Object Types

The process to create an object is:

1. Create the Object Type (Setup > Object Type)

2. Define the Object Divisions (Setup > Object Divisions)

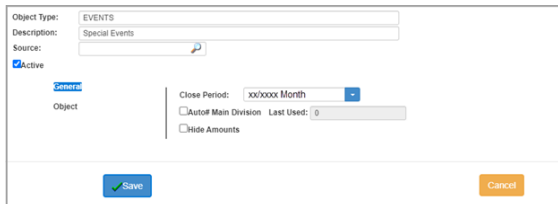3. Create the Object (Records > Objects > New)

Create the Object Type

The structure of the Object # (how many divisions, etc.) is determined by the setup of the Object Type. Object Types are defined in Setup > Object Types:

New Object Type Setup - Example

General:

Object Type: The Object Type you wish to create (e.g. PROJECT, EVENT, JOB, etc.)

Description: A description for the object type
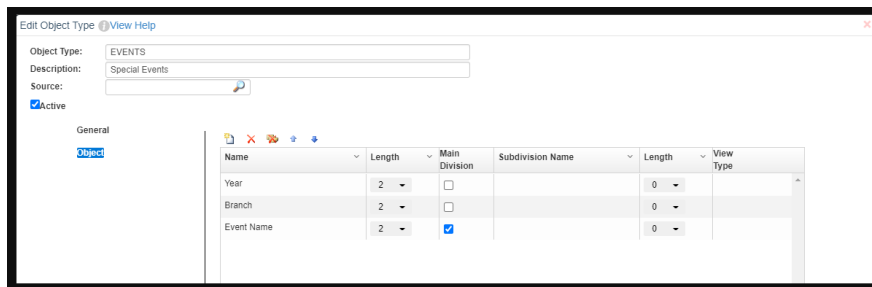
Source: Can be ignored

Active: If the object type is inactive, no entry will be allowed to it.

Close Period: Can be ignored

Auto# Main Division: allows the option for the system to assign the next sequential # for the Main division when adding new Objects

Hide Amounts: Can be ignored

- Object:

Name: Name of the division of the object number. This is the name that will appear on all reports, screens, etc.

Length: Length of the object division.

Main Division: The unique division that controls the object description (this is the division that will use Auto#)

Subdivision Name: Name of the subdivision of the object. This is the name that will appear on reports, etc.

Length: Length of the object subdivision.

Valid Characters: Choose what characters are allowed to be in object numbers.