

Job Custom Fields - Setup

The Admin can setup up to 20 Job Custom Fields with one of the following field types: Checkbox, Date, Date and Time, Dropdown, Numeric, Radio Button, and Text. These field types can also be set to required or read only after entry.

Important: For any custom fields that are already preset with information if they are adjusted the information within that field will

A. No longer be applicable to the field description

B. The existing data will be overridden due to it previously being a text field and now that field has been changed to a different type such as a Date, Dropdown, etc.

Example:

The Deductible field is currently setup as a Text.

Additional Info

Property Type:

Deductible:

Policy Info:

Lockbox Code:

Rough Estimate:

Mold Present: Yes No

Standing Water: Yes No

Lead Test:

Completion %:

Survey Sent:

Survey Received:

The field type was changed from Text to a Dropdown, the \$1500 Deductible no longer displays. Because there was a value in the field the updated field will display a Data Validation Failed message. You can override this by adding a new value and saving the record.

**Reminder by doing this you may lose all historical data*

Additional Info

Property Type:

Deductible: Data Validation Failed

Policy Info:

Lockbox Code:

Rough Estimate:

Mold Present: Yes No

Standing Water: Yes No

Lead Test:

Completion %:

Survey Sent:

Survey Received:



Job Custom Fields - Setup

1. How to setup Job Custom Fields

- a) Go to Settings → Office Setup → Terminology → Job Custom 1-20
- b) Apply the Job Custom field description
- c) Click Save (💾)

Term	Singular	Max	Plural	Max	Abbreviation	Max
Job Custom Group:	<input type="text" value="Additional Info"/>	15				
Job Custom 1:	<input type="text" value="Deductible"/>	15				
Job Custom 2:	<input type="text" value="Policy Info"/>	15				
Job Custom 3:	<input type="text" value="Lockbox Code"/>	15				
Job Custom 4:	<input type="text" value="Rough Estimate"/>	15				
Job Custom 5:	<input type="text" value="Mold Present"/>	15				
Job Custom 6:	<input type="text" value="Standing Water"/>	15				
Job Custom 7:	<input type="text" value="Lead Test"/>	15				
Job Custom 8:	<input type="text" value="Completion %"/>	15				
Job Custom 9:	<input type="text" value="Survey Sent"/>	15				
Job Custom 10:	<input type="text" value="Survey Received"/>	15				

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2. After saving Terminology

- a) Go to the Settings (7th tab to the left of Terminology)
- b) Select the Number of Job custom fields to display from the drop down
- c) Click Save (💾)

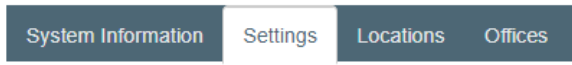
Office Detail	Settings	Notifications	Sub/Tech Ratings	Reporting	Categories	Master Documents	Document Templates	Terminology
Logos								
Login Logo/Image:								
Header Logo/Image:		974x68 pixels						
Report Logo/Image:								
		405x85 pixels						
Performance Options								
Load data on these pages on display: <input checked="" type="checkbox"/> Companies Page <input checked="" type="checkbox"/> Categories Page								
<input checked="" type="checkbox"/> Jobs Page <input checked="" type="checkbox"/> Subs/Techs Page								
<input type="checkbox"/> Losses Page <input checked="" type="checkbox"/> Contacts Page								
Time Zone								
Select Time Zone:		(GMT-06:00) Central Time (US & Canada) <small>*for future dates only. It will not change previously saved dates.</small>						
Other								
Number of days to add to due date when scheduled past the due date:		<input type="text" value="0"/>						
Number of days to add to due date when scheduled before (or on) the due date:		<input type="text" value="0"/>						
Number of Job staff to display:		6 (The minimum three are Estimator, Lead Tech and Marketing Rep)						
Number of Job custom fields to display:		10 Job Custom Fields Setup						
Number of Company Contact custom fields to display:		6						
Job Loss Information Text:		<input type="text" value="Loss Information"/>						
Job KPI Start Date:		1/1/2021 <input type="checkbox"/> Includes only job KPI's where date received is on or after this date.						
Number of custom KPI dates to display:		0						
Xactimate Profile:		Carrier						

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Job Custom Fields - Setup

If any of the custom fields will be setup as a Dropdown or Radio Button, you will need to setup the Job Custom Field Value Groups and Field Values. If none of your custom fields will be set as a Dropdown or Radio Button, proceed to Step 5 (Page 5).

- To setup Job Custom Field Value Groups go to Settings → System Setup → Settings → Job Settings, Job Custom Field Value Groups



System Information Settings Locations Offices

System Settings

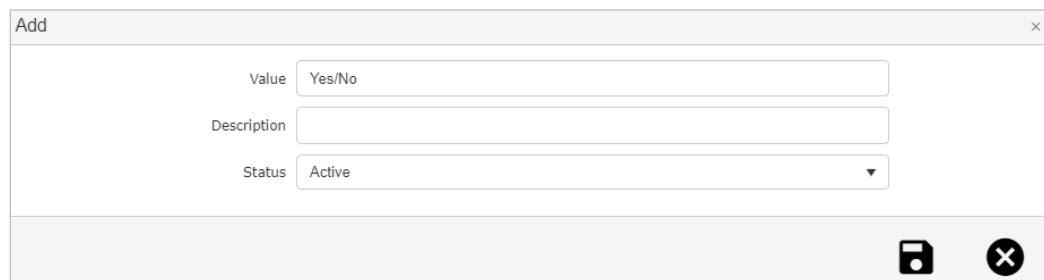
Various Lists:

- Job Settings**
- [System Default Document Folders](#)
- [Property Types](#)
- [Job Additional Staff Type](#)
- [Job Contact Types](#)
- [Job Progress](#)
- [Job Custom Field Value Groups](#)
- [Job Custom Field Values](#)

- Field Value Groups will need to be added to setup a Dropdown or Radio Button.
 - Click the Add icon (+)



Value	Description	Status
Average Estimate		Active
Percent		Active



Add

Value:

Description:

Status:

Save (disk icon) Close (X icon)

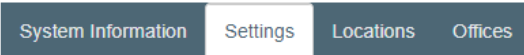
- Add the Value description
- Add the Description (if applicable) * *The Description is only viewable within the grid*
- Click Save (📁)

Proceed with steps a-d until all the Job Custom Field Value Groups have been added.

Note: The arrow to the top left of the page takes you back to the settings page.

Job Custom Fields - Setup

4. To setup Job Custom Field Values go to Settings → System Setup → Settings → Job Settings, Job Custom Field Values



System Settings

Various Lists:

Job Settings

[System Default Document Folders](#)

[Property Types](#)

[Job Additional Staff Type](#)

[Job Contact Types](#)

[Job Progress](#)

[Job Custom Field Value Groups](#)

[Job Custom Field Values](#)

- Add the Field Values that would be applicable to the Value Group.
 - Click the Add icon (+)

Job Custom Fields Setup

Value Group	Description	Abbreviation	Order	Status	
Average Estimate	1000 - 3000		1	Active	 
Average Estimate	3001 - 6000		1	Active	 

Add

Value Group: Yes/No


Description: Yes

Abbreviation: Y

Order: 1

Status: Active

- Select the Value Group from the dropdown
- Add the Description
- Add the Abbreviation (if applicable) * *The Abbreviation is only viewable within the grid*
- Apply an Order (if applicable)
- Click Save ()

Proceed with steps a-f until all the Job Custom Field Values have been added.

Note: The arrow to the top left of the page takes you back to the settings page.

Job Custom Fields - Setup

- To finish setting up Job Custom fields go to Settings → Office Setup → Settings → Other, Job Custom Fields Setup click the hyperlink to proceed.

Office Detail
Settings
Notifications
Sub/Tech Ratings
Reporting
Categories
Master Documents
Document Templates

Logos

Login Logo/Image:

Header Logo/Image:
974x68 pixels

Report Logo/Image:
405x85 pixels

Performance Options

Load data on these pages on display: Companies Page Categories Page
 Jobs Page Subs/Techs Page
 Losses Page Contacts Page

Time Zone

Select Time Zone: (GMT-06:00) Central 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:

Number of days to add to due date when scheduled before (or on) the due date:

Number of Job staff to display: (The minimum three are Estimator, Lead Tech and Marketing Rep)

Number of Job custom fields to display: Job Custom Fields Setup

Number of Company Contact custom fields to display:

Job Loss Information Text:

Job KPI Start Date: Includes only job KPI's where date received is on or after this date.

Number of custom KPI dates to display:

Xactimate Profile:

- Select the Pencil to Edit the Job Custom Field that you would like to modify. Within the edit page is where you can define the custom field type such as Checkbox, Date, Date and Time, Dropdown, Numeric, Radio Button, and Text. As well as the option to make the field required or read only.

Note: The arrow to the top left of the page takes you back to the settings page.

Job Custom Field #	Job Custom Field Name	Job Custom Field Type	Job Value Group	Read Only After Entry	Required	✎
jobCustom1	Deductible	Text		No	Yes	
jobCustom2	Policy Info	Text		No	No	
jobCustom3	Lockbox Code	Text		No	No	
jobCustom4	Rough Estimate	Numeric		No	No	
jobCustom5	Mold Present	Radio Button	Yes/No	No	No	
jobCustom6	Standing Water	Radio Button	Yes/No	No	No	
jobCustom7	Lead Test	Date and Time		No	No	
jobCustom8	Completion %	Dropdown	Percent	No	No	
jobCustom9	Survey Sent	Date		No	No	
jobCustom10	Survey Received	Checkbox		No	No	

Page 1 of 1
1 - 10 of 10 Items

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Job Custom Field # jobCustom6



Job Custom Field Name Standing Water


Job Custom Field Type Radio Button

Job Value Group Yes/No

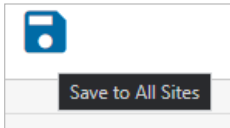
Read Only After Entry

Required

- a) Select the Job Custom Field Type from the dropdown (if applicable)
- b) Select the Job Value Group from the dropdown (if applicable)
- c) Check - Read Only After Entry (if applicable)
- d) Check – Required (if applicable)
- e) Click Save 

Important: The Save icon located to the bottom left of the Job Custom Fields Setup page will apply the custom field setup to All Sites (Offices).



Job Custom Fields can be applied within the Lead Entry Page or the Job Detail page.

Lead Entry Page

Note: If one of the custom fields has been defined as required the description will display in blue within the Lead Entry page.

Sources + +

Company:

Billing Contact:

Contact:

Reported By:

Referred By:

Source of Referral:

Agent:

Adjuster:

Other:

Other:

Claim #:

Deductible:



Policy Info:

Lockbox Code:


Rough Estimate:

Mold Present: Yes No

Standing Water: Yes No

Lead Test:  

Completion %: Please Select...

Survey Sent: 

Survey Received:



Job Custom Fields - Setup

Job Detail Page

Note: If one of the custom fields has been defined as required. If the field is null within the Job and the user saves the record the following pop-up will display and "Required" will display next to the field in Red.


General

Company: Oceanside Insurance
Company Contact:
#: 21-0501-RCN
Job Name: Auto generated Custom Job Name *Default is Primary Job Contact
Marketing Rep: Marketing Rep
Job Coordinator: Job Coordinator
Accounting: AR / AP
Email Sync: Training - Email Sync

Name

Claim #: 005662742-010
Address: 975 3rd St S Year Built: 2018
Building: Unit:
City: Jacksonville Beach State: FL Zip: 32250
Country: County:

Missing required information.



Additional Info

Property Type: Residential

Deductible: 500.00
Policy Info: 23546-0
Lockbox Code:
Rough Estimate: 0.00
Mold Present: Yes No
Standing Water: Yes No Required
Lead Test:
Completion %: Please Select...
Survey Sent:
Survey Received: