

Object Types

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Object Types

Settings > Object Tracking > Object Types

The process to create an object is:

1. Create the Object Type (*Settings > Object Tracking > Object Type*)
2. Define the Object Divisions (*Settings > Object Tracking > Object Divisions*)
3. Create the Object (*Records > Objects > New*)

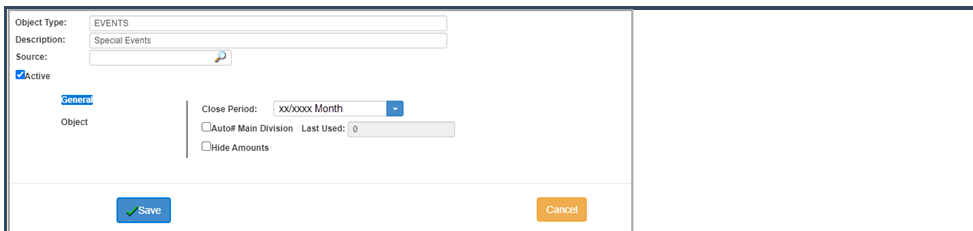
Create the Object Type

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



New Object Type Setup - Example

General:

A screenshot of a web form for creating a new object type. The form has the following fields and options:

- Object Type: TEXT input with value 'EVENTS'
- Description: TEXT input with value 'Special Events'
- Source: TEXT input with a search icon
- Active: Active
- Close Period: Dropdown menu with value 'xx/xxxx Month'
- Auto# Main Division: (Last Used: 0)
- Hide Amounts:

At the bottom, there are 'Save' and 'Cancel' buttons.

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

Description: A description of the object type.

Source: Can be ignored.

Active: No entry will be allowed if the object type is inactive.

Close Period: Can be ignored.

Auto# Main Division: allows the system to assign the following sequential number for the Main division when adding new Objects.

Hide Amounts: Can be ignored.

- **Object:**

The screenshot shows the 'Edit Object Type' window for 'EVENTS'. The 'Description' is 'Special Events'. The 'Active' checkbox is checked. The 'General' tab is selected, showing a table with columns: Name, Length, Main Division, Subdivision Name, Length, and View Type.

Name	Length	Main Division	Subdivision Name	Length	View Type
Year	2	<input type="checkbox"/>		0	
Branch	2	<input type="checkbox"/>		0	
Event Name	2	<input checked="" type="checkbox"/>		0	

Name: Name of the division of the object number. This name 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 number).

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.
