SedonaSetup - CM - Customer Custom Fields

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The fields that are activated will appear for data entry on the Customer Custom Fields form. Fields are activated by typing in a label in the text box to the right of the Custom Field that will be used. The data saved in these fields may be used for reporting purposes.

Here you may set up tables, which will provide the User with drop-down list of choices, and create fields formatted as money, or a date. You may also use text boxes or checkbox fields. You may also define whether a field is required. If a field is checked as required, the User setting up a new customer or modifying an existing customer will be required to make a selection or enter information into any required fields.

You also have the option of defining what words will appear on the Custom fields tab. This is entered in the Label field at the top of this setup form.

If you choose to set up any Table type fields you will need to set up the choices that you would like to appear in the drop down box, in the Custom Fields Table 1 (Customer), Custom Fields Table 2 (Customer) or Custom Fields Table 3 (Customer).

Only fields that have been assigned a name label will be available for data entry, otherwise these fields will be grayed-out on the data entry form.

Note: User permissions are required to be able to enter and/or edit information on the Custom Fields data entry form. Definitions of each field on this setup form are shown below.

These form definitions also apply to the Site and System Custom Fields setup.

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- Label: These are the words that will appear on the Customer Custom Fields tab. You may enter up to 49 characters for this field.

Tables Type Fields

Enter the words that will appear to the left of each table field on the Customer Custom Fields form. You may enter up to 49 characters to appear to the left of this field, however due to space limitations on the Custom Fields forms, only a maximum of 23 characters will be displayed. Once you assign a label to one or multiple Table type fields, those fields will be activated for use during data entry, however, you must setup the choices that will be available to the Users in the Custom Field Table 1, 2, or 3 setup tables.

Money Type Fields

Information entered into these fields during data entry will be display in a money format.

Enter the words that will appear to the left of each Money fields on the Customer Custom Fields form. You may enter up to 49 characters for the field label that will be displayed to the left of this field, however due to space limitations on the Custom Fields forms, only a maximum of 23 characters will be displayed. Once you assign a label to one or multiple Money type fields, those fields will be activated for use during data entry.

Text Type Fields

These are free-form text fields where the user may enter any alpha numeric information into this field during data entry. The maximum number of characters that may be entered during data entry is limited to 39.

Enter the words that will appear to the left of each Text fields on the Customer Custom Fields form. You may enter up to 49 characters for the field label that will be displayed to the left of this field, however due to space limitations on the Custom Fields forms, only a maximum of 23 characters will be displayed. Once you assign a label to one or multiple Text type fields, those fields will be activated for use during data entry.

Check Box Type Fields

This type of field is typically used for answering questions that require a Yes or No answer. Enter the words that will appear to the left ofe each Check Box type field. You may enter up to 49 characters for the field label that will be displayed to the left of this field, however due to space limitations on the Custom Fields forms, only a maximum of 23 characters will be displayed. Once you assign a label to one or multiple Check Box type fields, those fields will be activated for use during data entry.

Date Type Fields

Information entered into these fields will be saved and displayed in a date format and also provide a calendar icon to the right of the field. You may enter up to 49 characters for the field label that will be displayed to the left of this field, however due to space limitations on the Custom Fields forms, only a maximum of 23 characters will be displayed. Once you assign a label to one or multiple Date type fields, those fields will be activated for use during data entry.