Customer Object

Creating and populating the Customer Object

The Customer object is one of the most central objects in the system. Opportunities, Proposals and Jobs are all related to the Customer object.

Customer

Integer id
Text name
Text physicalAddress1
Text physicalAddress2
Text physicalCity
Picklist physicalState
Text physicalZipCode
Text emailAddress
Phone phoneNumber
Text billingAddress1
Text billingAddress2
Text billingCity
Picklist billingState
Text billingZip
Checkbox sendXmasCard

Relationships

Relationship Customer Contact
Relationship Proposal
Relationship Opportunity
Relationship Job

Permissions

Permission administrators

Views

View new
View edit
View view

Object: New Object

[Save] [Cancel]

Object Properties

Define a singular and plural name for this object definition. These names will be used throughout your account to refer to one or more records of this type.

Singular Name	Customer	**Example: Project**
Plural Name	Customers	**Example: Projects**

What are Records of this object called? The Record Name field is used in pages, views, selectors, and search results that reference records of this object. Once this object has been created you can customize the display format of the Record Name field using merge fields.

Record Name	Customer	**Example: Project**

The Integration Name is used to reference this object via merge fields and the Web Services APIs. This name must be unique. Be careful when changing the Integration Name as it may affect existing templates, formulas and integrations.

Integration Name	ccCustomer	**Example: Project**
Description		

This is the first object since we did the Company object to have a state picklist. We will use the shared state list and use it in the object definition. We setup all of the other fields as we did on the Company object, so we won't duplicate those here. Again, we used the cc prefix in the integration name. One technique worth mentioning is the fact that we plan on tracking both the physical address and the billing

address for this company. As we saw with a lot of defaults in the Company object, we don't want to create a bunch of redundant words, so we'll add those fields with "friendly" field labels (Address 1, Address 2, …), but the integration name for those fields will indicate whether they are physical or billing. Then on the UI screen, we'll group them as such in their own sections.

When we get to the Physical State field, we will focus on using the existing state list. To do that, you choose the "Shared As" section and Use Existing Share from ccState as shown below. Notice: Field Label is "State" and integration name is "physical_state". *(Note: After selecting ccState, the integration name changes to ccState and CANNOT be edited.)* I consider this to be a bug, as we cannot use the same technique for the Billing State. Therefore, for that field, we'll simply copy/paste the list from one field to the other. If you need to get around this, then I highly suggest using a State object within your system. That's overkill for what we're doing on this project.
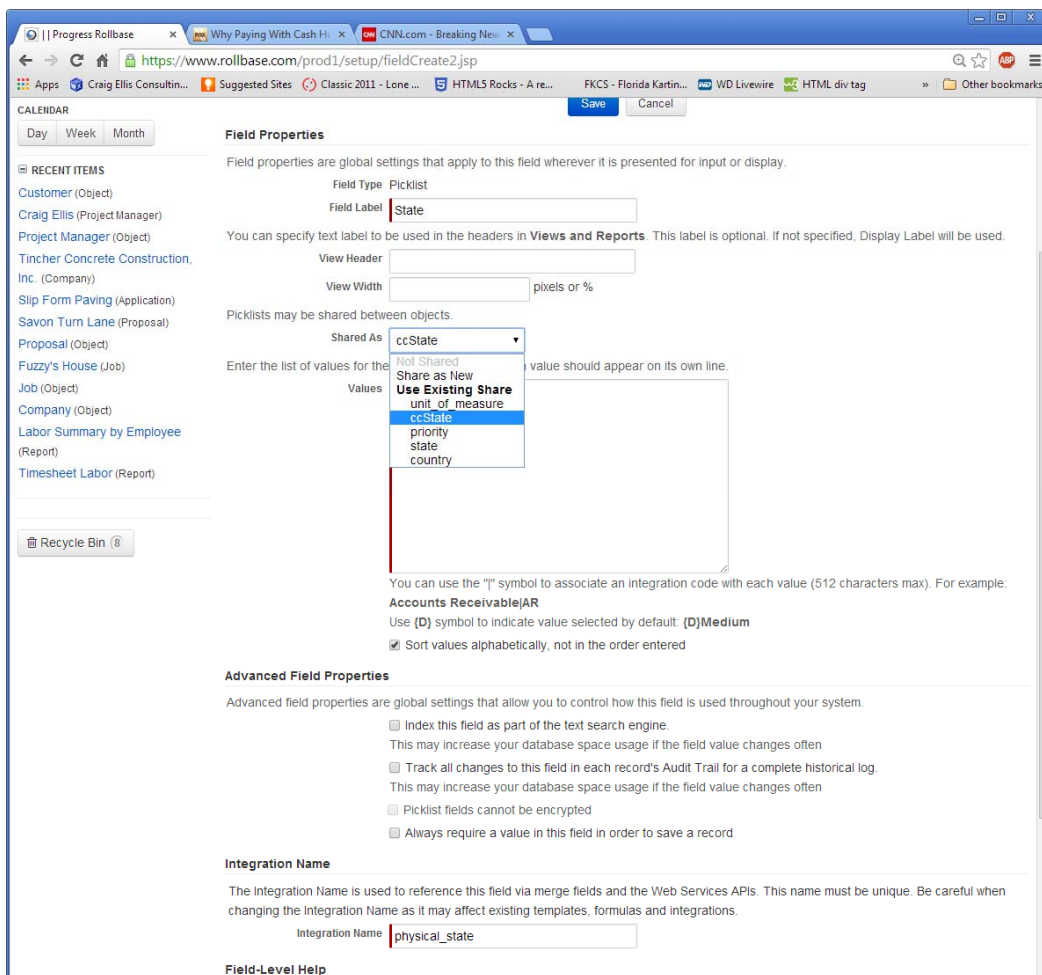
As with other objects, when you are done, you can customize the New/View/Edit screens to your liking.