

Extended System User Defined Fields in SedonaOffice

05/31/2024 8:41 am EDT

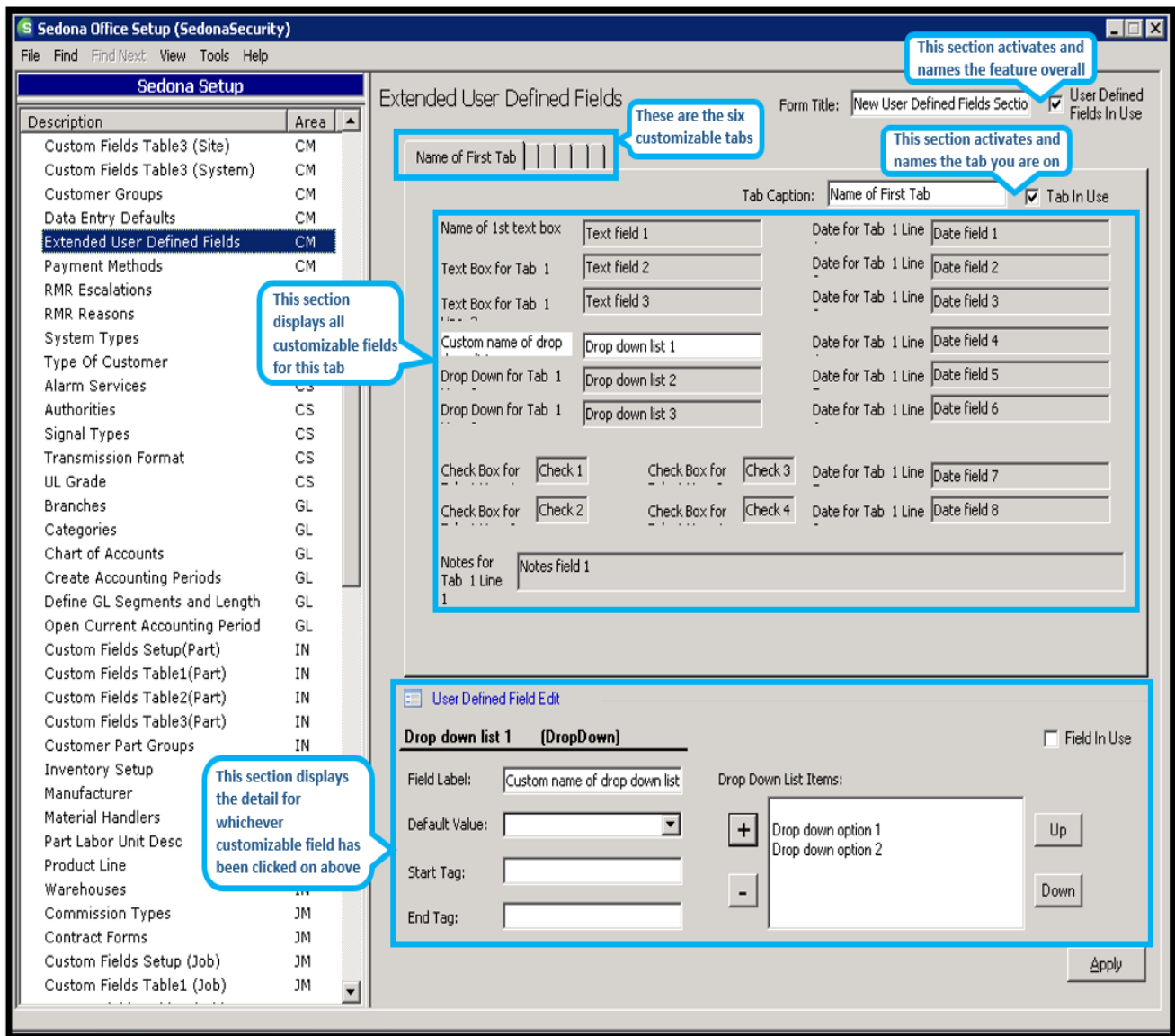
Extended System User Defined Fields

In version 5.7.44 of SedonaOffice a new detailed user defined section has been added to systems. Once setup, users have the option of using six different completely customizable tabs and the customizable fields within those tabs.

Setup

This new feature includes six customizable tabs and eleven or more customizable fields within each of those tabs. The feature itself, the tabs, and each field must be activated separately. This allows you to activate and display only the fields you wish to use. To begin setup go to SedonaSetup - Extended System User Defined Fields.

A breakdown of the fields in this setup table:



Within this setup table the following types of fields are available for customization:

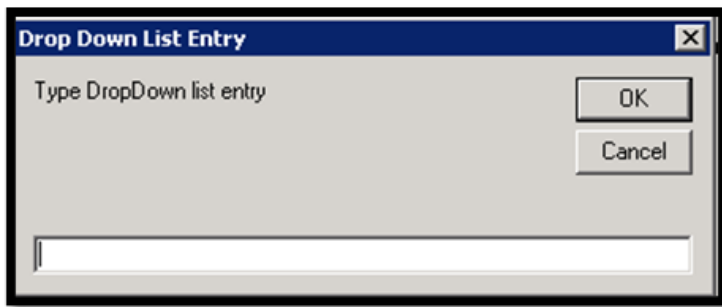
- Check Boxes
- Date entry fields
- Drop downs (for selecting one entry from a list)
- Money entry fields (for entering dollar values)
- Note entry fields
- Text Boxes (for short bits of free form text)

To begin:

1. Check the "User Defined Fields In Use" box in the very top right corner and label this feature by entering the name of your choice in the "Form Title" field.
2. Click through the six tabs to see which of them fit your needs. When you find a tab you wish to activate check the

"Tab In Use" box and enter a name for the tab in the "Tab Caption" field.

3. Click on a field on your tab that you wish to activate. Details for that field will appear in the bottom portion of the screen.
 4. Enter a name for the field under "Field Label"
 5. If you want the field to have a default, enter one in the "Default Value" field
 6. Leave the Start Tag and End Tag fields blank. These fields are for future functionality not yet implemented
 7. If your chosen field is a drop down, enter all possible drop down options under "Drop Down List Items"
- Select the + sign. The following pop up box will appear:

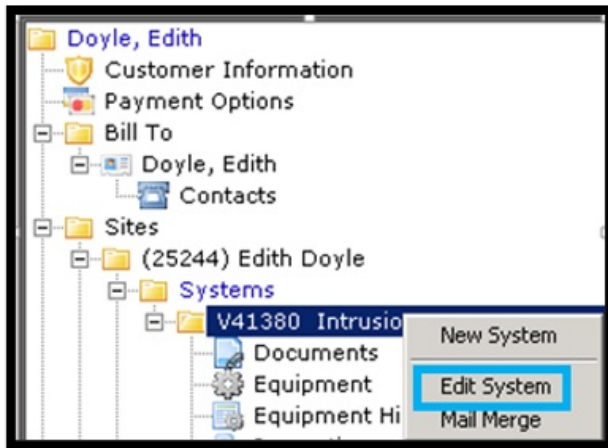


- Enter the drop down option and click Okay
 - You can change the order of the drop down options by selecting an option and using the Up and Down buttons at right to adjust
 - You can remove drop down options by selecting the option and clicking the (-) button at left
8. Select Apply
 9. You may return at any time to activate more fields and tabs. You can inactivate fields and tabs by unchecking the associated Field/Tab In Use boxes.

Using the Extended User Defined Fields

To view and edit the extended user defined fields:

1. Open a customer
2. Expand on one of the customer's sites and then expand Systems so you can see the individual system names
3. Highlight a system, right click, and select edit



4. Select the U/D Fields button at the bottom (U/D stands for User Defined)
5. A window will pop up with all of your activated custom tabs and fields listed
6. To use these fields simply enter the appropriate info and save