

Setting up Text User Fields

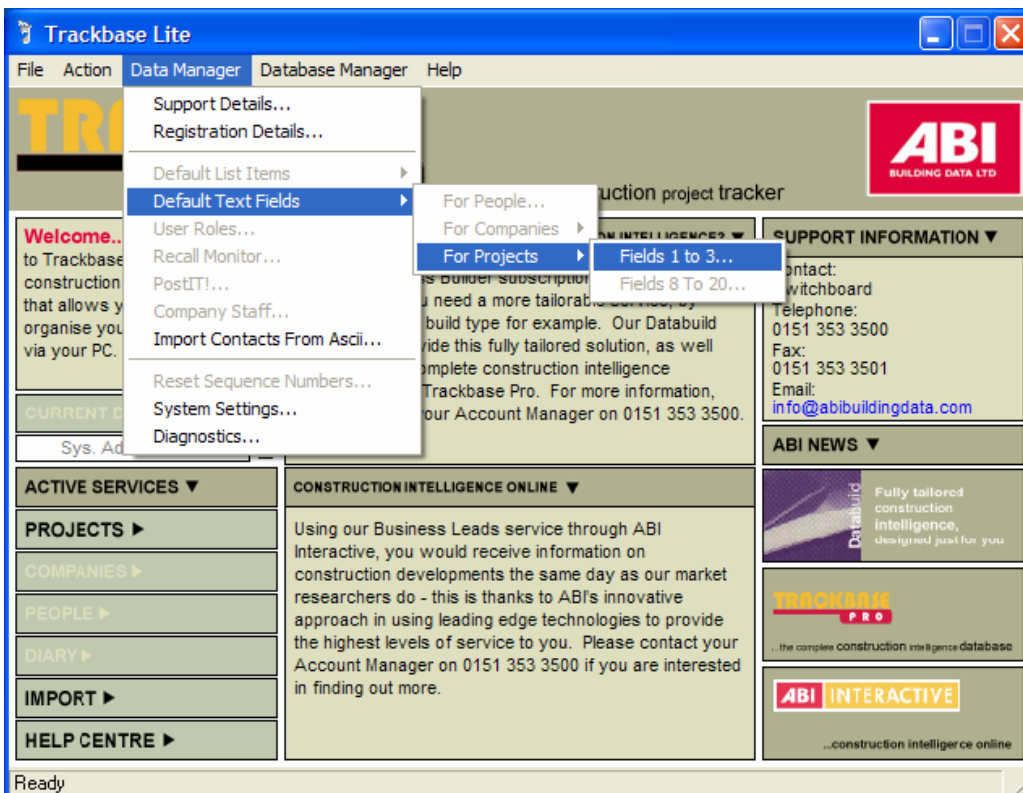
Text User Fields allow you to group different types of projects together under your own criteria.

For example you may be a small business with three sales representatives on the road. Each week you will go through the new projects on your Trackbase Lite system and allocate the projects to your reps depending on who is best suited to deal with the individual projects.

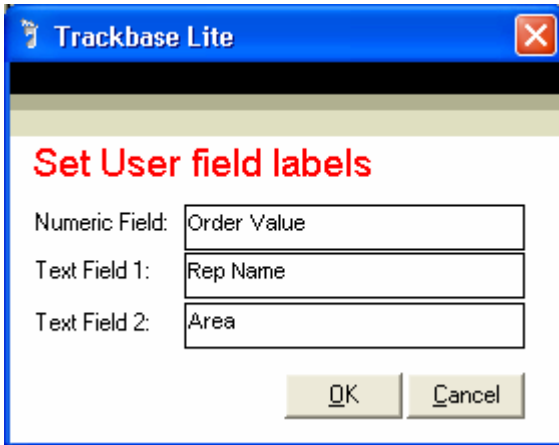
I am going to divide projects up in the following manner:

- Projects in the North of England go to Daisy
- Projects in the South of England go to Tim
- Projects in Scotland go to Marsha

As we are dividing our projects based on the most suitable rep, we first need to set up our User Fields. On the front screen of Trackbase Lite go to Data Manager, Default Text Fields, For Projects, Fields 1 to 3... and click to select.



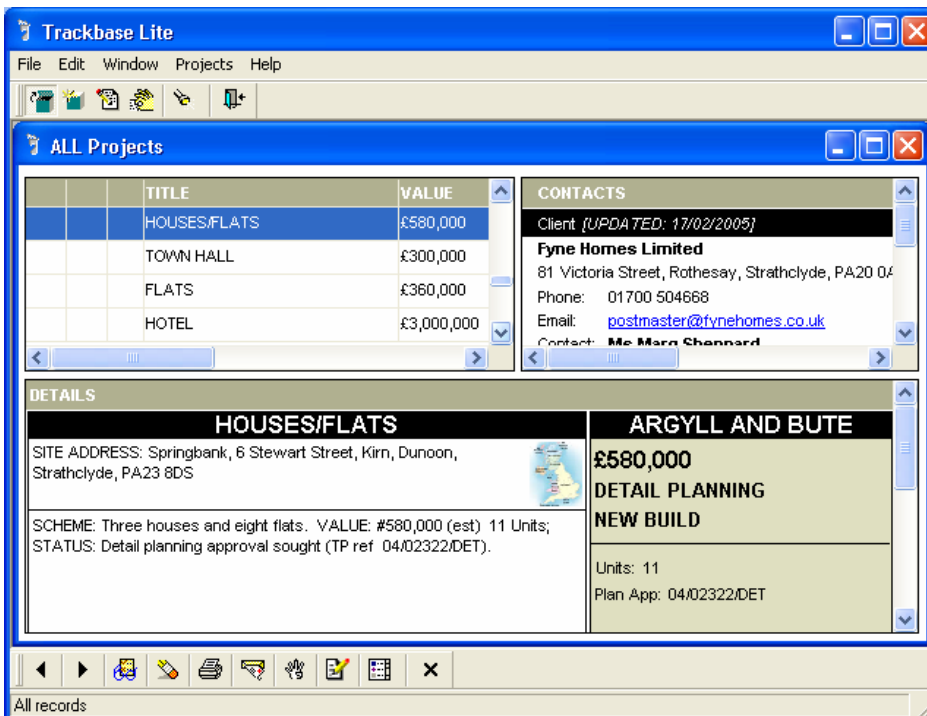
This will open a separate window where you can see the titles of the User Fields. At present my fields are the default fields suggested by Trackbase Lite. To change these you can just overtype the text.




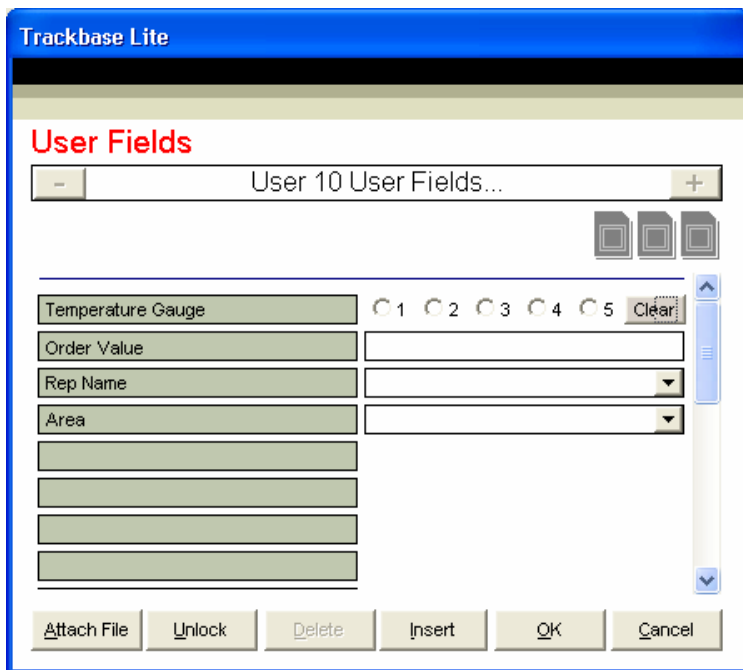
Once you have made any necessary changes to the titles of the User Fields, click on 'OK' to close the window and save your changes.

Once you have set up the details of the Text User Fields, you can open the project screen and use these details to link projects together.

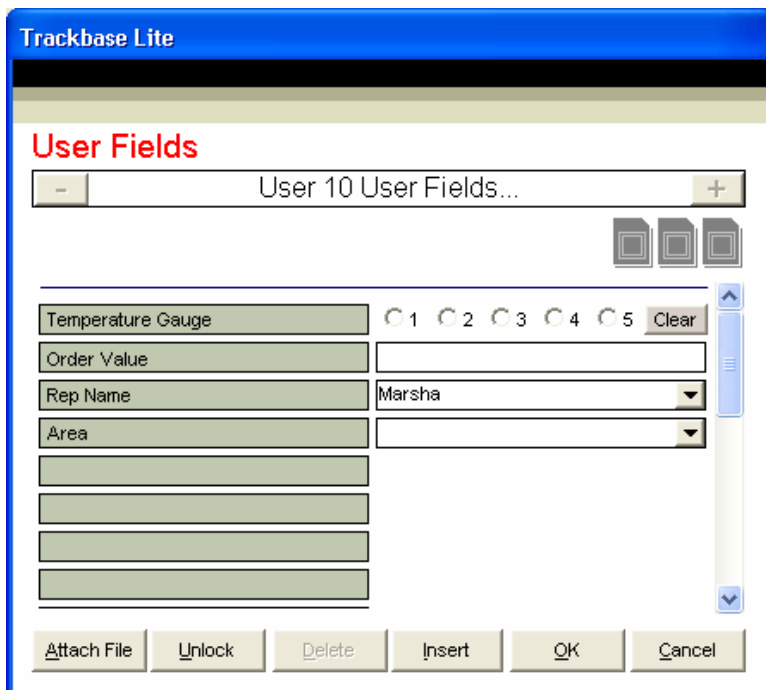
A project from my database is shown below:



This project is in Scotland. To 'Tag' this project as Marsha's we click on the Project User Field button  on the bottom toolbar. This opens the window shown below.



Type in the Reps name. Click on 'OK' to save these details.



This project is now 'tagged' as Marsha's. You can now work through your database 'tagging' individual projects to each sales rep.