Introduction to Records

The articles in this document are an excerpt from a larger section of an online help system that oriented users to the platform's data structure. It introduced relatively complex concepts so that all users could understand how the records they created fit into the larger data structure.

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Section Title: Overview of the Platform's Data Structure

About the Data Structure

Although the platform is highly configurable, there is an underlying data structure that uses common terminology and remains constant for all customers. This article explains, at a high level, the four layers used to describe how data is structured in the platform.
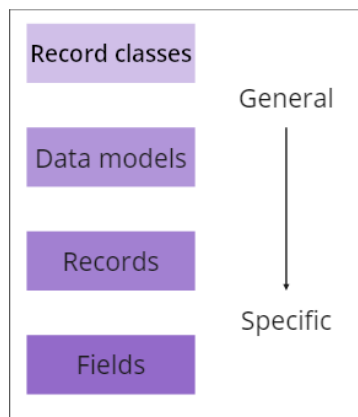
[Alt Text: The four layers for the platform's data structure, ordered from the more general (record classes and data models) to the more specific (records and fields).]

The following articles contain more detailed information about each layer.

Record Classes

When your organization implemented the platform, it identified the different types of information it wanted to capture and manage. Each separate kind of information is represented in the platform as a record class.

> A *record class* is a set of configurations that determines the identity, structure, and capabilities of a single kind of record.

Any record class your organization creates in the platform falls into one of the following four record classes or group of record classes:

- The individual record class focuses on separate people. For example, John Smith, Li Feng, and Mansoor Kahn could be people represented by three separate person records in your platform.

- The company record class focuses on organizations. Talia, Inc., The Star Group, and Manta LLC could be three example companies represented by company records in your platform.
- Entity records is a group of record classes that focus on business activities. Your platform contains at least one of these record classes and may include more, depending on the number of business activities your organization manages in the platform. "Job" and "event" are two example entity record classes. Records created from the job record class might include Sales Director, Office Manager, or Accountant, and records created from the event record class might include 2025 Harvard Job Fair, Open House, or Industry Conference. (Entity record classes and the records created from them are discussed in detail in the About Entity Records article.)
- Fusion record classes focus on the relationship between an individual record and an entity record of any class. If your organization uses fusion record classes, your platform may contain multiple. For example, a record created from a fusion record class called "application" would connect an individual with a job, such as Mansoor Kahn with the Accountant position. Or, a record created from a fusion record class called "registration" would associate an individual with an event, such as John Smith with the open house. (Fusion record classes and the records created from them are discussed in detail in About Fusion Records.)
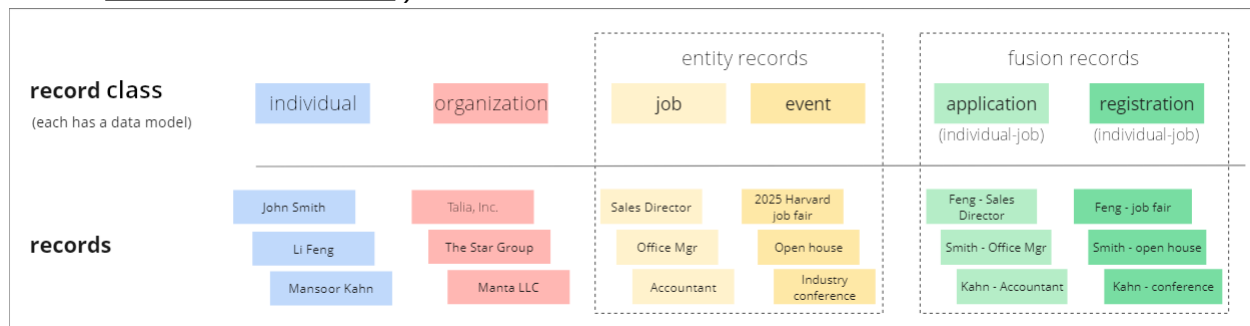
When you see the term "record class" in the platform or in help articles, it always refers to this higher, more general level of data definition. Admins are normally the only ones who interact directly with editing and managing record classes and their data models.

Data Models

A record class can have many settings that determine what information to capture and how that information is presented to users. A key characteristic that differentiates a record class from any other is its data model.

> A *data model* is a set of fields that determine what information will be captured for that record class.

The individual and organization record classes both have data models that include fields that focus on the characteristics of people or organizations, respectively.

Both entity and fusion records are categories that each can contain multiple individual record classes, each with its own unique data model. For example, an entity that your organization likely created is a job, whose data model focuses on information relevant to employment opportunities within the company. An example of a fusion record class is an individual-job record class called "application," whose data model focuses on capturing information relevant to a one-to-one relationship of a person applying for a position.

Records

A *record* is a unit that groups pieces of information about a specific individual, organization, process, or business activity. It is an unique occurrence of a record class.

Every time you create any new record, the system creates a unique page that shows a specific layout and fields based on the record class's data model. The fields can be empty, can contain preliminary details you may have entered when starting the process, can contain default values defined by your organization, or can contain information defined in a template.

Records for individuals, organizations, and any entity contain specific details about a single person, organization, or business activity. Fusion records are slightly different in that they contain details about a relationship between an individual's record and any kind of entity record.

Whenever you see the term "record" in the platform or in help articles, it always refers to the accumulated information about a single, unique thing. Users are the ones who interact with individual records the most. They can open records, view and edit their details, and perform many actions.

Fields

Fields are the most granular level for capturing information in the platform.

A *field* is an input area that captures a single piece of data. Fields are designed to work together to collect details that form an accurate representation of an individual or thing.

Some fields capture a single piece of information, such as a name, ID number, or date. Other fields can capture multiple pieces of related information, such as a location (address, city, state), a list of skills, or a table of educational degrees.

Section Title: Common Record Characteristics

About Common Record Characteristics

The information you input into any record and how that information is presented will differ depending on each record class and its data model. However, there are some characteristics that are common to all records.

For example, all records have a layout that defines how the information is organized. Also, they all have a header that shows basic details about the record and the tools available for manipulating the record. Panels, which group similar information together, are another common record characteristic.

This section of help discusses these common characteristics. For details about the specific information required by each record class, see the dedicated sections for individual records, organization records, entity records, and fusion records.

The Record Header

The record header appears at the top of all records. It contains basic information about the person or thing represented by the record as well as the action bar.

[image removed]

[Alt Text: A record header showing the two main parts. The action bar at the top contains tools for writing notes, uploading files, attaching forms, and more. The area below shows basic details such as the record's name, tags, and more.]

You can use the action bar to access tools for working with the record, such as uploading files, exporting information, and more. Below the action bar appears basic information such as the record's name, tags, and icons that allow quick access to integrations with third-party systems.

The options available in the action bar and the record's details visible below it vary by record class. See the dedicated articles for a tour of how the header appears for individual records, organization records, entity records, and fusion records.

Record Layout and Panels

Inside all records, information appears in panels, each of which contains similar or related information. The number of panels, where each appears in the record, and the information each contains depend on the record layout your admin configured for each record class. See the dedicated articles for all possible panels that may appear in individual records, organization records, entity records, and fusion records.

As shown in the following image, panels may appear on their own or your admin may have grouped multiple panels to appear as separate tabs within the same panel. If you click a tab, the panel changes to show only that kind of information.

[image removed]

For some panels to appear, such as the Notes or Files panels, at least one item of that type must be added to the record.

Some panels even have additional layout options. For example, information in the Messages panel can appear either in a single pane or in two panes.