# Adding and Arranging Fields



## **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.

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- 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.

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## **Applying Fields to Your Tab View**

### **Contacts tab:**

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٩	David				Suspect		+1 7146988008			davidinhb@yahoo.com	01/08/2007	SN Admin	David
۵	Dinesha				Suspect		+1 3342521676			Dangerdee112@aol.com	03/01/2005	Leads	Dinesha
۵	Doug				Suspect					dougs@catapultthinking.com	02/21/2007	SN Admin	Doug
<b>a</b>	Glenn				Suspect		+1 404 3776633			glennmitchell88@gmail.com	03/22/2011	Past Employee	Glenn
۵	Jim				Suspect		<b>S</b> +1 661 3804348				08/20/2014	Past Employee	Jim Low
۵	mvaughn			http://logon.salesnexus.com/1453324	Former Client						08/22/2009	Past Employee	mvaughr
٩	Priyanshi			http://logon.salesnexus.com/FT122273	Suspect		+1 011 73830380			Priyanshi.Srivastava@gmail.com	09/19/2014	Past Employee	Priyansł
0	RIRIR				Suspect					maximus@hotmail.com	01/26/2006	Leads	RTRTR



- 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:**

X - Contacts - Campaigns - Tasks - Opportunities - Notes - Groups - + -	<b>#</b>	<b>a</b>	
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- 1) Click on the Options button.
- 2) Choose Edit Layout, and the column chooser window should appear on-screen.