

Setting up Text User Fields

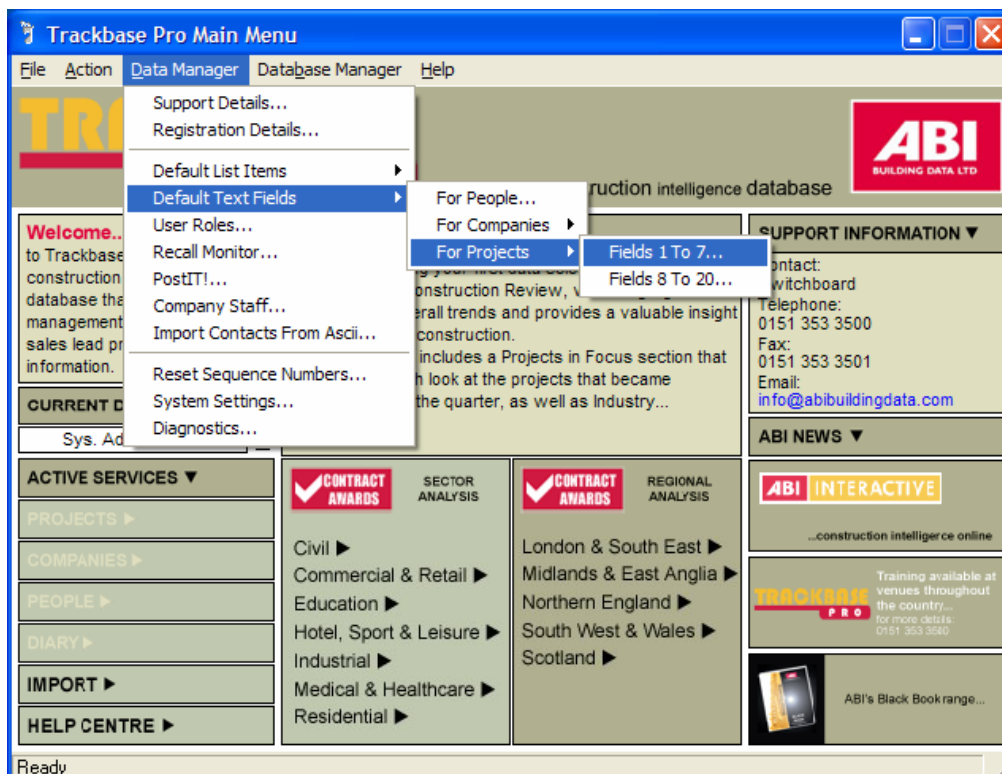
Text User Fields allow you to group different types of projects together under your own criteria.

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 Pro system and allocate the projects to your reps depending on who is best suited to deal with the individual projects.

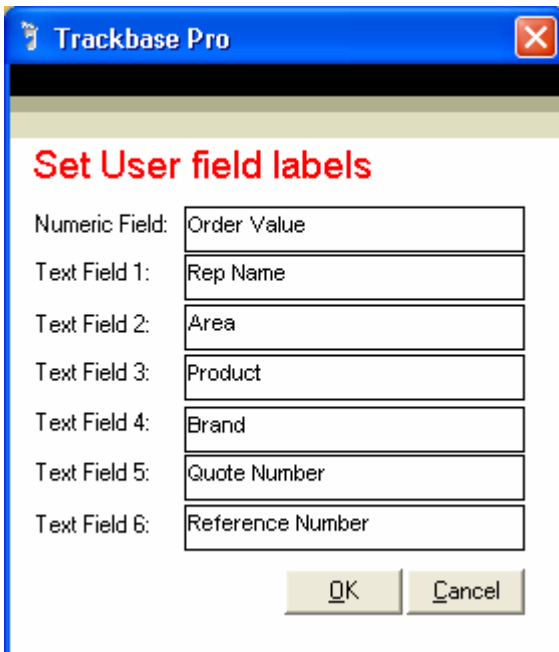
I am going to divide projects up in the following manner:

- Projects in the North of England under £70 Million in value go to Daisy
- Projects in the South of England under £70 Million go to Tim
- Projects in Scotland and all projects over £70 Million go to Marsha

As we are dividing our projects based on their location and value we first need to set up these User Fields. On the front screen of Trackbase Pro go to Data Manager, Default Text Fields, For Projects, Fields 1 to 7... 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 Pro. To change these you can just overtype the text.

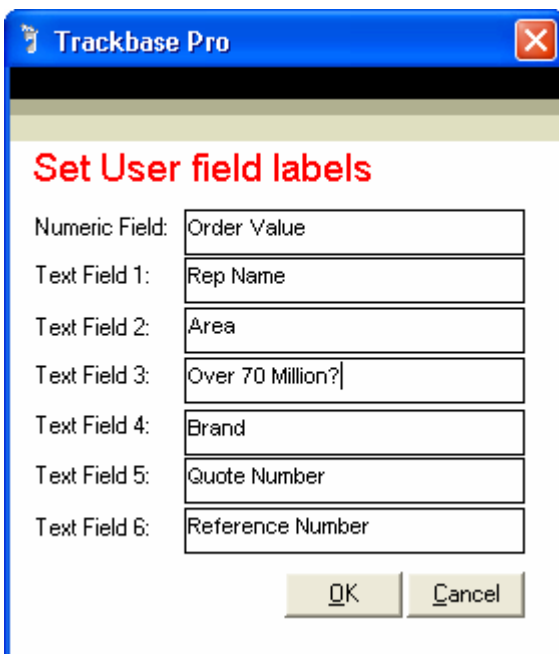


I am going to use three fields:

Text Field 1 will be Rep Name

Text Field 2 will be Area

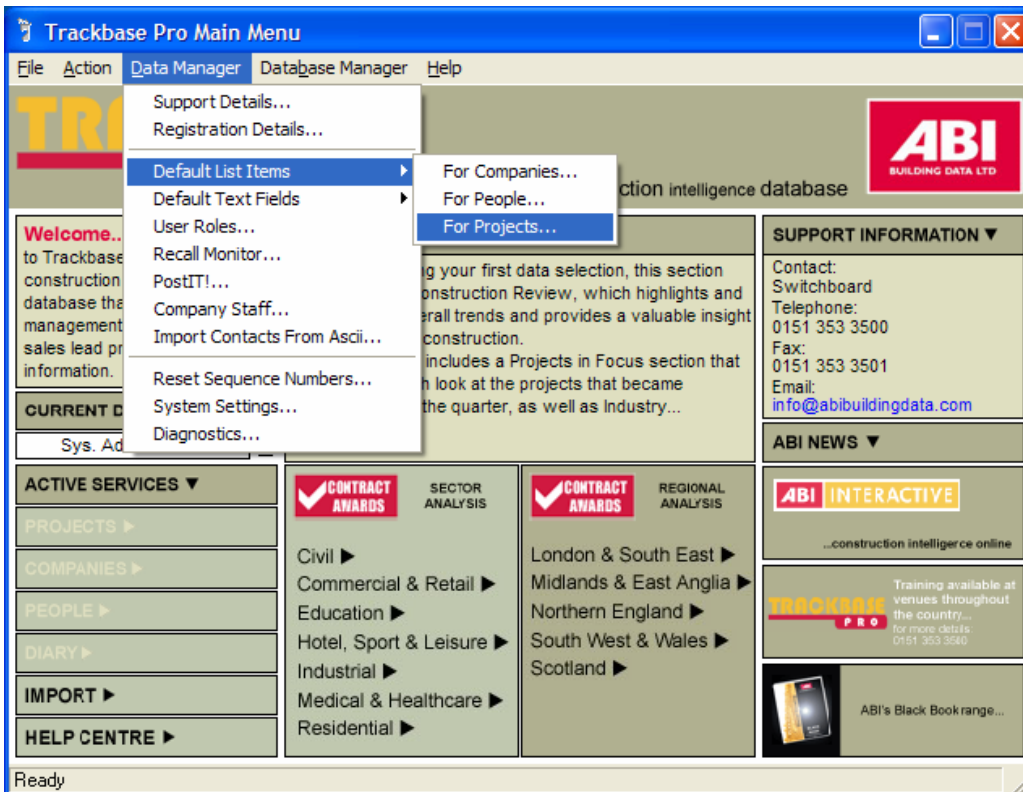
Text Field 3 will be Over 70 Million?



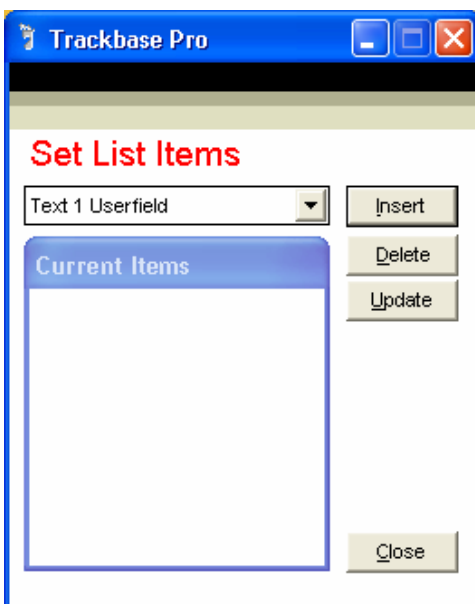
Once you have made any necessary changes to the titles of the User Fields, click on 'OK' to close the window and save your changes.

If you know that you will be using the same sub-headings for these fields, you can also add label text. For example, the reps names are going to be the same for the foreseeable future, to save typing these in you can add them as labels which will save you time in your future daily routine.

To add labels go to the front screen of Trackbase Pro and go to Data Manager, Default List Items, For Projects... and click to select.

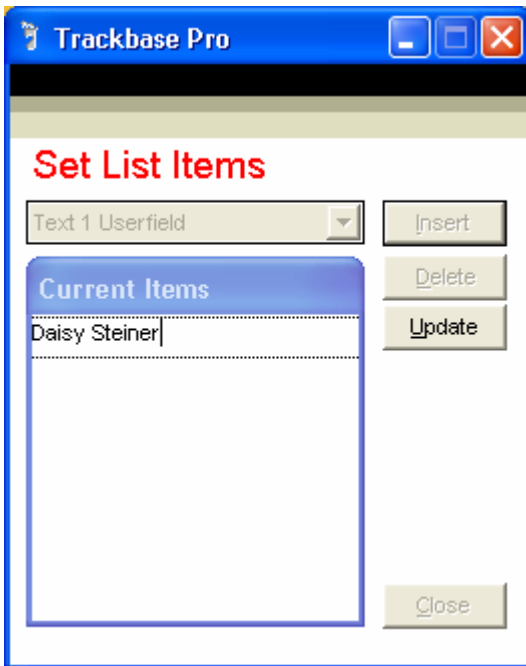


This will open up a separate window where you can add labels to your Text User Fields.

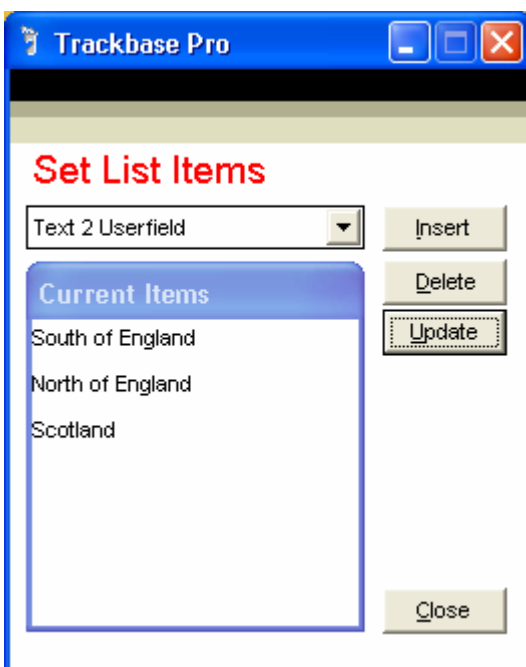


To add a label to Text Userfield 1 (Rep Name in this example), click on the 'Insert' button, the cursor will move to under Current Items and will allow you to type in the name of your Sales Rep.

Click on 'Update' to add this to the list. Continue clicking on 'Insert', adding the label text and clicking on 'Update' until you have added all your reps.

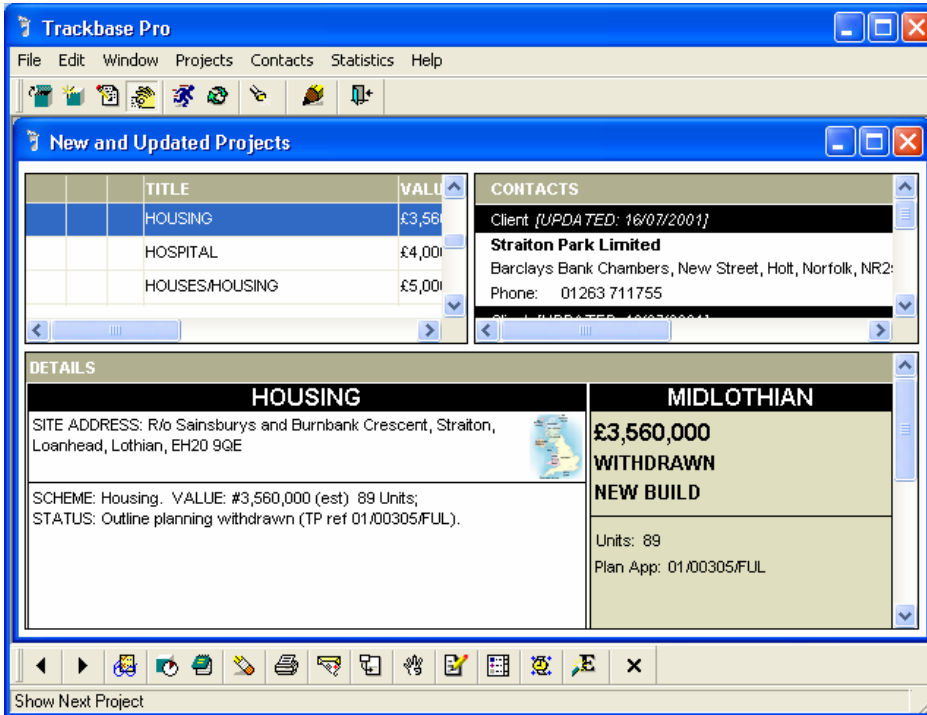


To add labels to the other Text User Fields, use the down arrow next to Text 1 User Field and select Text 2 User Field. In my example, I am dividing the projects based on whether they are in Scotland, the North of England or the South of England.




Now 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.

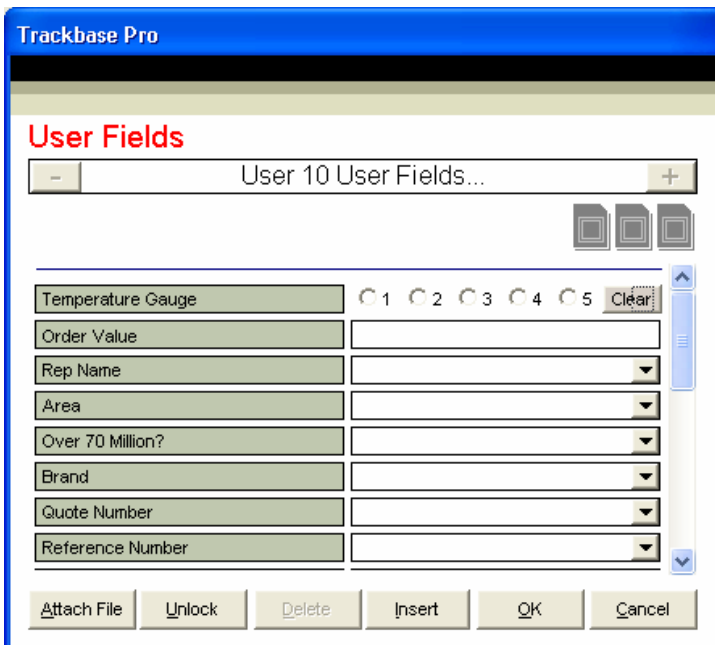
A project from my database is shown below.



This project is in Scotland and is under £70 million in Value.

To 'Tag' this project as Marsha's, we click on the Project Userfield button  on the bottom toolbar.

This opens the window shown below:



You can use the drop down arrows to select your details from the list, as shown with the 'Area' option below. Click on 'OK' to save these details.

The screenshot shows the 'User Fields' dialog box in Trackbase Pro. The title bar is blue and says 'Trackbase Pro'. The main title is 'User Fields' in red. Below the title is a header bar with a minus sign, the text 'User 10 User Fields...', and a plus sign. To the right of the header are three square icons. The main area contains several input fields: 'Temperature Gauge' with radio buttons 1-5 and a 'Clear' button; 'Order Value' with a text input; 'Rep Name' with a dropdown menu showing 'Marsha Klein'; 'Area' with a dropdown menu showing 'Scotland', 'North of England', and 'South of England'; 'Over 70 Million?' with a text input; 'Brand' with a text input; 'Quote Number' with a text input; and 'Reference Number' with a text input. At the bottom are buttons for 'Attach File', 'Unlock', and 'Delete'.

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