

Object Types

Last Modified on 03/10/2025 8:59 am EDT

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*)

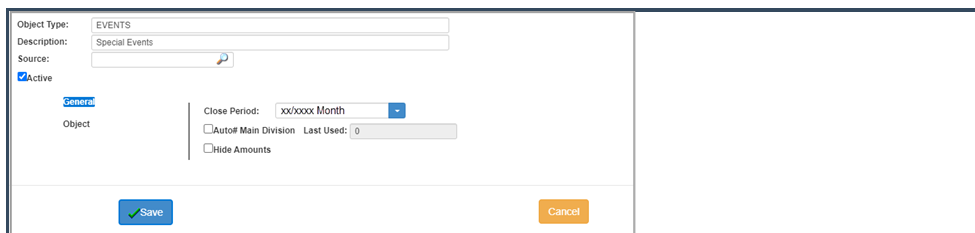
Create the Object Type

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:**

Edit Object Type

Object Type:
Description:
Source: 🔍 Grants
 Active

General

Object

+
×
🗑
↑
↓

| Name | Length | Main Division | Subdivision Name |
|---------|--------|-------------------------------------|------------------|
| Funding | 2 | <input type="checkbox"/> | |
| Year | 4 | <input type="checkbox"/> | |
| Type | 3 | <input type="checkbox"/> | |
| Grant # | 3 | <input checked="" type="checkbox"/> | |

Valid Characters: **Example:** 01-0123-012-012

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.