CRM - Editing Fields

CRM - Modules and Topics

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Overview

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.

Use Case(s)

Sometimes you may need to adjust the values stored within a picklist field, such as if you add a new lead source.

Video

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Editing an Existing Field

Your **CRM** should already include many different fields, containing a variety of different types of data. However, often you may need to edit the list of values available to choose from in a **Picklist field**, or rename an existing field by changing its **label**.

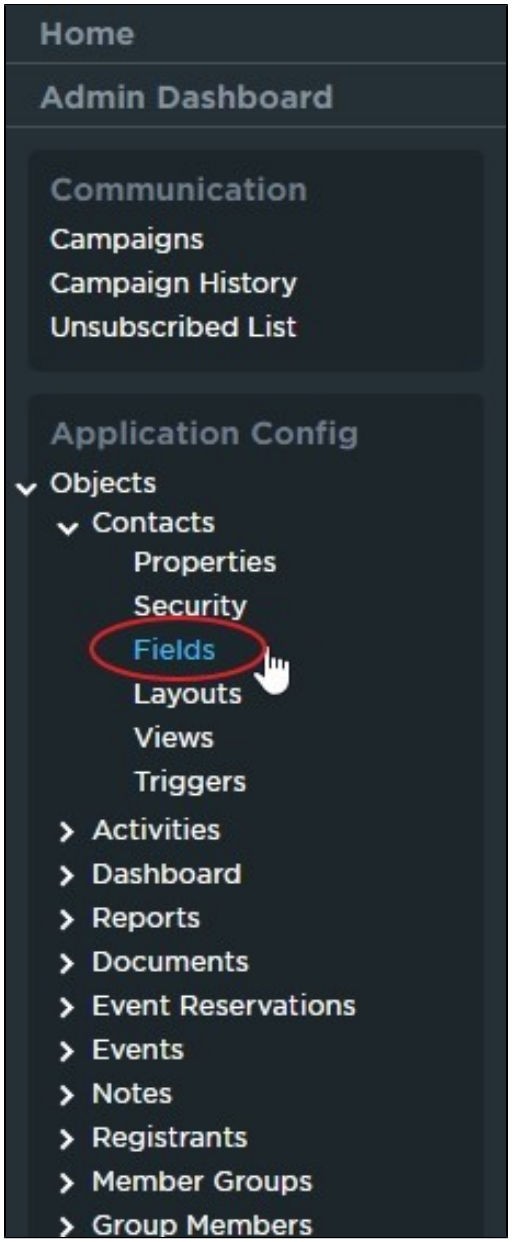
Adding a new Field

To begin, you'll need to first decide what **Object** your field exists in - that is, what is it that this field helps to describe? The most commonly used **Object** in **CRM** is the **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**.

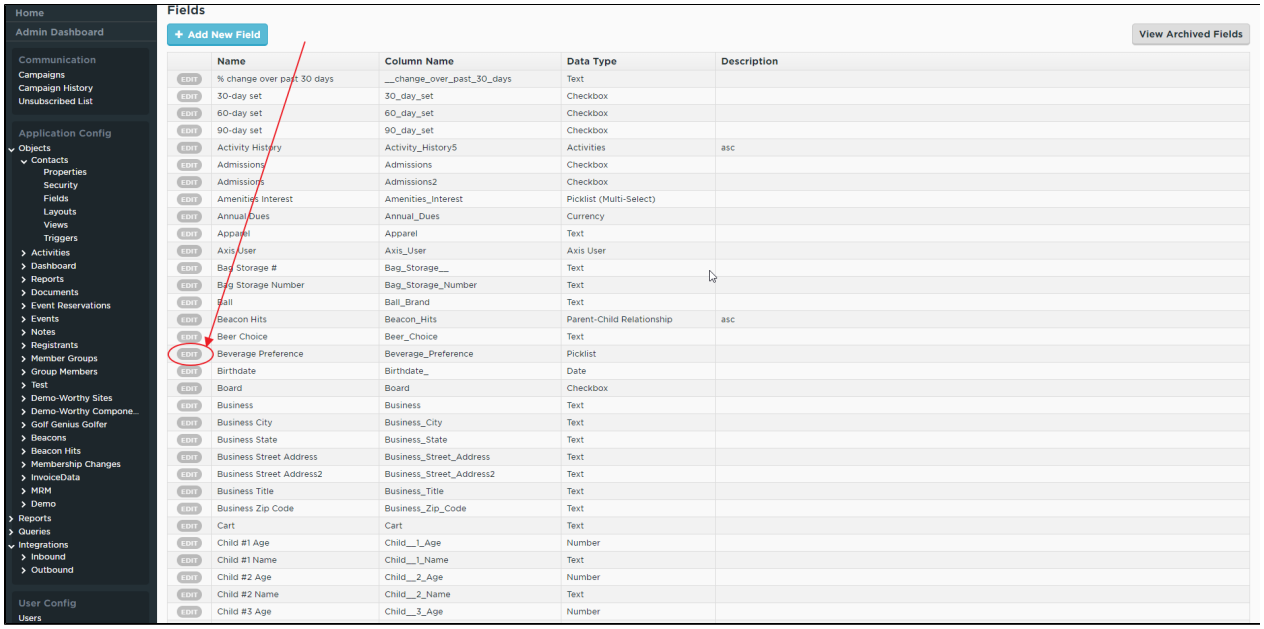
In this example, the field we are adjusting is "Beverage Preference", which will allow us to choose which beverage this Member prefers when they dine. This field would most accurately describe a **Contact**, so we will find this new field in the Contacts Object.

To **edit the 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.

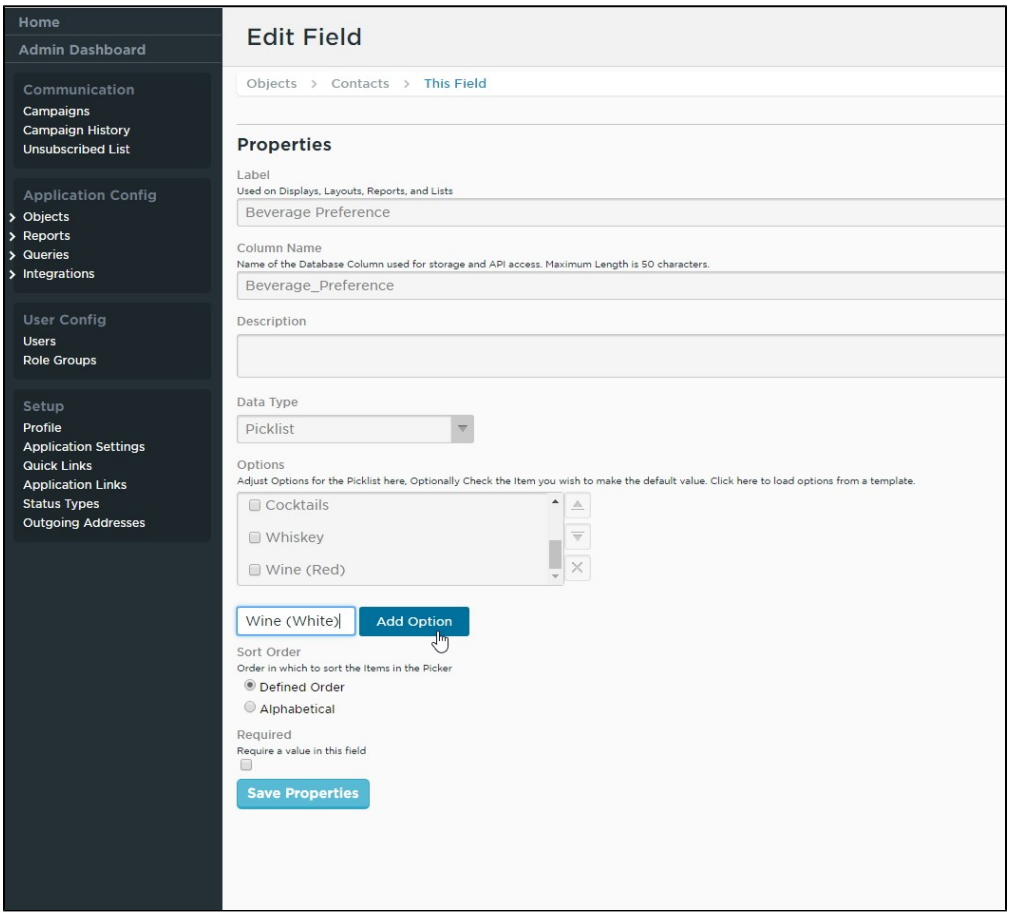
To edit your field from here, you'll first need to open your **Contacts Object** for editing. From the left-hand sidebar, **click** on **Options** t o expand the list and display all of the Objects present in your CRM. Contacts should almost always be the first Object listed. **Click Contacts** to expand the list further, and then **click Fields** to view the list of **existing Fields** for the **Contacts Object**.



To edit your chosen field, find its name from the list of fields displayed on this screen, and **click** the **Edit** button next to it.



From here, you should see the list of **Field Properties** for this field. At the top of the list is the field's label, or how it will display when shown in a **View** or a **Layout**. Since the field that we selected (Beverage Preference) is a **Picklist field**, you will also see a list of available options, as well as a field to enter in new options.



To add new options to the list, **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 all 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 updated.

Downloadable Guide

CRM Editing Fields Guide