



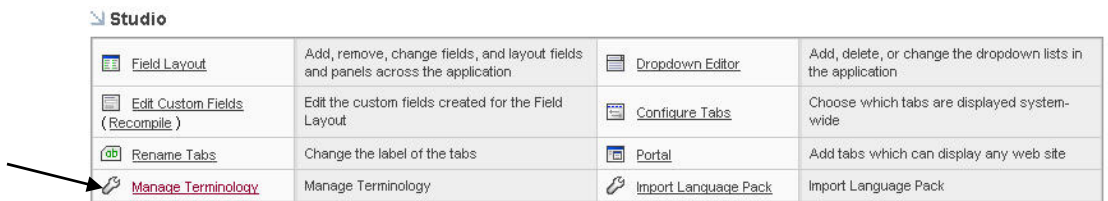
The Right Technology, the Right Results

CRM – Changing Existing Label Names

To Change Existing Label Names within Modules:

For documentation purposes, we will change the label name **Expected Close Date** in the Opportunity Module. You would follow these procedures to change any preset label name currently displayed within a module.

1. **Log into the CRM** as an Administrator.
2. **Click Admin** located in upper right corner of CRM screen.
3. **Click Manage Terminology** in the Studio section.

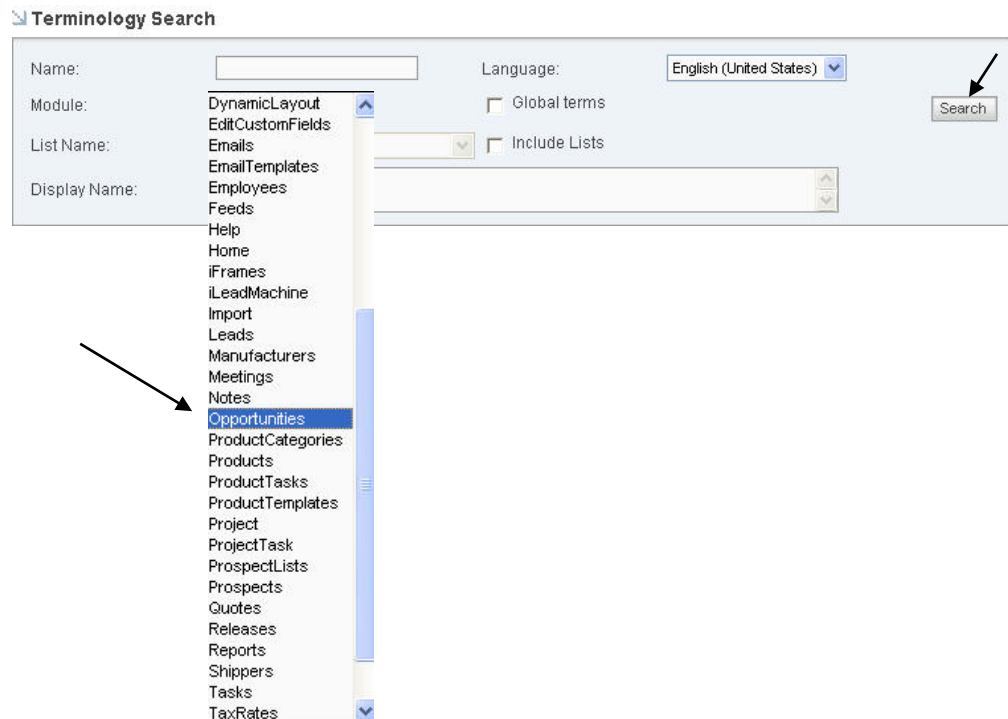


4. The Terminology Search screen displays.

NOTE: It is recommended that you perform a search on the module you wish to change terminology first. Performing a search assists you in selecting the correct module and label.

5. **Select module** from drop down list in the Terminology Search Window.

NOTE: For documentation purposes, we selected Opportunities because the label we want to change owns real-estate in this module.



To Change Existing Label Names within Modules (Continued):

- 6. Click Search (refer to image on previous page.)
- 7.
- 8. Scroll down the Terminology List until you locate the label you want to change.
- 9. Click the Label in the Name column. For documentation purposes, we selected LBL_DATE_CLOSED.

NOTE: To ensure you select the correct label to change, look at the Display Name. This is

Terminology List

Module	Name	Language	List Name	List Order	Display Name	
Opportunities	Agent_c	en-US			Agent	del
Opportunities	db_amount	en-US			LBL_LIST_AMOUNT	del
Opportunities	db_date_closed	en-US			LBL_LIST_DATE_CLOSED	del
Opportunities	db_name	en-US			LBL_NAME	del
Opportunities	db_sales_stage	en-US			LBL_LIST_SALES_STAGE	del
Opportunities	ERR_DELETE_RECORD	en-US			A record number must be specified to delete the opportunity.	del
Opportunities	LBL_DATE_CLOSED	en-US			Expected Close Date:	del
Opportunities	LBL_DEFAULT_SUBPANEL_TITLE	en-US			Opportunities	del
Opportunities	LBL_DESCRIPTION	en-US			Description:	del

how the label is currently displayed in the Module.

- 10. A screen display showing the current label and shows the current Display Name.
- 11. Highlight the text in the Display Name.

Terminology: LBL_DATE_CLOSED

Save Cancel

Name: * LBL_DATE_CLOSED Language: * English (United States)

Module: Opportunities

List Name: --None-- List Order:

Display Name: **Expected Close Date:**

- 11. Press the Delete Key.

To Change Existing Label Names within Modules (Continued):

12. Enter a New Display Name. For documentation purposes, we entered **Next Step Start Date**:

13. Click Save.

Terminology: LBL_DATE_CLOSED Help Wiki

Save Cancel * Indicates required field

Name: * Language: *

Module:

List Name: List Order:

Display Name:

14. Click the **Module Tab** that contains the new label. For documentation purposes, we Clicked the Opportunities Tab.

15. Edit an Existing item or create a new item. Your new label will display.

Opportunities: New Plants Print Help Wiki

Edit Duplicate Delete

Opportunity Name: New Plants Amount: \$5,000.00

Account Name: A.A. Casey Co. Next Step Start Date: 05/11/2007

Type: Plants Next Step: Sent Proposal

Lead Source: Call-In Sales Stage: Initial Contact

Last Modified: 04/11/2007 4:25:18 PM by admin Team:

Probability (%): 10 Assigned to: csomers

Date Created: 04/11/2007 4:25:18 PM by admin

Description: Documentation Purposes

Agent Agent

New Label Next Step Start Date replaced Expected Close Date Label.