

# CUSTOMISE FIELDS AND LAYOUTS 2010



## CUSTOMIZE YOUR FIELDS AND LAYOUTS

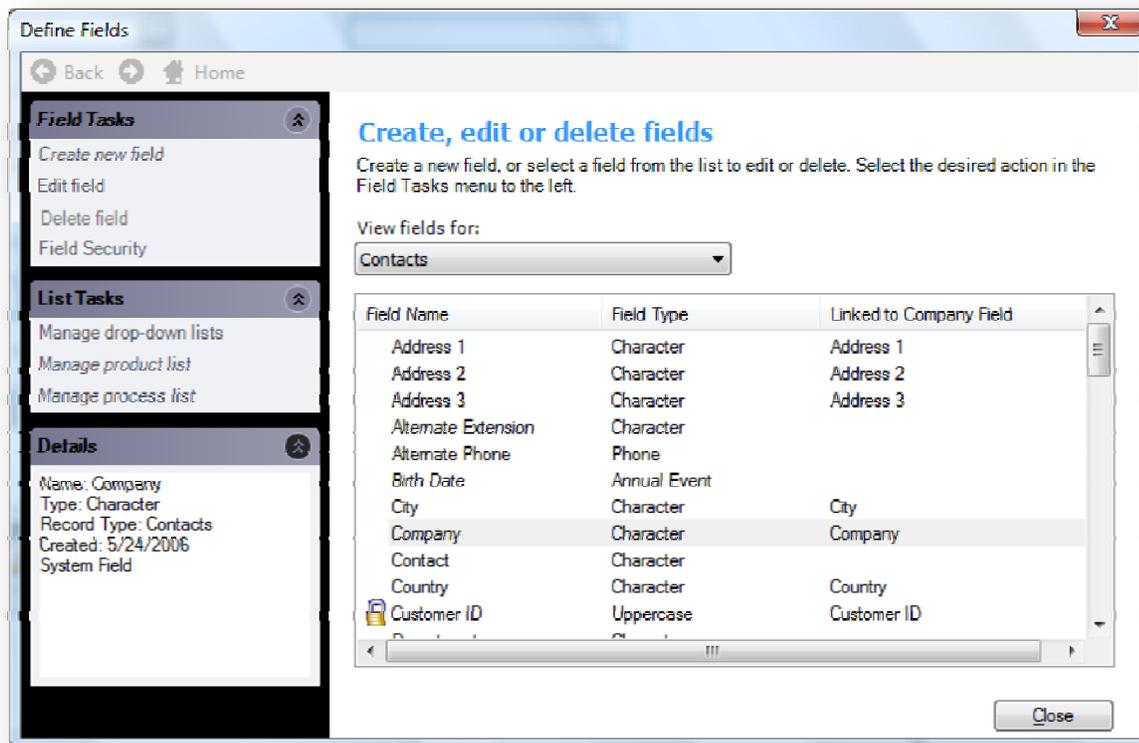
**Step 1** Define your fields

**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



- Choose View fields for: Contacts, Companies, or Groups
- In the Field Tasks box, click Create new field
- Type in the new field name and select a data type.
- Select an option from the Customize field behavior 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:

< Back Next > Finish Cancel

- **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

**Define Fields**

Back Home

### Customize field behavior

Specify formats or rules for entering data in the field.

Default value (optional):

Field format (optional):  
@@ @@ @@ @@

Field length:  
50

< Back Next > Finish Cancel

- 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:
  - # - numeric
  - @ - alphabetic
  - % - 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.

The screenshot shows a window titled "Define Fields" with a "Set field triggers" section. The window has a "Back" button and a "Home" icon. The "Set field triggers" section includes a description: "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." Below this are three sections for setting triggers:

- When changing a field, launch:** A dropdown menu is set to "Activity Series" and a text box contains "New Customer".
- When entering a field, launch:** A dropdown menu is set to "None" and the text box is empty.
- When leaving a field, launch:** A dropdown menu is set to "None" and the text box is empty.

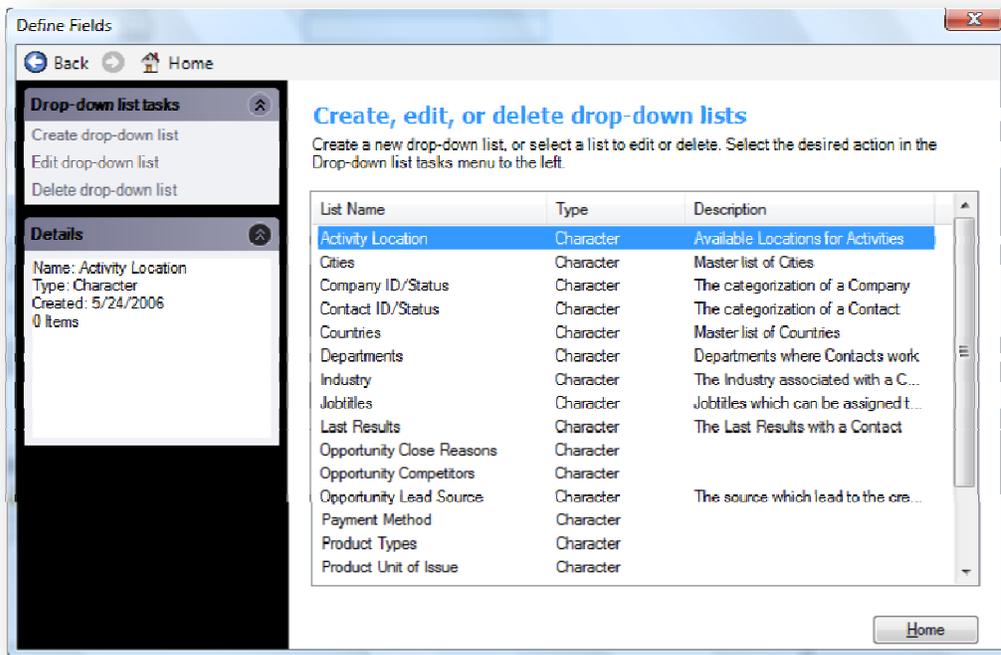
At the bottom of the window are four buttons: "< Back", "Next >", "Finish", and "Cancel".

## CREATING A FIELD WITH A DROPDOWN

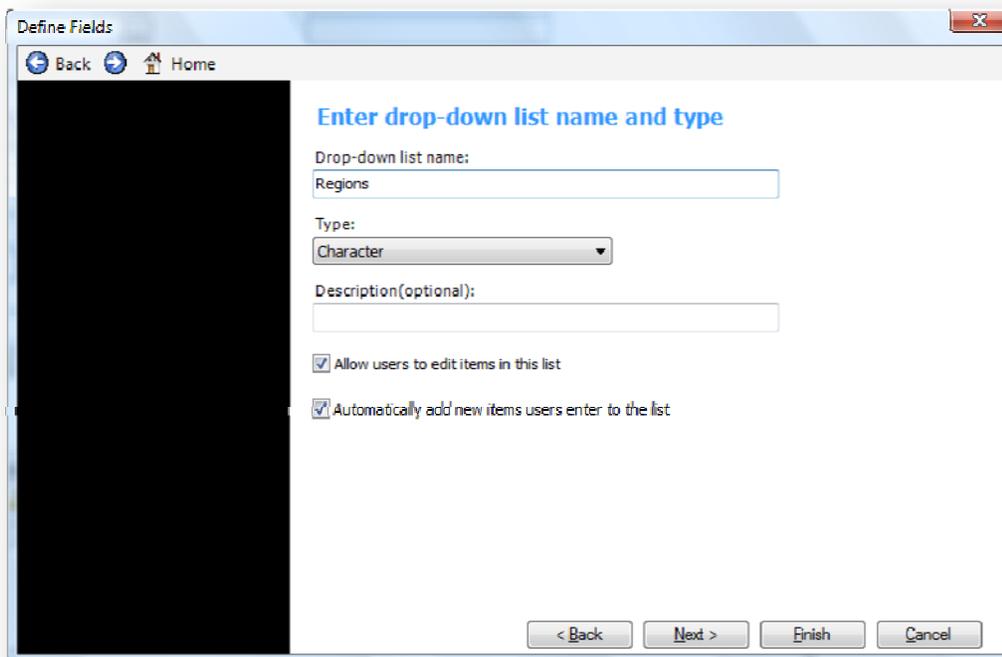
Before you can add a drop down list to a new field, you must create the list. Once the list has been created, you can edit the field to add the list of values.

## TO CREATE A DROP-DOWN LIST

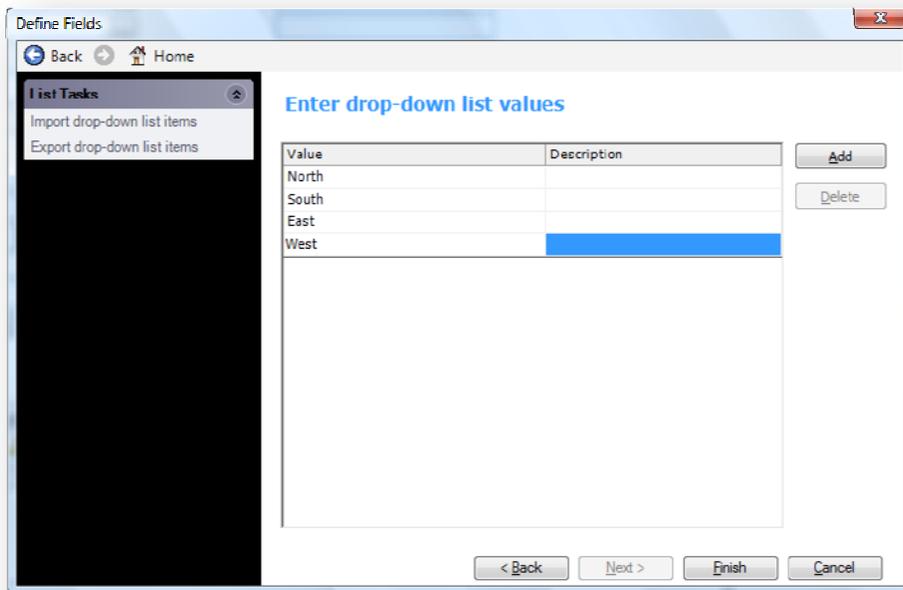
- From Tools go to Define Fields.
- Select Manage drop-down lists from List Tasks



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

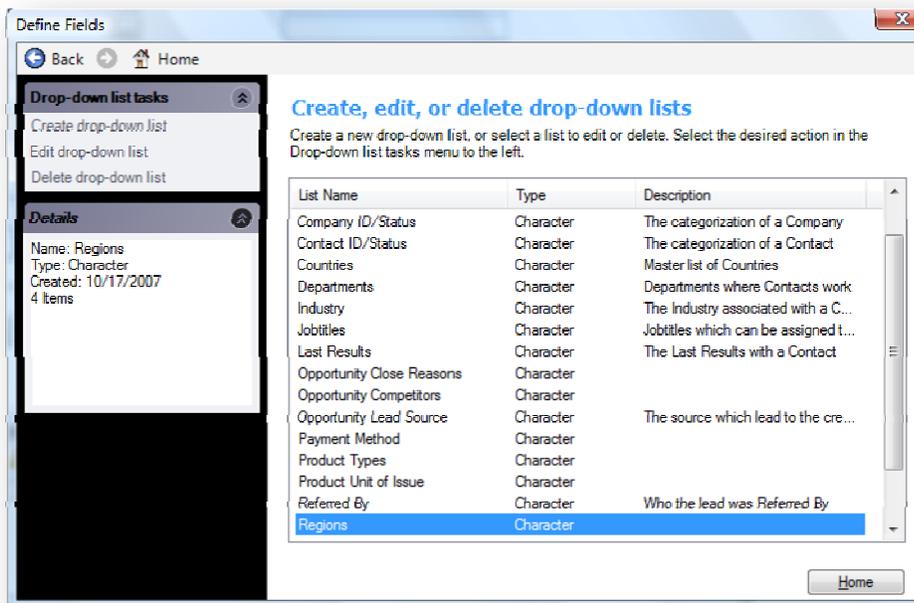


**Note:** You cannot enable the *Automatically add new items...* option without enabling the *Allow users to edit...* option.



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.



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

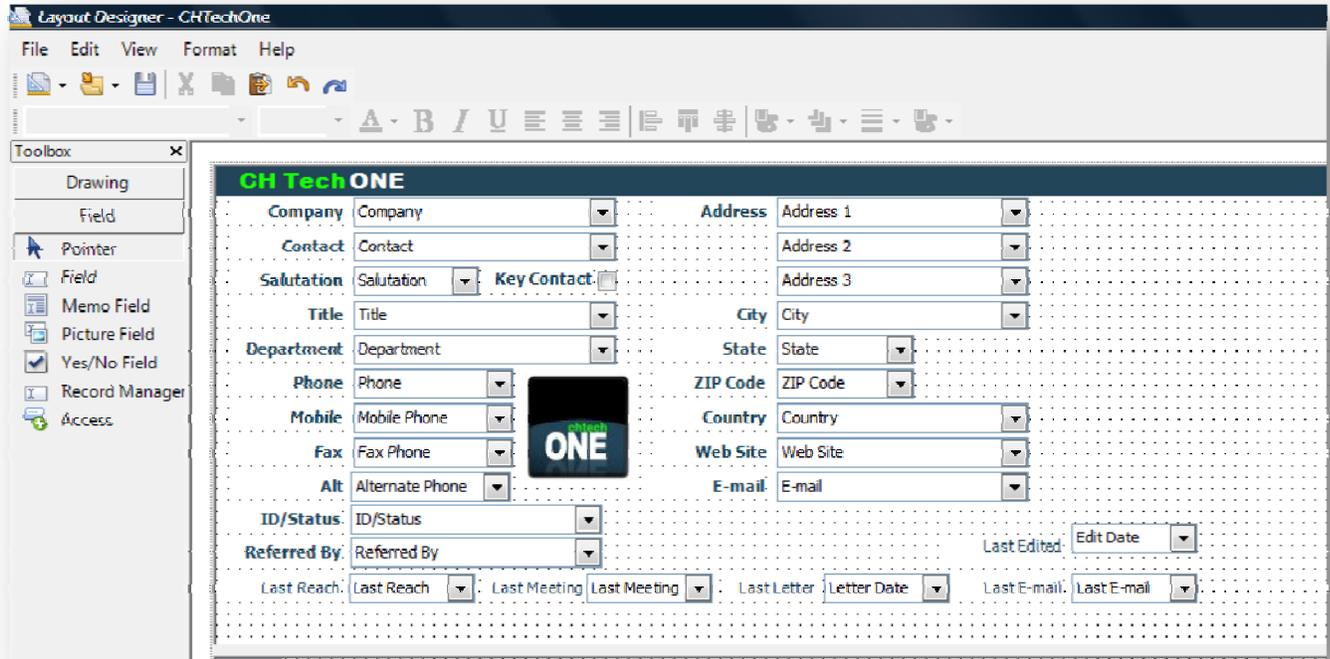
## FIELD FACTS

- You can change the name of any field.

- 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.



The Layout Designer appears

## DESIGN TOOLS

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

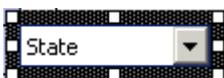
### DRAWING TOOLS



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

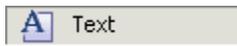
**Note:** If you hold your Shift or Ctrl keys, you will be able to select multiple fields and field labels. You can also select multiple fields and/or field labels by clicking outside of a field and then dragging across the area containing the fields and/or field labels.

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

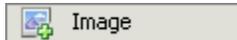


**Note:** The small squares within this black border are called sizing handles. When you place your cursor over one of these sizing handles, your cursor will change to a two-way arrow; allowing you to click and drag the field to a different size.

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.



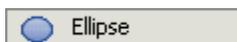
The Text tool will allow you to enter permanent text into your layout.



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.



The Rectangle tool will allow you to drag a rectangular shape into the layout.



The Ellipse tool will allow you to drag a circular shape on the layout.

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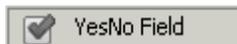
#### FIELD TOOLS:



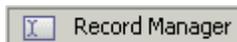
The Field tool will allow you to insert additional Contact, Company or Group fields into the layout.



The Memo Field tool will allow you to insert a memo field into your layout.



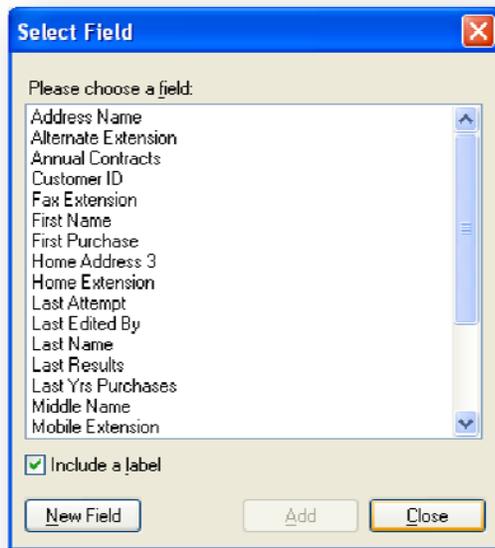
The YesNo Field tool will allow you to insert a yes/no field into your layout. The YesNo field appears as a small square and will either hold a check mark or will be blank. A field must be defined as a YesNo Field before it can be added to the layout.



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.

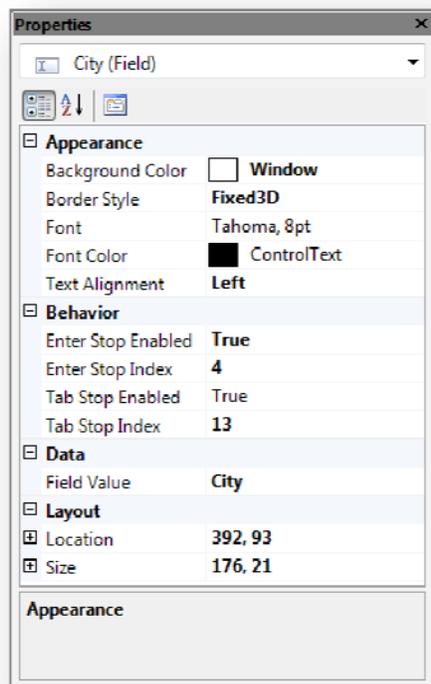
## TO ADD A FIELD TO YOUR LAYOUT

- 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:



**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



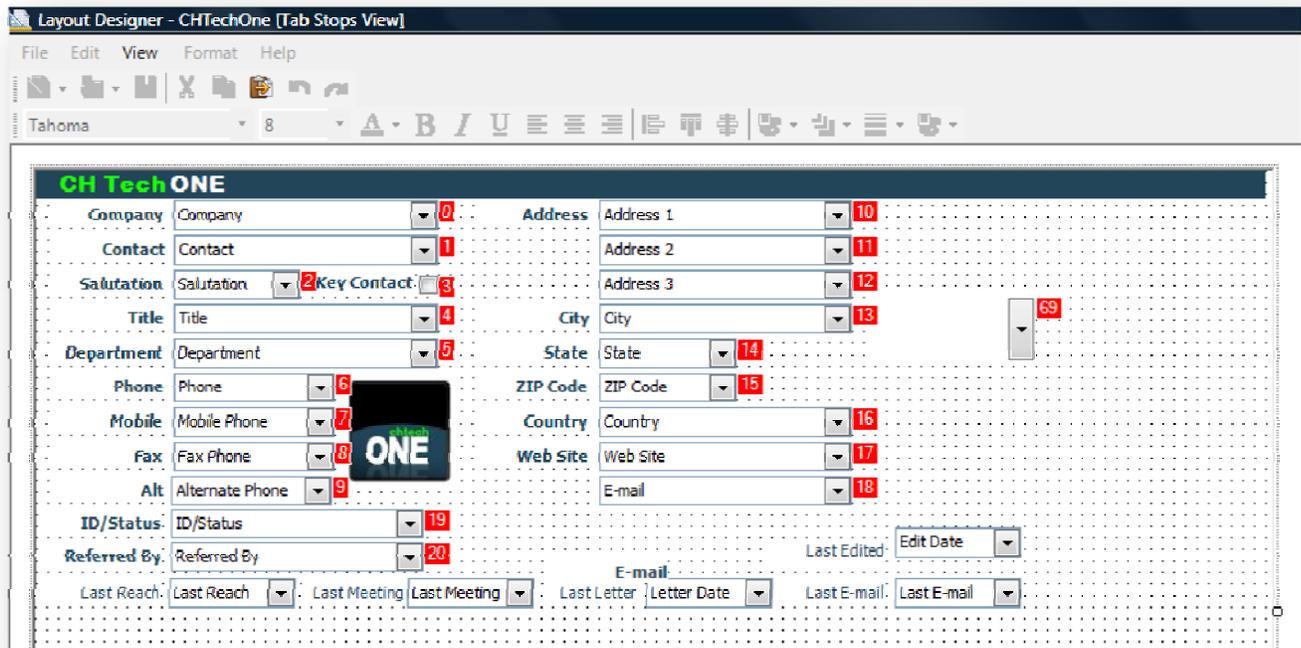
Select View Properties Window or press F4 to show the Properties window.

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.

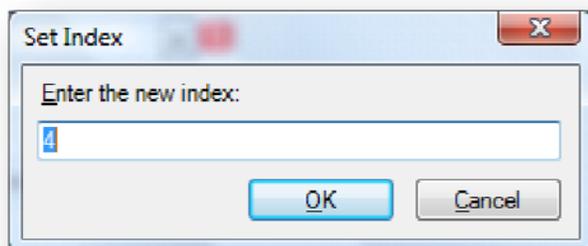
## TAB STOPS

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.



## 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.



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 panel. The field contains a drop-down time selector.

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.