SedonaSetup - SM - Prospect User Defined Setup

The fields on this form are used on the Qualifications form for each Prospect.

You may define the name and use of any field depending on the type of information that is important for your company regarding the Prospect. For each field that you will use, in the text box to the right of each field you will enter what label will display next to that field on the Qualifications form.

- Text fields - There are 10 free-form text fields available which will accommodate up to 30 characters of text.
- Tables – 4 User Defined tables are available where you make create your own list of values that will appear on a drop-down list from which the User will select. Follow the link for setup instructions for the Prospect User Defined Tables.
- Date Fields – 4 fields are available that will be formatted and stored as a date.
- Check Boxes – 10 checkbox fields are available; these are usually Yes/No questions.
- Money Fields – 4 fields are available that will be formatted and stored in a money format.