

CUSTOMIZE YOUR FIELDS AND LAYOUTS

Step 1 Define your fields

Step 2 Customize your layouts

Note: Changing the name of a field in the Define Fields box does not change the name of that field on your layout. After redefining a field name, you must edit your layout to reflect this change.

CREATE A NEW FIELD

• Select Tools and Define Fields

efine Fields 🕒 🛔 Home			X
Field Tasks Create new field Edit field Delete field Field Security	Create, edit or de Create a new field, or select Field Tasks menu to the left View fields for: Contacts	elete fields ta field from the list to edi	it or delete. Select the desired action in the
List Tasks	Field Name	Field Type	Linked to Company Field
Manage drop-down lists Manage product list Manage process list Details	Address 1 Address 2 Address 3 Atemate Extension Atemate Phone	Character Character Character Character Phone	Address 1 Address 2 Address 3
Name: Company Type: Character Record Type: Contacts Created: 5/24/2006 System Field	Birth Date City Company Contact Country Customer ID	Annual Event Character Character Character Character Uppercase	City Company Country Customer ID
		~ ·	•
_		_	Qose
 Choose View fields for In the Field Tasks box, Type in the new field n Select an option from the second se	: Contacts, Companies, o click Create new field name and select a data ty the Customize field beha	r Groups /pe. vior section:	

Define Fields	
🕒 Back 🕗 😤 Home	
	Enter field name and type
	For each field you create or edit, you can select options to describe the field or specify how the field functions.
	Field name:
	New Field 1
	Field data type:
	Character 💌
	Customize field behavior
	Allow Blank - This field can accept empty values
	Generate History - Track changes made to this field's value in history
	Primary Field - Copy this field when duplicating the record
	Use drop-down list:
	< <u>B</u> ack <u>N</u> ext > <u>Finish</u> <u>C</u> ancel

- Allow Editing enabled by default. Disabling this option will prevent other users from changing the data in this field
- **Allow Blank** enabled by default. Disabling this option will generate an error message if this field is left blank in a new record.
- **Generate History** enabling this option will create a history entry if the data in this field is changed.
- **Primary Field** when duplicating the record, the data in this field will be copied to the new record.
- Use drop-down list you must have a drop-down list prepared before enabling this option (see next page)

Select Next

Back 🥑 <u>I</u> Home	Customize field behavior Specify formats or rules for entering data in the field.	
	Default <u>v</u> alue (optional):	
	Field <u>fo</u> rmat (optional):	
	Field Length: 50	
	< <u>Back</u> <u>N</u> ext > <u>Finish</u> <u>Cancel</u>	

- Select a Default Value if required
- If your data needs to be entered in a certain format use the Field Format
- Use the following placeholders to specify your field format:
 - o # numeric
 - o @ alphabetic
 - o % alphanumeric
 - Set the field length remembering not to underestimate your requirements
- Select Next to Set field triggers. For example you can set an Activity Series to be launched when a user moves onto or away from this field.

Set field triggers Set a trigger on the field to automatically schedule an activity series, launch a program, or launch a web site when entering, exiting, or changing information in the field.
When changing a field, launch Activity Series New Customer
When entering a field, launch
When leaving a field, launch
< <u>B</u> ack <u>N</u> ext > <u>F</u> inish <u>Cancel</u>

CREATING A FIELD WITH A DROPDOWN

Before you can add a drop down list to a new field, you must create the list. Once the list has been created, you can edit the field to add the list of values.

TO CREATE A DROP-DOWN LIST

- From Tools go to Define Fields.
- Select Manage drop-down lists from List Tasks



- Click Create drop-down list.
- Type in a name for your drop-down
- The Define Fields Enter drop-down list values dialog box appears.

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	Enter drop-down list name and type	
	Drop-down list name:	
	Regions	
	Type:	
	Character	
	Description(optional):	
	Allow users to edit items in this list	
	Automatically add new items users enter to the list	
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Note: You cannot enable the Automatically add new items... option without enabling the Allow users to edit... option.



tTasks 🄝	Enter drop dou	m list values	
oort drop-down list items	Enter arop-aov	In fist values	
port drop-down list items	Value	Description	Add
	North		
	South		<u>D</u> elete
	East		
	West		

Click the Add button to add values for your drop-down list. Enter a Description for each value if desired.

Once your drop-down values and descriptions have been entered, click Finish.

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-down list tasks	۲	Create edit or del	ete dron-da	wm lists	
e drop-down list		Creater early of der	ete urop ut	en delete. Colorithe desired action in the	
rop-down list		Drop-down list tasks menu to th	ie left.	of delete, belect the desired action in the	
e dron-down list		-			
arop dominist		List Name	Туре	Description	^
F	8	Company ID/Status	Character	The categorization of a Company	
legions		Contact ID/Status	Character	The categorization of a Contact	
aracter		Countries	Character	Master list of Countries	
10/17/2007		Departments	Character	Departments where Contacts work	
		Industry	Character	The Industry associated with a C	
		Jobtitles	Character	Jobtitles which can be assigned t	
	. U.	Last Results	Character	The Last Results with a Contact	Ξ
		Opportunity Close Reasons	Character		
		Opportunity Competitors	Character		
		Opportunity Lead Source	Character	The source which lead to the cre	
		Payment Method	Character		
		Product Types	Character		
		Product Unit of Issue	Character		
		Referred By	Character	Who the lead was Referred By	
		Regions	Character		-

To add this list to an existing field or to create a new field for this list, click the Home button and find the field you want to add the drop down list to.

Select Finish

FIELD FACTS

• You can change the name of any field.

CUSTOMISE FIELDS AND LAYOUTS- 2010

You will not be able to include special characters (such as <, >, \$, ? or :) in a field name. •

DESIGNING LAYOUTS

- From the Tools menu, go to Design Layouts •
- Click the appropriate layout type: Contact, Group or Company.

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Toolbox ×	•	$\underline{\mathbf{A}} \cdot \mathbf{B} \mathbf{I} \underline{\mathbf{U}} \equiv \underline{\mathbf{z}}$	[플 ြ 丣 북]	· 4· E· 6·	
Drawing	CH Tech	ONE			
Field	Company	Company	 Address 	Address 1	
Revinter	Contact	Contact	•	Address 2	
T Field	Salutation	Salutation 👻 Key Conta	ct.	Address 3	•
Memo Field	Title	Title	City	City	
Picture Field	Department	Department	 State 	State 🔹	
Record Manager	Phone	Phone 🔹	ZIP Code	ZIP Code 🔹	
G Access	Mobile	Mobile Phone 🔻	Country	Country	
	Fax	Fax Phone 🖃 ON	Web Site	Web Site	•
	Alt	Alternate Phone	E-mail	E-mail	•
	ID/Status	ID/Status	•		
	Referred By	Referred By	•	· · · · · · · · · · · · · · · · · · ·	Last Edited
	Last Reach	Last Reach 💌 Last Meeting	Last Meeting 💌 Last I	Letter Letter Date 💌	LastE-mail LastE-mail

The Layout Designer appears

DESIGN TOOLS

The Layout Designer's Toolbox contains two buttons Drawing and Field.
DRAWING TOOLS

Pointer

The Pointer tool will allow you to select the fields in the layout.

Note: If you hold your Shift or Ctrl keys, you will be able to select multiple fields and field labels. You can also select multiple fields and/or field labels by clicking outside of a field and then dragging across the area containing the fields and/or field labels.

When you click a field or a field label to select it, a thick black border surrounds the field.



Note: The small squares within this black border are called sizing handles. When you place your cursor over one of these sizing handles, your cursor will change to a two-way arrow; allowing you to click and drag the field to a different size.

When you place your cursor over other parts of the border, a four-way arrow will appear; allowing you to click and drag the field to a new position.

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A Text
The Text tool will allow you to enter permanent text into your layout.
Reg. Image
The Image tool will allow you to insert a picture into your layout. Click the image tool and draw out a field on your layout that will contain this image. An Open dialog appears, for you to Browse for your picture file.
Rectangle
The Rectangle tool will allow you to drag a rectangular shape into the layout.
C Ellipse
The Ellipse tool will allow you to drag a circular shape on the layout.
FIELD TOOLS:
X Field
The Field tool will allow you to insert additional Contact, Company or Group fields into the layout.
Temo Field
The Memo Field tool will allow you to insert a memo field into your layout.
YesNo Field
The YesNo Field tool will allow you to insert a yes/no field into your layout. The YesNo field appears as a small square and will either hold a check mark or will be blank. A field must be defined as a YesNo Field before it can be added to the layout.
Record Manager
The Record Manager tool will allow you to insert the Record Manager field into your layout. The record manager reflects the database User that controls the contact record.

TO ADD A FIELD TO YOUR LAYOUT

- Select the Field button on the left
- Draw out the field on your layout. Your mouse pointer turns into a crosshair and the Select Field dialog box appears:

Select Field Please choose a field: Address Name Alternate Extension Annual Contracts Customer ID Fax Extension First Name First Purchase Home Address 3 Home Extension Last Attempt Last Edited By Last Name Last Yrs Purchases Middle Name Mobile Extension			
✓ Include a label New Field	Add	<u>C</u> lose	

Note: To add a brand new field, select the New Field button to launch the Define Fields wizard and begin the process of defining a new field.

PROPERTIES DIALOG BOX

City (Field)		-		
2 2 🖆				
Appearance				
Background Color	Window			
Border Style	Fixed3D			
Font	Tahoma, 8pt			
Font Color	ControlText			
Text Alignment	Left			
Behavior				
Enter Stop Enabled	True			
Enter Stop Index	4			
Tab Stop Enabled	True			
Tab Stop Index	13			
🗆 Data				
Field Value	City			
Layout				
Location	392, 93			
	176, 21			
Appearance				

Select View Properties Window or press F4 to show the Properties window.

You can modify the properties for any data Field, Text field, Picture, Rectangle, Ellipse, Tab or Panel (background) from this window.

For example: If your picture does not show correctly, go to the Behavior Properties and change the Size Options to Normal.

TAB STOPS

To view the Tab Stops click the View menu and Show Tab Stops. In this view you will not be able to view the Toolbox or the Properties windows. Go back to the View menu again, and then deselect Show Tab Stops to return to Design Layout view.

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CH Tech	ONE			
Company	Company 🖉 🕢	Address	Address 1	▼ 10
Contact	Contact 🗨 🚺		Address 2	 ■ 11
Salutation	Salutation 🕞 🛛 🐨		Address 3	- 12
Title	Title 4	City	City	1 3
Department	Department 🗾	State	State 🚽 🚺	
Phone	Phone 🗣 🔓	ZIP Code	ZIP Code 🚽 15	
Mobile	Mobile Phone	Country	Country	- 16
Fax		Web Site	Web Site	- 17
Alt	Alternate Phone 👻 9		E-mail	■ 18
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TO RESET THE TAB STOPS

- From View Tab Stops select Clear.
- Select each field in turn to add your own tab tops.
- Alternatively, you can right click on the field and then type in the new index from the Set Index box.

Set Index	x
Enter the new inde	ex:
4	
	OK Cancel

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	ACT DATA	ACT DATA TYPES				
	Field type	Data allowed in fields				
	Address	Alphanumeric characters (letters, numbers, or symbols).				
	Annual Event	Events that recur annually, formatted according to the date settings in the Microsoft Windows Regional Settings control panel. The field contains a drop-down date selector.				
	Character	Alphanumeric characters (letters or numbers).				
	Currency	Numbers formatted according to the currency settings in the Windows Regional Settings control panel.				
	Date	Dates formatted according to the date settings in the Windows Regional Settings control panel. The field contains a drop-down date selector.				
	Date/Time	Date and time formatted according to the date and time settings in the Windows Regional Settings control panel. The field contains a drop-down date/time selector.				
	Decimal	Numbers and decimal points.				
	E-mail	Alphanumeric characters. The address entered in the field becomes an active link to open an e-mail message.				
	Initial-Caps	Alphanumeric characters, formatted with a capitals at the beginning of each word.				
	Lowercase	Alphanumeric characters, formatted in all lowercase letters. The Shift and Caps Lock keys have no effect.				
	Memo	Alphanumeric characters (letters, numbers, or symbols).				
	Number	Numbers only. Letters typed in this field are ignored.				
	Phone	Numbers only.				
	Picture	Pictures in .bmp, .gif, .jpg, .png, .ico, .emf, or .wma format.				
	Time	Time of day formatted according to the time settings in the Windows Regional Settings control name. The				

ime of day formatted according to the time settings in the Windows Regional Settings control panel. The field contains a drop-down time selector.

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	Uppercase	Alphanumeric characters, formatted in all uppercase letters. The Shift and Caps Lock keys have no effect.	
	URL Address	Alphanumeric characters. The address entered in the field becomes an active link to a URL.	
	Yes/No	Check box. If the check box is selected, it has a "Yes" value. If the check box is cleared, it has a "No" value.	