

Fields

Set up page fields

Version 8.0



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Set up page fields

PRODUCTS: ALL CREATIO PRODUCTS

Add, modify, hide or delete fields on a record page in the Page Designer. You can also manage the section data structure (i. e., the list of section columns). Creatio adds a new column to the section data structure after you add a new field to the section page and save the changes.

When selecting a column in the Page Designer's toolbar, review the list in the [*Existing column*] block first. The designer might already have the needed column ready for placement. If such a column does not exist, use the elements from the [*New column*] block.

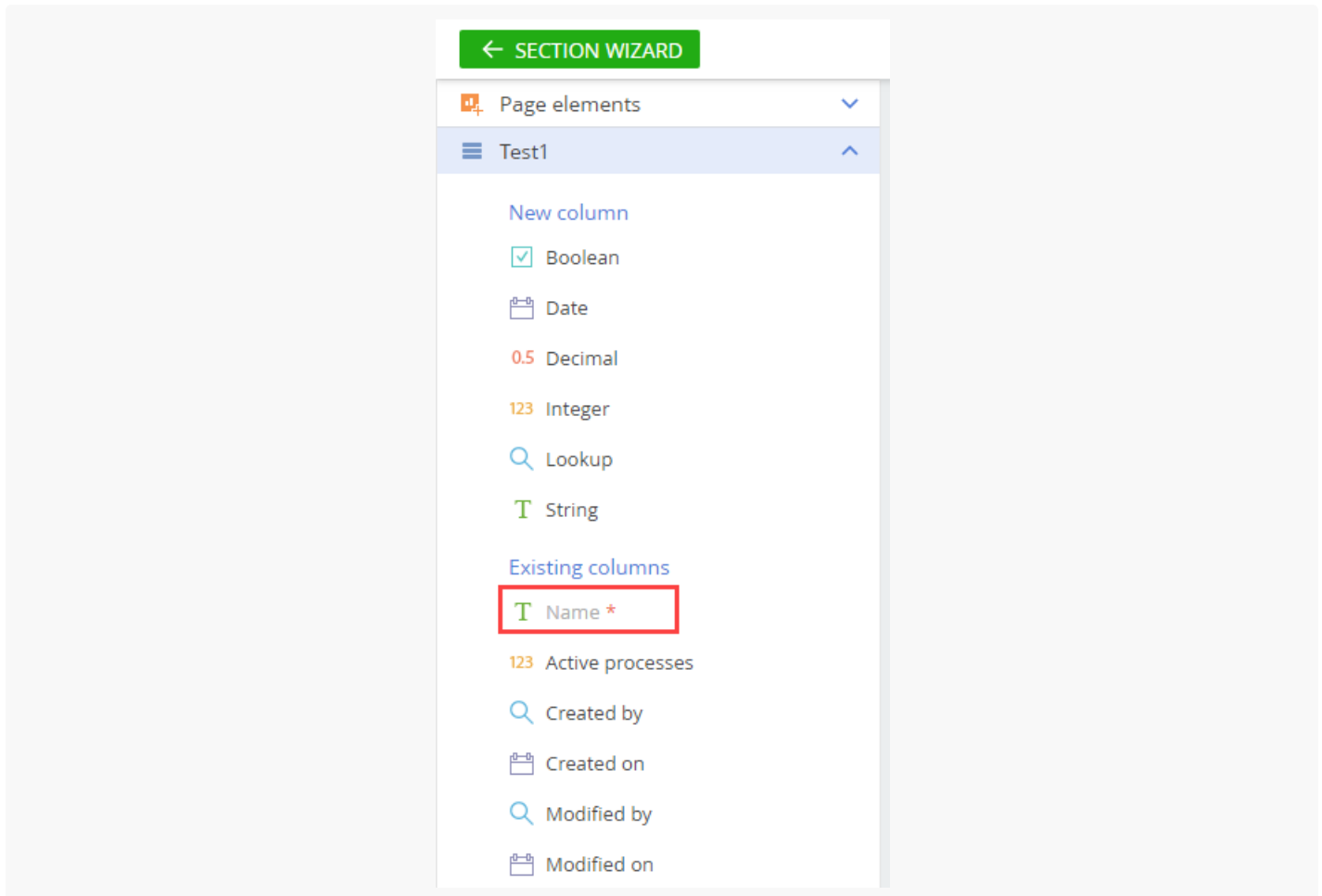
Add a field based on the existing column

The [*Existing columns*] block of the [*Page elements*] menu displays columns that are already available in the section. These columns are not always displayed on the record page, but they are used in the Creatio database and cannot be deleted.

Some of the columns can be required on the object level: you cannot create a record in the database if you do not fill them out. Required columns are marked with an asterisk (*) (Fig. 1).

Attention. Add all required columns as fields to the record page to ensure that the record page opens correctly.

Fig. 1 A required field in the Page Designer

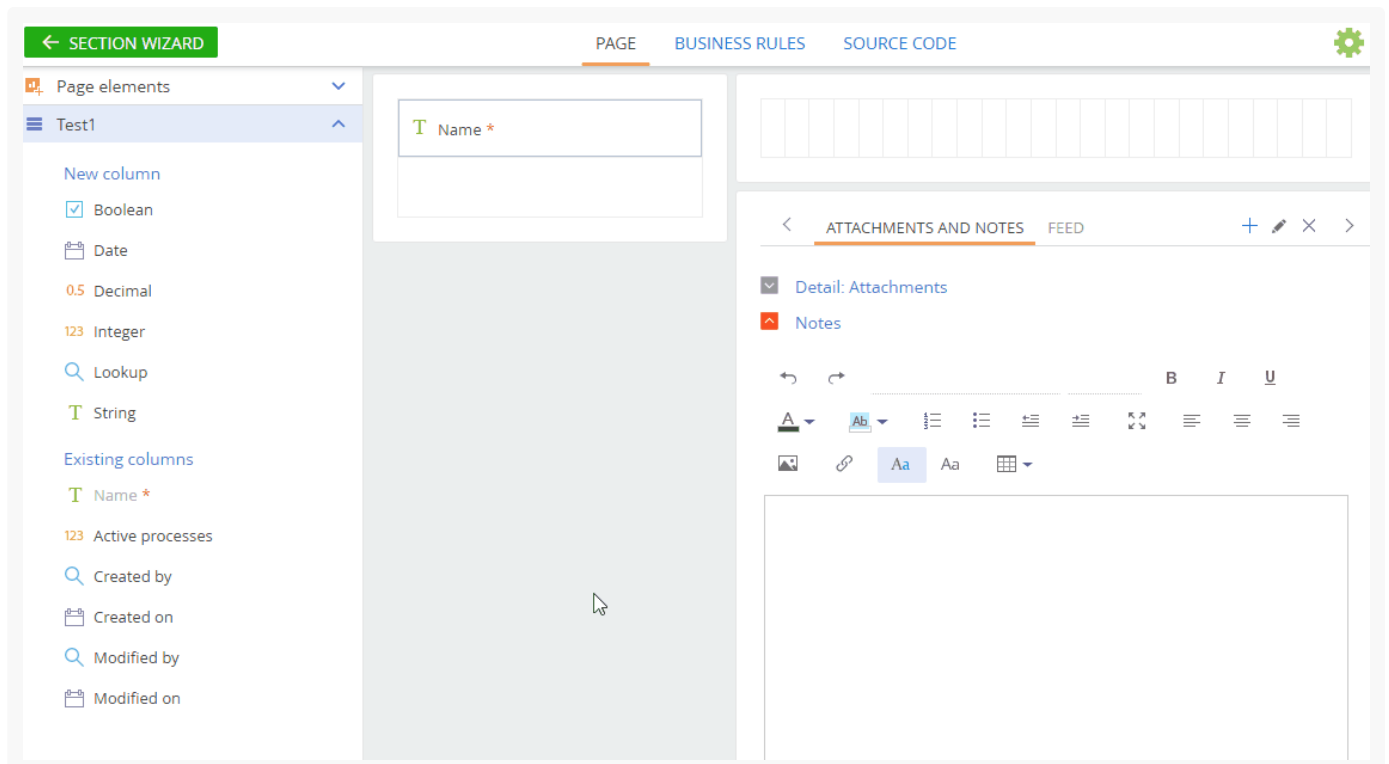


To **add existing columns** to the page:

1. Open the relevant section, e. g., [*Requests*].
2. Click [*View*] → [*Open Section Wizard*].
3. Take the following steps in the [*Section pages*] block of the Section Wizard:
 - a. Click [*Edit page*] if the section has a single page.
 - b. Click the link to the relevant page if the section has several pages.
4. Drag existing columns from the [*Existing columns*] area to the record page.

The areas where you can place the field are highlighted. The names of the columns present on the page are highlighted in gray, but you can add the columns again.

Fig. 2 Adding existing columns to a record page

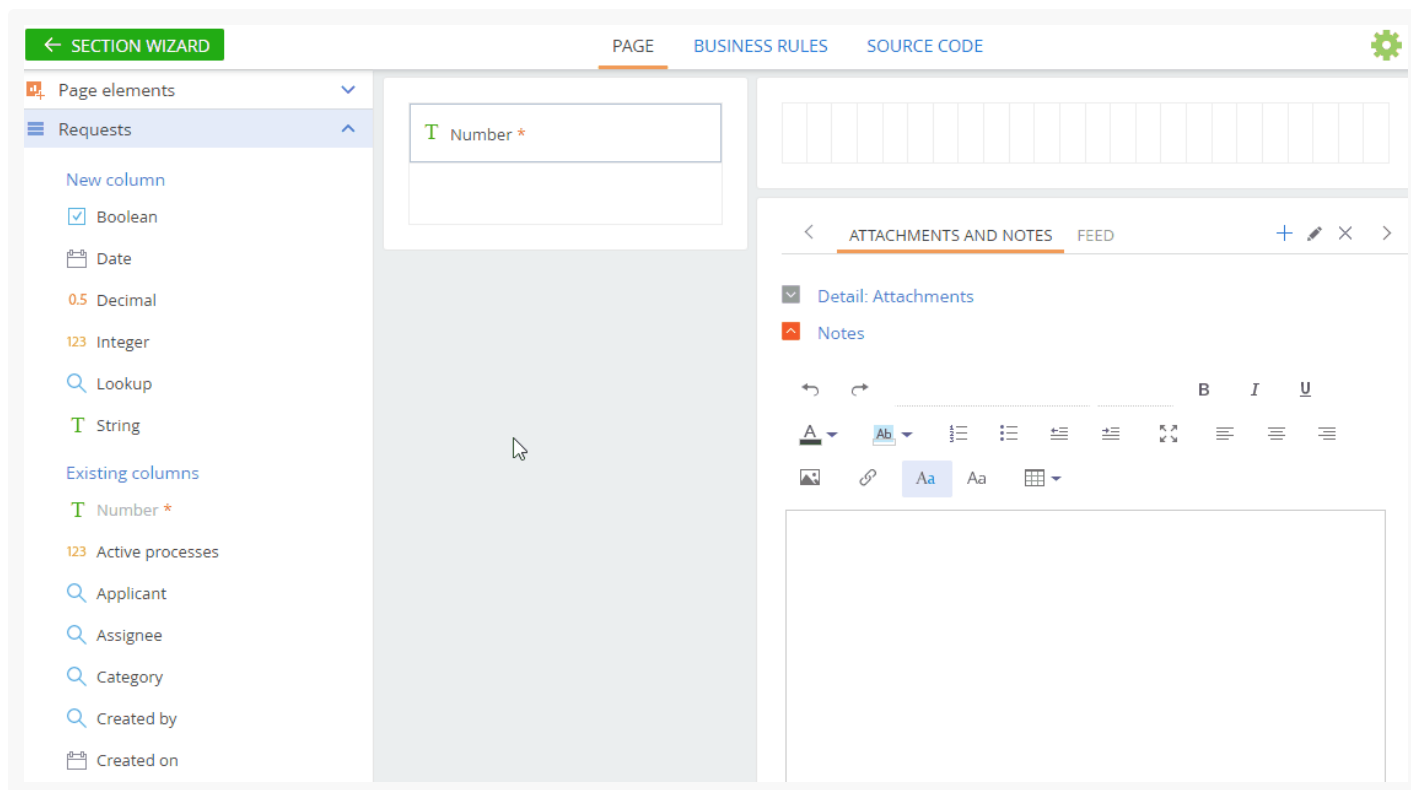


Attention. If you add a new column to a page in the Page Designer and accidentally drop it on top of another column, the new column does not appear in the Page Designer's working area.

To **change the column width**, drag the edge of a corresponding field.

You can also **change the column height** for [multiline text fields](#) (Fig. 3).

Fig. 3 Resizing a multiline field



Attention. Make sure the unique [Code] value of the new column does not coincide with the code of other configuration objects. Collision of unique object codes leads to compilation errors, as well as block the modification of schema and integration of Creatio data with external services.


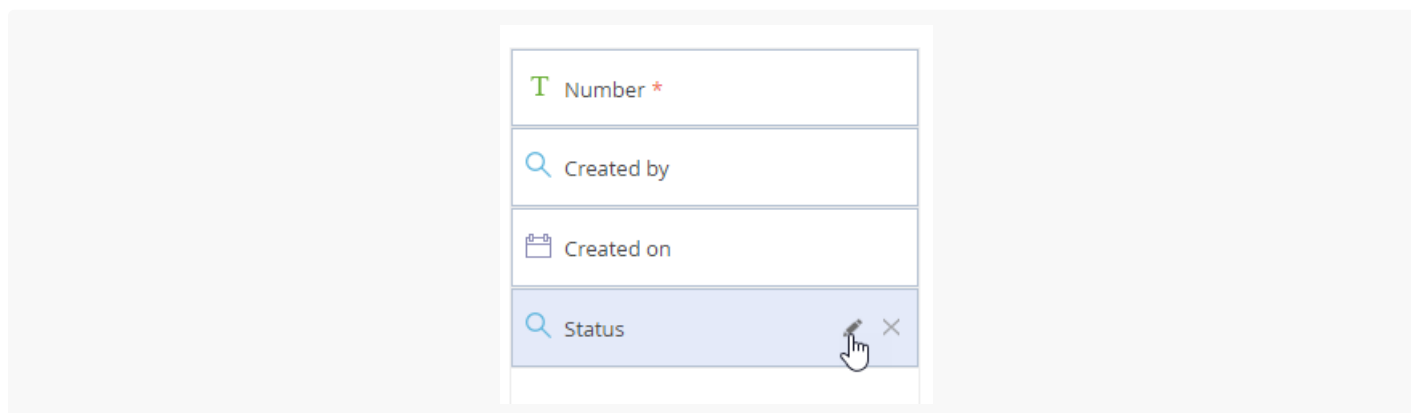
To **modify the field properties**, highlight the field and click  (Fig. 4).

Fig. 4 Edit a field in the Page Designer




To **delete a field** from the page, highlight the field and click  (Fig. 5).

Fig. 5 Deleting a field from the record page

Attention. Removing a field from the page will not delete the corresponding column from the section object. You can delete an object column through the [*Configuration*] section only. Learn more in developer documentation: [Creatio IDE](#). Besides, you can only delete the columns you created yourself and only if they have not been added to object pages. Delete the columns from the package in which you defined them. Base columns, such as “Id,” “Created by,” etc., cannot be deleted.

Add a field based on a new column

The [*New column*] block of the page elements area displays available types of columns that you can add to the page.

See the type list below:

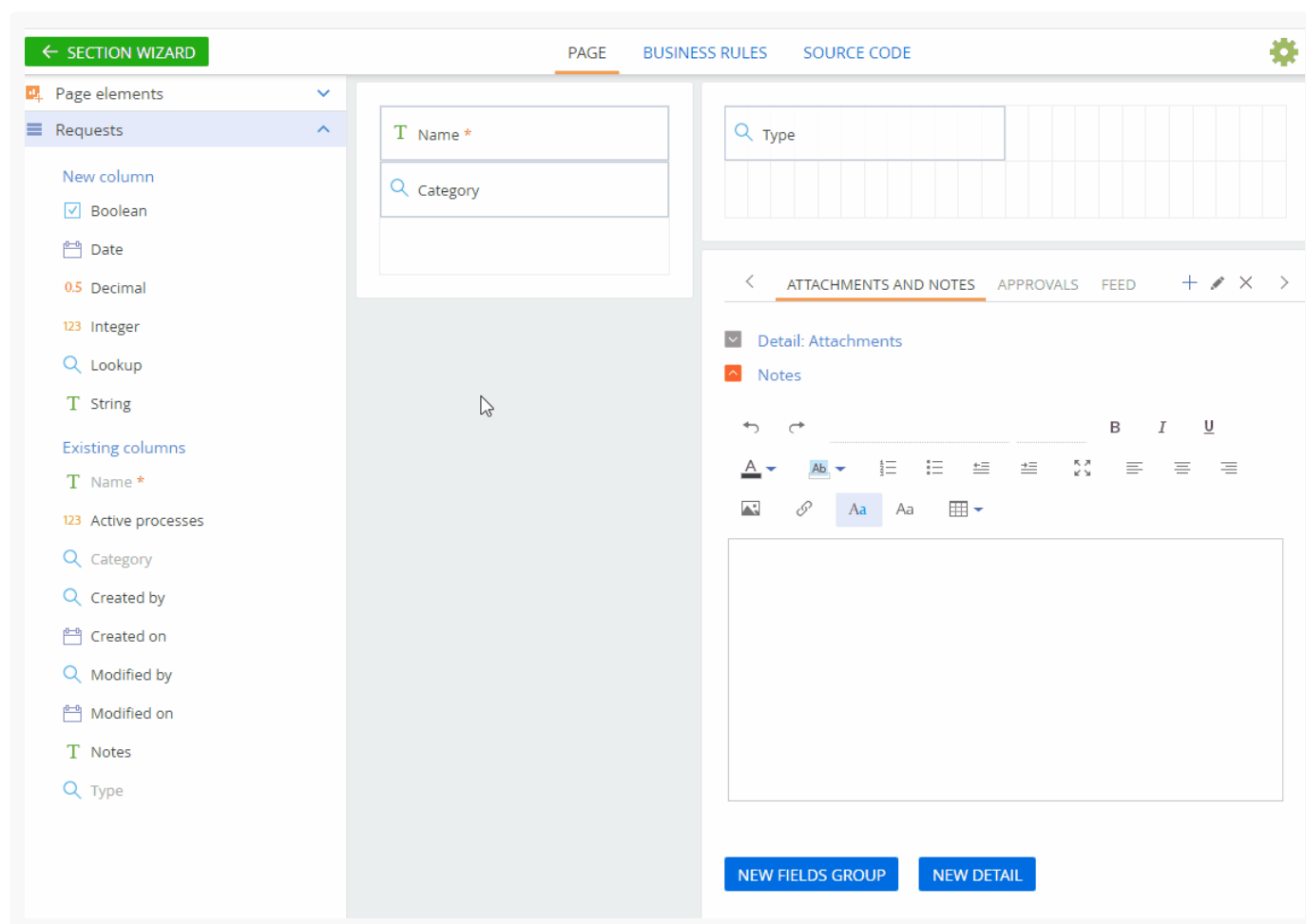
Column type	Type of field on the page	Case
String	<p>A text field. Can contain letters, numbers, and other characters. Multiline text fields support line breaks and can have a variable height. String fields have several additional parameters. Read more >>></p>	<p>Single line fields: the [<i>Full name</i>] and [<i>Full job title</i>] fields on the contact page.</p> <p>Multiline fields: the [<i>Result details</i>] field on the activity page.</p>
Integer	<p>A numeric field that can only contain integer numbers (no fractional numbers).</p> <p>If you use a field of “Integer” type on the page, the analytical data based on the values of this field will be rounded up to integers.</p>	<p>The [<i>Age</i>] field on the contact page.</p>
Decimal	<p>A numeric field that can contain fractional numbers.</p>	<p>The [<i>Payment amount</i>] field on the invoice page.</p>
Date/time	<p>“Date/Time” type fields register calendar data.</p>	<p>The [<i>Start</i>] and [<i>Due</i>] fields on the activity page.</p>
Lookup	<p>Lets you select values from a manually created or imported list. The values available for selection are stored in the corresponding lookups. Users can fill out lookup fields by selecting a value from either a drop-down list or selection box. Lookup fields have several additional parameters. Read more >>></p>	<p>Drop-down list lookup fields: the [<i>Type</i>] and [<i>Role</i>] fields on the contact page.</p> <p>Selection box lookup fields: the [<i>Owner</i>] and [<i>Reporter</i>] fields on the activity page.</p>
Boolean	<p>Can contain one of the two logic values: “Yes/No.”</p> <p>A boolean field cannot be required.</p>	<p>Checkbox fields, such as the [<i>Remind owner</i>], [<i>Remind author</i>] fields on the activity page.</p>

To **add a new field** to the section:

1. Open the relevant section, e. g., [*Requests*].
2. Click [*View*] → [*Open Section Wizard*].
3. Take the following steps in the [*Section pages*] block of the Section Wizard:
 - Click [*Edit page*] if the section has a single page.
 - Click the **link to the relevant page** if the section has several pages.
4. Select the needed column type in the [*New column*] area and drag it to the page, similarly to adding existing columns (Fig. 6).

Dragging a new column to the section page will add a new field of the corresponding type and a new corresponding column to the database.

Fig. 6 Adding a new column to the record page



Attention. When you add a new field to a page and save the changes in the Section Wizard, Creatio will add the corresponding column to the section object as well.

5. Specify the parameters of the new column and the field from which to populate the column (Fig. 7). The set of available parameters differs depending on the type of field.

Fig. 7 Set up the parameters

Column

SAVE CANCEL

General

Title*

Subcategory

Code*

UsrRequestSubcategory

Required

Copy this value when copying records

Data source

Lookup*

RequestSubcategory

Lookup view

Selection window

List

On lookup value deletion:

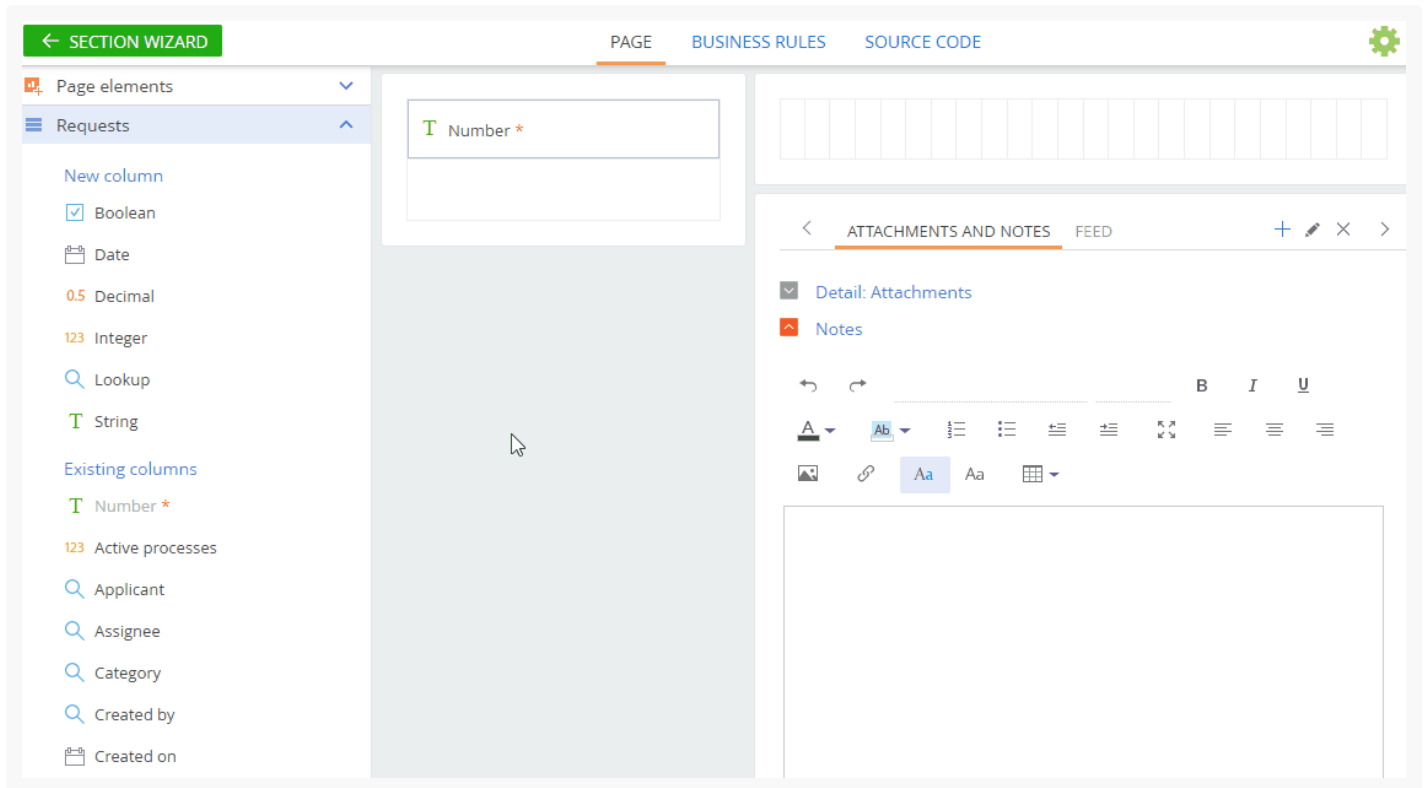
Set up the “String” type field

When managing string columns, you can use single line text fields or multiline text fields.

The [*Multiline text*] checkbox is unique to “String” type fields. Multiline text fields have variable heights and are designed for entering larger volumes of text that might take several paragraphs. For example, the [*Result details*] field on an activity page is a multiline field. If you select the [*Multiline text*] checkbox, you will be able to modify the field height in the Page Designer by dragging (Fig. 8).

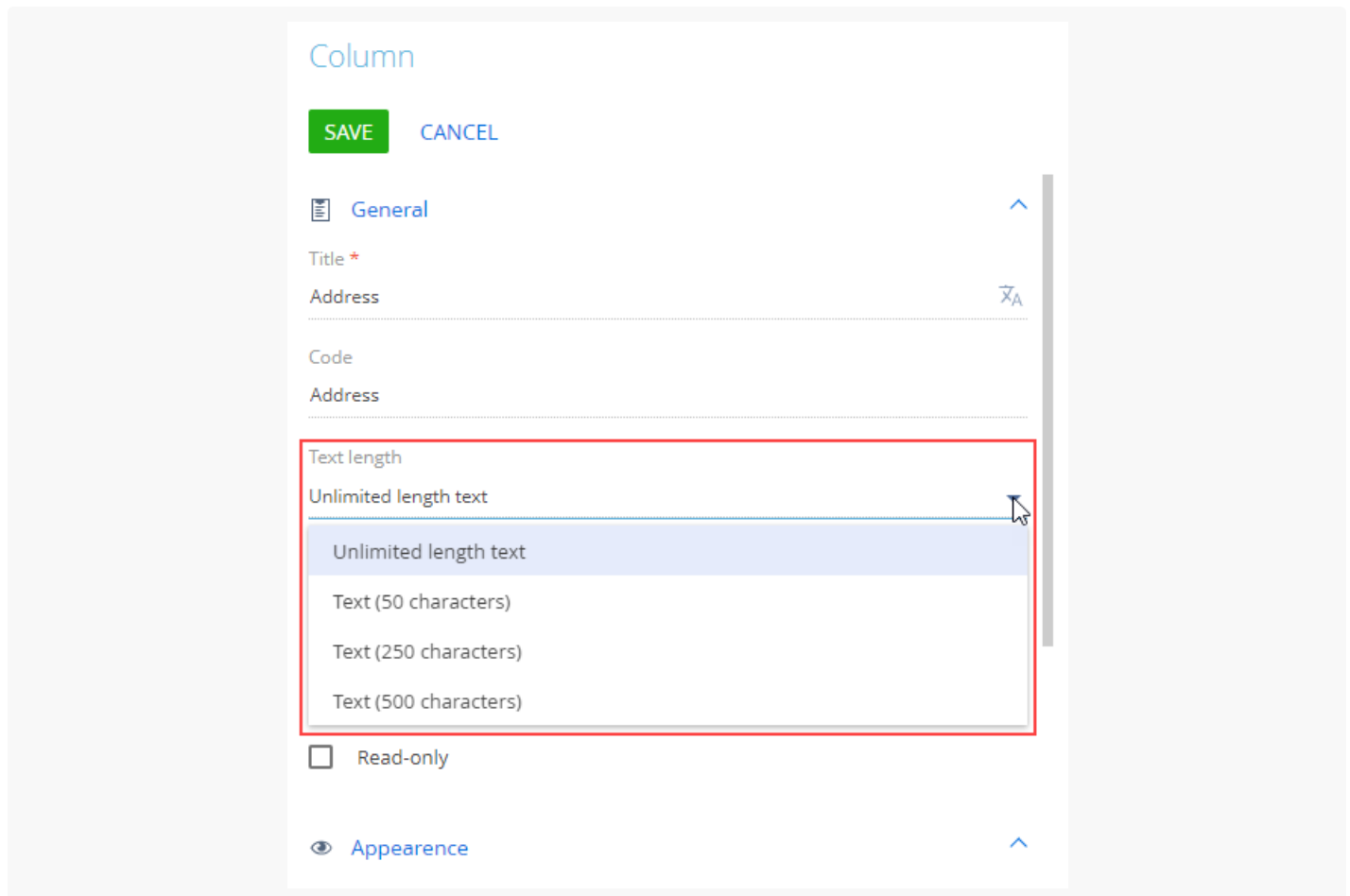
Leave the [*Multiline text*] checkbox clear to add a single line text field.

Fig. 8 Resizing a multiline field



Specify how many characters a page field can contain in the [*Text length*] field (Fig. 9). You can set the [*Text length*] field value to 50 characters, 250 characters, 500 characters, or make the field length unlimited.

Fig. 9 Specify the text length



Note. Text field length setup for the [*Pre-configured page*] business process element in the Pre-configured Page Designer works similarly.

Set up the “Decimal” type field

The “Decimal” field lets you customize the precision of decimal numbers, ranging from 1 to 8 digits after the decimal point (Fig. 10). You can also select “Integer” to change the field type to “Integer”. Select “Currency” if you intend to use the field with financial data.

Fig. 10 Customize the number precision in the “Decimal” column

The screenshot shows a 'New column' dialog box with a 'SAVE' button and a 'CANCEL' button. Below the buttons is a 'General' tab. The 'Title' field is marked with a red asterisk. The 'Rating' field has a small icon to its right. The 'Code' field is also marked with a red asterisk. The 'UsrRate' field is visible below. A red box highlights the 'Precision' dropdown menu, which is currently set to 'Decimal (0.01)'. The dropdown menu is open, showing the following options: 'Decimal (0.01)', 'Decimal (0.1)', 'Decimal (0.001)', 'Decimal (0.0001)', 'Decimal (0.00000001)', 'Integer', and 'Currency'. A mouse cursor is pointing at the 'Decimal (0.1)' option.

Note. Lowering the number precision for existing “Decimal” fields will make the calculated data based on these fields less accurate.

Set up the “Date/time” type field

You can use the [*Format*] field to select the date format when setting up a “Date/Time” column for your section page (Fig. 11). The [*Format*] field provides the following options:

- “Date.” The field will only display the specified date in the corresponding format.
- “Time.” The field will only display the specified time.
- “Date/Time.” The field will display both the specified date and time.

Fig. 11 Specify the “Date/Time” column format

When you modify the “Date/Time” column format for the existing section, the data in this column is updated for existing records as well. If the new column format is less precise than the previous format, the data for existing records also becomes less precise. For example, if you change the “Date/Time” format to “Date”, the time data will not display. In this case, Creatio will display a corresponding notification.

Note. “Date/Time” column format setup for the [*Pre-configured page*] business process element in the Pre-configured Page Designer works similarly.

Set up the “Lookup” type field

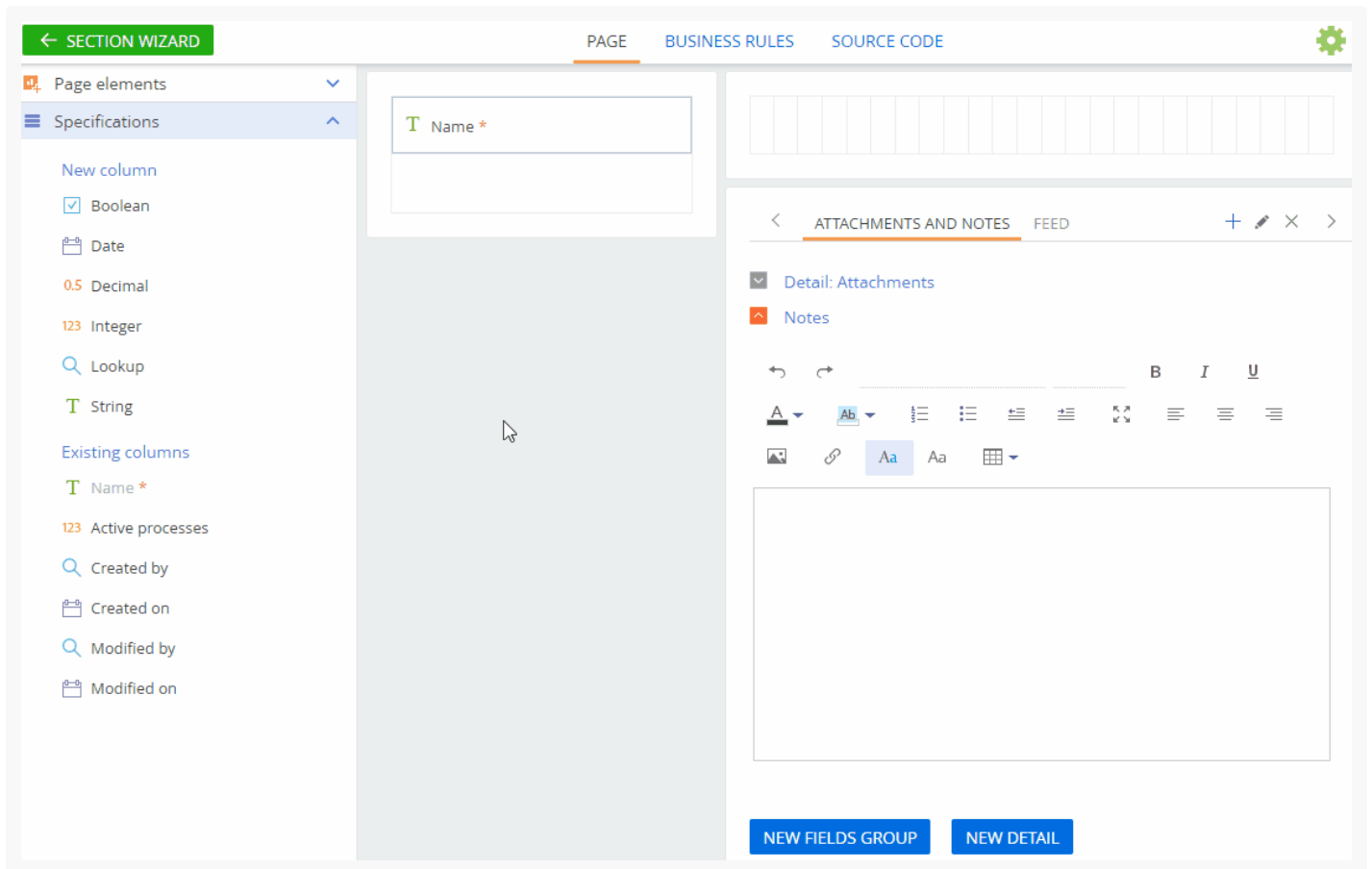
Fill out the “Lookup” field by selecting a value from a list. To set up this field, specify the object to use as the lookup, the lookup view, and the connection type between the records in the current object and the lookup object.

Lookup object

The list of lookup values is based on the records of a lookup object. Depending on whether the needed object already exists, select the [*Select existing lookup*] or [*Add new lookup*] option.

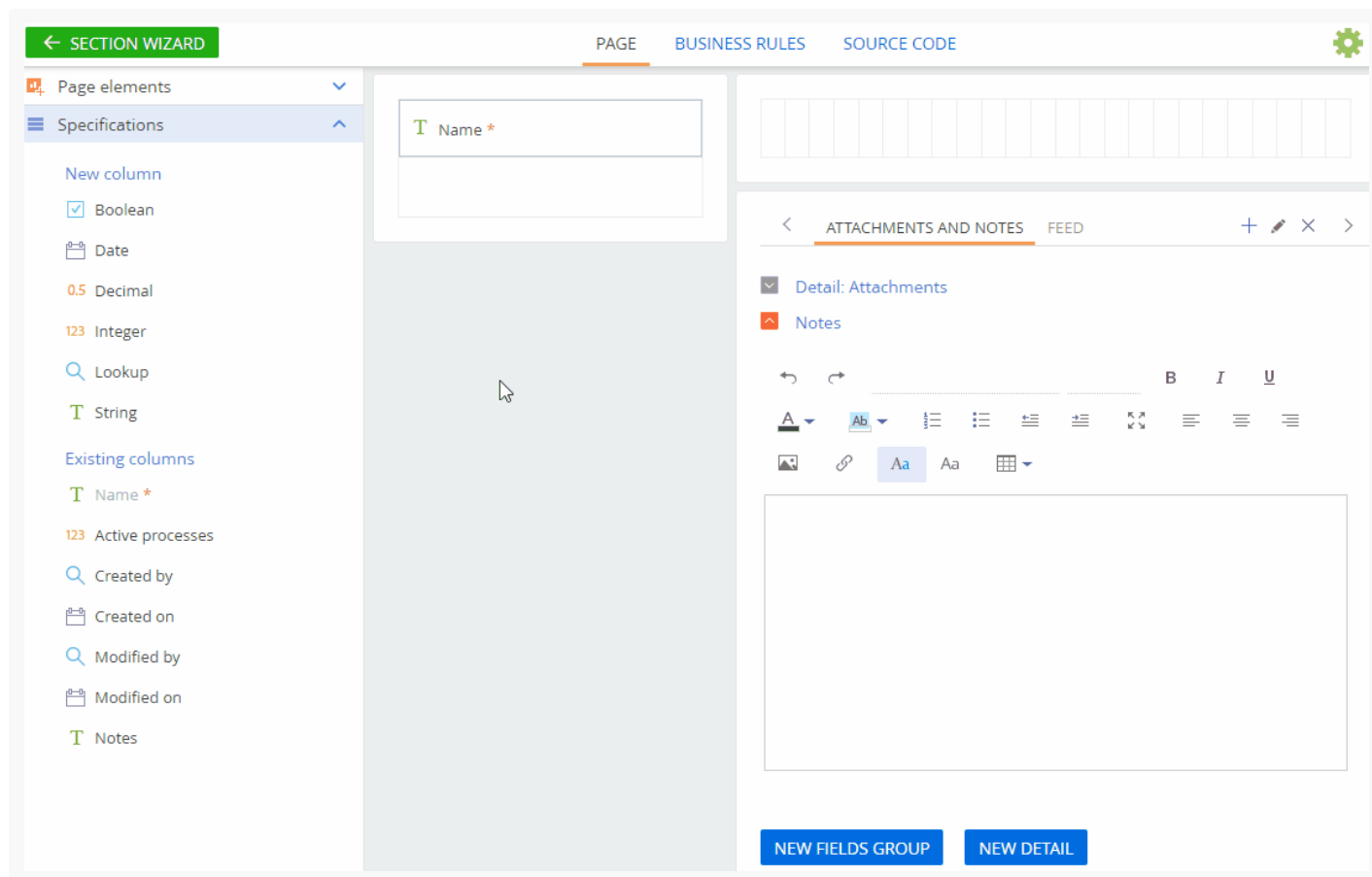
If you select an **existing lookup**, specify the lookup object in the [*Lookup*] field. For example, select the “Contact” object as a lookup for the [*Owner*] field (Fig. 12).

Fig. 12 Selecting an existing lookup



Select [*Add new lookup*] to add a new Creatio object. Specify the name and title for the new lookup object (Fig. 13):

Fig. 13 Adding a new lookup field



1. Specify a title that distinguishes the lookup object from other objects in the [*Title*] field.
2. Specify a code for the new lookup object in the database in the [*Name*] field. The object name must contain a prefix. You can specify the prefix in the “Prefix for object name” (“SchemaNamePrefix” code) system setting. The prefix is set to “Usr” by default.

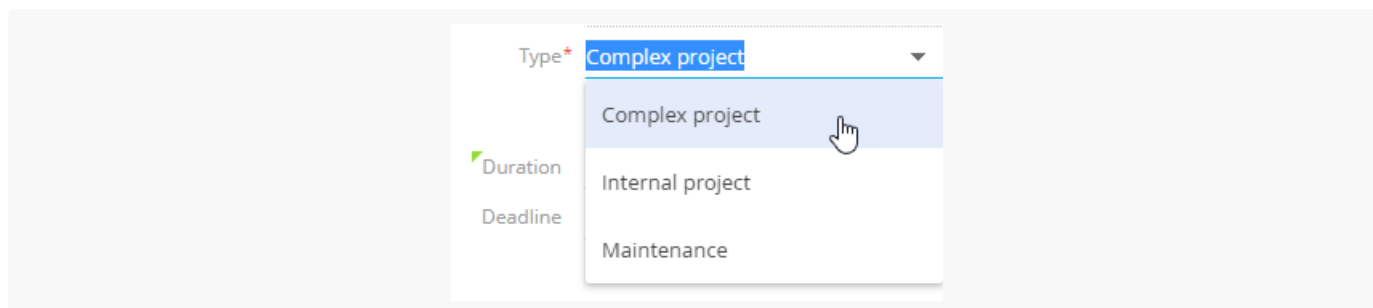
Note. Saving the changes in the Section Wizard will automatically register a new lookup in Creatio and bind this lookup to the package where the Wizard saves changes. The lookup name will match the name specified in the [*Title*] field. You can view and modify the lookup content via the [*Lookups*] section. Learn more in a separate article: [Manage lookup values](#).

Lookup view

The lookup view determines the field type that represents a lookup column on a page:

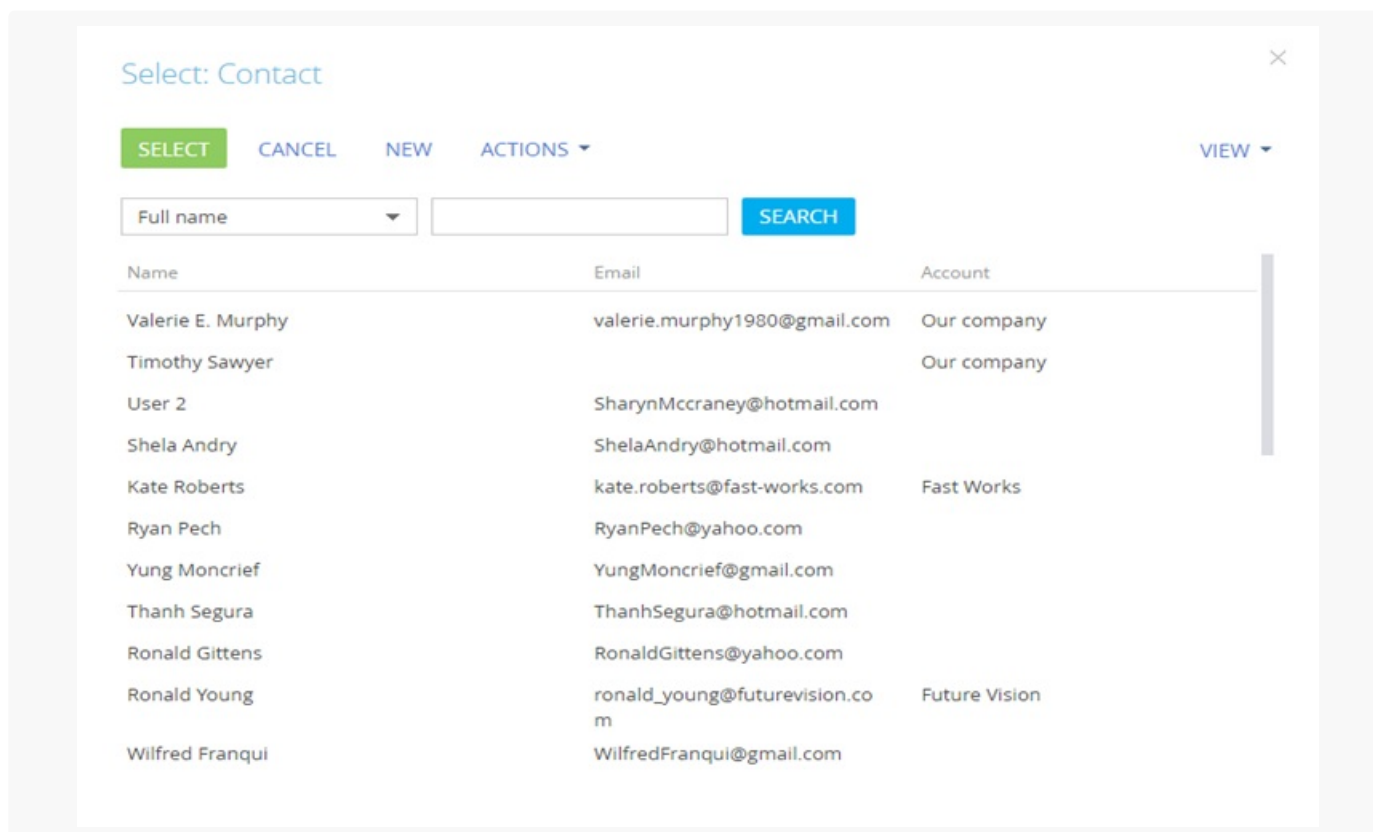
- Select the “**List**” view to make the lookup field a drop-down list (Fig. 14). This view is a good option for fields that contain a small number of lookup values.

Fig. 14 A drop-down list view of a lookup field



- Select the “**Selection window**” view to make the field open a selection box that contains lookup values (Fig. 15). Filter, edit or delete existing lookup records, as well as add new records in the box. This view is a good option if you use an object of a different section, e. g., [*Contacts*], as a lookup.

Fig. 15 A lookup selection box



- If you want to preserve detail records when you delete the record to which the detail is linked, select the [*Block deletion if there are connected records with these values*] option. Otherwise, select [*Delete records with this value*] (Fig. 16).

Fig. 16 Block the record deletion

New column

SAVE CANCEL

Code *

UsrContact

Required

Copy this value when copying records

Data source

Lookup *

Contact

Lookup view

Selection window

List

On lookup value deletion:

Block deletion if there are connected records in Contact with those value

Delete records from Contact with this value

Add a tooltip to the field


1. Open the relevant section, e. g., [*Requests*].
2. Click [*View*] → [*Open Section Wizard*].
3. Take the following steps in the [*Section pages*] block of the Section Wizard:
 - Click [*Edit page*] if the section has a single page.
 - Click the **link to the relevant page** if the section has several pages.
4. Select a field that needs a tooltip and click . If such a field does not exist yet, add it.
5. Enter the text users are going to see in the [*Tooltip*] field of the column setup window (Fig. 17). You can add HTML markup to the tooltip. Use HTML to add bold text, lists, hyperlinks, and other formatting options.

Fig. 17 Add a tooltip to the field

Column

SAVE CANCEL

List

On lookup value deletion:

Block deletion if there are connected records in Application with those valu

Delete records from Application with this value

Editability

Read-only

Appearance

Hide title on page

Title on page

Tooltip

<p>The categories let you divide the applications into several flows: </p> ...

6. Click [Save].

As a result, the field on the record page will have an icon in the top left. Hover over the icon to see the tooltip (Fig. 18).

Fig. 18 View a tooltip

