

Quick Setup for Administrators

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Application Administration (Contact Manager)

Contacts

1. a– Edit Fixed Fields

OfficeClip Contact Manager can customize fixed fields to help track more relevant information and other controls, such as, making selected fields required and which Member Roles may modify a Contact's information.

1. Select the Contacts the main OfficeClip toolbar (bottom left).
2. Select Admin in the Contacts toolbar.
3. Select Edit Fixed Fields within the Contacts toolbar.
4. Select the edit icon under the Functions column for the respective field.
5. Set options.
6. Click Update.

1. b– Add Custom Fields

Custom fields or UDFs (User Defined Fields) provides the ability to add contact information that is not set in the Fixed Fields. This is also useful for categorizing contacts (e.g. create a new field titled "Chicago Sales Team"), so that Filters can be created to display contacts within that field or to easily send campaigns to a custom category of contacts.

1. Select the Contacts the main OfficeClip toolbar (bottom left).
2. Select Admin in the Contacts toolbar.
3. Select Edit UDFs within the Contacts toolbar.
4. Click Add Udf.
5. Set options.

6. Click Add.

1. c– Rename Sections

Contact information is sectioned into four default categories: Personal Information, Address Information, Other Information and User-defined fields. The Rename Sections feature provides the ability to edit these.

1. Select the Contacts the main OfficeClip toolbar (bottom left).
2. Select Admin in the Contacts toolbar.
3. Select Rename Sections within the Contacts toolbar.
4. Edit given Sections.
5. Click Save.

Accounts

Accounts are used to organize or group selected contacts (e.g. customers, clients, contractors, etc.)

1.d – Edit Fixed Fields

OfficeClip Contact Manager can customize fixed fields to help track more relevant information and other controls, such as, making selected fields required and which Member Roles may modify an Account's information.

1. Select the Contacts the main OfficeClip toolbar (bottom left).
2. Select Accounts from the left-side menu.
3. Select Admin in the Contacts toolbar.
4. Select Edit Fixed Fields within the Contacts toolbar.
5. Select the edit icon under the Functions column for the respective

field.

6. Set options.
7. Click Update.

1.e – Add Custom Fields

Custom fields or UDFs (User Defined Fields) provides the ability to add account information that is not set in the Fixed Fields.

1. Select the Contacts the main OfficeClip toolbar (bottom left).
2. Select Accounts from the left-side menu.
3. Select Admin in the Contacts toolbar.
4. Select Edit UDFs within the Contacts toolbar.
5. Click Add Udf.
6. Set options.
7. Click Add.

1.f – Rename Sections

Account information is sectioned into four default categories: Account Information, Address Information, Company Information and Other Information. The Rename Sections feature provides the ability to edit these.

1. Select the Contacts the main OfficeClip toolbar (bottom left).
2. Select Accounts from the left-side menu.
3. Select Admin in the Contacts toolbar.
4. Select Rename Sections within the Contacts toolbar.
5. Edit given Sections.

6. Click Save.

Opportunities

Opportunities are used to track details and communication of potential sales inquiries.

1.g – Edit Fixed Fields

Officeclip Contact Manager can customize fixed fields to help track more relevant information and other controls, such as, making selected fields required and which Member Roles may modify an Opportunity's information.

1. Select the Contacts the main OfficeClip toolbar (bottom left).
2. Select Opportunities from the left-side menu.
3. Select Admin in the Contacts toolbar.
4. Select Edit Fixed Fields within the Contacts toolbar.
5. Select the edit icon under the Functions column for the respective field.
6. Set options.
7. Click Update.

1.h – Add Custom Fields

Custom fields or UDFs (User Defined Fields) provides the ability to add opportunity information that is not set in the Fixed Fields.

1. Select the Contacts the main OfficeClip toolbar (bottom left).

2. Select Opportunities from the left-side menu.
3. Select Admin in the Contacts toolbar.
4. Select Edit UDFs within the Contacts toolbar.
5. Click Add Udf.
6. Set options. (Field type definitions can be found at: ???)
7. Click Add.

1.i – Rename Sections

Opportunity information is sectioned into four default categories: Access Information, User Information, Other Information and Additional fields. The Rename Sections feature provides the ability to edit these.

1. Select the Contacts the main OfficeClip toolbar (bottom left).
2. Select Opportunities from the left-side menu.
3. Select Admin in the Contacts toolbar.
4. Select Rename Sections within the Contacts toolbar.
5. Edit given Sections.
6. Click Save.