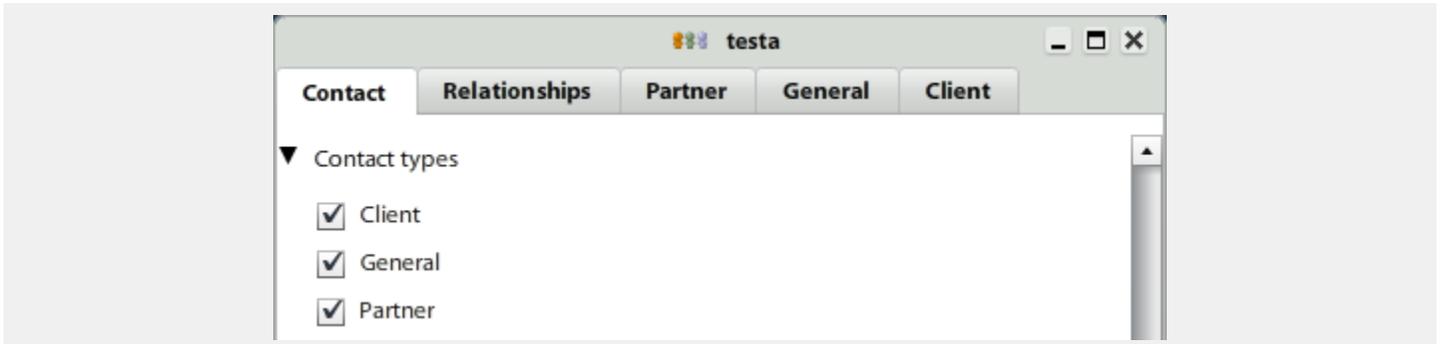


## Created with a trial version of ScreenSteps

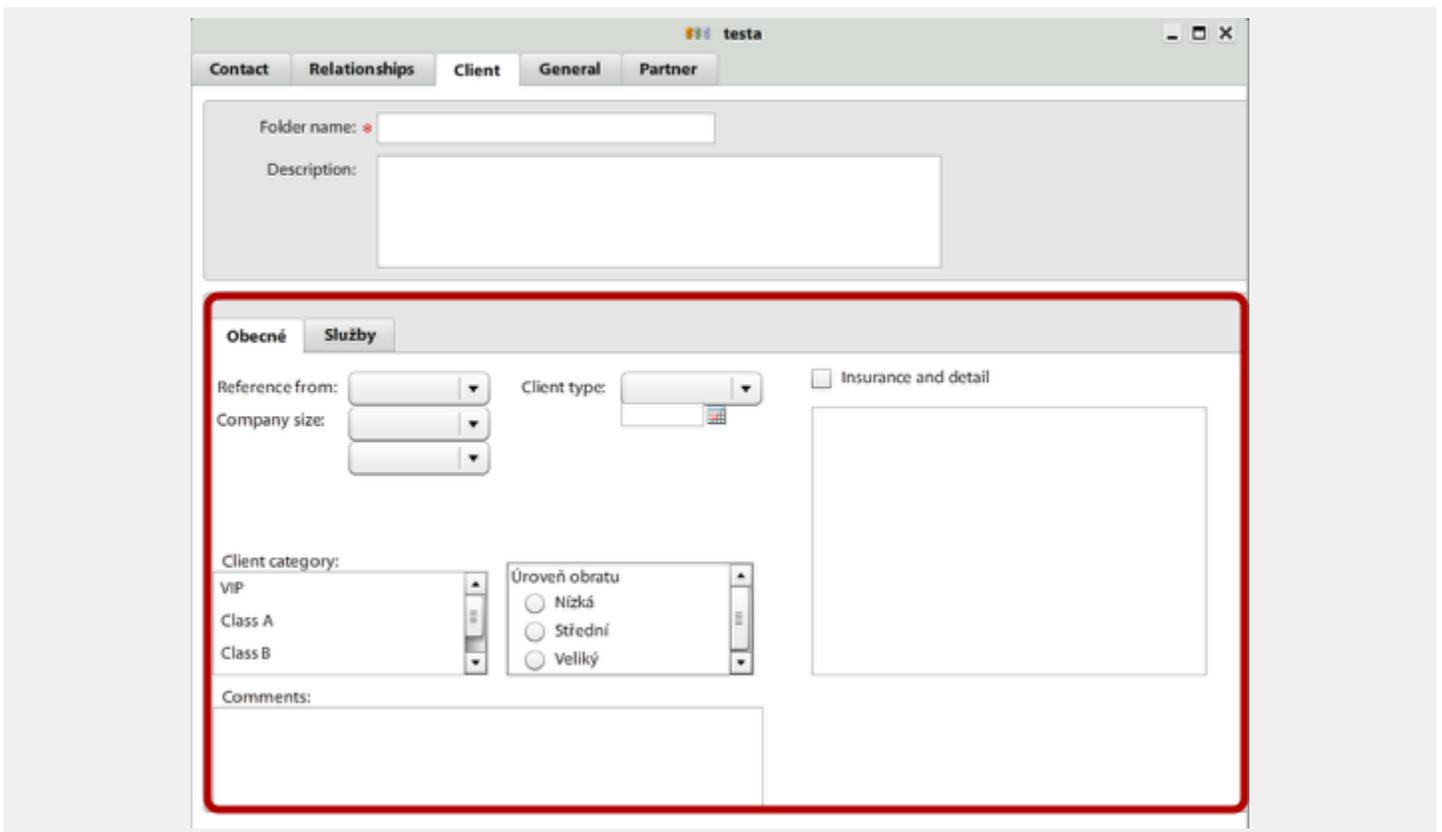
Other tabs are specified with types of contact. There might be as many other tabs as much of contact types are added to that contact. All of that tabs has optional fields and tabs.

## Number of other tabs



When we create the contact we select this three check boxes so three new tabs appear.

## View of Client tab - befor Save or Apply



You dont need to fill up **Folder name** in this step. The Folder name is autmoatically retaken from the company or person **Name**.

All field in the section above are optional (instead of Folder name and Description).

## View of Client tab - after Save or Apply

The screenshot shows a CRM interface for a 'Client' record. The main window has tabs for 'Contact', 'Relationships', 'Partners', 'Clients', and 'General'. The 'Clients' tab is active, showing a client named 'testa' with a status of 'Potential' and a reference ID of '0561'. Below this is a toolbar with various icons. The main content area is divided into sections: 'Obecné' (General) and 'Služby' (Services). The 'Služby' section contains several dropdown menus for 'Reference from', 'Company size', and 'Client type', along with radio buttons for 'Úroveň obrátu' (Level of turnover) and a checkbox for 'Insurance and detail'. A 'Comments' field is also present. At the bottom, there is a table titled 'Responsible users' with columns for 'User', 'Role', 'Note', and 'Primary'. The table contains one entry for 'Jindra Pištková' with the role 'Creator' and a checked 'Primary' box.

User	Role	Note	Primary
Jindra Pištková	Creator		<input checked="" type="checkbox"/>

1. Header of contact type
  - a. **Status** - user definable field. It might has values like "Potential, Current, Archived".
  - b. **Ref. Id** - unique Id for selected contact folder (in this case Client).
  - c. **Edit** - for editing the contact type name and description.
2. Tabs related to this contact. All of that tabs might be removed or kept depending on user setting. For more info about this tabs see the [Finder](#) section.
3. All field in this section are **optional** and you can have whatever you want here.
4. **Responsible users** - see bellow.

## Responsible users

User	Role	Note	Primary
Jindra Pištková	Creator		<input checked="" type="checkbox"/>

If there is some of the users (your employees - the system users) which are related with the created client. There might be in this section.

Fields:

**User** - system user (probably your employee).

**Role** - role of user (or relationship) in connection with client. This role depends on User setting and the Contact type. The roles listed in this column is the **intersection of the User setting and the Contact type**.

**Note**

**Primary**

Functions:

1. **Add new related user** - by clicking the plus icon.
2. **Remove related user** - by clicking the cross icon.