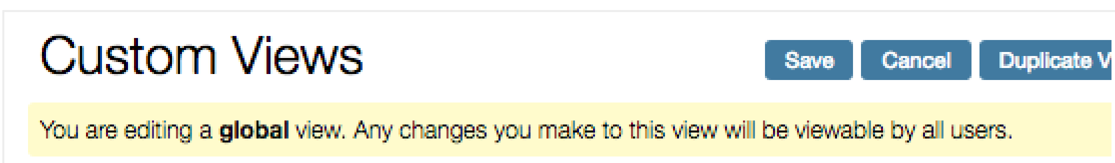
Creating New Views

The term "Views" in PlayMaker describes the data that is being shown when a user clicks on the Accounts, Contacts or Referrals tab. By default, users have a couple of pre-existing views. Additional views (or filtered tables of data) can be created, edited or deleted, providing the user control over how data is displayed. Defining Views provides an overview of what views are in PlayMaker as well as how they are most commonly used.

This article will describe the process of creating a new view from scratch. Views can also be created by duplicating existing views. The process for duplicating views can be found in Duplicating Views.

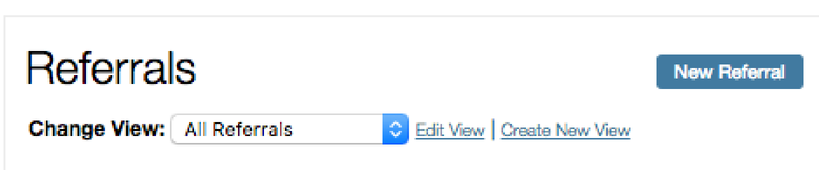
Global Views

Before creating and editing views, it is important to know that some views are global. Global views are seen by all users and should only be edited by Administrators. If a user choses to edit a global view, a warning will be displayed stating that the view is global (shown below). **Changes made and saved to a global view will modify the view for all users.**



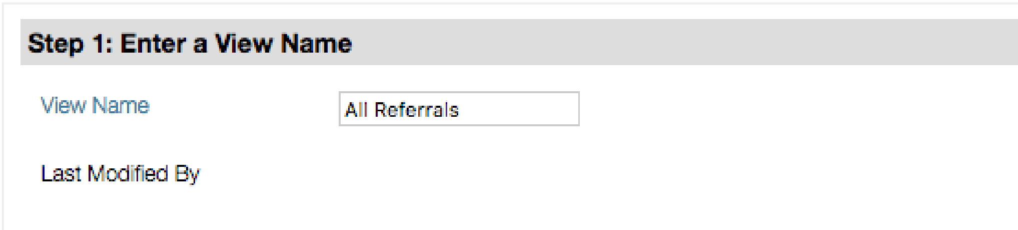
Creating a New View

- Navigate to the section that you would like to create a view for (Accounts, Contacts, or Referrals).
- Next to the *Change View* drop-down menu, click the *Create New View*link (pictured below).

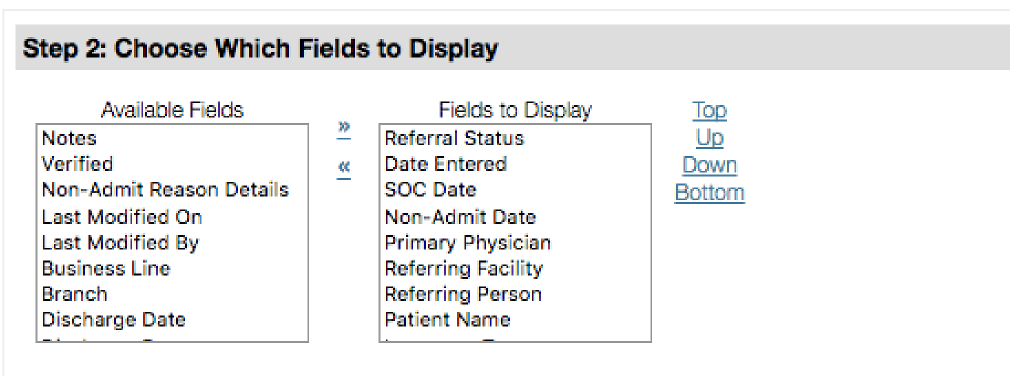


Views are broken into several Steps, each customizing the view to the user's needs.

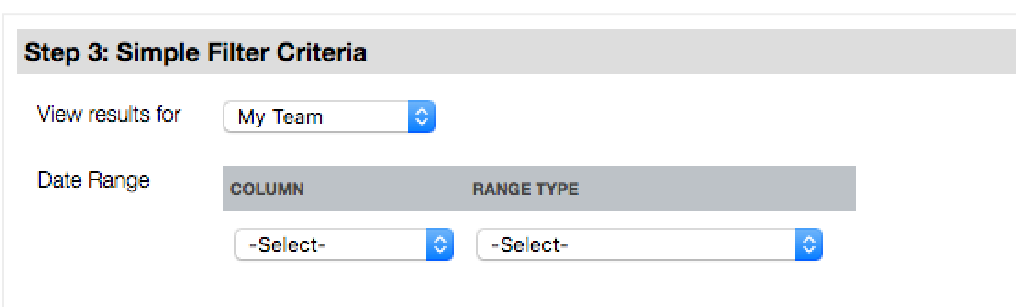
- *Step 1* is to provide a name to the view.
    - When naming views, PlayMaker suggests that users are as descriptive as possible. This makes it easy to understand what will data will load when the view is selected from the *Change View* drop-down.



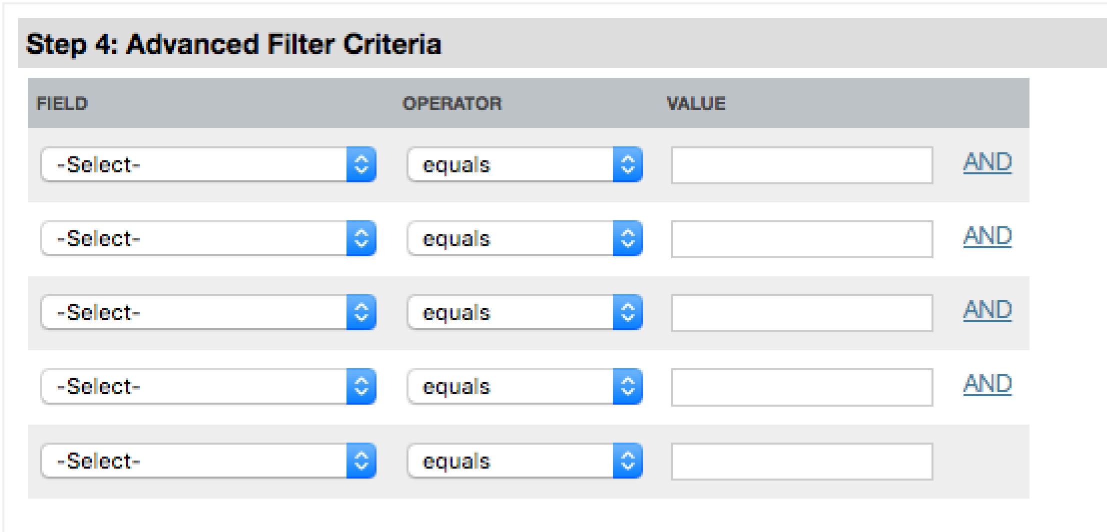
- In *Step 2*, users can select the data that they would like displayed in column headers of the view.
    - Selecting data fields in the box on the left and clicking the ">>" symbol will add the item to the box on the right, which will then be displayed in the new view.
    - Selecting items in the box on the right and clicking the "<<" symbol will move the item back to the box on the left, removing the data from the view.
    - The order of the criteria can also be adjusted by clicking on an item in the box on the right and clicking the *Top*, *Up*, *Down*, or *Bottom* links (picture below).



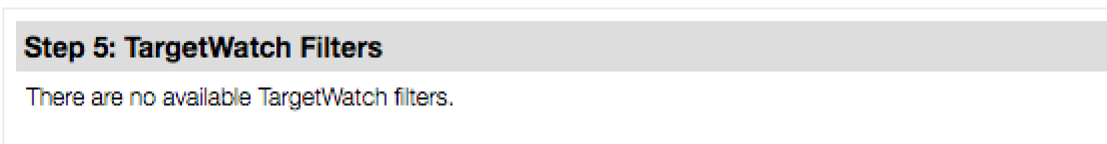
- *Step 3* defines whose content a user wants to view, and for what timeframe.



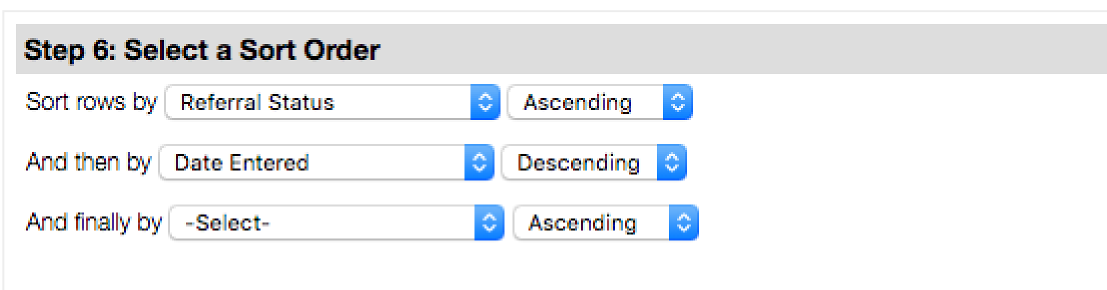
- *Step 4* allows users to select up to 5 filters to refine what records will show up. A more in-depth explanation of this step can be found in Advanced Filter Criteria for Views



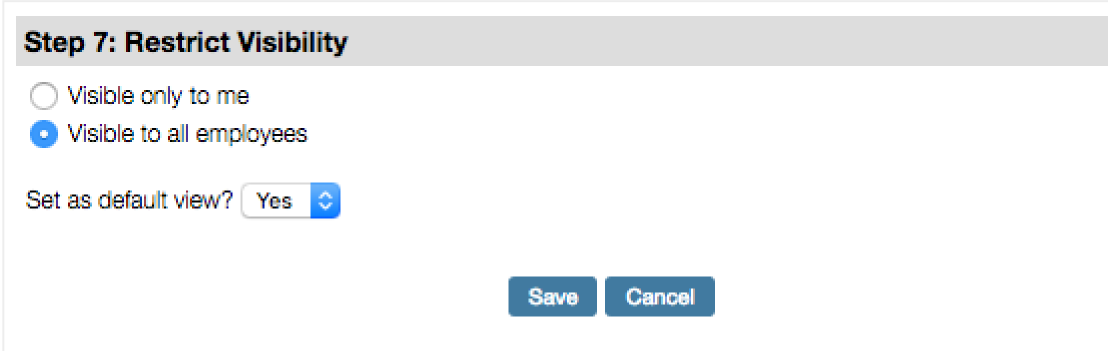
- *Step 5* allows users to add TargetWatch filters, if available.



- *Step 6* allows the sort order, with up to three levels of sorting.



- *Step 7* may vary depending on roles. For most users, this will allow the user to set the new view as the default view when loading this tab of data (Accounts, Contacts, or Referrals).



Clicking *Save* will then save the view, as well as load the view so that the user can review the data that has been requested. Should changes be desired, clicking *Edit View* next to the view name will allow adjustments to be made to refine the view.