View Creator – User Manual

Create personal or system view based on selected entity's form/s

Select the type of view :

○ System View   ● Personal View

Select entity :   [Account   ▼]

Select the form/s type for which view is needed :

☐ Account (Main)   ☐ Account Card form (Card)
☐ Account Hierarchy Tile Form (Quick View Form)   ☐ Account Quick Create (Quick Create)
☐ Account Reference Panel (Quick View Form)   ☐ Account for Interactive experience (Main - Interactive experience)
☐ Recent Cases and Entitlements (Quick View Form)   ☐ Social Profiles (Quick View Form)
☐ account card (Quick View Form)

Consider hidden fields :

☐ Want to consider hidden fields in the view?

Enter the name of view :   [Please enter the name of the view to be created]

Click on proceed button to create a view in CRM with all the fields present in above selected form/s.   [Proceed]
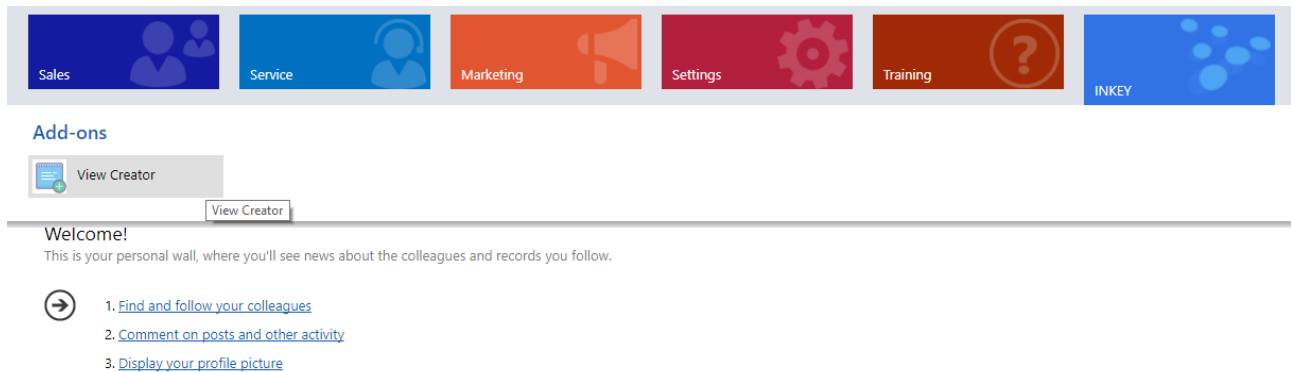
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View Creator User Guide

Follow below steps to configure ViewCreator tool:-

1. Click on 'INKEY' sitemap area on your CRM instance. Then, click on 'View Creator' button.

2. Select the type of the view to be created. (System or Personal view)

3. Now select an entity for which you want to create a view.

Here, Account entity is selected. And, when you select an entity, all it's form types will be listed below.

4. Select single or multiple form types for which you want to create the view.
Note:- All the fields on the selected form types will be displayed in the view that will be created.

5. Check the box (**Consider hidden fields**) if you want to include the hidden fields on the selected form/s in the view to be created.

6. Then, enter the name of the view to be created.

7.Finally, click on the Proceed button. And, if everything goes well. The view for the selected entity, with all the fields in the selected form types will be created. You can find the newly created view in the advance find window or on the landing or list page of the entity.

Create personal or system view based on selected entity's form/s

✔ Your view is created successfully. Please find it on landing or list page of the entity or in advanced find window.

Select the type of view :

○ System View   ● Personal View

Select entity : | Account   ▼ |

Select the form/s type for which view is needed :

☑ Account (Main)   ☐ Account Card form (Card)
☑ Account Hierarchy Tile Form (Quick View Form)   ☐ Account Quick Create (Quick Create)
☐ Account Reference Panel (Quick View Form)   ☐ Account for Interactive experience (Main - Interactive experience)

☐ Recent Cases and Entitlements (Quick View Form)   ☐ Social Profiles (Quick View Form)

☐ account card (Quick View Form)

Consider hidden fields :

☑ Want to consider hidden fields in the view?

Enter the name of view : | Account Personal View |

Click on proceed button to create a view in CRM with all the fields present in above selected form/s.   [Proceed]