

SedonaSetup - JM - Job Custom Fields Setup

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The fields that are activated will appear for data entry on the Job Custom Fields form which is a button on the Job Toolbar.

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.

You may set up tables and provide the User with drop-down list of choices, money, text, date, or check box fields. You may also define whether a field is required. If a field is checked as required, the User setting up a new Job or modifying an existing Job will be required to make a selection or enter information into all required fields. Y

ou also have the option of defining what words will appear on the Custom fields button which appears on the Job toolbar. This is entered in the Label field at the top of this setup form.

If you choose to set up 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 (Job), Custom Fields Table 2 (Job), Custom Fields Table 3 (Job), or Custom Fields Table 4 (Job).

If your company is using QuoteWerks, your company may map the custom fields within QuoteWerks into the SedonaOffice Job Custom Fields. When a Job is created from a QuoteWerks Quote, any information entered into the mapped custom fields in the quote will populate the Job Custom Fields in SedonaOffice Job record.

Note: The Checkbox 1 field is reserved by SedonaOffice to indicate when a commission has been paid to the Salesperson - do not re-label this field.

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