

Custom Fields Tab

Last Modified on 04/29/2022 10:21 am EDT

The Custom Fields tab will display the customer level custom fields. The fields shown on this page are configured by your company in Setup > Operations > Custom Fields.

History Button

Clicking on the History button will display a list of all changes that have been made to any of the custom fields, and which user made the change and when.

The screenshot displays a customer profile for Emily Wood. At the top, the name "Emily Wood" is shown with a profile icon, followed by "Customer #3719" and status indicators "Active" and "Normal". The account type is "Residential-Owner" and it was opened "Since 3/4/22". Navigation buttons for "Edit", "Tasks", and "History" are in the top right.

Financial summary shows "Total Balance Due" at \$822.71 and "Total RMR" at \$120.00. A "Customer Aging" bar chart shows two bars: a green bar for "Current" and a blue bar for "1-30 Days". The y-axis ranges from 0 to 1800. A legend below the chart identifies categories: Current (green), 1-30 Days (blue), 31-60 Days (orange), 61-90 Days (yellow), and 91+ (red).

Contact information includes: Address (45722 Chandler, Plymouth, MI 48170), Phone ((734) 258-4646), Cell ((734) 258-3311), and Email (emilyLwood@gmail.com). Salesperson is Dan Brown. Other details include "Last Statement", "Default Term", "Delivery Method", and "Delivery RMR Inv" with a "Print" button and a "YES" toggle.

A "Comments" section is visible below the contact info.

A navigation bar contains various tabs: Invoices (7), Credits (2), Sites/Systems (2/3), RMR (5), Work Orders (2), Proposals (0), Payments (8), CC/eCheck, Notes (0), Contacts (2), Documents, Archive, Custom Fields (selected), eForms, and Emails.

The "Custom Fields" tab is active, showing a "History" button in the top right. The field list includes: SecondEmail (text input), Website (text input), LeadName (text input), LeadPhoneNum1 (text input with a phone icon), and DateReferFeePaid (text input with a calendar icon). A "ReferralFee" dropdown menu is also present.