

Create Type

1. From **CRM** module, click **Types**. Types screen will appear.

Types

Save Undo Close

+ Insert

▲ Up

▼ Down

✕ Remove

Export

View

Filter (F3)

Type*	Description	Icon	Is Campaign Type	Default Campaign Type
<input type="checkbox"/> Webinar	One or a Series	Information	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Discovery Call	Discovery Call	Information	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Conference			<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> GoToMeeting	Web-meeting for collab.	Information	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Collections	Task	Information	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> eMail	eMail		<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Trade Show	Trade Show		<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Mini CAB	CAB		<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Feedback Calls	CAB Feedback Responses		<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Action Item	FUP Action	Information	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> CAB	Customer Advisory Board		<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Product Pre-Launch	For marketing new product to existing ...	Information	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Quote	Prepare/Send Quote	Information	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Call: Warm	Call	Information	<input type="checkbox"/>	<input type="checkbox"/>

?

2.34s

Ready

Refresh

- 2. To add Type, go to the next available row or click Insert button.
- 3. Provide ***Type**, Description, Icon. (Status should be unique)
- 4. Check Is Campaign Type or/and Default Campaign Type.
- 5. Click Save button to save the type.

**user can add multiple Typeas long as the Type is unique.*

**text - denotes required field to create Type*