

User Defined Data

User defined fields (UDFs) are used to record customised information in Forté CRM. UDFs allow you to add details to the system that are not included as standard but are important to your business. A hairdresser may record the natural hair colour of a client, a computer consultant may record what network operating system is used by an account, or a financial adviser may record the primary objective of a portfolio.

Creating a User Defined Field

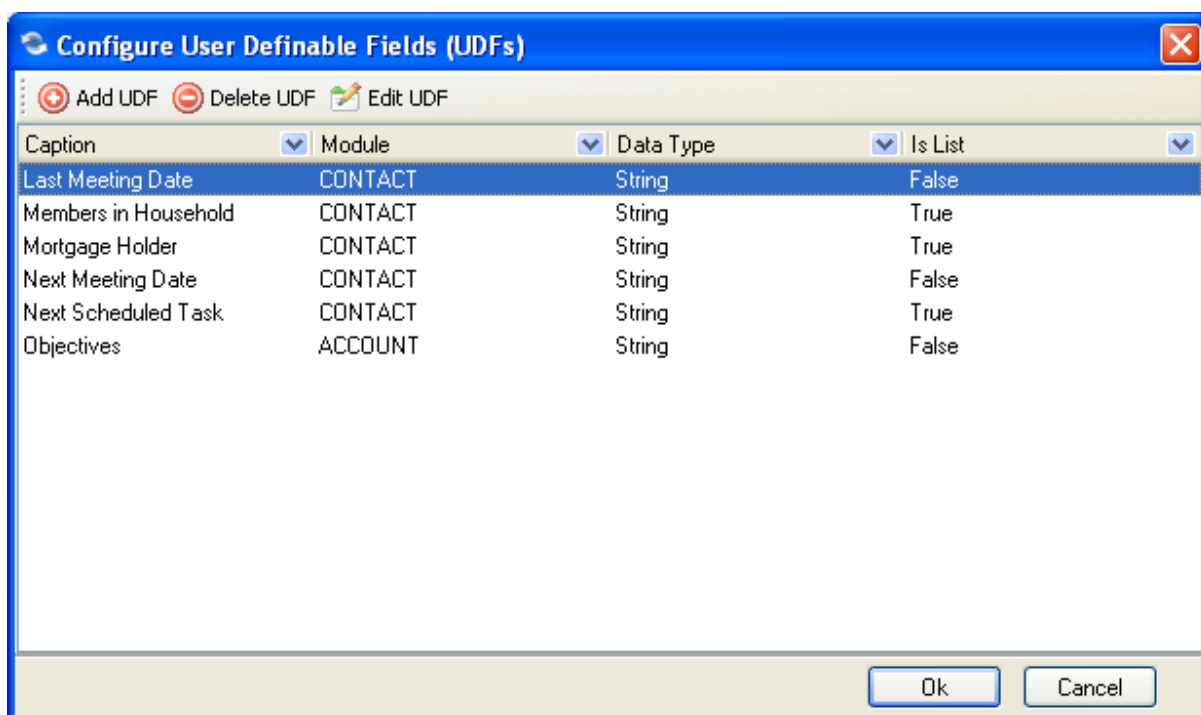
In this tutorial, we will add a user defined field to record hair colour for each contact.

Step 1: Access the User Defined Fields Configuration screen

In the main window, click on Administration and select Administer UDFs.



The Configure User Defined Fields screen will be displayed.



Step 2: Enter details for the new User Defined Field

Click the Add UDF button on the configuration screen. The UDF Edit screen will be displayed.

Enter the following details to set up the new User Defined Field:

UDF Caption

Enter a description for the field. We will call our new field 'Natural Hair Colour'. This description will be shown on the details screen for the contact.

Module

The module is the functional portion of the system that the UDF is applicable to. In this example the 'Natural Hair Colour' field is related to contacts, and will appear in the contact's details, so select CONTACT from the list of modules.

Type

A User Defined Field can contain numbers (Float) or text (String). UDFs can also be set up as a list. Hair colour is text, so select 'String' from the list of types.

UDF is List

Check this box to set up the hair colour field as a list of options from which users can select a colour. Wherever possible, it is a good idea to set UDFs up as lists as this makes things simpler for users and makes searching on those attributes more effective. For

example, with hair colour, one staff member may enter 'brown' while another would enter 'brunette'. Searching for one will not find the other, so limiting the choice to a list of options ensures consistency. Misspelling can also be avoided using a list.

To create the list of hair colours, for each list item, click 'Add UDF Value' and enter a description for the colour. List items can be edited using the 'Edit UDF Value' and 'Delete UDF Value' buttons.

One list item should be specified as the default. This will be the value of the UDF if no other option is chosen. Set 'Not Known' as the default hair colour.

Step 3: Create the new User Defined Field

When all details, including list options, have been entered, click Ok to create the new UDF.

Forté CRM will automatically add the Natural Hair Colour field to the New Contact wizard. When a new contact is created the user will be asked to select 'Natural Hair Colour' from the list of options. The hair colour selected will be shown on the details screen for the contact.

UDFs for accounts and contacts automatically become available as merge symbols in document templates, enabling them to be included in letters and reports.

Edit a User Defined Field

To edit a User Defined Field

To edit the setup of an existing UDF (i.e. change the caption, list values etc.):

- click on Administration at the top of the screen and select Administer UDFs.
- select the UDF and click Edit UDF, or alternatively, double click on the UDF to be edited.

Do not change the data type of a UDF.

If you change the text in existing list options for a UDF, then those changes will affect every contact or account (or other entity) with that list option selected.

To change the value of UDF data

To change the hair colour recorded for a contact:

- click on the Natural Hair Colour caption on the details tab for the contact.
- select the new hair colour from the list of options.
- click Ok to update the hair colour field.

The screenshot shows the FortéCRM interface for a user profile. The main window title is "Timothy Johnson Tim". The top menu bar includes "Edit", "Document", "Appointment", "Task", "New Email", "Note", and "Delete". Below the menu is a tabbed interface with "Details", "Activity", "General Notes", and "Accounts". The "Details" tab is active, showing the name "Mr Timothy Johnson" in a header. Below this, a list of fields is displayed: "Known As: Tim", "Initials: T J", "Status: Active", "Occupation: Software Engineer", "Gender: Male", "Date of Birth: 07/09/1967", "Mailing Name: [redacted]", "Default Postcode: [redacted] New Zealand", "Default Phone: [redacted]", and "Categories: [redacted]". A "UDF Data" section is visible at the bottom of the profile view. A modal dialog box titled "Natural Hair Colour" is open, with a text input field containing "Black" and a dropdown arrow. The dialog has "Ok" and "Cancel" buttons at the bottom. Below the dialog, the text "Natural Hair Colour: Black" is visible.