# **C**reating/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.

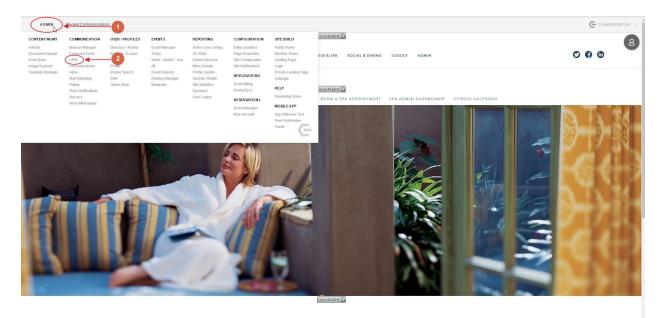
## Use Case

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.

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Reports sed Sales se Rates by Sales Person			۹						1 C Export	Messagi Logout	
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aign History		EDIT DELETE	Bennett, Brian	A	2017	Social	Dining	Social Media	Wilson, John	brian.bennett@aol.com	4/28/2
t Items		EDIT DELETE	Anderson, JJ	A	December '16	Junior Golf	Fitness, Golf	Email In	Adkins, William A.	jj@taco.com	4/28/2
ion, Test		EDIT DELETE	Patterson, Greg	с	2017	Social	Biking, Dining, Kayaking, Spinning	Website Form		greg@yahoo.com	3/24/20
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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.

Communication Campaigns			Q						A Export	Messaging Add New Prospec	a 🗢 🕸
Campaign History Unsubscribed List			Prospect	Qualification	Expected Close Month	Membership Interest	Amenities Interest	Lead Source	Referred By	Email	Created (
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		EDIT DELETE									11/22/2016 1
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pplication Settings		EDIT DELETE	Zak, Stacy	A	November '16	Social	Dining, Golf, Kids Events	Other	Larabee, Zach	szak@clubessential.com	5/13/2016 10
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atus Types		EDIT DELETE	Anderson, JJ	A	December 16	Junior Golf	Fitness, Golf	Email In	Adkins, William A.	jj@taco.com	4/28/2016 1
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		EDIT DELETE	McDonald, Ray	A	December '16	Regular Golf	Dining, Golf	Member Referral	Aaron, Duane	rmcd@ce.com	3/11/2016 10
		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	в	2017	Regular Golf	Biking, Golf	Direct Mail	Dinsmoor, Brooke	lesismore@att.net	2/18/2016 4
		EDIT DELETE	Lawson, Tim	А	2017	Junior Golf	Kids Events, Social Events	Walk In		tim.lawson@clubtech.com	2/18/2016 4:
		EDIT DELETE	Nixon, Richard	с	2017	Regular Golf	Biking	Website Form		Richard@whitehouse.gov	2/3/2016 3:5
	0	EDIT DELETE	Underwood, Kristi	в	December '16	Social	Dining, Fitness	Email In		ku@byc.com	12/22/2015 1

# 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.

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

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**.

lome	Fields		2		
Admin Dashboard	+ Add	New Field			
Communication		Name	Column Name	Data Type	Description
Campaigns	EDIT	Activity History	Activity_History5	Activities	asc
Campaign History Jnsubscribed List	EDIT	Amenities Interest	Amenities_Interest	Picklist (Multi-Select)	
	EDIT	Annual Dues	Annual_Dues	Currency	
Application Config	EDIT	Apparel	Apparel	Text	
Objects	EDIT	Axis User	Axis_User	Axis User	
✓ Contacts	EDIT	Bag Storage Number	Bag_Storage_Number	Text	
Properties Security	EDIT	Ball	Ball_Brand	Text	
Fields	EDIT	Beacon Hits	Beacon_Hits	Parent-Child Relationship	asc
Layouts	EDIT	Beer Choice	Beer_Choice	Text	
Views Triggers	EDIT	Birthdate	Birthdate_	Date	
> Activities	EDIT	Business	Business	Text	
> Dashboard	EDIT	Business City	Business_City	Text	
> Reports	EDIT	Business State	Business_State	Text	
<ul> <li>Documents</li> <li>Event Reservations</li> </ul>	EDIT	Business Street Address	Business_Street_Address	Text	
> Events	EDIT	Business Street Address2	Business Street Address2	Text	
> Notes	EDIT	Business Title	Business Title	Text	
> Registrants	EDIT	Business Zip Code	Business Zip Code	Text	
Member Groups		Cont	Dusiness_Zip_Code	T	

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

Home Admin Dashboard	Edit Field	Q
Communication Campaigns Campaign History Unsubscribed List	Objects > Contacts > This Field Properties	
Application Config > Objects > Reports > Queries > Integrations	Labil United States Legals, Rends, and Lab Colomo Isaan Saa O for Suddees Colom used for storge and 49 access. Mainton Length is 50 threaders. 2	
User Config Users Role Groups	Pescretaria 3	
Setup Polie Application Sellings Quick Links Application Links Status Types Outgoing Addresses	Del Type Control     Point Reaction to attain the same a	

- 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. <u>Checkbox</u>: Sets this field as a checkbox, which can either be checked (true) or unchecked (false).
  - b. <u>Currency</u>: 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. <u>Date</u>: Sets this field as a date, with no time value. Brings up a datepicker when entering data.
  - d. <u>Date/Time</u>: Sets this field as a date with the time appended. Brings up a datepicker with time selector when entering data.
  - <u>Email</u>: 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. <u>Number</u>: 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. <u>Picklist</u>: Sets up a dropdown list of options to choose from, of which only one option can be selected.
  - h. <u>Picklist (Multi-Select)</u>: Sets up a list of checkboxes, representing options, from which multiple values can be selected.
  - <u>Text</u>: 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. <u>Text Area</u>: 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.

Home	Edit Field
Admin Dashboard	
Communication Campaigns Campaign History Unsubscribed List	Objects > Contacts > This Field Properties
Application Config > Objects > Reports > Queries > Integrations	Label Used on Displays, Layouts, Reports, and Lists Beverage Preference Column Name Name of the Database Column used for storage and API access. Maximum Length is 50 characters. Beverage_Preference
User Config Users Role Groups	Description
Setup Profile Application Settings Quick Links Application Links Status Types Outgoing Addresses	Data Type Picklist Options Adjust Options for the Picklist here, Optionally Check the Item you wish to make the default value. Click here to load options from a template. Cocktails Whiskey Wine (Red) Wine (Red) Mine (White) Add Option Sort Order Order in which to sort the Items in the Picker Defined Order Alphabetical Requirea value in this field Save Properties

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 <u>all</u> 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**.

ome	Fields				
dmin Dashboard	+ Add	New Field			
Communication		Name	Column Name	Data Type	Description
Campaigns	EDIT	Activity History	Activity_History5	Activities	asc
Campaign History Insubscribed List	EDIT	Amenities Interest	Amenities_Interest	Picklist (Multi-Select)	
IISUDSCIIDEU LISU	EDIT	Annual Dues	Annual_Dues	Currency	
oplication Config	EDIT	Apparel	Apparel	Text	
pjects	EDIT	Axis User	Axis_User	Axis User	
✓ Contacts	EDIT	Bag Storage Number	Bag_Storage_Number	Text	
Properties	EDIT	Ball	Ball_Brand	Text	
Security Fields	EDIT	Bail Beacon Hits		Parent-Child Relationship	asc
Layouts			Beacon_Hits		asc
Views	EDIT	Beer Choice	Beer_Choice	Text	
Triggers	EDIT (	Beverage Preference	Beverage_Preference	Picklist	
> Activities	EDIT	Birthdate	Birthdate_	Date	
> Dashboard	EDIT	Business	Business	Text	
<ul> <li>Reports</li> <li>Documents</li> </ul>	EDIT	Business City	Business_City	Text	
Event Reservations	EDIT	Business State	Business_State	Text	
> Events	EDIT	Business Street Address	Business_Street_Address	Text	
Notes	EDIT	Business Street Address2	Business_Street_Address2	Text	
Registrants     Member Groups	EDIT	Business Title	Business_Title	Text	
Group Members	EDIT	Business Zip Code	Business_Zip_Code	Text	
Test	EDIT	Cart	Cart	Text	
> Demo-Worthy Sites	EDIT	Child Name(S)	Child_Name_S_	Text	
> Demo-Worthy Compone	EDIT	Children	Children	Text	
<ul> <li>Golf Genius Golfer</li> <li>Beacons</li> </ul>				Text	
Beacon Hits	EDIT	City	City7		
Membership Changes	EDIT	City, State	City_State	Text	
Reports	EDIT	Club Affiliations	Club_Affiliations	Text	
lueries	EDIT	Club Brand	Club_Brand	Text	
ntegrations > Inbound	EDIT	Clubhouse ID	Clubhouse_ID	Text	
Outbound	EDIT	College	College	Text	
	EDIT	Contact Name	Contact_Name2	Text	
Jser Config	EDIT	Dexterity	Dexterity	Picklist	
sers	EDIT	Dining Reservations	Dining_Reservations	Parent-Child Relationship	asc
ole Groups	EDIT	Documents	Documents7	Documents	asc
	EDIT	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 **edi**t 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" 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.

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

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*.

	-					
Dashboard	Views					
unication gns	+ Add	New View				View Archived View
gn History		Name		Default View	Description	
cribed List		Contacts System Default		False	System Created View for 'Contacts' Object	
ation Config		NEW Contact View - Grand Key Club		False		
		Outing Prospects		False		
	000	Members		False		
arties rity		new View	13	False		
Lý		new Related Members		False		
	œ (	new Guests		False		
		Grand Key Club Membership Prospe	ects	True		
		Private Event Prospects		False		
		nuw Junior Golf		False		
		new Everyone		False		
		Nembership Opps		False		
ations		Golf Shop		False		
		Event Opps		False		
	(C) (	Booked Events		False		
	000 0	Security Gate		False		
		F&B		False		
hy Sites hy Compone Golfer	Trigger + Add	'S New Trigger				View Archived Trigg
		Name	Description			
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You should now see the *Edit View* screen:

Home Admin Dashboard	Edit View	1				Q				
Communication Campaigns Campaign History		atacts > This View								
Unsubscribed List	Properties									
Application Config Objects	Name Real Estate Prospects									
> Reports > Queries > Integrations	Description									
User Config Users Role Groups	Layout	Prospect Layout								
Setup	Object Default									
Profile Application Settings	Object Display Name Real Estate Prospect									
Quick Links 5 Application Links										
Status Types Outgoing Addresses	Real Estate Prospects									
Outgoing Addresses										
6	Fields									
		Column Name	Data Type	Display As	User Filterable					
	EDIT REMOVE	RecordName	Text			\$				
	EDIT REMOVE	Created	DateTime			\$				
	EDIT REMOVE	Updated	DateTime			\$				
	ADD NEW					\$				
	Sorting									
	Enable User Sorting The sort order can be chi	anged on the user side								
	Multi Column Sortin	g U								

Home	7 Sorting	
Admin Dashboard	Enable User Sorting	
free commences and the	Enable User Sorting U	
Communication Campaigns	Multi Column Sorting 📄	
Campaign History	The use soft order can could in multiple helds Default Soft	
Unsubscribed List	Apply this sort to view on initial load	
	Add Sort Field	
Application Config  Objects	Default Sort Ahways Applied	
> Objects > Reports	Applied  When checket, the sort order defined above is always applied before any user sorting is chosen	
> Queries		
> Integrations	8 Filtering	
10 March 10		
User Config Users	Quick Filter Field	
Role Groups	Show Letter Picker 🛛 🗹	
	Apply any default filters for the View. These will not be visible when using the View, and will be applied regardless of any selected user filtering.	
Setup	No Detruit Filter Configured Edit Filter	
Profile	Edit Finter	2
Application Settings Quick Links		3
	9 Options	
Status Types	Show Add New Record	
Outgoing Addresses	Show fail Record S	
	allow call rescript a	
	Allow Export	
	Allow Messaging	
	Enable Paging	
	Security	
	Viewing Rights	
	Can View this View (Must also have Object Viewing Rights for this Object Type)	
	Inherit From Parent Object	Ψ.
	Creation Rights Can creat New Objects from the View (Viewing Rights for this View and Object Viewing and Creation Rights for this Object Type must also be enabled)	
	Inherit From Parent Object	Ψ.
	Editing Rights	
Home	Quick Filter Field	
Admin Dashboard	Guick Filter Field	
Communication	Show Letter Picker 🛛 🕄	
Campaigns	Apply any default fitters for the View. These will not be visible when using the View, and will be applied regardless of any selected user fittering. No Default "Fitter Configured"	
Campaign History	Edit Filter	
Unsubscribed List		
Annellandian Condin		
Application Config  Objects	Options	
> Reports	Show Add New Record 🗟	
> Queries	Show Edit Record	
> Integrations	Cham Delate Desert	

> Integrations						
	Show Delete Record					
User Config	Allow Export					
Users	Allow Messaging 🛛					
Role Groups	Enable Paging 🐱					
Setup						
Profile	Security					
Application Settings Quick Links	Verwing Bights Can View-Bit War Child also have Object Viewing Bights for this Object Type)					
Application Links Status Types	Inherit From Parent Object	Ψ.				
Outgoing Addresses	Creation Rights Can Create New Objects from this View (Viewing Rights for this View and Object Viewing Rights for this Object Type must also be enabled)					
	Inherit From Parent Object					
	Editing Rights Can Edit Exiting Objects from this View (Viewing Rights for this Viewing and Editing Rights for this Object Type must also be enabled)					
	Inherit From Parent Object	<b>T</b>				
	Deletion Rights Can Delete Susting Objects from this View (Viewing Rights for this View and Object Viewing and Deletion Rights for this Object Type must also be enabled)					
	Inherit From Parent Object	$\overline{\mathbf{A}}$				
	Information					
	Created -					
	Modified - Dr					
	Save Properties					

- 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.
- 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.

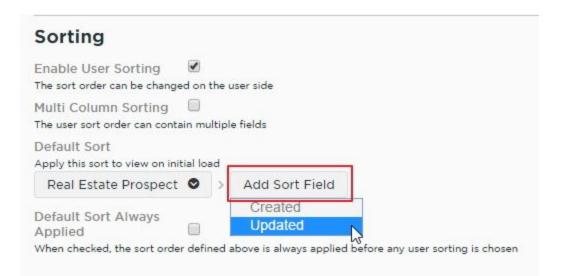
- **4. Object Default:** Check this box to make this View the default for this Object. Any reference to this Object that does not point to a specific View will instead show the Object Default View.
- 5. Object Display Name: Dictates how the Object will be referenced from within this View. For example, 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 <u>after</u> 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:

SAVE CANCEL	A St B	olumn atus Membership Opp S g, For Example "1 AND 2" or "(1 Al ields not included in the Filter Lo	Operator Equal Equal	▼ Oper	ership Lead N	n abov
Filter Logic Add Logic to Perform Mult Valid Terms are AND, OR, a A and B	в	Membership Opp S 🔻	Equal	▼ Oper	n	
Filter Logic Add Logic to Perform Mult Valid Terms are AND, OR, a A and B						
Add Logic to Perform Mult Valid Terms are AND, OR, a A and B	ti Field Filtering and NOT. Any f	g, For Example "1 AND 2" or "(1 A ields not included in the Filter Lo	ND 2) OR 3", Where the N Igic will be treated as an A	lumber is Represented b ND operation.	by the Index Colum	1 abov
A and B						_
Apply Filter						

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:

	Index	Column	Operator	Value
EDIT REMOVE	A	Status	Equal	Membership Lead
EDIT REMOVE	В	Status	HasValue	
EDIT REMOVE	С	Membership Opp Status	Equal	Open
ADD NEW				
(A OR NOT B) A Apply Filter	decision and	Ţ		Represented by the Index Column abovition.
	decision and	Ţ		
	decision and	I		

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

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

• <u>Membership Opp Stats Equal Open</u>: 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 <u>EQUAL</u> to "Membership Lead" <u>OR</u> that have no value entered in the Status field, <u>AND</u> which have a Membership Opp Status <u>EQUAL</u> 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.

Home
Admin Dashboard
Communication
Campaigns
Campaign History
Unsubscribed List
Application Config
<ul> <li>Objects</li> <li>Contacts</li> </ul>
Properties
Security
Fields
Layouts I.
Views
Triggers
> Activities
> Dashboard
> Reports
> Documents
> Event Reservations
> Events
> Notes
> Registrants
> Member Groups

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.* 

	+ Add	New L	ayout						View Archived Layout
		Name	, 0	Default Layout		Description			
	(E)))	Conta	cts System Default	False		System Created	Layout for 'Contacts' Object		
	EDIT	Memb	er Layout	False					
	EDIT	Prospe	ect Layout	True					
ig	EDIT	New L	ayout	False					
		Guest	Layout	False					
	E011	Junior	Golf Lessons	False					
	EDIT	Golf SI	hop Layout	False					
	EDIT	Private	e Event Layout	False					
		Securi	ty Gate Layout	False					
		F&B		False					
	'iews + Add	New V	lew						View Archived View
	08.315		iew Name		Default View		Description		View Archived View
	08.315				Default View		Description System Created View for 'Cont	acts' Object	View Archived View
	+ Add	new)	Name					acts' Object	View Archived View
s	+ Add	new)	Name Contacts System Default		False			acts' Object	View Archived View
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#### You should now see the *Edit Layout* Screen:

Home Admin Dashboard	Edit Layout	Q
Communication Campaigns	Objects > Contacts > This Layout	
Campaign History Unsubscribed List	Properties	
Application Config	Name	
> Objects	Real Estate Prospect Entry I	
> Reports > Queries	Description	
> Integrations		
User Config	Object Default	
Users Role Groups		
	Security	
Setup Profile	Viewing Bights Can View Ret Jusput (Nat also have Object Viewing Rights for Nix Object Type)	
Application Settings	Inherit From Parent Object	~
Quick Links Application Links	Creation Rights	
Status Types Outgoing Addresses	Can Create New Objects using bits Lipsed Viewing Rights for this Lipsed and Object Viewing and Creation Rights for this Lipsed Viewing And Creation Rights for the Lipsed	~
Cutgoing Addresses	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 Delet Exiting Optext using this Layout (revenue Rights for this Layout and Object Vewing and Deletion Rights for this Object Type must also be enabled)	
	Inherit From Parent Object	Ψ.
	Header Text	
	Display View	
	Eat View	

Home	Com Delete Exciting Objects using this Layout (Verwing Rights for this Layout and Deletion Rights for this Object Type must also be enabled)
Admin Dashboard	Inherit From Parent Object
Communication Campaigns Campaign History Unsubscribed List	Bisplay View
Application Config > Objects > Reports > Queries > Integrations	Edit View
User Config Users Role Groups	Information Created System User 12/5/2016 4:20:53 PM
Setup Profile Application Settings Quick Links Application Links	Modified         System User 12/5/2016 420.53.PM           Save Properties         Save As New Layout   Archive This Layout
Status Types Outgoing Addresses	Layout Structure           Available Fields         +Add Section
	Activity History Ameritales Interest: Annual Dues Apparel Asis User Bag Storage Number: Ball Bascor Hits Beer Choice: Beverage Preference: Birthdald: Busines: City: Busines: State Busines: Street Address: Busines: Street Address: Busines: The Busines: Color Color Calego Contact Hame Desterity: Diving Buservation: Documents: Dirick Preference: Oniver Email: Est Head Court. Est. Price Per Head: Est. Revenue Cained: Event Data: First Name First Website Login: Food Preference: Oniver Email: Est Head Court. Est. Price Per Head: Est. Revenue Cained: Event Data: Cereit: Beservations: Documents: Dirick Preference: Oniver Email: Est Head Court. Est. Price Per Head: Est. Revenue Cained: Event Data: Cereit: Beservations: Event: Type: Expected Cose Month: Facebook Lizk: First Name First Website: Login: Food Preference: Oniver Grade: Glove: Size: Onf Lock: Origin Py: Grass: Cereit: Diractority: Berger Membership: Opp: Statu: Monthership: Login: Lead Source: Lizedon: Lizk: Member Humber Humber Humber Humber Fileson: List: Opp: Opp: Statu: Monthy: Dues Name Note: Name Note: Name Rever of texcon: List: Opp: Opp: Statu: Monthy: Dues Name Note: Name Note: Name Part of texcon: List: Opp: Opp: Statu: Monthy: Dues Name Note: Name Note: Name Part of texcon: List: Opp: Opp: Statu: Monthy: Dues Name Note: Name Note: Name Part of texcon: List: Opp: Opp: Statu: Monthy: Dues Name Note: Name Note: Name Note: Name Part of texcon: List: Opp: Opp: Statu: Monthy: Dues Name Note: Name Note: Name Part of texcon: List: Opp: Opp: Statu: Monthy: Dues Name Note: Name Note: Name Note: Name Part of texcon: List: Opp: Opp: Statu: Name Note: Name No

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**.

yout Structure		
Available Fields +Add Section		
Activity History Amenities Interest Annual Dues	Apparel Axis User Bag Storage Number Ball Beacon Hits Be	er Choice Beverage Preference Business Business City Business State
Business Street Address Business Street Address2	Business Title Business Zip Code Cart Child Name(S) Children	City City, State Club Affiliations Club Brand Clubhouse ID College
Contact Name Dexterity Dining Reservations D	ocuments Drink Preference Driver Email Est. Head Count Est.	Price Per Head Est. Revenue Gained Event Date Event Reservations Event Type
Expected Close Month Facebook Link First Website	e Login Food Preference Gender Glove Glove Size Golf Locker	r Group By Groups Guest ID Guest Of Guest Type Hand Handicap Holes
ID update? Initiation Fee Irons Irons Grade	Junior Age Last Website Login Lead Source LinkedIn Link Membe	er Number Member Referrer Member Type Membership Begins Membership Changes
Membership Interest Membership Opp Status Mont	hly Dues Name Notes Notes Number 1 Number 2 Number	of Lessons Left Opportunities Owner Phone Photo Preferred TeeTimes Prefix
rospect Information		
rospect Information	Column 2 LAST NAME	Column 3 DIRTHDATE
eal Estate Prospect Entry rospect Information Inst Name First Name Input	Last Name Last Name Input	BIRTHDATE 12/7/2016
rospect Information Juma I RST NAME	LAST NAME	BIRTHDATE
rospect Information	LAST NAME Last Name Input	BIRTHDATE 12/7/2016
rospect Information	LAST NAME Last Name Input	BIRTHDATE 12/7/2016

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.

Available Fields +Add Section						
Activity History Amenities Interest	Annual Dues Apparel	Axis User Bag Storage Number	Ball Beacon Hits Beer Choic	e Beverage Preterence Busine	ess Business City Business State	
Business Street Address Busine is S	treet Address2 Business Titl	e Business Zip Code Cart Chi	nild Name(S) Children City	City, State Club Affiliations C	Club Brand Clubhouse ID College	
Contact Name Dexterity Diring	Reservations Documents	Drink Preference Driver Email	Est. Head Count Est. Price Pe	r Head Est. Revenue Gained E	Event Date Event Reservations Event Type	
Expected Close Month Facebool Li	nk First Website Login F	Food Preference Gender Glove	Glove Size Golf Locker Gro	oup By Groups Guest ID G	uest Of Guest Type Hand Handicap	Holes
ID update? Initiation Fee Irors	Irons Grade Junior Age	Last Website Login Lead Source	Linkedin Link Member Number	er Member Referrer Member T	ype Membership Begins Membership Chan	nges
Membership Interest Membership C	pp Status Monthly Dues	Name Notes Notes Number	r 1 Number 2 Number of Lesso	ons Left Opportunities Owner	Phone Photo Preferred TeeTimes P	Prefix
al Estate Prospect Entry						
al Estate Prospect Entry ospect Information		Column 2		Column 3		
al Estate Prospect Entry ospect Information		Column 2 LAST NAME		Column 3 BIRTHDATE		
Save Structure						
al Estate Prospect Entry ospect Information		LAST NAME		BIRTHDATE		
al Estate Prospect Entry ospect Information		LAST NAME		BIRTHDATE		

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**.

[section header un	defined] 🃠		
Column 1	0		

	[section header	undefined] Section Properties	×
T	Title Addresses		
	Column Count 4		
	Collapsed on Display V	/iew Load 🔲	
0	Delete Section	Save Properties	
ar			
1			

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.

Addresses

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.

Available Fields +Add Section						
The second s					Charles Contraction Contractory Contractory	
Initiation Fee Irons Irons Grade Ju	inior Age Last Website Login	Lead Source LinkedIn Link	Member Number Member Referr	er Member Type Memb	bership Begins Membership Changes	
Membership Interest Membership Opp St	atus Monthly Dues Name	Notes Notes Number 1	Number 2 Number of Lessons Le	oft Opportunities Owne	er Phone Photo Preferred TeeTime	es Prefix
Primary Member Private Event Funnel Sta	ge Private Event Opp Status	Professional Designation Pros	spect ID Putting Grade Qualific	ation Referrals Referre	ed By Related Guests Related Members	rs
Relationship Root Member Number S	ales Close Date Sales Person	Shoe Shoe Size Short Gar	me Grade Spouse Spouse S	Spouse Birthdate Spouse D	Drink Preference Spouse Email	
Spouse Food Preference Spouse Phone	Status Street Address 2	Suffix Tee Times Tennis Res	ervations Total Website Logins	Toured Twitter Link U	pdated Vehicle Vehicle 2 Wedding	g Anniversary
Woods Grade Zip Code Record Id	Record Name Created I	Updated Archived Third Party	Source Third Party ID New HTI	ML Block Blank Space		
Woods Grade Zip Code Record Id Save Structure	Record Name Created U	Updated Archived Third Party	Source Third Party ID New HTI	ML Block Blank Space		
		Updated Archived Third Party	Source Third Party ID New HTI	ML Block Blank Space		
Save Structure	Record Name Created C	Updated Archived Third Party	Source Third Party ID New HTI	ML Block Blank Space		
Save Structure		Updated Archived Third Party	Source Third Party ID New HT	ML Block Blank Space		
Save Structure Real Estate Prospect Entry Prospect Information		Updated Archived Third Party	Source Third Party ID New HT	ML Block Blank Space		
Save Structure Real Estate Prospect Entry Prospect Information			Source Third Party ID New HT			
Save Structure Real Estate Prospect Entry Prospect Information admin IIBST NAME		Column 2	Source Third Party ID New HT	Column 1		
		Column 2 LAST NAME	Source Third Party ID New HT	Column 3 BIRTHDATE		
Save Structure Real Estate Prospect Entry Prospect Information diment TRST NAME First Name Input		Column 2 LAST NAME		Column 3 BIRTHDATE		
Save Structure Real Estate Prospect Entry Prospect Information Imma 1 Imma 1 Imma NAME First Name Input Addresses Imma 1	Zin Code	Column 2 LAST NAME		Column 3 BIRTHDATE		
Save Structure Real Estate Prospect Entry Prospect Information data	Zin Code	Column 2 LAST NAME		Column 3 BIRTHDATE	Colome d	

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**.

FIRST NAME			BIRTHDATE	
First Name Input			12/7/2016	
	PHONE			
( <b>(1</b> ) -	Phone Input			
	)···			
Column 2		Column 3		
CITY		STATE		
City Input		State Input		
	Column 2 CITY	LAST NAME Last Name Input PHONE Phone Input	LAST NAME Last Name Input PHONE Phone Input Column 2 Column 3 CITY STATE	

pous	e Food Preference	Spouse Phone	Status	Street Addres
ts G	Email Propert	ies		
	Read Only 🔲 Required 🔲 Hide Label 🗐			
	Save Properties	5		
_				
	Phone In	iput		

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 <u>only</u> 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.

	Modified System User 12/5/2016 4:20:53 PM	1				
nin Dashboard	Save Properties Save As New Layout Ar	rchive This Layout				
nmunication Ipaigns Ipaign History Iubscribed List	Layout Structure Available Fields +Add Section					
olication Config icts orts ries grations r Config rs	Member Number Member Referrer Member T Number of Lessons Left Opportunities Owne Qualification Referrals Referred By Relate	Type Membership Begin er Photo Preferred T red Guests Related Mem	eeTimes Prefix Primar	Membership Interest         Membership Opp State           Member         Private Event Funnel Stage         Private Event Funnel Stage           Member Number         Sales Close Date         Sale           Member Status         Street Address 2         Suffx	us Monthly Dues I vate Event Opp Status	
r Groups up ile lication Settings :k Links	Save Structure Real Estate Prospect Entry Prospect Information					
lication Links	Prospect mormation					
lication Links us Types	Column 1		Column 2		Column 3	
is Types			Column 2 LAST NAME Last Name Input		Column 3 BIRTHDATE 12/7/2016	
us Types	Column 1 FIRST NAME		LAST NAME		BIRTHDATE	
	Eduard 1 FIRST NAME First Name Input		LAST NAME		BIRTHDATE	

#### 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**.

	nformation								
	ect Information								
	Information								
Busine	ess Information								
lotes									
OTES									
	۹							Add New Notes	
	0	Note O		Created			Created By		
	VIEW EDI	T DELETE REMOVE test	ove test		11/8/2016 3:13:00 PM			System User	
	VIEW EDI	IT DELETE REMOVE test		11/10/2016 10:07:00 At	11/10/2016 10:07:00 AM Syste			System User	
	VIEW EDI	IT DELETE REMOVE test		12/1/2016 2:09:00 PM			System User		
Sales (	Opportunity Info	ormation							
Reven	ue Possibilities								
Activit	ties								
	HISTORY								
								Add New Activity	
	۹								
		Related Contact	Activity		Due Date 🛇	Activity Statu	S	Assigned To	
	VIEW EDIT DELET		phone ca		11/11/2016 3:00 PM	Closed			
	VIEW EDIT DELET	E REMOVE Coffey, Rick	Invite ric	k 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**.

Add New Field							
	Name	Column Name	Data Type	Description			
	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.

Home							
Admin Dashboard							
Communication	Layout Structure						
Campaigns	Available Fields +Add Section						
Campaign History Unsubscribed List							
	Group By Groups Guest ID Guest Of Guest 1	Type Hand Handicap Holes ID update? Initia	tion Fee Irons Irons Grade Junior Age Last Webs	site Login Lead Source LinkedIn Link			
Application Config	Membership Opp Status Monthly Dues Name Notes Number Number 2 Membership Changes Membership Interest Membership Opp Status Monthly Dues Name Notes Notes Number 2						
> Objects > Reports	Number of Lessons Left. Opportunities Owner Phone Photo Preferred Treatmes Prefix Primary Member Private Event Funnel Stage Private Event Opp Status. Professional Designation Prospect ID						
> Queries	Putting Grade Qualification Referrals Referred By Related Guests Related Members Relationship Root Member Number Sales Close Date Sales Reson Shoe Stoe Stoe Short Game Grade Spouse						
<ul> <li>Integrations</li> </ul>	Spouse Spouse Birthdate Spouse Drink Preference	Spouse Email Spouse Food Preference Spouse Phon		ennis Reservations Total Website Logins Toured			
User Config	Twitter Link Updated Vehicle Vehicle 2 Wed	ding Anniversary Woods Grade Record Id Record N	ame Created Updated Archived Third Party Sou	rce Third Party ID New HTML Block Blank Space			
Users Role Groups	Save Structure	Activities Section Properties	Activities Section Properties				
Role Groups		Title Activities					
Setup	Real Estate Prospect Entry	Column Count 1					
Profile Application Settings	Prospect Information		Collapsed on Display View Load				
Quick Links	Xelum 1		Column 3				
Application Links Status Types	FIRST NAME	Delete Section Save Properties	BIRTHDATE				
Outgoing Addresses	First Name Input		12/7/2016				
	Addresses	Column 2					
	STREET ADDRESS	CITY	STATE	ZIP CODE			
	Street Address Input	City Input	State Input	Zip Code Input			
	BUSINESS STREET ADDRESS	BUSINESS CITY	BUSINESS STATE	BUSINESS ZIP CODE			
	Activities						

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"**.

Real Estate Prospect Entry					2
Prospect Information					
FIRST NAME		LAST NAME		BIRTHDATE	
First Name Input		Last Name Input		12/7/2016	
Addresses					
STREET ADDRESS	CITY		STATE		ZIP CODE
Street Address Input	City Input		State Input		Zip Code Input
BUSINESS STREET ADDRESS BUSINESS CITY			BUSINESS STATE		BUSINESS ZIP CODE
Business Street Address Input Business City		Input Business State Input			Business Zip Code Input
ACTIVITY HISTORY					
Record Name Object View					
·····					
Edit Save Save As New Cha		Delete			

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:

oto	Preferred TeeTimes	Prefix	Primary Member	Priva
	Activity History P	roperties	5	
	Read Only Required			
	Hide Label Display Type Activities Vi Layout Object Default	iew - Grand I	Key ▼	
	Save Properties			
			0 T 4	
			517	HE.

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**

- 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.
- 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.