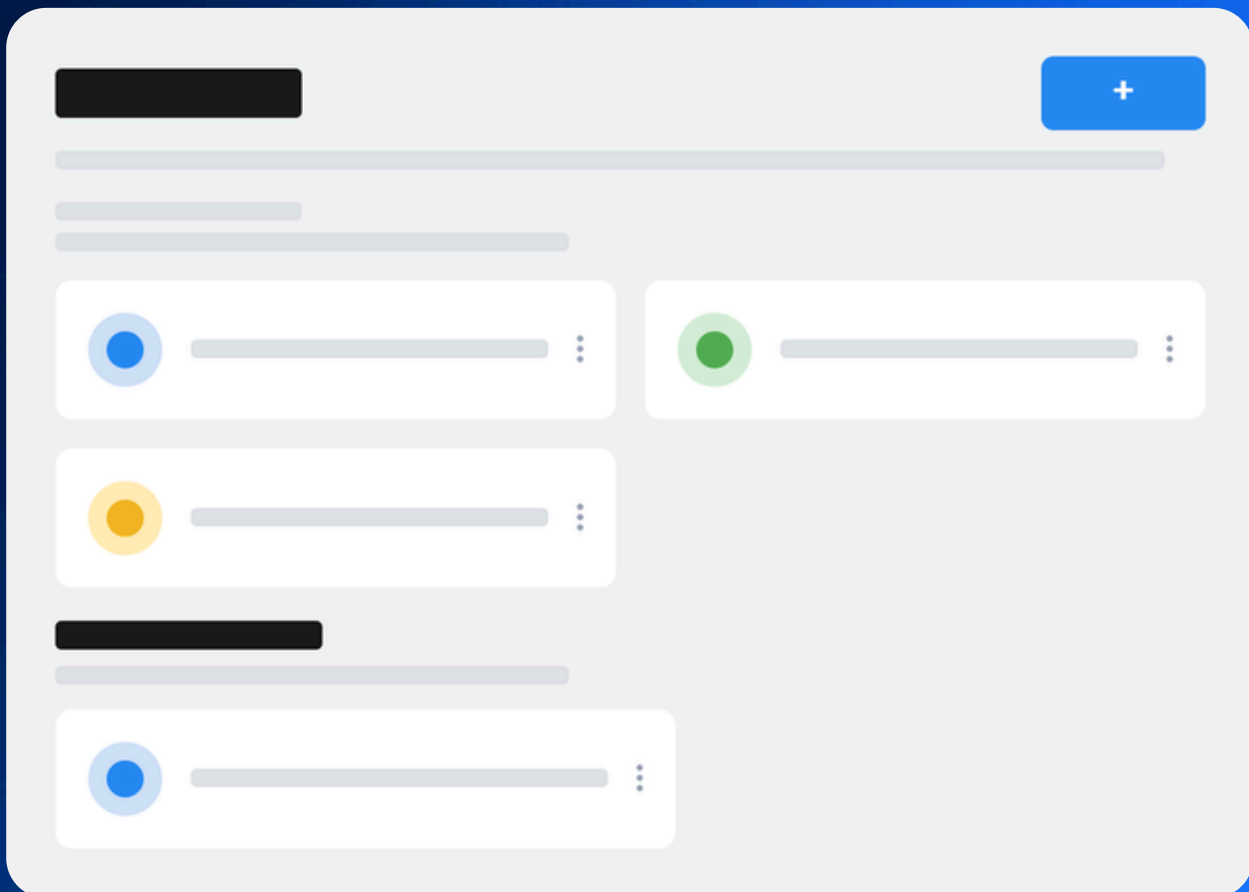


REFERENCE GUIDE

Objects Simplified

Contacts, companies, and custom objects in your software, explained in plain language.



A setup and reference companion for organizing your data the way your business actually works.

Contacts & Companies

What It Is

A contact always represents one person. A company represents a shared group, like a household, a couple, or a business. One company can be connected to one contact or to many contacts at the same time.

How It Works For Your Business

- Each person gets their own contact record with their own email, phone number, notes, and messages.
- The company record holds the shared details, like a wedding date, venue, package, budget, or household address.
- Think of it this way: the contact record focuses on the people, and the company record focuses on what they share.
- Example: a couple planning their wedding. Two contacts, one company that represents the couple.
- Example: a mortgage file. The borrower and co-borrower are separate contacts connected to the same company.
- You'll find the connection on any contact record under Associations, next to opportunities.

Why it matters: this structure keeps your data clean. Shared details live in one place instead of being copied onto every person's record.

Contacts & Companies – Tips & Guidelines

Tips

- Before you add anything new, ask: is this about a person, or about something people share?
- Store shared details on the company once, so you never update the same wedding date on two records.
- Keep person-specific details, like a cell number or personal email, on the contact.
- Open a contact and check Associations to see which company and opportunities they're tied to.

Guidelines

DO

- Give every person their own contact record
- Use a company for households, couples, and businesses
- Connect every related contact to the same company
- Put shared information on the company record

DON'T

- Put two people on one contact record
- Copy the same shared details onto every contact
- Use a company when the details really belong to one person
- Forget to connect a new contact to their existing company

Custom Objects

What It Is

Custom objects let you create brand new record types for the "things" your business tracks, like pets, properties, vehicles, projects, or policies. Each one gets its own records, its own fields, and its own connections to your contacts.

How It Works For Your Business

- Your software comes with standard objects: contacts, companies, and opportunities.
- A custom object is a record type you add yourself when those standard objects aren't enough.
- Organization at scale: you stop cramming unrelated details into contacts or opportunities.
- Real-world modeling: a pet or a property becomes its own record with its own details and history.
- Automation: custom object data can trigger workflows and power object-specific actions.
- Insights: filter, sort, and review object data with list views and advanced filters.

Where to find it: search for Objects. You'll see contacts, opportunities, and companies listed first, with any custom objects you create below them.

Custom Objects – Tips & Guidelines

Tips

- Plan before you build. Write down the objects your business actually needs, then create only those.
- Your account can only hold a limited number of custom objects, so don't go object crazy.
- Build objects around your industry: pets for a vet clinic, homes for a property manager, vehicles for a car lot.
- Get comfortable with custom fields first. Custom objects build directly on that skill.

Guidelines

DO

- Map your real-world process before creating anything
- Create objects that match your business and your industry
- Give each object a clear singular and plural name
- Connect every custom object back to a contact

DON'T

- Create an object for every idea that comes up
- Rebuild something a standard object already handles
- Skip the planning step and fix it later
- Leave a custom object floating with no connections

When To Use Custom Objects

Custom objects are powerful, but they're not always the right answer. Use this page as your quick gut check before you create one.

USE A CUSTOM OBJECT WHEN

- The data describes a "thing," not a person or an organization
- You need consistent, repeatable records of the same kind of thing
- One contact may have several of these things, like two pets or three properties
- You want to map relationships across several record types
- You want automations or reports built around that thing

STICK WITH STANDARD OBJECTS WHEN

- Contacts, companies, or opportunities already do the job
- You need contact features like bulk email, marketing campaigns, or messaging
- You'd be duplicating an idea that already lives in a standard object
- You're really just trying to group or label records
- You're tracking notes, tasks, or activities

Just need to group or segment? Use smart lists and tags on your standard objects instead. A custom object that mirrors an existing object causes confusion and inconsistent data.

The Quick Test

Is it a thing, not a person? Will I have many of them? Does it need its own details? If all three answers are yes, a custom object is probably the right fit.

Common Examples

Good fits for a custom object, and what each one would track.

Pets

Vet clinics and pet sitters. Breed, male or female, spayed or neutered, vaccination dates. Linked to the owner.

Homes & Properties

Real estate and property managers. Price, status, location, bedrooms, listing number. Linked to buyers, renters, or owners.

Vehicles

Car lots and auto services. Make, model, year, status. Linked to interested buyers and sellers.

Projects

Agencies and service providers. Scope, stage, deadline, deliverables. Linked to the client contact.

Policies

Insurance and finance. Policy type, renewal date, coverage. Linked to the policy holder.

Loan Files

Mortgage and lending. Loan details stored once, linked to both the borrower and co-borrower.

Not A Good Fit

Event Attendees

Attendees are people. Use contacts, plus tags or smart lists to group them.

Notes, Tasks & Activities

These already live on the contact. A custom object here only adds complexity.

Remember: you're not calling the pet, the property, or the vehicle. You're calling the contact. Custom objects hold the details, and the contact is always the person you communicate with.

Creating A Custom Object

What It Is

Creating a custom object sets up the new record type itself: what it's called, what its main identifying field is, and how it looks in your menu. It only takes a minute once you've planned it.

How To Set It Up

- Search for Objects and click the button to add a custom object.
- Singular name: what you call one record, like Pet, Property, or Vehicle.
- Plural name: what you call the group, like Pets, Properties, or Vehicles.
- Primary field: the main identifier for each record, like the pet name, the property address, or the borrower name.
- Mark the primary field as unique if you want to prevent duplicate records during imports, workflows, and form submissions.
- Pick an icon and add a short description so your team knows what the object is for.

Once it's created, your new object shows up on the Objects page, and you can search for it by name to start adding records.

Creating A Custom Object – Tips & Guidelines

Tips

- Choose a primary field people will actually recognize at a glance, like a name or an address.
- Decide on uniqueness up front. You can switch a unique field to non-unique later, but not the other way around.
- Keep your object simple but effective. You can always add more fields as you learn what you need.
- Use the three dots next to any object to edit it, add custom fields, or delete it.

Guidelines

DO

- Use clear, everyday names for singular and plural
- Pick a primary field that identifies each record
- Mark the primary field unique when duplicates would hurt
- Add a description your whole team will understand

DON'T

- Use internal jargon or abbreviations as object names
- Make the primary field something vague like "Item 1"
- Skip uniqueness and then fight duplicate records later
- Delete an object without checking what's connected to it

Custom Fields For Objects

What It Is

Custom fields are the details you track on each record of your object. A pet object might have fields for breed, sex, and vaccination dates. Fields are organized into groups (folders) so records stay easy to read.

How It Works For Your Business

- Add fields from the three dots next to your object, or from your custom fields area.
- Pick the field type that fits the data: single line text, multi-line text, number, phone, dropdown, and more.
- When you create the field, select the right object. A pet field belongs on the Pet object, not on contacts.
- Save each field into a group, like Pet Info, so related fields stay together on the record.
- Company-level details, like an EIN number, belong on the company object instead.

Plan your fields before you build: list every detail you want on the record, pick the field type for each, and decide which group it belongs in.

Custom Fields – Tips & Guidelines

Tips

- Dropdowns keep data clean. Use one when there's a set list of answers, like male or female.
- Always double-check the object selected before you save a new field.
- Name groups after what they hold, like Pet Info or Property Details.
- Turn on "hide empty fields and folders" on a record when you want a cleaner view.

Guidelines

DO

- Match each field type to the kind of data it holds
- Attach every field to the correct object
- Organize fields into clearly named groups
- Keep the field list focused on what you'll actually use

DON'T

- Use free text when a dropdown would keep answers consistent
- Save an object field onto the contact object by mistake
- Dump every field into one giant ungrouped list
- Add fields "just in case" that nobody will fill in

Associations & Relationships

What It Is

An association is the connection between two records, like a pet and its owner. Associations identify and track how your objects relate to contacts, companies, opportunities, and each other.

Labels

- Single label: one name describes the connection both ways, like Owner for a pet and its owner.
- Pair of labels: each side gets its own name, like Borrower and Co-Borrower on a loan.

Relationship Types

One-to-One

One record links to exactly one other record.
Example: one pet linked to one owner, or one car linked to one contact.

One-to-Many

One record links to several others. Example: one property linked to many interested buyers or renters.

Many-to-Many

Several records link to several others. Example: many cars linked to many buyers and sellers at a dealership.

One-to-N (Custom Limit)

You set the maximum. Example: one car can be listed for sale by up to five contacts labeled Sellers.

Where to set it up: search for Objects, open your object, and create an association. Choose a single label or a pair, then configure the relationship. The preview shows exactly how many records can connect on each side.

Associations – Tips & Guidelines

Tips

- Pick the label from the contact's point of view: what is this person to the object? Owner, Buyer, Seller, Borrower.
- Start with the simplest relationship that fits. Most pet and owner setups are one-to-one.
- Read the preview before you save. It spells out how many records can connect on each side.
- You can edit an association anytime from the three dots, so update it as your process grows.

Guidelines

DO

- Create an association for every custom object you build
- Use labels your team already says out loud
- Choose the relationship type that matches real life
- Relate objects to contacts, opportunities, or companies as needed

DON'T

- Build an object and forget to associate it
- Pick many-to-many when one-to-one is what really happens
- Use vague labels like "Related" or "Linked"
- Guess at limits without checking the relationship preview

Adding & Linking Records

What It Is

A record is one entry inside your object, like Luna inside your Pets object. Once your object, fields, and association are set up, records are where the day-to-day work happens.

How It Works For Your Business

- Search for your object by name, then add a record. Start with the primary field, like the pet's name.
- Open the record to fill in your custom fields, like sex, spayed or neutered, and last date of shots.
- Link the record to a contact from inside the record by searching for the contact.
- Or work from the contact side: open the contact, go to Associations, and link an existing record or create a new one.
- Once linked, the association label shows who the contact is to that record, like Owner.

Adding a record doesn't connect it to anyone yet. Always finish by linking it to the right contact, opportunity, or company.

Records – Tips & Guidelines

Tips

- Refresh the page after creating a new object if it doesn't show up in search right away.
- Link from whichever side you're already working in. The connection shows up on both records.
- Fill in fields right away while you have the details in front of you.
- Use the record's followers when teammates need to stay in the loop.

Guidelines

DO

- Link every new record to its contact right away
- Fill in the custom fields you planned for
- Check the contact's Associations to confirm the link
- Keep record names consistent across your team

DON'T

- Leave records sitting unlinked
- Create a duplicate record instead of linking an existing one
- Store person details on the object record instead of the contact
- Use a record as a place for notes or tasks

Key Terms Glossary

Object

A type of record in your software, like contacts, companies, or pets.

Standard Object

Built-in record types: contacts, companies, and opportunities.

Custom Object

A record type you create for the things your business tracks.

Contact

A record that always represents one person.

Company

A record for a shared group, like a household, couple, or business.

Record

One entry inside an object, like Luna inside Pets.

Primary Field

The main identifier for each record, like a name or address.

Unique Field

A field that blocks duplicate values during imports, forms, and workflows.

Custom Field

A detail you track on a record, like breed or vaccination date.

Group (Folder)

A named set of related custom fields, like Pet Info.

Association

The connection between two records, like a pet and its owner.

Association Label

The name for a connection, like Owner, Buyer, or Co-Borrower.

One-to-One / One-to-Many

One record links to one other record, or to several.

Many-to-Many / One-to-N

Many records link to many, or you set a custom limit.

Smart List

A saved, filtered view used to segment standard records.

Tag

A label on a contact used for sorting, filtering, and marketing.

Your Setup Path & Getting Help

1

Plan It

List the things your business tracks and decide which truly need their own object.

2

Create The Object

Search for Objects. Add the names, primary field, icon, and description.

3

Add Custom Fields

Pick the right field types, attach them to the object, and save them into a group.

4

Create The Association

Choose your labels and the relationship type that matches real life.

5

Add & Link Records

Add your first record and link it to the right contact.

6

Put It To Work

Use views, filters, forms, and workflows built around your new object.

Just remember: search for Objects, add your new object. Then relate it to the contact, opportunity, or company it belongs to.

Getting Help

- Brand new to your software? Get comfortable with custom fields first, then come back to custom objects.
- Keep this guide handy as you plan. It's written to stay useful no matter how many objects you build.
- If something doesn't look the way you expect, reach out to your support team for help.