Custom Fields

Last Modified on 15/11/2022 11:06 am EST

Occasionally users may find it necessary to store additional customer information against a customer record. Our custom field option allows users to achieve this with ease.

Right click on customer grid Admin-->setup custom fields

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	*	Admin	×	Delete Customer	H			
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Enter whatever description you want against any custom field

For example: using 'Field 1 Name' to store a SAGE Customer Code. Enter the label name for the field, then save.

		Contact Management Parameter Setup	x
Contact Custom Fields Custo	omer Custom Fields		
Field 1 Name 💶 2.	Field 8 Name	Field 15 Name	
SAGE Customer Code			
Field 2 Name	Field 9 Name	Field 16 Name	
Field 3 Name	Field 10 Name		
Field 4 Name	Field 11 Name	Date 1 Name	
Field 5 Name	Field 12 Name	Date 2 Name	
Field 6 Name	Field 13 Name		
Field 7 Name	Field 14 Name		
1. Field Names A Field N	Vames B		
Save Tab		Save All	

Then edit any customer, click the fields tab and enter your SAGE customer code

Customer Maintenance							
Address	Financials Credit Card	Others	Notes	Fields Attachments	s		
SAGE Cus ROGUE01	tomer Code						
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				No	No		
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