

How to Add Custom Fields to Jobs

10/18/2024 10:43 am EDT

The Job has a specific area called Custom Fields for information that companies want access to but there's nowhere else for it to go, much like the presence of Custom Fields on the Customer.

Job	Customer 48960	Site
Job Number 4298	Secure U	Secure Uni
Job Type ACC-Comm	Ashlee Simmons	1122
Job Status Install Equipment	1122	Detroit, MI 48272
System 48960 Access	Detroit, MI 48272	
Labor Units 0.0 (0.0 Used)	(734) 555-5555	

Custom Fields	
Text	
Contact Name	Tom Riddle
Alarm Code	
SIM	numbers
Cell Vendor	Verizon
Field 5	
Field 6	
Field 7	
Field 8	
Money	
Amount 1	0.00
Amount 2	0.00
Tables	
Closing Job	
Table 2	
Table 3	
Table 4	
Date	
Date 1	
Date 2	
Check Boxes	
Job Commission Paid*	☐
Closing job	☐
Choice 3	☐
Choice 4	☐
Choice 5	☐

Apply

To add the necessary fields go to SedonaSetup > Custom Fields Setup (Job) in the JM area.

Sedona Setup	
Description	Area
Warehouses	IN
Commission Types	JM
Contract Forms	JM
Custom Fields Setup (Job)	JM
Custom Fields Table1 (Job)	JM

In the image below, there are corresponding fields to what are in the Custom Fields window of the Job.

Custom Fields (Job Level)

Label: Custom Fields Required

Tables Required

Table 1: Closing Job ☐

Table 2: ☐

Table 3: ☐

Table 4: ☐

Check Boxes Required

Check 1: Job Commission Paid*

Check 2: Closing job

Check 3: Check Box 3

Check 4: Check Box 4

Check 5: Check Box 5

Date Required

Date 1: Date 1 ☐

Date 2: Date 2 ☐

Money Required

Label 1: Money Label 1 ☐

Label 2: Money Label 2 ☐

Text Required

Text 1: Contact Name ☐

Text 2: Alarm Code ☐

Text 3: SIM ☐

Text 4: Cell Vendor ☐

Text 5: User Text 5 ☐

Text 6: User Text 6 ☐

Text 7: User Text 7 ☐

Text 8: User Text 8 ☐

Text 9: User Text 9 ☐

Text 10: User Text 10 ☐

Text 11: User Text 11 ☐

Text 12: User Text 12 ☐

Text 13: User Text 13 ☐

Text 14: User Text 14 ☐

Text 15: User Text 15 ☐

Text 16: User Text 16 ☐

After adding Text to the Text area custom fields, click apply to save and they will appear in the Job.

If text is added to the Tables fields, go to the corresponding Custom Fields table.

Tables Required

Table 1: Closing Job ☐

Table 2: Test info ☐

Table 3: ☐

Table 4: ☐

Sedona Setup	
Description	Area
Warehouses	IN
Commission Types	JM
Contract Forms	JM
Custom Fields Setup (Job)	JM
Custom Fields Table1 (Job)	JM
Custom Fields Table2 (Job)	JM
Custom Fields Table3 (Job)	JM

Add new options by clicking new in the table window.

Test info

Test info

Test info	Description	Inactive
Example 1	Example 1	N

☐ Include Inactive

Test info Edit

Test info

Example 2

Description

☐ Inactive

Apply

New

Delete

Click apply to save.

Back in the Job Custom Fields window, the tables dropdown menus will have the newly added options.

Custom Fields

Text

Contact Name

dddd

Field 9

Alarm Code

Field 10

SIM

112233

Field 11

Cell Vendor

Example

Field 12

Example 1

Field 13

Field 6

Field 14

Field 7

Field 15

Field 8

Field 16

Money

Amount 1

0.00

Date

Amount 2

0.00

Date 2

Tables

Closing Job

Check Boxes

Job Commission Paid*

☐

Test info

Closing job

☐

Table 3

User Defined 2

Description

Table 4

Example 1

Example 1

Example 2

Example 2

Example 3

Example 3

Apply

