Configuration & Customization

System settings, the navigation menu, and the sandbox-first process for configuration changes.

System Settings & the Navigation Menu

System Settings

Administration → **Settings** holds system-wide options. The ones you might reasonably touch:

- **Application name, time zone, date & number formats, week start, default currency, language** — locale and cosmetic defaults.
- **Outbound email** basics — covered in Chapter 5 — Integrations.

> Most settings apply immediately and are safe to adjust. If a setting mentions caching, performance, or "developer" options and you're unsure, **leave it** — and Sandbox-test anything you're uncertain about.

The Navigation Menu (Tab List)

The left sidebar is the **Tab List**: Administration → **User Interface** → **Tab List**.

- Add or remove tabs, **drag to reorder**, and group them with dividers.
- This is where the **Documentation** tab lives — a URL tab pointing at the docs site (see The Documentation Site).
- To add an external link: **Add → URL**, set the label and URL, drag into place, **Save**. (CBM's external tabs are set to open in a new browser tab via a small customization.)

> The Tab List you edit here is the **default for everyone**. Individual users can further customize their own tabs in their preferences.

Dashboards

- The dashboard is the landing page of tiles ("dashlets"). You can set a sensible default layout; users can rearrange their own.

Wording (Label Manager)

- Administration → **Label Manager** changes the words shown in the interface without changing the underlying configuration. Use it sparingly and Sandbox-test — a relabel that drifts from training or these guides confuses users.

What does *not* belong here

Changing **fields, layouts, or record types** is **not** done casually in this area — it follows the sandbox-first process in Making Configuration Changes.

Making Configuration Changes

Two kinds of change

- **Data** — adding records, fixing values, importing. Everyday work; see Chapter 4 — Managing Data.
- **Configuration / structure** — new fields, changed layouts, new record types, dropdown options, validation, relationships. This follows a defined process.

Why configuration is special

The CBM CRM's structure is **defined as versioned configuration files** and applied with CBM's implementation tooling, so the system can be rebuilt or moved reliably and every change is tracked. If you hand-edit structure directly in Production (via Entity Manager or Layout Manager), those changes:

- **aren't recorded** in the configuration source, so they can be lost in a rebuild or upgrade, and
- **drift** between Sandbox and Production.

The sandbox-first process

1. **Describe the change** — what field/layout/record type, on which record, and why.
2. **Make it in the Sandbox first** (via the configuration files / implementation tool) and verify it.
3. **Review** with whoever requested it.
4. **Apply to Production** the same way, once confirmed.

> This is the **golden rule** in its most important form. Structural changes affect everyone at once and are the easiest way to break things — never make them straight in Production.

Safe to do in the interface

- Adding and editing **records** (data) — Chapter 4.
- **Settings**, the **Tab List**, **dashboards**, **labels** — System Settings & the Navigation Menu.
- **Users, roles, teams** — Chapter 2.

Goes through the process (don't do casually in Production)

- New or changed **fields**
- New **record types / entities**
- **Dropdown options**, **validation rules**, **relationships** between records

Who to involve

Configuration changes are made with the implementation tooling and, where needed, the CBM implementation team. If you're unsure whether something is "just data" or "configuration," **treat it as configuration** and check — see Getting Help and Next Steps.

List Sort Order & Search Fields

For each type of record (Contact, Account, Mentor Profile, and so on), you can set **how its list is ordered by default** and **what its search box looks at**. These are simple administrator settings — no coding involved, and they never change any of your data.

What you can set

- **Order By** — the field the list is sorted by when you open it.
- **Sort Direction** — *Ascending* (A→Z, oldest first) or *Descending* (Z→A, newest first).
- **Text Filter Fields** — the fields the quick-search box searches when someone types in it.
- **Full-Text Search** — the deeper "search everything" mode, on or off.
- **Full-Text Search Min Length** — *(optional)* how many letters someone must type before full-text search starts.

How to change them

1. Sign in to EspoCRM as an **administrator**.
2. Open the **Administration** menu (top-right).
3. Click **Entity Manager**.
4. Click the record type you want to change (for example, *Contact*).
5. Click **Edit**.
6. Set the boxes you want:
   - **Order By** — choose the field to sort by.
   - **Sort Direction** — *Ascending* or *Descending*.
   - **Text Filter Fields** — choose the fields the search box should search.
   - **Full-Text Search** — tick to turn it on.
   - **Full-Text Search Min Length** — leave blank, or enter a number.
7. Click **Save**.
8. If you are prompted, go to **Administration → Rebuild** to finish applying the change.

How to check it worked

Open that record type's list from the navigation menu. It should now be sorted the way you chose, and typing in the search box should look at the fields you picked.

Good to know

- These settings only affect **ordering and searching** — no records are changed.
- If you are not sure, leave a box at its default.
- If your CRM is maintained through the **CRM Builder** tool, these same five settings can be set there and published to EspoCRM automatically — check with whoever maintains the CRM.