

What is a Choice List?

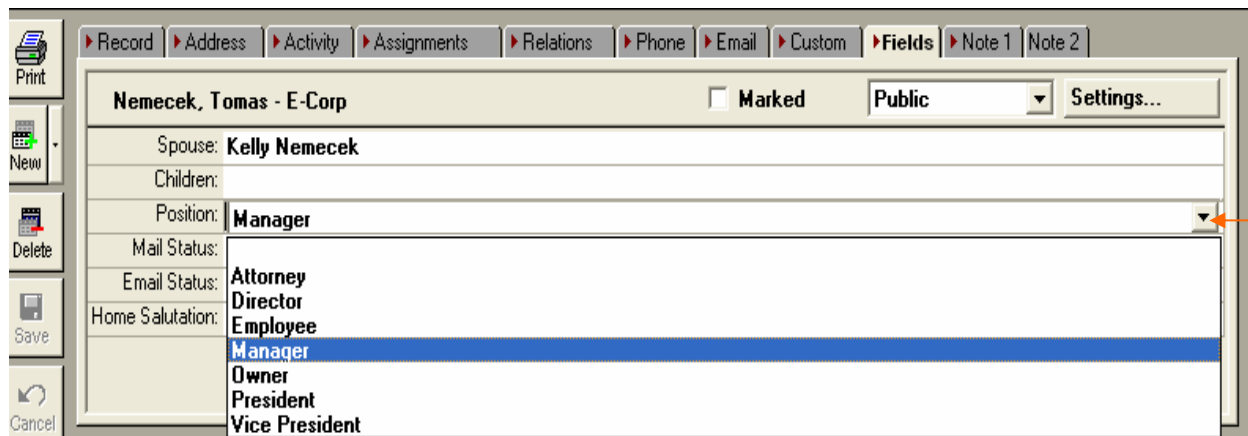
A Choice List enables users to create a list of options for entering data into a field. All user-created Fields can be assigned a Choice List. Other system fields can also be converted into a Choice List (E.g. Prefix, State, Title, Country, Suffix, etc.).

Custom Fields versus Fields

Both Fields and Custom Fields can be the object of a search. Custom Fields are indexed and can be used for sorting printouts and displays. The four text-only fields in the Custom tab can be assigned a Choice List; while all Fields can have Choice Lists.

Which Fields Have a Choice List?

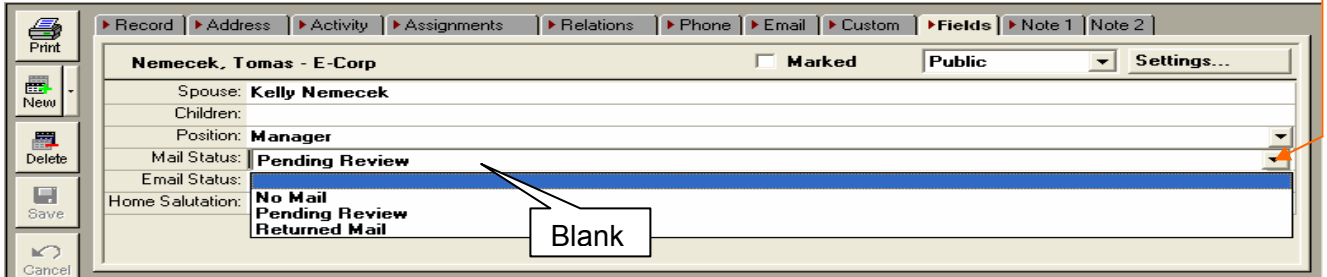
If a Choice List is assigned to a field, you will see a drop-down arrow in the far right-hand side of the field display.



Note: Date fields located in the Custom tab will also have this option; but in this case, the drop-down arrow will reveal a calendar for selecting the appropriate date.

Creating and Using a Field Choice List

Click on the drop-down arrow to view the available choices.



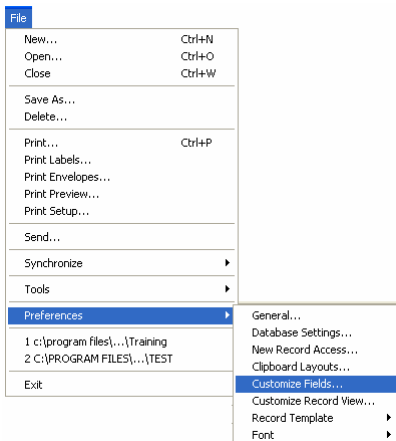
Position the cursor and press *Enter* to make a selection. As illustrated above, it is recommended that one of the choices be set as “blank” (the first choice). The “blank” becomes a valid selection, and indicates whether or not a field is applicable to a record. A “blank” also indicates whether or not a record has been classified.

In ContactEase, you can also search for “blank” fields.

If your Choice List is set to “Allow additional input”, you can add a custom choice for this record by simply typing in a new value. This value is now the assigned selection for this record; but does not add value to the Choice List. You can search for this value, but it will not automatically populate the Choice List.

The only way to add values to a Choice List is to access the Choice List function.

Adding a Choice List to a Field



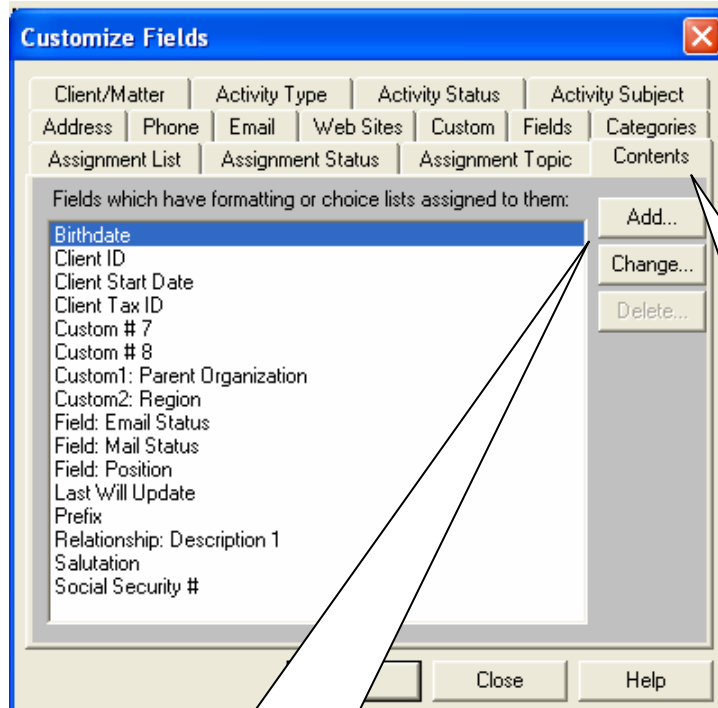
To do so, use the **File** Menu.

Select the **Preferences** option.

Then select **Customize Fields**.

Creating and Using a Field Choice List

This will open up the Customize Fields window where you can add and edit a variety of fields in ContactEase.



Step 1) Choice Lists are also known as Field Contents.

Click on the *Contents* tab where you can then choose to Add, Change, or Delete a Choice List. Fields that display in this listing already have a Choice List (numeric or date format option) assigned to them.

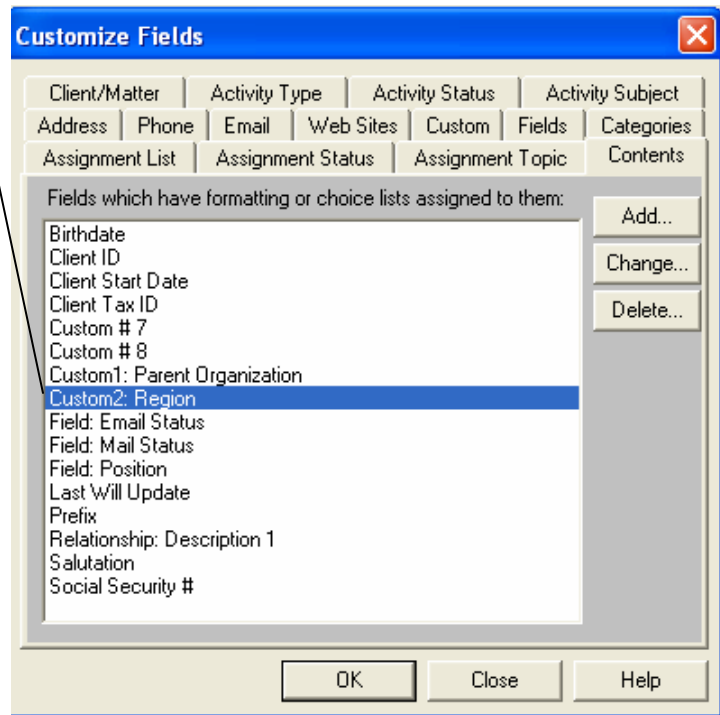
If you are editing values in an existing choice list, highlight that field and click the Change button. **See Step 2.**

If you want to create a new choice list and attach it to a field, click the *Add* button to reveal available Fields from which to choose. **Proceed to Step 3.**

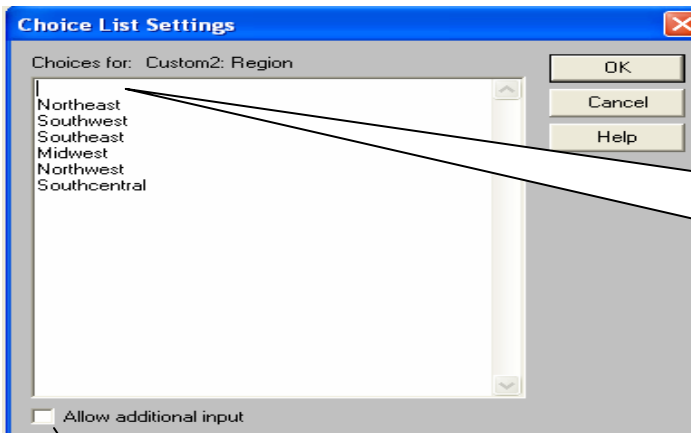
Creating and Using a Field Choice List

Step 2) Edit an existing choice list.

Highlight the Choice List you wish to modify and click *Change*. Fields (user fields) are preceded by the text Field. Other potential Choice List options, such as Title, Suffix, etc, are system fields and can also be assigned a Choice List if desired.



Step 3) Type in the value you wish to allow, and press *Enter* to drop to the next line. Repeat until all of the desired choices are entered, then press *OK*.



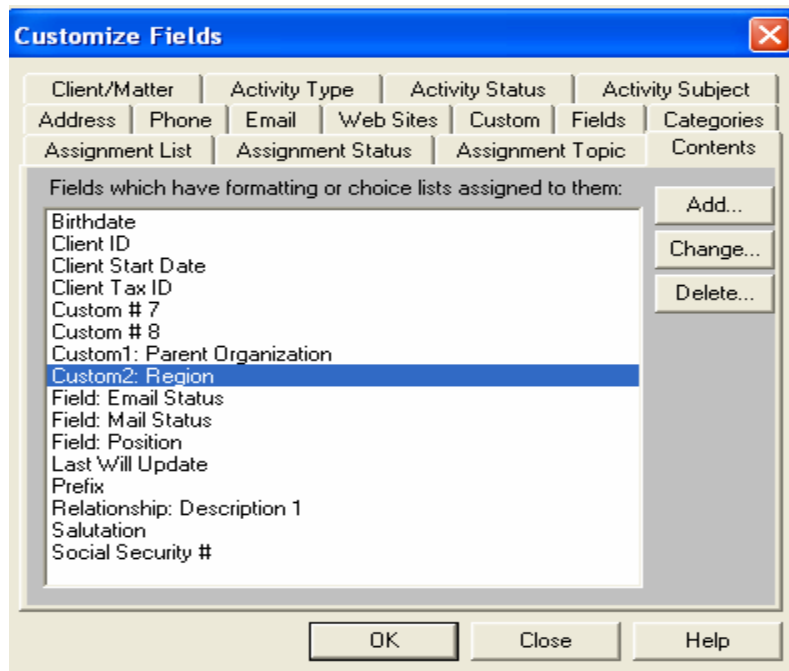
If "blank" is a valid selection, leave the **first** line blank. If blank is not an option then a user must enter a value if they click on this field.

Check this box if you wish to allow the operator to manually enter a value for this field. This option will NOT allow adding the value to the choice list but only allow for a non-choice value to be added for a record (not recommended). If not checked then only the values in this list (including blank) can be used to complete this field.

Creating and Using a Field Choice List

No matter what order you enter the choice values, ContactEase will rearrange them in alphabetical order when presenting them on the choice list for use.

Note: If you are converting an existing field to a Choice List you may see values in this display. The values from all records in the database already assigned to this field will automatically appear when building a new Choice List. Review these selections carefully to make sure they are what you want in the list (you may want to create a blank option as well – which must be the first value).



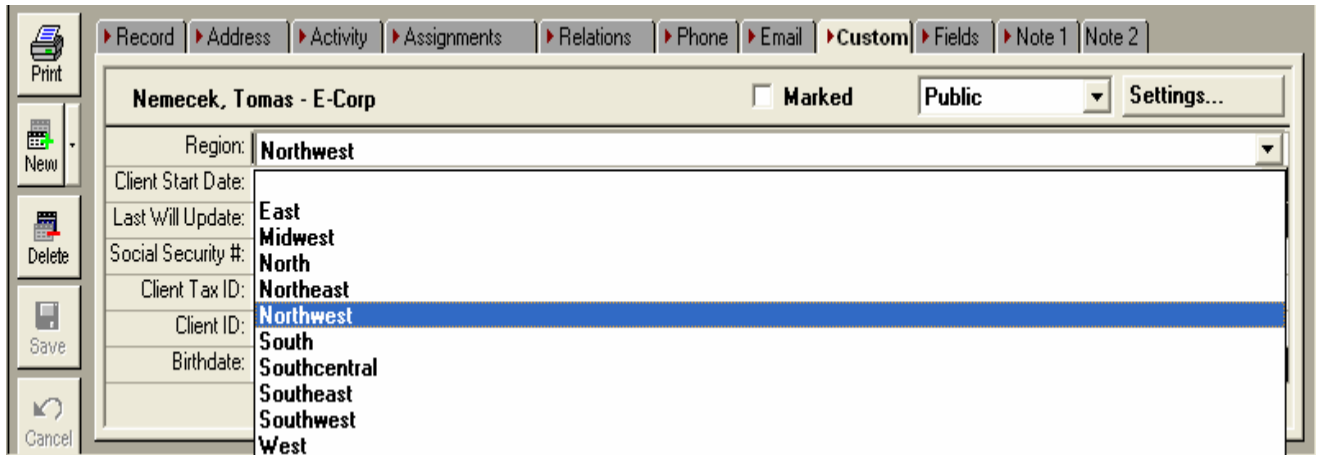
Once the Choice List is created, you will see your field in the Contents tab. You can now (or at any future time) edit the Choice values by clicking on the *Change* button, (see Step 2) or you can eliminate the Choice List for this field by clicking on the *Delete* button.

Note: Deleting a Choice List will not eliminate the values already established for a field. The previously assigned values still remain attached to a field, but the Choice List will no longer exist and the field becomes an input field.

Adding Choice List Values

If you wish to add a new choice (value) to an existing Choice List, simply click the *Change* button as described in [Step 2](#).

Using Choice List Values



Once a Choice List is created, you can assign values to records in the database. Using values from a Choice List ensures consistent input and more reliable database searches.

Note that the values appear in alphabetical order; this allows you to simply position into the field and type the first letter of the choice to advance to that option.

END OF HINT!