Defining Views

Overview

This article will provide an overview of what a "View" is, how they are used in PlayMaker, and break down the elements that can be adjusted to display more relevant data.

As a CRM, it's important for users to be able to organize Accounts, Contacts and Referrals. 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 to switch between. The most basic two would include:

- "All": a view that is showing the user all of the records of that type (such as "All Accounts")
- "My": a view that displays all of the records assigned to that user (i.e. "My Contacts")

Additional views can be created to refine the data being displayed. That process is covered in Creating New Views

Uses for Views

Views are commonly used to view Account and Contact ownership (via the assigned shared owner), as well as to view referral records and activity. Some users will use views to have an on-demand visual report of what pending referrals they have, while another user may create a view to sort contacts by address, to determine if there are physicians close to each other that they may want to visit. Views are also the location users will go to search for an Account, Contact or Referral, to be able view details for that particular record.

Changing Views

When a user first clicks on the Accounts, Contacts or Referrals tab, the default view for those records is displayed. This view usually displays the records that are assigned to that user. A user can change views at any time by clicking on the *Change View* drop-down menu and selecting the desired view (shown below). Once selected, the view will load automatically.
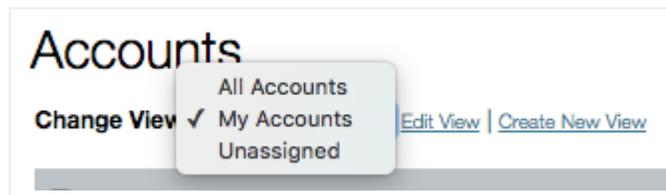
Table Layout & Functions

The column headers at the top of the table describe the content listed below in that column. Each row represents an individual record (Account, Contact or Referral)

The first column on the left is a selection tool. Checking the box in the header will select all visible records in this view. After records are selected, a user can use the *Bulk Actions* drop-down menu (found just below the table of records, and show in the screenshot below) to perform certain actions, such as requesting ownership of the record, or removing themselves from as an owner of a record. *Due to role permissions, not all of the options listed in the following screenshot below may be available for each user.*
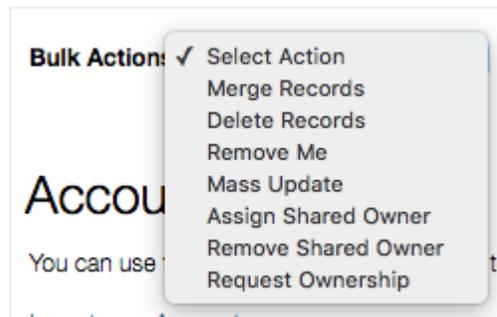
The second column (*Actions*) allows users to click *View* the details of a record. This column may also be a quick access point to edit a record by clicking the *Edit* link. If the *Edit* option is not available in this column, it is due to role permission limitations. As mentioned above, an Administrator can adjust role permissions to allow editing should that be something that is necessary for all users of that role to have the ability to do.

Found below the table is a drop-down menu that allows a user to change the number of records being displayed. The default view is 10 records, but some views can be expanded to show up to 500 records at a time by selecting a different value from the *Display* drop-down (screenshot shown below). This default number can be changed in the *My Profile* area for each user. Should multiple pages of records be available, navigational arrows are shown below the list to go to the next page or

last page, as well as a text box that allows a user to enter a page number to jump straight to that page.
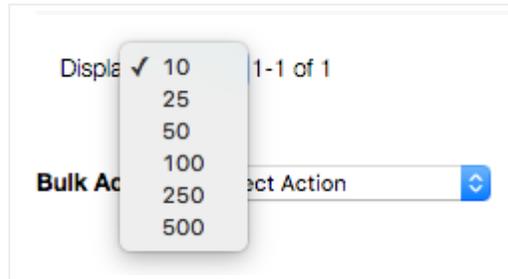
Custom views are able to be created, and existing views can be edited to provide users with records or data that is more relevant. To learn more about creating or editing views, refer to the Related links below.