

# CRM - Editing Fields

CRM - Modules and Topics

- 1 Overview
- 2 Video
- 3 Downloadable Guide

# 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

# Content

- [Editing an Existing Field](#)
  - [Adding a new Field](#)

## 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**.

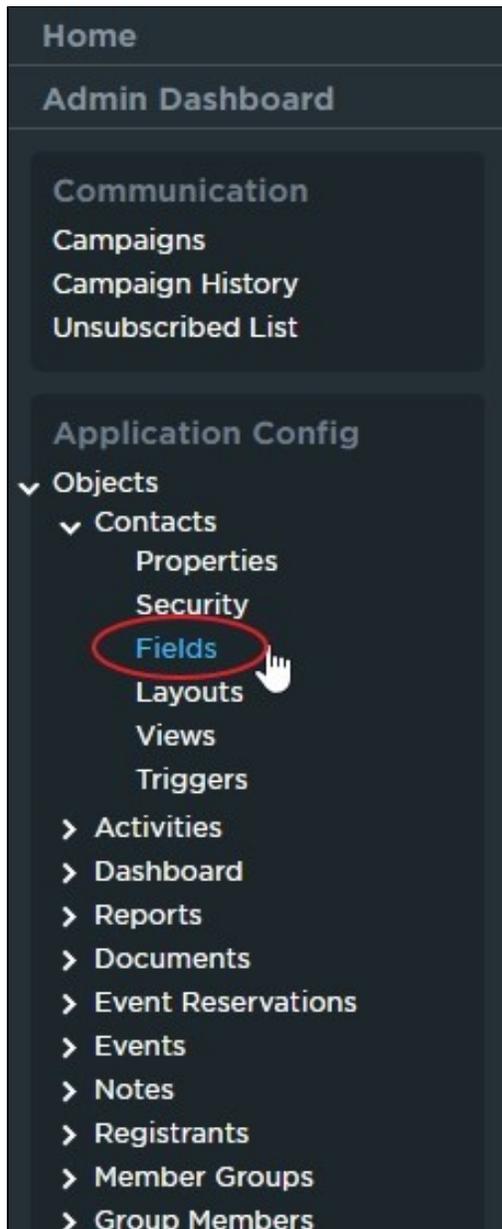
## Adding a new Field

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** to 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.

Name	Column Name	Data Type	Description
<input type="checkbox"/> % change over past 30 days	__change_over_past_30_days	Text	
<input type="checkbox"/> 30-day set	30_day_set	Checkbox	
<input type="checkbox"/> 60-day set	60_day_set	Checkbox	
<input type="checkbox"/> 90-day set	90_day_set	Checkbox	
<input type="checkbox"/> Activity History	Activity_History5	Activities	asc
<input type="checkbox"/> Admissions	Admissions	Checkbox	
<input type="checkbox"/> Admissions	Admissions2	Checkbox	
<input type="checkbox"/> Amenities Interest	Amenities_Interest	Picklist (Multi-Select)	
<input type="checkbox"/> Annual Dues	Annual_Dues	Currency	
<input type="checkbox"/> Apparel	Apparel	Text	
<input type="checkbox"/> Axis User	Axis_User	Axis User	
<input type="checkbox"/> Bag Storage #	Bag_Storage_#	Text	
<input type="checkbox"/> Bag Storage Number	Bag_Storage_Number	Text	
<input type="checkbox"/> Ball	Ball_Brand	Text	
<input type="checkbox"/> Beacon Hits	Beacon_Hits	Parent-Child Relationship	asc
<input type="checkbox"/> Beer Choice	Beer_Choice	Text	
<input type="checkbox"/> Beverage Preference	Beverage_Preference	Picklist	
<input type="checkbox"/> Birthdate	Birthdate_#	Date	
<input type="checkbox"/> Board	Board	Checkbox	
<input type="checkbox"/> Business	Business	Text	
<input type="checkbox"/> Business City	Business_City	Text	
<input type="checkbox"/> Business State	Business_State	Text	
<input type="checkbox"/> Business Street Address	Business_Street_Address	Text	
<input type="checkbox"/> Business Street Address2	Business_Street_Address2	Text	
<input type="checkbox"/> Business Title	Business_Title	Text	
<input type="checkbox"/> Business Zip Code	Business_Zip_Code	Text	
<input type="checkbox"/> Cart	Cart	Text	
<input type="checkbox"/> Child #1 Age	Child_1_Age	Number	
<input type="checkbox"/> Child #1 Name	Child_1_Name	Text	
<input type="checkbox"/> Child #2 Age	Child_2_Age	Number	
<input type="checkbox"/> Child #2 Name	Child_2_Name	Text	
<input type="checkbox"/> Child #3 Age	Child_3_Age	Number	

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.

Home

Admin Dashboard

Communication

Campaigns

Campaign History

Unsubscribed List

Application Config

Objects

Reports

Queries

Integrations

User Config

Users

Role Groups

Setup

Profile

Application Settings

Quick Links

Application Links

Status Types

Outgoing Addresses

## Edit Field

Objects > Contacts > This Field

### Properties

**Label**  
Used on Displays, Layouts, Reports, and Lists

Beverage Preference

**Column Name**  
Name of the Database Column used for storage and API access. Maximum Length is 50 characters.

Beverage\_Preference

**Description**

**Data Type**

Picklist

**Options**  
Adjust Options for the Picklist here. Optionally Check the Item you wish to make the default value. Click here to load options from a template.

Cocktails

Whiskey

Wine (Red)

Wine (White) Add Option

**Sort Order**  
Order in which to sort the Items in the Picker

Defined Order

Alphabetical

**Required**  
Require a value in this field

Save Properties

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](#)