

QUICK SETUP GUIDE FOR CONTACT MANAGER



Step 1: Edit & Configure Fixed Fields

Click on Contacts **1**

Select Admin **2**

	First Name	Last Name	Company Name	Email Address	Country
☆	Sales	OC	OC	salesoc1234@gmail.com	
☆	Demo	marketing	Axis	oocmarketing.45@gmail.com	
☆	Peter	Day	Chrome	peterday@sampleco.com	United States
☆	Jess	Jonas	Axis	jess@oc.com	United States
☆	Trial	Account		trial@oc.com	
☆	Test	Demo	Chrome	testdemo@oc.com	United States
☆	Reece	Smith	OC	reece@oc.com	Australia
☆	Carl	Taylor	OfficeClip LLC	ctaylor@oc.com	France

Select Fixed Fields **3**

To edit fields, click on Edit icon **4**

To configure a field, click on the Configure icon **5**

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 Field

Add the desired field **6**

Click on Update to save changes **8**

Set Permissions **7**

Configure List Fields

Add list items **9**

Click Add & Save to save list item **10**

Step 2: Add Custom Field

Click on Contacts > Admin and select Custom fields

To add a new field, click on 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	



3 Add field name → * Display Name: License Issue Date

4 Select field type → Field Type: Date

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

6 Set Permissions → Permission by role: Read: All Users, Add New: All Users, Edit: All Users

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

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 dark navigation bar at the top containing the following tabs: Fixed Fields, Custom Fields, Related Info, Web Form, Rules, Customize Screen (highlighted), Relations, and Manage Duplicates. Below the navigation bar, there are six panels, each representing a different section of the screen:

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

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

The screenshot shows a CRM interface for creating a new contact. The left sidebar contains a menu with 'Contacts' selected. The top navigation bar includes 'New', 'Reports', 'Import/Export', 'Tags', 'Call List', and 'Admin'. The main form is titled 'New Contact' and contains the following fields:

Field Name	Value
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?	<input checked="" type="checkbox"/>
Alternate Email Address	sample2@testcompany.com
Mobile Phone	700-700-7002
Alternate Work Phone	700-700-7004

Numbered callouts indicate the steps: 1. Select Contacts (points to the 'Contacts' menu item), 2. Click New (points to the 'New' button in the top navigation bar), 3. Fill in the required information in the fields (points to the 'Last Name' field), and 4. Click Save (points to the 'Save' button in the top right corner).