SMMware, Custom Fields Usage, Examples for Clients and Sales Leads/Jobs, v6

This document provides examples of how the custom fields for Client profiles has been used by other SMMware subscribers, and similarly for Job profiles. This is a supplement to our other onboarding/configuration documentation.

When deciding where to put a custom field, you should be guided by the idea that the information in a client custom field should be true regardless of where the client is living.

For instance, if a client needs a mobility aid (walker, wheelchair), presumably that is unrelated to where they live and therefore a custom field "Mobility Aid" belongs in the Client profile as opposed to the Job profile.

On the other hand, an elevator code or gate code will presumably only apply to one specific residence, and therefore belongs in the Sales Lead/Job profile as opposed to the Client profile.

Notes that Sales Leads and Jobs share the same custom field labels. When a Job is created from a Sales Lead, information entered into the Sales Lead's custom field is duplicated in the Job's custom fields.

It is good if the label for a custom field has a hint about the kind of information expected. For example, if a Job custom field is labelled 'Down Payment', it isn't clear whether the actual entry should be Yes or No, the amount, or the date received. So perhaps a better label would be 'Down Payment (Date)', to make it clear that you are in fact looking for a date.

Examples of Client Custom Fields (up to 12 fields)
- Health Issues
- Mental Acuity
- Mobility Aids
- Pet information
- Birthdays
- Call After (AM)
- Call Before (PM)

Examples of Sales Lead/Job Custom Fields (up to 28 fields)
- Territory
- Referred to
- Assessment Date
- Intake complete
- Inquiry call taken by
- Date of Inquiry

- Reason for move
- Reason for calling
- Primary service need
- Secondary service need
- Consult Date
- Contact Date
- Spoke to
- Intake Date/Time
- Intake Empl Name
- Realtor Name
- Gate code
- Clutter level: 1-5
- Floorplan (Y/N)
- Mover Hours
- Cleaning Hours
- Handyman Hours
- Basement/Locker Items? (Y/N)
- Garage Items? (Y/N)
- Shed Items? (Y/N)
- Off-site Storage? (Y/N)
- Attic Items? (Y/N)
- Items Other Loc? (desc)
- Selling Hours? (Y/N)
- House Listed? (Y/N)
- Sold Conditionally? (Y/N)
- House Sold? (Y/N)
- Garbage Day
- Package Chosen
- Package Rate
- Total Square Footage
- # of rooms
- # of bathrooms