

Serial Number Reset, Project Number, Job Number

Every time you create a job, it will be given a Project Number. The Project Number is composed of the Sales Number (from the Personalization "YOU" screen) and a serial number.

For example, if my Sales Number is 826, when I create a new job or clone an existing one, it will be numbered 826-12345, where 12345 is a serial number. The next job created will be x-12346, where x is the Sales Number of the Sales Rep creating it. Initials can be used instead of numbers, by the way, or a prefix common to all sales reps could be used that indicates perhaps the year the record is created. It is up to you.

If a manager changes the sales rep on the job, the project number will change accordingly, so that the Project always reflects the identity of the sales rep who is associated with that job.

The Project Number appears on the RFE and SOP, as well as in the fine print on the bottom of proposals, and you can use it in a FIND operation to locate that particular record, regardless of what job number or estimate number the record contains.

This Project Number can optionally be used as the job's estimate number, or job number, or invoice number, by clicking certain links- for example, on the first SPEX screen, the field label Job No. is underlined, and clicking it will insert the project number into the Job # field.

If you would like to change the serial number sequence, so that the next number is one that you want to specify, you can do the following (with management privileges.)

First, pull down Scripts, Isolate (#9) to make a single job the only Found record.

Next, go to the ADMIN screen.

Pull down Scripts, Manager Access (#1) to invoke management menu commands, which will cause the Records menu to appear in the top line of menu items (File Edit View etc.).

Click into the Serial Number field, then invoke the Replace Field Contents command from the Records menu.

Select the option to "Replace with serial numbers", and enter a new number you want to be used. Be sure that the Update check box is checked. Click Replace, and that record will be changed to the new number you specify, and the next record created will be incremented by 1, and so on after that.

Replace Field Contents

Permanently replace the contents of the field "Serial #" in the 1 records of the current found set?

Replace with: "7673"

Replace with serial numbers:

Initial value:

Increment by:

Update serial number in Entry Options?

Replace with calculated result: