Adding and Arranging Fields

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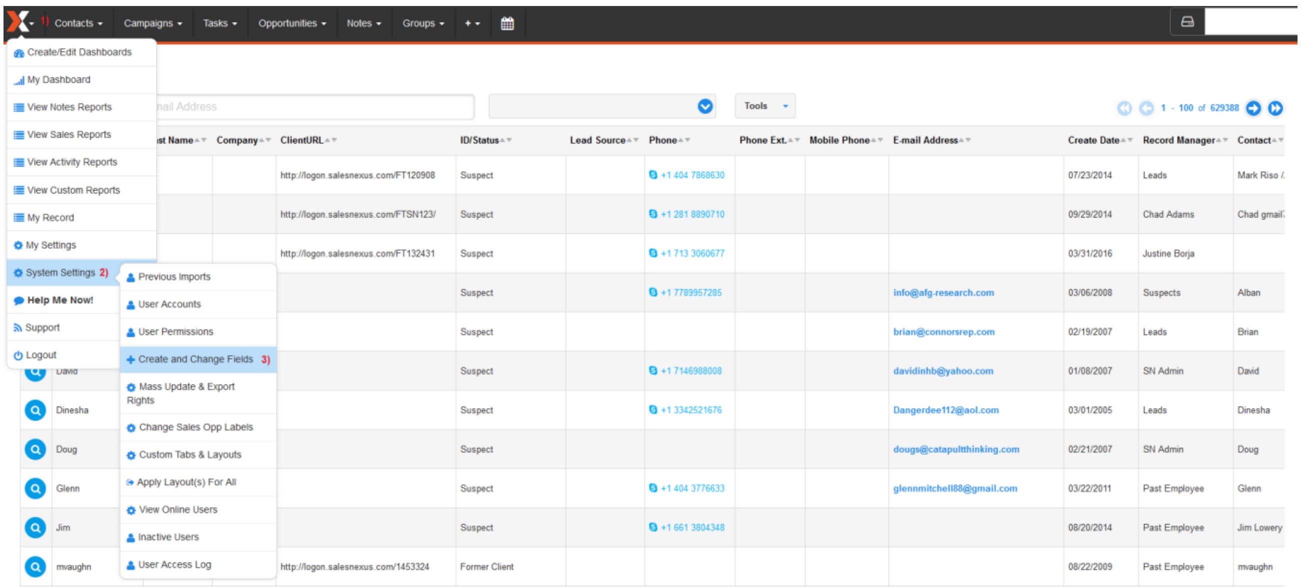
Adding Fields

From within your database, to create new fields, you can do the following:

1) Click on the SalesNexus logo at the upper left hand corner.

2) In the dropdown, choose System Settings.

3) Choose Create and Change Fields.



4) Click on the Add Field button.

5) Enter the name of the field you want to add (use alpha numeric characters only, no special characters or symbol).

6) Set the appropriate field type (Type, Character, Currency and others).

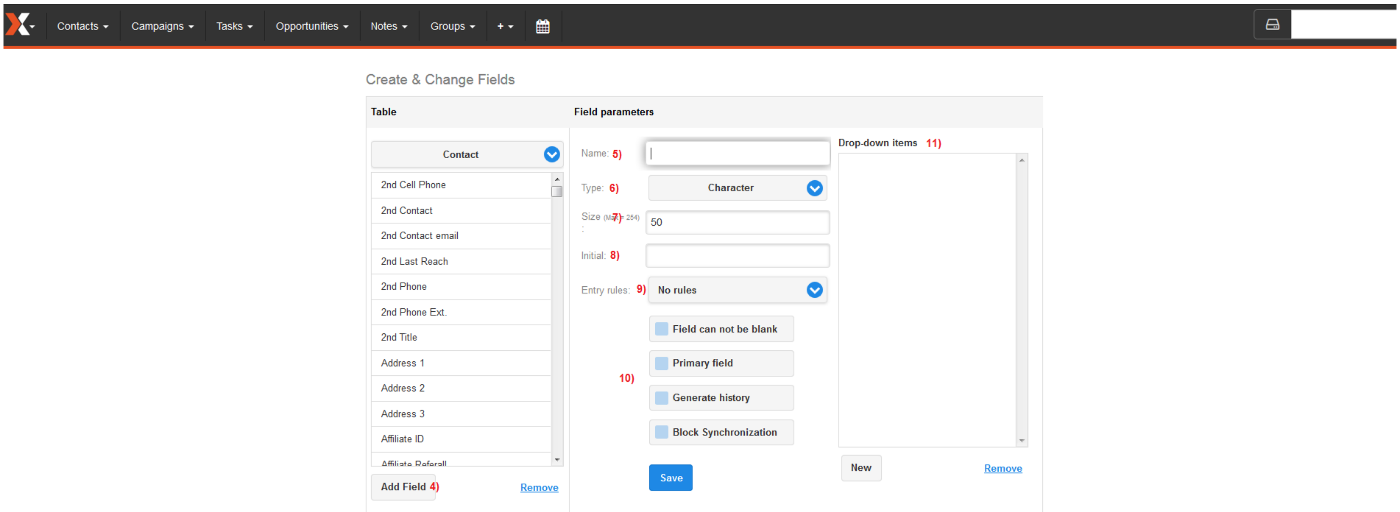
7) Select the number of characters that the field will allow for input.

8) Set the initial value that the field will display/hold.

9) Choose some additional entry options such as enforcing to only choose from dropdown or to block entry in this field as well.

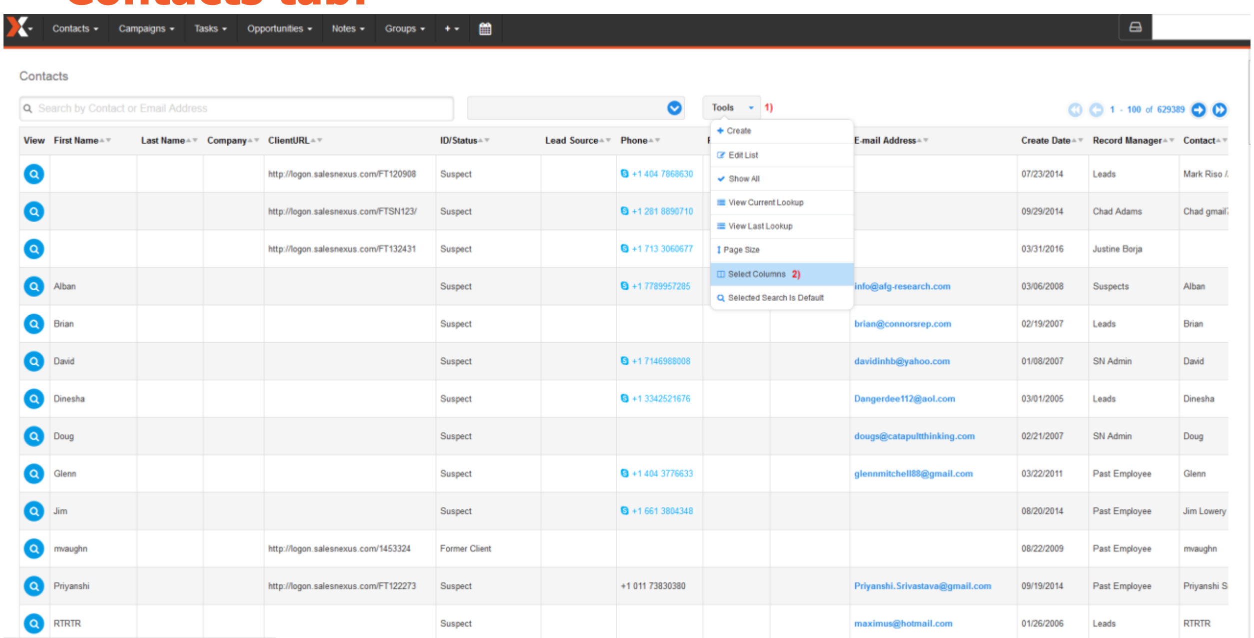
10) Choose other miscellaneous options.

11) Add/Delete field dropdown items by clicking the New button.



Applying Fields to Your Tab View

Contacts tab:



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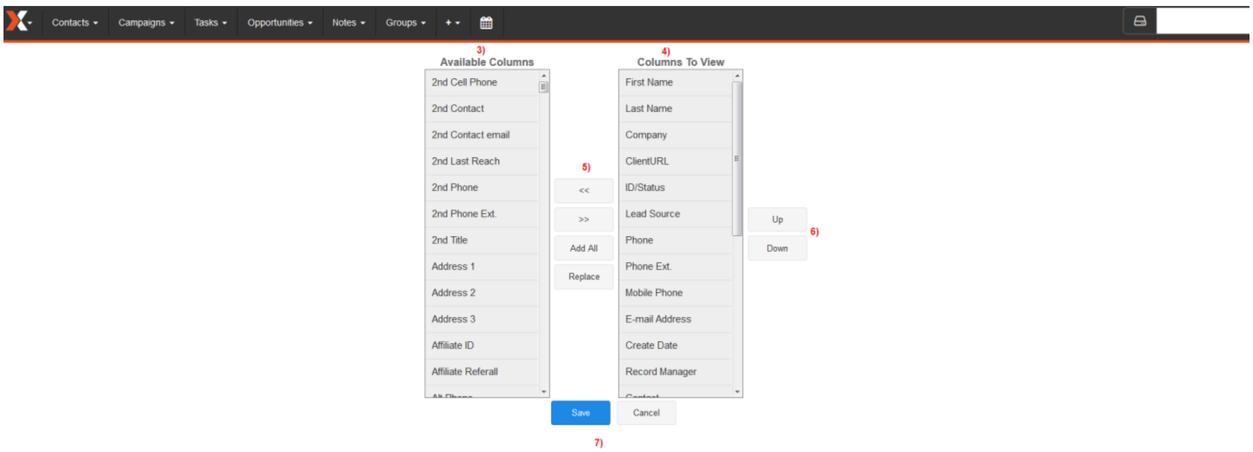
Target, Connect, Convert

1) Click on Tools.

2) Choose Select Columns



3) Available columns listing contains all the contact fields available in your system but are currently not in view.

4) Columns to view listing contain the contact fields in your system that is currently in display

5) You can adjust which columns you want to hide, and which ones you want to be placed in display in your view by using the arrows to arrange them accordingly.

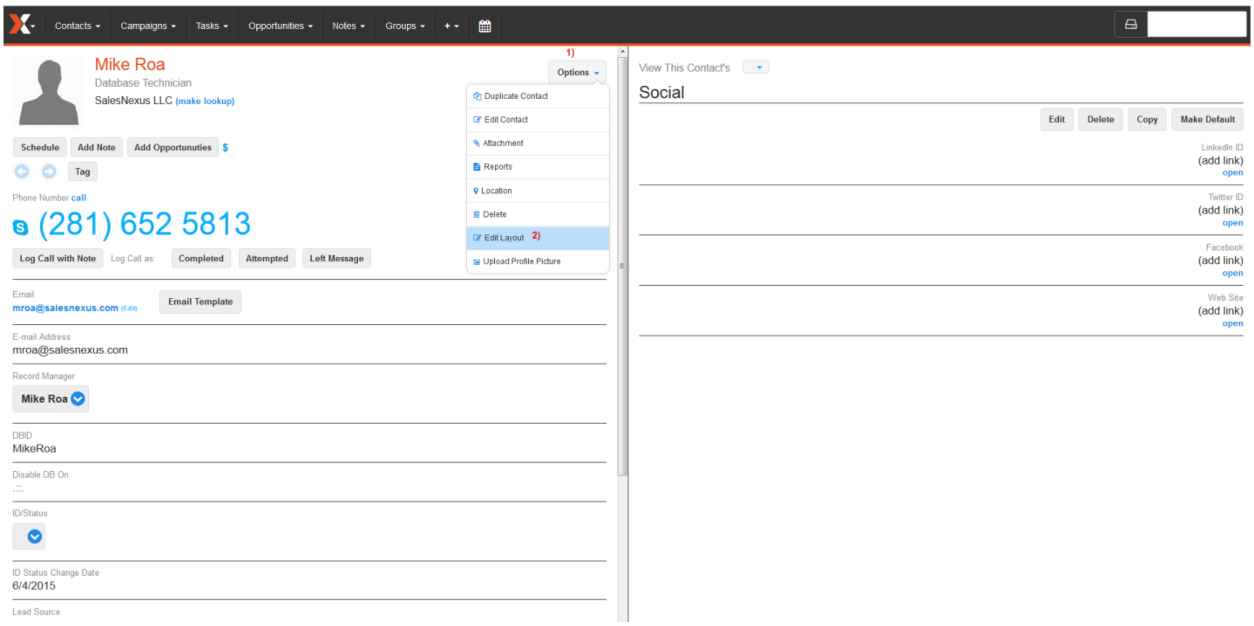
6) You can order the sort or the arrangement of the columns in view by clicking the field name and choosing whether you want them to be placed in a higher or lower arrangement position.

7) Click on Save to apply and save your changes.

Lookup Tab:

1) Click on the plus sign below the label “Contact” and the column chooser window should appear.

Contact Record View:



1) Click on the Options button.

2) Choose Edit Layout, and the column chooser window should appear on-screen.