

## **Re-arranging the order for your Contact and Loan Custom Fields and loan Dates**

We have discussed in previous videos about the Contact Custom Fields, the Contact Loan Custom Fields and also the Loan Dates shown in your contact record views. You can rename these Contact and Loan Custom fields for your customization of your database. For more information on renaming the fields, see the other flash videos or refer to your WorkCenter Quick Start User Guide.

The Contact Custom Fields can be located by clicking on the custom fields tab in your contact record. The Contact Loan Custom fields are located under the “Loans” tab and then the Custom Fields tab. Your loan dates are also located under the contact “Loans” tab.

The procedure to change the order for all three of these tabs is the same. For this example, we will display the Contact Custom Fields. To change the order for the custom fields and or dates in your contact records you will need to follow these steps:

**Step #1:** Open the contact screen view by double clicking on the contact name. When the screen view appears, we will select the “custom fields” tab for this example.

**Step #2:** As you can see, there are 25 custom fields in this view. To re-arrange the order, right click your mouse in the fields area and select “Customize”.

**Step #3:** You will see a “Customize Screen Box” appear. Click and drag all the name listings into this box and then drag them out in the order you wish them to appear. Once you have completed the process, close the customized screen box and close your contact record. The changes you have made will be a universal change and be reflected in all contact records.

**Step #4:** If you wish to re-arrange the “Loan Dates” and or “Custom Loan Fields”, follow the same procedures as outlined above.