2024 Solution Standards Playbook

Solutions

Solutions are comprehensive systems designed to encapsulate all information pertinent to a specific business process or workflow. Here's a structured approach to configuring your Solutions effectively:

Naming Solutions: The name of a Solution should accurately reflect the business process or workflow it represents. Aim for a concise name under three words. This conciseness ensures that the name is both memorable and easily identifiable, accurately conveying the essence of the business process or workflow it encompasses.

Creating Solution Guides:

- Comprehensive Descriptions: Each Solution guide should include detailed descriptions of every Table within the Solution, clarifying its purpose and role. This level of detail helps users understand how each component contributes to the overall functionality of the Solution.
- Workflow Explanation: Beyond individual Tables, the guide should articulate the workflow of the entire Solution. It should clearly outline how different elements interact and the sequence of operations within the business process.
- Incorporating Supporting Resources: Where necessary, supplement the guide with supporting resources and videos. These additions can offer deeper insights, provide practical demonstrations, and facilitate a more intuitive understanding of the Solution.
- Example Inclusions: To enhance comprehension, include detailed examples within the guide. These examples should illustrate real-world applications of the Solution, showing how various components function in practical scenarios.

By adhering to these principles, you ensure that your Solution is not only well-named but also accompanied by a guide that offers clarity, depth, and practical insights into its operation. This approach aids users in navigating and utilizing the Solution to its fullest potential, aligning with the intended business process or workflow.

Tables

When configuring tables in a solution, it's important to ensure that they are structured for optimal organization and accessibility of information. Here's a cohesive approach to setting up your tables:

- Purpose and Naming of Tables: Each table is designed to store information about a specific type of object, such as projects, tasks, campaigns, or products. The name of the table should accurately represent the item being tracked, although it need not be overly specific as a single table can encompass multiple types of that item. Aim for concise table names, ideally limited to less than two words.
- Customizing Record Terminology: In SmartSuite, you have the flexibility to modify the terminology used for records in a table to align with the type of item tracked. For instance, in a table tracking various projects, records could be termed as 'Projects' or 'Initiatives'. Customizing this terminology to reflect the nature of the table's content is highly recommended, as it enhances clarity and relevance for users.
- Configuring Table Views: Views in tables are predefined perspectives through which information is presented. A well-configured table should include 6-8 different views, tailored to the nature of the items in the table. For example, an events table might feature several calendar views to reflect its time-based nature, whereas a tasks table might lean more towards grid views for task organization. However, it's generally advisable for all tables to include at least one grid view, providing a comprehensive and structured overview of the information.

By following these guidelines, the tables in your solution will be well-organized, with clear naming conventions and customized views that cater to the specific type of data they hold. This ensures that users can easily navigate, understand, and interact with the information, leading to a more efficient and user-friendly experience.

Views

1. View Names

a. When configuring view names in a Solution, it's essential to choose names that accurately reflect the characteristics and settings of the view. The name should include key descriptors that underscore the specific configurations applied, such as the criteria used for grouping and filtering. For example, in a Contacts Table that is organized by 'Type' and filtered to display only contacts with an active status, an appropriate and descriptive view name could be "Active Contacts by Type." It's recommended to keep the view names concise, with a maximum of five words, to ensure they are straightforward and easily understandable.

2. View Descriptions

a. View descriptions in a solution provide essential context, helping users understand what they are looking at. They should be clear, concise, and relevant, enhancing user navigation and comprehension.

3. Record View

a. When configuring Record Views within a solution, it is crucial to organize fields effectively for easy navigation and comprehension. Here's a structured approach to setting up your Record Views:
b. Utilizing Sections for Organization:
    i. General Information at the Forefront: Start by placing the most general fields at the top of the Record View. This includes the Primary field, Status, and other overarching details. Label this section as “General Information” to clearly denote its purpose.
    ii. Strategic Section Placement: Following the General Information, additional sections should be created to categorize fields into relevant groupings. These sections not only aid in organization but also in guiding the user through the information logically.
    iii. Default Section State: To maintain a clean and uncluttered interface, set these additional sections to be collapsed by default. This approach allows users to expand each section as needed, focusing on specific information without being overwhelmed.
c. Creating Sections for Linked Records: For each linked record field, create a separate section. The title of each section should describe what the linked record represents. This method highlights the connections between different data sets, making it easier for users to understand the

relationships and navigate through the records. If linked records fall under a similar category, it is appropriate to store them in the same section.

d. Optimizing Page Layouts:
    i. Balancing the View with Layout Adjustments: Depending on the nature of the fields in your Record View, adjusting the page layout can significantly enhance readability and aesthetic appeal. For instance, if your Record View contains many text-heavy fields that span two columns, consider adopting a 70/30 layout. This layout allocates 70% of the width to one column and 30% to the other, creating a balanced and visually appealing distribution of content.
    ii. Customization for Clarity: Tailor the page layout to suit the specific collection of fields in your Record View. The goal is to present the information in a way that is both aesthetically pleasing and easy to digest, ensuring that users can efficiently find and process the data they need.
e. By implementing these strategies, your Record Views will be well-organized, user-friendly, and tailored to present information in the most effective way. The focus should always be on facilitating a seamless user experience where the organization of fields enhances the understanding and navigation of the data.

4. Grid View

a. To effectively configure Grid Views within a Solution, it's important to ensure that they not only summarize relevant records and fields but also present this data in an organized and accessible table format. Here's a cohesive guide on setting up your Grid Views:
b. Selecting Appropriate Fields:
    i. Coverage Without Clutter: The fields displayed in a Grid View should be comprehensive enough to cover the entire area, eliminating any white space. This creates a full and informative view.
    ii. Relevance to the View: The choice of fields should directly relate to the specific purpose of the Grid View. For instance, in a view titled 'Project Financials', it's pertinent to display fields such as 'Project Budget', 'Project Spent', and 'Project Remaining'. Conversely, less relevant fields like 'Project Milestones' or 'Designs' might be omitted to maintain focus on the financial aspects.
    iii. Implementing Groupings:
        1. Demonstrating Relational Nature: Applying groupings in the Grid View is essential to showcase the relational dynamics of the data. It helps users quickly discern patterns and categories within the information.

2. Criteria for Grouping: Commonly used fields for grouping include Status fields, single selects, multiple selects, and Linked Records. These groupings should be chosen to best reflect the inherent structure and interrelationships in the data.

iv. Managing Record Count: The Grid View should contain an adequate number of records to fill the viewable space, thus avoiding white space. Typically, having 12-15 records with complete data is a good starting point. This ensures that the Grid View is neither too sparse (leading to unused space) nor too crowded (which can hinder readability).

c. By adhering to these principles, your Grid View will not only effectively summarize the necessary information but will also present it in a way that is intuitive and user-friendly. The key lies in striking a balance between comprehensiveness and relevance, ensuring that every element of the Grid View directly contributes to a clearer understanding of the data.

5. Card View

a. Card Views should be used to help visualize the type of item you are tracking with basic information.
b. Fields to Display
    i. Cover Images
        1. Cover Image should be close to 16:10 ratio
    ii. Only a few important fields should be displayed in Card View to maintain a desired size of the Cards.
c. Groupings
d. Record Count

6. Kanban View

a. Kanban Views should be used to help visualize the type of item you are tracking and it's progression in a process
b. Fields to Display
c. Column Grouping
d. Cover Image
e. Record Count

7. Map View

a. Map Views should be used to help visualize items geographically. A Map View should always be created if there is an address field being utilized in the table.

8. Timeline View

a. Timeline views should be utilized to show items across a period of time. Timelines should be used if there is a Date Range field or Start Date and End Date such as a Due Date field.
b. Spotlights
    i. Spotlights should be used to help visualize the differences between items on the timeline, for example, using a spotlight to denote the status of different items on the timeline.

9. Form View

a. Customizing the Form:
    i. Name the form (e.g., "Contact Form"). It name should resonate with those that are filling out the form
    ii. Customize field labels: By default, the form will be empty. Add necessary fields. Existing fields can be reused, or new fields can be added using the field type picker. Change names to make them more context-appropriate for form users (e.g., rename 'Location' to 'Address').
        1. These changes will not affect the labels in the grid view.
    iii. Add help-text or instructions for each field.
    iv. Customize the form's appearance by uploading your logo or adding HTML blocks for design elements.

10. Gantt View

a. Grouping and Filtering: Determine how to group (e.g., by project) and filter tasks (e.g., by specific project).
b. Task Labels and Dependency Arrows: Enable these for better clarity. Sort tasks by due date for a streamlined view.
c. Spotlight Feature: Color-code tasks by phase or priority for easy identification.
d. Auto-Scheduling: Automatically adjust tasks based on dependencies.

11. Chart View

a. Chart views should be used to create visualizations for your data, displaying information in a variety of popular chart formats.
b. When selecting colors for a chart. Always prioritize the second level of colors from our color picker.
c. Bar Chart:
    i. Useful for comparing things between different groups or tracking changes over time.

    ii. Bars are displayed horizontally, with categories on the Y-axis and numerical values on the X-axis.
    iii. Supports functions like Sum, Min, Max, Avg.
d. Column Chart:
    i. Ideal for comparing things over time.
    ii. Bars are displayed vertically, with categories on the X-axis and numerical values on the Y-axis.
    iii. Supports functions like Sum, Min, Max, Avg.
e. Line Chart:
    i. Commonly used to track changes over periods of time.
    ii. Horizontal axis depicts a progression (often time), while the vertical axis shows a selected metric's value.
    iii. Preferred for small changes; supports functions like Sum, Min, Max, Avg.
f. Area Chart:
    i. Combines features of Line and Bar charts to show how values change over time.
    ii. Features shading between the line and the baseline.
    iii. Useful for depicting changes over time.
g. Pie Chart:
    i. Shows the percentage of a value or proportional information.
    ii. Categories represented as slices of a pie.
    iii. Suitable for visualizing proportions.
h. Donut Chart:
    i. Similar to Pie Chart but with a hole in the center.
    ii. Represents percentage or proportionality of a value.
    iii. Aesthetic choice for displaying proportions.
i. Scatter Chart:
    i. Uses dots to represent two different numeric values.
    ii. Great for showing relationships between variables.
    iii. Supports color-coding for quick identification.
j. Bubble Chart:
    i. Uses circles to represent numeric data and adds a third data series for circle size.
    ii. Often used for financial data.
    iii. Represents three dimensions of data.
k. Heatmap Chart:
    i. Uses color coding to represent different values.
    ii. Helps visualize data clustering or variations.
    iii. Useful for data analysis.

l.

12. Dashboard View

a. Dashboards serve as a central point for accessing resources, viewing charts, and monitoring metrics. They should be tailored to meet the specific needs of customers, yet adhere to certain standard formatting practices for clarity and efficiency.
    i. Placement and Types of Metrics: At the forefront of your dashboard, incorporate four metric-type widgets. These widgets, ideally in either a Comparison or Progress format, are crucial for summarizing data derived from your SmartSuite Tables. They also facilitate the comparison of key indicators over time. For visual balance and ease of interpretation, these widgets should be evenly spaced across the top of the dashboard.
    ii. Configuration of Charts: Directly below the metrics, your dashboard should feature three charts. This arrangement enhances the dashboard's flow and readability:
        1. Side Charts: Two of these charts, each occupying 25% of the dashboard's width, should be positioned on the left and right. Donut charts and bar charts are particularly effective in these spots, offering a clear, concise visual representation of data segments or categories.
        2. Central Chart: The third chart, claiming 50% of the dashboard's width, should be placed centrally. This chart is pivotal to the dashboard's purpose and is best suited for displaying complex data sets, such as those in a column chart. Its prominent placement and larger size allow for a more detailed and nuanced presentation of data.
    iii. Embedded Grid View: Following the metrics and charts, an embedded Grid view is essential. Positioned beneath these elements, the Grid view should display records of information that are directly relevant to the other components of the dashboard. This integration ensures a comprehensive and interconnected data presentation, where users can easily correlate chart visuals with underlying data records.
b. By adhering to these guidelines, your dashboard will not only present data efficiently but also ensure that users have a clear and coherent view of the information that matters most to them. The key is to balance aesthetic simplicity with the depth of data, making the dashboard both a visual and informational tool for decision-making.