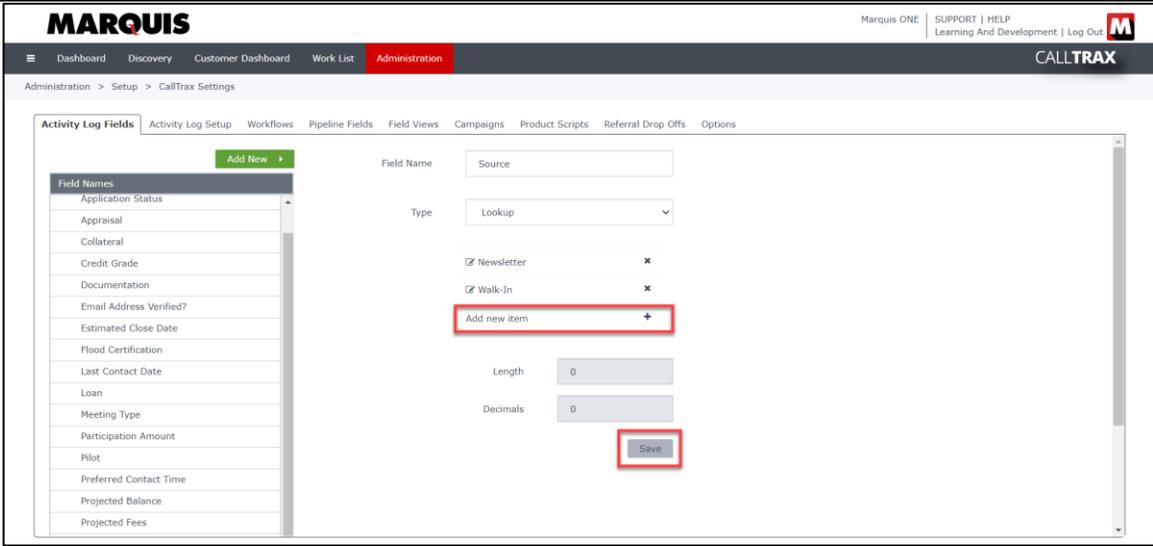


MARQUIS

CLTX401	CallTrax NEXT Create Activity Log Fields: Lookup Fields
	The following procedures will guide you through creating new Lookup Activity Log Fields within CallTrax NEXT as well as managing those that have been created.
Order of Steps	Tasks
Step 1	Log into CallTrax NEXT .
Step 2	On the landing page, click on Administration from the main menu
Step 3	Hover the mouse over Setup, and click on CallTrax Settings
Step 4	If the active tab is not Activity Log Fields , click on it within the list
Step 5	If a blank setup is not showing, click the green Add New button
5.1	Type the description in the Field Name box
5.2	Click the drop-down arrow in the Type box
5.3	Select Lookup
Note: The Length and Decimal boxes will be grayed out as they are disabled when selecting the Lookup type.	
5.4	To add a lookup option, click the Add new item + button
5.5	Type in a selection or item within the Value name box
5.6	Click the check mark to save the value
5.6	Repeat that process for each value that is desired to be an option in the list
5.7	Once all lookup options have been created, click the Save button
	
Step 6	To edit the lookup options in the field, click on the field in the list
6.1	To edit the description of an option, click the paper and pencil button
6.2	Type in the new description and click the check mark
6.3	Repeat the process for all desired options
6.4	Click the Save button
Step 7	To remove a lookup value from a field, click on the field in the list
7.1	Click the X button next to the lookup option
7.2	Click the Save button to complete the deletion

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CALLTRAX

Administration > Setup > CallTrax Settings

Activity Log Fields Activity Log Setup Workflows Pipeline Fields Field Views Campaigns Product Scripts Referral Drop Offs Options

Add New →

Field Name: Source

Type: Lookup

Walk-in

Direct Marketing

Email Campaign

Social Media (Twitter, FaceBook, LinkedIn)

Length: 0

Decimals: 0

Save Delete

Field Names

- Alert Type
- Application Status
- Appraisal
- Collateral
- Credit Grade
- Documentation
- Email Address Verified?
- Estimated Close Date
- Flood Certification
- Last Contact Date
- Loan
- Meeting Type
- Participation Amount
- Pilot
- Preferred Contact Time
- Projected Balance

Step 8 To mark the field for deletion, click on the field in the list

8.1 Click the **Delete** button

8.2 Click **Yes** to the confirmation message

Note: When a field is deleted, it is moved to the bottom of the list and will not be available within any Activity Logs. However, since it contains information in past logs, it will not be completely removed and can be restored, if desired.

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CALLTRAX

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Add New →

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Field Names

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Step 9 To restore a deleted field, click on the field in the list

9.1 Click the **Restore** button

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The screenshot displays the Marquis CALLTRAX Administration interface. The top navigation bar includes the Marquis logo, a menu icon, and links for Dashboard, Discovery, Customer Dashboard, Work List, and Administration (highlighted in red). On the right, it shows 'Marquis ONE', 'SUPPORT | HELP', 'Learning And Development | Log Out', and the CALLTRAX logo.

The main content area is titled 'Administration > Setup > CallTrax Settings'. Below this, there are several tabs: Activity Log Fields, Activity Log Setup, Workflows, Pipeline Fields, Field Views, Campaigns, Product Scripts, Referral Drop Offs, and Options. The 'Activity Log Fields' tab is active, showing a list of fields on the left and configuration options on the right.

The 'Activity Log Fields' list includes: Documentation, Email Address Verified?, Estimated Close Date, Flood Certification, Last Contact Date, Loan, Meeting Type, Participation Amount, Pilot, Preferred Contact Time, Projected Balance, Projected Fees, Projected Rate, Reason, Sales Code, Term (months), Preferred Branch, and Source. The 'Source' field at the bottom has a red 'x' icon next to it, which is highlighted with a red box.

The configuration options on the right include: Outbound Call (checked), Walk-in (checked), and Direct Marketing (checked). Below these are input fields for 'Length' (value: 0) and 'Decimals' (value: 0). At the bottom right, there are 'Save' and 'Restore' buttons, with the 'Restore' button highlighted by a red box.