PlanPlus™ Online

# Custom Fields and Page Layouts

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# Page Layouts & Custom Fields
## Definitions

**Summary:** Shows all records within a specific view

**Detail Page:** The detail page allows the user to view all fields and custom fields associated

**Create New:** Allows user to create a new record

**Record Types:** Records are individual entries in the database. I.e. John Doe is a Contact Record. Record types include Organization, Contact, Opportunity, Task, Activity, and User.

**Indexed fields:** Some fields are already built into PlanPlus Online; while they cannot be deleted the Admin can change the values. Contact Classification is an example of an indexed field.

**Custom Fields:** Fields that are created to fit the specific needs of a user. If you were a lawyer and needed a field for "Case #" you would custom build it since it is specific to your needs.

**Group Fields:** Many times fields will be related to each other and would need to be grouped together. With PlanPlus Online, group fields can be used when updating a sales process to ensure correct information is filled out when reaching a sales process.

## Lesson Objectives: Creating a new Custom Fields

1. Creating new Custom Fields
    a. Learning the different custom field types

2. Editing Values of Indexed Fields

3. Creating a Page Layout
    a. Finding Page Layouts
    b. Opportunity Page Layouts

4. Editing Placement of a Custom Field
    a. Page Layout Workbook

5. Page Layout Editor

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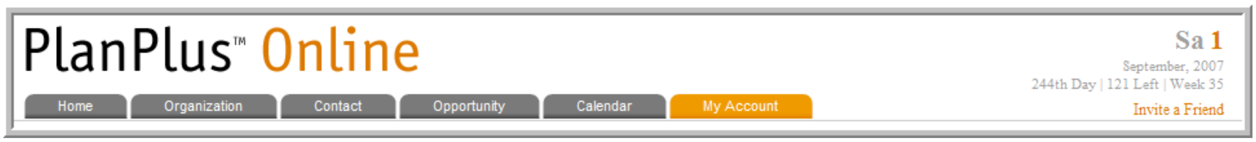
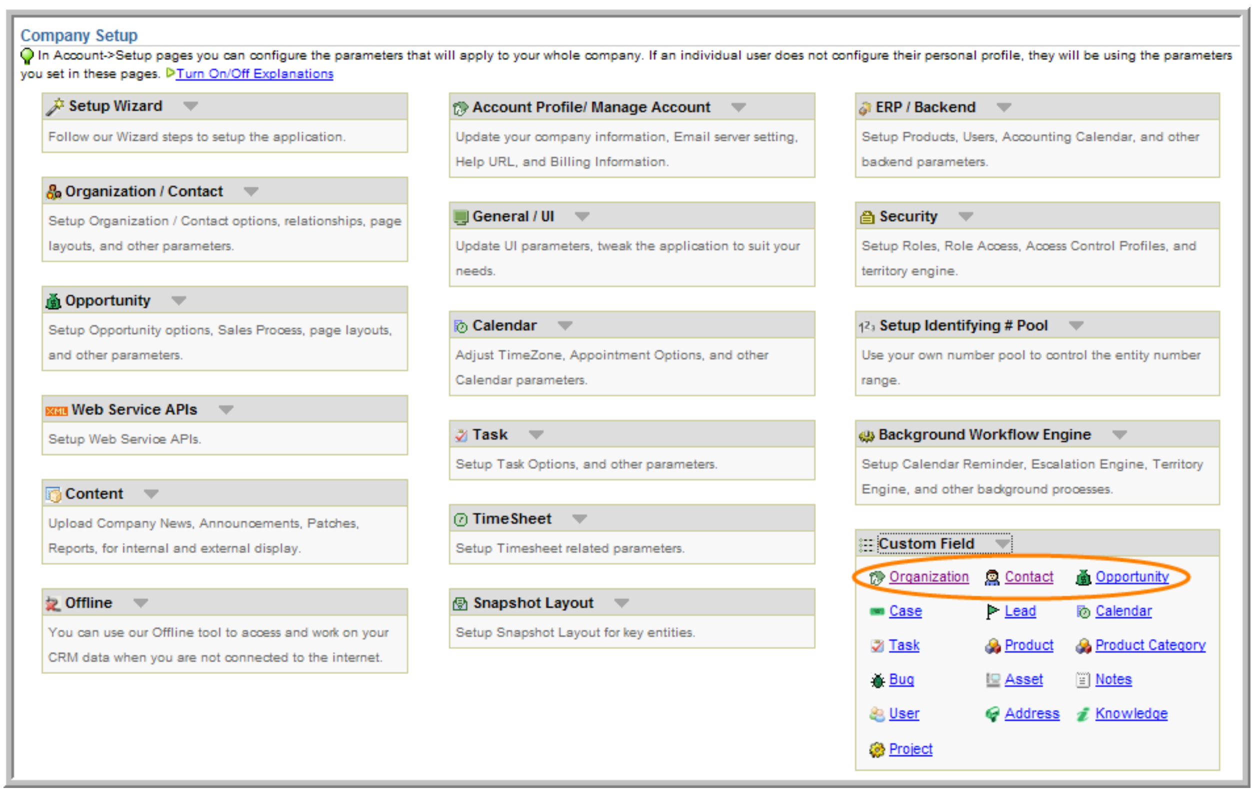
## Lesson

### Custom Fields

One of the great new features in PlanPlus Online is the ability to have custom fields. Adding custom fields in the Contact tab, for example, allows you the ability to quickly sort your customers on any given custom field. The software can also be customized in various ways to help you track unique information and processes for your particular line of work.

1. Click tab "My Account"
2. From the bottom right side of the screen, choose "Custom Fields"
3. Choose which record type you wish to add a custom field.



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## Creating a new Custom Field

The Custom fields menu allows the Administrator to view all custom fields available to use on the record's page layout.

1. Scroll to the bottom of the Custom fields list until there is an open field line
2. Enter a name for the field, Type a description
2. Choose the Field Type
3. Click "Submit"

Do not worry about running out of field lines, when "Submit" is clicked another 5 lines of new fields show up.

If you need to delete a field, simply make it Inactive by clicking the "Inactive" check box.

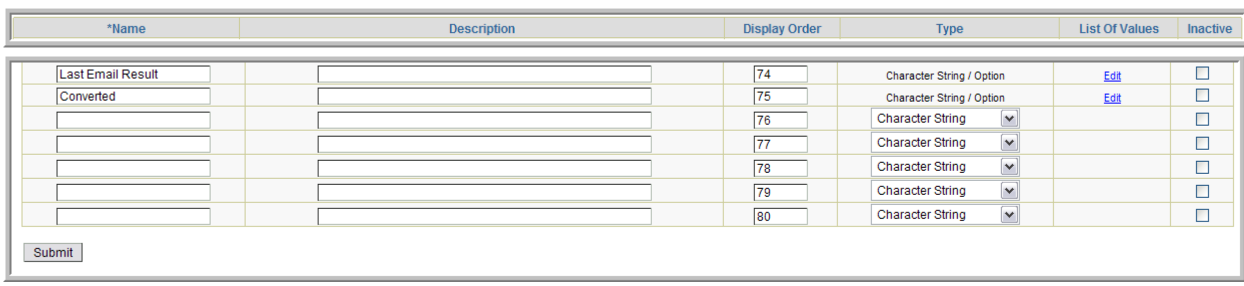


Fig 2.2

### Custom Fields Types

Use this matrix to understand the various field options.

| | |
|---|---|
| Character String<br>Color Code<br>Date<br>Entity - Contact<br>Entity - Organization<br>Entity - User<br>File / Link<br>Hour - Minute<br>Long Text<br>Multiple String Values<br>Number<br>Yes/No Checkbox<br>Number/Calculated<br>Time/Calculated<br>String/Calculated<br>Value / Period | **Character String:** is a custom field capable of storing up to 255 characters of information / Allows the user to choose an item from a list of options.<br>**Color Code:**<br>**Date:** Enforces the stored data to be an actual date, entered in dd/mm/yyyy format.<br>**Entity- Contact:** Shows an Icon that Links to a Contact Record<br>**Entity- Organization:** Shows an Icon that links to a Organization Record<br>**Entity- User:** Shows and Icon that links to a database User<br>**File / Link:** provides a link to view WebPages or Files. File size limit is 5MB.<br>**Hour – Minute:**<br>**Long Text:** Stores large amounts of text.<br>**Multiple String Values**: Presents the user with a list of options from which to choose. Users are able to choose more than 1 item from the list.<br>**Number:** Enforces the stored data to be a number. Number fields can be Calculated.<br>**Yes/ No Checkbox:** Displays a checkbox interface. Places either 'yes' or 'no' in database field.<br>**Number/ Calculated:** Calculates number fields together.<br>**Time Calculated:** Calculates a series of time clocks and number string fields together.<br>**String / Calculated:** Calculates string fields together.<br>**Value / Period:** Detail Applet for totaling Opportunity Values by Month, Quarter and Year. |

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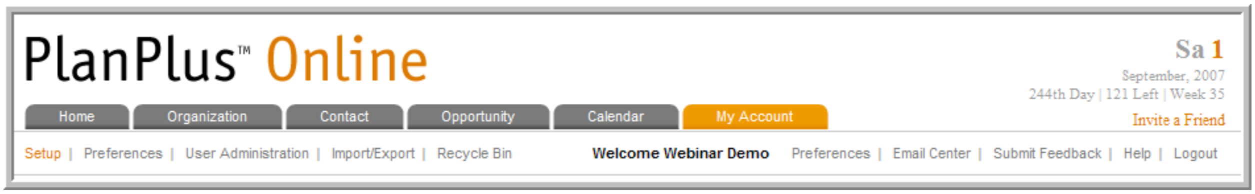
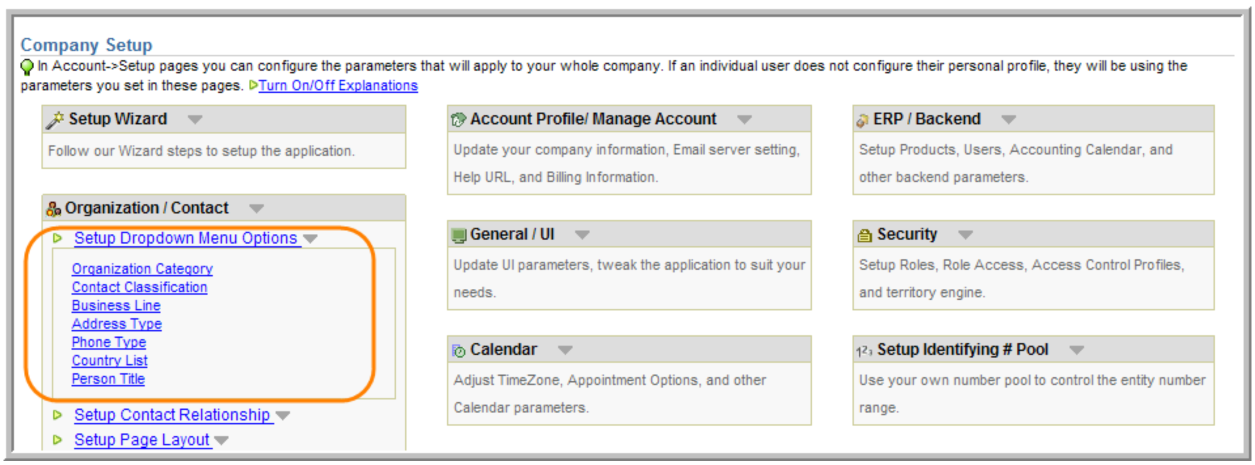
## Editing Values of Indexed Fields

Some fields are already built into PlanPlus Online; while they cannot be deleted the Administrator can change their values. Contact Classification is an example of an indexed field.

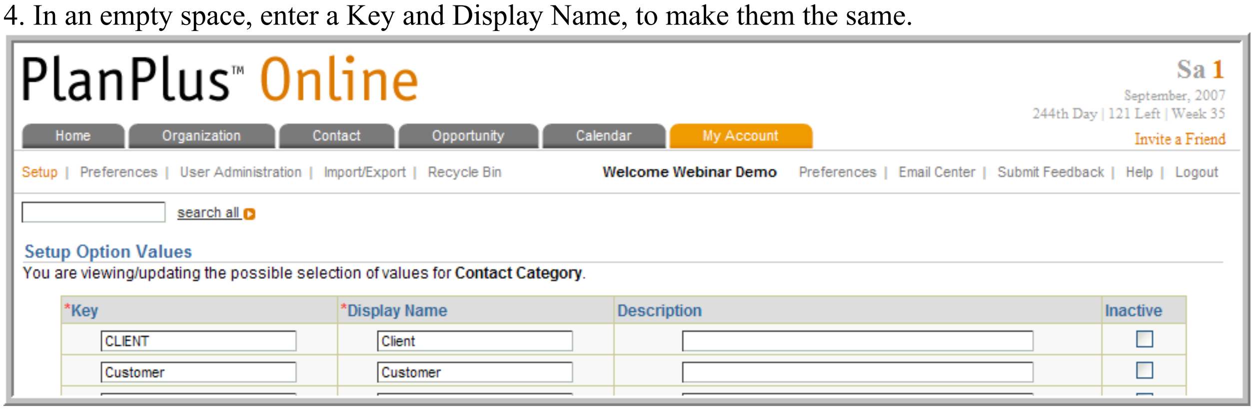
1. From the main tabs, Select “My Account”
2. Select “Setup Dropdown Menu Options”
3. Select which indexed field you would like to edit




In the tutorial we will select “Contact Classification.”

4. In an empty space, enter a Key and Display Name, to make them the same.




To delete classification simply make it inactive by clicking the “Inactive” checkbox.

**Important**The database requires Organization, Contact, and Opportunities to have certain fields, so when creating a new page layout be sure to include these; they are indicated with an asterisks (*).  When creating Page layouts also remember that Records link to each other, and information about a Record's Company can be kept separate from their Personal Information.

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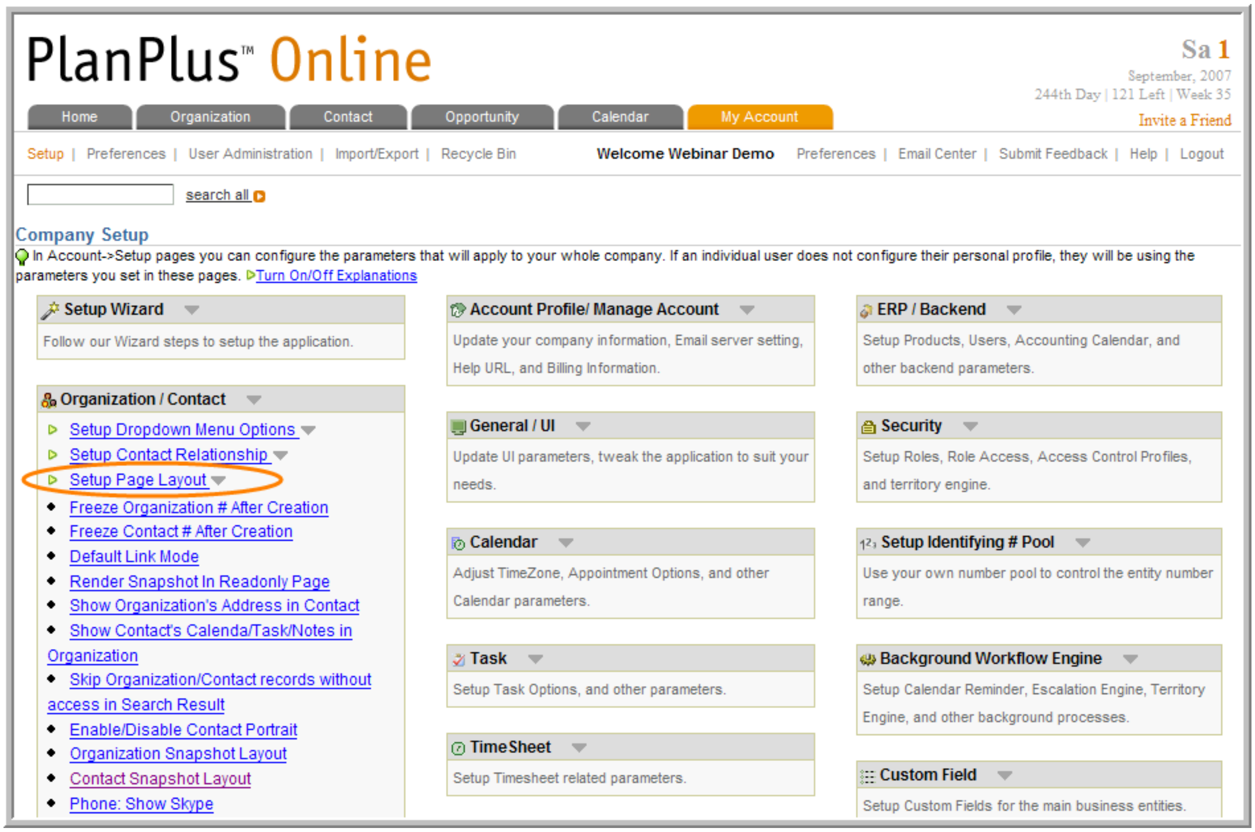
## Page Layout

Once you have created a new Custom field, you can display it to the detail of a Record with Page layouts. Page Layouts display custom fields to the database.

1. Click “Account” from the Main tabs
2. On the middle left of the screen, click “Organization/ Contact”
3. Select Setup Page Layout



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## Page Layout

Choose the appropriate Record Type for the field to be displayed. By clicking "Organization," these fields will be displayed in the Detail of an Organization Record.

| | |
|---|---|
|  | **Setup Dropdown Menu Options**: Changes required fields such as Organization Category and Contact Classification<br><br>**Setup Contact Relationship**: How contacts are related to one another; i.e. Contact to Organization or Contact to Contact.<br><br>**Setup Page Layout**:<br>Displays Custom fields to Organization and Contact Records.<br>**Organization**: Changes Organization Detail<br>Display<br>**Contact:** Changes Contact Detail Display |



(Note: It is unnecessary to click on anything below because the Main Org. / Contact screens listed will edit all of the display tabs. Renaming the Field Sub tabs is within the Record Detail.)

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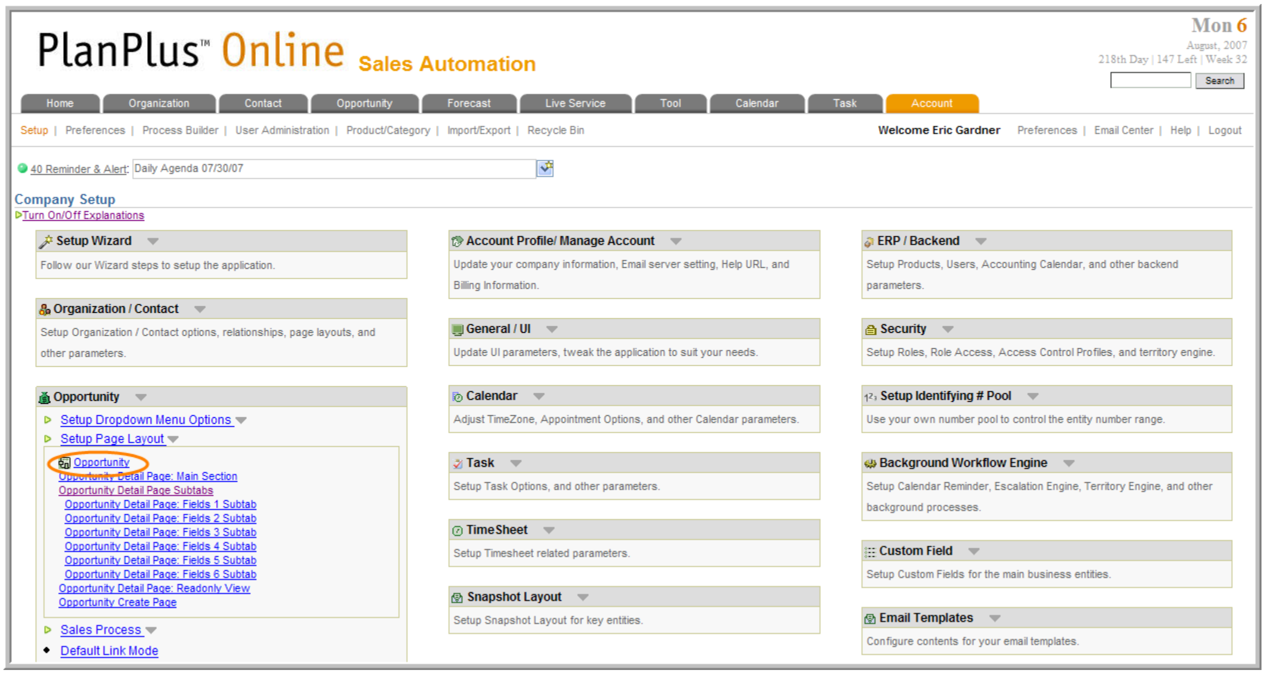
## Choosing Page Layout – Opportunities

Opportunity Custom fields are located in the Opportunity section of the “Account” Page

1. Click “Account”
2. On the bottom left side of the screen, click “Opportunity”
3. Select “Setup Page Layout”



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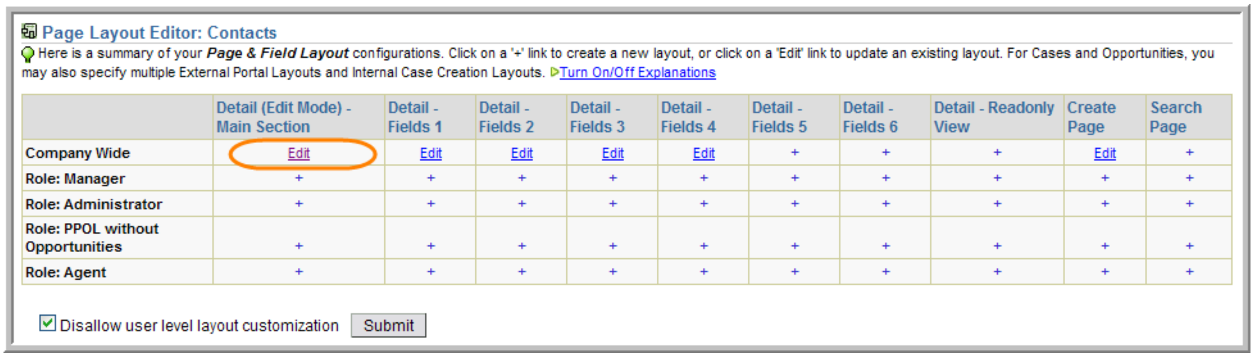
## Page Layout

Click “Edit” under the Column marked “Detail (Edit Mode) Main Section” to add fields to the main section of the Contact record. Adding the field in the “Company Wide” row will display the field to all users of the Applications.

(Refer to Sys Admin 2 Training for adding fields based upon Roles.)

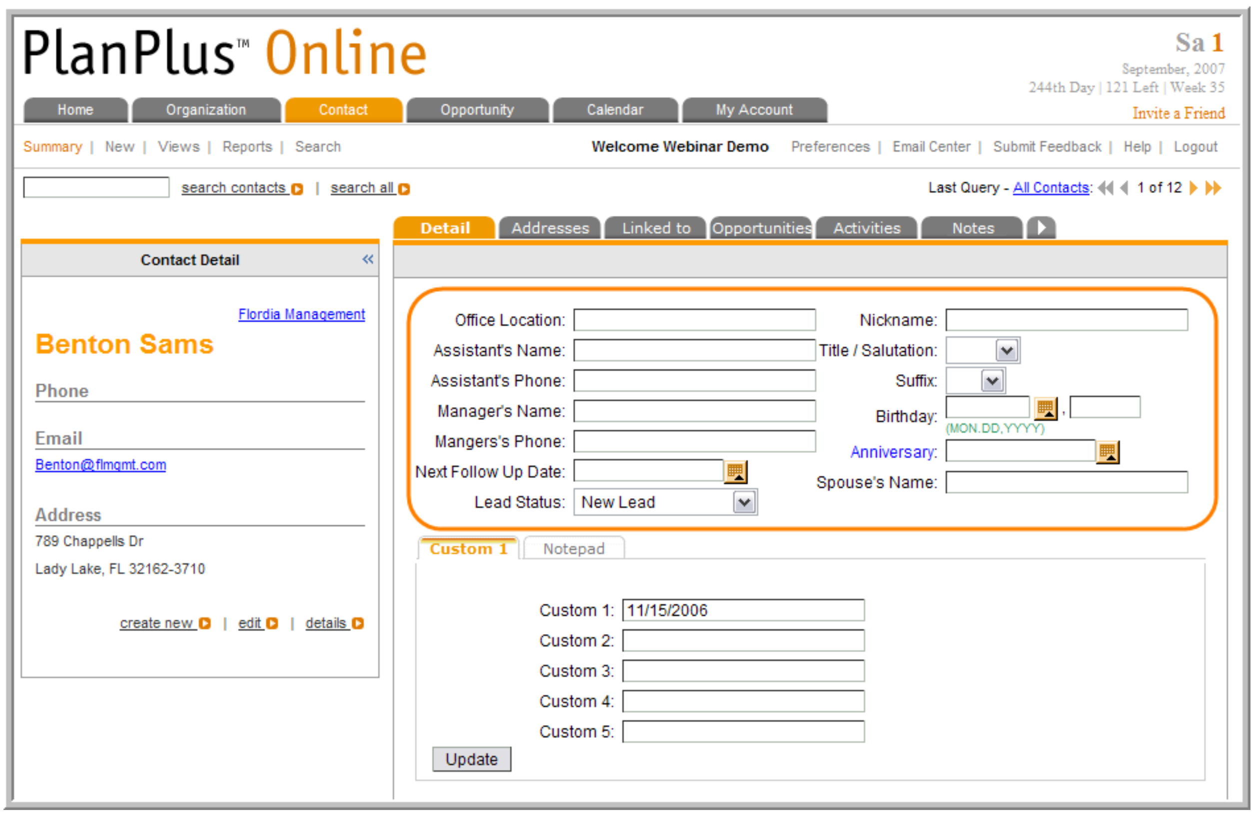


Page Layout Editor: Contacts

Here is a summary of your ***Page & Field Layout*** configurations. Click on a '+' link to create a new layout, or click on a 'Edit' link to update an existing layout. For Cases and Opportunities, you may also specify multiple External Portal Layouts and Internal Case Creation Layouts. Turn On/Off Explanations

| | Detail (Edit Mode) - Main Section | Detail - Fields 1 | Detail - Fields 2 | Detail - Fields 3 | Detail - Fields 4 | Detail - Fields 5 | Detail - Fields 6 | Detail - Readonly View | Create Page | Search Page |
|---|---|---|---|---|---|---|---|---|---|---|
| Company Wide | Edit | Edit | Edit | Edit | Edit | + | + | + | Edit | + |
| Role: Manager | + | + | + | + | + | + | + | + | + | + |
| Role: Administrator | + | + | + | + | + | + | + | + | + | + |
| Role: PPOL without Opportunities | + | + | + | + | + | + | + | + | + | + |
| Role: Agent | + | + | + | + | + | + | + | + | + | + |

Disallow user level layout customization  Submit




(PlanPlus Online displayed in a 2 column mode. )

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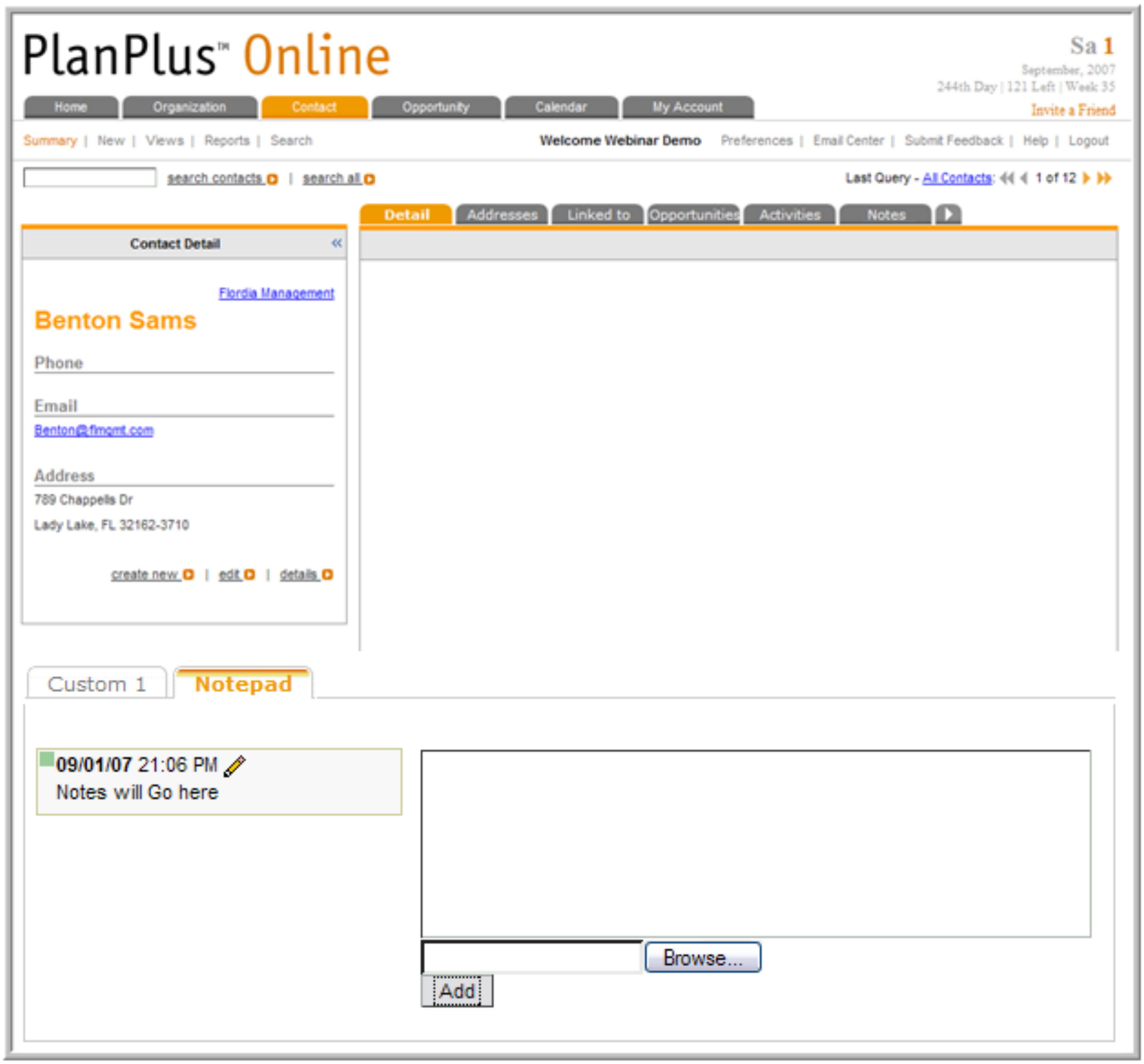
## Page Layout – Start With A Plan

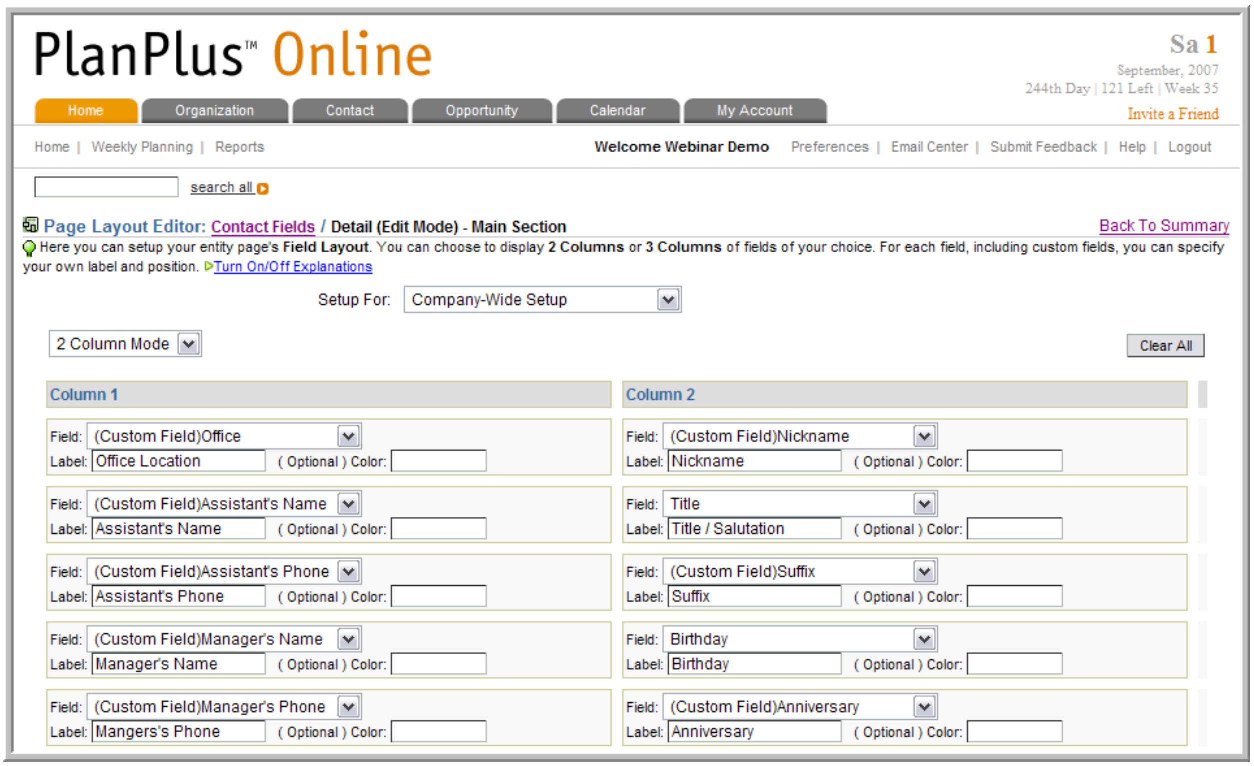
Start with a plan, use this page to write all the custom fields the database should have displayed when a Contact Record is chosen. Refer to your workbook for more pages. Create some field groups also; we will talk about these in Admin Training

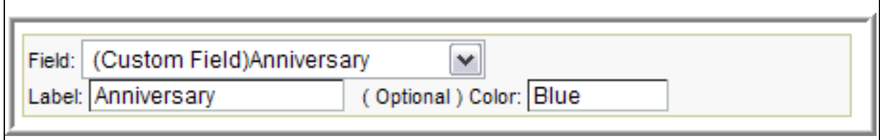


## Adding Custom fields from the Page Layout Editor

PlanPlus Online looks best in a 2 column mode. In 3 columns mode there is a horizontal scroll at the bottom of the web browser.

1. Select where you would like the Field to display on the screen.
2. Using the “Field” dropdown select the custom or indexed field you would like to add.
3. Label the field. The label is the Name as it will display on the Page Layout
4. Type a Hex Key or Name of a Color to make the Label stand out.





**Field:** Select Field created in the Custom Fields Section.

**Label:** Name as it will display on the Page Layout

**Color:** Type a Hex Key or Name of Color for the Label.

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## Editing Page Layouts

Click “Submit” after making all necessary changes to the Page Layout. Use another browser window to ensure the page layout looks as wished.

⚠ If you run out of lines for custom fields it’s ok additional lines for field entries will be displayed under the most recent submission.