User Defined Fields

User Defined Fields gives you the ability to define fields for your RealtiWeb™, or RealtiBuilderSales applications to suit your own requirements, and then use them in documents where required.

How to use the User Defined Fields Feature

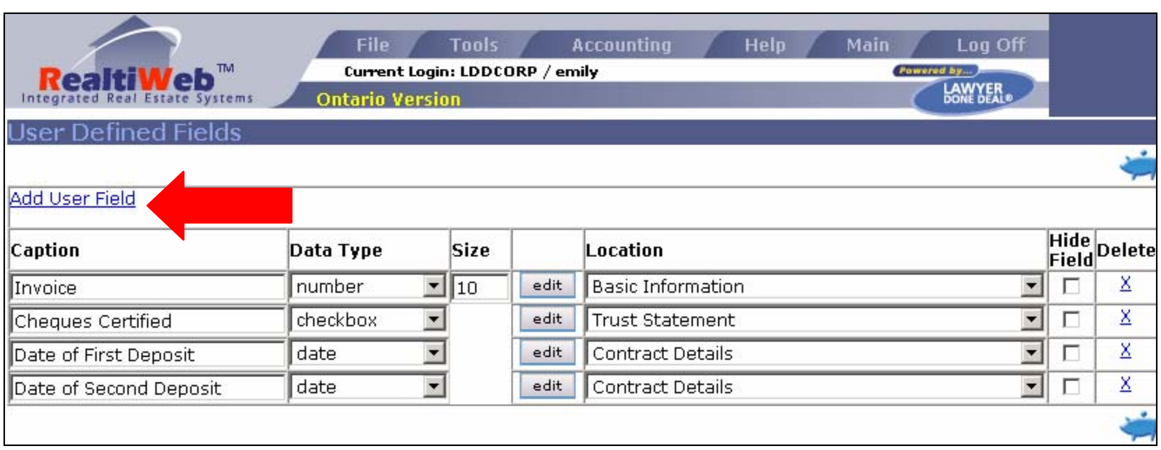
The process involves first defining the fields you wish to add to the program (this can be done at anytime), entering information into fields in a client file and inserting the fields into a document to be able to be merged into a document.

1. **Define the fields**

    i. Select Tools, User Defined Fields

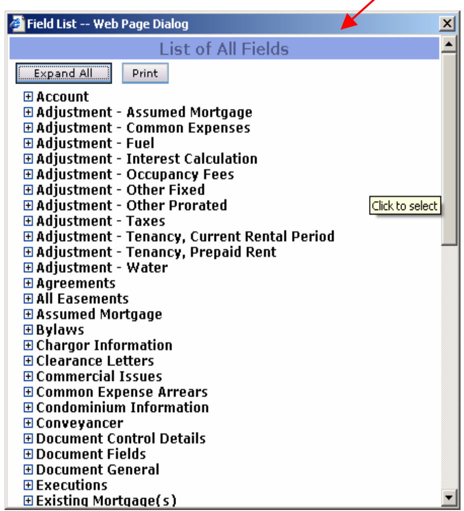
    ii. Define the fields you wish to add to your screens by:

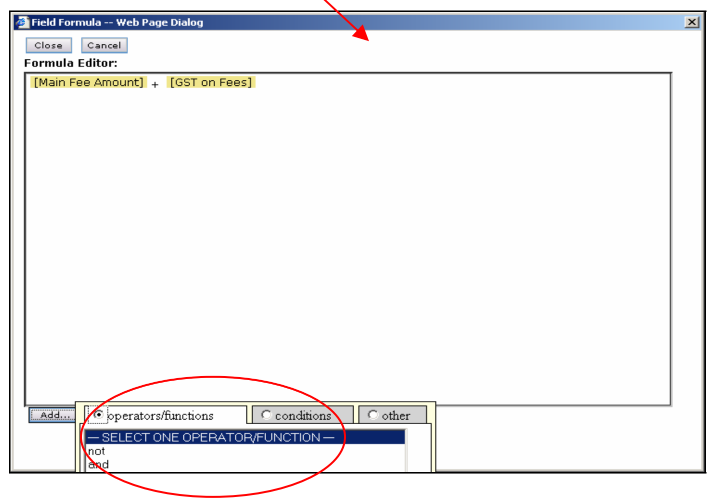
    - Selecting **Add User Field**



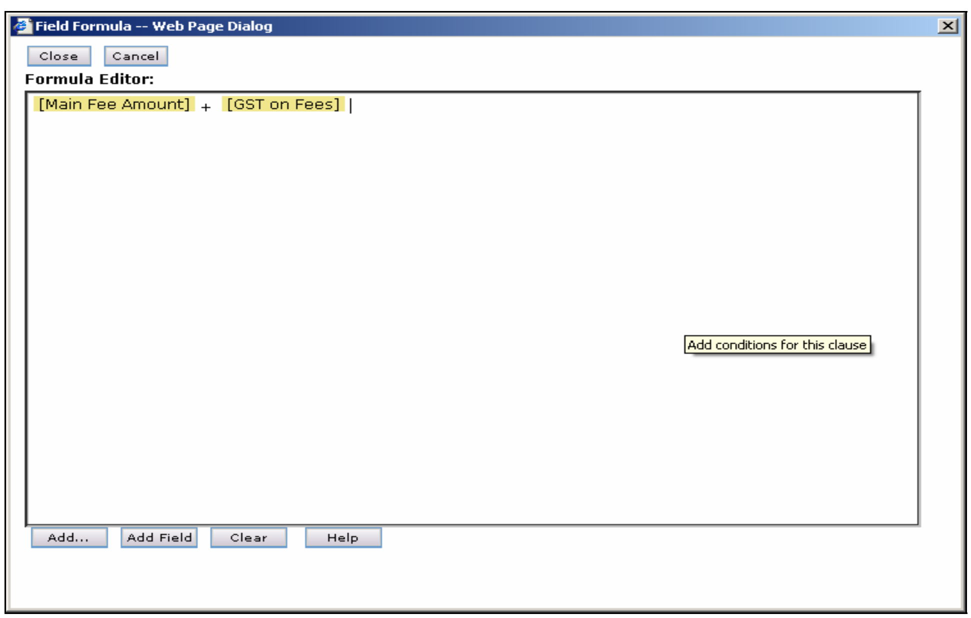
- Giving the field a caption, eg, Date of first deposit
- Specifying the data type from the dropdown selections – Text, Name, Money, Date, or Checkbox
- For Text and Name fields, specifying the length of the field

- For Money (formula) fields, click edit in the **Size** column to bring up the formula edit box. You can now type in your formula with the use of a field list and a condition list





Formula:

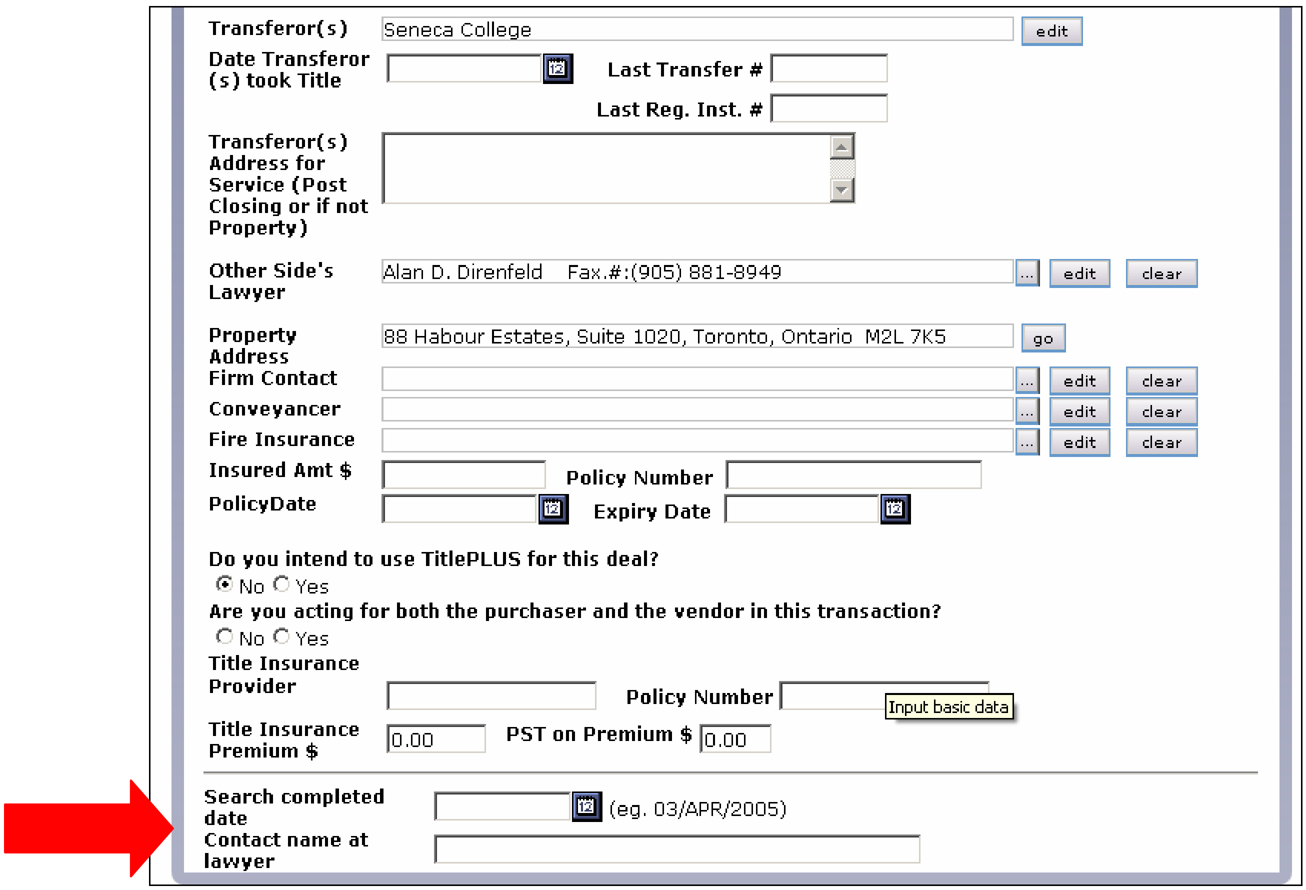


- Specifying the location of the field – ie, which screen it will appear at the bottom of the screen (Note that the accounting screen and adjustment screen, although they are in the list, are currently unavailable for User Fields)

- Repeating these steps for as many fields as you wish to define at once
- Click the (Save) after you have created your definitions
- To be able to see your new User Defined Fields in a client file, log out of the system after defining the fields, and log back in.

2. View the Newly Defined User Fields and Make Entries Into Those Fields

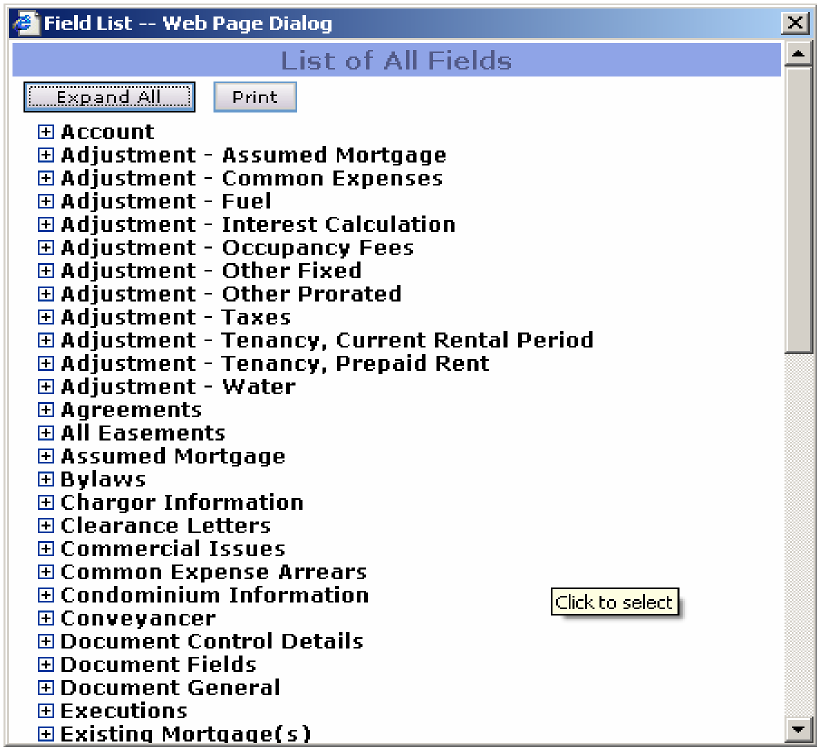
i. Load a client file, go to one of the screens on which you have a new User Defined Field and scroll down to the bottom of the screen.



Note that if you are not seeing the fields at the bottom of your screen, you may have not logged out of the system and gone back in. Remember that all users will need to log out and log back in to see the User defined fields after the fields are first defined.

If additional User Fields are added at a later time, again, users will need to log out of the system and get back in before the User defined Fields will display on their screens.

3. To use any of the User Defined fields in a document, edit your master document as you normally would. When it comes to adding the field into a document, you will find the user fields you defined, as you defined them, in the field list under **User Defined Fields**.



User defined Fields which you may have set up to display on the transferee screen, transferor screen, or mortgage screens must either occur in looped clauses or documents that loop, ie, where there is one document or clause per transferee, transferor or mortgage.