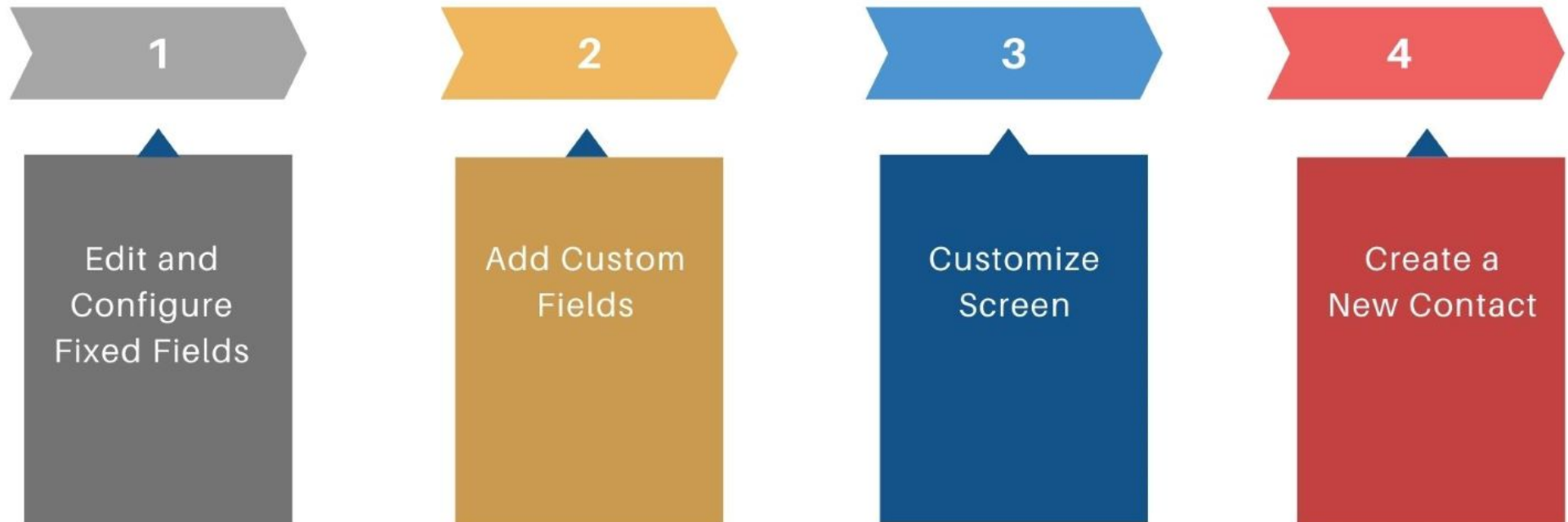


QUICK SETUP GUIDE FOR CONTACT MANAGER



Step 1: Edit & Configure Fixed Fields

Select Admin

Click on Contacts

Select Fixed Fields

Edit Field

Configure List Fields

Add the desired field

Click on Update to save changes

Set Permissions

Add list items

Click Add & Save to save list item

To edit fields, click on Edit icon

To configure a field, click on the Configure icon

1

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Display Name	Field Type	List screen	Required	Role Permission			Actions
				Read	Add New	Edit	
Section: Personal Information							
Alternate Email Address	Email			All Users	All Users	All Users	
Alternate Work Phone	Text - Short			All Users	All Users	All Users	
Assistant Name	Text - Short			All Users	All Users	All Users	
Assistant Phone	Text - Short			All Users	All Users	All Users	
Birthdate	Date			All Users	All Users	All Users	
Company Name	List - Pick	✓		All Users	All Users	All Users	
Currency Type	List			All Users	All Users	All Users	
Department	Text - Short			All Users	All Users	All Users	

Edit - Contact field

*** Display Name** Department

Field Type Text - Short

Show in list screen? ☐

Required? ☐

Section Name Personal Information

Permission by role

Read All Users

Add New All Users

Edit All Users

Update

Configure - Currency Type

Add Items Yen

Existing options for : Currency Type

-- Select--

- Australian Dollar
- British Pound
- Canadian Dollar
- Euro
- Indian Rupee
- Lire

Step 2: Add Custom Field

Click on Contacts > Admin
and select Custom fields

1

To add a new field, click
on Add Custom field

2

Fixed Fields

Custom Fields

Related Info

Web Form

Rules

Customize Screen

Relations

Manage Duplicates

Custom Fields

Next

Add Custom Field

Display Name	Field Type	List screen	Required	Role Permission			Actions
				Read	Add New	Edit	
Section: Other Information							
No. of users	Number			All Users	All Users	All Users	
Type of license	List			All Users	All Users	All Users	
Section: Additional Information 1							
Campaigns sent	Boolean			All Users	All Users	All Users	



Add - Contact field

Add field name 3 * Display Name License Issue Date

Select field type 4 Field Type Date

Checkmark the desired fields and select the Section 5 Show in list screen? Required? Section Name Additional Informa...

Click on Add button to save the custom field 7 Add Cancel

Permission by role

Read All Users

Add New All Users

Edit All Users

6 Set Permissions

Step 3: Customize Screen

To set up fields as per your preference, click Contacts > Admin and then select Customize Screen

1

The screenshot displays the 'Customize Screen' interface with a top navigation bar containing the following tabs: Fixed Fields, Custom Fields, Related Info, Web Form, Rules, Customize Screen (highlighted), Relations, and Manage Duplicates. The main area is divided into six sections, each with an 'Edit' link and arrow controls:

- Hidden Fields**: Contains a list with 'Assistant Phone'. An arrow points from this section to a callout box.
- Personal Information**: Contains a list with 'First Name', 'Title', 'Last Name', 'Salutation', and 'Company Name'.
- Address Information**: Contains a list with 'Address Line 1', 'Address Line 2', 'City', 'State', and 'Zip/Postal Code'. An arrow points from this section to a callout box.
- Other Address Information**: Contains a list with 'Other Address Line 1', 'Other Address Line 2', 'Other City', 'Other Zip/Postal', and 'Other State'.
- Other Information**: Contains a list with 'Created User', 'Notes', 'Created Date', 'Modified Date', and 'Modified User'.
- User-defined fields**: Contains a list with 'Version', 'Serial No.', 'Application', 'Contact Type', and 'No. of Users'. An arrow points from this section to a callout box.

Drag and drop fields to Hidden fields section, if you do not wish them to display

5

To change the title, click on Edit

2

Interchange the sections by clicking on the desired arrow buttons

3

Arrange the fields in desired order with the up and down arrow keys

4

Step 4: Creating a new Contact

Select Contacts **Click New** **Fill in the required information in the fields** **Click Save**

1 2 3 4

Applications Desktop CRM **Contacts** Accounts Opportunities Campaigns Competitors Invoices Calendar Tasks Documents Customer Portal HRM Service

Welcome List **New** Reports Import/Export Tags Call List Admin

New Contact Save

Personal Information

First Name	Peter	*Last Name	Day	
Title	Manager	Salutation	Mr	
Work Phone	700-700-7001	Department	Sales & Marketing	
Email Address	sample.contact@testcompany.com		Parent Account	Sample Company
Reports To	Mr.Schumacher		Web Site	https://testcompany.com
Email Opt-Out?	☒		Alternate Email Address	sample2@testcompany.com
Mobile Phone	700-700-7002	Alternate Work Phone	700-700-7004	