

Color Coding in Clipxe

(modified 11-26-2010)

What is it?

Clipxe has a new feature that allows you to be able to have fields in the customer and jobs tabs have different colors. This will allow you to create a customized version that you can use to remind your staff which fields need to be filled out in Clip.

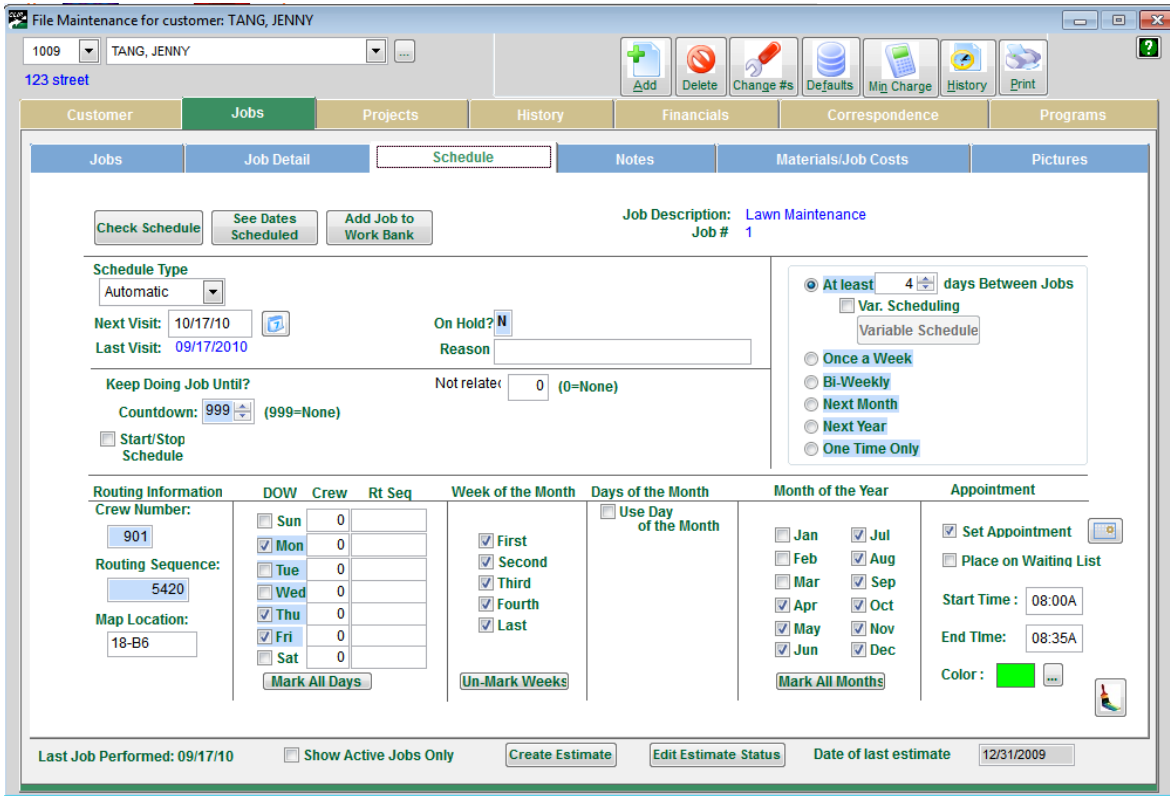
Here is an example using the main customer screen:

The screenshot shows a software window titled "File Maintenance for customer: TANG, JENNY". The interface includes a navigation bar with tabs for Customer, Jobs, Projects, History, Financials, Correspondence, and Programs. Below this is a sub-navigation bar with tabs for More Contacts, More Phone #s, Property Info, Notes, and Custom Fields. The main form contains the following fields and values:

- Customer Number:** 1009
- Property Name:** TANG, JENNY
- Address:** 123 street
- City:** Germantown
- State/Zip:** MD | 20874
- Tax Id:** MD
- City Code:** [Empty]
- Billing Name:** Jenny Tang
- Greeting:** Dear Jenny Tang
- C/O:** [Empty]
- Address:** 123 street
- City/State/Zip:** Germantown, MD | 20874
- E-Mail Address:** MingJTang@aol.com
- Work Phone:** () - [Empty]
- Home Phone:** (301) 591-4103 (wrong?)
- Fax Phone:** () - [Empty]
- Cell Phone:** () - [Empty]
- Credit Limit:** 1500.00
- CU.Custom Letters:** [Empty]
- Property Area:** 0.00
- Leaf Removal:** Y
- Customer Since:** 08/14/02
- Last Activity Date:** 09/17/10
- R/C Code:** R
- Customer Type:** [Empty]
- Finance Charge?:** N
- Billing Type:** Balance Forward
- Customer Category:** [Empty]
- Source:** [Empty]
- Reason:** AACTIVE
- Status:** ACTIVE

In the example above the light blue fields remind the staff to make sure that those fields are filled out for every customer they enter into Clipxe.

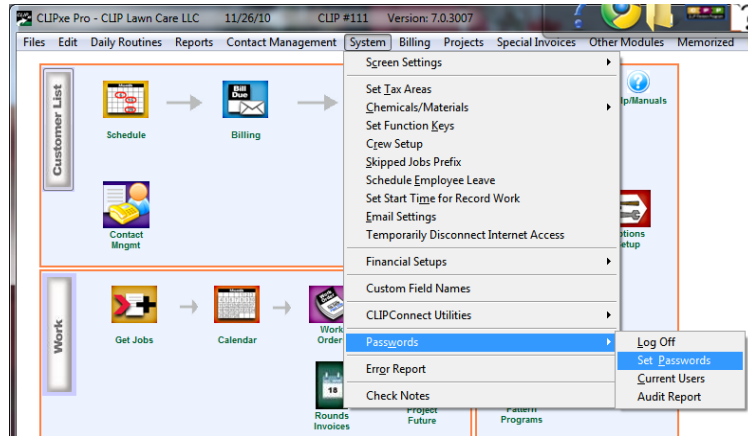
Here is another example using the job schedule screen:

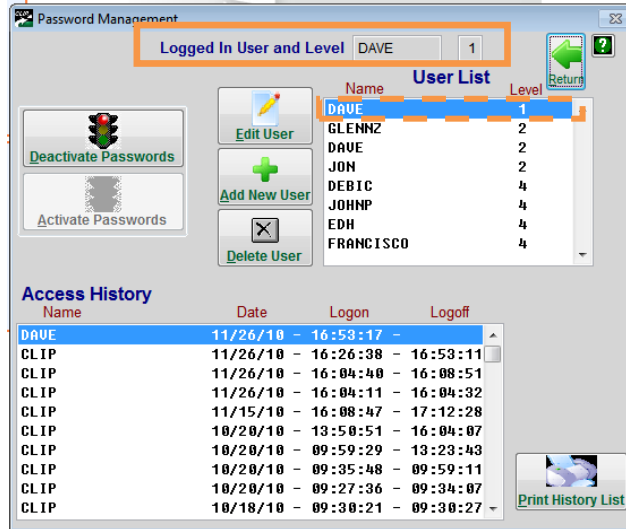


How do I do it?

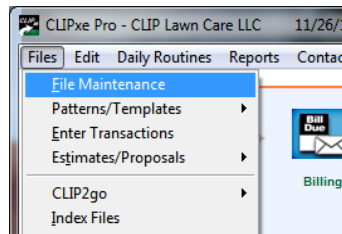
To create customized field colors for your version of simply follow the steps below:

1. Make sure that you are logged in as the level one user. Only the level one user can change colors inside of Clipxe. To make sure that you are logged in as the level one user go to System menu, click on passwords, then click on set passwords. Clipxe will show you the logged in user and level on that screen.



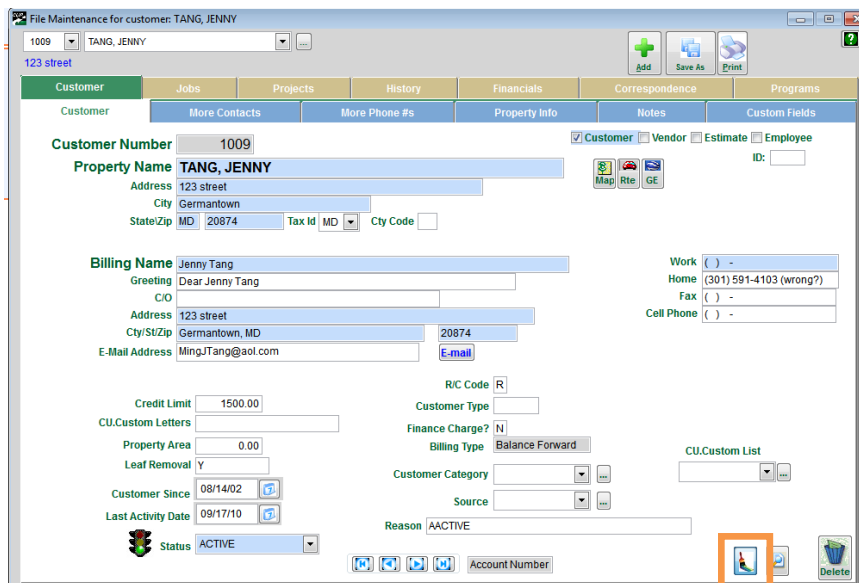


2. Go to the “Files” menu, then click on “File maintenance.”

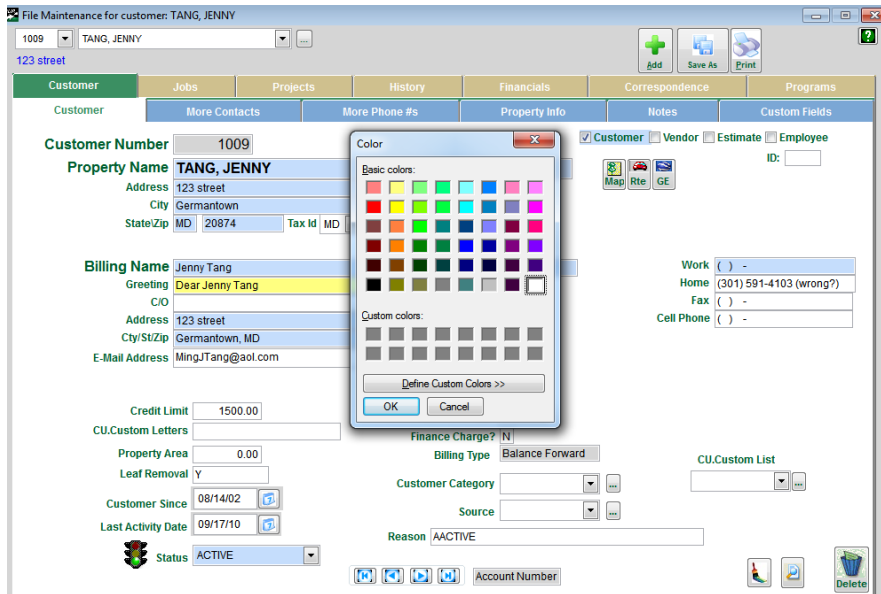


3. Choose a customer, then click on select to open their account.

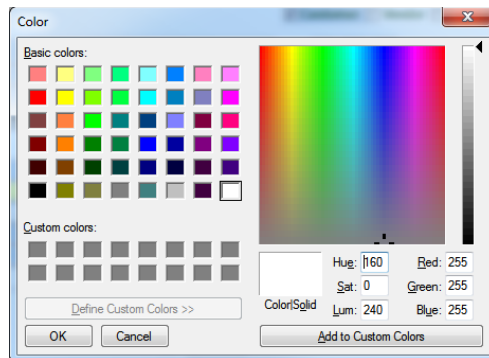
4. Click on the Paint brush icon in the lower right hand corner of the screen, then click on the field that you want to color.



5. Choose the color that you want, or click on “Define Custom Colors” to see more



After you click on define custom colors:



Frequently Asked Questions

Question : Why can't I see the paint brush on the customer and job screens?

Answer : Make sure that you are logged in with the *level one user account*. Only the user one level account can see that button to change the colors.

Question : How do I keep other people in the office from changing the colors?

Answer : Only the user with the level one user account can change it, so only the person with the level one user account will be able to change it. No one else will be able to change the colors.

Question : How do I reset all of the color codes back to white?

Answer : Go to Files menu, click on "Other utilities", then click on the "Dot Prompt" option.

Then type in "Use fieldcolors" and press enter, then type in "replace all fc_color with 0" and press enter again.

Then press the ESC key on your keyboard to leave.