Add Tabs to Contact Record

Speech	*Cursor Actions*
If the standard fields in contact records do not have a place to put some specific information you need to record, then you can add additional, custom fields to the contact records.	
For example, let's say you want to create a new tab in the contact record to record allergies and other medical alerts for your clients. Creating extra tabs and fields is done through Lookup Lists.	Show Console.
Click Utilities, Customize Database, and Lookup Lists.	Expand Utilities. Expand Customize Database. Click Lookup Lists.
Choose the Contacts area,	Choose “Contacts” in Area.
then choose the Extra Fields list.	Choose “Extra Fields” in Lookup Lists.
Click New to add a new field.	Click New.
Under “Field in Contact Record” choose Extra 1, as this is the first extra field you are adding.	Choose Extra 1.
Name in Dialog lets you specify the label that will appear on this field in the contact record.	
If you're adding a new field to record medical alert information, perhaps the first field would be a list of Allergies.	Enter “Allergies.”
Name in Templates lets you specify the name that will be used to refer to this field when it is being used in a document template, for mail merge purposes. Note that a name for use in a template cannot contain spaces.	Enter “Allergies.”
You can group extra fields into different tabs in the contact record. This helps you categorize the information you're recording in extra tabs. Dialog Tab Name refers to which extra tab you want this field to appear on. All extra fields whose dialog tab name is the same will be presented in the same tab of the contact dialog.	Highlight “Extra” in Dialogue Tab Name.
Since we're adding fields to record medical alert information, let's call this tab “Medical Alert.”	Enter “Medical Alert.”
Entry Order indicates the order that the field should appear in within its extra tab in the contact record. Note that these numbers do not need to be sequential.	Highlight “0” in Entry Order.

In fact, it's often most convenient to enter them in increments of 5 or 10 so that later you can insert a field between two others without having to re-sequence all of them.	Enter “10.”
The Data Type drop-down menu allows you to specify how the field should appear in the contact record. Choose the appropriate type of field for recording this information.	Expand Data Type drop-down menu.
For this field, we'll choose Text.	Choose “Text.”
“Visible only to users who can see sensitive data” makes this field confidential, so only certain users can see it. If necessary, set this checkbox to ensure sensitive client information recorded in this field is protected.	Point to checkbox.
“This is a password, so obscure during entry” causes Sumac to show the content of this field as bullets, instead of the actual text to restrict the content of this field only to users who can see sensitive data. So if the information you're entering in this field is a password, it is protected.	Point to checkbox.
Click OK, to save the new field.	Click OK.
Continue this process until you have created all the fields for this tab in the contact record.	Enter all information for new lookup lists.
You need to restart Sumac before these changes take effect.	Close Sumac. Logon again. Click Contacts.
Notice that now, when we open the contact record, there is a new tab called Medial Alert that was custom built for this database.	Open a contact record. Click on Medical Alert tab.
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