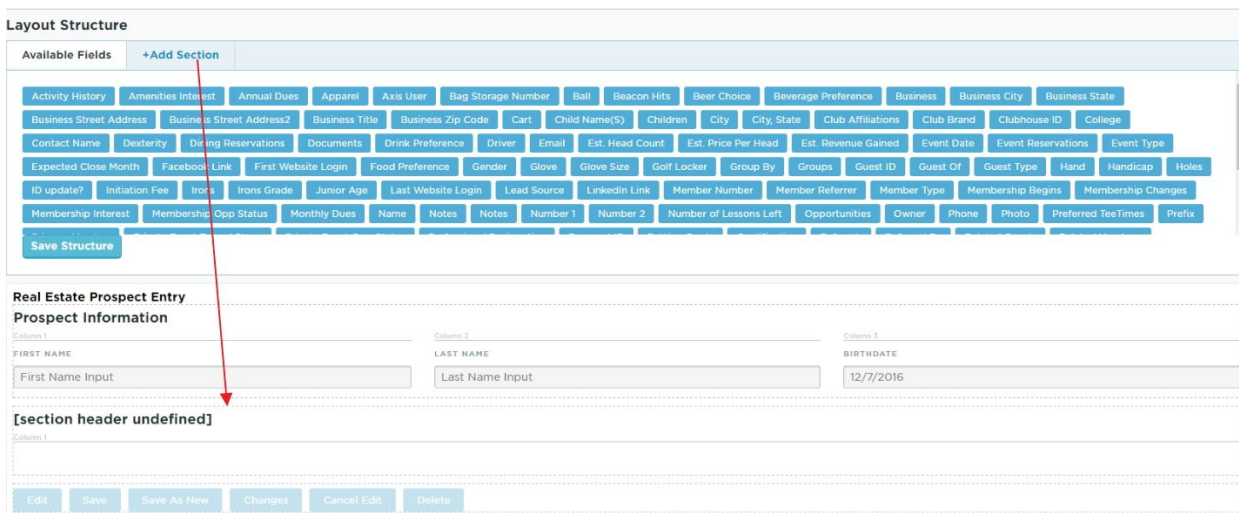
Beneath this is a **canvas**, on which you **place Sections and Fields** to **display** in the **body** of the **Layout**. This **canvas** is made up of **Sections**, and each **Section** is made up of **Fields**. When **viewing a Layout** from the **user facing** side, **Sections** keep **fields organized** within the **Layout** by providing a **header/title**, and **each Section** is also **collapsible** to enable the **user** to **hide** certain **fields** that they aren't using at the current time. Typically, it is a good practice to have as many **Sections** as possible in your **Layout** to help **group** like **fields** together, and allow for a logical and visually pleasing display of **data**.



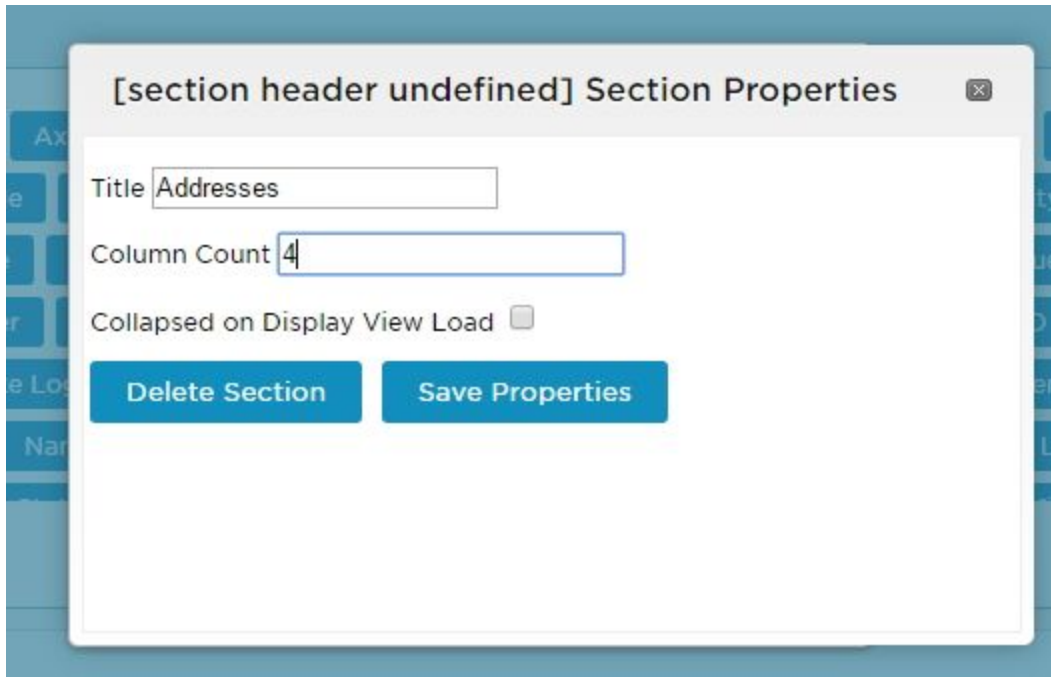
Utilizing these **two sections**, you should now be able to begin formatting this **Layout** by **clicking any item in the top section**, and **dragging** it to the **desired location** in the **canvas** below.

First, and most importantly, you'll need to **add in at least one Section**, in which you'll be able to **place and order fields**. **Fields** cannot exist in a **Layout outside of a Section**, so it is necessary to add in at least one **Section** before **adding** any **Fields**.

To **add a new Section**, find the tab at the top of the Layout Structure section titled **+ Add Section**. **Click and hold on this**, and **drag it down** to the **canvas section**, then release it where you would like it to be placed. You can **reorder existing Sections** in your **Layout** by **clicking** on the **Section heading** and **dragging it up or down** in the **Layout** to its **desired location**.



By default, your new **Section** will **not have a title**, and it will contain only **one column** for **Fields**. To **edit** the **settings** of this **Section**, **click on its title**, and a **popup** will appear in which you can **edit** the **Section settings**.



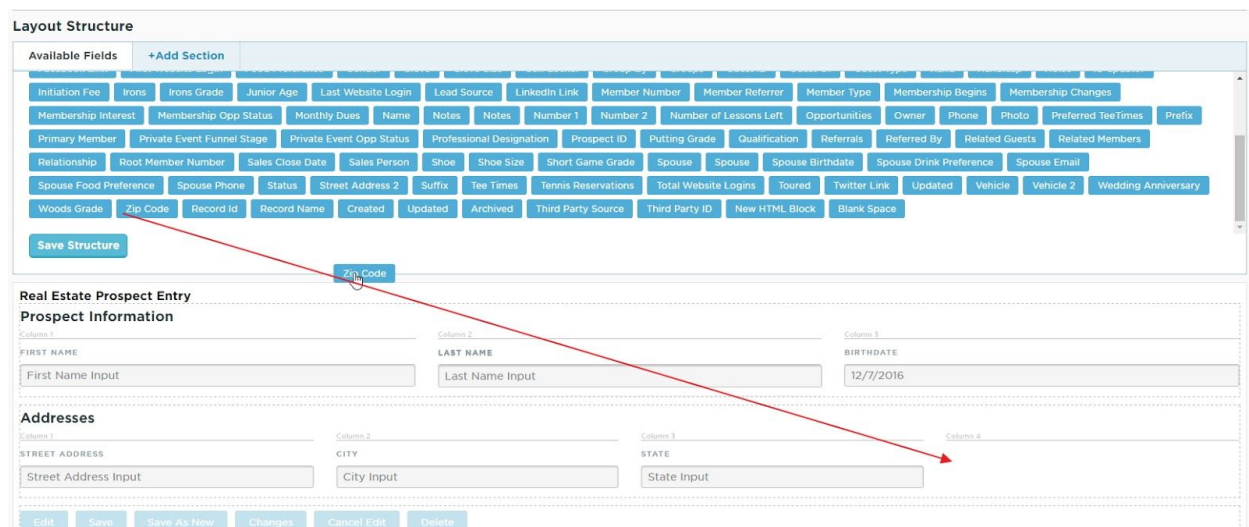
In the **Section Properties** window, you can **edit** the following information:

- **Title:** Give a title to this Section, which will be visible to users when viewing this Layout.
- **Column Count:** Choose how many columns of fields should be available in this Section. The minimum number of columns allowed is 1, and the maximum is 4. Fields will stretch to fill the entire screen regardless of the number of columns. Therefore, fields will appear larger in a Section with fewer columns, and will appear smaller in a Section with more columns.
- **Collapsed on Display View Load:** If this box is checked, then this Section will default to collapsed when the Layout is first loaded. Users would have to click on the Section title to expand it and view the Fields within. If this box is unchecked, then this Section will default to display all Fields within, unless the User clicks on the Section title to collapse it.

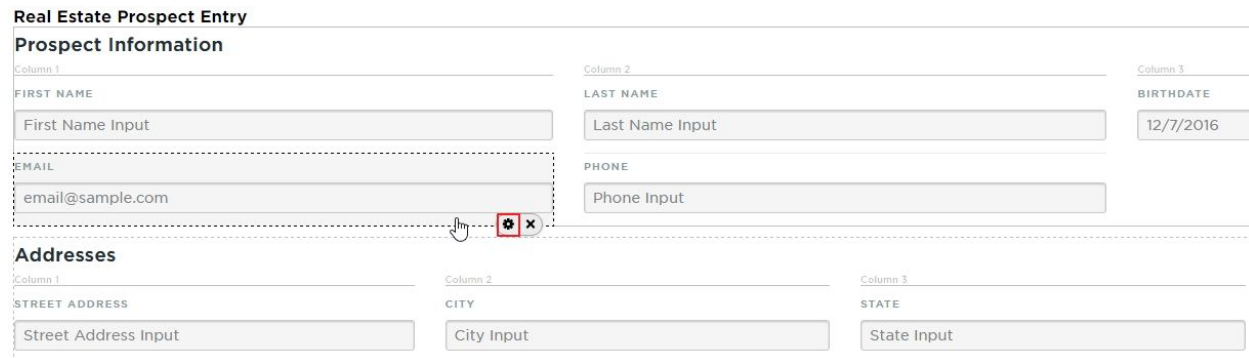
Once you've configured the **Section** as desired, **click** on the **Save Properties** button and this window will disappear. Then the **Section** will **update** in the **Layout Structure** beneath.

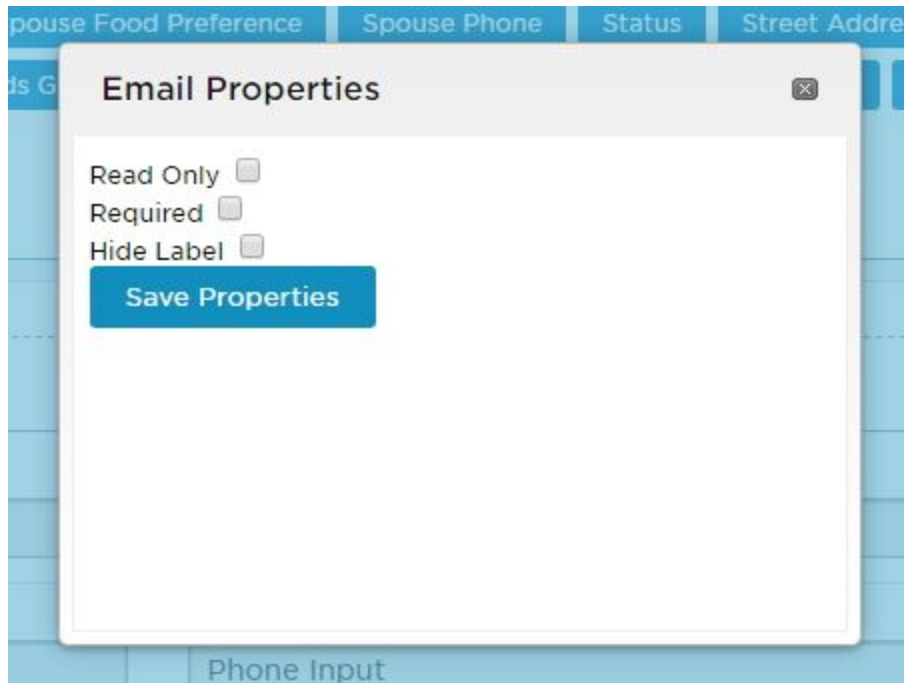


With a new **Section** in place, now you can **place** some **Fields**. **Adding Fields** works very similarly to adding Sections - simply **find the Field** you would like to **add** in the **list of available Fields** in the top section, then **click and drag it down to the canvas** where you would like to place it. You can also **reorder existing Fields** in the **canvas** by **clicking** and **dragging** them around to their desired location.



Each **field** within a **Layout** has some basic **properties** that can be **edited**. To access these **properties**, **hover over the field** you need to access, and **click** on the **small gear icon** that appears over the **bottom-right corner of the field**.

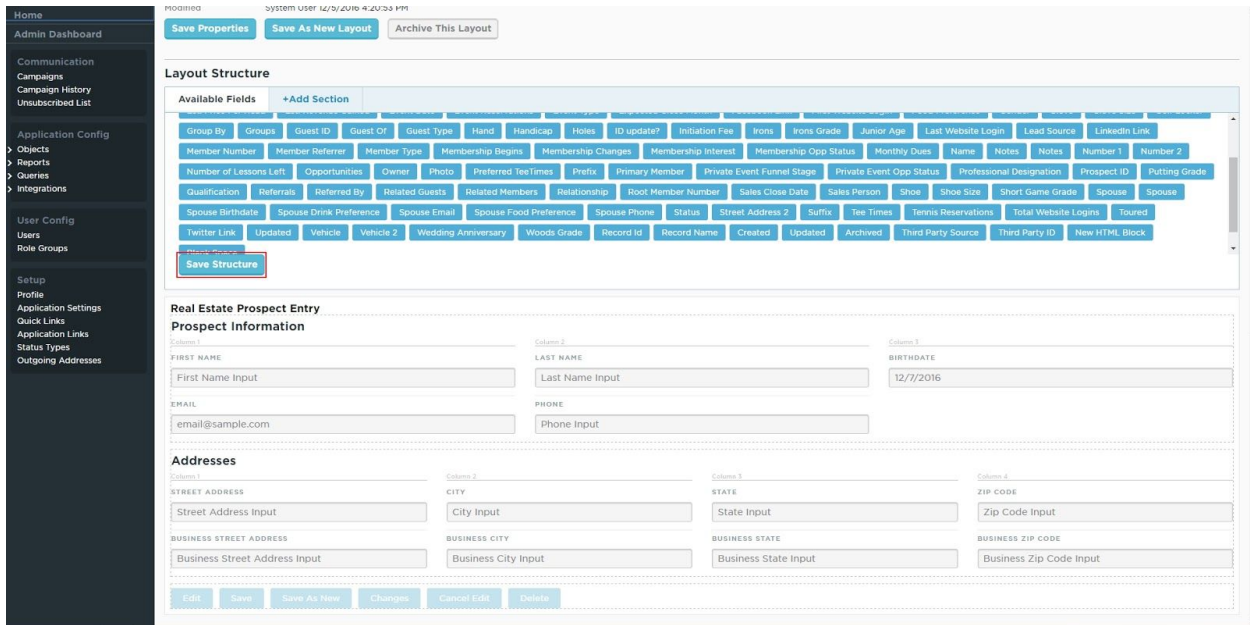




For most fields, there are only a few properties to edit:

- **Read Only:** Mark this field as read only, so that users can view the content within it, but never edit it.
- **Required:** Mark this field as required to be filled out before saving the record in this Layout. Choosing this option will only affect this field in this specific Layout.
- **Hide Label:** When this box is checked, only the data contained within this field will be displayed - not the name of the field itself.

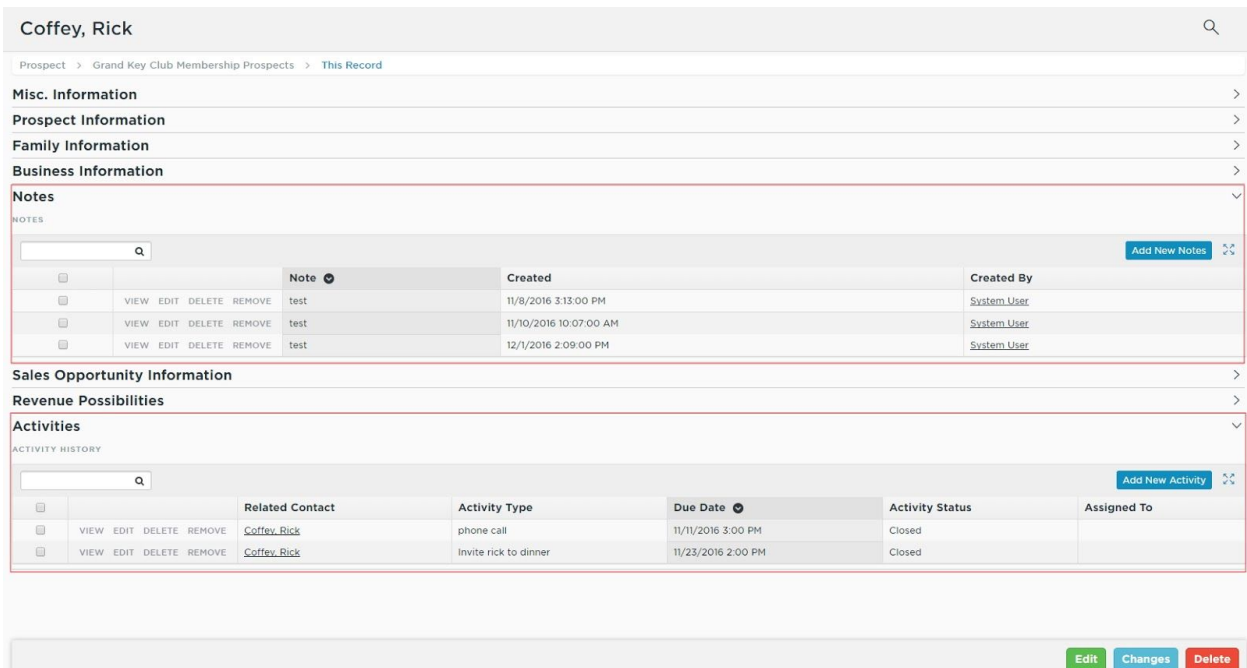
Finally, once all the **Sections and Fields** have been added to the canvas as needed for this **Layout**, click on the **Save Structure button**, which is located at the bottom of the list of available Fields.



The screenshot shows the CRM layout editor interface. At the top, there are buttons for 'Save Properties', 'Save As New Layout', and 'Archive This Layout'. Below this is the 'Layout Structure' section, which includes an 'Available Fields' palette with a '+Add Section' button. The palette contains various fields such as 'Group By', 'Groups', 'Guest ID', 'Guest Of', 'Guest Type', 'Hand', 'Handicap', 'Holes', 'ID updated?', 'Initiation Fee', 'Irons', 'Irons Grade', 'Junior Age', 'Last Website Login', 'Lead Source', 'LinkedIn Link', 'Member Number', 'Member Referrer', 'Member Type', 'Membership Begins', 'Membership Changes', 'Membership Interest', 'Membership Opp Status', 'Monthly Dues', 'Name', 'Notes', 'Notes', 'Number 1', 'Number 2', 'Number of Lessons Left', 'Opportunities', 'Owner', 'Photo', 'Preferred Tee Times', 'Prefix', 'Primary Member', 'Private Event Funnel Stage', 'Private Event Opp Status', 'Professional Designation', 'Prospect ID', 'Putting Grade', 'Qualification', 'Referrals', 'Referred By', 'Related Guests', 'Related Members', 'Relationship', 'Root Member Number', 'Sales Close Date', 'Sales Person', 'Shoe', 'Shoe Size', 'Short Game Grade', 'Spouse', 'Spouse', 'Spouse Birthdate', 'Spouse Drink Preference', 'Spouse Email', 'Spouse Food Preference', 'Spouse Phone', 'Status', 'Street Address 2', 'Suffix', 'Tee Times', 'Tennis Reservations', 'Total Website Logins', 'Toured', 'Twitter Link', 'Updated', 'Vehicle', 'Vehicle 2', 'Wedding Anniversary', 'Woods Grade', 'Record Id', 'Record Name', 'Created', 'Updated', 'Archived', 'Third Party Source', 'Third Party ID', and 'New HTML Block'. A 'Save Structure' button is highlighted in red. Below the palette is the 'Real Estate Prospect Entry' form, which is divided into sections: 'Prospect Information' (with fields for First Name, Last Name, Birthdate, Email, and Phone) and 'Addresses' (with fields for Street Address, City, State, Zip Code, Business Street Address, Business City, Business State, and Business Zip Code). At the bottom of the form are buttons for 'Edit', 'Save', 'Save As New', 'Changes', 'Cancel Edit', and 'Delete'.

Accessing Data From Outside Objects in a Layout

While using your CRM, you may have noticed cases in which data from one **Object** is displayed inside a **Layout** of a **different Object**. The **Activities** section within a **Prospect Layout** is a great example of this, as is the **Notes** section.



The screenshot shows the CRM record view for 'Coffey, Rick'. The record is titled 'Coffey, Rick' and is located under 'Prospect > Grand Key Club Membership Prospects > This Record'. The record is divided into several sections: 'Misc. Information', 'Prospect Information', 'Family Information', 'Business Information', 'Notes', 'Sales Opportunity Information', 'Revenue Possibilities', and 'Activities'. The 'Notes' section is expanded, showing a table of notes. The 'Activities' section is also expanded, showing a table of activities. At the bottom of the record are buttons for 'Edit', 'Changes', and 'Delete'.

	Note	Created	Created By
<input type="checkbox"/>	VIEW EDIT DELETE REMOVE test	11/8/2016 3:13:00 PM	System User
<input type="checkbox"/>	VIEW EDIT DELETE REMOVE test	11/10/2016 10:07:00 AM	System User
<input type="checkbox"/>	VIEW EDIT DELETE REMOVE test	12/1/2016 2:09:00 PM	System User

	Related Contact	Activity Type	Due Date	Activity Status	Assigned To
<input type="checkbox"/>	VIEW EDIT DELETE REMOVE Coffey, Rick	phone call	11/11/2016 3:00 PM	Closed	
<input type="checkbox"/>	VIEW EDIT DELETE REMOVE Coffey, Rick	Invite rick to dinner	11/23/2016 2:00 PM	Closed	

These **sections** within the **Prospect Layout** are what are called **Parent-Child Relationship fields**. They allow **data** from **one Object**, in this case either the **Activities** or **Notes Objects**, to be **displayed within a different Object**, in this case the **Contacts Object**. In order to display this kind of information in a **Layout**, the associated **Parent-Child Relationship field** should be **added** to the **Layout**.

Before editing the Layout, you should first determine which **Parent-Child fields** are available in your **Object**. **Open** up your **Object** for **editing**, and **view** the **list** of **available Fields**. You will be able to tell if a **field** is a **Parent-Child field** based on the **Data Type** of the **field**. Instead of showing a **standard data type**, a **Parent-Child field** will instead show the **name** of the **Object** that it is **relating to**.

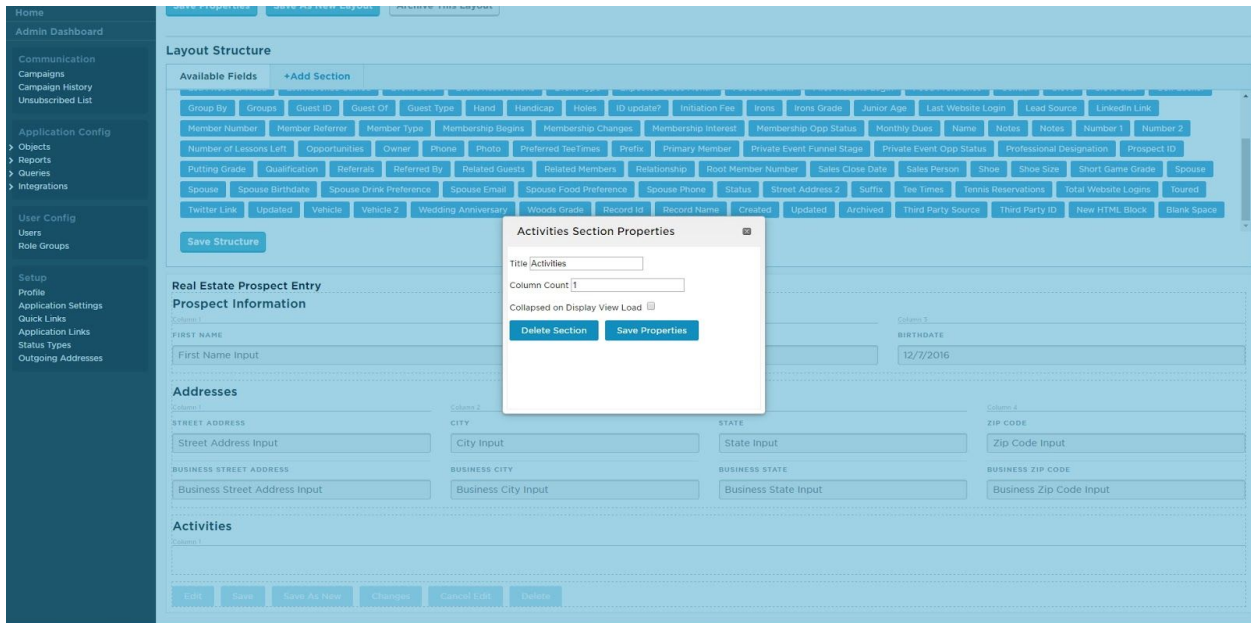
Fields

[+ Add New Field](#)

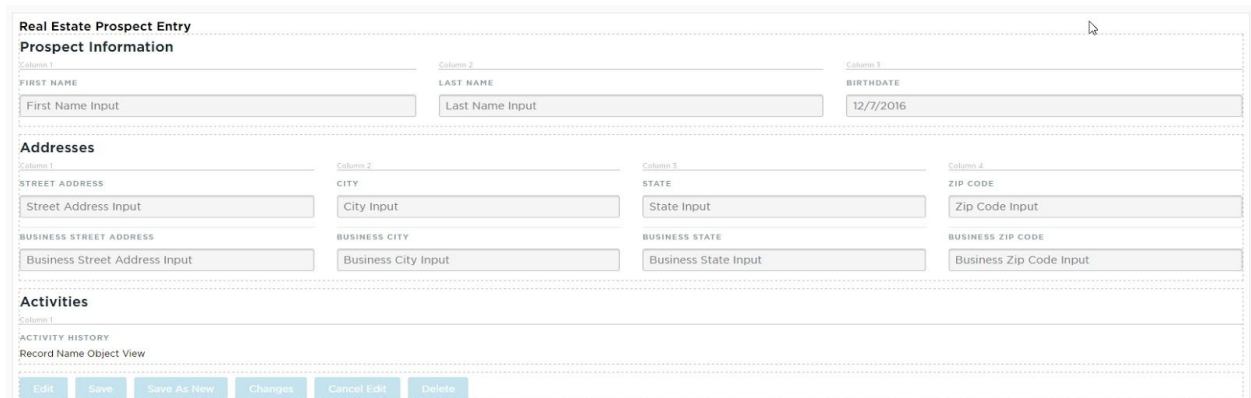
	Name	Column Name	Data Type	Description
EDIT	Activity History	Activity_History5	Activities	asc
EDIT	Amenities Interest	Amenities_Interest	Picklist (Multi-Select)	
EDIT	Annual Dues	Annual_Dues	Currency	
EDIT	Apparel	Apparel	Text	
EDIT	Axis User	Axis_User	Axis User	
EDIT	Bag Storage Number	Bag_Storage_Number	Text	
EDIT	Ball	Ball_Brand	Text	

In the above example, the **field Activity History** has a **data type** of **Activities** signifying that it is a **Parent-Child field**, relating to the **Activities Object**.

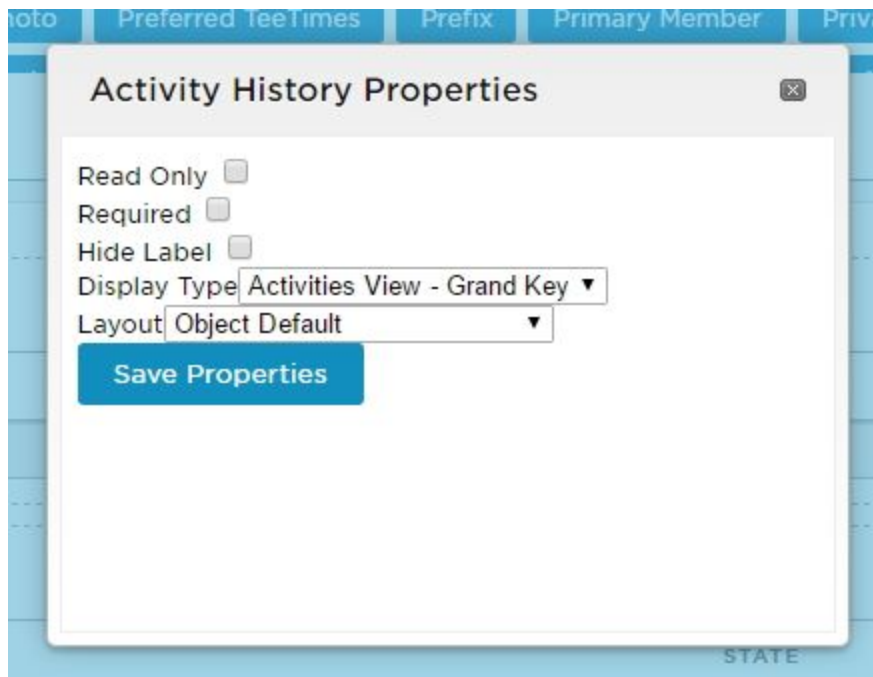
Once you've identified a **Parent-Child field**, **open** up the **Layout** to **edit**, and **scroll down** to the **Layout Structure canvas**. To begin, **add** a **new Section** to house this **field** - generally you will want to have each **Parent-Child relationship field** to **live** in a **section alone**, as the **field** will display as a **full section** in the **Layout**. Typically, it is best to leave this section set to only one column as well, for the same reason.



Next, locate the **Field** that you identified earlier from the **list of available fields**, and drag it down to this new **Section**. Instead of appearing as most of the other **fields**, this **field** will instead say **“Record Name Object View”**.



Once the field has been added to the **Layout**, **click the Save Structure button**, and it should be ready to use. However, there are a few more **properties** that can be **edited** for this type of **field**, which can improve the user experience when viewing this **Layout**. To access the **field Properties**, **hover over the field** in the **canvas**, and **click on the small gear icon** that appears over the bottom-right corner of the field. This will bring up a **popup window**, pictured below:



Here you'll see the same list of field properties that exists for all fields, plus two new options:

- **Display Type:** Select from the list which View from the Child Object (in this case, *Activities*) to use to display the content within this Layout. The fields that will be shown in your Layout are determined by the View selected in this option.
- **Layout:** Select from the list which Layout from the Child Object (in this case, *Activities*) to display when a record from within this View is clicked.

If none of the options available in these lists are what you need, you'll need to open up the **Child Object** and **edit/create** the **Views/Layouts** as needed.

FAQs

Q: Why can't I access the Object settings? I'm receiving an error 'Invalid Permissions to View This Page'?

A: Only Object Administrators have access to edit settings within an Object. If you are receiving this message, your account may not be set as an Object Administrator. Please note that CRM pricing is based on a per admin user basis, so adding additional Object Administrator accounts may incur additional fees. Contact your Account Manager to discuss this further.

Best Practices

1. **Adding/Editing Fields:** Be as descriptive as possible with field titles to make data entry easier in the future. Typically, if a piece of data can be described using multiple fields instead of just one, it should be, to allow for more granular reporting. For example, instead of one address field, we have 5 - Street Address 1, Street Address 2, City, State, Zip Code.
2. **Adding/Editing Views:** Keep the filters in Views simple - leave the more advanced filtering options for queries/reports. Try to design your Views to display large chunks of similar records, separated out by basic identifying features, such as Status, or Contact Type, etc.
3. **Adding/Editing Layouts:** Generally, it is easier for users to use a Layout that has more Sections, as opposed to those that have fewer Sections. Use Sections liberally to group like fields together. For example, have a "Prospect Information" Section containing basic identifying and demographic information about a Contact, a Section for Addresses, one for Opportunity information, and another for Spouse/Family information.