

**The  
XRMS  
“Custom Fields”  
plugin**

**Administrators’ Guide**

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# About this document

## Introduction

This document describes the administration of version X1.0 of the `custom_fields` plugin for XRMS.

### **Warning!**

This is a beta test version of the `custom_fields` plugin: things may change before the final release.

## Copyright and use

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## Author

This document was written by Keith Edmunds. Suggestions, errors and requests for use other than described in the previous paragraph should be sent to [keith@tiger-computing.co.uk](mailto:keith@tiger-computing.co.uk).

## History

This plugin began life as the `server` plugin, and was specifically designed for a company that maintains servers at various customers' premises and wanted to record details of those servers within XRMS. It grew rapidly via contributions from both the core XRMS developers and external users, and was renamed the `info` plugin. This rapid growth and broadening of scope made the plugin far more useful, but it also made the code behind it too complex and very difficult to maintain. In the Summer of 2005 it was completely rewritten with a more appropriate internal architecture and was renamed the `custom_fields` plugin, the new name more accurately reflecting the role it had come to fill.

## What this and what it does

This plugin displays user-defined fields within XRMS. These fields may appear in a variety of places including:

- ◆ as an integrated part of the information displayed in the detail of contacts or companies
- ◆ as a separate section below the company details
- ◆ as an addition to the home, contacts or companies sidebar with a link to show more detail

The plugin needs to be configured by an administrator, but the data shown can be edited by all users.

## Installation

### Preparation

Before installation, ensure that the `include/plugin-cfg.php` file is writeable by the webserver process (typically Apache).

## Enabling the plugin

From the “Administration” screen click on “Plugin Activation” from the foot of the sidebar. On next screen tick the checkbox next to “custom\_fields” and click on the Submit button. The page should refresh with “plugin-cfg.php Config written successfully.” at the foot of the page.

### **Warning!**

Do not enable both the custom\_fields plugin and the info plugin on the same XRMS installation: this **will** break XRMS. If this is done inadvertently, edit the `include/plugin-cfg.php` file and remove one of the two plugins.

## Table creation

The current version of XRMS at the time of writing (September 2005) requires the custom\_fields database tables to be created manually although this may be automated in a future version of XRMS. To create them, the following information is required: the XRMS database name, the database username, and the database password. This information will be already defined in the `include/vars.php` file.

Issue the following command, substituting the appropriate values for the uppercase italicised words:

```
$ cd YOUR-XRMS-DIRECTORY/plugins/custom-fields
```

```
$ mysql -u XRMS-USERNAME -p XRMS-DATABASE < custom-fields.sql
```

Enter the XRMS database user password when prompted.

## Terminology

The custom\_fields plugin is a very flexible and powerful plugin, and in order to clearly describe its functionality and management it is necessary to define some terms.

### **Custom Field**

A *Custom Field* is the combination of a label and user data. Each field has a *type*; when being edited, the type determines how the user data may displayed (a radio button, checkbox, text box, text area or select box). When not being edited the user data is always shown as text. In the example below the label is shown in bold and the user data in normal font.

**Server Name:** MailServer01

### **Custom Fields Object**

A *Custom Fields Object* is a collection of one or more custom fields definitions . The Custom Fields Object does not contain any user data (see also *Object Instance*), but it does have a name (for example, “Servers”). Example:

**Server Name:**

**IP Address:**

**On maintenance contract?**

## Object Instance

An *Object Instance* is a specific instance of a Custom Fields Object. It differs from the Custom Fields Object by virtue of the fact that it includes user data. There may be multiple instances of a given Custom Fields Object. An example of an instance of the “Servers” Custom Fields Object might be:

**Server Name:** MailServer01

**IP Address:** 10.0.4.1

**On maintenance contract?** Yes

## Configuration

Configuration is carried out from the Manage Custom Fields screen, which in turn is accessed from the Administration screen by the Manage Custom Fields link located in the Plugins section. The layout of the Manage Custom Fields screen is shown below:

XRMS  
Open Source CRM

Logged in as: user1 • [Logout](#)

Manage Custom Fields

[Home](#) • [Activities](#) • [Companies](#) • [Contacts](#) • [Campaigns](#) • [Opportunities](#) • [Cases](#) • [Files](#) • [Reports](#) • [Administration](#) • [Preferences](#)

Custom Fields Object Name	Fields	Display On
<a href="#">Company Accounting</a>	<a href="#">Edit</a>	company_accounting
<a href="#">Contact Accounting</a>	<a href="#">Edit</a>	contact_accounting

**Add New Custom Fields Object**

Name

Display On

Custom Fields plugin X1.0

ScreenShot 1 The Manage Custom Fields screen

On the left are a list of all defined Custom Field Objects. There are two pre-defined objects listed, *Company Accounting* and *Contact Accounting*. The second column of the table contains a link to enable the fields of the object to be edited, and the third column states where the object data will be displayed. On the right is a form for creating new Custom Field Objects, and below that is the current version of the custom\_fields plugin.

## About Display On

There are seven locations that may display custom fields, each described below.

### company\_accounting

Fields displayed on company\_accounting are shown within the company detail screen. In the example below, the Accountant Name and VAT fields are custom fields displayed on company\_accounting:

Company Details : Bushwood Components

[Home](#) • [Activities](#) • [Companies](#) • [Contacts](#) • [Campaigns](#) • [Opportunities](#) • [Cases](#) • [Files](#) • [Reports](#) • [Administration](#) • [Preferences](#)

Changes saved.

Company Details		Categories	
Company Name	Bushwood Components	Account Status	<b>Approved</b>
Code	BUSH01	Credit Limit	\$100,000.00
Industry	Other	Rating	<b>Good</b>
CRM Status	Prospect	Terms	10 days
Account Owner	User One	Accountant Name	James Smith
Phone	8005552000	VAT	Yes
Alt. Phone	8005552001	Company Source	Other
Fax	8005552002		
URL	<a href="http://www.bushwood.com">http://www.bushwood.com</a>		
Address	11 Platinum Drive Los Angeles, CA 90001	Created	2003-01-01 by User One
		Last Modified	2005-09-17 by User One

(Bushwood Components is a fictitious company.)<p>This field can be used to hold a paragraph or two of text (either plain or <font color=blue><b>HTML</b></font>) about a company.

[Edit](#) [Admin](#) [Clone](#) [Addresses](#) [Divisions](#)

Opportunities		Open Cases	
No categories			
<a href="#">Manage</a>			
No matches			
<a href="#">Opportunity</a>	<a href="#">Type (G)</a>	<a href="#">Status (G)</a>	<a href="#">Close Date</a>
Select Column Layouts		Sales Opportunity	
<a href="#">New</a>	<a href="#">Search</a>		
No matches			
<a href="#">Case</a>	<a href="#">Priority (G)</a>	<a href="#">Type (G)</a>	<a href="#">Due</a>
No matches			
Select Column Layouts			

ScreenShot 2 An example of company\_accounting fields

## contact\_accounting

Fields displayed on contact\_accounting are very similar to those displayed on company\_accounting fields except that they are displayed within the contact detail page rather than the company detail page.

## company\_content\_bottom

Fields displayed on company\_contact\_bottom are shown as a separate section at the foot of the company detail page. In the following example some information about courses run for a company has been added to the foot of the company detail page:

Activities		Courses run	
<a href="#">Filter Activities</a>		<a href="#">Add</a> <a href="#">Done</a>	
No matches			
Select Column Layouts		Calendar View	
<a href="#">Export</a>		<a href="#">Mail Merge</a>	
<a href="#">Browse</a>			
Course Name	Etymology 101	Notes	Course was very well received with an average feedback mark of 9.98
Date	22 August 2005		
Number of attendees	7		
<a href="#">Edit</a>	<a href="#">Delete</a>		

ScreenShot 3 Example of company\_content\_bottom data

## Sidebar displays

There are four sidebar displays as detailed in the table below:

<i>Display on</i>	<i>Notes</i>
company_sidebar_bottom	Shown at the bottom of the sidebar on the company detail page
contact_sidebar_top	Shown at the top of the sidebar on the contact detail page
contact_sidebar_bottom	Shown at the bottom of the sidebar on the contact detail page
private_sidebar_bottom	Shown at the bottom of the sidebar on the home page

Each sidebar displays some details of the object concerned, and has a link to show the full detail. In this example the bottom of the company sidebar shows some information about a server at this company:

<b>Files</b>			
Name	Size	Owner	Date
No attached files			
<input type="button" value="New"/>			
<b>Servers</b>			
<a href="#">MailServer01</a>			
IP address		10.0.8.4	
<input type="button" value="New"/>			

*ScreenShot 4company\_sidebar\_bottom object*

# Creating and editing Custom Field Objects

## Editing the Company and Contact Accounting fields

To edit the Accounting objects, click on the Edit link in the Fields column. This displays the Edit Field Definitions screen as shown below:

XRMS Open Source CRM

Logged in as: user1 • [Logout](#)

Edit Field Definitions: Company Accounting

[Home](#) • [Activities](#) • [Companies](#) • [Contacts](#) • [Campaigns](#) • [Opportunities](#) • [Cases](#) • [Files](#) • [Reports](#) • [Administration](#) • [Preferences](#)

Label	Type	Default Value	Possible Values	Order
<input type="text"/>	text	<input type="text"/>	<input type="text"/>	<input type="text"/>

[Save Changes](#) [Save and add another field](#) [Back](#)

ScreenShot 5 The Edit Field Definitions screen

As there are currently no defined fields for this object, XRMS has helpfully inserted a blank field. By way of example, we will create two fields in the Company Accounting Object. The first will be a text field labelled “Accountant Name”, and the second will be a yes/no select box labelled VAT (a type of tax). In Label box type “Accountant Name” and click “Save and add another field”. The screen will now appear as follows:

XRMS Open Source CRM

Logged in as: user1 • [Logout](#)

Edit Field Definitions: Company Accounting

[Home](#) • [Activities](#) • [Companies](#) • [Contacts](#) • [Campaigns](#) • [Opportunities](#) • [Cases](#) • [Files](#) • [Reports](#) • [Administration](#) • [Preferences](#)

Label	Type	Default Value	Possible Values	Order	
Accountant Name	text	<input type="text"/>	<input type="text"/>	0	<a href="#">Delete</a>
<input type="text"/>	text	<input type="text"/>	<input type="text"/>	<input type="text"/>	

[Save Changes](#) [Save and add another field](#) [Back](#)

ScreenShot 6 Adding custom fields to an object

To define the second field, type “VAT” in the blank Label box and select “select” in the Type box. The range of possible values should be comma-separated, so before saving the screen will look as follows:

XRMS Open Source CRM

Logged in as: user1 • [Logout](#)

Edit Field Definitions: Company Accounting

[Home](#) • [Activities](#) • [Companies](#) • [Contacts](#) • [Campaigns](#) • [Opportunities](#) • [Cases](#) • [Files](#) • [Reports](#) • [Administration](#) • [Preferences](#)

Label	Type	Default Value	Possible Values	Order	
Accountant Name	text	<input type="text"/>	<input type="text"/>	0	<a href="#">Delete</a>
VAT	select	<input type="text"/>	Yes,No	<input type="text"/>	

[Save Changes](#) [Save and add another field](#) [Back](#)

ScreenShot 7 The completed company\_accounting field definitions

Click on the Save Changes button to return to the Manage Custom Fields screen.

## Creating a company\_content\_bottom object

In this example, we will create an object to display details of training courses we have run for each company. On the right of the Manage Custom Fields screen, create a “Courses run” object to be displayed on company\_content\_bottom as follows:

ScreenShot 8Creating the "Courses run" object

After clicking on Add, the “Courses run” object will appear in the Custom Fields Object Name list on the Manage Custom Fields page. Click on the corresponding Edit link and fill in the definitions as shown below. After entering the first field, Course Name, click on “Save and add another field” and enter the second field. Continue in this way until all field definitions are entered:

Field Definitions						
Label	Type	Default Value	Possible Values	Order	Column	
Course Name	text			0	1	Delete
Date	text			1	1	Delete
Number of attendees	text			2	1	Delete
Notes	textarea				2	

ScreenShot 9Field definitions for the "Courses run" object

Note that the “Notes” field is of type “textarea” and also that it is to be displayed in column 2. The “order” and “column” attributes are discussed further in the next section. Click on “Save Changes” and go to a company detail page. The foot of that page now has an empty “Courses run” object:

ScreenShot 10Empty "Courses run" display

A user can click on “New” to enter details of a new course run. The example below shows two courses that have been added to a company page:

Courses run	
Course Name: Etymology 101 Date: 22 August 2005 Number of attendees: 7	Notes: Course was very well received with an average feedback mark of 9.98
<input type="button" value="Edit"/> <input type="button" value="Delete"/>	
Course Name: Housework for men 101 Date: 2 September 2005 Number of attendees: 2	Notes: Candidates were not well motivated.
<input type="button" value="Edit"/> <input type="button" value="Delete"/>	
<input type="button" value="New"/>	

ScreenShot 11 Two "Courses run" objects

Note that each entry has its own Edit and Delete button, and that there is one New button for adding more courses.

### Creating a sidebar object

For this example, we will create a “Servers” object and have it display at the foot of the company sidebar. On the right of the Manage Custom Fields screen, create an object named “Servers” to be displayed on company\_sidebar\_bottom. Add the fields as described earlier on page 9 to get the field definitions shown below:

Field Definitions							
Label	Type	Default Value	Possible Values	Order	Column	Display in Sidebar?	
Server Name	text			0	1	<input type="checkbox"/>	<input type="button" value="Delete"/>
IP address	text			1	1	<input checked="" type="checkbox"/>	<input type="button" value="Delete"/>
Automatic backups?	checkbox			2	1	<input type="checkbox"/>	<input type="button" value="Delete"/>
Vendor	select		HP,IBM,Dell	3	1	<input type="checkbox"/>	<input type="button" value="Delete"/>
Configuration Notes	textarea			0	2	<input type="checkbox"/>	<input type="button" value="Delete"/>
Name field: <input type="text" value="Server Name"/> <input type="button" value="Save Changes"/> <input type="button" value="Add new field"/> <input type="button" value="Back"/>							

ScreenShot 12 Field definitions for sidebar object

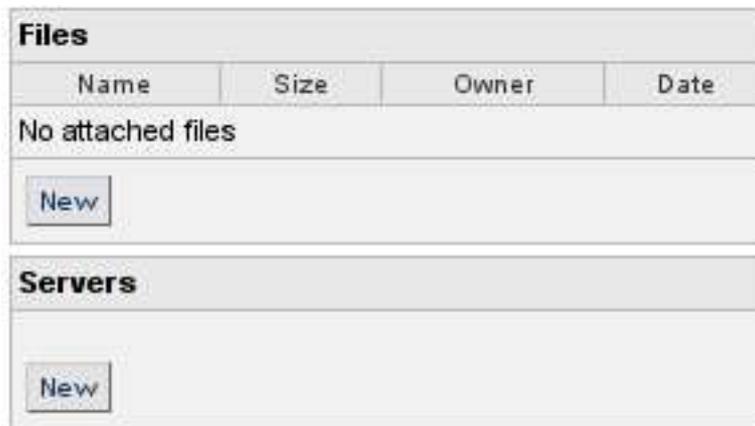
Note the following points:

1. The “IP address” field will be displayed in the sidebar (“Display in Sidebar” is checked), but the other fields will only be visible in the detailed view.
2. Two columns are used, with “Configuration Notes” appearing in column two. There is no limit to

the number of columns that can be defined, and each column can be given any arbitrary name. Columns will be displayed in alphabetical order, so "8" comes before "9", "10" comes before "2", and "middle" comes after "first" and also after "last".

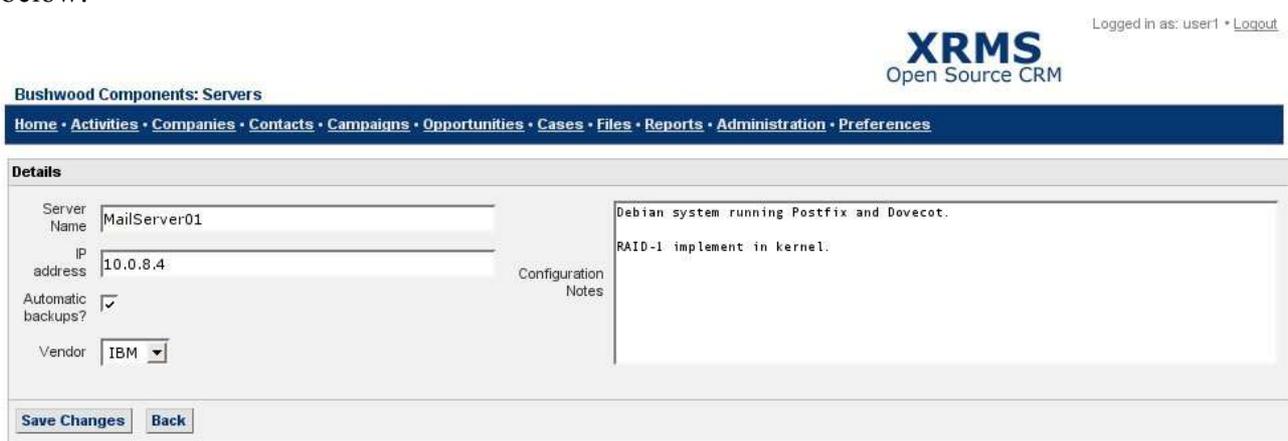
3. Within in any one column the fields are displayed in the order dictated by the "order" attribute following the same rules as for columns. If no order is specified then fields will be displayed in the order in which they are created.
4. Any field can be deleted by clicking on the "Delete" button. **Note: currently there is no confirmation before the field is deleted.**
5. At the foot of the screen the "Name field" selector. The field selected here will be used as the text of the link to display the full details of this object (see below). Only text fields may be selected as the Name Field.

After saving the above definitions, an entry will appear at the foot of the company sidebar:



ScreenShot 13Sidebar with empty object

Clicking on the New button will allow a specific instance of a Servers object to be defined as shown below:



ScreenShot 14Defining a sidebar instance

After saving this definition, the corresponding company sidebar will appear as shown below:

Files			
Name	Size	Owner	Date
No attached files			
<a href="#">New</a>			

Servers	
<a href="#">MailServer01</a>	
IP address	10.0.8.4
<a href="#">New</a>	

ScreenShot 15 Company sidebar object

Note that the IP address (only) is show in the sidebar, and that the link to show the full details is the name of the server (the “Name field” defined for this object). Clicking on that link shows the full details:


Logged in as: user1 • [Logout](#)

**Bushwood Components: Servers**

[Home](#) • [Activities](#) • [Companies](#) • [Contacts](#) • [Campaigns](#) • [Opportunities](#) • [Cases](#) • [Files](#) • [Reports](#) • [Administration](#) • [Preferences](#)

Server Name: MailServer01 IP address: 10.0.8.4 Automatic backups?: yes Vendor: IBM	Configuration Notes: Debian system running Postfix and Dovecot. RAID-1 implement in kernel.
<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Back</a>	

ScreenShot 16 Detail view of sidebar object

## Feedback, bugfixes, suggestions

All of the above are welcomed. Please send to [keith@tiger-computing.co.uk](mailto:keith@tiger-computing.co.uk).

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