Custom Directories Configuration

CRM custom Directories can be configured according to your needs.

The basic configuration principles are the same for all type of directories:

- the list of attributes and their order
- configuration of the particular attribute (if applicable)

There is some specificity related to custom directories management. Let's look closer.

Custom Directory creation

To create a custom Directory go to the Layouts settings → Directories tab → click on "Create directory" button. You'll see a *Directory Creation Form* where a structure for the directory should be specified. Fill **Name**, **Field Title** and choose a **Field Type**.

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Adding a Custom Directory to a Company/ Contact card

When custom Directories are created you can add them to a Company or a Contact card following the steps:

1. Go to the Companies/ Contact directory Layouts settings.
2. Create a field with a Directory field type.
3. In the appeared Directory field choose the one you'd like to add → Tab field will be named and created automatically.
4. Click "Add".

How to use custom directories on a Company/ Contact card

⚠️ Please note, working with a custom Directory assumes that you need to create its options in Directories page first and then choose them from the available ones on a Company/Contact card.

When Directory attribute is added to a Company/ Contact card, you can choose its options right in the card view:

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Table custom directory type can not be shown on the Companies/ Contact grid so far, but can be viewed and edited right from the web-section in the issue view.