Custom Fields

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It’s important to us that you get the most out of your Sales Automation tool; therefore, we’ve added custom fields to help you tailor your experience. Capture additional data when managing a lead or proposal such as expected go-live date. Navigate to the custom fields setup menu. When creating a custom field, choose the entity where you want this field to appear (Lead or Proposal), select the field type (specify advanced options, if applicable), name the custom field, and choose the order in which it will appear. You also have the option to mask the data if it is sensitive information or require validation of the data in the custom field.