View Custom Fields In Contact Searches %

This article applies to:

- 1. Navigate to CRM > Contacts in the main navigation menu
- 2. (Optional) Click on **New Search** if available. This will reset any previous search criteria and you can skip to step 4.

| Contacts |
|---|
| Actions ~ New Search Edit Criteria/Columns Save Print |
| Loopard Adama AAAAA |

3. Click Edit Criteria / Columns...

| Contacts |
|---|
| Actions ~ New Search Edit Criteria/Columns Save Print |
| Leonard Adams |

4. Click the **Columns** Tab

| Search | General | Address | Phone/Email | Custom Fields | Misc Criteria | Columns |
|-------------|---------|--------------|------------------------------|---------------|---------------|---------|
| | | is on Seai | rch Results | | | |
| ustom Colur | nns: | | Available Flo Last 4 ssn | elds: | | |
| Name | | ~ ~ × | Middle nam | e | * | |
| Email | | ~ ~ × | Assistant na Assistant ph | | | |
| | | A V X | Title | | | |
| Birthday | | | Suffix | | | |

5. Add a Custom Field as a Column. Click on the name of the custom field in the "Available Fields" box and then click on the small arrows in between the boxes to move your field over to the left.



6. Click OK

| | Cou | tal o intry eet a |
|---|----------------------|-------------------------|
| V | Cancel Reset Filters | |
| | Birthday: | De |
| | Phone 1: 366-5100 | Le |
| | City: Fredericton | 0 |

7. Your custom field will now be available in the Search Results.

| | Add a Cor | ntact | |
|---------|---------------|-------------|--|
| S | aved Searches | ~ | |
| 50 | → per page | ■ | |
| Phone 1 | State | Lead Source | |