



Color Views

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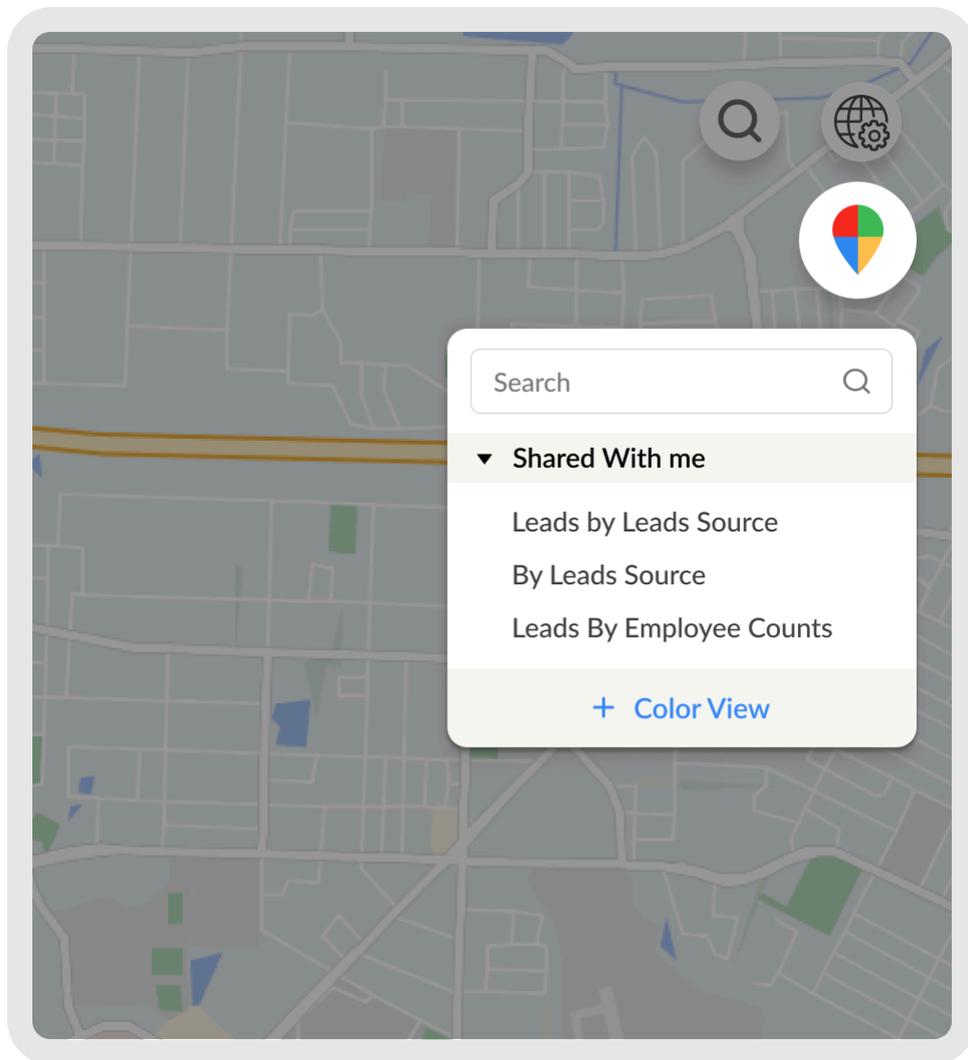
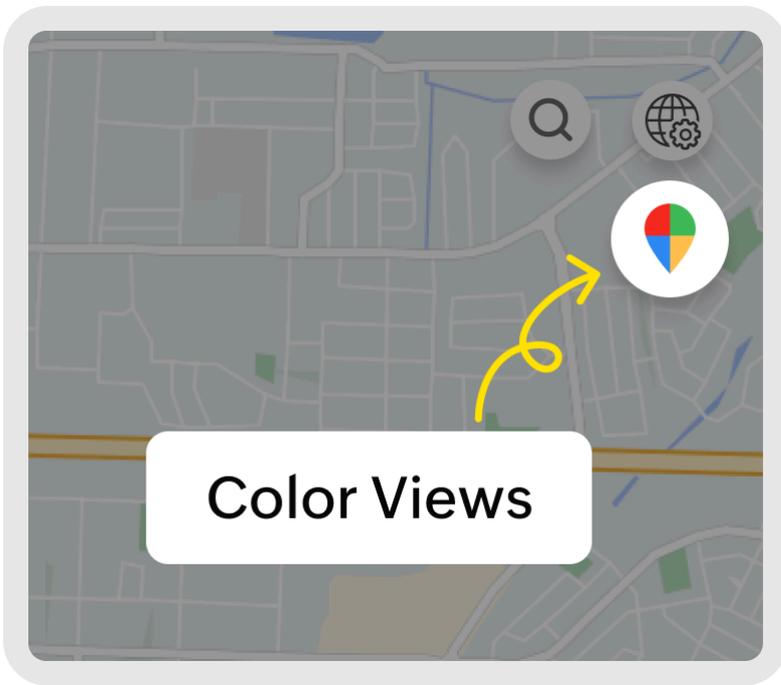
▸ Criteria Components

The Color View allows users to visualize their CRM data on a map as different colored pins based on the criteria they apply. This feature is useful for organizing and identifying different types of records based on specific characteristics.

i Feature Availability: This feature is only available in the Professional plan.

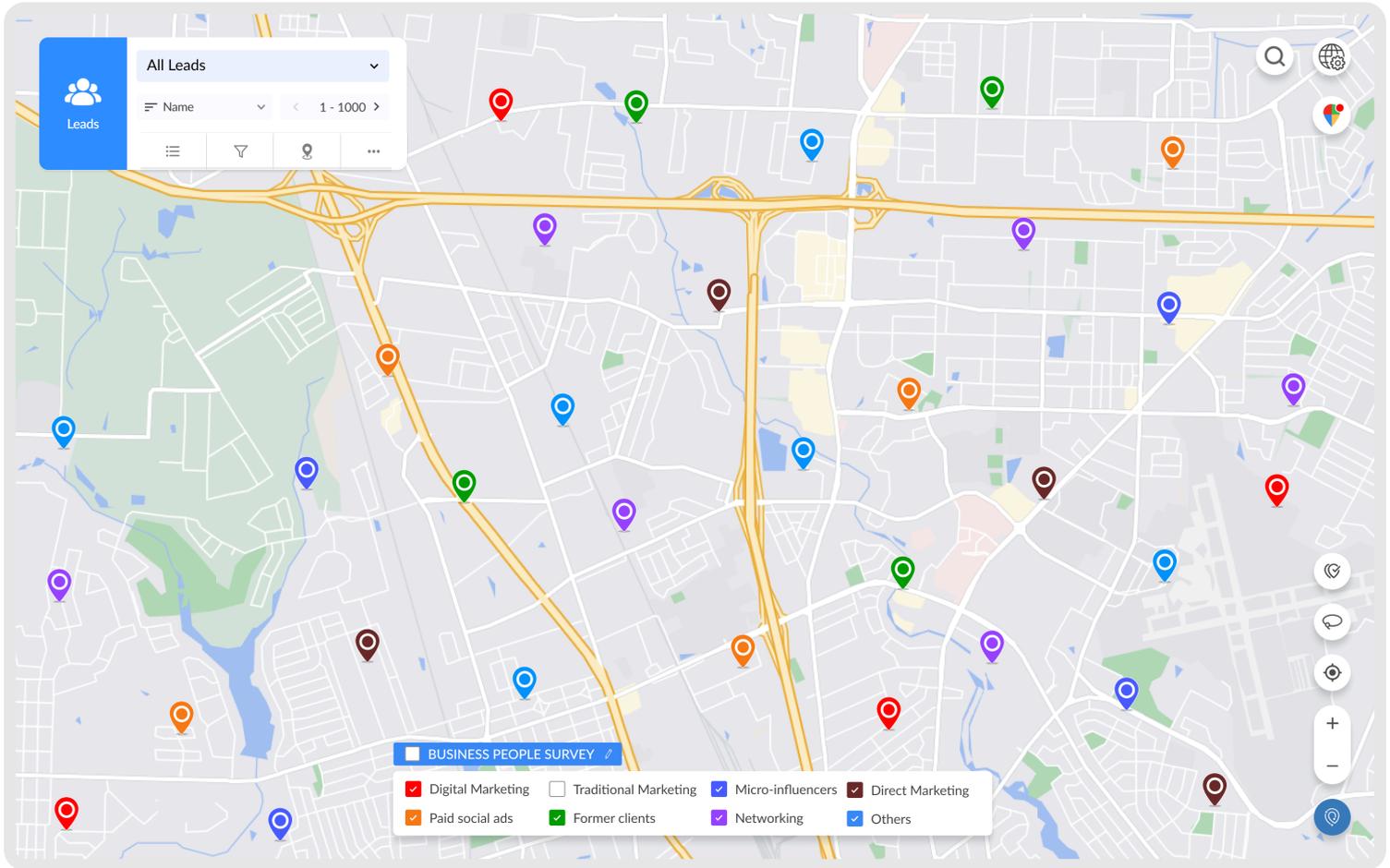
Viewing Color Views

1. Click on the color view icon to open the color view menu.
2. Select from the list provided in the table below:



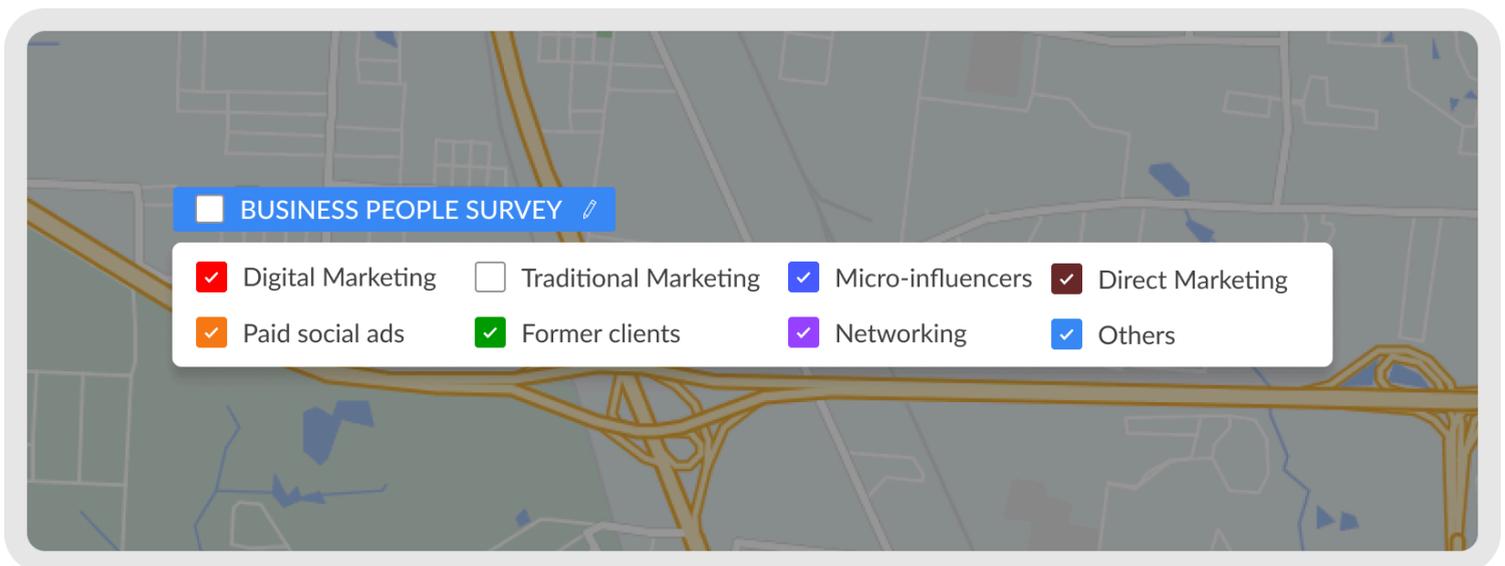
Category Name	Color View Contained
Created By Me	Color views you created
Public Color View	Color views shared with everyone
Other User's Color View	Color views created by other users (viewable only by Admins)

3. Once selected, all the pins on the map will be color coded according to the chosen color view.

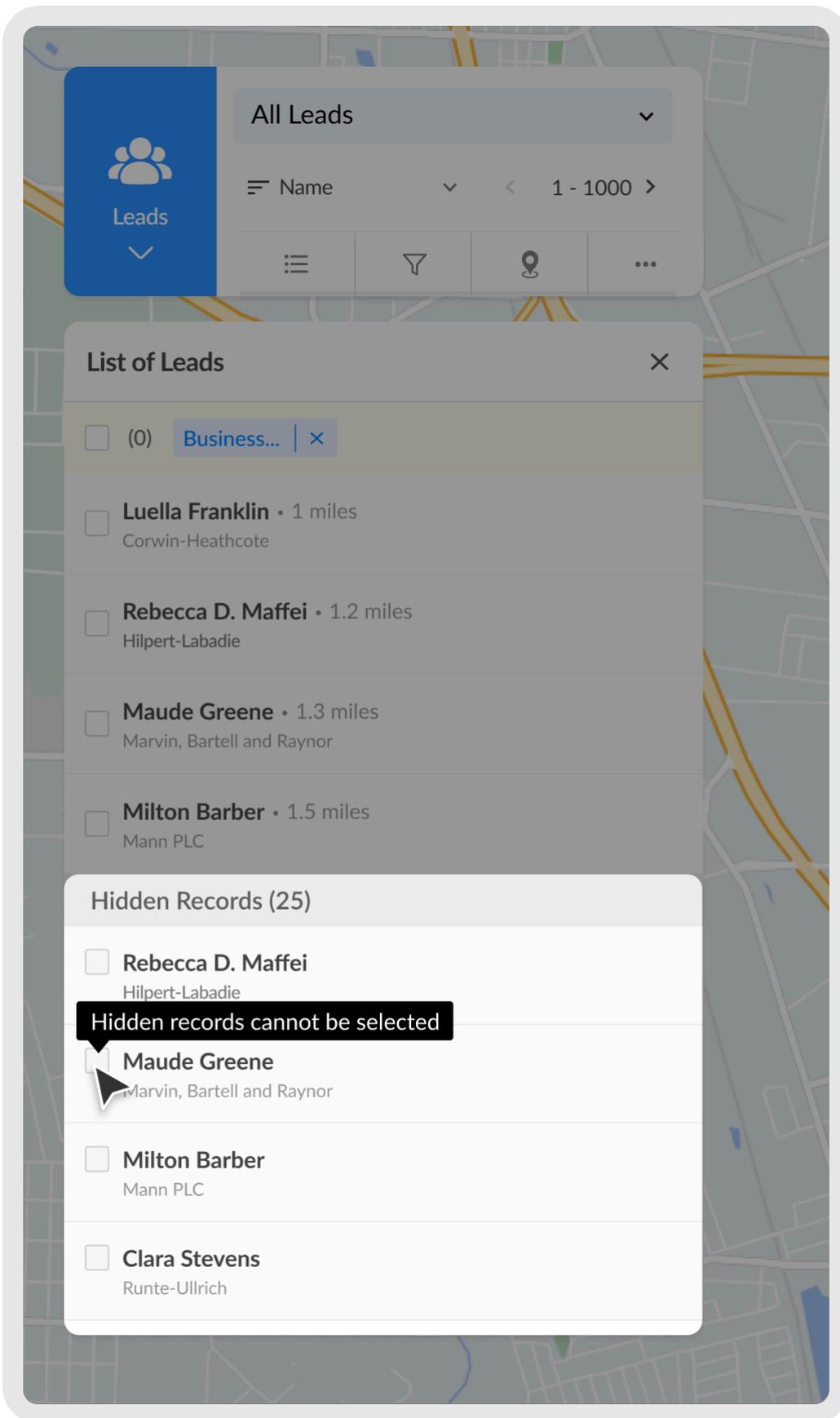


4. The color view legend will be displayed at the bottom of the screen, allowing you to choose which criteria should be visualized on the map.

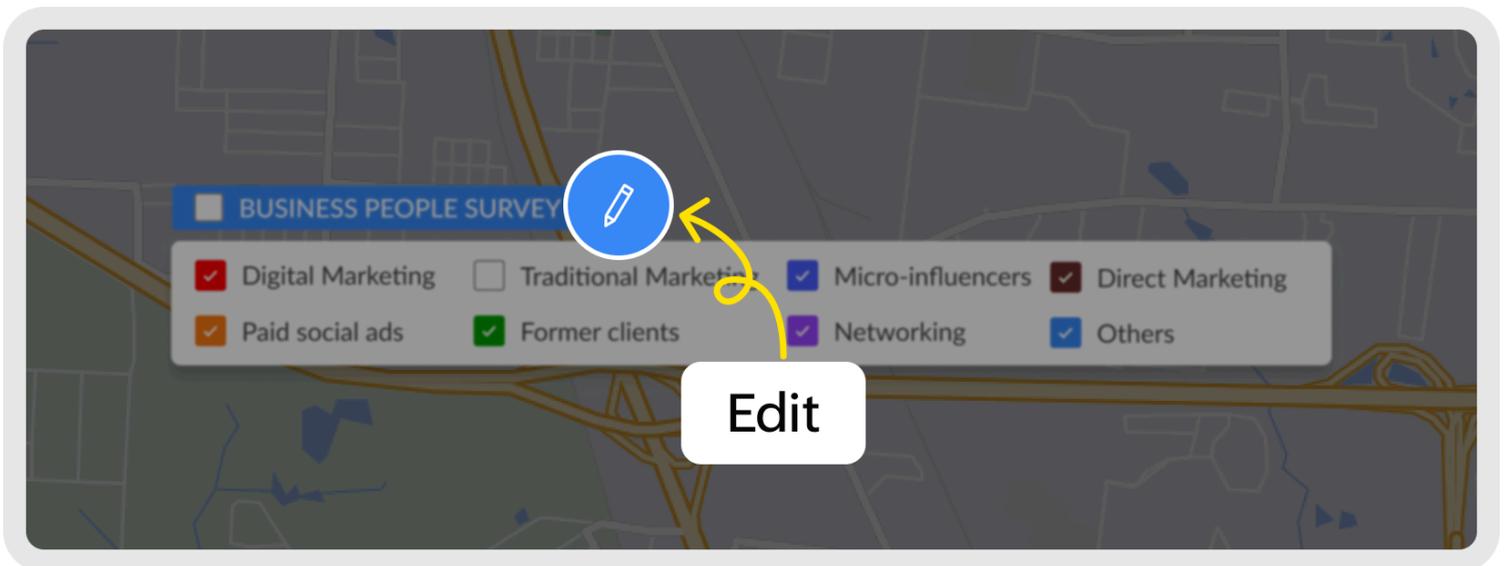
a. You can select the criteria you want to view by checking the checkbox beside it. These pins will be hidden in the map and list view.



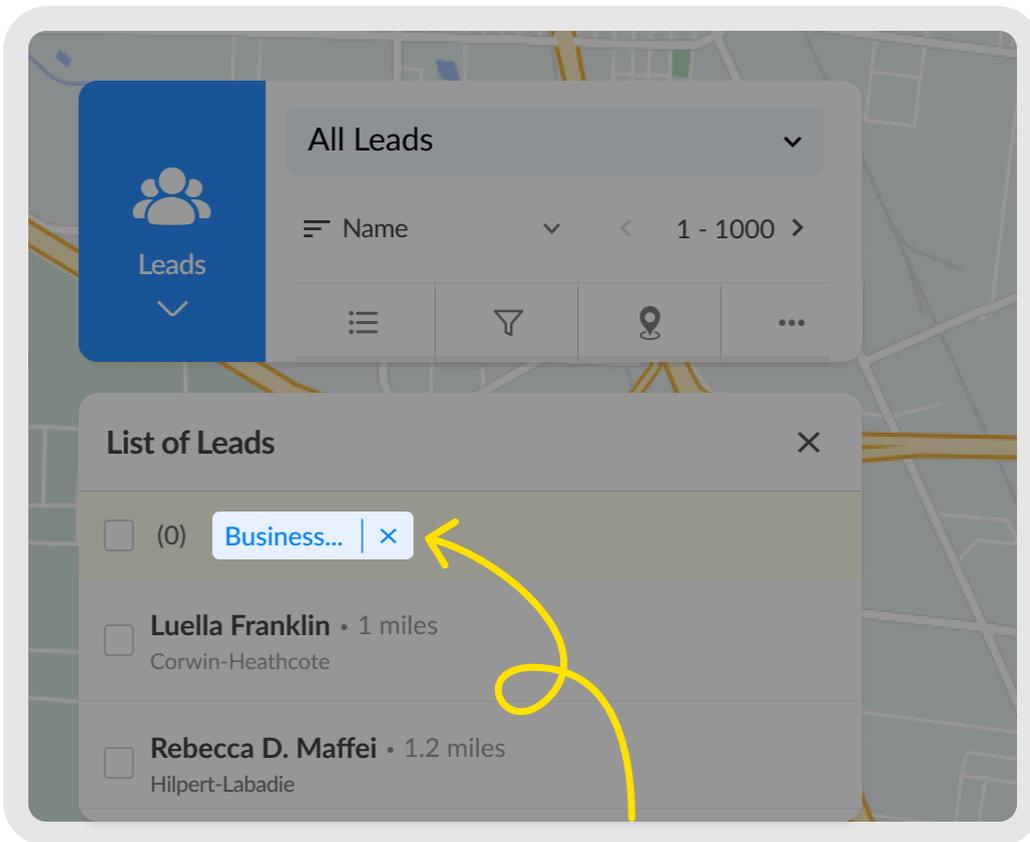
Note: Hidden records cannot be selected.



5. To edit the color view, click on the edit icon above the color view legend, this will open the color wizard.

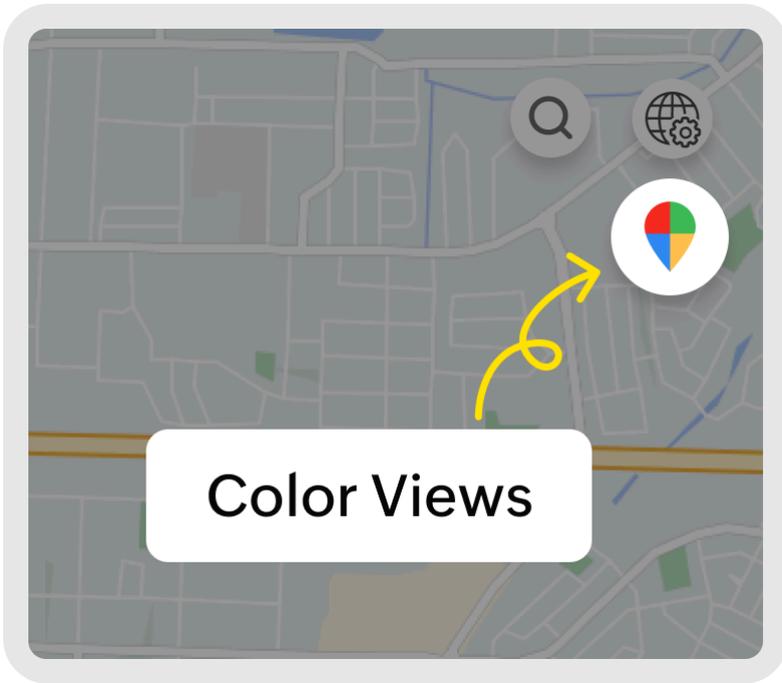


6. To remove the applied color view, click on the close icon beside the color view name located at the top of the list view.

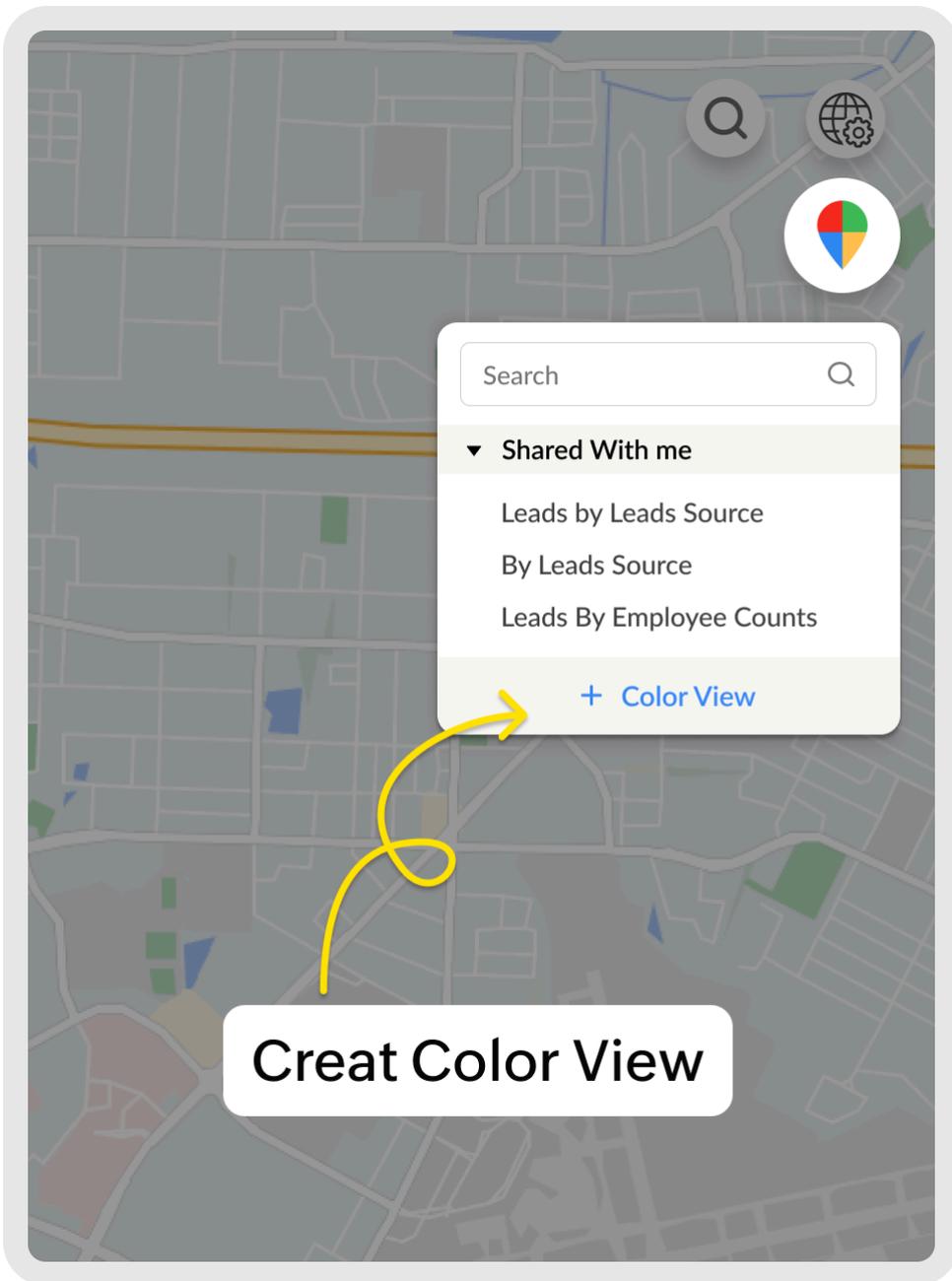


Creating a New Color View

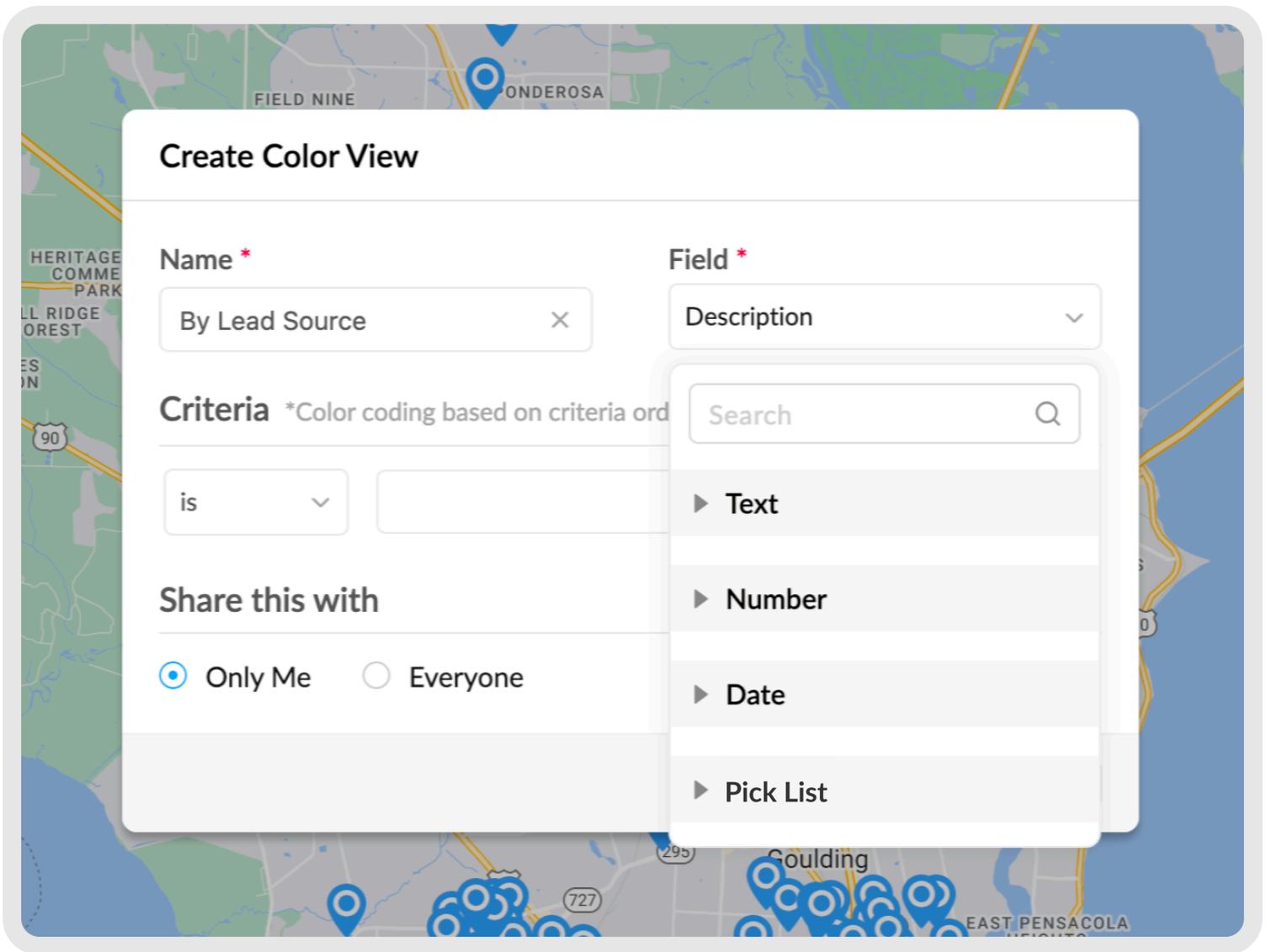
1. Click on the Color View icon in the top right corner.
2. Click on the "+ Color View" button.



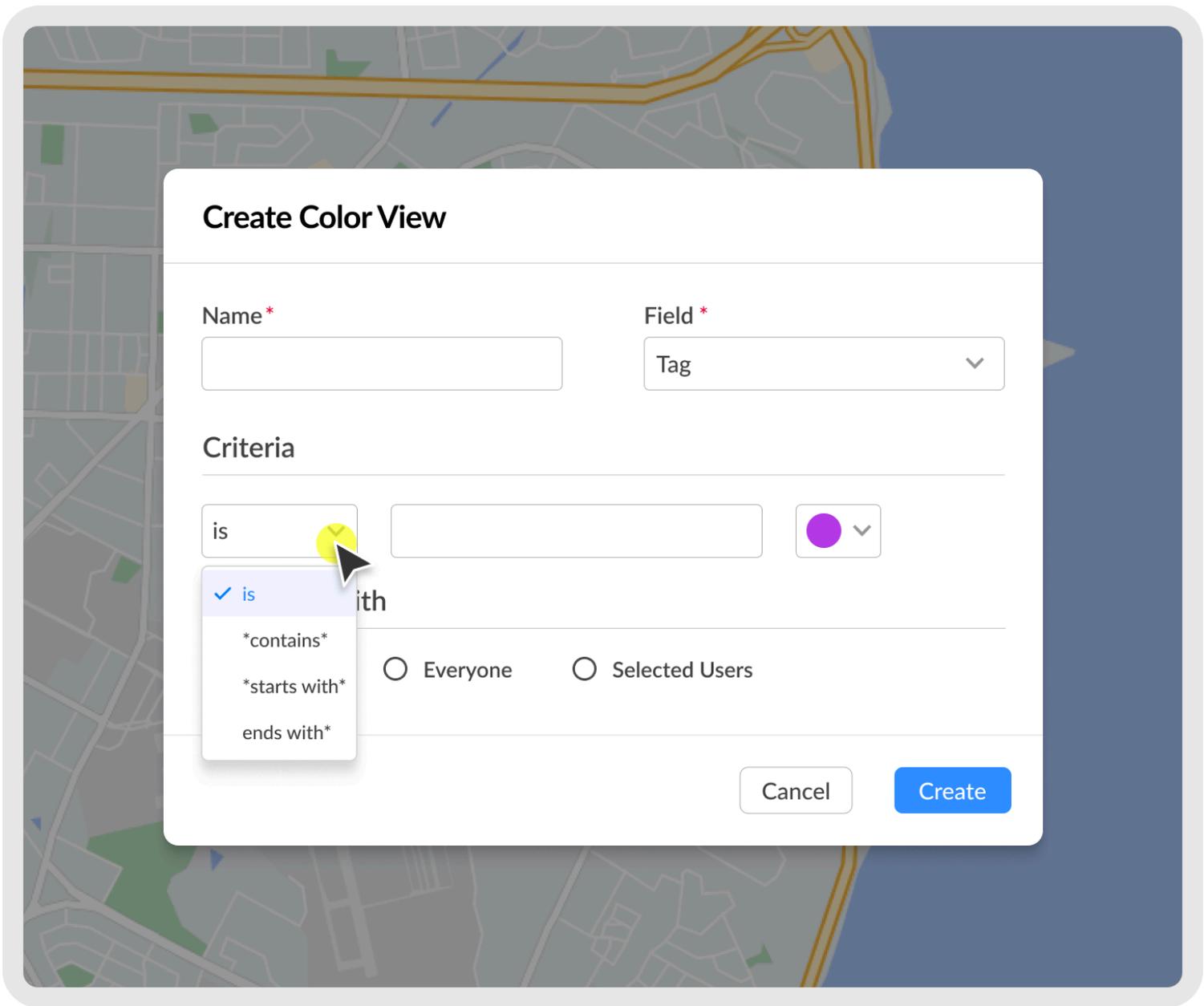
Color Views



Creat Color View



3. Enter a name for the color view.
4. Select the field you want to use for color coding the pins. These are the field types:
 - a. Text
 - b. Number
 - c. Date
 - d. Date/Time
 - e. Pick List



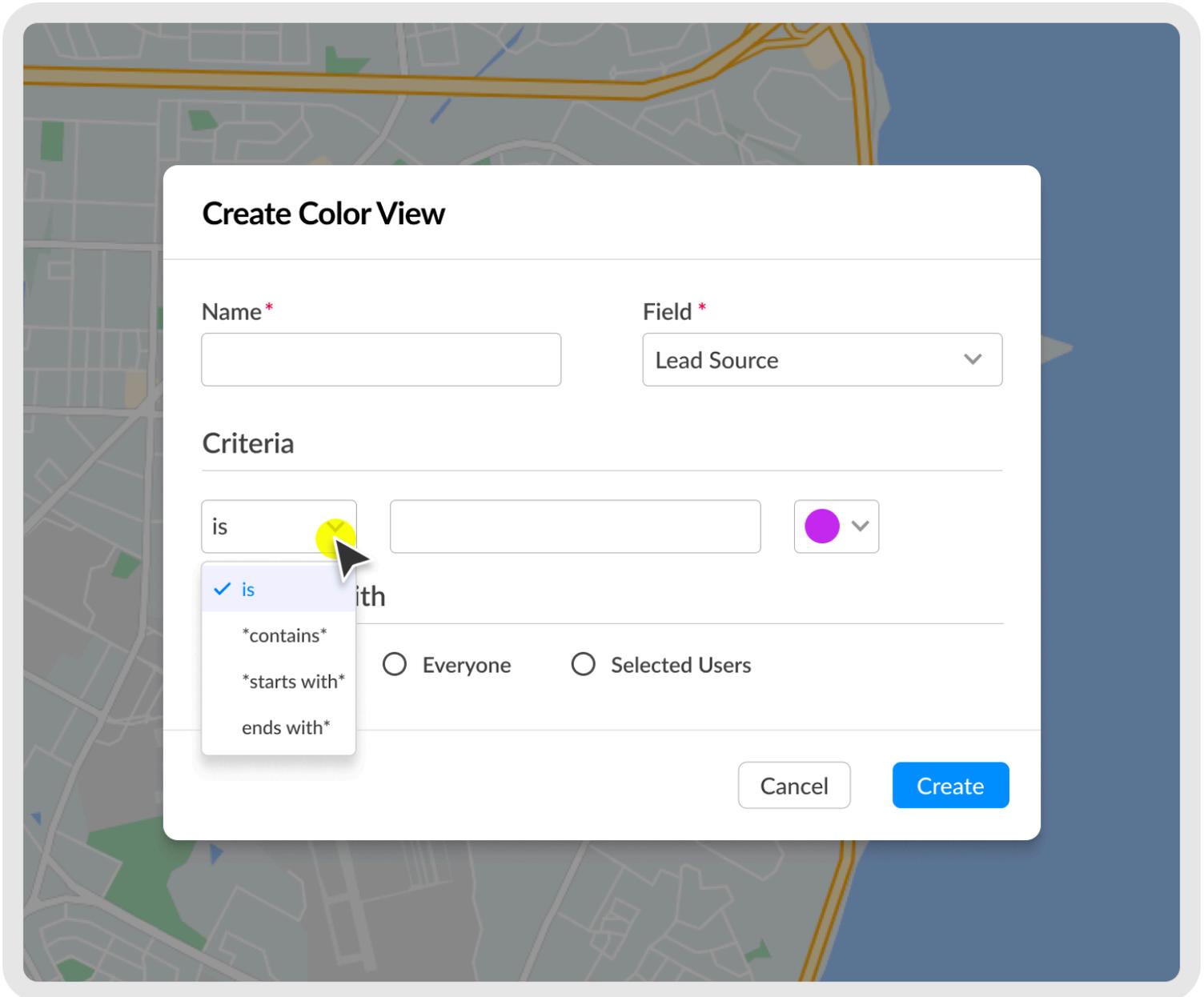
Adding Criteria

5. Choose the criteria based on which you want to compare. These are the comparators supported for the data type

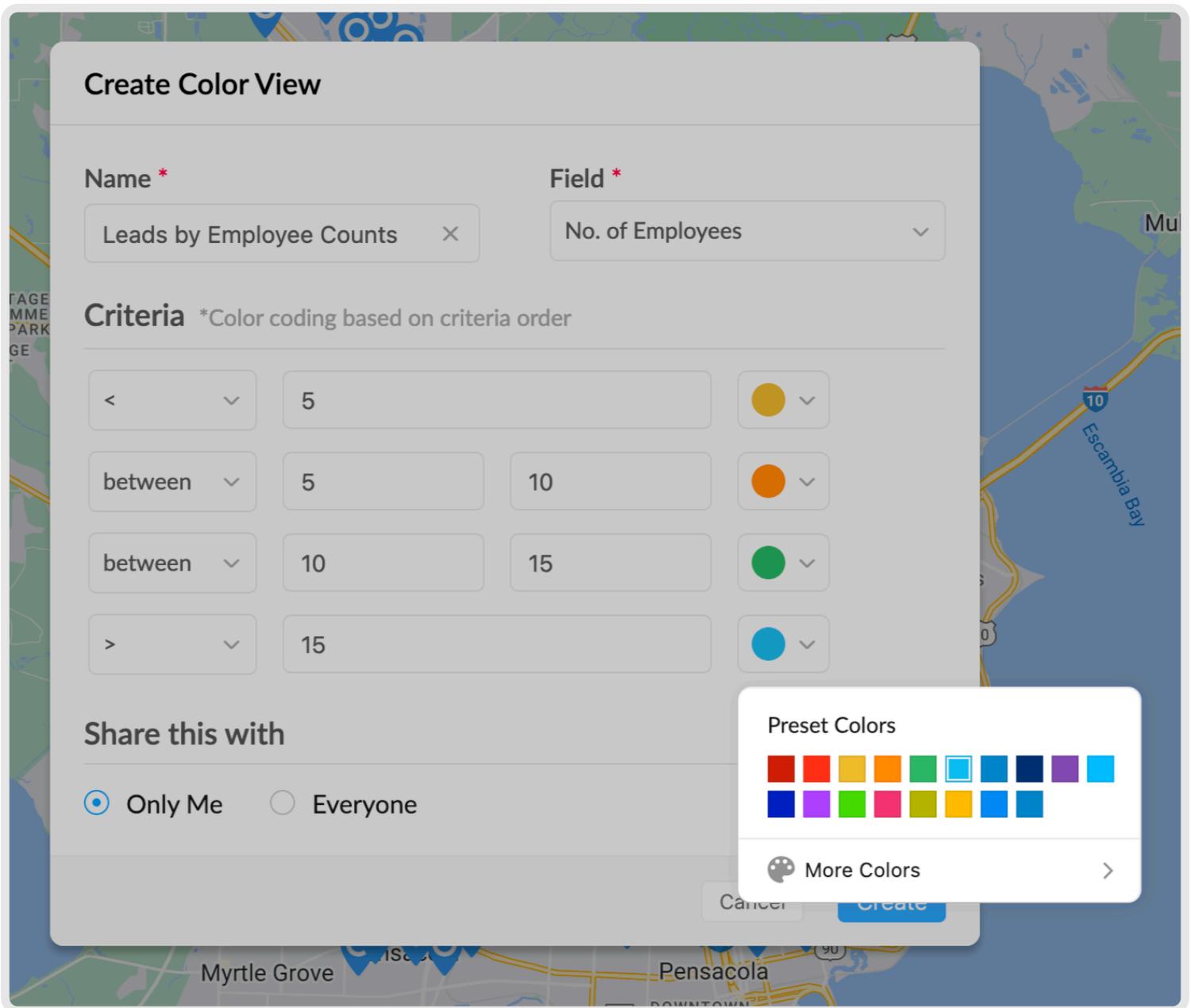
Criteria Components

Data Type	Comparators
Text	is, *contains*, *starts with and ends with*
Number	<, >, = and between
Date, Date and Time	<, >, =, between, is after, is before, Today, Yesterday, Tomorrow, Till Yesterday, Tomorrow Onwards, This Week, Last Week, Next Week, This Month, Last

	Month, Next Month, This Year, Last Year and Next Year
Pick List	is
Currency	<, >, = and between
User	is

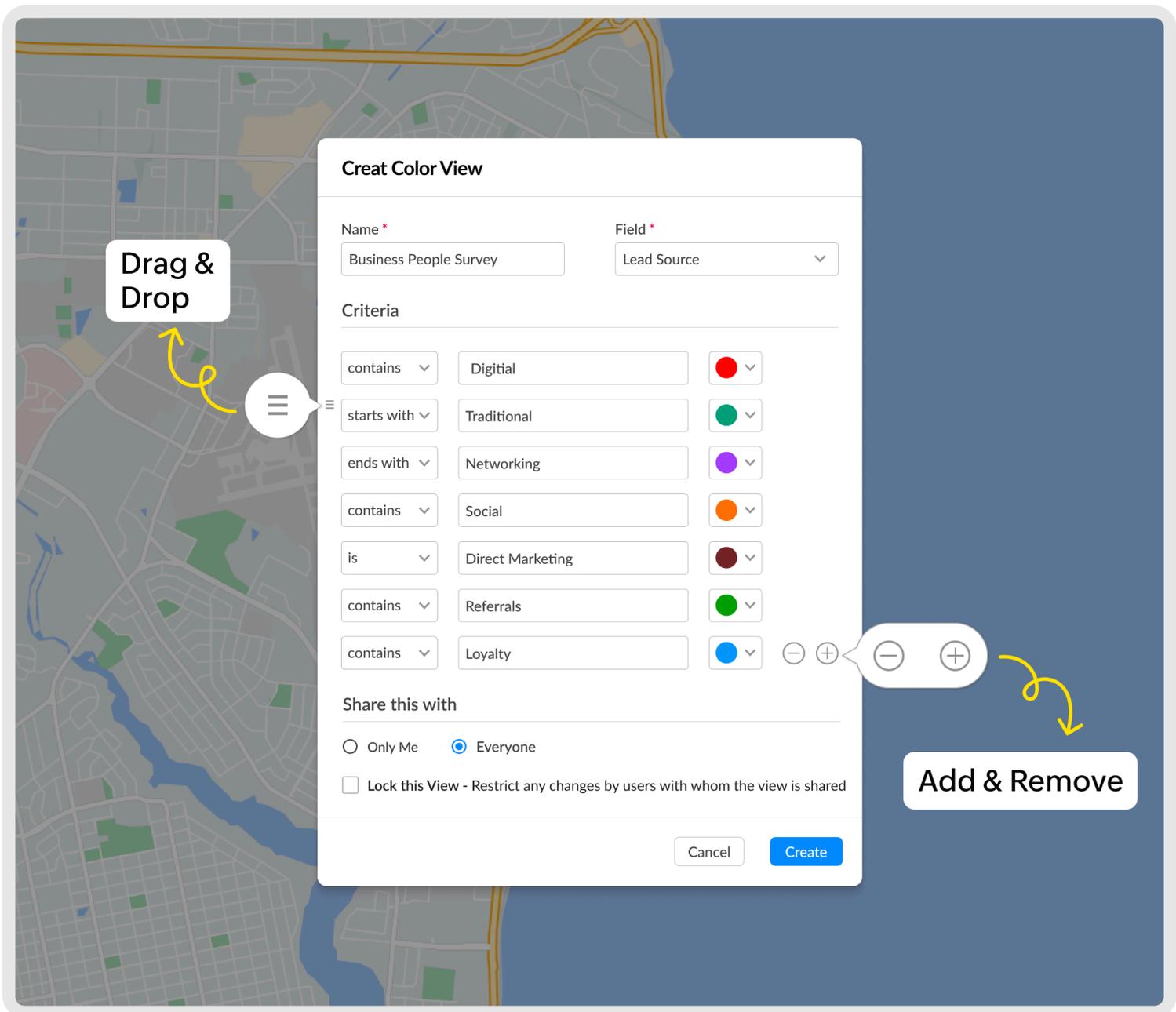


5. Enter the criteria value.



6. Select the color for the criteria:

- a. A color will be automatically selected for each criteria.
- b. Click the colors drop down and select from the preset colors or the color wheel, if you user to select colors manually.



7. Add or remove criteria, using the add/remove options available on the right edge of the criteria.
8. Change the order (if needed), using the drag and drop option available on the left edge of the criteria.

 Criteria will be applied based on the order of the criteria

9. Share the color view, with "only me" or "everyone".
 - a. When "everyone" is selected, lock this view so that no one apart from you can edit this color view.
10. Click "Create" to complete creating the color view.

