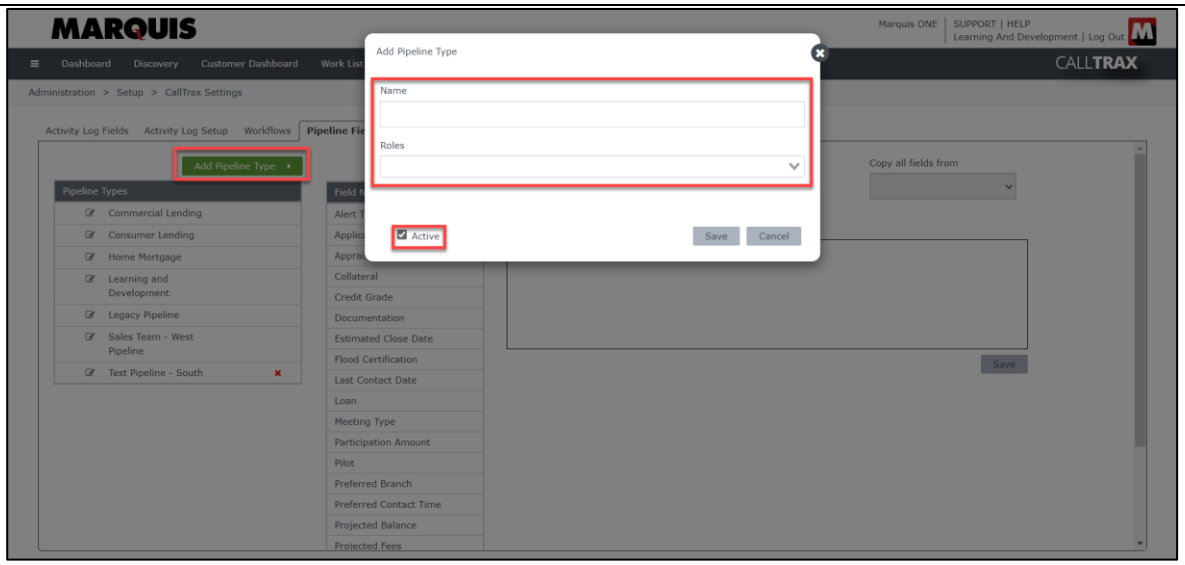
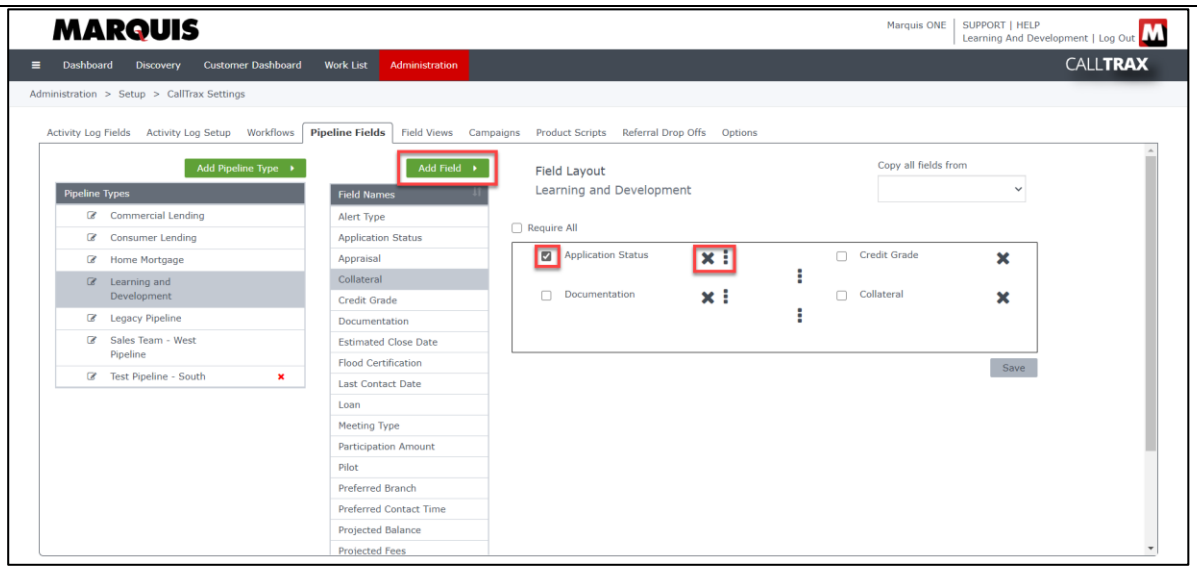
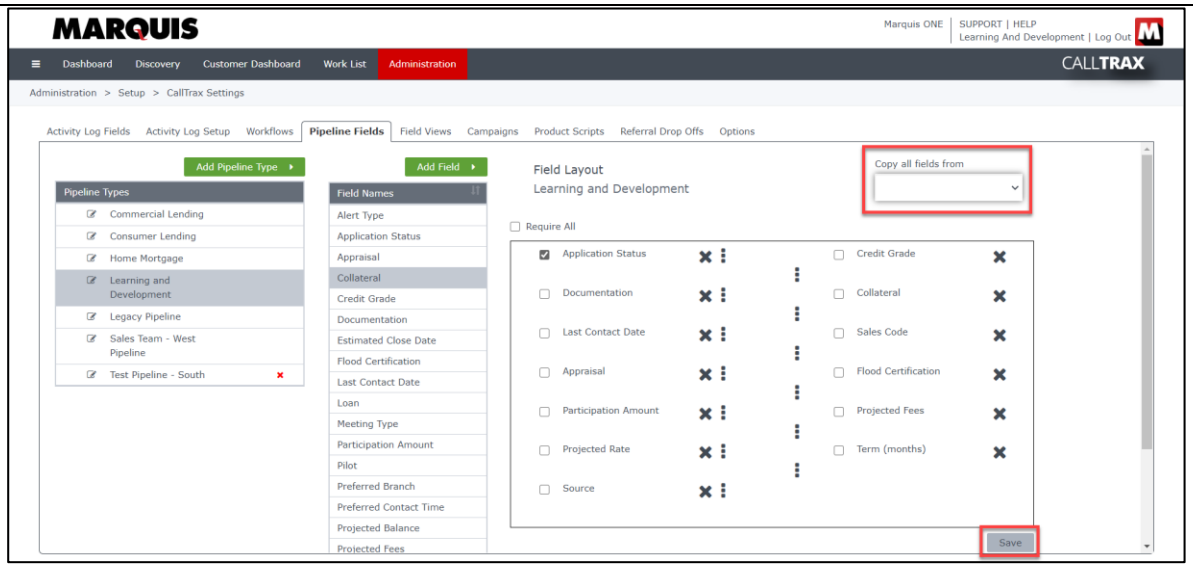
MARQUIS

CLTX512	CallTrax NEXT Pipeline Fields Management
	The following procedures will guide through creating Pipeline Types and assigning fields to them for each role within CallTrax NEXT.
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	Click on the **Pipeline Fields** tab
Step 5	To create a new Pipeline Type, click the green **Add Pipeline Type** button
5.1	Type the name of the Pipeline Type into the **Name** box
5.2	To select Roles that will have access to the Pipeline Type, click the drop-down arrow in the **Roles** box
5.3	Click on all of the desired role(s) to select them
5.4	By default, the Active box will be checked. To deactivate, uncheck the **Active** box
5.5	Click the **Save** button
	
Step 6	To define to the **Field Layout** for the Pipeline Type, click on the Pipeline Type within the list
6.1	To add a field to the layout, click on the desired **field** in the list
6.2	Click the green **Add Field** button
	Repeat the steps to add more fields
Step 7	To mark a field as **required**, place a **check mark** in the box to the left of the field name
7.1	To mark all fields as required, place a check mark in the **Require All** box
Step 8	To **remove** a field that has been added, click on the **X** located to the right of the field
Step 9	To adjust the order of the field, click on the **three dots** to the right of the field, drag and drop in the desired location

	
Step 10	To **copy fields** from another Pipeline Type, click the drop-down arrow in the “Copy all fields from” box
10.1	Click on the **Pipeline Type** from within the list
10.2	The fields will auto-populate in the Field Layout once the “Copy all fields from” type is selected
	Repeat the previous steps to set the preferred layout
	
Step 11	To **edit** an existing Pipeline Type **field layout**, click on the desired Pipeline Type name
11.1	Repeat the steps above to add or remove fields
11.2	Click the **Save** button to retain any changes made
Step 12	To edit the **Name** or **Active** status of a Pipeline Type, click the edit button next to the Pipeline name
12.1	Make the desired changes
12.2	Click **Save** button to retain changes