

Custom Fields and Page Layouts

PlanPlus™ Online

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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[Home](#) [Organization](#) [Contact](#) [Opportunity](#) [Calendar](#) [My Account](#)

Company Setup

In Account->Setup pages you can configure the parameters that will apply to your whole company. If an individual user does not configure their personal profile, they will be using the parameters you set in these pages. [Turn On/Off Explanations](#)

Setup Wizard Follow our Wizard steps to setup the application.	Account Profile/ Manage Account Update your company information, Email server setting, Help URL, and Billing Information.	ERP / Backend Setup Products, Users, Accounting Calendar, and other backend parameters.
Organization / Contact Setup Organization / Contact options, relationships, page layouts, and other parameters.	General / UI Update UI parameters, tweak the application to suit your needs.	Security Setup Roles, Role Access, Access Control Profiles, and territory engine.
Opportunity Setup Opportunity options, Sales Process, page layouts, and other parameters.	Calendar Adjust TimeZone, Appointment Options, and other Calendar parameters.	Setup Identifying # Pool Use your own number pool to control the entity number range.
Web Service APIs Setup Web Service APIs.	Task Setup Task Options, and other parameters.	Background Workflow Engine Setup Calendar Reminder, Escalation Engine, Territory Engine, and other background processes.
Content Upload Company News, Announcements, Patches, Reports, for internal and external display.	TimeSheet Setup Timesheet related parameters.	Custom Field Organization Contact Opportunity Case Lead Calendar Task Product Product Category Bug Asset Notes User Address Knowledge Project
Offline You can use our Offline tool to access and work on your CRM data when you are not connected to the internet.	Snapshot Layout Setup Snapshot Layout for key entities.	

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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.

*Name	Description	Display Order	Type	List Of Values	Inactive
Last Email Result		74	Character String / Option	Edit	<input type="checkbox"/>
Converted		75	Character String / Option	Edit	<input type="checkbox"/>
		76	Character String		<input type="checkbox"/>
		77	Character String		<input type="checkbox"/>
		78	Character String		<input type="checkbox"/>
		79	Character String		<input type="checkbox"/>
		80	Character String		<input type="checkbox"/>

Fig 2.2

Custom Fields Types

Use this matrix to understand the various field options.

<div><div>Character String</div><div>Color Code</div><div>Date</div><div>Entity - Contact</div><div>Entity - Organization</div><div>Entity - User</div><div>File / Link</div><div>Hour - Minute</div><div>Long Text</div><div>Multiple String Values</div><div>Number</div><div>Yes/No Checkbox</div><div>Number/Calculated</div><div>Time/Calculated</div><div>String/Calculated</div><div>Value / Period</div></div>	<p>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.</p> <p>Color Code:</p> <p>Date: Enforces the stored data to be an actual date, entered in dd/mm/yyyy format.</p> <p>Entity- Contact: Shows an Icon that Links to a Contact Record</p> <p>Entity- Organization: Shows an Icon that links to a Organization Record</p> <p>Entity- User: Shows and Icon that links to a database User</p> <p>File / Link: provides a link to view WebPages or Files. File size limit is 5MB.</p> <p>Hour – Minute:</p> <p>Long Text: Stores large amounts of text.</p> <p>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.</p> <p>Number: Enforces the stored data to be a number. Number fields can be Calculated.</p> <p>Yes/ No Checkbox: Displays a checkbox interface. Places either 'yes' or 'no' in database field.</p> <p>Number/ Calculated: Calculates number fields together.</p> <p>Time Calculated: Calculates a series of time clocks and number string fields together.</p> <p>String / Calculated: Calculates string fields together.</p> <p>Value / Period: Detail Applet for totaling Opportunity Values by Month, Quarter and Year.</p>
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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

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Home Organization Contact Opportunity Calendar My Account

Setup | Preferences | User Administration | Import/Export | Recycle Bin | Welcome Webinar Demo | Preferences | Email Center | Submit Feedback | Help | Logout

Company Setup

In Account->Setup pages you can configure the parameters that will apply to your whole company. If an individual user does not configure their personal profile, they will be using the parameters you set in these pages. [Turn On/Off Explanations](#)

Setup Wizard
Follow our Wizard steps to setup the application.

Organization / Contact
Setup Dropdown Menu Options
Organization Category
Contact Classification
Business Line
Address Type
Phone Type
Country List
Person Title
Setup Contact Relationship
Setup Page Layout

Account Profile/ Manage Account
Update your company information, Email server setting, Help URL, and Billing Information.

ERP / Backend
Setup Products, Users, Accounting Calendar, and other backend parameters.

General / UI
Update UI parameters, tweak the application to suit your needs.

Security
Setup Roles, Role Access, Access Control Profiles, and territory engine.

Calendar
Adjust TimeZone, Appointment Options, and other Calendar parameters.

Setup Identifying # Pool
Use your own number pool to control the entity number range.

In the tutorial we will select “Contact Classification.”

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

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Home Organization Contact Opportunity Calendar My Account

Setup | Preferences | User Administration | Import/Export | Recycle Bin | Welcome Webinar Demo | Preferences | Email Center | Submit Feedback | Help | Logout

search all

Setup Option Values
You are viewing/updating the possible selection of values for Contact Category.

*Key	*Display Name	Description	Inactive
CLIENT	Client		<input type="checkbox"/>
Customer	Customer		<input type="checkbox"/>



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

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****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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Home Organization Contact Opportunity Calendar My Account

Setup | Preferences | User Administration | Import/Export | Recycle Bin | Welcome Webinar Demo | Preferences | Email Center | Submit Feedback | Help | Logout

search all

Company Setup


In Account->Setup pages you can configure the parameters that will apply to your whole company. If an individual user does not configure their personal profile, they will be using the parameters you set in these pages. [Turn On/Off Explanations](#)

- Setup Wizard
Follow our Wizard steps to setup the application.
- Organization / Contact
 - Setup Dropdown Menu Options
 - Setup Contact Relationship
 - Setup Page Layout
 - Freeze Organization # After Creation
 - Freeze Contact # After Creation
 - Default Link Mode
 - Render Snapshot In Readonly Page
 - Show Organization's Address in Contact
 - Show Contact's Calenda/Task/Notes in Organization
 - Skip Organization/Contact records without access in Search Result
 - Enable/Disable Contact Portrait
 - Organization Snapshot Layout
 - Contact Snapshot Layout
 - Phone: Show Skype
- Account Profile/ Manage Account
Update your company information, Email server setting, Help URL, and Billing Information.
- ERP / Backend
Setup Products, Users, Accounting Calendar, and other backend parameters.
- General / UI
Update UI parameters, tweak the application to suit your needs.
- Calendar
Adjust TimeZone, Appointment Options, and other Calendar parameters.
- Task
Setup Task Options, and other parameters.
- TimeSheet
Setup Timesheet related parameters.
- Security
Setup Roles, Role Access, Access Control Profiles, and territory engine.
- Setup Identifying # Pool
Use your own number pool to control the entity number range.
- Background Workflow Engine
Setup Calendar Reminder, Escalation Engine, Territory Engine, and other background processes.
- Custom Field
Setup Custom Fields for the main business entities.

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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.

	<p>Setup Dropdown Menu Options: Changes required fields such as Organization Category and Contact Classification</p> <p>Setup Contact Relationship: How contacts are related to one another; i.e. Contact to Organization or Contact to Contact.</p> <p>Setup Page Layout: Displays Custom fields to Organization and Contact Records.</p> <p>Organization: Changes Organization Detail Display</p> <p>Contact: Changes Contact Detail Display</p>
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(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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Home Organization Contact Opportunity Forecast Live Service Tool Calendar Task Account

Setup | Preferences | Process Builder | User Administration | Product/Category | Import/Export | Recycle Bin

Welcome Eric Gardner Preferences | Email Center | Help | Logout

40 Reminder & Alert: Daily Agenda 07/30/07

Company Setup

Turn On/Off Explanations

Setup Wizard

Follow our Wizard steps to setup the application.

Organization / Contact

Setup Organization / Contact options, relationships, page layouts, and other parameters.

Opportunity

Setup Dropdown Menu Options

Setup Page Layout

Opportunity

Opportunity Detail Page: Main Section

Opportunity Detail Page: Subtabs

Opportunity Detail Page: Fields 1 Subtab

Opportunity Detail Page: Fields 2 Subtab

Opportunity Detail Page: Fields 3 Subtab

Opportunity Detail Page: Fields 4 Subtab

Opportunity Detail Page: Fields 5 Subtab

Opportunity Detail Page: Fields 6 Subtab

Opportunity Detail Page: Readonly View

Opportunity Create Page

Sales Process

Default Link Mode

Account Profile/ Manage Account

Update your company information, Email server setting, Help URL, and Billing Information.

General / UI

Update UI parameters, tweak the application to suit your needs.

Calendar

Adjust TimeZone, Appointment Options, and other Calendar parameters.

Task

Setup Task Options, and other parameters.

TimeSheet

Setup Timesheet related parameters.

Snapshot Layout

Setup Snapshot Layout for key entities.

ERP / Backend

Setup Products, Users, Accounting Calendar, and other backend parameters.

Security

Setup Roles, Role Access, Access Control Profiles, and territory engine.

Setup Identifying # Pool

Use your own number pool to control the entity number range.

Background Workflow Engine

Setup Calendar Reminder, Escalation Engine, Territory Engine, and other background processes.

Custom Field

Setup Custom Fields for the main business entities.

Email Templates

Configure contents for your email templates.

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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

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Home Organization **Contact** Opportunity Calendar My Account [Invite a Friend](#)

Summary | New | Views | Reports | Search Welcome Webinar Demo | Preferences | Email Center | Submit Feedback | Help | Logout

search contacts | search all

Last Query - [All Contacts](#): << 1 of 12 >>

Contact Detail <<

[Florida Management](#)

Benton Sams

Phone

Email

Benton@fimgmt.com

Address

789 Chappells Dr
Lady Lake, FL 32162-3710

[create new](#) | [edit](#) | [details](#)

Detail | Addresses | Linked to | Opportunities | Activities | Notes

Office Location:

Nickname:

Assistant's Name:

Title / Salutation:

Assistant's Phone:

Suffix:

Manager's Name:

Birthday:

Mangers's Phone:

Anniversary:

Next Follow Up Date:

Spouse's Name:

Lead Status:

Custom 1 | Notepad

Custom 1:

Custom 2:

Custom 3:

Custom 4:

Custom 5:

(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

The screenshot displays the PlanPlus Online web application interface. At the top, the logo "PlanPlus™ Online" is on the left, and the date "Sa 1 September, 2007" with "244th Day | 121 Left | Week 35" is on the right. A navigation bar includes links for Home, Organization, Contact (highlighted), Opportunity, Calendar, and My Account. Below this is a secondary navigation bar with links like Summary, New, Views, Reports, Search, and a "Welcome Webinar Demo" message. A search bar is present with "search contacts" and "search all" buttons. The main content area is divided into two panes. The left pane, titled "Contact Detail", shows information for "Benton Sams" with fields for Phone, Email (Benton@fmcmt.com), and Address (789 Chappells Dr, Lady Lake, FL 32162-3710). The right pane has tabs for Detail, Addresses, Linked to, Opportunities, Activities, and Notes. At the bottom, there is a "Custom 1" tab and a "Notepad" section. The Notepad section includes a timestamp "09/01/07 21:06 PM" and a placeholder "Notes will Go here". Below the Notepad is a large text input area with an "Add" button and a "Browse..." button.

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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.

	<p>Field: Select Field created in the Custom Fields Section.</p> <p>Label: Name as it will display on the Page Layout</p> <p>Color: Type a Hex Key or Name of Color for the Label.</p>

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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.

Field: (Custom Field)Follow Up Date Label: Next Follow Up Date (Optional) Color: <input type="text"/>	Field: (Custom Field)Spouse's Name Label: Spouse's Name (Optional) Color: <input type="text"/>
Field: (Custom Field)Lead Status Label: Lead Status (Optional) Color: <input type="text"/>	Field: <input type="text"/> Label: <input type="text"/> (Optional) Color: <input type="text"/>
Field: <input type="text"/> Label: <input type="text"/> (Optional) Color: <input type="text"/>	Field: <input type="text"/> Label: <input type="text"/> (Optional) Color: <input type="text"/>
Field: <input type="text"/> Label: <input type="text"/> (Optional) Color: <input type="text"/>	Field: <input type="text"/> Label: <input type="text"/> (Optional) Color: <input type="text"/>
Field: <input type="text"/> Label: <input type="text"/> (Optional) Color: <input type="text"/>	Field: <input type="text"/> Label: <input type="text"/> (Optional) Color: <input type="text"/>

☒ Disallow user level customization
☐ Delete
Submit

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Home Organization **Contact** Opportunity Calendar My Account

Summary | New | Views | Reports | Search

Welcome Webinar Demo | Preferences | Email Center | Submit Feedback | Help | Logout

search contacts | search all

Last Query - All Contacts: << < 1 of 12 >> >>

Contact Detail << [Florida Management](#)

Benton Sams

Phone

Email
Benton@fmqmt.com

Address
789 Chappells Dr
Lady Lake, FL 32162-3710
[create new](#) | [edit](#) | [details](#)

Office Location: Assistant's Name: Assistant's Phone: Manager's Name: Mangers's Phone: Next Follow Up Date: Lead Status: New Lead

Nickname: Title / Salutation: Suffix: Birthday: Anniversary: Spouse's Name:

Custom 1 Notepad

Custom 1: 11/15/2006
Custom 2:
Custom 3:
Custom 4:
Custom 5:
Update