

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.

First Name	Company	ClientURL	ID/Status	Lead Source	Phone	Phone Ext.	Mobile Phone	E-mail Address	Create Date	Record Manager	Contact
		http://logon.salesnexus.com/FT120908	Suspect		+1 404 7968630				07/23/2014	Leads	Mark Riso /
		http://logon.salesnexus.com/FTSN123/	Suspect		+1 281 8890710				09/29/2014	Chad Adams	Chad gmail
		http://logon.salesnexus.com/FT132431	Suspect		+1 713 3060677				03/31/2016	Justine Borja	
			Suspect		+1 7789957285			info@afg-research.com	03/06/2008	Suspects	Alban
			Suspect					brian@connorsrep.com	02/19/2007	Leads	Brian
			Suspect		+1 7146988008			davidshb@yahoo.com	01/08/2007	SN Admin	David
			Suspect		+1 3342521676			Dangerdee112@aol.com	03/01/2005	Leads	Dinesha
			Suspect					doug@catapultthinking.com	02/21/2007	SN Admin	Doug
			Suspect		+1 404 3776633			glennmitchel188@gmail.com	03/22/2011	Past Employee	Glenn
			Suspect		+1 661 3804348				08/20/2014	Past Employee	Jim Lowery
		http://logon.salesnexus.com/1453324	Former Client						08/22/2009	Past Employee	mvaughn

- 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.

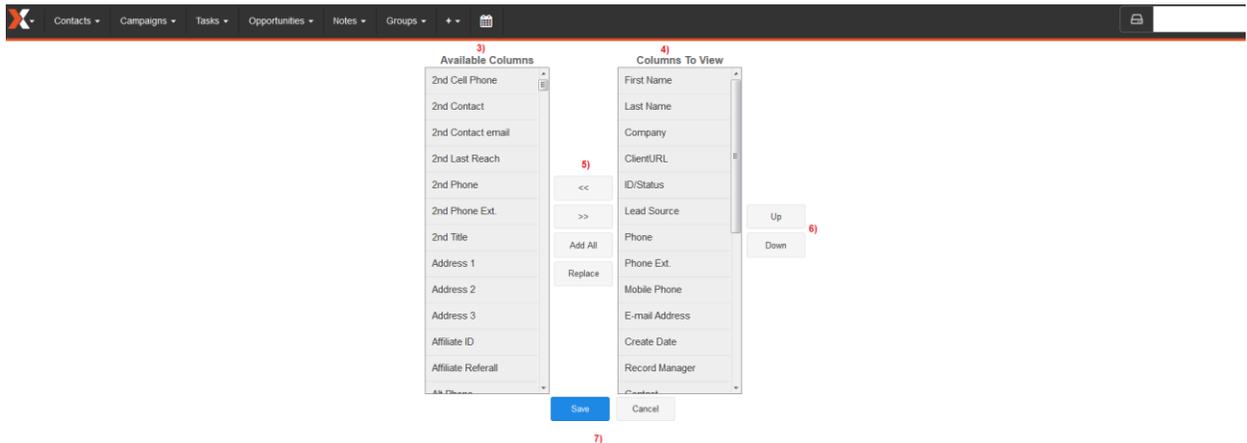
11) Add/Delete field dropdown items by clicking the New button.

Applying Fields to Your Tab View

Contacts tab:

View	First Name	Last Name	Company	ClientURL	ID/Status	Lead Source	Phone	E-mail Address	Create Date	Record Manager	Contact
				http://logon.salesnexus.com/FT120908	Suspect		+1 404 7869630				
				http://logon.salesnexus.com/FTSN123/	Suspect		+1 281 8990710				
				http://logon.salesnexus.com/FT132431	Suspect		+1 713 3060677				
	Alban				Suspect		+1 7789957285	Info@afg-research.com	03/06/2008	Suspects	Alban
	Brian				Suspect			brian@connorsrep.com	02/19/2007	Leads	Brian
	David				Suspect		+1 7146980008	davidinh@yahoo.com	01/08/2007	SN Admin	David
	Dinesha				Suspect		+1 3342521676	Dangerdee112@aol.com	03/01/2005	Leads	Dinesha
	Doug				Suspect			dougs@catapultthinking.com	02/21/2007	SN Admin	Doug
	Glenn				Suspect		+1 404 3776633	glennmiche88@gmail.com	03/22/2011	Past Employee	Glenn
	Jim				Suspect		+1 661 3804348		08/20/2014	Past Employee	Jim Lowery
	maughn			http://logon.salesnexus.com/1453324	Former Client				08/22/2009	Past Employee	maughn
	Priyanshi			http://logon.salesnexus.com/FT122273	Suspect		+1 011 73830380	Priyanshi.Srivastava@gmail.com	09/19/2014	Past Employee	Priyanshi S
	RTRTR				Suspect			maximus@hotmail.com	01/26/2006	Leads	RTRTR

- 1) Click on Tools.
- 2) Choose Select Columns

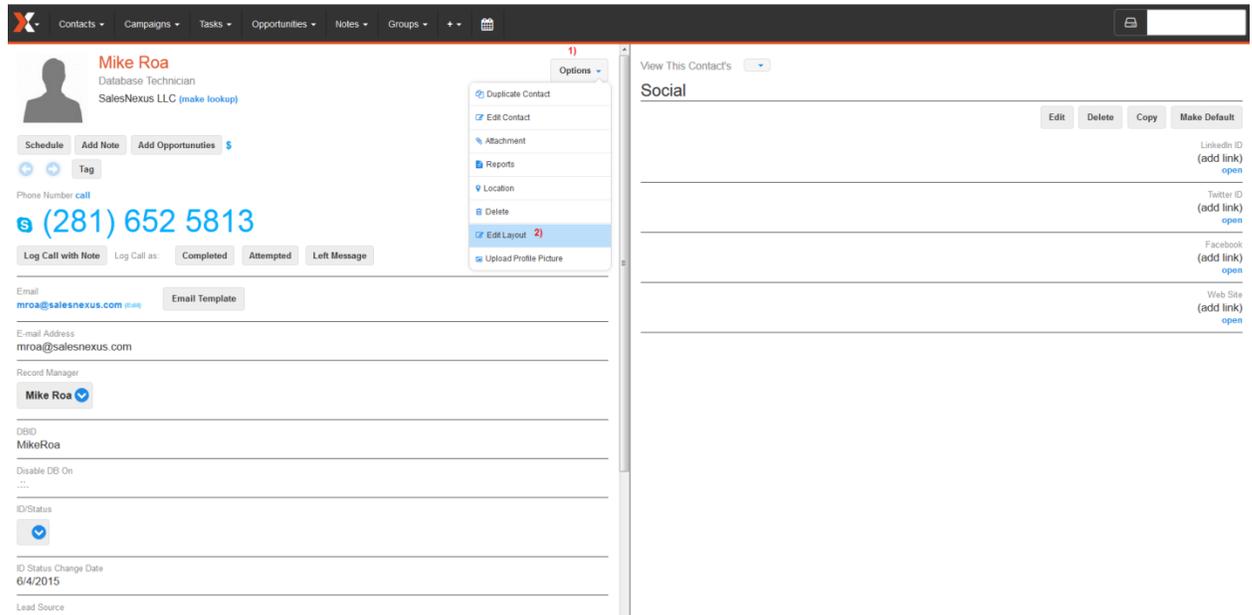


- 3) Available columns listing contains all the contact fields available in your system but are currently not in view.
- 4) Columns to view listing contain the contact fields in your system that is currently in display
- 5) You can adjust which columns you want to hide, and which ones you want to be 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:



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