Customize The Default Drop Down Menus

You can customize drop-down field options in contact, task, opportunity, and order records. You can easily add or remove options that do not apply to your company. Customizing the drop-down fields can speed up data entry, improve accuracy, and minimize confusion.

Contact Fields

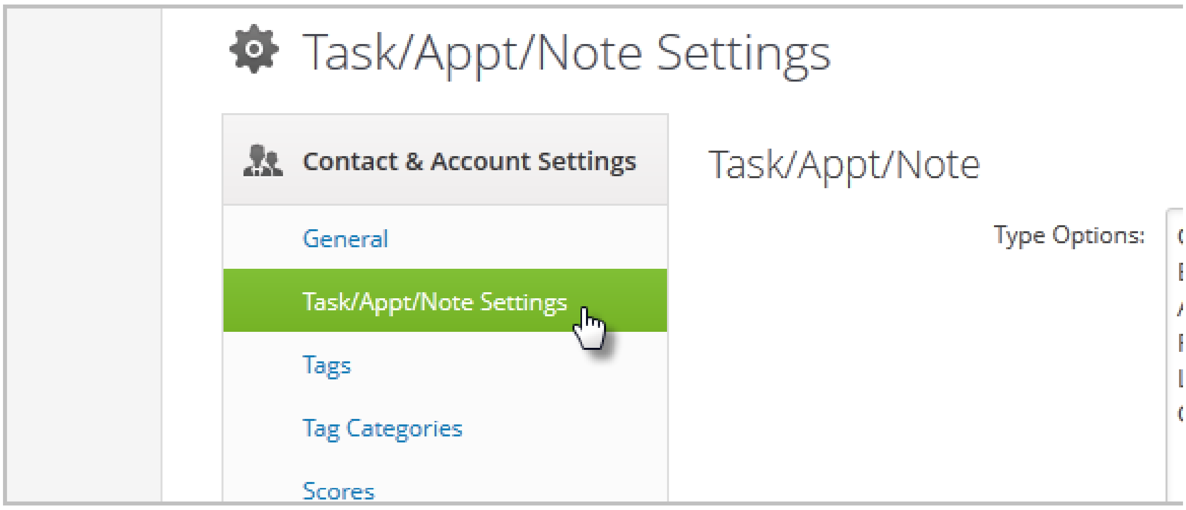
1. Go to **CRM** > **Settings** in the main navigation menu.

2. Add more list options (one to each line) or edit the existing ones (i.e. contact type, title, phone type, etc.) then click on the **Save** button at the bottom of the page.

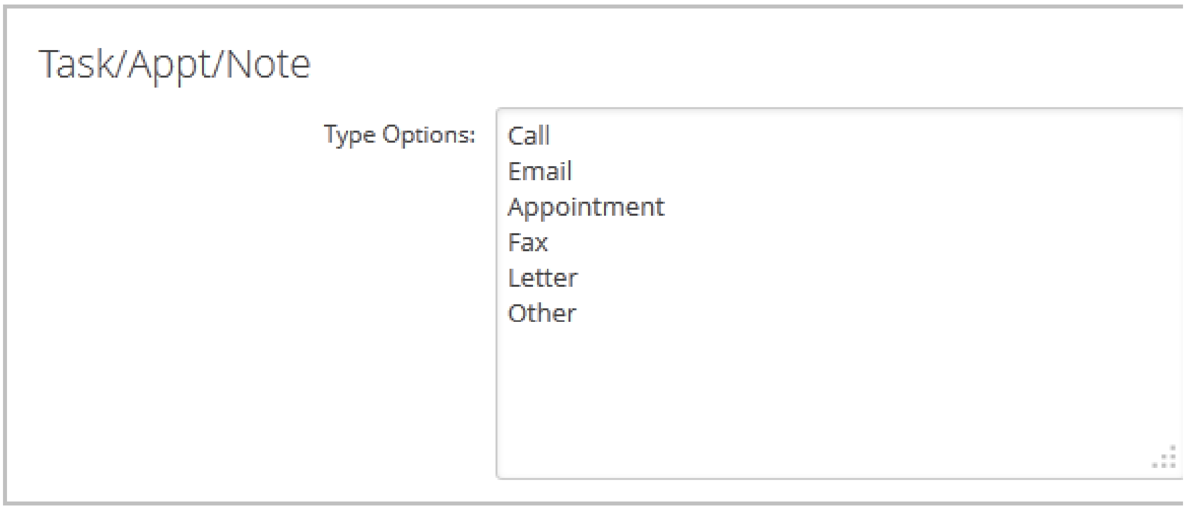
Task, Appointment, & Note Fields

1. Go to **CRM** > **Settings** in the main navigation menu.

2. Click on **Task/Appt/Note** in the settings menu.



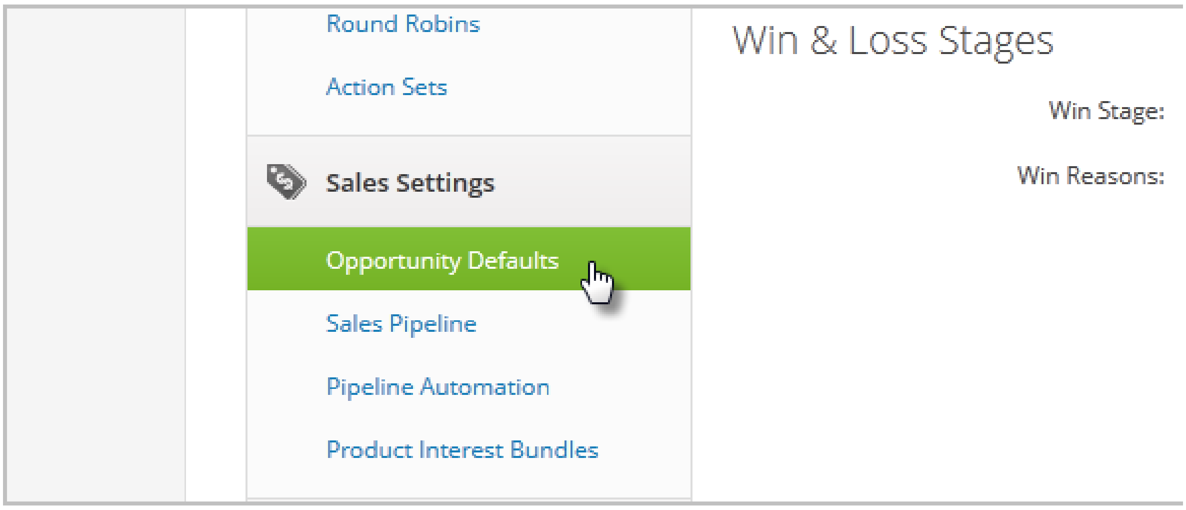
3. Add more list options or edit the existing ones and click on the **Save** button.



Opportunity Fields

1. Go to **CRM > Settings** in the main navigation menu.

2. Click on **Opportunity Defaults** in the settings menu.



3. Add win and loss reasons to the list and click on the **Save** button.