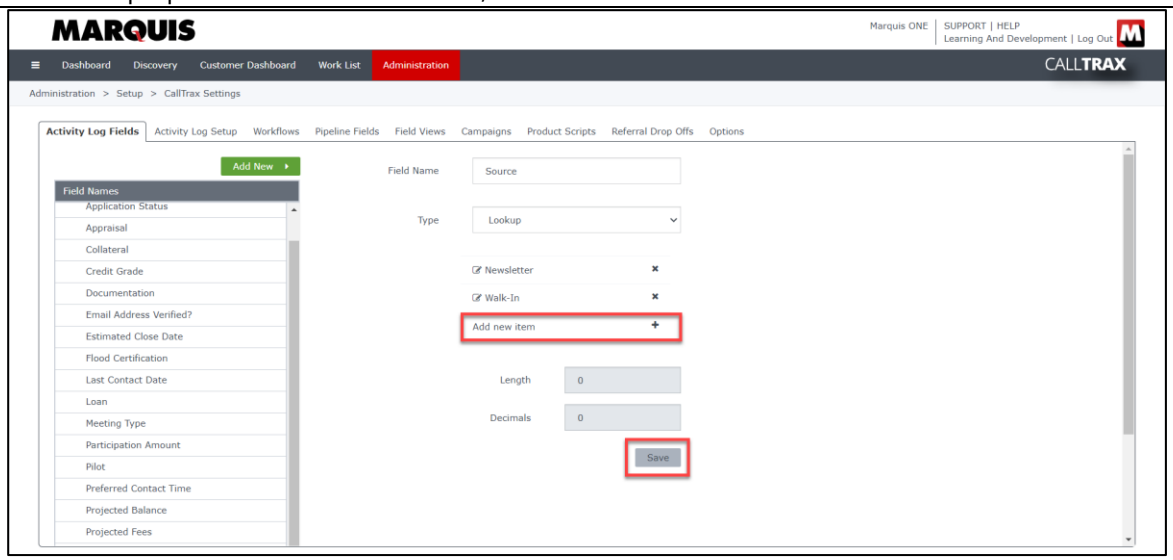
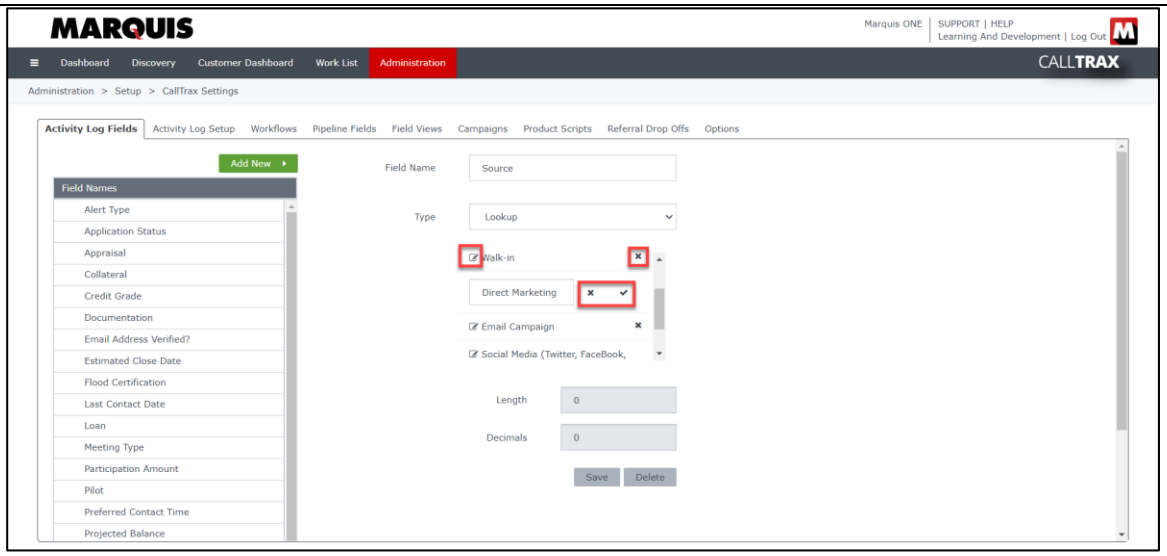
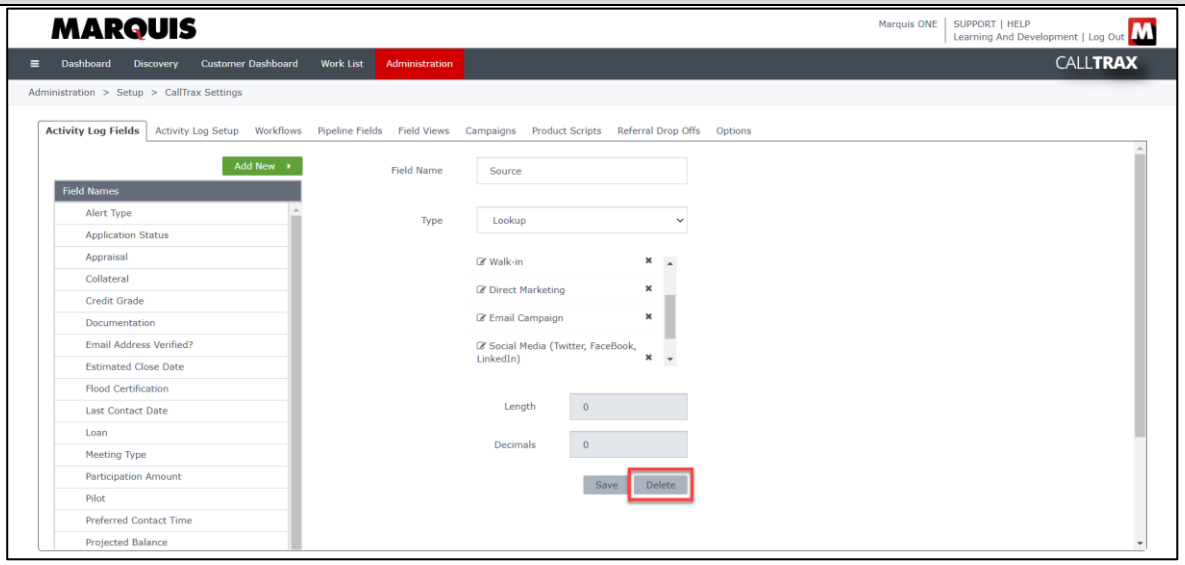
MARQUIS

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

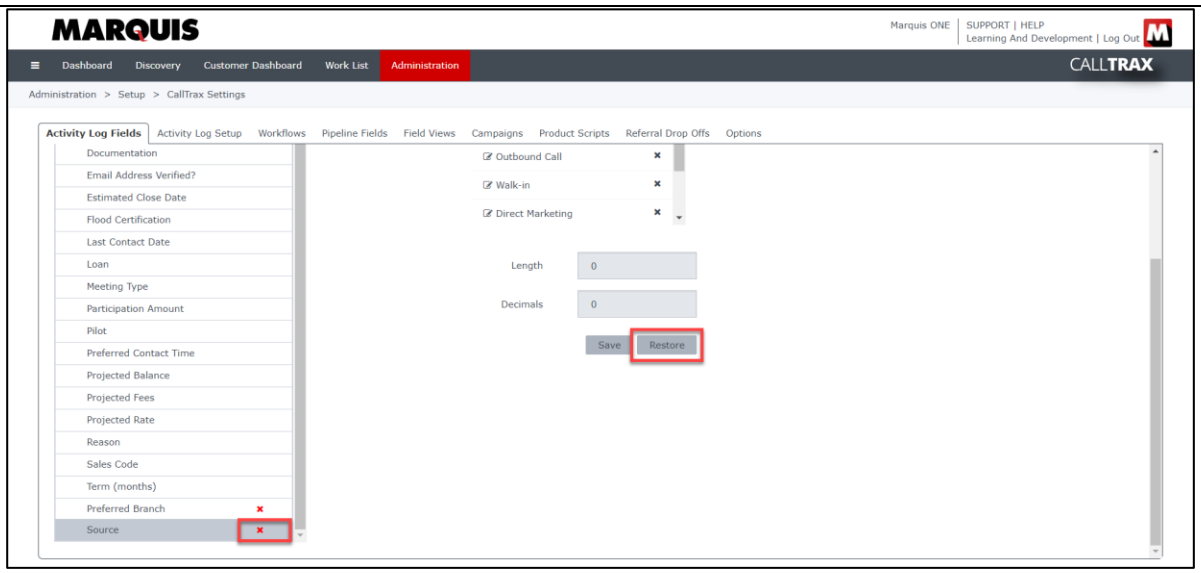


Step 8	To mark the field for deletion, click on the field in the list
8.1	Click the **Delete** button
8.2	Click **Yes** to the confirmation message

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.



Step 9	To restore a deleted field, click on the field in the list
9.1	Click the **Restore** button

	 MARQUIS Marquis ONE SUPPORT | HELP Learning And Development | Log Out Dashboard Discovery Customer Dashboard Work List Administration CALLTRAX Administration > Setup > CallTrax Settings Activity Log Fields Activity Log Setup Workflows Pipeline Fields Field Views Campaigns Product Scripts Referral Drop Offs Options 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 Source Outbound Call Walk-in Direct Marketing Length 0 Decimals 0 Save Restore