Customize The Default Drop Down Menus

Last Modified on 10/30/2024 11:09 am MST

This article applies to:

Max Classic

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

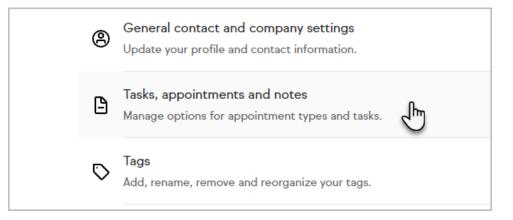
1. Go to CRM > Settings in the main navigation menu.

	Visitors	Dynamic Content	Action
	Zapier Integrations	Landing Pages	Promo
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Edit my nav	Reports <u>Settings</u>	Reports Settings	Reports
Leonard Adams	3		
Nickname		Company Name	
None	None		
Email		Phone 1	

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 Tasks, appointments and notes 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.

Sa	les	
	~	Opportunity defaults Manage sales stages and buy now options.
	000	Sales pipeline Customize your pipeline to align with your sales process.

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