

JOB CUSTOM FIELDS

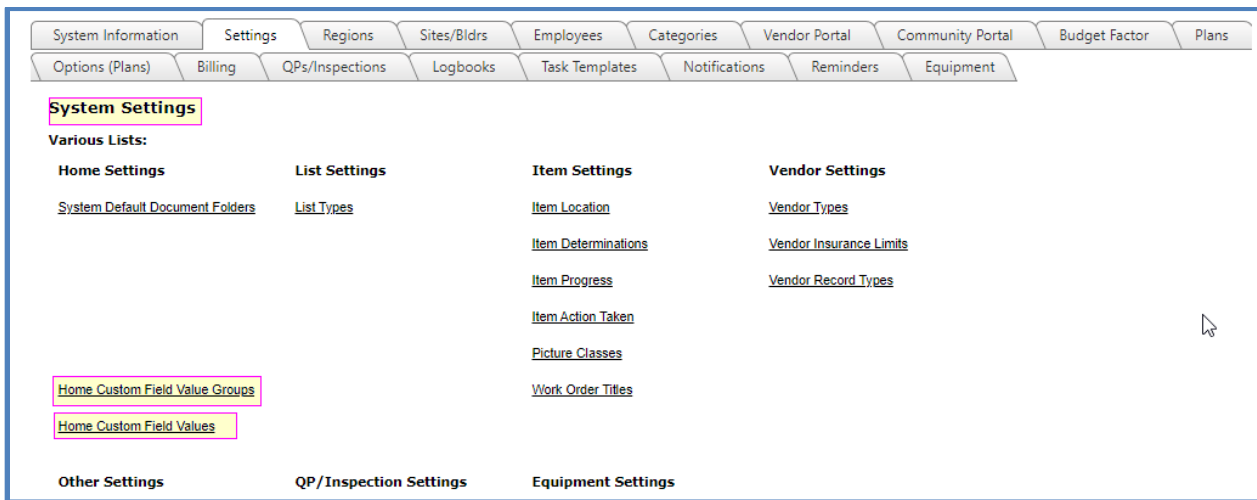
Home* Custom Fields

**Terminology of 'Home' used in this document and examples may be shown in your database as Job, Lot, Unit, or any other term you may have assigned to the individual properties in your database.*

Settings > System Setup > Settings

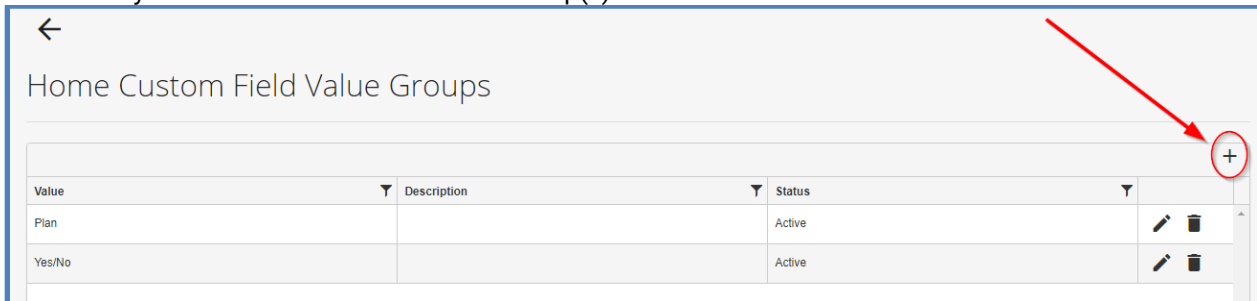
Home Custom Field Value Groups

Home Custom Field Values



The screenshot shows the 'Settings' menu with various options. The 'System Settings' section is highlighted in pink. Under 'Various Lists', there are four columns of settings: Home Settings, List Settings, Item Settings, and Vendor Settings. 'Home Custom Field Value Groups' and 'Home Custom Field Values' are highlighted in pink in the Home Settings column.

To create your Custom Field Value Groups, simply click on the setting to move to the screen shown below then select the + icon to add your Home Custom Field Value Group(s):

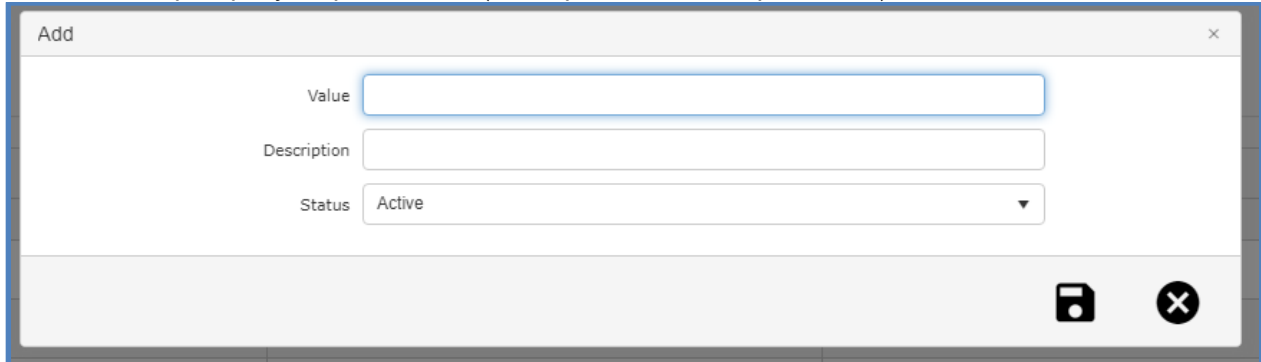


The screenshot shows the 'Home Custom Field Value Groups' screen. A red arrow points to a '+' icon in the top right corner, indicating where to click to add a new group. The screen displays a table with columns for Value, Description, and Status. The table contains two rows: 'Plan' and 'Yes/No', both with a status of 'Active'.

Value	Description	Status
Plan		Active
Yes/No		Active

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Add your Value Group as per your preferences (Description is not a required field):

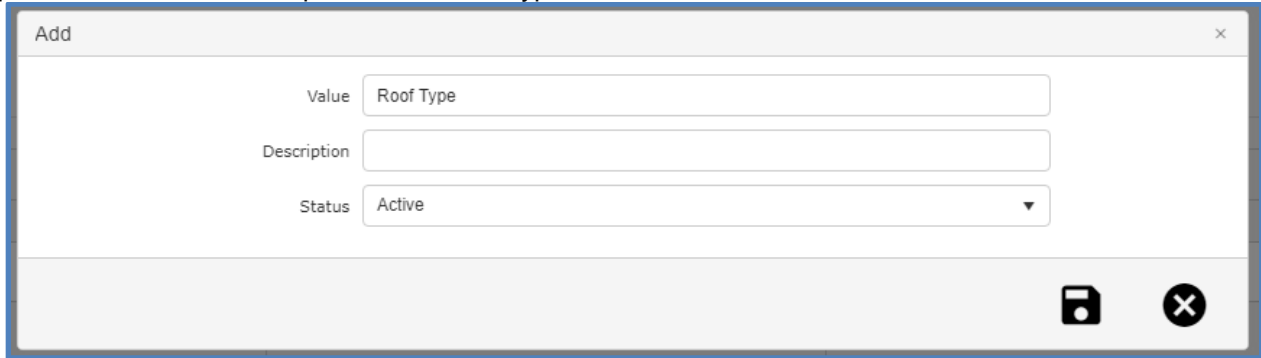


Value

Description

Status Active ▼

Example to create a Value Group for various roof types:

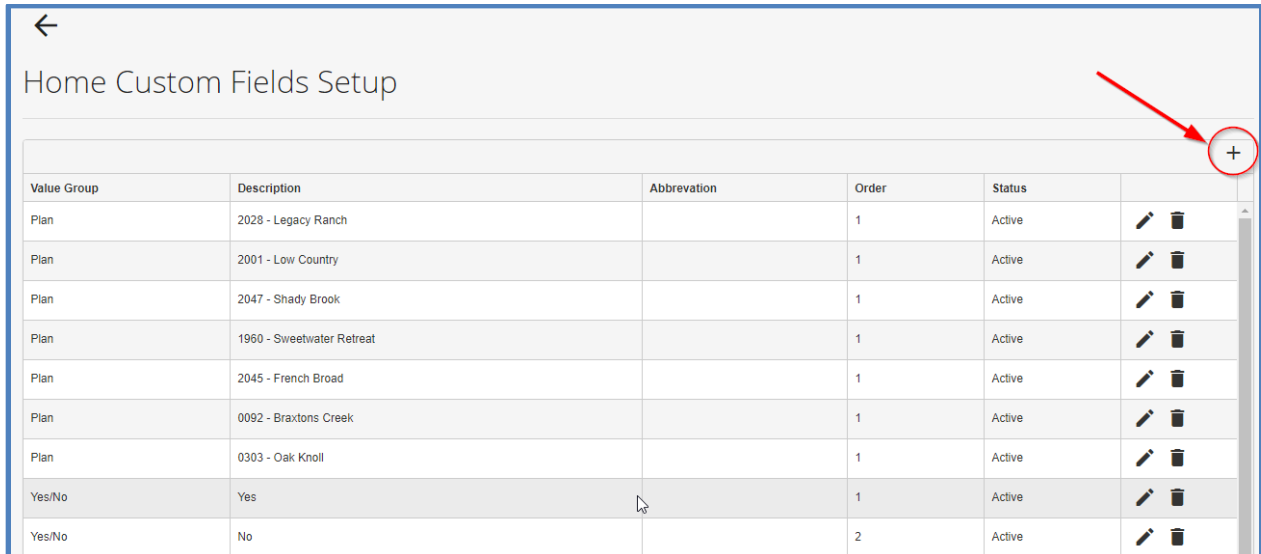


Value

Description

Status Active ▼

Return to the Settings Screen and select the Home Custom Field Values setting then click on the + icon to add your values:

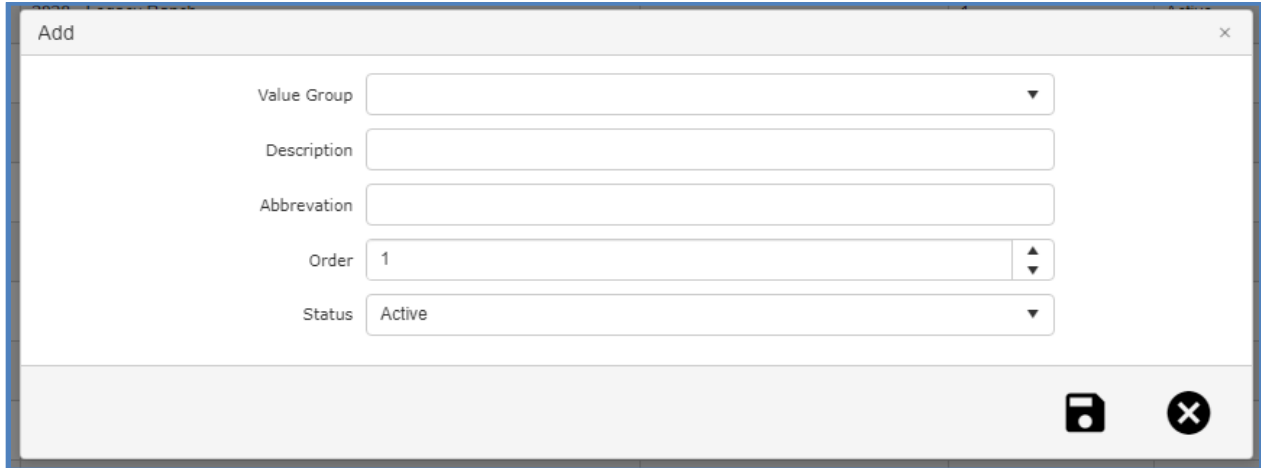


Home Custom Fields Setup

Value Group	Description	Abbreviation	Order	Status	
Plan	2028 - Legacy Ranch		1	Active	
Plan	2001 - Low Country		1	Active	
Plan	2047 - Shady Brook		1	Active	
Plan	1960 - Sweetwater Retreat		1	Active	
Plan	2045 - French Broad		1	Active	
Plan	0092 - Braxtons Creek		1	Active	
Plan	0303 - Oak Knoll		1	Active	
Yes/No	Yes		1	Active	
Yes/No	No		2	Active	

JOB CUSTOM FIELDS

Add your individual Values:

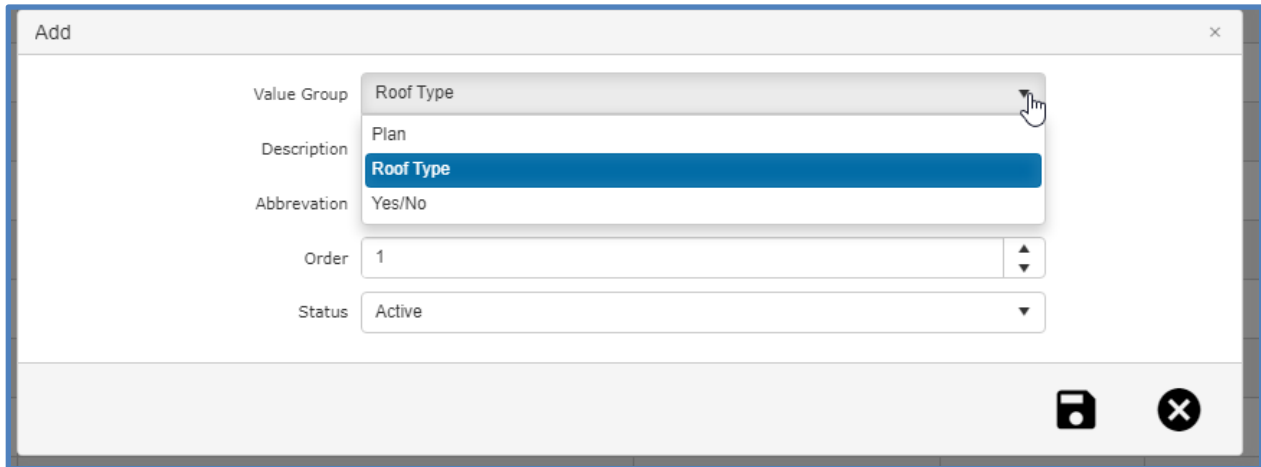


The 'Add' dialog box contains the following fields:

- Value Group: [Empty dropdown]
- Description: [Empty text box]
- Abbreviation: [Empty text box]
- Order: 1 [Spinners]
- Status: Active [Dropdown]

Buttons: Save (floppy disk icon), Close (X icon)

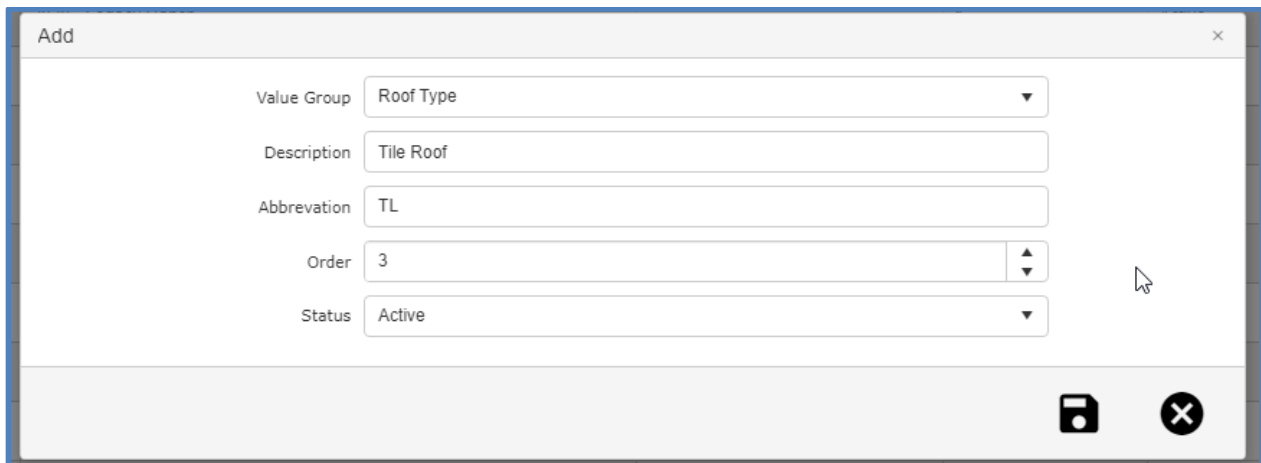
Example - To add a *Value* to the new **Roof Type** Value Group:



The 'Add' dialog box shows the 'Value Group' dropdown menu open with the following options:

- Roof Type (highlighted)
- Plan
- Roof Type
- Yes/No

Other fields are the same as in the previous screenshot.























The 'Add' dialog box now has the following values:

- Value Group: Roof Type
- Description: Tile Roof
- Abbreviation: TL
- Order: 3
- Status: Active

Buttons: Save (floppy disk icon), Close (X icon)

JOB CUSTOM FIELDS

The new Value Group of Roof Type now includes three (3) choices which have been assigned a specific order to be shown in the dropdown menu:

Value Group	Description	Abbreviation	Order	Status	
Plan	2028 - Legacy Ranch		1	Active	 
Plan	2001 - Low Country		1	Active	 
Plan	2047 - Shady Brook		1	Active	 
Plan	1960 - Sweetwater Retreat		1	Active	 
Plan	2045 - French Broad		1	Active	 
Plan	0092 - Braxtons Creek		1	Active	 
Plan	0303 - Oak Knoll		1	Active	 
Roof Type	Shingle	SH	1	Active	 
Roof Type	Aluminum	AL	2	Active	 
Roof Type	Tile Roof	TL	3	Active	 



Now that your Value Groups and Values have been established, you will move to:

Settings > Site Setup > Settings > Terminology and scroll down until you see the Job Custom Group field. Label this group as you see fit then label each custom field you want to include in your individual Home Detail Page (see example of 7 custom fields below) and SAVE. You may add and define up to twenty (20) Job Custom fields.

Site/Builder Detail
Settings
Notifications
Vendor Ratings
Reporting

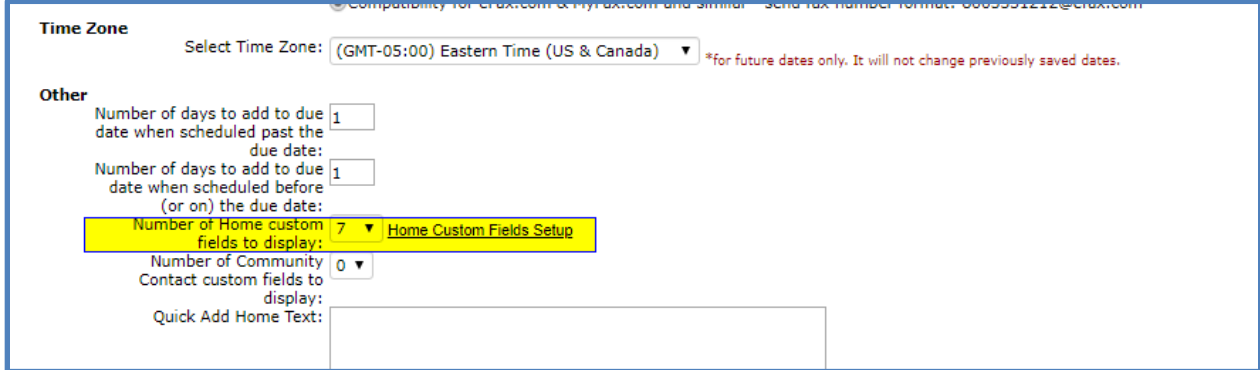
Terminology
Home Portal
Email Templates
Text Templates
Task Tem

Term	Singular	Max	Plural
Owner:	<input type="text" value="Owner"/>	15	<input type="text" value="Owners"/>
Job Custom Group:	<input type="text" value="Additional Info"/>	15	
Job Custom 1:	<input type="text" value="Time to Call"/>	15	
Job Custom 2:	<input type="text" value="Pets"/>	15	
Job Custom 3:	<input type="text" value="Lockbox/Code"/>	15	
Job Custom 4:	<input type="text" value="Spec Needs"/>	15	
Job Custom 5:	<input type="text" value="Plan"/>	15	
Job Custom 6:	<input type="text" value="Rental Property"/>	15	
Job Custom 7:	<input type="text" value="Occupied"/>	15	
Job Custom 8:	<input type="text" value="Custom8"/>	15	
Job Custom 9:	<input type="text" value="Custom9"/>	15	

JOB CUSTOM FIELDS

Return to **Settings > Site Setup > Settings** and scroll down the page until you see
 Number of Home custom
 fields to display: (See Screenshot below)



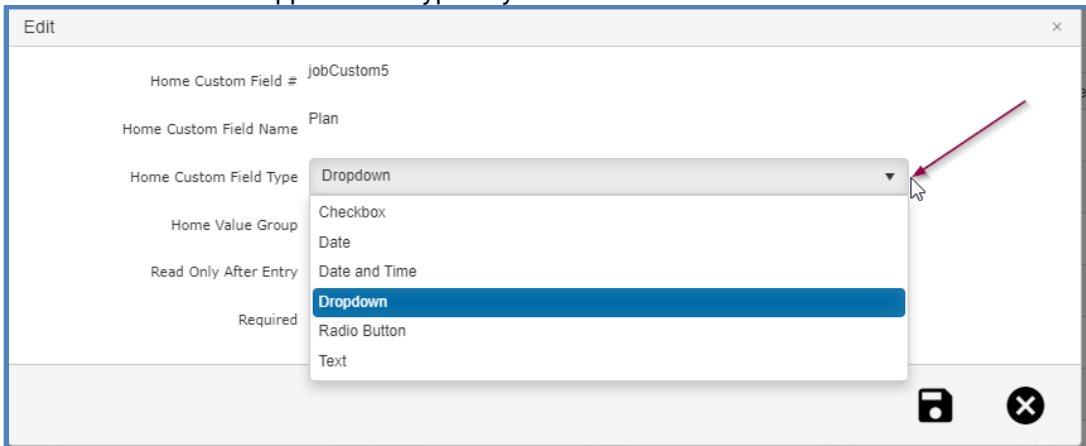
Time Zone
 Select Time Zone: (GMT-05:00) Eastern Time (US & Canada) *for future dates only. It will not change previously saved dates.

Other
 Number of days to add to due date when scheduled past the due date: 1
 Number of days to add to due date when scheduled before (or on) the due date: 1
 Number of Home custom fields to display: 7 [Home Custom Fields Setup](#)
 Number of Community Contact custom fields to display: 0
 Quick Add Home Text:

Add the number of Custom Fields you have labeled and would like to display on your Job/Home Detail page for each property then click on the [Home Custom Fields Setup](#). This is where you will determine how each Custom Field will be displayed:

Home Custom Field #	Home Custom Field Name	Home Custom Field Type	Home Value Group	Read Only After Entry	Required	
jobCustom1	Time to Call	Text		No	No	
jobCustom2	Pets	Text		No	No	
jobCustom3	Lockbox/Code	Text		No	No	
jobCustom4	Spec Needs	Text		No	No	
jobCustom5	Plan	Dropdown	Plan	Yes	Yes	
jobCustom6	Rental Property	Radio Button	Yes/No	No	Yes	
jobCustom7	Occupied	Radio Button	Yes/No	No	Yes	

To change the format of the display, select the pencil icon to the right of the screen then make your selections, use the available dropdown menu to select the appearance Type of your choice:



Edit

Home Custom Field # jobCustom5

Home Custom Field Name Plan

Home Custom Field Type **Dropdown**

Home Value Group

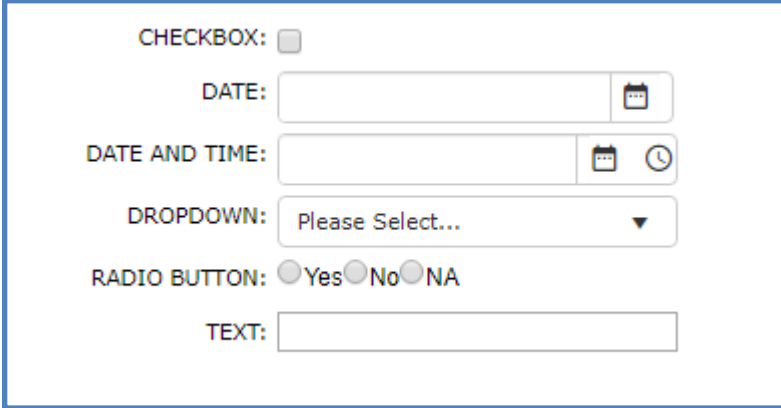
Read Only After Entry

Required


Dropdown
 Checkbox
 Date
 Date and Time
Dropdown
 Radio Button
 Text



JOB CUSTOM FIELDS


Home Custom Field Types will appear on the Home Detail screen as shown below (fields shown here have been labeled for demonstrative purposes):



CHECKBOX:

DATE: 

DATE AND TIME:  

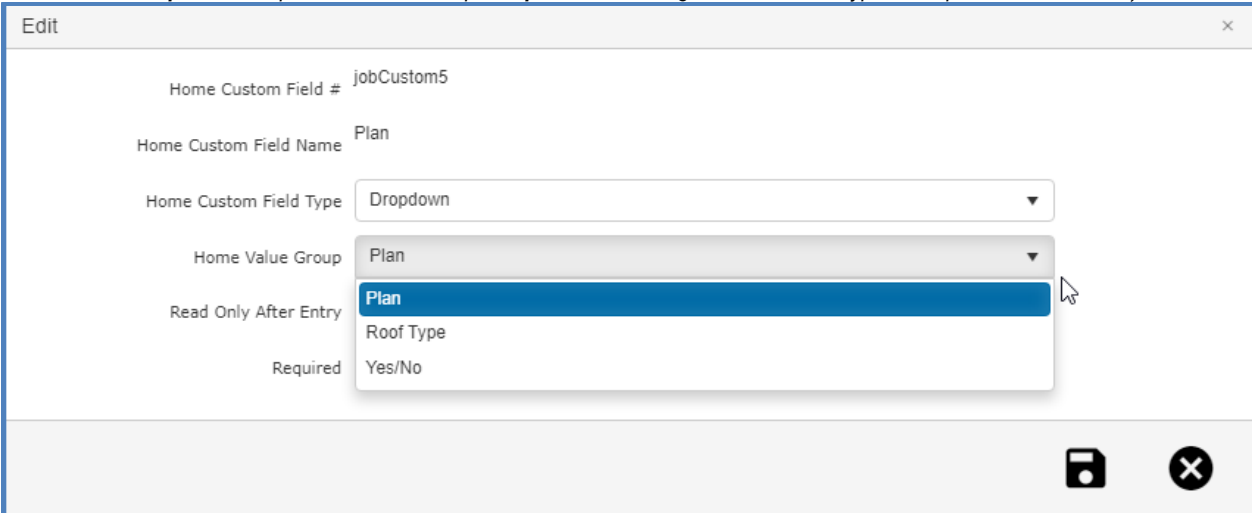
DROPDOWN: Please Select... 

RADIO BUTTON: Yes No NA

TEXT:

If this Custom Field should be assigned to a Value Group, select the Group

(custom fields are not **required** to be part of a Value Group **except** when selecting a Custom Field Type of Dropdown or Radio Dial):



Home Custom Field # jobCustom5

Home Custom Field Name Plan

Home Custom Field Type Dropdown


Home Value Group Plan

Read Only After Entry Plan

Required Yes/No

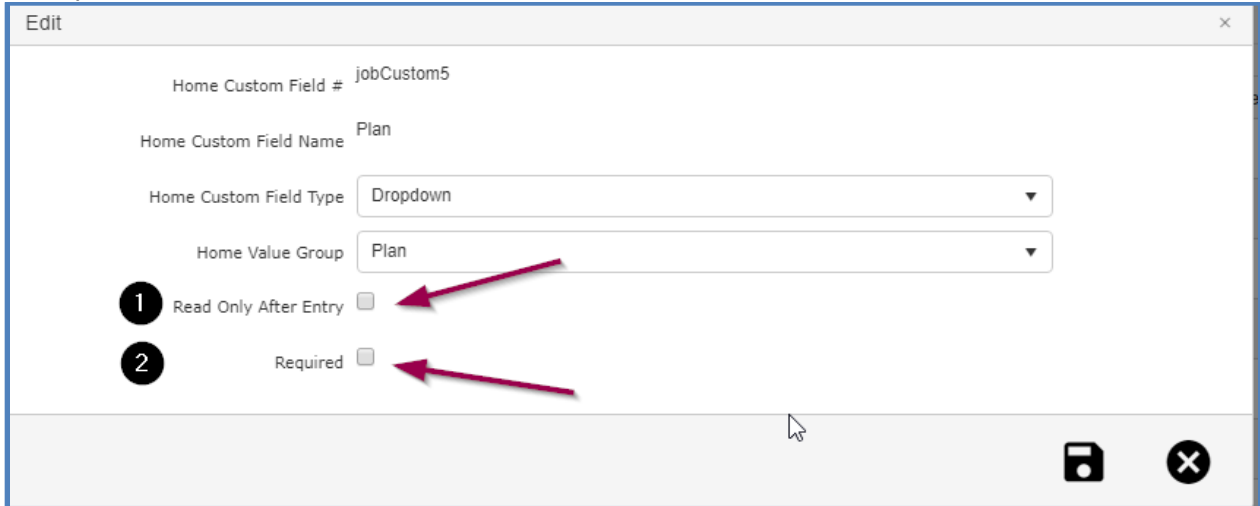
Plan

Roof Type

Save 

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Additional Options:



Home Custom Field # jobCustom5

Home Custom Field Name Plan

Home Custom Field Type Dropdown

Home Value Group Plan

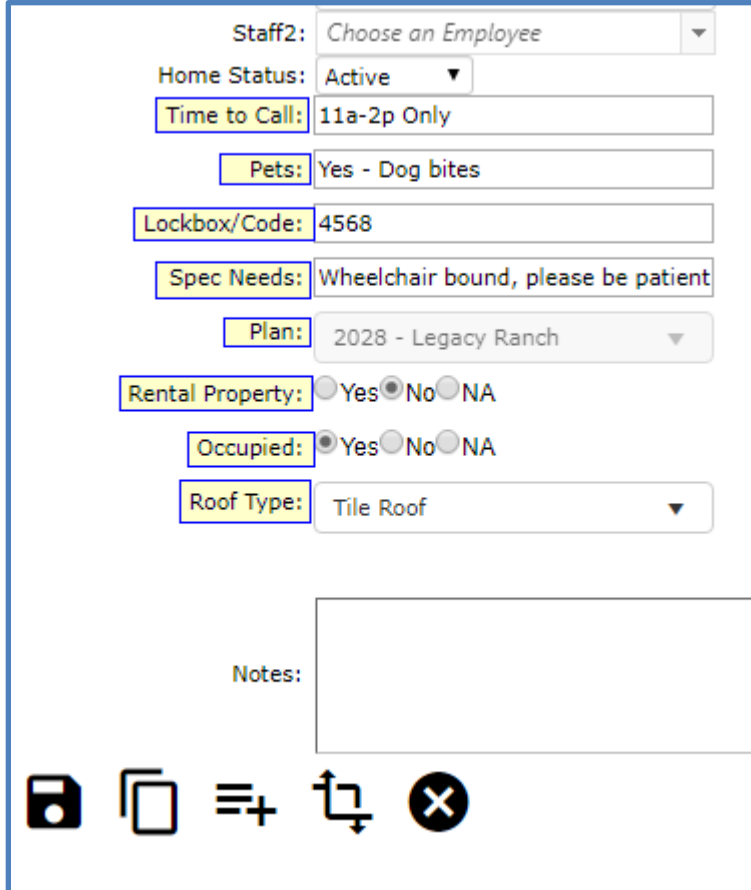
1 Read Only After Entry

2 Required

- 1 Check here if you would like to lock this Custom Field down so that it cannot be changed after it is entered/saved in the Home Detail screen.
- 2 Check here if you would like this to be a **required** field for all Home records.

JOB CUSTOM FIELDS

After Creating your Home Custom Fields, they will appear at the Home Detail Page as in this example of eight custom fields.



Staff2: Choose an Employee

Home Status: Active

Time to Call: 11a-2p Only

Pets: Yes - Dog bites

Lockbox/Code: 4568

Spec Needs: Wheelchair bound, please be patient

Plan: 2028 - Legacy Ranch

Rental Property: Yes No NA

Occupied: Yes No NA

Roof Type: Tile Roof

Notes:

Icons: Save, Copy, Add, Share, Close

You can now go to **Settings > Site Setup > Reporting > (customize fields)** to assign which of these Custom Fields, if any, you would like shown on your Work Orders.